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Examination of Underlying Factors in Success of TikTok

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ABSTRACT
This paper firstly performed a customer profile analysis by introducing seven assumptions related to TikTok customers, through researching, several conclusions can be reached: the majority of users are under 25 years old. TikTok users want an easy access to pass the time, save content and, more importantly, get personalized recommendations from the algorithm. Secondly, the revenue model is explained. Research shows that TikTok makes money in three main ways: advertising (both on the front page and in the feed), event marketing, and livestreaming. Finally, a business model canvas is made based on the utilization, easy to make friends, mass material copyright, technical support, partner market, consumer end and cost and other aspects.

Keywords: *TikTok, factors of success, Customer profile, Revenue model, Business canvas*

1. INTRODUCTION

The increasing reliance on mobile devices and the rapid updating on the network technology make mobile videos available and become an everyday possibility. Studies of consuming videos on mobile devices suggested that people prefer to view short episodes on their devices when accessing mobile videos, which may become a factor of the introduction of TIkTok [7]. TikTok, also known as Douyin in China, was launch by a Chinese technology company called ByteDance in 2016 [1]. It is a new social network site that enable users to watch, create, edit and share short-form video clips with 15 seconds in length. There are rich content formats consisting of filters and BGM (the short of 'background music'), to some extent contributing to the global viral phenomenon of TikTok usage and this short video sharing platform is claimed to become one of the fast-growing applications all over the world [2]. Data collected by Statista suggests that there are on average 800 million active users on TikTok worldwide by the year 2020 and TikTok has been reported to be the world most frequently first install application in 2018 [13]. TikTok seems to have been getting successful in the market, but how? The aim of this paper is to examine the reasons why TikTok is able to capture quite a significant share of the market by illustrating three methods (customer profiling, revenue model and business model canvas, respectively).

2. BUSINESS

2.1 Customer Profiling

It is of great important to profile the customer when setting a company. In order to define the customer of TikTok, several hypotheses have been made aiming at different aspects based on literature research and, including the gender and age of the customer, their pains as well as gains.

#1 Gender Hypothesis: There are more female TikTok users than male TikTok users.

#2 Age Hypothesis: the adolescence group, specifically the mid-adolescence (15-17) and the late adolescence (18 to 24), is the main customer in TikTok usage (The age range of mid-adolescence and late adolescence is defined by Psychology Today [12].)

#3 Gain Creator Hypothesis: Swiping through TikTok is a good way for customer to kill time.

#4 Gain Creator Hypothesis: The archiving character of TikTok makes it convenient for users to download and save their interesting and creative videos.

#5 Gain Creator Hypothesis: The artificial intelligence algorithms provides personalized video recommendation to every user which attracts the interest of customers.

#6 Pain Reliver Hypothesis: Uploaders' willing of expressing themselves is satisfied through using TikTok.

#7 Pain Reliver Hypothesis: the design of TikTok make it possible for every user to become famous if the video produced is attractive and gets lots of Likes and Views, which satisfies users need of fame-seeking and social recognition.

In order to examine the above hypotheses, relevant literature has been examined regarding the above hypothesis and summarized as follow.

The TikTok users' gender ratio is analyzed [10]. It led to a result that the percentage of male TikTok users is 53% and resulting to that of female TikTok users is 47%, while it is said that by the end of the first quarter of the year 2020, the man users in Douyin which is the Chinese original version of TikTok has the proportion of 43% and woman users using Douyin counts for 57% of the total Douyin users [5]. With regard to the users of TikTok, the hypothesis that the number of female users outweighs that of male users seems to be wrong. Moreover, if consider the users by gender globally, the gender hypothesis could not be proved as well, due to the lack of statistics.

GlobalWebIndex, a web market research company illustrated in its study that in 2019, 40 percent of TikTok users are made up of young generations aging between 16 and 24 that is in the range of mid-adolescence and late adolescence [6]. In particular, in order to give a further demonstration of this age hypothesis, four countries were selected, and their user age ranges were analyzed. First, we collected and ranked the TikTok (Douyin) usage data of people in each country from Statista which is an authoritative statistical website, and then plotted the top four bar images.

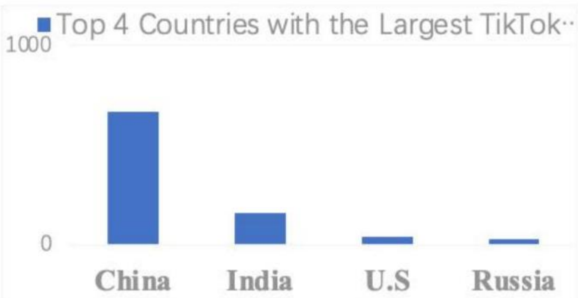

Figure 1. Top 4 Countries with the Largest TikTok Users

It can be illustrated from the above bar chart that the countries with the largest number of TikTok (Douyin) users is China (699.36 million), followed by India (160.12 million), U.S. (41.65 million) and Russia (28.16 million). It is stated that approximately sixty percent of the Douyin streaming users in China are under 30 years old [14]. In the United State, 32.5 percent of the total TikTok uses lies in the age group from 10 to 19, followed by a 29.5 percent of users aging between 20 and 29 [15]. Besides, study shows that the majority of Tiktok users in Russia were aged from 13 to 17 years old, which represents a proportion of 43 of the total users on the application [1]. Surprisingly, only 3 percent of total accounts were 35 years old or above.

With regard to the three gain creator hypotheses, It is argued in his study that the widely used algorithm contributes to the satisfaction of each TikTok user's personal preference about mobile video, which makes TikTok an entire interest-driven (both what you like and what you dislike) application [3]. TikTok has an extreme ability of customization. To be more specific, the For You Feed will deliver you series of video which are presumed that are likely to suit your interest, which is supported by a recommend system powered by strong algorithm. In particular, every one of the For You Feed is not exactly the same whilst there may exist a situation that some users may encounter same trended videos, this Feed is basically unique for every user [16]. The TikTok platform studies from every interaction happened during the usage, including the times and duration of you watching a particular video, the videos that are lying in your Favorites, seen as Figure 2 (Long press to add the videos that are interests you in the Favorites so that you can easily find them and review them again.) and the videos that you press a button and click on 'not interest' (Figure 3).

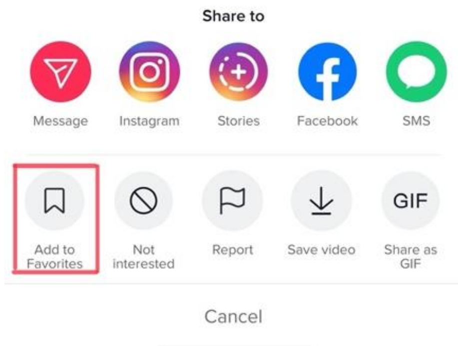

Figure 2 Favorite Button in TikTok

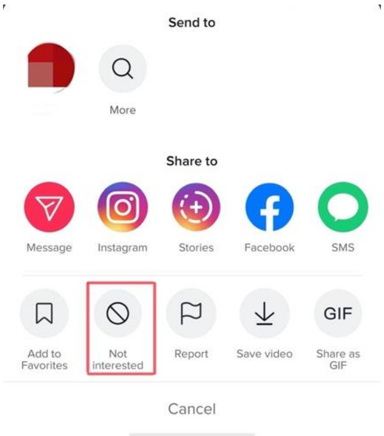

Figure 3 Not Interest Button in TikTok

Thus, people easily get into the customized feed and it is a good way to kill time. Moreover, the archiving character (Figure 4) makes users save their creative video into their phone conveniently in order to save and share wonderful moments and their own creativity.

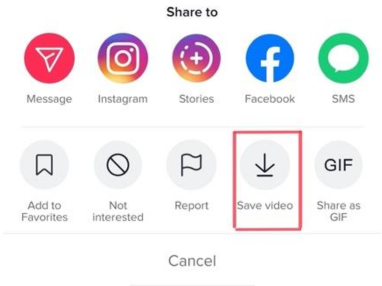

Figure 4 Archiving Character in TikTok

Regarding to the two pain reliver hypotheses, it is illustrated that adolescence has a non-negligible level of desire to express themselves. Therefore, self-expression is of vital importance in youth's development of mental health. TikTok provide teens, the largest group among all users, a platform to express themselves, through the user-based system. To give further explanation, users interaction is a fundamental way for TikTok users to express themselves. The video users like, or share gives out the information of your preference while the comments you post and content you create are the reflections of your thoughts. Besides, two of the most significant predictors to TikTok usage behavior are users' motivations which includes social recognition and the pursuit of fame [11]. With the assistance of TikTok's recommendation system, especially the push-flow mechanism, any content uploader who produces sophisticated, trendsetting or thought-provoking videos can acquire an opportunity to gain quite amount of likes and followers. Based on the algorithm, once a user likes you video, their subsequent outputs will frequently appear on his or hers Feed. If a user continues to make popular content, his or hers fanbase will continue to surge, which meets the need of fame-seeking and social recognition.

2.2 Revenue Model

It may be confused for some people that how TikTok makes money, in this part, three arguments are examined in the following paragraphs in order to analyze its revenue model.

2.2.1. Advertising Revenue

First of all, advertising revenue is a majority source in the revenue structure of TikTok. advertisement can be divided into homepage advertisement and in-feed advertisement. When it comes to the homepage advertisement, a wild spread form of mobile phone apps, the most common way is to display ads for approximately 3 seconds when the users open the apps. Advertising fee in this form is based on daily active users and opening frequency of a particular app, which has a usual charging mode of cost per time [4]. The price seems to show difference between static picture and dynamic video, according to the data in 2018, the dynamic ads cost 85,000USD more than static ads with the price of 485,000USD per day. Nowadays, TikTok gradually becomes the trend of the age, with the popularity of being used in more than 154 countries/areas, and the rapid growth in the number of users in recent years which already achieved more than 800 million (exceeding Reddit, Snapchat and LinkedIn). Advertisement effect and fee is increasing simultaneously bases on the facts above. As for in-feed advertisement, they are similar to the ads we see while rolling in the Instagram. When users scroll through the For You Feed on the TikTok, ads in the Feed are displayed which can last between 9 and 15 seconds. Unlike traditional ads, in-feed ads are displayed more like banners or very short videos inserting in relatively larger videos. This method helps to better combine advertisements with normal content, so that it can reduce users' aversion. The charging mode of the platform is usually CPM which is the price of advertisement viewed 100 times, and cost about 50USD per CPM accordingly [9]. With the support of artificial intelligence technology, TikTok can currently be charged adaptively by monitoring the data of every advertisement, including number of comments, sharing, viewers and the residence time of users. According to the AI technology and big data, TikTok can later recommend ads that are more suitable for users, thus attracting users to consume. In this case, the manufacturer will be willing to invest more advertising costs, which helps TikTok create the first closed-loop ecosystem.

2.2.2. Event marketing revenue

Event marketing is also a way for TikTok to make money. According to the big data, the platform will publish events to the users. Participants are unconsciously influenced by the event and may start to recognize or have a better impression of a particular brand. These events are often associated with the entertainment industry or food industry. For instance, for music release, musicians can buy a special event from the platform, asking users to use their new songs as background music for their video, so that the popularity of new songs will increase rapidly. Compared with the traditional event marketing, the utilization of TikTok for event marketing makes buyer avoid complicated preparatory work and the way of publishing and thus it becomes one of the ways to make profit.

2.2.3. Livestream revenue

The third point is a kind of revenue weighs in small quality but forms in huge quantities. In live rooms of many APPs, numbers of viewers are used to reward the anchors by buying virtual gifts. For live streaming companies, the virtual gift commission has been proved to be a reliable monetization method. The debut of Live Streaming of TikTok showed in November 2017, and soon TikTok began generating revenue through virtual gift commission. In the live room, you can exchange \$1.29 for 100 TikTok-coin, \$6.49 for 500 TikTok-coin, \$26.99 for 1000 TikTok-coin, \$1.29 for 200 TikTok-coin, \$66.99 for 5000 TikTok-coin, \$134.99 for 10000 TikTok-coin respectively, and the prices range from 1 coin to 1000 coins. When anchors receive virtual gifts, TikTok will distribute the revenue with anchors in particular proportion to make real profit.

2.3 Business Canvas Model

Combining the above customer profiling and revenue model with the existing information, the following business canvas model is made.

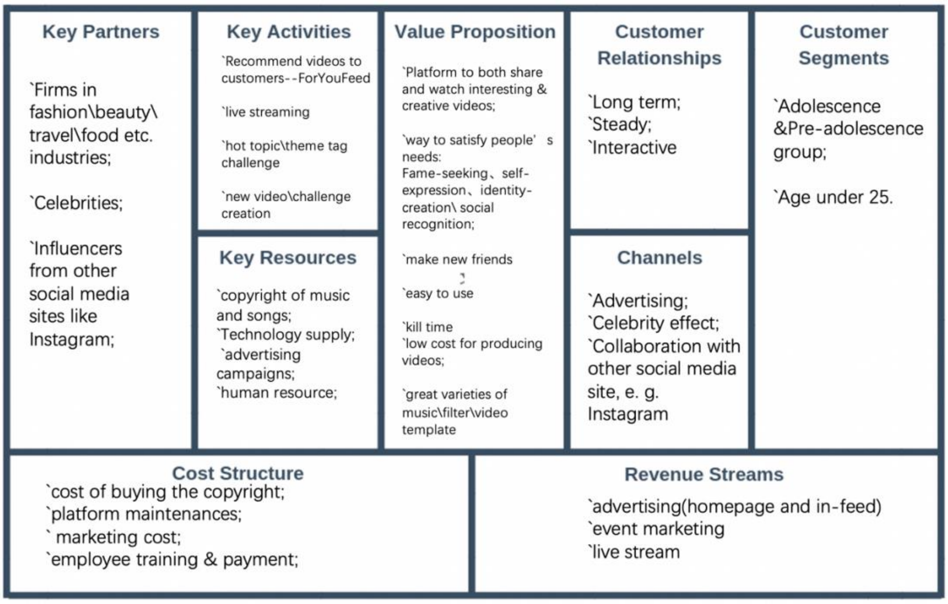

Figure 5 Figure Business Canvas Model of TikTok

To start with, the value proposition includes 7 elements. Firstly, TikTok is an easy to utilize platform providing users a place to get the sense of happiness from interesting video contents with very low cost for users to create and enjoy what they needed. For instance, every user can freely watch the video they like after registration physically and economically. Furthermore, if the users incline to spread their video to others, they can pay small amount of money to achieve their goals.

Beyond entertaining the users, tiktok also offers an incredibly excellent platform which synthesizes mostly all advantages of popular social networks. Through pressing 'LIKE' button or leaving comments, TikTok seems to provide users a channel to make new friends and even to broader their social network.

Except what we discuss above, because of owning huge intellectual property rights of music. TikTok has great varieties of music and filter template and thus creators can have a wide range of choices when making a trendsetting video.

As for the technical support, the recommend system which equipped with powerful algorithm provide an opportunity to satisfy three needs of their users (fame-seeking, self-expression and social recognition, respectively). TikTok's key activities includes not only live streaming and video\ challenge creation, but also a customized recommend system 'For You Feed' and hot topic tag challenge. The key resources are partly made up of the copy right of music and song, the other parts are technology supply like algorithm, advertising campaigns and human resources.

When we talk about the business canvas mode, partners are always essential. As for tiktok, it has an abrest of time view for its partners. Under this very version, fashion, beauty or travel and food industries and so on become one of them. Besides, TikTok puts celebrities and influencers from other social media sites into its partner list.

When it comes to the deeper side, consumer, TikTok aims to build a long term, steady and interactive relationship with their customers. The comments and suggestions on the various functions of TikTok is are welcomes. This application is open for general public, especially mid adolescence and late adolescence (age between 15 and 24) while the gender ratio is not likely to be determined. TikTok basically get attach to new customer by advertising, collaborate with celebrities and also, collaborate with other social media site. For instance, Instagram [8].

The cost is structured by platform maintenances, marketing cost and human resources cost, including employee training and payment fee. Apart from those, cost of buying the copyright of music and songs is also a main cost for TikTok. To construct the revenue model, both homepage advertising and in-feed advertising are the most significant monetization method of TikTok. Moreover, TikTok also makes money from event marketing and the share of live stream reward.

3. CONCLUSION

Three main parts are discussed in this paper. Firstly, customer profiling is examined by introducing 7 hypotheses related to TikTok's customers and researching to prove or oppose them. At the end of this section, we can conclude that most of the users are aging under twenty-five. People using TikTok are expecting to kill time, save their content conveniently and furthermore, to receive personalized recommendation from algorithm. Besides, the revenue stream is also illustrated. Research shows that there are three main monetization methods, advertising (both homepage and in-feed advertisement), event marketing and live streaming reward. Finally, based on that, a business model canvas is made in terms of utilization, easily accessible to make friends, huge copyright of materials, technical support, partners market, consumer side and costs.

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THE IMPLICATIONS OF TIKTOK AS A SOCIAL MEDIA ON CUSTOMER ATTRACTION

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ABSTRACT

In doing business promotion, using social media is a very relevant platform in 2020. Social media can help share and give small business exposure with relative ease and has been faster than ever. The reach of social media can grow to the millions of people from all around the world. But the actuality of the matter is, it's not easy to promote on social media due to the difficulty of having exposure without having to pay the premium to force the ads onto other users like Instagram for business (business.instagram.com). But we hypothesize that *TikTok* has an trending algorithm that makes user gets views on their videos more easily than other social media, also called the "For You Page". This is due to the basic nature of the viewing experience of the application, where usually our content will only be viewed by those who already followed us, but in *TikTok* our videos get promoted by an algorithm that shows our videos to other users that doesn't follow us. And the implications for business means that it is free and effective advertising.

Keywords: *Social Media, TikTok, Promotion, Advertising, Algorithm*

1. INTRODUCTION

Technology keeps advancing to the point where our everyday use-cases involves technology. This is more relevant in terms of communication, where social media is a platform that can allow users to interact and converse with other users faster and easily than ever before.

Social media is a term that describes the wide arrays of technology that is used to bind people to other people in a form of collaboration, information exchange, and interaction by using messages that is based off the web. Because the internet is always changing, the different types of technology and features that is available for users will also grow.

Social media has not only been used to communicate with friends but now it has also been used to promote businesses. Promotion in using social media happens because the users of social media has grown exponentially and has been a staple of everyone's day-to-day activity. In 2020, there has been 175,4 million internet users in Indonesia, and 160 million of them is an active social media user (wearesocial.com). So, in accordance to promotion, there has been strategies developed for marketing and promotion solely based on social media alone on platforms such as *Facebook, Twitter* and *Instagram.*

TikTok is the social media platform that is trending right now and it's seen in the monthly active user of 700 million user worldwide as of July 2020. The Chinese app has gathered over 2 Billion downloads as of writing this paper (katadata.co.id). The characteristics of the application itself is what draws users to actively take part in the social media app, it promotes content creation for anyone with an idea, and it rewards users for making good content with the *For You Page.*

The truth of the matter is, the secret of the *For You Page* algorithm is a secret to everyone except those working at the *TikTok* development, but we can hypothesize based on observations of the videos that are listed in the trending page. We observed that entertaining videos that are funny and interesting is the easiest and bulletproof way of making your videos into the *For You Page.*

By making use of the *TikTok* algorithm, businesses can create advertisements in hopes of promoting their brands or products for free, with high chance of exposure. That said, the video itself needs to be entertaining and create engagement with the users, but many have succeeded.

2. METHODOLOGY

The methodology of a study is important to conduct the research. According to Paul D. Leedy, in Practical Research 1974, Research Methodology is procedures or techniques used to identify, select, process, and analyze information about a topic. So, research will be done appropriately and orderly to solve the research problem. In this research, we use the quantitative approach. According to Kasiram (2008), the concept of quantitative research is a research method that uses numerical data processing as a tool for analyzing and conducting research mainly on what is being researched.

2.1 Data Collection

Quantitative research we used is by using a questionnaire that is filled by a sample of mainly University Students. Although there are a few respondents that are outside this sample, those respondents are only used for the anomaly data to see if there are any different view on the subject depending on the background of age or education, but this paper's main focus is that of university students namely in BINUS University. This questionnaire will also be categorized as the primary data for this research. Primary data is data obtained directly from the source, observed and recorded for the first time.

The tools used for the data gathering are Google Forms and the *TikTok* application itself. We have gathered 118 total respondents out of the target 100 respondents and asked 15 Questions based on the likelihood of deciding on purchasing or visiting a certain place because of a video on *TikTok*. Out of the 118 Total respondents, some of the respondents have to be nulled because of the contradictory answers, where some answered they have no social media, yet on the next question they filled what social media that they use, this leads to the total respondents of 114. Other than the quantitative approach of the questionnaire, we also asked a qualitative question on that very same questionnaire to ask the opinions of the respondents on what makes *TikTok* unique.

2.2 Observation

Beside questioners, we also use observation technique. Observation technique according to Marshal (1995) in (Sugiyono, 2016) states that "*through observation, researchers learn about behavior and the meaning inherent in these behaviors.*" It is through observation that the researcher learns about the behavior and the meaning of the behavior. Observations are then divided into three, namely participatory observation, frank and covert observation, and unstructured observation. In our research, we observe the writer viewing *TikTok* videos that are used for promotion. There are using a hashtag for promotions such as *#Startup* or *#Promosi*, and also normal videos that appear on the "For You Page" that is based on the trending *TikTok* algorithm.

This observation helps us define and analyze not only the effect of promoting videos on *TikTok* but also the effect of using hashtags in comparison to being letting the video go viral by itself without any hashtags. It also gives us a better understanding of the "For You Page" algorithm and how to get viral on *TikTok* for promotional use.T

2.3 Hypothesis

The hypothesis of this paper are as follows:

- Video based marketing on *TikTok* has a better chance of earning customer attraction.
- Video based marketing on *TikTok* is more enjoyable than regular advertisement due to the nature of *TikTok*, which is entertainment based.
- *TikTok* hashtags doesn't matter in terms of earning views and visibility on the "For You Page".
- People are more inclined to visit a certain destination or buy products on *TikTok* because of its engagement with the users, and due to psychological effects young people's tendency of doing something that is trending. (N Nguyen, 2011)

3. TABLES AND FIGURES

3.1 Data Collection

Table 1 Demographic Data of Respondents

Variable	Data
Age	<15 years old (n=4 ->3.4%)
	16-18 years old (n=18 ->15.3%)
	19-21 years old (n=83 ->70.3%)
	22-24 years old (n=8 ->6.8%)
	>25 years old (n=5 ->4.2%)
Occupation	Student (n=102 ->86.4%)
	Government employee (n=3 -

	>2.5%)
	Private employee (n=9 ->7.6%)
	Teacher/Lecturer (n=1 ->0.8%)
	Freelancer (n=2 ->1.7%)
	Lawyer (n=1 ->0.8%)
Social media user	Yes (n=112 ->94.9%)
	No (n=6 ->5.1%)
Social media platform	Facebook (n=74 -> 62.7%)
	Twitter (n=70 -> 59.3%)
	Instagram (n=104 -> 88.1%)
	YouTube (n=87 -> 73.7%)
	WhatsApp (n=91 -> 77.1%)
	Tik Tok (n=54 -> 45.8%)
	Line (n= 94 -> 79.7%)
	Pinterest (n=50 -> 42.4%)
	Tumblr (n=13 -> 11%
	Snapchat (n=1 -> 0.8%)
	Smule (n=1 ->0.8%)
	Discord (n=3 -> 2.4%)
	Telegram (n=1 -> 0.8%)
	Reddit (n=2 -> 1.6%)

Out of the 118 respondents who answered this questionnaire 4 people were under 15 years old, 18 people aged 16-18 years, 83 people aged 19-21 years, 8 people aged 22-24 years, 5 people were over 25 years, so the majority who answered our questionnaire are 19-21 years old, as many as 83 people out of 118 people who answered or 70.3%.
Next, we find out about their jobs where 102 people are students, then 3 people working for government employees, and 9 people working as private employees, and 1 person working as a teacher/lecturer, and 1 person working as a lawyer, so that most jobs owned by respondents were students, that are 102 people or 86.4%.
We also asked the respondents about the use of social media, and out of 118 respondents 112 of them had social media and the remaining 6 respondents did not have social media.
Out of the 112 respondents who use social media, there are various kinds of social media used by respondents and some even use more than one of them, 74 people use Facebook, 70 people use Twitter, 87 people use Instagram, 87 people use YouTube, 91 people use WhatsApp. , 54 people used Tik Tok, 94 people used Line, 50 people used Pinterest, 13 people used Tumblr, 1 person used Snapchat, 1 person used Smule, 3 people used discord, 1 person used telegram, 2 people used Reddit. So, the application most used by respondents is Instagram, which is 104 people or 88.1%.

Table 2 Factor of People Shopping Online

Variable	Data
The Usual Place To Online Shop	E-commerce (n= 95 , (80,5 %)
	Social media (n= 51 , (43,2 %)
	Website (n= 35 (29,7 %)
	Lazada (n= 1 (0,8 %)
	Amohn Gus (n= 1 (0,8 %)
	Zalora (n= 1 (0,8 %)
Info About Products	Word of mounth 54 , (n=45, 8 %)
	Tv (n=18 , 15.3 %)
	Social media 99 , (n=83, 9 %)
	Rekomendasi Oshop (n=1, 0.8 %)
	Youtube, Sekolah (n=1, 0.8%)
	Internet 1 (0,8 %)
	Youtube 1 (0,8 %)
	Wiki 1 (0,8 %)
	Search Engines 1 (0,8 %)
Product Purchasing Factor	Price (n=72 , 61 %)
	Quality (n=83 , 70.3%)
	Uses (n=74 , 62.7 %)
	Needs (n=87, 73.7 %)
	Interesting promotion (n=35, 29.7 %)
	Attractive appearance (n=1, 0.8 %)
	Hobby (n=1, 0.8 %)

According to the results of a survey conducted from 118 respondents, it was found that 94.1% of respondents admitted that they had shopped online.

From the results of the survey above that asked about the usual place to shop online, there were 118 respondents who filled out the survey proving that out of 118 respondents doing online shopping at various kinds of shops, around 80.5% or 95 respondents admitted shopping in e-commerce and as many as 51 respondents admitted shopping online on social media, the remaining only 1 person (0.8%) admitted shopping at Lazada, Amohn Gus, Zalora

Of the 118 respondents admitted that they knew that a product they were going to buy was known through Word Of Mounth as many as 54 people or 45.8% and there were also 18 respondents who watched on TV and more who claimed to know through Social Media as many as 99 people or 83.9% of respondents from 118, and the remaining

0.8% know through school, internet, youtube, wiki and search engines.
Following are the results of a survey of 118 respondents regarding the factors that encourage buyers to buy these products, of the 118 respondents who chose the price factor were 72 people or 61%, while those who viewed in terms of quality were 70.3% or 83 people, then as many as 74 people claim to see the usefulness of these items. And there are also those who see in terms of needs as many as 87 respondents and 35 respondents see an attractive promotion and only 1 person chooses the factors of interest and hobbies.

Questions	Data
Do you know Tik Tok app?	Yes (n=108 -> 91.5%)
	No (n=7 -> 5.9%)
	Maybe (n=3 -> 12.5h %)
Have you ever seen people promoting products through Tik Tok?	Yes (n=106 -> 89.8.2%)
	No (n =12 -> 10.2%)
How do you think about people promoting on Tik Tok?	Strongly disagree (n =6 -> 5.1%)
	Disagree (n=8 -> 6.8%)
	Neither agree nor disagree (n=32 -> 22.5%)
	Agree (n=39 -> 33.1%)
	Strongly agree (n=33 -> 28%)
Have you ever bought a product from the influence of Tik Tok promotions?	Yes (n=40 -> 39.2%)
	No (n=62 -> 60.8%)
Have you ever visited a place because of the Tik Tok promotions?	Yes (n=44 -> 43.1%)
	No (n=58 -> 56.9%)
Have you ever bought a product from Tik Tok that was promoted on other social media?	Yes (n=42 -> 41.2%)
	No (n=60 -> 58.8%)

Table 3 Tik Tok Data of Respondents

From section 3 of the questionnaire that we have distributed about Tik Tok, we can see that a lot of our participant knows about Tik Tok app because 94.1% knows about the application and only 4.9% of the participant did not know Tik Tok app from 102 participants. In the next question about promoting products through Tik Tok app, we can see that 91.2% of our participant have seen people promoting their products and only 8.8% of the participant have not seen people promoting their products through Tik Tok app from 102 participants. The following questions is about how the participant thinks about people promoting on Tik Tok. As we can see that 5.9% of participant is strongly disagree about people promoting on Tik Tok. Another 5.9% of the participant is disagree with the state that people promoting on Tik Tok app. Nevertheless, 22.5% of the participant answer that they are neither agree nor disagree about people promoting on Tik Tok. Then we can also see that 35.3% of the participant agree with the state that people promoting on Tik Tok. Lastly, 30.4% of our participant are strongly agree that people are promoting on Tik Tok from 102 participants.

Onto the next question, we can confirm that only 39.2% has ever bought a product from the influence of Tik Tok promotions and the other 60.8% has not ever bought a product from the influence of Tik Tok promotions. This states that most of our participants have not bought a product because of the influence of Tik Tok promotions but maybe another social media that influence them to buy a product. Further questions is about have our participants visited a place because of the Tik Tok promotions. The following results shows us that 43.1% has visited a place because of the Tik Tok promotions and 56.9% have not visited a place because of the Tik Tok promotions. This state shows us that most of our participant has not visited a place because of Tik Tok promotions. The last questions is about have our participants ever bought a product from Tik Tok that was promoted on other social media. From the following results, we can see that 41.2% of our participant have bought a product from Tik Tok that was promoted on other social media. In addition, 58.8% of our participant has never bought a product from Tik Tok that was promoted from other social media.

3.2 Analysis Data

From the data above, because we want to find out whether the data filled in by the respondents are valid, we test the truth of the data by giving trick questions that will test whether the respondent answers correctly and after the test, the results are not 100% valid because of the 118 respondents who answered the question 6 people answered incorrectly.

So we know that out of 118 respondents 108 of them have social media and 98 of them are students. From the valid data, respondents who use social media the most are Instagram with 100 users or 100% students using Instagram, and Tik Tok application users as many as 54 people or 55% who use Tik Tok from the total social media users from the research.

The valid data we get regarding students who have social media who have shopped online is not influenced by the validity test because everyone can also shop online from various platforms. From there we know that users who shop online get information on products they buy from social media as many as 96 respondents or 88.9% of respondents who have social media. And the factors that can make respondents interested in buying a product are the need, quality, and usability.

Data from the effect of Tik Tok on the attractiveness of student online shopping found that 94% of respondents that is 111 respondents know about the Tik Tok application, and 89.8% of respondents have seen people promoting their products through Tik Tok, from this data 39.8% have bought products of the promotion and 43.2% of people have been to the place that promotes on Tik Tok. Not only that, 47 respondents, or 35.8% of respondents have bought Tik Tok promotional products that are promoted on other social media.

From this data, it is found that Tik Tok is not just social media but Tik Tok has a uniqueness that other social media does not have so the video results from Tik Tok even though they are shared on various platforms can still attract the attention of users. The percentage of Tik Tok users towards the community and social media users is quite high also the purchasing power and also the attractiveness of the Tik Tok application is also very high for people who see it, so if people see promotions through Tik Tok the percentage to make them more interested higher than just promoting with just picture, so student or user more possible to buy or participate in promotions on Tik Tok media.

4. Conclusion

The implication TikTok for business means that it is free and effective advertising. Social media can help share and give small business exposure with relative ease and has been faster.

Based on the results of this research analysis using questionnaires as tools for collecting data and samples, we gave gathered 118 total respondents out of the target 100 respondents attractiveness to use TikTok application for media business promotion.

Business can create advertisements in hopes of promoting their brands or products for free, with high chance of exposure. People are more inclined to visit a certain destination or buy products on TikTok because of its engagement with the users, and due to psychological effects young people's tendency of doing something that is trending. Video based marketing on TikTok is more enjoyable than regular advertisement due to the nature of TikTok, Which is entertainment based. Video based marketing on TikTok has a better chance of earning customer attraction.

We can see that Tik Tok has low on popularity of use when it comes to business. Buying items and promoting items seems to alien to most of our participants. Even though, most of them agree that people promoting on Tik Tok which is not a bad thing promoting products on Tik Tok. Tik Tok is well known for its entertainment tool but seeing it as a media to promote business still very rare to do even though most of our participants have seen other people promoting their product or brand through Tik Tok.

Based on the research that has been done, we concluded that the TikTok application will be an effective place as a promotional media and from the results of the TikTok questionnaire a high percentage and is interesting than other social media.

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How Social Media Marketing and Advertising is helpful for Small Businesses

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ABSTRACT

In the present scenario social media is being used to provide an identity about the companies and the items or solutions that they are providing. Social media is proving itself useful for creating connection with those who might not otherwise aware about the items or support or what the companies is representing. It is nowadays the best possible way to get in touch with potential customers. A huge number of customers are already interacting with Brands through social media, and if a new or old (well established) company is not speaking directly to its customer through social platform like Facebook, Twitter, Instagram and Pinterest, it's missing something big! The Best example of Internet marketing is Social Media marketing (SMM) that involves creating and sharing content on Social Media Networks to your marketing and branding goals. It also gives you the power of learn more about your audience, their interests and achieve collect feedback. In this paper, we are going to discuss about the role of social media sites in small businesses, its marketing strategies in Indian market context. We will also discuss about the concept of social media and other aspects like the growth and benefits.

Keywords: *Social Media Marketing (SMM), Marketing Strategies, Branding, Online Customers, Advertisement*

INTRODUCTION

In the current scenario every business needs a proper social media channels to advertise in the best possible way. Although, it sounds simple but their target audience is hanging around the popular social networks. And they are engaging with their favourite brands and connecting with them on different levels. Today social media touch is given to almost every business, we not only connect with our customers better and serve them on a higher level but also generate more business. It actually makes our online marketing easier. In Fact, an information graphic published in Jan 2017, 70% of customer are more likely to recommend a brand to others if they have a positive experience with it on social media.

Fig. no.1

There are many ways that social media help us to increase sales and can impact conversions but for that, we need first to understand the importance of social media in business and take the necessary steps.

Concept of Social Media

All the online communications channels dedicated to community-based input, interaction, content-sharing are collectively known as social media.It provides the facility of Interactions among people in which we create, share, or exchange information, ideas and views with online communities. It is implemented and managed mainly by Facebook, Twitter, Instagram, Snapchat, YouTube and Video accounts. We can access social media services through web-based technologies on desktop, computers, and laptops, or through their mobile Apps. It provides the facility to consults with schools, departments and offices looking to form or maintain an existing social media presence to discuss social media goals and strategy. Before creating any social media account, it is required to submit the Account Request Form.

Fig. no.2

Key Principles for Social Media Managers

Social media is about conversations, community, connecting with the audience and building relationships. It is not just a broadcast channel or a sales and marketing tool. Authenticity, honesty and open dialogue are key.

Social media not only allows you to hear what people say about you but enables you to respond. Listen first, speak second. Be compelling, useful, relevant and engaging. One more important thing is your voice, your voice should be clear. Your audience identifies you with your voice. If it is predominantly young and trendy, so be it. If it is corporate and professional, then this is the way you go.

Popular Social Media Tools and Platforms

Blogs: Blog is a short form of Weblog.It is a website or informal online journal, wherelatest posts appearing first, that is written and updated regularly in conversational style. It provides a platform where we can share our views on a specific topic or opinion.

Facebook:- The world’s largest social network, with more than 2.2 billion monthly active users (As of the fourth quarter of 2017). Users create a personal profile, add other users as friends, and exchange messages, including status updates. Brands create pages and Facebook users can “like” brands’ pages.

Twitter:- Twitter is a social networking stage where users can post and interact with short messages, known as "tweets." These messages were originally 140 characters limit, but on November 7, 2017, the limit was doubled to 280 characters for all languages except Japanese, Korean, and Chinese.[11]

YouTube &Video:- Video hosting and watching websites.Flickr: An image and video hosting website and online community. Photos can be shared on Facebook and Twitter and other social networking sites.

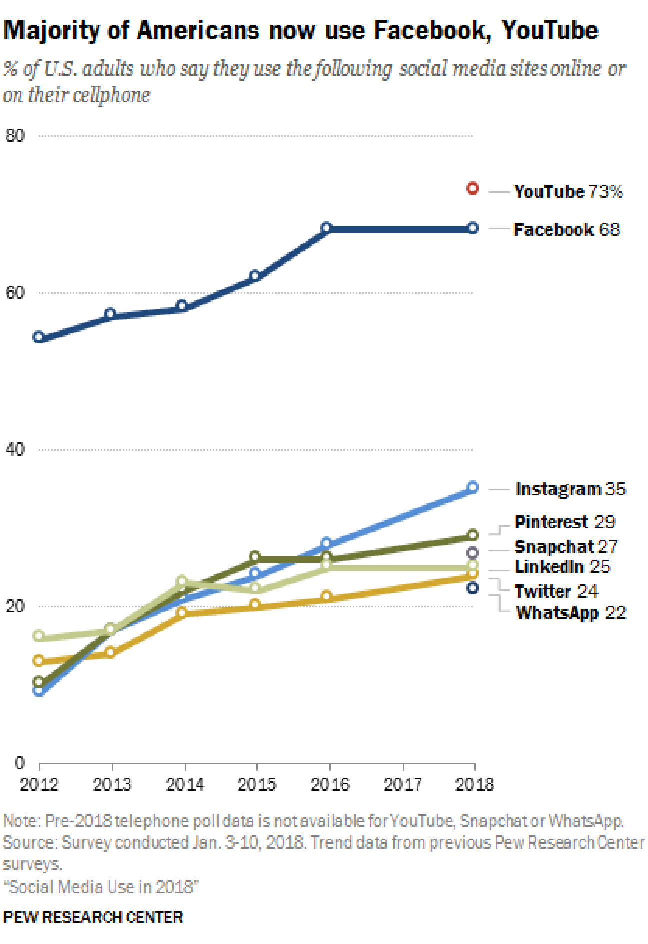
Instagram: A free photo and video sharing app that allows users to apply digital filters, frames and special effects to their photos and then share them on a variety of social networking sites.

Snapchat:- Snapchatis a mobile app, which gives the facility to easily talk with friends, view Live Stories from around the world, and explore news. It is used to share photos, videos, text, and drawings. It's free to download the app and free to send messages using it.The most interesting part of Snapchat is the short-lived components of all the content that gets shared on it. Photos and videos essentially disappear a few seconds after they've been viewed by their recipients.

LinkedIn Groups:- A place where groups of professionals with similar areas of interest can share information and participate in a conversation. LinkedIn is a business social networking site which allows its members to establish and document networks of people they know and trust professionally.It is used for exchanging knowledge, ideas, and employment opportunities.

The Role of social Media sites in Small Businesses

Social media is growing at rapidspeed.Social media is useful toincrease in awareness and inquiries, enhanced relationships with customers, an increase in the number of new customers, enhanced ability to reach customers on a global scale, and co-promotion of local businesses that enhance the image of small businesses. With more and more people joining social media sites and using them regularly,Social networking has become daily practice in user's lives. It's booming like never. A new Pew Research Center survey of U.S. adults finds that the social media landscape in early 2018 is defined by a mix of long-standing trends and newly emerging narratives. Facebook and YouTube dominate this statistics, as notable majorities of U.S. adults use each of these sites. But at the other side, younger Americans (especially those ages 18 to 24) stand out for embracing a variety of platforms and using them frequently. A huge percentage (Somewhere around 78%) of 18- to 24-year-olds use Snapchat. Similarly, 71% of Americans in this age group now use Instagram and close to half (45%) are Twitter users. These statistics undoubtedly prove thattoday'sbusiness needs to take benefits of these social media sites to keep up with the competition. Social media use on mobile devices is seeing a 30% growth every year.2 million business today use Facebook advertising for promoting their products and services.



Advantages

Let's now look into the importance of social media in business by analysing its advantages-

Social media advertising is growing faster than imagined. Take Facebook Ads for example. Even though the social network launched ads in 2005, it managed to reach 9.16B in ad revenue in the first quarter in 2017. This just goes on to show that social advertising is here to stay — for a long, long time. As more and more businesses successfully experiment with digital advertising, they're realizing that taking the social media advertising route makes total sense because –

Lower ad costs:- When compared to traditional advertising methods such as print media, TV and radio advertising, social ads are not only dependable, but also cheaper. What's more, you're allowed to engage on various social media channels for free before scaling with paid ads. You're free to grow on your own, at your own pace.

Targeted reach:- Traditional advertising doesn't give you the luxury to reach out to your target audience the way social media ads do. It simply doesn't work that way. When you're doing offline advertising, you're taking the blind, shotgun approach where your returns are dismal even if you're making big investments. Using social media ads you reach out to targeted prospects, increase your conversions and ultimately get a higher return on investment.

Real-time performance analysis:- Knowing if ad is working or not is integral in order to improve it. When we're doing any type offline advertising, we're unable to analyze the performance of your ad campaign. Which cripples massively cripples your efforts. Social media ads on the other hand allow us to constantly keep track of how well (or how bad) our ad is performing.post should also have something original, as it adds to our credibility.

Increase Inbound Traffic:- Inbound marketing is one of the most effective ways to generate targeted traffic to our website. It's the kind of traffic that actually converts because it's super relevant. However, if we leave to ignore the importance of social media in business, we will be limited to our inner circle of customers or the people that are already familiar with our market or brand.

Improve Search Engine Optimization:- Every seasoned social media marketer knows that there is some connection between social media and search engine optimization. While Google has clearly stated that it does take "social signals" into consideration when ranking a page, there's more to it.

Increase Conversion Rates:- Social media is great for capturing targeted leads for your business, but it doesn't stop there. Getting quality leads is only one part of the equation. The other part is converting those into sales.

Satisfy Your Customers:- Losing a customer is hard and gaining a new one is harder. But retaining an existing customer is 10 times easier. Which is why customer satisfaction should be your topmost priority. By using social media to connect with your customers, you have the opportunity monitor what they want, the problems they're facing and how you could serve them. In order to truly satisfy your customers and make their life easier, you need to offer them customer service that is more personalized and effective. And social media helps you do just that. Increasing customer satisfaction with social media includes:

Monitoring conversations to see if your customers are talking about your brand and in what context.

Broadcasting important messages, announcements and offers to customers via a social media platform such as Twitter.

Offering prompt customer service to customers who are facing genuine problems or need some help with the product or service.

Holding regular question & answer sessions with customers to understand their concerns, get real feedback and see how things can be improved.

Connect and build a relationship with power users or customer advocates so that they can help serve other customers.

Enhance Brand Loyalty: - A lot of businesses are stuck on their follower count, which is nothing but a vanity number. It doesn't serve a real purpose if the followers aren't loyal to your brand. There's a difference between a random follower and loyal one, because the latter adds real value.

Marketing Strategies In Indian Market Context

Small businesses can enhance brand recognition and profitability by using social media strategies:

Havinga Solid Social Media Strategy:- Social media platforms are evolving, and each has its own personality. Facebook is not Twitter, and Twitter is definitely not LinkedIn. Which means, you can't take the same old, outdated marketing and advertising methods and apply them to social media. You need to articulate a social media approach that clearly line up your goals with other areas such as content marketing, search engine optimization, etc. This should give you a fair idea of what type of value you can create for your loyal social media followers. It'll allow you to not only retain them but also help them spread the word.

Sharing Value-Oriented Content:- There's a reason why your followers are dependable and loyal to you. They're looking for value, which you will have to deliver at all times by sharing quality content. For example, sharing a comprehensive case study is much better way than a one word article. The more useful and relevant the content you post, the better. For example, visual content gets more shares than regular social media content. Which means you're free to use photos, videos, etc. as long as they add some value.

Being Consistent:- Your brand has aidentity in market, and certain aspects that are unique to it. By identifying these temperament and by bringing them out, it gets easier to connect to your target audience. You should be reliable and consistent in your approach and maintain the same voice throughout your interactions. The content that you create/share along with how you converse with others should reflect your brand's personality.

Responding to Queries:- One may not be a celebrity for his social media followers, but they do look up to you for answers. So when they approach you with a relevant query, you should get back to them with the right answers. This way they will know that you are the real deal. And you are doing a genuine business. But don't limit your answering exploits to your loyal followers.

Show the Human Side:- While it's okay to automate your social media posting with a tool like Buffer, it's not-so-okay to keep doing it. A lot of businesses try to present themselves as big corporations, this is making them fake and unreliable. People need people, not auto bots. That's the reason that you need to connect to them on a more personal level and involve in real conversations. Even if it's just for the sake of interacting.

Future Scope of Social Media

We cannot predict anything exactly in advance, but it is very clear and predictable about the future of social media, it will probably be more personalized and less noisy. We will be more efficient in filtering out inappropriate information. Snapchat is a social media platform that's really at the forefront of social media evolution. Rather than blasting out updates for all our friends and followers to see, we use Snapchatmore like we communicate in real life – with specific people only at specific times. Instagram has even now made the change toward short-lived content sharing with its Snapchat-like stories feature, so maybe more platforms will be in future to follow.And we will more efficiently use Social Media Marketing And Advertising for small businesses.

CONCLUSION

The role of social media in business can only be understood once we start applying the above discussed strategies. If done right, in the long run, social media marketing can prove to be really cost effective. Because in the present scenario, even the paid social media campaigns, such asFacebook Ads, are cheaper and effective than other advertising options such as search engine ads. Which means there's a higher return on investment. Jumping on the social media movement is no longer a matter of choice if you want to succeed. Your business needs it. Every business needs it. It's more needed than ever. A huge number of customers are already interacting with Brands through social media, and if a new or old (well established) company is not speaking directly to its customer through social platform like Facebook, Twitter, Instagram and Pinterest, it's missing something big!

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Tree of Thoughts: Deliberate Problem Solving with Large Language Models

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Abstract

Language models are increasingly being deployed for general problem solving across a wide range of tasks, but are still confined to token-level, left-to-right decision-making processes during inference. This means they can fall short in tasks that require exploration, strategic lookahead, or where initial decisions play a pivotal role. To surmount these challenges, we introduce a new framework for language model inference, "Tree of Thoughts" (ToT), which generalizes over the popular "Chain of Thought" approach to prompting language models, and enables exploration over coherent units of text ("thoughts") that serve as intermediate steps toward problem solving. ToT allows LMs to perform deliberate decision making by considering multiple different reasoning paths and self-evaluating choices to decide the next course of action, as well as looking ahead or backtracking when necessary to make global choices. Our experiments show that ToT significantly enhances language models' problem-solving abilities on three novel tasks requiring non-trivial planning or search: Game of 24, Creative Writing, and Mini Crosswords. For instance, in Game of 24, while GPT-4 with chain-of-thought prompting only solved 4% of tasks, our method achieved a success rate of 74%. Code repo with all prompts: `https://github.com/ysymyth/tree-of-thought-llm`.

1 Introduction

Originally designed to generate text, scaled-up versions of language models (LMs) such as GPT [22, 23, 1, 20] and PaLM [5] have been shown to be increasingly capable of performing an ever wider range of tasks requiring mathematical, symbolic, commonsense, and knowledge reasoning. It is perhaps surprising that underlying all this progress is still the original autoregressive mechanism for generating text, which makes token-level decisions one by one and in a left-to-right fashion. Is such a simple mechanism sufficient for a LM to be built toward a general problem solver? If not, what problems would challenge the current paradigm, and what should be alternative mechanisms?

The literature on human cognition provides some clues to answer these questions. Research on "dual process" models suggests that people have two modes in which they engage with decisions – a fast, automatic, unconscious mode ("System 1") and a slow, deliberate, conscious mode ("System 2") [27, 28, 13, 12]. These two modes have previously been connected to a variety of mathematical models used in machine learning. For example, research on reinforcement learning in humans and other animals has explored the circumstances under which they engage in associative "model free" learning or more deliberative "model based" planning [6]. The simple associative token-level choices of LMs are also reminiscent of "System 1", and thus might benefit from augmentation by a more deliberate "System 2" planning process that (1) maintains and explores diverse alternatives for current

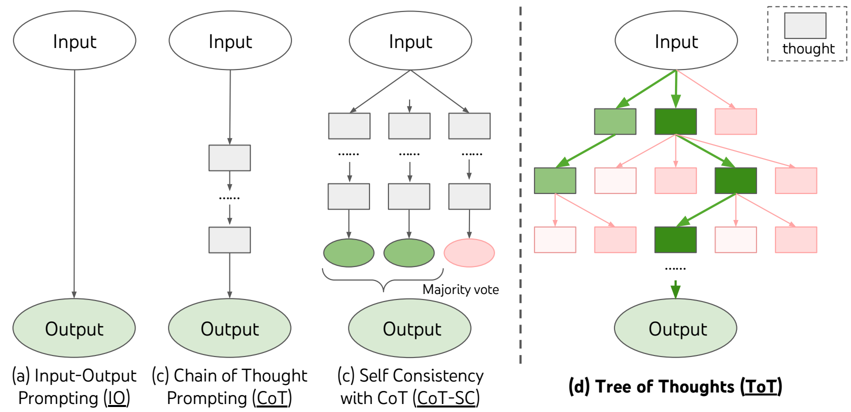

Figure 1: Schematic illustrating various approaches to problem solving with LLMs. Each rectangle box represents a *thought*, which is a coherent language sequence that serves as an intermediate step toward problem solving. See concrete examples of how thoughts are generated, evaluated, and searched in Figures 2,4,6.

choices instead of just picking one, and (2) evaluates its current status and actively looks ahead or backtracks to make more global decisions.

To design such a planning process, we return to the origins of artificial intelligence (and cognitive science), drawing inspiration from the planning processes explored by Newell, Shaw, and Simon starting in the 1950s [18, 19]. Newell and colleagues characterized problem solving [18] as search through a combinatorial problem space, represented as a tree. We thus propose the Tree of Thoughts (ToT) framework for general problem solving with language models. As Figure 1 illustrates, while existing methods (detailed below) sample continuous language sequences for problem solving, ToT actively maintains a tree of thoughts, where each *thought* is a coherent language sequence that serves as an intermediate step toward problem solving (Table 1). Such a high-level semantic unit allows the LM to self-evaluate the progress different intermediate thoughts make towards solving the problem through a deliberate reasoning process that is also instantiated in language (Figures 2,4,6). This implementation of search heuristics via LM self-evaluation and deliberation is novel, as previous search heuristics are either programmed or learned. Finally, we combine this language-based capability to generate and evaluate diverse thoughts with search algorithms, such as breadth-first search (BFS) or depth-first search (DFS), which allow systematic exploration of the tree of thoughts with lookahead and backtracking.

Empirically, we propose three new problems that challenge existing LM inference methods even with the state-of-the-art language model, GPT-4 [20]: Game of 24, Creative Writing, and Crosswords (Table 1). These tasks require deductive, mathematical, commonsense, lexical reasoning abilities, and a way to incorporate systematic planning or search. We show ToT obtains superior results on all three tasks by being general and flexible enough to support different levels of thoughts, different ways to generate and evaluate thoughts, and different search algorithms that adapt to the nature of different problems. We also analyze how such choices affect model performances via systematic ablations and discuss future directions to better train and use LMs.

2 Background

We first formalize some existing methods that use large language models for problem-solving, which our approach is inspired by and later compared with. We use p_θ to denote a pre-trained LM with parameters θ, and **lowercase letters** $x, y, z, s, \cdots$ **to denote a language sequence**, i.e. $x = (x[1], \cdots, x[n])$ where each $x[i]$ is a token, so that $p_\theta(x) = \prod_{i=1}^{n} p_\theta(x[i]|x[1...i])$. We use uppercase letters $S, \cdots$ to denote a collection of language sequences.

Input-output (IO) prompting is the most common way to turn a problem input x into output y with LM: $y \sim p_\theta(y|\texttt{prompt}_{IO}(x))$, where $\texttt{prompt}_{IO}(x)$ wraps input x with task instructions and/or few-shot input-output examples. For simplicity, let us denote $p_\theta^{\text{prompt}}(\texttt{output} \mid \texttt{input}) = p_\theta(\texttt{output} \mid \texttt{prompt}(\texttt{input}))$, so that IO prompting can be formulated as $y \sim p_\theta^{IO}(y|x)$.

Chain-of-thought (CoT) prompting [35] was proposed to address cases where the mapping of input x to output y is non-trivial (e.g. when x is a math question and y is the final numerical answer). The key idea is to introduce a chain of *thoughts* $z_1, \cdots, z_n$ to bridge x and y, where each z_i is a coherent language sequence that serves as a meaningful intermediate step toward problem solving (e.g. z_i could be an intermediate equation for math QA). To solve problems with CoT, each thought $z_i \sim p_\theta^{CoT}(z_i \mid x, z_{1\cdots i-1})$ is sampled sequentially, then the output $y \sim p_\theta^{CoT}(y|x, z_{1\cdots n})$. In practice, $[z_{1\cdots n}, y] \sim p_\theta^{CoT}(z_{1\cdots n}, y|x)$ is sampled as a continuous language sequence, and the **decomposition** of thoughts (e.g. is each z_i a phrase, a sentence, or a paragraph) is left ambiguous.

Self-consistency with CoT (CoT-SC) [33] is an ensemble approach that samples k i.i.d. chains of thought: $[z_{1\cdots n}^{(i)}, y^{(i)}] \sim p_\theta^{CoT}(z_{1\cdots n}, y|x)$ $(i = 1 \cdots k)$, then returns the most frequent output: $\arg\max_y \#\{i \mid y^{(i)} = y\}$. CoT-SC improves upon CoT, because there are generally different thought processes for the same problem (e.g. different ways to prove the same theorem), and the output decision can be more faithful by exploring a richer set of thoughts. However, within each chain there is no local exploration of different thought steps, and the "most frequent" heuristic only applies when the output space is limited (e.g. multi-choice QA).

3 Tree of Thoughts: Deliberate Problem Solving with LM

> *A genuine problem-solving process involves the repeated use of available information to initiate exploration, which discloses, in turn, more information until a way to attain the solution is finally discovered.—— Newell et al. [18]*

Research on human problem-solving suggests that people search through a combinatorial problem-space – a tree where the nodes represent partial solutions, and the branches correspond to operators that modify them [18, 19]. Which branch to take is determined by heuristics that help to navigate the problem-space and guide the problem-solver towards a solution. This perspective highlights two key shortcomings of existing approaches that use LMs to solve general problems: 1) Locally, they do not explore *different* continuations within a thought process – the branches of the tree. 2) Globally, they do not incorporate any type of planning, lookahead, or backtracking to help evaluate these different options – the kind of heuristic-guided search that seems characteristic of human problem-solving.

To address these shortcomings, we introduce *Tree of Thoughts (ToT)*, a paradigm that allows LMs to explore multiple reasoning paths over thoughts (Figure 1(c)). ToT frames any problem as a search over a tree, where each node is a **state** $s = [x, z_{1\cdots i}]$ representing a partial solution with the input and the sequence of thoughts so far. A specific instantiation of ToT involves answering four questions: 1. How to **decompose** the intermediate process into thought steps; 2. How to **generate** potential thoughts from each state; 3. How to heuristically **evaluate** states; 4. What **search** algorithm to use.

1. Thought decomposition. While CoT samples thoughts coherently without explicit decomposition, ToT leverages problem properties to design and decompose intermediate thought steps. As Table 1 shows, depending on different problems, a thought could be a couple of words (Crosswords), a line of equation (Game of 24), or a whole paragraph of writing plan (Creative Writing). In general, a thought should be "small" enough so that LMs can generate promising and diverse samples (e.g. generating a whole book is usually too "big" to be coherent), yet "big" enough so that LMs can evaluate its prospect toward problem solving (e.g. generating one token is usually too "small" to evaluate).

2. Thought generator $G(p_\theta, s, k)$**.** Given a tree state $s = [x, z_{1\cdots i}]$, we consider two strategies to generate k candidates for the next thought step:

(a) **Sample** i.i.d. thoughts from a CoT prompt (Creative Writing, Figure 4): $z^{(j)} \sim p_\theta^{CoT}(z_{i+1}|s) = p_\theta^{CoT}(z_{i+1}|x, z_{1\cdots i})$ $(j = 1 \cdots k)$. This works better when the thought space is rich (e.g. each thought is a paragraph), and i.i.d. samples lead to diversity;

(b) **Propose** thoughts sequentially using a "propose prompt" (Game of 24, Figure 2; Crosswords, Figure 6): $[z^{(1)}, \cdots, z^{(k)}] \sim p_\theta^{propose}(z_{i+1}^{(1\cdots k)} \mid s)$. This works better when the thought space is more constrained (e.g. each thought is just a word or a line), so proposing different thoughts in the same context avoids duplication.

3. State evaluator $V(p_\theta, S)$**.** Given a frontier of different states, the state evaluator evaluates the progress they make towards solving the problem, serving as a *heuristic* for the search algorithm to determine which states to keep exploring and in which order. While heuristics are a standard approach to solving search problems, they are typically either programmed (e.g. DeepBlue [3]) or learned (e.g. AlphaGo [26]). We propose a third alternative, by using the LM to deliberately reason about states. When applicable, such a deliberate heuristic can be more flexible than programmed rules, and more sample-efficient than learned models. Similar to the thought generator, we consider two strategies to evaluate states either independently or together:

(a) **Value** each state independently: $V(p_\theta, S)(s) \sim p_\theta^{value}(v|s)\ \forall s \in S$, where a value prompt reasons about the state s to generate a scalar value v (e.g. 1-10) or a classification (e.g. sure/likely/impossible) that could be heuristically turned into a value. The basis of such evaluative reasoning can vary across problems and thought steps. In this work, we explore evaluation via few *lookahead* simulations (e.g. quickly confirm that 5, 5, 14 can reach 24 via 5 + 5 + 14, or "hot_l" can mean "inn" via filling "e" in "_") plus commonsense (e.g. 1 2 3 are too small to reach 24, or no word can start with "tzxc"). While the former might promote "good" states, the latter could help eliminate "bad" states. Such valuations do not need to be perfect, and only need to be approximately

(b) **Vote** across states: $V(p_\theta, S)(s) = \mathbb{1}[s = s^*]$, where a "good" state $s^* \sim p_\theta^{vote}(s^*|S)$ is voted out based on deliberately comparing different states in S in a vote prompt. When problem success is harder to directly value (e.g. passage coherency), it is natural to to instead compare different partial solutions and vote for the most promising one. This is similar in spirit to a "step-wise" self-consistency strategy, i.e. cast "which state to explore" as a multi-choice QA, and use LM samples to vote for it.

For both strategies, we could prompt the LM multiple times to aggregate the value or vote results to trade time/resource/cost for more faithful/robust heuristics.

Algorithm 1 ToT-BFS($x, p_\theta, G, k, V, T, b$)

```
Require: Input x, LM p_θ, thought generator G() & size limit k, states evaluator V(), step limit T, breadth limit b.
  S_0 ← {x}
  for t = 1, ···, T do
      S'_t ← {[s, z] | s ∈ S_{t-1}, z_t ∈ G(p_θ, s, k)}
      V_t ← V(p_θ, S'_t)
      S_t ← arg max_{S ⊂ S'_t, |S|=b} Σ_{s∈S} V_t(s)
  end for
  return G(p_θ, arg max_{s∈S_T} V_T(s), 1)
```

Algorithm 2 ToT-DFS($s, t, p_\theta, G, k, V, T, v_{th}$)

```
Require: Current state s, step t, LM p_θ, thought generator G() and size limit k, states evaluator V(), step limit T, threshold v_th
  if t > T then record output G(p_θ, s, 1)
  end if
  for s' ∈ G(p_θ, s, k) do            ▷ sorted candidates
      if V(p_θ, {s'})(s) > v_thres then  ▷ pruning
          DFS(s', t + 1)
      end if
  end for
```

4. Search algorithm. Finally, within the ToT framework, one can plug and play different search algorithms depending on the tree structure. We explore two relatively simple search algorithms and leave more advanced ones (e.g. A* [9], MCTS [2]) for future work:

(a) **Breadth-first search (BFS)** (Algorithm 1) maintains a set of the b most promising states per step. This is used for Game of 24 and Creative Writing where the tree depth is limit ($T \leq 3$), and initial thought steps can be evaluated and pruned to a small set ($b \leq 5$).

(b) **Depth-first search (DFS)** (Algorithm 2) explores the most promising state first, until the final output is reached ($t > T$), or the state evaluator deems it impossible to solve the problem from the current s ($V(p_\theta, \{s\})(s) \leq v_{th}$ for a value threshold v_{th}). In the latter case, the subtree from s is *pruned* to trade exploration for exploitation. In both cases, DFS *backtracks* to the parent state of s to continue exploration.

Conceptually, ToT has several benefits as a method for general problem-solving with LMs: (1) *Generality.* IO, CoT, CoT-SC, and self-refinement can be seen as special cases of ToT (i.e. trees of limited depth and breadth; Figure 1). (2) *Modularity.* The base LM, as well as the thought decomposition, generation, evaluation, and search procedures can all be varied independently. (3) *Adaptability*. Different problem properties, LM capabilities, and resource constraints can be accommodated. (4) *Convenience.* No extra training is needed, just a pre-trained LM is sufficient. The next section will show how these conceptual benefits translate to strong empirical performance in different problems.

4 Experiments

We propose three tasks that are hard even when sampling from the state-of-the-art language model, GPT-4 [20], using standard IO prompting or chain-of-thought (CoT) prompting. We show how

	Game of 24	Creative Writing	5x5 Crosswords
Input	4 numbers (4 9 10 13)	4 random sentences	10 clues (h1. presented;..)
Output	An equation to reach 24 (13-9)*(10-4)=24	A passage of 4 paragraphs ending in the 4 sentences	5x5 letters: SHOWN; WIRRA; AVAIL; ...
Thoughts	3 intermediate equations (13-9=4 (left 4,4,10); 10-4=6 (left 4,6); 4*6=24)	A short writing plan (1. Introduce a book that connects...)	Words to fill in for clues: (h1. shown; v5. naled; ...)
#ToT steps	3	1	5-10 (variable)

Table 1: Task overview. Input, output, thought examples are in blue.

deliberate search in trees of thoughts (ToT) produces better results, and more importantly, interesting and promising new ways to use language models to solve problems requiring search or planning. Unless otherwise stated, we perform experiments using a Chat Completion mode GPT-4[1] with a sampling temperature of 0.7.

4.1 Game of 24

Game of 24 is a mathematical reasoning challenge, where the goal is to use 4 numbers and basic arithmetic operations (+-*/) to obtain 24. For example, given input "4 9 10 13", a solution output could be "(10 - 4) * (13 - 9) = 24".

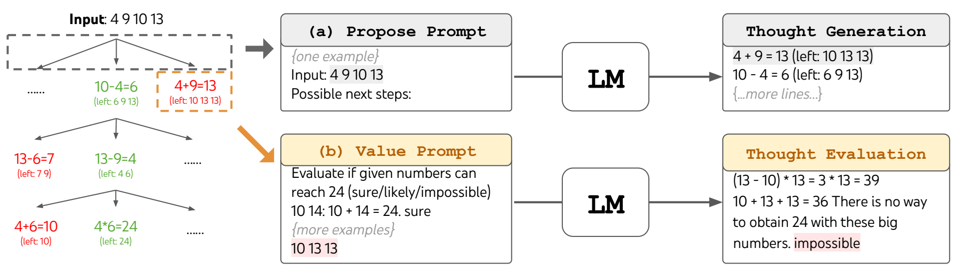

Figure 2: ToT in a game of 24. The LM is prompted for (a) thought generation and (b) valuation.

Task Setup. We scrape data from 4nums.com, which has 1,362 games that are sorted from easy to hard by human solving time, and use a subset of relatively hard games indexed 901-1,000 for testing. For each task, we consider the output as success if it is a valid equation that equals 24 and uses the input numbers each exactly once. We report the success rate across 100 games as the metric.

Baselines. We use a standard input-output (IO) prompt with 5 in-context examples. For chain-of-thought (CoT) prompting, we augment each input-output pair with 3 intermediate equations, each operating on two remaining numbers. For example, given input "4 9 10 13", the thoughts could be "13 - 9 = 4 (left: 4 4 10); 10 - 4 = 6 (left: 4 6); 4 * 6 = 24 (left: 24)". For each game, we sample IO and CoT prompting for 100 times for average performance. We also consider a CoT self-consistency baseline, which takes the majority output from 100 CoT samples, and an iterative-refine approach on top of an IO sample for at most 10 iterations. At each iteration, the LM is conditioned on all previous history to "reflect on your mistakes and generate a refined answer" if the output is incorrect. Note that it uses groundtruth feedback signals about equation correctness.

ToT Setup. To frame Game of 24 into ToT, it is natural to decompose the thoughts into 3 steps, each an intermediate equation. As shown in Figure 2(a), at each tree node, we exact the "left" numbers and prompt the LM to propose some possible next steps. The same "propose prompt" is used for all 3 thought steps, though it only has one example with 4 input numbers. We perform a breadth-first search (BFS) in ToT, where at each step we keep the best $b = 5$ candidates. To perform deliberate BFS in ToT, as shown in Figure 2(b), we prompt LM to evaluate each thought candidate as "sure/maybe/impossible" with regard to reaching 24. The aim is to promote correct partial solutions that can be verdicted within few lookahead trials, and eliminate impossible partial solutions based on "too big/small" commonsense, and keep the rest "maybe". We sample values 3 times for each thought.

[1]Experiments were done between May 5-16, 2023.

Method	Success
IO prompt	7.3%
CoT prompt	4.0%
CoT-SC (k=100)	9.0%
ToT (ours) (b=1)	45%
ToT (ours) (b=5)	**74%**
IO + Refine (k=10)	27%
IO (best of 100)	33%
CoT (best of 100)	49%

Table 2: Game of 24 Results.

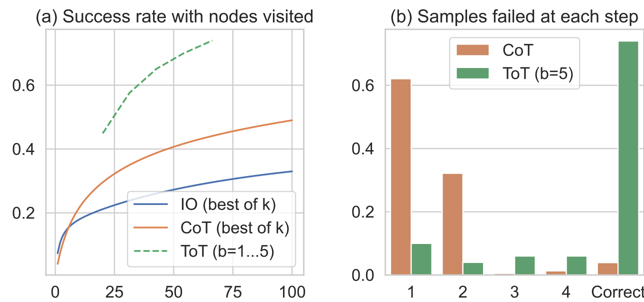

Figure 3: Game of 24 (a) scale analysis & (b) error analysis.

Results. As shown in Table 2, IO, CoT, and CoT-SC prompting methods perform badly on the task, achieving only 7.3%, 4.0%, and 9.0% success rates. In contrast, ToT with a breadth of $b = 1$ already achieves a success rate of 45%, while $b = 5$ achieves 74%. We also consider an oracle setup for IO/CoT, by calculating the success rate using best of k samples $(1 \leq k \leq 100)$. To compare IO/CoT (best of k) with ToT, we consider calculating the tree nodes visited per task in ToT across $b = 1 \cdots 5$, and map the 5 success rates in Figure 3(a), treating IO/CoT (best of k) as visiting k nodes in a bandit. Not surprisingly, CoT scales better than IO, and best of 100 CoT samples achieve a success rate of 49%, but still much worse than exploring more nodes in ToT ($b > 1$).

Error Analysis. Figure 3(b) breaks down at which step CoT and ToT samples fail the task, i.e. the thought (in CoT) or all b thoughts (in ToT) are invalid or impossible to reach 24. Notably, around 60% of CoT samples already failed the task after generating the first step, or equivalently, the first three words (e.g. "$4 + 9$"). This highlights the issues with direct left-to-right decoding.

4.2 Creative writing

Next, we invent a creative writing task where the input is 4 random sentences and the output should be a coherent passage with 4 paragraphs that end in the 4 input sentences respectively. Such a task is open-ended and exploratory, and challenges creative thinking as well as high-level planning.

Task setup. We sample random sentences from randomwordgenerator.com to form 100 inputs, and there is no groundtruth passage for each input constraint. As we find that GPT-4 can follow the input constraints most of the time, we focus on evaluating passage coherency in two ways: using a GPT-4 zero-shot prompt to provide a 1-10 scalar score, or using human judgments to compare pairs of outputs from different methods. For the former, we sample 5 scores and average them for each task output, and we find these 5 scores usually consistent, with a standard deviation of around 0.56 on average across outputs. For the latter, we employ a subset of the authors in a blind study to compare the coherency of CoT vs. ToT generated passage pairs, where the order of passages is random flipped over 100 inputs.

Baselines. Given the creative nature of the task, both IO and CoT prompts are zero-shot. While the former prompts the LM to directly generate a coherent passage given input constraints, the latter prompts the LM to first make a brief plan then write the passage, i.e. the plan serves as the intermediate thought step. We generate 10 IO and CoT samples per task. We also consider an iterative-refine ($k \leq 5$) method on top of a random IO sample for each task, where the LM is conditioned on input constraints and the last generated passage to decide if the passage is already "perfectly coherent", and if not generate a refined one.

ToT setup. We build a ToT with depth 2 (and only 1 intermediate thought step) — the LM first generates $k = 5$ plans and votes for the best one (Figure 4), then similarly generate $k = 5$ passages based on the best plan then vote for the best one. Here the breadth limit $b = 1$, as only one choice is kept per step. A simple zero-shot vote prompt ("analyze choices below, then conclude which is most promising for the instruction") is used to sample 5 votes at both steps.

Results. Figure 5(a) shows average GPT-4 scores across 100 tasks, where ToT (7.56) is deemed to generate more coherent passages than IO (6.19) and CoT (6.93) on average. While such an automatic metric might be noisy, Figure 5(b) confirms the finding by showing that humans prefer ToT over CoT in 41 out of 100 passage pairs, while only prefer CoT over ToT in 21 (other 38 pairs are found "similarly coherent"). Lastly, iterative-refine is more effective on this natural language task, where

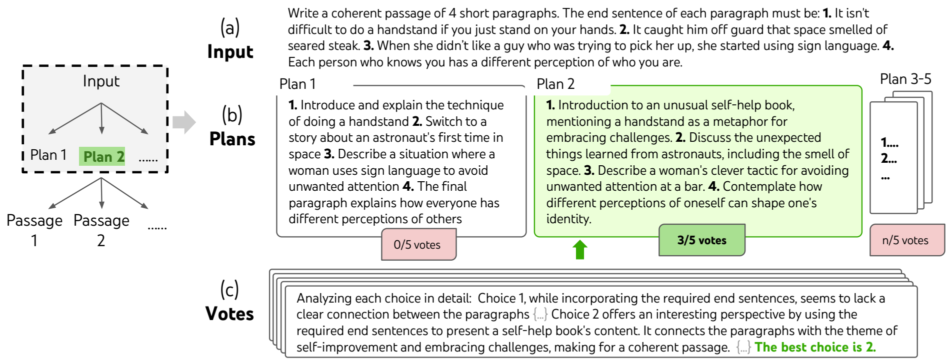

Figure 4: A step of deliberate search in a randomly picked Creative Writing task. Given the input, the LM samples 5 different plans, then votes 5 times to decide which plan is best. The majority choice is used to consequently write the output passage with the same sample-vote procedure.

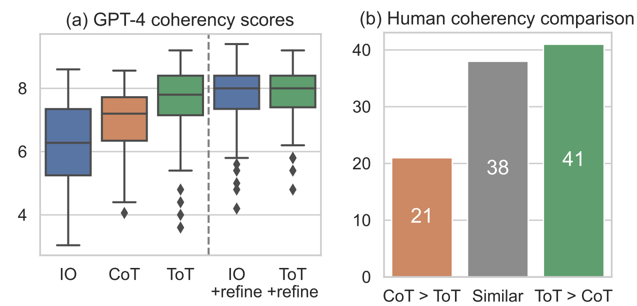

Figure 5: Creative Writing results.

Method	Success Rate (%)		
	Letter	Word	Game
IO	38.7	14	0
CoT	40.6	15.6	1
ToT (ours)	**78**	**60**	**20**
+best state	82.4	67.5	35
-prune	65.4	41.5	5
-backtrack	54.6	20	5

Table 3: Mini Crosswords results.

it improves IO coherency score from 6.19 to 7.67, and ToT coherency score from 7.56 to 7.91. We believe it could be thought of as a third approach to thought generation in the ToT framework, where new thoughts can arise from refining old thoughts instead of i.i.d. or sequentially generated.

4.3 Mini Crosswords

In Game of 24 and Creative Writing, ToT is relatively shallow — at most 3 thought steps are needed to reach the final output. Here we explore 5×5 mini crosswords as a harder search problem involving natural language. Again, the goal is not just to solve the task, as more general crosswords can be readily solved with specialized NLP pipelines [31] that leverages large-scale retrieval instead of LM. Rather, we aim to explore the limit of LM as a general problem solver that explores its own thoughts and guides its own exploration with deliberate reasoning as heuristics.

Task Setup. We scrape data from GooBix, which contains 156 games of 5×5 mini crosswords. As we observe adjacent games contain similar clues, we use 20 games with indices $1, 6, \cdots, 91, 96$ for testing, and games $136, 141, 146, 151, 156$ for prompting. For each task, the input describes the 5 horizontal clues and 5 vertical clues, and the output should be a board of $5 \times 5 = 25$ letters to solve the crosswords. For evaluation, we consider three levels of success: the portion of correct letters (25 per game), words (10 per game), and games.

Baselines. We provide 5 example input-output pairs in the IO prompt, and in the CoT prompt additionally include intermediate words in the order h1..5 then v1..5. We run each prompt for 10 samples and average the results.

ToT Setup. We leverage a depth-first search (Algorithm 2) that keeps exploring the most promising subsequent word clue until the state is no longer promising, then backtrack to the parent state to explore alternative thoughts. To make search tractable, subsequent thoughts are constrained not to change any filled words or letters, so that the ToT has at most 10 intermediate steps. For thought generation, at each state we translate all existing thoughts (e.g. "h2.motor; h1.tasks" for the state in Figure 6(a)) into letter constraints for remaining clues (e.g. "v1.To heap: tm___;...") and prompt a proposal prompt 5 times to come up with candidates for where and what to fill in the next word. Importantly, we also prompt the LM to give a confidence level for different thoughts, and aggregate

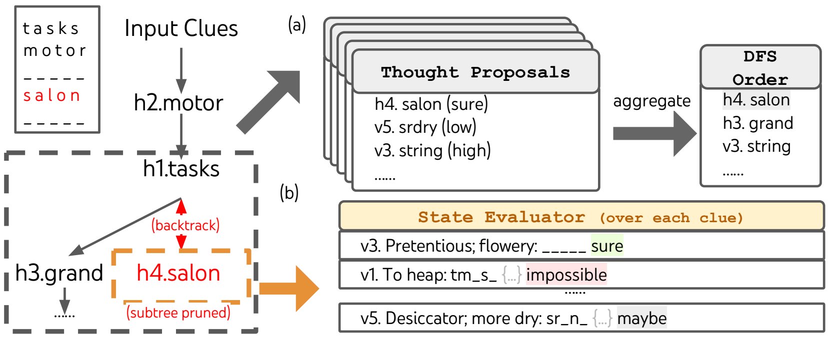

Figure 6: In Mini Crosswords, (a) how thoughts are proposed and aggregated in a priority queue for depth-first search (DFS), and (b) how a state is evaluated based on the possibility of filling in each remaining word clue, and pruned if any remaining clue is deemed not possible to fill by the LM. Then DFS backtracks to the parent state and explore the next promising thought for clue.

these across proposals to obtain a sorted list of next thoughts to explore (Figure 6(a)). For state evaluations, we similarly translate each state into letter constraints for remaining clues, then evaluate for each clue if it is possible to fill given the constraints. If any remaining clue is deemed "impossible" to fill in (e.g. "v1. To heap: tm_s_"), then the exploration of the state's subtree is pruned and DFS backtracks to its parent to explore the next promising thought. We limit DFS search steps to 100, and simply render the deepest explored state (the first explored one if multiple) into the final output.

Results. As shown in Table 3, IO and CoT prompting methods perform poorly with a word-level success rate less than 16%, while ToT significantly improves all metrics, achieving a word-level success rate of 60% and solving 4 out of 20 games. Such an improvement is not surprising, given IO and CoT lack mechanisms to try different clues, make changes to decisions, or backtrack.

Oracle and ablation studies. When outputting from the oracle best DFS state (instead of the heuristically determined best state) per task, ToT performance is even higher and actually solves 7/20 games (Table 3, "+best state"), indicating our simple output heuristics can be readily improved. Interestingly, sometimes when the crosswords game is actually solved, the state evaluator might still deem some words as "impossible" and prune — possibly because 5×5 crosswords by design have some rare or obselete words that GPT-4 cannot recognize[2]. Given the state evaluation as a pruning heuristic is imperfect, we also explore ablating the pruning, and find the performance generally worse (Table 3, "-prune"). However, it could actually find the correct solution for 4/20 games (though only outputting 1 via heuristic), 3 of which are games ToT+pruning cannot solve within 100 steps. Thus, better heuristics for DFS pruning are critical for problem solving in this case. Lastly, we confirm the importance of backtracking by running an ablation that keeps filling the most promising clue for at most 20 steps, allowing overwrites. This is similar to a "greedy" BFS search with breadth limit of $b = 1$, and performs poorly with a word level success of only 20% (Table 3, "-backtrack").

5 Related Work

Planning and decision making. Smart planning and decision making are critical to achieving predefined goals. As they are trained on vast amount of world knowledge and human examples, LMs are known to have already absorbed rich commonsense that makes it possible to propose reasonable plans conditioned on problem setting and environmental states [10, 39, 34, 11, 32, 38, 37]. Our proposed Tree-of-Thought approach extends existing planning formulations by considering multiple potentially feasible plans simultaneously at each problem-solving step, and proceeding with the most promising ones. The integration between thought sampling and value feedback organically integrates planning and decision-making mechanisms, enabling effective search inside a solution tree. On the other hand, traditional decision-making procedures usually require training dedicated reward and policy models as in reinforcement learning (for example CHAI [30]), whereas we use the LM itself to provide the value estimates for decision making.

[2] For example, "agend" is an obsolete form of "agendum", but GPT-4 deems it a typo for "agenda". External retrieval or web interaction could augment LM for problem solving under knowledge uncertainty.

Self-reflection. Using LLMs to assess the viability of their own predictions is becoming an increasingly important procedure in problem solving. [25, 17, 21] introduced the "self-reflection" mechanism, in which LMs provide feedback to their generation candidates. [4] improves LMs code generation accuracy by injecting feedback messages generated by the LM itself based on its code execution results. Similarly, [14] also introduces "critic" or review steps over the actions and states, deciding the next action to take in solving computer operation tasks. Another recent work very relevant to ours is "self-eval guided decoding" [36]. Similar to our method, self-eval decoding also follows a tree-search procedure with leaves sampled from stochastic beam search decoding, which are then evaluated by LLM itself with carefully prepared self-eval prompts. Their approach however, uses the PAL formulation [7] which represents thoughts as codes, which makes it difficult to tackle challenging tasks like creative writing which we consider in this paper. Our Tree-of-Thought formulation is thus more versatile and handles challenging tasks on which GPT-4 only achieves very low accuracy with standard prompts.

Program-guided LLM generation. Our proposal is also related to recent advancements that organize LM's behavior with symbolic program guidance. For example [24] embeds LMs in an algorithmic search procedure to help solve problems like question answering step-by-step, in which the search trees are expanded by relevant paragraphs that might provide answers. This approach however differs from ours in that trees are expanded by sampling external paragraphs instead of the LM's own thoughts, and there is no reflection or voting steps. Another approach, LLM+P [15], goes one step further and delegates the actual planning process to a classical planner.

Classical search methods. Last but not least, our approach can be treated as a modern rendition of classical search methods for problem solving. For example it can be considered as a heuristic search algorithm like A* [8], in which the heuristic at each search node is provided by the LM's self-assessment. From this perspective, our method is also related to NeuroLogic A*esque decoding proposed in [16], which is inspired by A* search but introduces look-ahead heuristics that are efficient for LMs to improve the beam-search or top-k sampling decoding. This method however is constrained to sentence generation tasks, whereas our framework are designed for complex, multi-step problem solving guarded by value feedback.

6 Discussion

Limitations and future directions. Deliberate search such as ToT might not be necessary for many existing tasks that GPT-4 already excels at, and as an initial step this work only explores three relatively simple tasks that challenges GPT-4 and calls of better search and planning abilities incorporated with LMs. However, as we begin to deploy LMs for more real-world decision making applications (e.g. coding, data analysis, robotics, etc.), more complex tasks could emerge and present new opportunities to study these research questions. Also, search methods like ToT requires more resources (e.g. GPT-4 API cost) than sampling methods in order to improve task performances, but the modular flexibility of ToT allows users to customize such performance-cost tradeoffs, and ongoing open-source efforts [29] should readily reduce such costs in the near future. Lastly, this work focuses on using an off-the-shelf LM, and fine-tuning LMs using a ToT-style high-level counterfactual decision making (e.g. deliberating over potential choices for the next paragraph, instead of predicting the next token) might present opportunities to enhance the problem-solving capabilities of LMs.

Broader impact. ToT is a framework that empowers LMs to more autonomously and intelligently make decisions and solve problems. While current tasks are limited to reasoning and search problems, future applications involving interaction with external environments or humans could bring potential danger, e.g. facilitating harmful uses of LMs. On the other hand, ToT also improves the interpretability of model decisions and the opportunity for human alignment, as the resulting representations are readable, high-level language reasoning instead of implicit, low-level token values.

Conclusion. The associative "System 1" of LMs can be beneficially augmented by a "System 2" based on searching a tree of possible paths to the solution to a problem. The Tree of Thoughts framework provides a way to translate classical insights about problem-solving into actionable methods for contemporary LMs. At the same time, LMs address a weakness of these classical methods, providing a way to solve complex problems that are not easily formalized, such as creative writing. We see this intersection of LMs with classical approaches to AI as an exciting direction for future work.

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Master's thesis

"An analysis of internationalization strategies in the apparel industry: How companies create a competitive advantage in culturally different markets"

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"International Management and Intercultural Communication"

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Abstract

The research in this thesis illustrates that retailing companies in the apparel industry, like H&M AB and Inditex, are faced with the complexity of culturally different markets. Four key business areas are selected as a basis for the analysis, namely market entry, brand positioning, promotion, and product adaptation, and are examined in the context of the German, Chinese, and US-American markets. The strategies adopted in these four business areas and in these three countries serves as the outline for a comparison of the two firms. In conclusion can be said that both brands aim to standardize and implement a global strategy but adapt to the business environment, consumer behavior, and cultural perceptions when it is necessary to create and sustain a competitive advantage. Several cases of best practices are given for the consideration of companies that also want to enter culturally different markets in the apparel industry.

Table of contents

List of abbreviations

CEO	Chief of Executive Officer
CMO	Chief of Marketing Officer
EU	European Union
EUR	Euros
GPA	Government Procurement Agreement
H&M	Hennes & Mauritz
H&M AB	H & M Hennes & Mauritz AB
HQ	Headquarters
ITC	International Trade Center
Mio.	Million
PR	Public Relations
PTA	Preferential Trading Agreements
RMB	Ren Min Bi
TPP	Trans-Pacific Partnership
TTIP	Transatlantic Trade and Investment Partnership
US	United States
USA	United States of America
USD	United States Dollars
WTO	World Trade Organization

List of figures

List of tables

1 Introduction

1.1 Background and problem statement

Retailing companies in the apparel industry, like H & M Hennes & Mauritz AB (H&M AB) and Inditex, are not only faced with the complexity of international trade relations. They are also faced with the challenge of catering to global consumers with different backgrounds, languages, and cultural perceptions (Cateora & Graham, 2007, p. 403). Especially in the clothing and fashion markets, personal preferences and taste are critical for the buying decision. Distinctions in climate, culture, and physiology demand adaptation to each market (Cateora & Graham, 2007, p. 403). For example, German consumers have a stronger preference for natural fabrics than consumers in the Netherlands (Cateora & Graham, 2007, p. 403).

Companies which operate on a global scale are not only faced with various customer expectations but also with different marketing and advertisement channels, as well as cultural meaning attached to communication (Schultz & Kitchen, 2000, p. 46). While marketing communication sends the intended message, receivers decode the received meaning according to their cultural conditioning (Schultz & Kitchen, 2000, p. 46). Successful marketing in international markets relies heavily on the right amount and methods of adaptation. However, standardization of marketing materials tends to be cheaper and easier to manage. Firms need to engage in multicultural research to determine to what extent an adjustment of their global strategy is necessary in each market (Cateora & Graham, 2007, p. 229). This decision impacts not only marketing expenses, but ultimately the match or mismatch of the brand and products with the targeted consumers.

This paper examines current practices within “the old issue of adaptation versus standardization” (Schultz & Kitchen, 2000, p. 209) in one of the most global industries. The topic is not only relevant in the apparel industry but also shows how essential this discussion is regarding competitiveness in the global marketplace. The resources invested in the research of cultural aspects in the beginning of international projects are important to determine whether this additional market will add value considering the current business model (Doole & Lowe, 2004, p. 99). Lack of knowledge of foreign markets is one of the first barriers managers have to overcome (Doole & Lowe, 2004, p. 99). Retailers like Wal-Mart have failed with their investments because they underestimated the differences between the German and their home market (US) (Christopherson, 2007, p. 451). In the US, Walmart's business model created a comparative advantage for them, but due to the different customer expectations and regulations, Walmart was not able to build on the competitive advantages in the same way in Germany (Christopherson, 2007, p. 451).

Therefore, the decision of standardization and adaptation is not only relevant for a market but, as this paper shows, for the global firm to stay overall competitive. The results of research also show how companies think about international consumers in terms of the cultural convergence-divergence debate, and how they leverage global and cross-national trends to gain a competitive advantage in international markets.

1.2 Research objectives

This study primarily aims to examine the strategies employed by two major apparel firms to cater to culturally different markets, and how much adaptation each of them pursues in the three significantly dissimilar countries, namely Germany, China, and the United States of America (US). Four key areas within the internationalization process serve as the basis for a comparison. Therefore, the analysis is multi-layered, as it includes the aspects of two firms, three markets, and four key areas of the business process.

This paper intends to investigate best practices of some of the biggest players in the global apparel market: the Spanish firm Inditex and the Swedish firm H&M AB, with a special focus on their brands Zara and Hennes & Mauritz (H&M), respectively. The analysis reveals the strategic decisions of these two European retailers, which are often directly competing in the apparel market. The juxtaposition of these companies has been driven by the fact that both (1) expand globally, (2) excel in offering affordable yet fashionable, in-season collections, and (3) target similar market segments across a multitude of countries around the world.

The goal is to draw concrete conclusions in form of best practices that offer evidence of how global firms act in the context of "global integration and local responsiveness" (Cateora & Graham, 2007, p. 312). The choices made by companies in this context can lead them to gain a competitive advantage or fail in international markets. Apparel retailers operating in and entering new markets can benefit from the findings of the research, and can learn from the best practices that are outlined. Marketing professionals can also use the country-specific sections on China, Germany, and the US to gain insights about cultural and market factors that are unique to these countries. Therefore, this cross-cultural comparison in the apparel retail market, will contribute to the research of international marketing strategy and intercultural marketing communication.

Many business operations contribute to the success of a firm and its competitive advantage. Because the focus of this paper is on cultural dimensions in global markets, the analysis focuses on the business areas which are the most affectedt. Generally, direct interaction with the customer requires more cultural sensitivity than e.g. logistical operations. Especially in the apparel retail industry, factors like brand image and product management play an important role. Therefore, the four most interesting focus areas of research were identified to be market entry, brand positioning, promotion, and product adaptation.

In scientific literature, these areas are recognized as key to success or failure of a company's international marketing strategy. In their book “International Marketing Strategy”, Doole and Lowe (2004) include market entry strategies and international product and service management (which includes branding and product adaptation) as part of strategy development. International communication is part of implementation (Doole & Lowe, 2004, p. ix). The authors stress that in practice, there can be substantial overlap between analysis, strategy development, and implementation, and that organizations themselves decide which areas are grouped together (Doole & Lowe, 2004, p. xvii). In Cateora and Graham's work “International Marketing” (2007, p. xix), our four areas of research are also represented, and are in the part “Developing Global Marketing Strategies”. Therein, the chapter “International Marketing Channels” treats the topic of market entry and “Products and Services for Consumers” includes brand positioning and product adaptation (Cateora & Graham, 2007, p. xix). Promotional theories and practices can be found in “Integrated Marketing Communications and International Advertising” (Cateora & Graham, 2007, p. xix). This short literature assessment is to show that the four areas of research selected are considered highly important for a company striving to gain a competitive advantage when entering a foreign market.

First, the form of market entry is usually the most significant decision a company must make since it affects all future aspects of the business (Doole & Lowe, 2004, p. 217). It can also be a signal to competitors about the company's intent, and shape the competitive environment (Douglas & Craig, 1997). This paper examines H&M and Zara's market entry strategy under the aspect of adaptation to business environment and culture. Depending on the existence of a consistent global strategy, the mode of entry may or may not vary by country. Higher levels of involvement and direct investment carry a higher risk for the firm but also offer more control over quality and brand image (Doole & Lowe, 2004, p. 219). More importantly, the international implementation of the chosen market entry strategy will determine whether the company can create and maintain a competitive advantage in the market.

Second, brand positioning of the firms is strongly linked to the competitive environment and market conditions in each country's apparel market. Therefore, the image and positioning of the brand can differ from market to market. According to Schultz and Kitchen (2000, p. 103), the "definition of a brand is primarily based on the idea that it is the relationship between the buyer and seller." Brand positioning therefore depends on customer perception which is shaped by history, meaning, shared understandings, and prospects for the future (Schultz & Kitchen, 2000, p. 103). As both companies in this paper established global brands, they use a "worldwide name, term, sign, symbol (visual and/or auditory), design, or combination thereof intended to identify goods (…) and to differentiate them from (…) competitors." (Cateora & Graham, 2007, p. 361). Besides the brand, global companies also must price their products competitively and provide real consumer value (Cateora & Graham, 2007, p. 366). The fact that a standard product may be an innovative, trendy piece in another market is critical, and the company's understanding thereof might lead to different decisions when positioning the brand in each market (Cateora & Graham, 2007, p. 366). This paper examines the overall market segment, and whether H&M and Zara adapt their brand positions or are consistent with the target and price segment in each country.

Third, promotion, which includes several advertisings as well as communication methods, is a key component in the company's internationalization strategy. There are many examples of marketing blunders that were caused by unawareness of the country's language(s) or cultural symbols (Doole & Lowe, 2004, p. 298). The effectiveness and success of promotion is strongly influenced by understanding the culture of each market. Globalization and converging consumer behavior are an advantage to global promotional campaigns, which have worked well within trading blocs, like North America and the European Union (EU), or across homogenous segments in global markets (Schultz & Kitchen, 2000, p. 38). Even though the company owns the brand and controls the messages that are sent, the consumers assemble these messages and interpret them according to their own frameworks which can lead to misunderstandings (Schultz & Kitchen, 2000, p. 103). As mentioned, the convergence and standardization debate from the 1980s has turned into the discussion of "global integration versus local responsiveness" (Cateora & Graham, 2007, p. 312). In promotional activities, global companies are faced with two major challenges: the degree of integration of all marketing channels worldwide, and the most suitable balance of adaptation to the local market (Schultz & Kitchen, 2000, p. 38f). This paper will highlight how H&M and Zara approach promotion, how they execute a global strategy, and whether specific activities are implemented to reach culturally different markets.

Fourth, apparel products are the source of revenue for apparel companies. There are three important aspects related to the product that should be considered when catering to the customer: product benefits, product attributes, and marketing support services (Doole & Lowe, 2004, p. 254). In this paper, we focus on product attributes but also stress the fact that cultural influences are interwoven with the product (Cateora & Graham, 2007, p. 343). How much adaptation of the assortment and the actual products are necessary depends on the cultural differences between the market they were primarily developed for, and the new target market (Cateora & Graham, 2007, p. 343). The combination of China, Germany, and the US can offer interesting examples of adaptation. As both brands are global, it can also be determined whether they create a competitive advantage by either adapting products for each market or not. Many critical buying decisions in apparel retail are made per personal taste, but companies can draw overall conclusions of taste based on culture, climate, and physiology. Examples from primary and secondary sources reveal the internationalization strategies of H&M and Zara in the aspect of product adaptation.

1.3 Methodology

The methodology used is mainly based on qualitative research methods and draws on international market theory. Qualitative studies offer the advantage of not imposing pre-specified conceptual models on the international marketing research but are rather helpful in examining the context of the environment and consumer behavior in each market. In addition, as qualitative techniques are often observational, they are particularly suited for research in dynamic markets, and provide insights into the role of culture and best practice.

The validity of research findings in the apparel retail industry is often short-lived since the whole industry has to keep up with ever-changing trends. Especially brands which can be grouped in the sector of fast-fashion, like H&M and Zara, change campaigns and styles very frequently. Information and pictures of previous collections, promotional materials, or shop window settings, are often not documented or publicly available, unless a third party published images online. Therefore, most pictures in this paper are taken first hand and are serve as primary sources.

Interviews and articles from industry experts are often published in online magazines. Therefore, due to the topic, parts of this work rely more strongly on online sources and articles from newspapers or fashion magazines, than conventional scientific research. Additionally, email correspondence and interviews with employees serve as a primary and reliable source.

1.4 Thesis structure

After introducing the topic and formulating the objectives in the first chapter, the second chapter examines the overall apparel industry, which will lead to an understanding about how both firms' business model and strategies are shaped by this environment. The third chapter offers a review on culture and cross-cultural consumer behavior which serves as the basis for the further analysis.

The fourth and fifth section analyze H&M and Zara, respectively. The description of the global business model will examine aspects such as market participation, value-chains, marketing and production management, which will be essential for the later comparison of firms and the strategies they implemented in the different countries considered. Then, the four selected key business areas of market entry, brand positioning, promotion, and product adaptation are evaluated. The use of practical cases, primary data, and secondary literature reveals the degree of cultural and market adaptation the firm used in the US, Chinese, and German market.

The sixth chapter provides a comparison between the internationalization strategies of the firms H&M and Inditex by highlighting significant differences. It also investigates why different strategies were chosen when expanding to a specific market and what cultural factors influenced these decisions. This section provides the results of the research which are used for the concluding section, the seventh chapter. Therein, best practices and common trends are regarded as the practical application derived from this thesis and relevant results for businesses in international apparel retailing. A special focus is put on identifying strategies that successfully adapted to the culture of the target market.

example, traffic in any shopping center increases by ten percent when an H&M store opens (Hansegard & Burkitt, 2013). They are competing in these areas with national and international retailers.

Foreign retailers compete with H&M because China is an enormous market and many competitors are fighting for a share in it. H&M is competing against Inditex's Zara chain. As of July 2016, Zara has 181 stores in the Chinese market (Inditex, 2016a). Fast Retailing Co.'s Uniqlo opened its largest flagship store in the world in 2013 and has plans to continue rapid expansion (Hansegard & Burkitt, 2013, para. 13). Gap, Inc. has also been tapping into the rising income in China by adding more stores to the Chinese market (Fickling & Lin, 2014).

H&M has a similar brand position to other multinational apparel retailers expanding and entering the market in China. The government has hurt some of the luxury brand business, such as Prada SpA and LVMH Moet Hennessy Vuitton SA. H&M has not been hurt by the government policies which indicates that their position is different from luxury-goods producers (Fickling & Lin, 2014, para. 9).

In conclusion, H&M is positioned a segment similar to other foreign retailers in China. However, according to the evidence discussed above, not all foreign retailers are in the same market segment. For example, H&M does not compete with the luxury fashion segment but with a cheaper foreign retailer. The rising wages in the Chinese market have allowed more competitors to enter the market to sell instead of just produce clothing. H&M is growing in the Chinese market by opening new stores and drawing attention to the areas where they are located.

4.2.3 Promotion

This section points out which marketing and promotional tools H&M uses globally and then which ones are more specifically used in the German, US, and Chinese market. After analyzing promotional campaigns and various marketing materials in the three countries, it will be possible to argue that H&M runs a global marketing strategy but does make some adaptations in each market.

Promotional campaigns by H&M are created in its headquarters (HQ) in Stockholm, Sweden, and then distributed and used in their 63 different markets. The marketing department aims to keep print advertisements simple and straightforward, and states to inform customers about new products (H&M Hennes and Mauritz AB, 2016a, para. 2). According to H&M's website, they use "Responsible marketing" in which they "don't aim to communicate any specific ideal, but rather a large range of styles and attitudes." Their print campaigns have a uniform layout which includes models wearing H&M's season designs and the price of the product (H&M, 2016a, para. 3). These advertisements are largely identical across markets, "(…) but the media strategy is adapted to local requirements and conditions." (H&M Hennes and Mauritz AB, 2016a, para. 3).

Therefore, H&M's promotional activities and ways of customer involvement include five major channels that are representative for H&M's basic promotional activities worldwide: (a) Direct marketing through catalog and email newsletters, (b) social media marketing through Facebook, Twitter, Instagram, YouTube, Google+, Pinterest, and others, (c) print advertisements, (d) TV commercials, and (e) shopping outlets including the website and physical stores. Depending on the market, certain marketing channels are not utilized (for example the catalog in China) or alternative platforms are used (for example Youku in China).

(a) Direct marketing. The layout of the catalog and the email newsletter are created in the HQ, and are in line with H&M's global corporate identity. The pictures featured on the cover and back page are the same in the US and Germany (H&M Catalog, 2016a; H&M Catalog, 2016b). The catalogs are also translated into different languages depending on the costumer's native tongue (H&M Catalog, 2016a; H&M Catalog, 2016b). Email newsletters are released almost every day, and communicate discounts, special holiday offers, or the arrival of new collections. Newsletters are all sent from H & M Hennes & Mauritz GBC AB email address "no-reply@hm.com" and very often have the same topic and pictures across Germany, the US, and China. Nonetheless, they are translated into the respective language. In some countries, like China, Switzerland, and Canada, multiple newsletters are offered since the target market consists of different language segments.

To be able to compare the differences for the German, US and Chinese market, the email newsletter from October 17, 2015, and the fall catalogs of 2016 will illustrate whether H&M adapts its direct marketing.

(b) Social Media. It is part of H&M’s global marketing strategy to focus on global social media accounts in English instead of managing many country-specific accounts. Considering that H&M’s most important markets are Europe and the US, the most popular social media outlets used are Facebook, Google+, Instagram, Pinterest, YouTube, Snapchat, and Twitter. H&M tries to integrate its overall strategy in all channels where themes, images, and videos, are coherent and even refer to each other. The Facebook account is a global one and posts appear about once a day about H&M events, celebrities wearing their clothes, or new fashion releases (Facebook, 2016). The +HM account posts pictures with headlines on Google+ with a similar frequency (Google+, 2016).

Pinterest and Instagram are platforms focusing on images and photographs, and therefore, language differences are not in the way of communicating a message. Youtube, a video platform, is used to host videos and commercials, and Snapchat, an app for short video clips, is used to share H&M events in real-time. Twitter is the only social media platform that has accounts for each country. “Hmdeutschland” tweets two to three times a day, including pictures of new products, celebrities wearing H&M clothes, events that H&M supports or personalities and models who work with H&M (Twitter, 2016). The pictures on Twitter and Instagram are often identical, which is in line with H&M’s integrative marketing approach across channels (Twitter, 2016; Instagram, 2016).

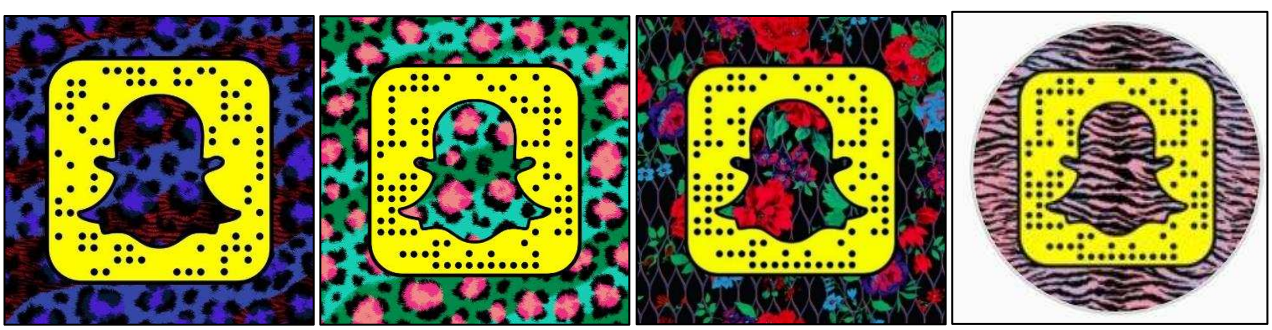

Figure 4.1: H&M social media icons on Facebook, Google+, Twitter, and Instagram using the Snapchat ghost icon and Kenzoxhm background patterns.

Source: H&M facebook page, October 14, 2016, URL: https://www.facebook.com/hmtheus/?fref=ts; H&M Google+ page, October 14, 2016, URL: https://plus.google.com/+HM; H&M USA Twitter page, October 14, 2016, URL: https://twitter.com/hmusa?lang=en; hm Instagram account, October 14, 2016, URL: https://www.instagram.com/hm/

In October 2016, social media account icons were used for promoting the recently established Snapchat account as well as the current designer collaboration with Kenzo. The icons on

Facebook, Twitter, Instagram, and Google+ were all created using the Snapchat icon with a KENZOxHM pattern in the background (figure 4.1) which is an example where H&M's promotional activities are clearly drawing attention to each other and are coordinated across channels.

(c) Print advertisements have been a very important promotional tool for H&M in Europe, for example in Germany. Print posters featuring models with their newest line of clothing and the price are the standard images. Print campaigns line up with overall promotional materials and strategies and are also created in the H&M HQ (H&M Hennes and Mauritz AB, 2016a, para. 2). Among others, H&M has contracted Naomi Campbell, Heidi Klum, and Johnny Depp for campaigns, which have also featured bikinis and underwear (Heer, 2005, para. 1).

(d) TV commercials. Unlike in its earlier days, H&M has increased its TV commercials since 2005 and now uses print advertisements to support them as an integrative tool (Lachmann, 2005, para. 5). Commercials use only little text in English and communicate most messages with images. Apart from airing them on TV channels, H&M's also shows them on its worldwide YouTube channel. Especially in the US, H&M has used commercials to raise brand awareness and gain popularity (Taylor, 2012, para. 1).

(e) Store interior, displays, and signs are also created in the H&M HQ. Besides physical store locations, H&M also offers online shopping through their website in many countries including Germany, the US, and China (H&M Hennes & Mauritz AB, 2016n). Websites are available in the country's language. For example, the website for Mainland China can be opened in English as well as in Mandarin (H&M Hennes & Mauritz AB, 2016n).

4.2.3.1 US-American market

H&M recognized its market potential in the US, and coming in as a global brand, has also made efforts to fully tap into the market using several adaptation strategies. This section shows examples in direct marketing (catalog cover and Columbus Day email newsletter), and a strategic campaign utilizing several channels (Super Bowl commercials with extensive social media involvement).

Figure 4.2: Cover of the US H&M catalog “New Season”. Arrived on October 12, 2016.

Source: Picture of “H&M Catalog. (2016a). New Season 2016. Distributed in the USA: H&M Hennes & Mauritz AB.” Own photograph, Jacksonville, USA, October 12, 2016.

Figure 4.2 shows the cover of the H&M catalog distributed in the US in the beginning of October 2016 which has few similarities compared with the cover of the German catalog that was sent out at the same time. The title “NEW SEASON – The top trends to boost your style” is rather broad and does not focus on a special weather season. Additional text advertises “THE NEW STYLES! - The must-have shoes, bags & details”, “MENSWEAR: versatile & wearable”, and “STYLE HEROES for kids”, covering the three target segments of women’s, men’s and children’s clothing. It also offers a “20% discount and free shipping on orders over $60”. The female cover model is sitting indoors by herself on a chair, wearing flat ballerina shoes, a long light pink dress and a olive green light jacket. The US version of the “FALL FASHION” catalog arrived in the end of October, about two weeks later than in Germany. This approach might be due to fact that the US covers various climates and fall weather can range from cold and rainy to warm and sunny.

Figure 4.3: Cover of the US H&M catalog “Fall Fashion”. Arrived on October 24, 2016.

Source: Picture of “H&M Catalog (2016b). Fall Fashion 2016. Distributed in the USA: H&M Hennes & Mauritz AB.” Own photograph, Jacksonville, USA, October 24, 2016.

The US catalog that arrived in late October 2016 is titled “FALL FASHION” as seen in figure 4.3 has the same cover picture and headlines than the German catalog. But the tone in which customers are addressed is more informal, e.g. “All the new season styles you’ll want”. The abbreviation of “you’ll want” from “you will want” makes the statement sound more casual.

Figure 4.4: H&M email newsletter from October 8, 2016 promoting Columbus Day Sale.

Source: H & M Hennes & Mauritz GBC AB (October 8, 2016). Columbus Day Deal. H&M Fashion News. Email Newsletter from no-reply@hm.com.

One the one hand, some promotional email newsletters are for special sales in the US, e.g. before minor US holidays like Columbus Day on Oct 10, 2016. The Columbus Day Deal as seen in figure 4.4 was only valid online and offered 60 percent off on selected items. Since Columbus Day is only observed in the US (but has recently been eliminated as a school holiday), H&M's sales promotion was specific to the US market.

On the other hand, email newsletters which are all prepared in the HQ, have the same or very similar content, and most often only the languages differ. Figure 4.5 shows the US version of the Halloween promotional newsletter from October 19, 2016. Compared to figure 4.7 (Germany), and figure 4.8 (China), the picture is the same, except for the highlighted item, Imitation Leather Shorts 17.99 USD, which is different. The "Printed Body" which is featured in the German and Chinese newsletters is not available in the US (figure 4.6 and figure 4.8). While the promoted items differ, the newsletter's design is still part of the global strategy.

Figure 4.5: Email newsletter for the US market, Oct 17, 2016.

Source: H & M Hennes & Mauritz GBC AB (Oct 17, 2016c). Gather your squad: it's Halloween!. H&M Fashion News. Email Newsletter to subscribers in the US from no-reply@hm.com.

H&M adapted their marketing to the US market and culture, and successfully implemented a cross-channel promotional campaign in 2012. It used one of the unique and most prominent advertisement channels in the US which is a TV commercial during the Super Bowl (the championship game of the National Football League). The Super Bowl is one of the most attractive and expensive advertising opportunities in sports to reach a large audience (over 100 million viewers). Commercials are recognized to be the most creative and memorable of the year (Kim, Cheong & Kim, 2012, p. 249).

First, Steve Lubomski, who has been the Marketing Director of H&M in North America from 2008 to 2015, identified the potential of this advertising channel particularly important in the US, and issued the first campaign in 2012 (Conniff, 2012, para. 1). The commercial starred soccer star David Beckham and introduced the David Beckham Bodywear line which includes briefs, boxers, tank tops and henleys (Elliott, 2014, para. 2). To prepare for the campaign, Lubomski had to explain the potential of the Super Bowl to the global Chief of Marketing Officer (CMO) and the Chief of Executive Officer (CEO) in the H&M's Swedish headquarters, and make sure that enough products would be available in stores throughout the entire duration of campaign (Taylor, 2012, para. (1)). After successfully convincing the headquarters of this strategy for the US, H&M utilized this special cultural event for their marketing campaign and hired a US sports PR agency to be able to adapt the commercial to the audience (Taylor, 2012, para. (4)).

Second, using celebrities to endorse and promote your brand is very popular and can be very effective in US advertisement (Kelting & Rice, 2013, p. 602). H&M's strategy to star David Beckham worked because he is a well-known celebrity in the US, since he was already advertising for Emporio Armani, Gillette, Sharpie, Adidas, Burger King, Samsung, and Pepsi (Kelting & Rice, 2013, p. 603). Kelting & Rice (2013) showed that a high match between the celebrity and the product will lead to more memorability among consumers. Choosing David Beckham and focusing the commercial on him wearing the Bodywear line ultimately increased H&M's brand awareness (Taylor, 2012, para. (5)). Additionally, H&M also cooperated with Twitter accounts of celebrities during the social media interaction, like Cruz, Touchdown, and Madonna to talk about the commercial, so that the topic would draw more attention among followers (Taylor, 2012, para. (3)).

Third, H&M has recognized that the US consumers engage in social media with companies, and share and discuss advertisements and commercials on social media platforms. Social media includes a variety of forms of internet-based communication which allows to share written statements, visual content, and other information (Blanco, Doering, Hunt-Hurst, & Lee, 2016, p. 272). Through these channels, firms can create a personal dialogue with consumers, and immediately address customer complaints and comments (Blanco et al., 2016, p. 272). The Twitter account @HMUSA currently has about 575.000 followers (Oct 23, 2016), and the marketing team posts pictures and short messages several times daily, including sales promotions, new products, and prominent people wearing H&M items (Twitter, 2016b). Also during the championship game, the H&M marketing team was actively involved on their social media accounts publishing 21 times on Twitter, and engaging with comments from the audience who had mentioned the TV commercial (Taylor, 2012, para. (3)). Employees also monitored the H&M Facebook account and other social media outlets closely and in real-time which made them the most active brand during Super Bowl in 2012 (Taylor, 2012, para. (3)).

In conclusion, H&M’s strategy in the US mainly follows the global marketing campaigns, but also recognizes and adapts to US particularities, like the large amounts of climate zones, holidays, sporting events, the popularity of celebrities, and the use of social media. During the US Super Bowl, it focused on combining all advertising channels and social media outlets to convey one message and product line. Utilizing the US-specific event and tapping into the knowledge of a US PR firm for sport audiences, the campaign was a success and increased their national brand awareness by 6 percent (Taylor, 2012; Conniff, 2012). Due to the success, another commercial with David Beckham was aired in 2014 (Elliott, 2014, para. 1).

4.2.3.2 German market

Germany is H&M’s largest and most important market in the world and creates the largest revenue for the company. Therefore, the access to stores as well as the use of different marketing channels in Germany are exemplary among H&M’s markets. Germany has been the country of pioneering for marketing campaigns, and new promotional channels or campaign strategies are often first introduced and utilized in Germany (Cope, 2016). The German website reveals that H&M indeed does have a global marketing strategy, and therefore, only adjusts to specific culture where necessary. The German market is no exception in that some promotional activities are not adapted, e.g. global social media platforms remain in English.

Thus, there some examples where H&M used promotional activities that worked particularly well for the German market considering its culture or other aspects. H&M currently chooses to adapt and not just translate its catalog for Germany. Email newsletters are often just minimally adjusted.

Figure 4.6: Cover of the German H&M catalog “Herbstmode”. Arrived October 18, 2016.

Source: Picture of “H&M Catalog. (2016c). Herbstmode 2016. Distributed in Germany: H&M Hennes & Mauritz AB.” Own photograph, Bayreuth, Germany, October 18, 2016.

The H&M catalog distributed in Germany in fall 2016 is titled “HERBST MODE – Alle neue Styles der Saison, die Sie sich wünschen (Translation: FALL FASHION – All the new season styles you’ll want)”. The German catalog addresses its customers with the formal form of “Sie (You)” instead of the informal “du (you)”. Other headlines in figure 4.6 also particularly address the change of season and need for warmer clothing, i.e. jackets with “1 JACKE, 4 LOOKS (Translation: 1 JACKET; 4 LOOKS)” and “FRISCHE LOOKS – Von Rüschen zu trendigen Strick (Translation: FRESH LOOKS – Frills to trendy knits)”. Interestingly, the English word “looks” is used on the German cover whereas on the US, it says “4 WAYS” instead of “4 LOOKS”. The female cover models in figure 4.6 are standing in front of what seems to be blue sky and their hair is blowing in the wind. The women wear a knitted sweater, a woolen high-neck long sleeve sweater, and a long, long-sleeve patterned dress and cap. This shows that H&M focuses on warmer clothing for the fall season.

The email newsletter from October 17, 2016 (figure 4.7), with the same picture as in figure 4.5 was also sent to the German customers. But the language was changed to German, and the highlighted item was “Body mit Druck” (Translation: printed body) with the price of 12.99 EUR (about 14.11 USD). Therefore, adaptation to the German market was minimal, and the global template was used.

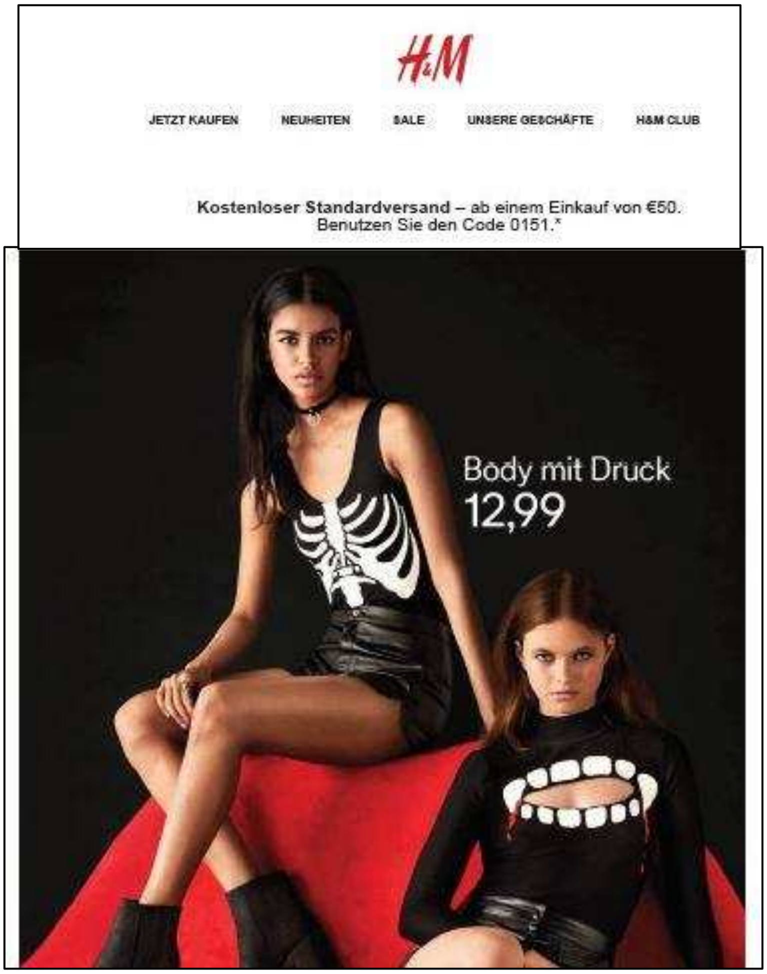

Figure 4.7: Email newsletter for the German market, Oct 17, 2016.

Source: H & M Hennes & Mauritz GBC AB (Oct 17, 2016d). Perfekte Details für Halloween!. H&M Fasion News. Email Newsletter to subscribers in Germany from no-reply@hm.com.

Interestingly, there was no language adjustment done for most social media outlets in Germany. The German H&M website forwards social media users to their English, worldwide H&M accounts. The only account customized to German users is Twitter, where @hmdeutschland posts several times a day (Twitter, 2016a).

Print advertisements have been a very important promotional tool for H&M in Germany. Especially before the year 2005, the company was prevalent and prominent for its print posters featuring models with their newest line of clothing. H&M in Germany also did not shy away from suggestive images. For example, in 1993 the print advertisements presented Anne-Nicole Smith, a playboy model, in H&M's lingerie collection. The erotic images distracted drivers, and after this reportedly had caused several accidents, officials took measures (Heer, 2005, para. 1). German society is rather open to immodest and erotic themes (Sarnow, 2013, p. 11), and even though the campaign was received with shock by some, it worked well for the German market (Heer, 2005, para. 1).

Unlike in its earlier days, H&M has increased its TV commercials since 2005 and now uses the print advertisements in a supporting role (Lachmann, 2005, para. 5). Commercials are usually produced using mostly images, some phrases in English, and a matching song that fits with the theme. Using few words and transmitting the message mainly via images, the commercials can be used worldwide, and are also accessible via H&M's global YouTube channel.

A recent example of a worldwide H&M campaign that was also used in Germany and exemplifies the integrated promotional concept of the TV commercials and print advertisements was the 2015 Christmas campaign "Happy and Merry" with Katy Perry. The TV spot and the video posted on YouTube featured a Christmas dancing show, which included several Christmas characters, the US popstar Katy Perry with changing H&M outfits, and was accompanied by her Christmas song "Every Day is a Holiday" (Rentz, 2015, p. 10). Print images of Katy Perry modeling the collection were also positioned on shopping streets throughout the German market (Piatscheck, 2015, para. 4).

Even though H&M's worldwide marketing strategy is widely used in Germany, there are a few examples of adapting the campaign to the German market. In 2010, H&M had Lena Gercke, the winner of Germany's Next Top Model, under contract for the catalog of the spring collection. She was already on the German front cover of fall the catalog 2009 (Rösch, 2010, para. 1).

Germany was the first market to be targeted for a designer collaboration. In 2004, Karl Lagerfeld, a German fashion designer became the first high-profile designer to work on a collection with H&M, creating a range of clothing items for men and women (Cope, 2016, para. 1). The collection was sold out within minutes after opening the stores on November 12, 2014. This concept has proven to be very successful and the collaboration with the German designer set precedent for future collaboration with global designers and artists such as Madonna, Kylie Minogue and Beyoncé (Nowicki, 2014, para. 1). A promotional strategy that worked in Germany was therefore applied worldwide.

But H&M also pushed marketing concepts that worked well in another country into the German market. For example, the children's collection for the US holiday Halloween featured clothing, costumes, and toys was released worldwide for the first time in 2012. The holiday which is increasing in popularity, had not traditionally been part of German cultural events. Therefore, In this case, H&M uses a US event globally and does not adapt it to the German market. (Nowicki, 2012, para. 1)

4.2.3.3 Chinese market

When entering the Chinese market in 2007, H&M's basic promotional strategy was focused on the buzzing openings of their flagship stores. Due to the popular location near luxury retailers, H&M was able to increase brand awareness (China Economic Review, 2012, para. 5). Since launching advertisement campaigns in China is cost-intensive, H&M has relied on creating events and excitement around their flagship stores and the grand opening parties of them (China Economic Review, 2012, para. 5). Now that more locations have opened, H&M also reaches potential customer through social media, commercials, and advertisements.

However, not all channels are equally utilized compared to Germany and the US. For example, H&M does not offer a paper catalog in China. Therefore, the website and the email newsletter are H&M's only remote promotional tools. Figure 4.8 shows that H&M offers newsletters in two different languages: Mandarin and English. Adapting to the Chinese market also means considering how to reach both internationals and expats living in China as well as the local population. The featured item is the same as in Germany, the printed body offered at a price of 99.90 RMB (14.80 USD) which is about 0.70 USD more expensive than in Germany.

Figure 4.8: Email newsletters for the Chinese market (Mandarin and English), Oct 17, 2016.

Source: H & M Hennes & Mauritz GBC AB (October 17, 2016a). 万圣节来了，快召集你的小伙伴们吧!. (Gather your squad: it's Halloween!) H&M Fashion News. Email Newsletter to subscribers in China (Mandarin and English) from no-reply@hm.com.

Some social media channels, like Facebook, Youtube, and Twitter are not available in China due to government restrictions (Chiu, Ip & Silverman, 2012, p. 1). H&M chose to work with popular alternatives, namely Weibo (social network), Youku (video platform comparable to YouTube), and Wechat (social network and texting app) where they post content in Chinese (H&M Hennes and Mauritz AB China, 2016, bottom of page).

As mentioned before, Chinese consumers are very brand friendly (Doctoroff, 2012). Brands are an important tool and symbol for their success in society. Therefore, the image of the H&M brand is particularly important for their advertisement campaigns, the country-of-origin effect can also play a positive role for the brand.

International retailers like H&M are confronted with the questions whether to change the promotional materials in each market and choose domestic models or not. Whereas in most countries in-group models (i.e. native Chinese models in China) are known to be more effective, Asian consumers have responded more positively to Western models (Chang, 2014, p. 155; 173).

Chang's study (2014, p. 155) with Taiwanese consumers has shown that ads with Western models were perceived more positively and credible, and promoted stronger self–brand connections. Especially brands which target consumers looking for individual styles, the use of Western rather than East Asian models is beneficial (Chang, 2014, p. 173). Therefore, it can be concluded that H&M's standardized campaign, which usually features a variety of ethnicities, can be used in the Chinese market and there is no need to change the campaign images. Choosing the Western-looking images might even be beneficial for the brand image, as Chinese consumers associate them with a high degree of individual style.

Nonetheless, H&M does use Chinese holidays for additional campaigns. During Chinese New Year 2014, the most important Chinese holiday, H&M created a campaign and collection especially for target markets in Asia, namely China, Hong Kong, Singapore, and Malaysia (Fashion Gone Rogue, 2013). To localize the appeal of the brand, H&M collaborated with Chinese style icons to endorse the brand, namely the two models Sui He and Tian Hi. They continued the successful campaign and chose Liu Wen (a Chinese model) and Siwon Choi (a Korean singer and actor) as the models in 2016.

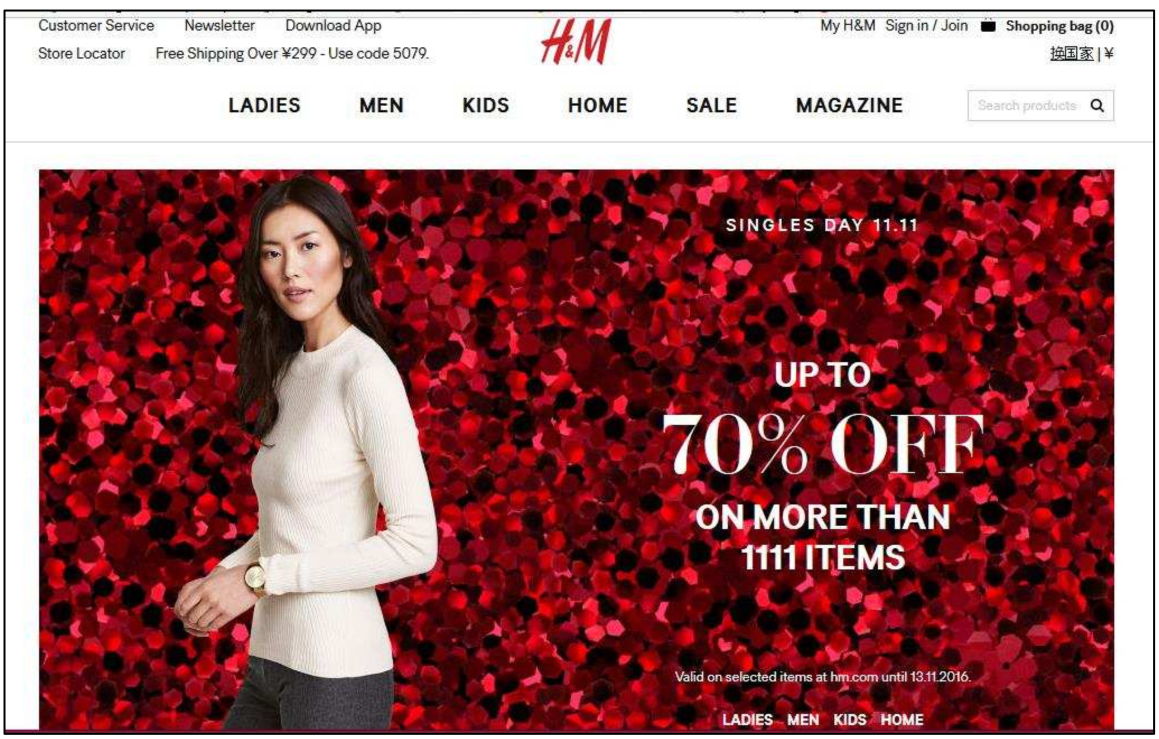

Figure 4.9: Promotion for Singles Day 11.11 on the homepage of the H&M Website for China (English version).

Source: H&M Hennes and Mauritz AB (November 04, 2016). Website for Chinese market (in English). URL: http://www2.hm.com/en_cn/index.html

A big online shopping event in China is “Singles Day” which each year falls on the date November 11 (11.11) that has four times the digit “1”. H&M utilizes this promotional festival for an extended sale of about 10 days. Singles Day was first introduced by the online platform Alibaba, where many merchants offered 50 percent discounts (Jing & Ruiming, 2013, p. 30). The participating stores and the sales volume has grown significantly since then (Jing & Ruiming, 2013, p. 31), and in 2016, Alibaba registered sales for 17.7 billion USD, only in the first 24 hours (Lucas, 2016, para. 1). Since the younger generation in China grew up with the internet, the awareness of online shopping habits is essential, and figure 4.9 shows that H&M created promotions utilizing these trends. For this Chinese event H&M also decided to use a Chinese model for the picture on their website (see figure 4.9).

The style icon collaboration with celebrities or designers were run in China as they were part of their global campaign. They did target the Chinese customers though, for example by giving them prior access to large collections by Madonna and Kylie Minogue during the launches of flagship stores in Hong Kong and Shanghai. On Chinese social media, clips with David Beckham were the same as in the global networks.

4.2.4 Product adaptation

Part of H&M’s global strategy is standardization of most of the clothing portfolio they offer. This also includes size of the apparel items. The table 4.1 below demonstrates that even though size names numbers differ in Europe (Germany), China, and the US, the actual categories (e.g. XS, S, M, L, XL) stand for the same bust, waist, and seat measurements. Therefore, the size and fit of clothes are identical in all countries.

Table 4.1: H&M size guide for ladies combining US, European, and Chinese sizes

	XS		S		M		L	
US size	2	4	6	8	10	12	14	16
EUR size	32	34	36	38	40	42	44	46
CN size Tops	155/76A	160/80A	165/84A	165/88A	170/92A	170/96A	175/100 A	175/104 A
CN Size Bottoms	155/60A	160/64A	165/68A	165/72A	170/76A	170/80A	175/84A	175/88A
Bust (cm)	76	80	84	88	92	96	100	104
Waist (cm)	60	64	68	72	76	80	84	88
Seat (cm)	84	88	92	96	100	104	108	112

Source: H&M Hennes and Mauritz (2016o). Customer Service – Size Guide. URL: http://www2.hm.com/content/hmonline/en_cn/customer-service/sizeguide/ladies.html; http://www.hm.com/us/sizeguide/sizeguide_ladies.

Product adaptation also includes the creation of additional lines of clothing or change of assortment within a global collection. A prime example for this is H&M's "Halloween Spirit" Collection for children. Even though the title of the collection is English in Germany, the US, and China, the items within the collection differ, as we can see in the Halloween Spirit collection. H&M chooses carefully which clothes it offers in which market and adapts the assortments of the online shop to meet customer expectations and demands. Physical stores also

4.2.4.1 US-American market

In the US, the Halloween Spirit collection for kids carried 11 items which include also shoes, socks, a few costumes, pants, and sweaters with Halloween prints (figure 4.10). The main promotion picture shows a boy in a Dracula outfit and a girl in black dress with skeleton print, and the selection also has items that are on sale (figure 4.10). Searching the term "Halloween" in the KIDS section revealed a large selection of 87 items costumes for children which are categorized under different a different section. (H&M Hennes and Mauritz AB, 2016p)

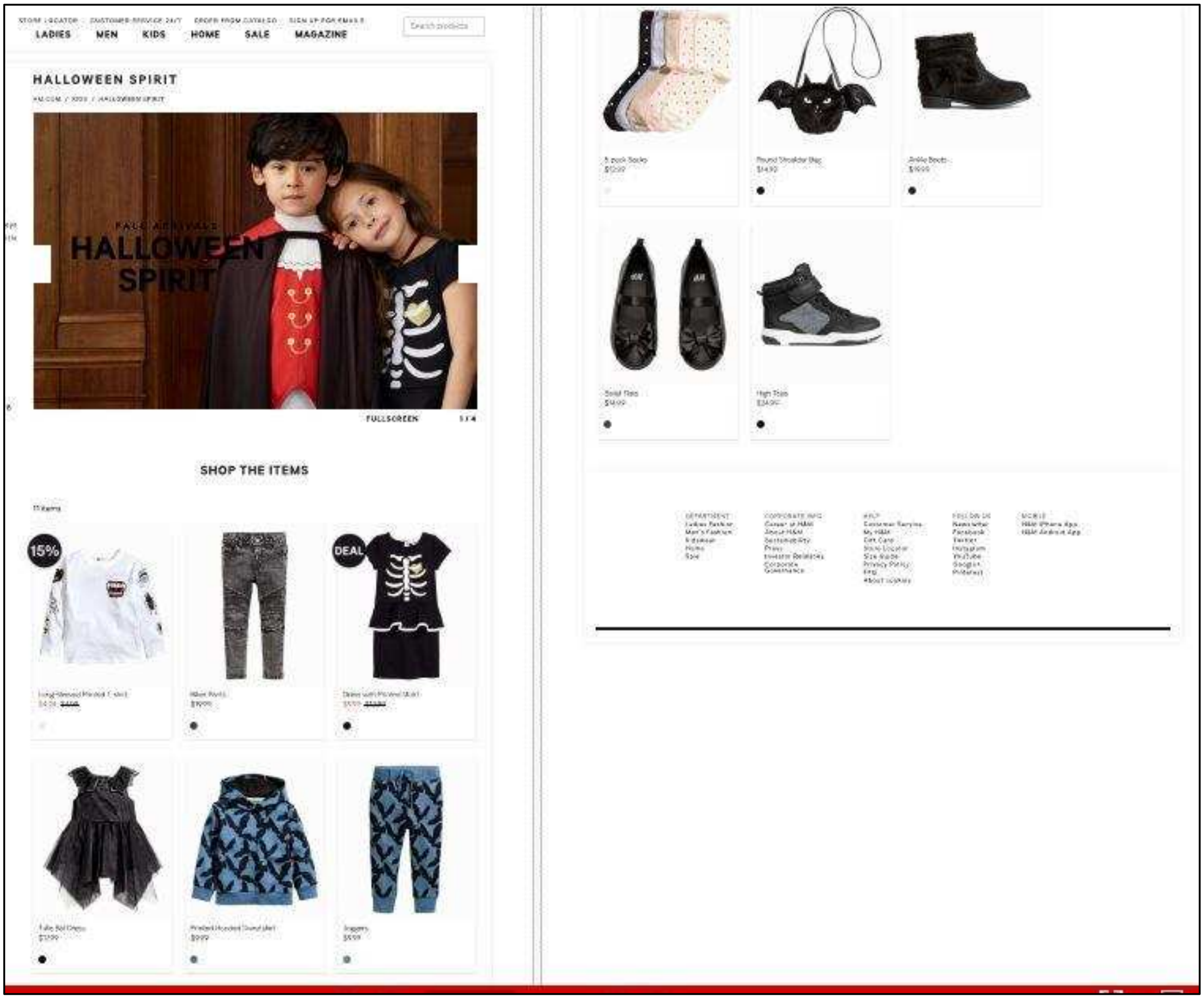

Figure 4.10: Kids Halloween Spirit Collection October 2016 in the US.

Source: H&M Hennes and Mauritz AB (2016p, October 23). Kids – Halloween Spirit. URL: http://www.hm.com/us/department/KIDS

4.2.4.2 German market

The Halloween Spirit line in Germany included 14 items, and includes an additional pair of shoes and a neck band for girls (figure 4.11). The main picture is the same as on the US website. There is a total of 84 “Halloween” related items for children that can be found on the German website. However, this selection does not include as many costumes as the US website. (H&M Hennes and Mauritz AB, 2016q)

H&M offers Halloween clothing for children in Germany only since 2013 (Nowicki, 2012, para. 2). This might be due to the fact that dressing up for Halloween is not yet as popular in Germany as it is in the US.

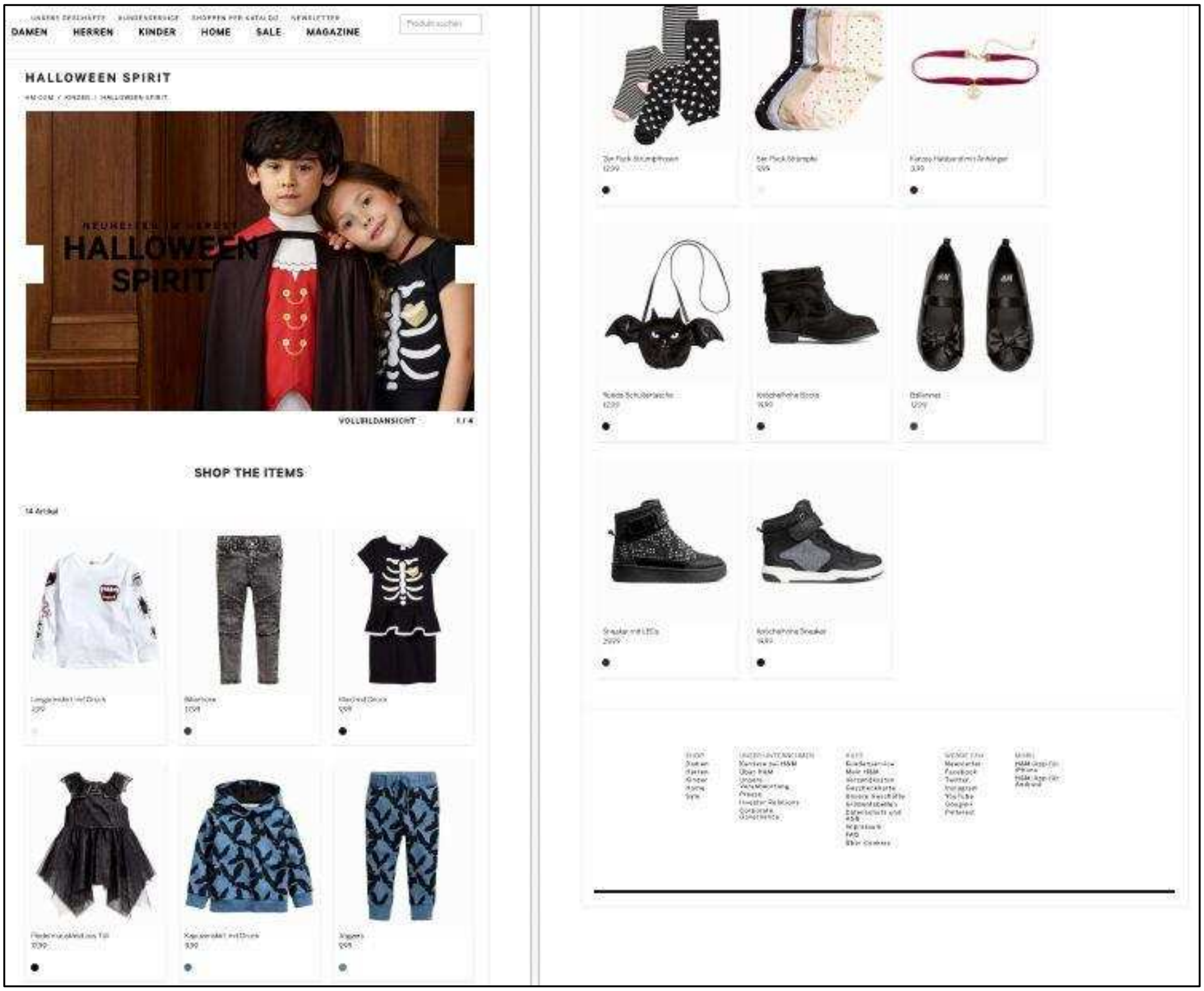

Figure 4.11: Kids Halloween Spirit Collection October 2016 in Germany

Source: H&M Hennes and Mauritz AB (2016q, October 23). Kids – Halloween Spirit. URL: http://www.hm.com/de/department/KIDS

4.2.4.3 Chinese market

The “Halloween Spirit” collection shown in the Chinese H&M online store contains more items than the US or German store. shows more items than the other two websites, namely 33 (figure 4.12). The main picture is different from the other two websites, and even though it shows the same boy and girl, the boy wears a blue-black graphic sweater and not a Dracula costume. When searching the entire KIDS section on the Chinese website for “Halloween”, 77 clothing articles are available which is less than in the other two countries (H&M Hennes and Mauritz AB, 2016r). But just like on the German website, there are only few costumes but more sweaters, leggings, and socks that are Halloween themed or also Disney princess-themed (H&M Hennes and Mauritz AB, 2016r). Halloween is only entering China through Western influence and has not yet reached a substantial level of popularity. This could be a reason why items are Halloween themed but the website does not actually offer costumes.

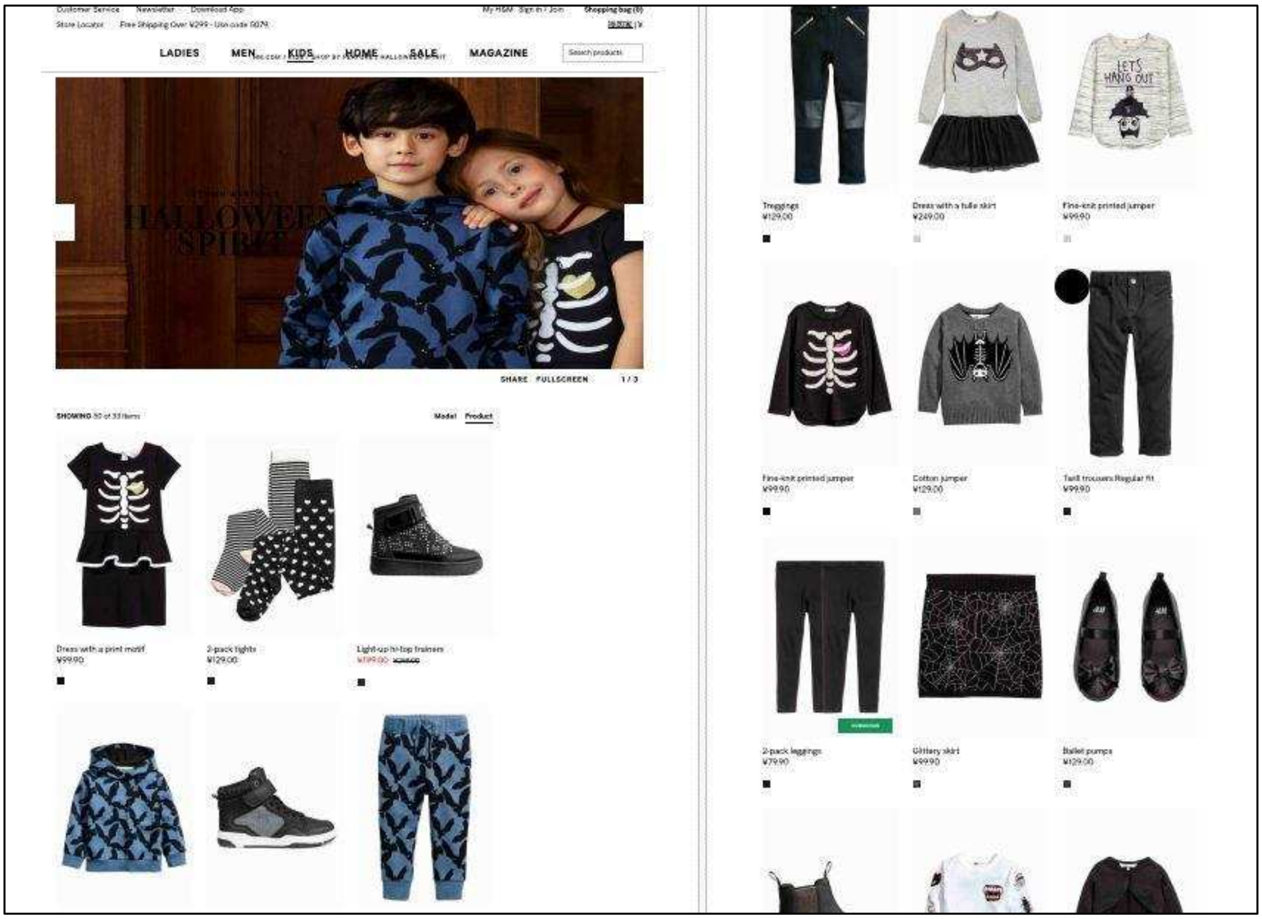

Figure 4.12: Kids Halloween Spirit Collection October 2016 in China

Source: H&M Hennes and Mauritz AB (2016r, October 23). Kids – Halloween Spirit. URL: http://www.hm.com/cn-en/department/KIDS

For Chinese consumers, H&M clearly represents a Western brand that follows Western trends. Nonetheless, country differences concerning apparel like color, size, and their attitude towards modesty, might make it necessary to adapt products to the Chinese market.

As mentioned in Chapter 3, companies need to conduct market research thoroughly to determine whether to offer their standard assortment, selected items or adapted products. Another consideration are the many different regions in China, in which consumer tastes and purchasing power can differ. The size of consumers also differs since Southern Chinese are comparatively smaller and slimmer than Northern Chinese people. (Ern-Stockum & Kromer, 2012, p. 5)

The figure below shows which strategy H&M could have chosen for their product range, including (1) global range, (2) portion of global range, (3) partly country-specific, and (4) further differentiation of range within China.

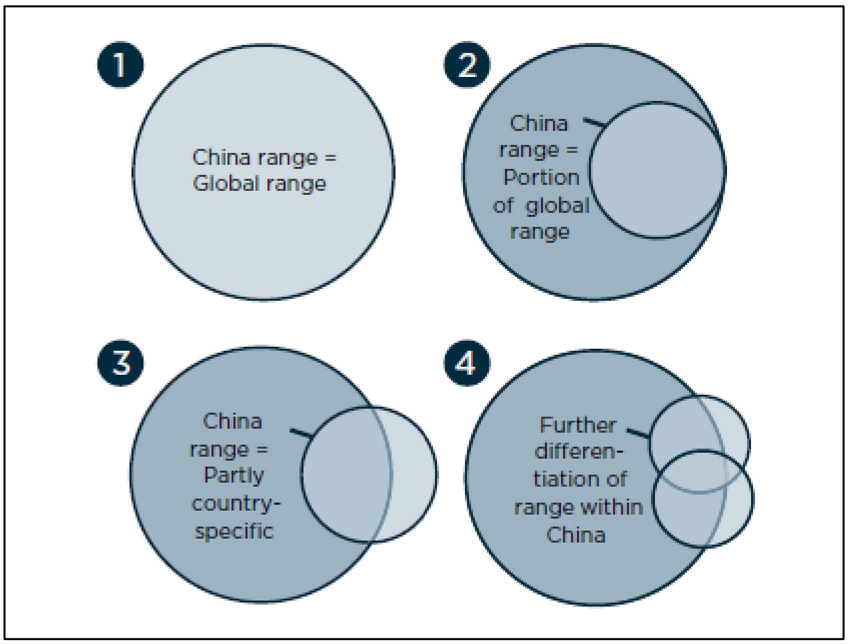

Figure 4.13: Range of Standardization vs. Differentiation in Chinese market

Source: Ern-Stockum, D. & Kromer, S. (2012). Entering China: Still a big opportunity when doing it right!. Kurt Salmon Retail Insights. Retrieved from http://www.kurtsalmon.com/uploads/2012%2BNov_WP%2BEntering%2BChina.pdf

According to an interview with H&M CEO Karl-Johan Persson, H&M carries about 80 percent of the same items world-wide but does some adaptations (China Daily, 2012, p. 1). For example, whereas H&M usually sells green men's hats, they do not put them on the shelves in China. The common phrase "wearing a green hat" refers to a cuckold, and therefore the product has a negative connotation (Madden, 2012, para. 6). Another negative symbol are white flowers as they are only used at funerals and are associated with death. Any summer dresses featuring daisies or other white flowers are therefore not part of the adapted assortment for China (Madden, 2012, para. 6). Another adaptation of store assortment is determined by the climate in H&M's stores location. For example, stores in tropical climate in Southeast Asia, like Malaysia, carry fewer clothes that are thick or down coats. This is also true for stores in South China (China Daily, 2012, p. 1). Other adaptations happen continuously during store operation, so that the items match customer demand (China Daily, 2012, p.1). According to China's marketing manager, Vivian Chen, H&M also conducts research with focus groups to determine what colors are suitable (Madden, 2012, para. 5).

The collections for Chinese New Year also adapt to Chinese customs. H&M created a collection that particularly used "lucky colors" for Chinese New Year which are red and gold to adapt to the consumers' cultural symbolic colors (Chiu, Myers & Goad, 2014, p. 3). The campaign has been successful for several years. The latest collection in 2016 also included the monkey as the annual animal on t-shirt and pullovers. Again, the dominating colors of the collection were red, accompanied by black, white and gold (H&M Magazine, 2016).

Even with the adaptations made for Chinese customers, loose, and oversized garments, which are part of the assortment H&M carries, often gives Chinese shoppers the illusion that H&M's style is a typical "European style". Although, as CEO Persson said, the "European element" is not an intended selling point of H&M, it can work in H&M's favor to be perceived as such (China Daily, 2012, p. 1).

In conclusion, it can be said that H&M's marketing strategy concerning product adaptation falls into the third category of the standardization vs. differentiation categories in figure 4.12. This means that H&M's range of products offered in China is a portion of the global range, but some are country-specific according to special events, cultural symbols, and styles (Ern-Stockum & Kromer, 2012, p. 5). There are also a few items that are made with the Asian market in mind and that are sold in China as well as other Asian countries.

The research also showed that both H&M and Zara used their understanding of cross-cultural consumer behavior to target similar consumer segments around the world. For example, the identification of a cross-national fashion subculture present in many global metropolises enabled these apparel companies to sell a line of standardized products to customers in these cities.

7.2 Conclusion

This paper has analyzed the internationalization process of the two global apparel companies H&M AB and Inditex, focusing on their flagship brands H&M and Zara. The research has illustrated how these two companies create a competitive advantage in culturally different markets, focusing especially on the German, the Chinese, and the US-American markets. Four key business areas for the internationalization process have been selected as a basis for the analysis, namely market entry, brand positioning, promotion, and product adaptation. The analysis of the strategies adopted in these four business areas and in these three countries served as the outline to a comparison of the similarities and differences between the strategic decisions of the two firms. Specific examples showed how and to what extend the apparel companies adapted to the cultural differences that they were faced with.

This paper has contributed to the field of internationalization in business and marketing strategy, and has presented several best practices on how firms can create and sustain a competitive advantage in culturally different markets. These best practices can be useful for other companies who operate in culturally different markets or who wish to internationalize. The sections on specific markets serve business executive, researchers, and international marketers to explore and apply aspects of the local culture. Nonetheless, since cultures are dynamic, continuous research is needed in the field of international marketing and business, as current recommendations are only accurate as long as the business environment, consumer behavior, and cultural perceptions have not significantly changed. The fact, that successful global brands do not need to adapt most of the apparel, and have even identified cross-national, young target groups with similar demands, shows that there is cultural convergence among parts of the younger generation. How pronounced this development is, and how global social platforms might fuel these tendencies, is another interesting area of research that should be further explored.

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Fashion and New Luxury Digital Disruption: The New Challenges of Fashion between Omnichannel and Traditional Retailing

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Abstract

The digital transformation has changed the rules of the game even in the world of fashion, luxury and fast-fashion retail. The fashion system today faces the challenge of renewing business models to intercept changes in purchasing and consumption behavior. Competition is played in the ability to create multi and omnichannel business models. The present work, after a careful analysis of the literature and the changes that have taken place in the fashion world, aims to study some innovative business models in the fashion system and in particular to investigate the perspectives of the physical store threatened by the digital transformation. The research offers points for reflection on the future of omnichannel fashion retailing. Will technology be able to create value for new consumers in the future? Moreover, from the retailers' perspective, case analysis will clarify which technologies are characterizing fashion sales points with the best performances in Retail 4.0. Finally, a section will be dedicated to the presentation of a theoretical framework on the adoption of omnichannel fashion retailing figured out through a review of the literature and managerial implications.

Keywords: digital disruption, fashion, luxury, mobile, omnichannel, online-offline retailing

1. Introduction

The distribution channels are in a phase of radical change. The success of the online channel and digitalization, driven by a few leading companies in recent years, have drastically changed the way people live and are changing purchasing patterns. The new technologies have multiplied the touch points, the broadband connectivity has increased the "always on" consumers, and at the same time, the online purchases (Pentina & Hasty, 2009). In particular, mobile commerce has recently accelerated.

What are the implications of digital technological innovations? Will the physical store continue to play a key role? Will the online purchases be able to offer an engaging and exciting experience to the consumer?

The integration of e-commerce with physical channels creates opportunities and synergies: companies can offer multiple services through different channels and for different target segments. Internet retailing is creating greater value for the customer in terms of additional services and additional touch points.

To address these technological improvements, many retailers have developed multi-channel strategies by adding new touch-point channels to their portfolios through which companies can interact with consumers (Verhoef, Neslin & Vroomen, 2007). To manage the new competitive logic and establish a long-lasting relationship with consumers, retailers have begun to manage the customer experience and integrate the retail mix levers of all distribution channels (Neslin et al., 2006). The major grocery retailers have become multichannel and the most dynamic ones are oriented to offline online integration and to omnichannel (Rigby, 2011), with the aim of providing consumers with more engaging, comfortable and uninterrupted experiences. Research on the new omnichannel retailing paradigm is still limited, in particular, research on omnichannel fashion retailing.

2. Omnichannel Retailing and Retail 4.0

The literature hypothesized a clear distinction between physical channel and online channel, but the recent integration of the channels led first to the study of multichannel (Lazaris & Vrechopoulos, 2014) and then to omnichannel (Verhoef, Kannan & Inman, 2015). However, the new paradigm has still different meanings: it can refer to a survival strategy (McCormick et al., 2014), to a unique "seamless" operation (McCormick et al., 2014) or it can indicate a service designed for consumers available anywhere and at any time (Fairchild, 2014). Today, consumers consider sales and marketing channels as a single entity, and the shopping experience is experienced without interruption regardless of the type of channel used (Herhausen, Binder, Schoegel & Herrmann, 2015). In fact, omnichannel consumers use many or all of the available sales channels simultaneously during the purchase process: online channels, mobile devices and physical stores (Rosenblum & Kilcourse, 2013; Lazaris & Vrechopoulos, 2014). Omnichannel retailing conceptualizes the integration of all digital and physical channels (Rigby, 2011; Klosek, 2012; Frazer & Stiehler, 2014). Omnichannel management provides, therefore, a synergic management of the touch-points in order to optimize the consumer experience (Herhausen et al., 2015). Often the terms multichannel and omnichannel are considered synonymous. However, the literature considers omnichannel retailing as a new paradigm. It is considered the set of activities involved in the sale of goods or services through all the channels activated at the same time with complete interaction by consumers and a full integration controlled by the retailer (Beck & Rygl, 2015).

Since 2010, cross channel and above all omnichannel strategies have spread and, at the same time, literature has begun to investigate the challenges of their implementation (Bell, Gallino and Moreno, 2013; Brynjolfsson, Hu & Rahman, 2013; Lewis, Foster & Whysall, 2013; Strang, 2013; Beck & Rygl, 2015). Researchers sought to clarify the challenges retailers face (Herhausen et al., 2015) and to analyze the implications for supply chain partners too (Brynjolfsson et al., 2013). The resources are moving towards the goal of creating a unique and personalized shopping experience. The new omnichannel strategies are directed towards a more intelligent, integrated and creative use of technologies. Desai, Potia and Salsberg (2012) have defined the new frontier as Retail 4.0. In an omnichannel context, the physical and digital virtual worlds are integrated and oriented towards hybrid solutions: the consumer can buy online and withdraw in store, can choose a product in the store and if this is not available he can order it online, he can buy online and return the product to the store. Retail 4.0 physical stores are increasingly connected and offer customers various formulas to search online for information: tablets, interactive totems, mirrors and interactive walls, virtual dressing rooms, mobile apps and live chat. In addition, retailers can use RFID, Qr-code and beacon labels that allow them to send personalized messages to consumers and manage the relationship in order to better understand consumer behavior. The creation of a unique shopping experience is one of the priorities of fashion and luxury brand retailers who are therefore forced to adopt an omnichannel approach and to manage the physical and digital dimensions of retail phygital (Armstrong & Rutter, 2017).

3. The Rise of Omnichannel Fashion Retailing: Insights

Consumers increasingly informed and omnichannel, in the fashion sector increasingly attach importance to the experiential and emotional dimension of the shopping experience. The fashion retailers, after seasons focused on the opening of physical stores, have begun to develop new virtual spaces. Fashion, with 28% growth in 2017 (2.5 billion euros) is one of the leading sectors of Italian e-commerce, preceded only by tourism, information technology and consumer electronics (Osservatorio eCommerce, 2017). The challenge for fashion retailers is to manage all the touch points and guarantee a unique brand experience that is consistent with the brand's values. Indeed, digital transformation is not just e-commerce but also a dynamic website, presence in social networks and app development. The integration of digital technologies in store is another priority for fashion retailers; the physical store, to continue to play a crucial role in the mind of the customers and avoid cannibalization, must evolve from a simple place of sale to an environment in which to live a rewarding shopping experience.

Fashion brands today understood the importance of online, but are struggling to communicate their values via the web with respect to what happened in the boutiques of the physical channel. This is one of the causes of the digital delay of the fashion system (Keller, 2008; Kapferer, 2017). The intrinsic characteristics of luxury goods such as prestige, excellence in quality, exclusivity, symbolic meaning, emotional involvement and high price seem to clash with the founding principles of online channels and the Internet, namely democracy and accessibility (Dubois & Duquesne, 1993; Kapferer, 2017).

Literature has debated the attempt by fashion and luxury retailers to get out of what has been defined by Kapferer (2017) as "Internet Dilemma": on the one hand, the Internet is struggling to transmit sophistication, quality and emotional involvement, risking to trivialize the perceived value of fashion products; on the other hand, the online channel is also a powerful communication vehicle, allowing information to circulate more freely and quickly, reaching a large number of current and potential customers. Integrating offline and online allows retailers to enhance brand awareness and brand reputation (Aiello & Donvito, 2006).

Despite the advent of omnichannel fashion retailing, recent studies show that fashion stores continue to be a fundamental touch point for consumers. From a recent research by Forrester Research (2017) it emerges that in the fashion system both physical and digital stores play a fundamental role. The increase in online sales favors in-store purchases, confirming literature studies on the emergence of two opposite phenomena in an omnichannel context, showrooming and webrooming (Verhoef et al., 2007). Usually those who opt to buy online, even in the case of luxury goods, do so for convenience, convenience, for the presence of a wider assortment or for the possibility of customizing the purchase. On the contrary, those who prefer to buy in the traditional store do so because they want to touch the product before buying, as well as because they are afraid of counterfeit products or because they are buying luxury goods for the first time. Data on online sales, however, show that it is essential for fashion and luxury retailers to adopt an omnichannel approach.

Burberry is considered the pioneer of omnichannel fashion retailing and the complete integration of digital marketing in the fashion world. Angela Ahrendts, Chief Executive of Burberry from 2006 to 2014 was the promoter of the digital revolution of Burberry transforming the historic brand, always focused on elegance and English tradition, in a real Digital Luxury Retailer, enhancing its identity and the image. The success of Burberry in the online was confirmed by the Fashion Digital Index ranking drawn up by L2Inc which in 2015 named it the "Genius" of digital (L2inc.com, 2015). Burberry's omni-channel approach was driven by a desire to increase brand awareness, customer loyalty and consumer engagement. For these reasons Burberry decided to develop a social channel and an e-commerce site characterized by a very high quality of images and digital contents, the possibility to customize garments, to buy online and collect in store, to enjoy a service assistance via live chat and customer service. Unlike other fashion and luxury retailers, Burberry in offline boutiques wanted to offer its customers an experience similar to that experienced in the online channel. The Burberry flagship stores, and in particular the one on Regent Street in London, are technologically advanced and equipped with huge digital screens that project exclusive videos linked to the brand, live-streaming of events and catwalk shows. Burberry has also created the "Burberry Retail Theater" with live shows that are streamed in stores around the world (Burberry.com).

The fashion sector has seen in recent years the proliferation of e-commerce sites managed by pure player specialists who sell exclusively online to which many fashion and luxury brands entrust the management of the sales of their collection. Armani, Dolce & Gabbana and Moncler rely on Yoox to manage the single-brand online channel, others at Net-a-porter and Mytheresa.com, as did Prada and others at Asos, Privalia, Zalando, Luisaviaroma.com and Amazon. Other retailers decide to develop single-brand e-commerce sites, especially fast fashion and mass market retailers such as OVS, Oysho, H&M, Zara and Bershka. Interesting however is the proliferation of luxury brand e-commerce sites such as Gucci (the first to open the site in 2002), Armani, Chanel, Versace, Dolce Gabbana and Prada who understood the potential opportunities of the online and started to consider the online channel as a real alternative means of entertainment, so as to make them become places of leisure and enjoyable leisure time, also used to watch the catwalks of the few events put online, overcoming the actual exclusivity of the fashion shows.

The introduction of Fashion Social Networks and Fashion App by the major fashion retailers that are managing social media through digital marketing strategies is also interesting. The development of Fashion App is an alternative way to encourage the development of an interactive relationship with the brand, facilitate the search for information, accompany the consumer during his purchase process by providing answers in every place and at any time, favor the purchase of the product directly from your smartphone or tablet, favor the creation of personalized promotions, develop personalized caring actions in the post-sales phase and implement loyalty programs.

4. The Implementation of Omnichannel Fashion Retailing: Managerial Challenges and Implications

In this section, we present the theoretical framework on the adoption of omnichannel strategies and the key drivers that led fashion retailers to adopt omnichannel strategies and new challenges for a correct implementation. The proposed framework combines the theoretical bases emerged from the literature with ideas obtained from research on the success cases of the fashion system companies. To address this issue we started from two research questions that guided our review of the literature, as well as the theoretical framework proposed in Figure 1.

Q1) What are the key factors that have stimulated retailers (and brands) to develop an omnichannel strategy in the fashion world?

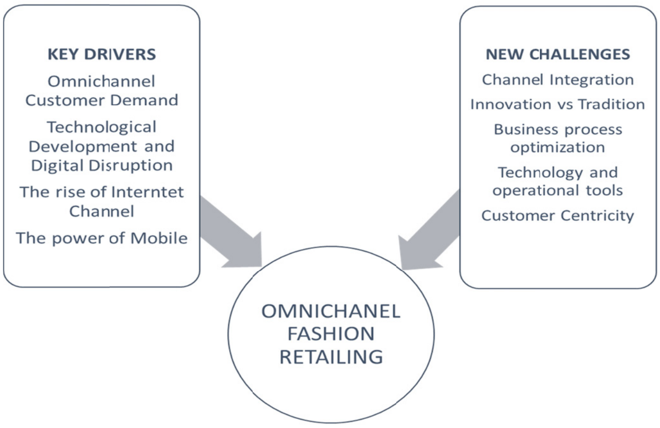

Figure 1. Theoretical framework of omnichannel fashion retailing implementation

Q2) What are the challenges that fashion and luxury retailers have to face when they decide to integrate an omnichannel strategy into their marketing strategies?

4.1 Key Drivers of Omnichannel Fashion Retailing

4.1.1 The Omnichannel Consumer

The consumer, today, is oriented towards omnichannel, he/she has not abandoned physical stores, he/she makes his/her own decisions moving between online and offline. Currently, the individuals are "always on" that means they are constantly connected wherever they are. Internet, smartphone development, the success of social media and social networks have changed consumer behavior. The customer journey is no longer linear and with reference to the fashion and luxury sector, omnichannel consumers are increasingly informed, complex, with little time, however they expect to have an ever wider selection of products, available at all times and everywhere (Piotrowicz & Cuthbertson, 2014; Altagamma, 2018). Even luxury-oriented segments have become more attentive to price, promotion and better service. The simultaneous use of online and offline channels makes it easier to compare products and promotions (Brynjolfsson et al., 2013; Strang, 2013). Among the reasons for the purchase of luxury goods, the ostentation has lost importance compared to the positive experience (Altagamma, 2018). The post-modern consumer increasingly bases his/her purchases on the advice of relatives, friends and colleagues. Since 2010 the role of the influencer has grown, having gained official recognition throughout the fashion sector.

4.1.2 Technological Development and Digital Disruption

Omnichannel fashion retailing is driven primarily by technology (Oh, Teo & Sambamurthy, 2012). In recent years, literature indicates that we are entering the era of so-called "digital disruption" (Schmidt & Cohen, 2010), a term coined by Clayton Christensen (2006). The new technology produces a radical change in existing business models. The "digital disruption" literally "destroys" the "old" business models but at the same time is able to reward the new "digital forces", allowing the creation of benefit for all stakeholders. Technological innovations have changed the shopping activity; consumers now have smartphones, tablets, innovative software, mobile applications, innovative payment instruments, coupons and digital flyers as well as beacons, location-based services and augmented reality (Rosenblum & Kilcourse, 2013). Companies try to integrate technological innovations and renew the layout of the stores with a view to optimizing the physical concept in order to guarantee a much more complex and engaging shopping experience (Rosenblum & Kilcourse, 2013).

4.1.3 The rise of the Internet Channel and the Power of Mobile

The dependence on smartphones has become a global phenomenon. Today, people spend most of their daily lives on smartphones and mobile devices. Millions of consumers monitor their smartphone constantly, day and night, while they are with family or friends, during a business meeting and while driving (Bellini & Aiolfi, 2017). The increasing penetration of mobile devices and the widespread mobile connectivity have changed the decision-making process of consumers and consequently their buying behavior. Consumers use mobile for different purposes: search for information on the web, planning the shopping expedition before entering the store, creation of a shopping list, price comparison, purchase of goods and services, post-purchase activities (Shankar, Venkatesh, Hofacker & Naik et al., 2010; Bellini & Aiolfi, 2017). The existing literature considers mobile technologies a resource to help consumers make better decisions, reducing research costs and improving the quality of consumer choice (Sciandra, 2014; Bellini & Aiolfi, 2017). The mobile has the same advantages as the online channel, with further advantages for the nature of smartphones. Mobile devices allow consumers to buy online and offline in an innovative way through an immediate price comparison, reading reviews from other customers and evaluating non-digital components in the physical point of sale (Piotrowicz & Cuthbertson, 2014).

Due to the rapid growth of the mobile channel, supported by the ease of use of the internet, in recent literature numerous researches on mobile marketing strategies have appeared. Researchers have identified several mobile marketing practices, such as mobile communication, targeted mobile couponing, email and messaging, mobile website creation and management, mobile word of mouth, mobile social network management, mobile customer care and mobile shopping (Shankar & Balasubramanian, 2009; Shankar et al., 2010; Strom, Vendel & Bredican et al., 2014). Fashion retailers and luxury brands are projecting themselves into the future by introducing visible, readable and manageable content for all mobile users and developing mobile fashion apps and social networks (Brynjolfsson et al., 2013).

4.2 New Challenges in the Implementation of Omnichannel Fashion Retailing

4.2.1 Opportunities and threats of Integration Between Channels in the Fashion Sector

The literature underlines two basic approaches for the integration between channels that can therefore occur both from the physical to the Internet and from the online towards the offline (Herhausen et al., 2015). To integrate online functions within offline channels, fashion companies provide self-service totems, virtual fitting rooms or kiosks with online assistance within physical stores (see Louis Vuitton, Pinko, OVS and Zara). This type of integration can reduce the negative effect for consumers of the unavailability of products in the physical store and provide increasingly personalized services (Bendoly, Blocher, Bretthauer, Krishnan & Venkataramanan, 2005). To integrate offline functions in online channels, fashion companies provide consumers with a store locator with information on the various physical stores of the banner and information on the availability of products in assortment in the physical store within their online channel (see OVS and Louis Vuitton in collaboration with Foresquare). According to consumers' perceptions of online integration, this method of integration can moderate the negative effect of unavailability of products in the online assortment (Bendoly et al., 2005).

Despite the optimistic view about the integration between channels, the emerging trends and positive technological changes, retailers perceive the digital channel as a great challenge to interface with in order to succeed in the new competitive environment and some of them have doubts about the future of digital channels. While some scholars support the thesis of the complementarity of the different channels with the online channel that provides additional information to consumers, reducing research costs and providing a wider range of products (Wallace, Giese & Johnson, 2004; Herhausen et al., 2015), others believe that one channel replaces another, giving rise to the so-called cannibalization phenomenon between channels (Falk, Schepers, Hammerschmidt & Bauer, 2007). Furthermore, some retailers believe that the adoption of an omnichannel strategy can increase the complexity of managing corporate operations and in particular supply chain management. As far as operational management is concerned, an omnichannel approach requires huge investments in technologies (Herhausen et al., 2015) and in order to build a successful omnichannel strategy, retailers will have to involve qualified IT personnel (Frazer & Stiehler, 2014). Furthermore, and particularly in the fashion sector, companies will have to adopt advanced warehouse management systems in order to keep track of the inventory at all times and satisfy customer demand with prompt and timely deliveries (Zhang et al., 2010), which requires not only skill, but also a wide-ranging financial investment (Herhausen et al., 2015). Retailers are afraid that their consumers might be disappointed by the lower level of service, different pricing and assortment strategies that the online channel could probably offer (Verhagen & Van Dolen, 2009; Zhang et al., 2010). For these reasons, some researchers believe that on-offline integration is a "zero-sum game", where the advantages in one channel are offset by the disadvantages in another channel (Falk et al., 2007). The integration between traditional channels and the online channel, from an operational point of view, is however able to produce synergies that reduce the costs of online operations. Once the risk of channel conflict has been avoided, companies could benefit from on-offline integration in four main areas: cost reduction, greater differentiation through the introduction of value-added services, improved relations with consumers and their loyalty to the retailer, geographical and product extension of the market in which the retailer operates (Kumar, Eidem & Noriega Perdomo, 2012).

4.2.2 Innovation versus Tradition

The digital revolution and digital disruption have "forced" fashion and luxury brands to redesign their internal and external processes by giving more and more importance to the virtual channel in which it is easier today to intercept those who buy fashion and luxury. This allowed fashion retailers to improve the entire corporate image with respect to more traditional actors while maintaining the values of their history and their tradition. Therefore, the digital must be considered as an enabler of the value and image of the brand and in the future fashion and luxury will become synonyms of digital.

The presence of fashion companies in the online channel is far from being perceived in the recent past. In fact, the American designer Donna Karan, in 1997, forbade photographers present at her fashion shows to publish photos on the Internet. For many years, excellent fashion and luxury brands have experienced the advent of digitalization and information technologies with skepticism, so much so that they accuse the Internet and new digital media of being cold, aseptic, vulgar and advocating the democratization of consumption (Grand Union Italy, 2016). Digital innovations found obstacles in the fashion sector, e-commerce was seen as a channel away from the logic of experience proposed by the fashion industry and that had little to do with the warmth and sensory experience that fashion guaranteed through tactile stimuli, visual, olfactory usable within physical boutiques, impossible to reproduce online (Grand Union Italia, 2016). The fashion and luxury sector therefore remained strongly anchored to the physical store that allowed the creation of a unique experience for consumers through contact with products and in store marketing levers controlled by fashion retailers (merchandise layout, architecture, colors, lights and sounds).

With the new Millennium, doubts about digital and the web gave way to a digital orientation. The fashion and luxury brands began a slow approach to the online channel, adapting the online channel to traditional offline concept stores. The disruptive rise of the Internet, mobile and smartphones together with the widespread connectivity of online users who wanted to participate actively in the purchasing process has "forced" fashion companies to invest in digital (Scipioni, 2005). Fashion brands began to focus more on their web pages, to communicate a coherent image, to introduce innovative services: virtual mannequins and dressing rooms, online salespeople, 3D technologies, click & collect, e-commerce sites, social networks and mobile apps. They then created wishlists, started sharing the image of a garment on social networks or contacting customer service via live chat. Today, fashion retailers are beginning to extend their digital presence through fashion apps and Facebook, Instagram and Pinterest pages where companies publish photos and direct videos of new collections, fashion shows and backstage with the aim of creating a story telling and involving consumers in the world of the brand. Thus, a challenge to exclusivity opens up.

However, fashion shoppers moving between online and offline, still want to see, hear, touch and try the product and immerse themselves in the atmosphere of the store (Rosenblum & Kilcourse, 2013). In the fashion and luxury sector, the physical store will continue to play a primary role. The digital disruption has the potential to completely transform this sector leading it to relate with the consumer in increasingly innovative ways full of experience, charm, empathy and curiosity.

4.2.3 Optimization of Business Processes

In the early stages, the transition from a multichannel to an omnichannel approach involves organizational and operational changes: for example, it involves managing the returns, the reverse logistics and the return policies (no longer post-sales service but an integral part of the purchasing process itself). The share of online returns is higher than offline as consumers do not have the opportunity to touch the product before making a purchase (Grewal, Iyer & Levy, 2004). The omnichannel approach therefore requires greater attention to managing the reverse flow of the supply chain since the customer returns an order he/she had made online to the point of sale. Since the online assortment is wider than the offline one, the customer is more likely to return a product that is not normally present in the physical store. The design of return policies is of great importance, to find the right balance between cost efficiency and the highest possible level of service (Bell et al., 2013). An efficient return system reduces transport, inventory and inventory costs (Wallace et al., 2004). In e-commerce also the return logistics is strategic: it is an element of reassurance with respect to any risks associated with online purchases (Oh et al., 2012; Bell et al., 2013; Brynjolfsson et al., 2013; Piotrowicz & Cuthbertson, 2014; Herhausen et al., 2015). Many fashion retailers are now adopting in-store returns of purchases made on the digital channel according to multiple ways of returning items: made at the store, by post or through a locker. In addition to return policies, retailers must deal with and manage demand fulfillment activities, that is all those operational and strategic activities that allow them to evade customer demand as well as all storage and transportation activities. Therefore, shipping services (click-and-collect, home delivery of online orders and in-store orders, shipping to pick-up points or automatic lockers), logistics (return logistics, systems of integrated assortment, use of online returns such as assortment, packaging in point-of-sale of orders made via click-and-collect), sales tools (possibility to see the contents of packages, tablet as support for sales in stores), the promotional activities to encourage the use of channels (financial incentives for the combination of channels, consistency of prices, store locator on the website, online information about the availability of products in point of sale by QR code or app), measurements of business performance (monitoring of additional online sales) and all the retail mix levers implemented in the various integrated channels (Zhang et al., 2010).

4.2.3 Technology: Investments and Implementation of Omnichannel Fashion Retailing Operational Tools

In order to build a successful omnichannel strategy, retailers will have to allocate significant resources to technological investments and include qualified IT personnel in the company to re-engineer business processes (Frazer & Stiehler, 2014; Herhausen et al., 2015). For example, retailers in the fashion world should develop advanced warehouse management systems in order to keep track of the inventory at all times and satisfy customer demand through fast and punctual deliveries (Zhang et al., 2010). Furthermore, the literature suggests that technology may not always respond adequately to the expectations of retailers and consumers (DeSanctis & Poole, 1994). For this reason, it is important that retailers ensure that the technology is well tested and properly developed before being implemented in order to prevent consumers from running into technical problems that could raise a wall between consumers and retailers.

The challenge remains the integration of physical and digital processes. The physical store, in any case, remains a fundamental touch point in the fashion sector. In the new context, it is essential for retailers to renew their concept stores by implementing innovative in-store technologies so that the physical point of sale can evolve from a logistics center to an experiential place. The challenge for the fashion and luxury sector is precisely to build an omnichannel approach that does not penalize experience, to bring the consumer closer to the brand in a more sophisticated, engaging, complete way, offering them a "seamless" customer experience.

The digital technologies to be implemented in the store in an omnichannel perspective are different. Among the most implemented we find *interactive kiosks* and *interactive totems*, *interactive screens* and showcases, *virtual fitting rooms, digital signage, location-based service* and *beacon technologies, RFID technology, NFC* and *QR-code, tablet* and *personal digital assistant, mobile POS, augmented reality* and *Google Glass* (Rosenblum & Kilcourse, 2013).

Interactive kiosks are touchscreen totems that allow consumers to independently obtain technical information and product recommendations or to check their availability at the point of sale or in the nearest stores, order the product online and purchase it by paying with card credit directly from the totem, avoiding the queue at the cash desk.

Interactive touchscreen displays allow the customer to view the entire range of retailers in self-service mode.

The virtual fitting rooms are equipped with a display with an invisible video camera behind the mirror, where the customer, positioning himself in front of the mirror, through the use of augmented reality technologies, has the possibility to try the whole assortment, take selfies and share photos and opinions on social networks using QR Code. Famous are the Magic Fitting Room by OVS in the innovative and interactive concept store 2.0 in the flagship store in Milan, the magic mirrors of the Miroglio Group and Rebecca Minkoff's virtual dressing room in the Connected Store Of The Future flagship store in SoHo in New York City.

The Digital Signage is a form of proximity marketing that is of proximity communication of the point of sale through electronic supports such as screens and video projectors that show the multimedia contents, linked to the brand, to consumers. The purposes can be different, from information support on products, to promotions, to educational spots, to weather or traffic information, to persuasive purposes to create digital signage inside the store in order to increase the time spent in point of sale. Other proximity marketing tools can be Location-based service and Beacon technologies, which exploit the physical proximity of the customer to the point of sale. Thanks to the apps downloaded on smartphones and the combined use of Beacon technology, retailers can send notifications, promotional and welcome messages, and personalized offers to their customers via Bluetooth.

By now, all retailers have introduced in the store the RFID (Radio Frequency Identification) and NFC (Near Field Communication) technologies that allow the exchange of data through digital connectivity in wireless mode. The QR-code (Quick Response) is a new version of the traditional bar code, which allows retailers to store a greater amount of data and once scanned by smartphone or mobile devices and retailers can access the contents of the code quickly and easily by providing to the consumer an interactive and more engaging method of communication. Furthermore, the sales staff can be equipped with tablets and other technological supports to assist the consumer during the purchase phase (personal digital assistant) favoring more comfortable payment services and solutions (Mobile POS).

To create an even more immersive experience, many retailers are implementing in their physical stores technological devices that make consumers experience augmented reality. For example, OVS introduced Google Glass in order to make shoppers go around the store looking for new products in the range. The digital treasure hunt (gamification) through the experience of augmented reality allows the customer to win a free OVSCard and 200 Glam points that contribute to achieving the benefits provided by the OVS Loyalty program.

The in-store implementation of the several innovative technologies listed above represents a challenge and a turning point in the fashion and luxury sector which, maintaining the centrality of the traditional physical store, opens up to technology and digital to evolve into a world in which the consumer can really feel pampered and gratified both inside the store and in the online channel through a multitude of digital tools at the point of sale that allow him to combine shopping, experience, customization, uniqueness, fun, innovation and tradition.

4.2.4 Consumer Centricity

Omnichannel retailing should be understood as the conceptualization of a "seamless" customer experience and the centrality of the consumer is an essential cornerstone of this approach (Agatz, Fleischmann & Van Nunen, 2008). It is about offering an easy, comfortable and engaging omnichannel shopping experience (Homburg, Jozić & Kuehnl, 2017). The post-modern consumer has different needs and is looking for products and services that respond to his/her needs in an increasingly personalized way, especially in the fashion and luxury sector. For this reason, omnichannel fashion retailers must meet the needs of their consumers by ensuring a sufficient degree of customization. This can be achieved by omnichannel retailers thanks to the information assets collected from loyalty cards, pos-scanner technologies, as well as direct and continuous contact with the consumer both in the physical channel and in the online channel. Furthermore, the best performing fashion and luxury retailers on the web have been able to communicate to their consumers contents not only related to the products they already knew and loved, but have also been able to create new desires by proposing content related to products not yet known. In fact, consumers are always in a hurry and retailers must offer them targeted, personalized, short and relevant messages to attract their attention and stimulate new needs and curiosities, positively affecting their involvement. Investing in communication is an essential feature of omnichannel retailers that must involve potential consumers with interesting and always up-to-date content. Using videos and images and storytelling to communicate with consumers and educate them about brand values becomes a necessity for all omnichannel retailers who want to convey a coherent experience to the brand's history and tradition.

In the fashion and luxury sector, it also becomes essential to intercept, engage and retain new generations through innovative and engaging channels, using a language tailored to them. Today's young people, in fact, could be potential customers on which to invest resources right now to intercept the next luxury consumers. Precisely for this reason, many fashion and luxury retailers have tried to involve potential customers through the brand's social channels. The presence on social media represents the possibility for omnichannel retailers to communicate in a two-way with consumers, to create a direct relationship with them, understanding their needs through feedback and reviews on the products purchased, to collaborate with users to develop new products and new concepts, to provide immediate customer support in the event of problems, to involve consumers in games and competitions, to launch promotions or simply to sell their products.

5. Conclusions, Limitations and Future Research

Omnichannel retailing is the conceptualization of the complete integration of all channels and the disappearance of the distinction between online and offline (Rigby, 2011; Klosek, 2012; Frazer & Stiehler, 2014) with significant business implications (Brynjolfsson et al., 2013).

We have tried to clarify the Key Drivers (Q1) and the new challenges (Q2) deriving from the adoption of omnichannel retailing in the fashion and luxury sector (Figure 1). We identified four key factors that stimulated retailers to implement an omnichannel strategy (Q1). Omnichannel fashion retailing is mainly driven by technological innovations, which allow deeper channel integration, cost reduction, wider and easier access to information and large amounts of data, and finally allow retailers to develop more effective and targeted promotions. Furthermore, the development of the Internet in a service dominant perspective has allowed retailers to create greater value for the customer in terms of additional services by offering different services along different channels, from passing from a condition of scarcity of information to a condition of information democracy (Sawhney & Kotler, 2001). Furthermore, the power of mobile, the increasing penetration of mobile devices and the consequent dependence on smartphones have significantly changed consumer behavior, their decision-making process and in general the way they live and work (Bellini & Aiolfi, 2017). Retailers have understood the relevance of the mobile channel as a sales channel and have begun to manage the mobile with the aim of satisfying the different needs of their consumers according to an omnichannel approach. We tried to understand what could be the new challenges that retailers will have to face when they decide to implement an omnichannel strategy (Q2). According to the academic literature, the ultimate goal of an omnichannel strategy is to create a satisfying and "seamless" customer experience by combining the advantages of the digital and physical channels (Rigby, 2011; Frazer & Stiehler, 2014). However, online-offline integration brings with it interesting opportunities and at the same time dangerous threats. Among these, we have the possible phenomenon of cannibalization between channels. Furthermore, the adoption of an omnichannel approach requires organizational and operational changes, especially for the supply chain, as well as high investment costs. Omnichannel retailers will have to innovatively manage various activities such as shipping services, logistics, sales tools, return policies, promotional activities, performance measurements and management of the retailing mix levers (Zhang et al., 2010). In addition to organizational changes, omnichannel retailing requires huge investments in technology and the involvement of qualified IT personnel in the re-engineering of their business processes (Frazer & Stiehler, 2014). Furthermore, for fashion and luxury retailers, it is essential to correctly manage the innovation-tradition combination. In particular, it will be necessary to renew the physical store by implementing innovative in-store technologies that will allow for optimization of the physical channel. Finally, the ultimate goal of responding to consumer demands in the best possible way and thus increasing their level of satisfaction has led omnichannel retailers towards conducting their businesses in a consumer-centric perspective.

The limitations of our work are to be found in the qualitative methodology with which we conducted the research. The theoretical framework is not generalizable. Our study, however, wants to be a first investigation on the new omnichannel retailing paradigm in the fashion and luxury sector. Future research will explore the omnichannel fashion retailing paradigm by considering additional factors not covered in our theoretical framework as well as other emerging challenges that omnichannel retailers will face in the coming years. Furthermore, we commit ourselves to test our theoretical framework with a quantitative analysis and we will try to decline the omnichannel approach in other sectors.

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Abstract

This issue of Textile Progress reviews the way that fashion retailing has developed as a result of the application of the World Wide Web and Information and Communication Technologies (ICT) by fashion retail companies. The review therefore 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 of the review considers the emergence of omni-channel retailing, analysing how retail has progressed and developed since the adoption of the internet and how ICT initiatives such as mobile commerce (M-commerce), digital visualisation online and in-store and self-service technologies have been proven to support the progression and expansion of fashion retailing. The paper concludes with recommendations on future research opportunities for gaining a better understanding of the impacts of ICT and omni-channel retailing through which it may be possible to increase and develop knowledge and understanding of the way the sector is developing and provide fresh impetus to an already innovative and competitive industry.

Keywords
Fashion, Retail, Technology, Omni-channel, Information and Communication Technologies.

1. Technology and Fashion Retailing

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 [1] and therefore an important area to review. The current review responds to the need for an exploration of the role of Information and Communication Technologies in retailing, and in particular, consideration of the influence of the Internet in the context of the fashion industry. Changes in retailing are happening in abundance and they are impacting retailers from all angles whether in terms of store location, product range or pricing and the internet has without doubt exerted the greatest single force in recent years upon retailing both in the UK and abroad [2]. New business models such as e-commerce (the buying and selling of goods and services by transferring data electronically) and m-commerce (mobile commerce conducted via wireless hand-held devices) have changed the fashion retail landscape; many recent changes have been driven by consumers' enthusiastic 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 [3]. As a result, clothing has become the fastest-growing online category of goods bought in the United Kingdom [4]. In order to manage products, sales and customer relationships, retailers require effective and innovative ICT systems, which include better Point of Sale (POS) systems, secure payment systems and integration of distribution channels to provide a clear process for retailers and a better service for customers.

Past trends have seen retailers hold large store portfolios and growth often came from increases in store space. The rise of online shopping however, has had an impact on the importance of store numbers and rather than simply adding yet another different and separate channel for making a purchase to the existing channels in retailing, which may include stores (multichannel retailing), it has stimulated a more comprehensive change in retailing as a whole. There is now a move towards omnichannel retailing, which aims to integrate the different ways of interacting with the retailer, maintain a high level of customer satisfaction across channels and allow the consumer to switch easily from one channel to another; store quality and size become more critical in ensuring that consumers still want to shop on the high street [5]. Technology affects every aspect of retailing from operating strategy to consumer behaviour [2]. 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; from a consumer perspective, it enables the provision of enriched information to support the consumer decision-making process [6]. Fashion retailers must therefore consider the integrated development of all channels to enable them to market holistically, taking advantage of all of their touch points with the consumer, including mobile devices, social networks and 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 [7]. The current review will therefore investigate innovation in fashion retail, focusing on technological developments that have accelerated retailers into becoming global fashion brands and considering factors such as retail formats, process innovations, customer experience, new marketing media and order-fulfillment technologies in the development of retail strategies.

2. Introduction to Fashion Retailing

This section will firstly define what retailing is, in order to set the context for presenting theories of growth and development and detailing the UK fashion retail market. A study of fashion retailing cannot, however, be undertaken without an appreciation of the global aspects of the fashion retail industry; this section goes on therefore to provide an overview of the global fashion retail industry, including structures in developed, developing and emerging markets to enable readers to be presented with 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'*[8]. As an industry, retailing is paramount to the economy of most nations and has a strong influence on consumers and their lives [9]. This section outlines two retail theories, 'The Wheel of Retailing' [10] and 'The Retail Lifecycle' together with a brief history of retailing.

2.1.1 The Wheel of retailing

Kent and Omar [11] examine the 'Wheel of Retailing' discussing its relevance to current day business. The wheel was developed by McNair [10] with reference to retailing in the USA. 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 the retail market 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 [10]. Hollander [12] proposed reasons why this pattern emerges from which it is evident that errors in management are made as the business grows, either through a lack of attention to detail or a lack of perspective. When these factors are aligned with consumers demanding more from the business, strategic decisions can often be made for the wrong reasons, leading to business vulnerability [9]. Today, where retailers occupy very distinctive niche 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 [11] claim that it is still valuable when examining the need for retailers to expand through new product ranges and store formats by using more innovative ideas.

2.1.2 The Retail Life Cycle

The 'Retail Life Cycle' theory was developed by Davidson, Bates and Bass [13] with the intention of challenging some of the limitations of the 'Wheel of Retail'. It critiques the Wheel's focus on the downward movement of costs and margins, when often, businesses enter markets at a more upmarket position than this model implies [13]. The Retail Life cycle is based on the Product Life Cycle [14] and works on the premise that the retailer and the format in which they trade also have a limited life cycle. This approach has implications for location and property investment, timescales for profitable trading, and changes to store formats. Studies of retailing in the USA showed, for example, that city centre department stores reached their peak many years ago [13], whereas in the UK, the likes of Selfridges, Harvey Nichols and House of Fraser have shown how to succeed through adapting to consumers changing wants and needs by adjusting their retail business to become multichannel businesses. The same retailers have also 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 to simple markets where traders sold their wares to local people; although these were basic operations they were deemed very important to the economy and were regulated in England through a royal charter [11]. As the popularity of market trading grew, the development of permanent residency close by, 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 [15], and it is suggested by Howe [16] that these traders were unable to be successful and therefore transformed their businesses into specialist stores. Moving into the 19th century, such specialists evolved into department stores, which were clothing-based in the first instance growing to offer more-varied merchandise as they developed [17].

The evolution of retailing over the last 50 years has been notable and rapid, with the results of changes in the balance of power from manufacturers to 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 (part of the Arcadia Group), although some early champions of this format did not survive, Woolworths and Littlewoods being perhaps most notable in the UK [9]. 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 adjusted its business approach from that of 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 is a concentration of larger, more powerful retailers in each sector and they are all heavily involved in the marketing of their stores and the brands that they sell [18]. In current times, fashion retailers face shorter product life-cycles, which mean that it is much more challenging to see a return on investment [9].

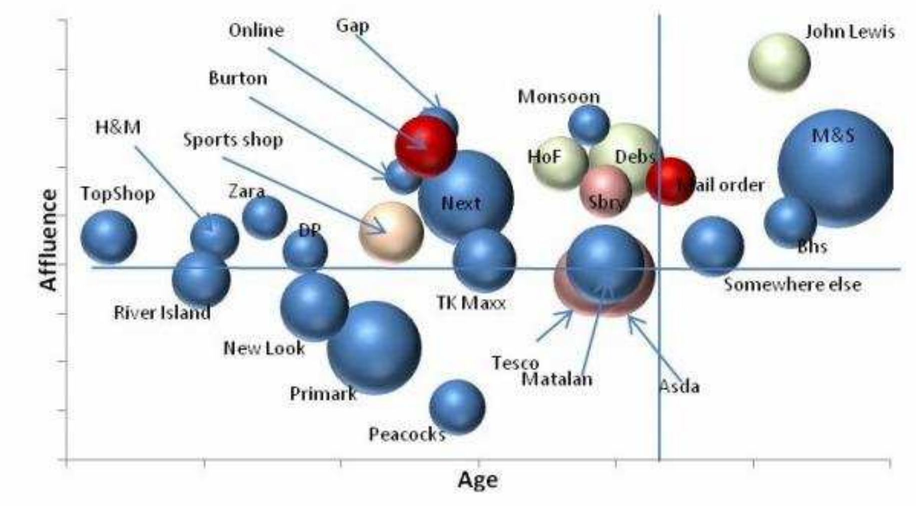
2.2.1Fashion Retailing in the UK

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 have consequently created and sustained deflation in the fashion industry up until 2010 [19]. 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 [20]. In addition to difficulties concerning pricing, 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 that is delivered to consumers at high speed; 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 the latest trends and celebrities [21].

The value of clothing and footwear in the UK is forecast to be worth £47,295m in 2014, showing year-on-year growth since the recent recession of 2.8%, which although stronger than in some retail sectors, is a relatively-weak performance when compared to pre-recession years. Prices have risen due to operating cost increases; however, because demand for fashion has become weaker, so, ultimately, retailers have had to resort to discounting, which has then lead back to pressure on margins. Retailers require skill in assessing potential demand for products and to purchase accordingly, as supply is key [22]. 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 retailer profits [23]. Growth in the sector is evident and is expected to be sustained over the next five years, favouring focused retailers who manage a multichannel strategy carefully, as much activity is attributed to sales transferring to online retailers, both established and new [24]. Fashion retailers are said to need to capitalise on new opportunities, as it is expected that innovation will sustain the category including key players such as Primark, ASOS and John Lewis, who continue to develop distinctive propositions for their respective consumer groups [23].

Jackson and Shaw [25] 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 [26]. Figure 1. shows the UK fashion retail market in 2011.

Figure 1. The Structure of the UK Fashion Market



Source: [19]

It is evident from Figure 1 that the impact of international retailers such as Zara and H&M has not only created further competition for consumer's spending, but also shaped a difficult environment for retailers in which 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 e-commerce, 'click and collect' and mobile applications for smartphones; this is discussed in more detail in Section 8. Where there were once exceptions, (Matalan and Primark originally chose not to follow a multichannel approach), these businesses are now following the trend and responding to changes in consumer behaviour. Indeed,even some of the leading international fashion retailers such as Zara and H&M were slow to respond, both waiting until 2010 to launch UK websites.

Womenswear as a retail sector is overcrowded, but this does offer a wide range of choice to consumers [27]. Evidence shows that it is the stronger, more-focused retailers that are succeeding; for example, Zara has a very clear unique selling point (or 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; Marks and Spencer are said to be suffering in this regard despite numerous efforts to change ranges and the quality of communication, however other retailers in this sector are thriving, for example John Lewis, who have attracted fashion-seekers without driving away their core consumer [27].

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 to enable readers to be presented with 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 in relation to sourcing side, has taken place over many years and has occurred largely as a result of increasing proportions of 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.' [28]

'(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.' [29]

'(Globalization is) the process whereby the world's people are becoming increasingly interconnected in all facets of their lives.' [30]

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 its 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; 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 fashion 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 seen in regard to the sourcing of fashion garments; many companies use online intranet technology such as Gerber Technology's Web Product Data Management PDM software to communicate with designers, manufacturers and quality controllers, who may each be located in a different corner of the globe, to provide product data and images tailored to meet the needs of each recipient and help them to accomplish their part of the production process.
- *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 supply-chain management 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' have become 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, given that it is 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, thereby 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; increasingly however, 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 Sections 2.3.4.1 and 2.3.4.2.

International fashion retail includes brands which are internationalising their retail operations as well as own-brand fashion retailers (both wholly-owned and part of large retail conglomerates), thereby 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 offering 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 that the retailers put on manufacturers to produce the 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 [31].

The process of internationalisation of retail has been modelled by Moore and Fernie [32] based on work by Dawson [33] and Sparks [34] representing the internationalisation of retail as a continuum of activities from invisible to visible dimensions as depicted in Figure 2.

Figure 2: The Dimensions of Retail Internationalisation [32]

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: [32]

The model in Figure 2 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 the 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) then finally to the internationalisation of operations (e.g. the opening of stores in overseas markets) [32]. In international fashion retailing, internationalisation of sourcing has taken place for many years as a result of shifting production to low-cost-labour countries, but it is clear that the 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 various 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 of the company's retailing activity across the globe.

The international retailing strategy that is adopted 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 (about which there is ongoing debate), differences in the retail environment of each 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). 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 such as production, R&D and marketing). As globalisation increases further, more weight is given to the argument that consumers are becoming 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 [9]. In fact, in his seminal textbook 'Retail Marketing', McGoldrick [9] suggests that the lines defining retail formats have become so blurred they should be considered against a series of characteristics each with their own continuum (see Figure 3) 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').

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 [35]. This branding strategy is also referred as a monolithic or mono-brand strategy [36], private label branding, store branding or the establishment of own-brands [37]. In this context, the retail-branded product would be available exclusively in the retailers own stores, and the products would typically be manufactured by a third party (contracted manufacturer) under license [38]. These fashion retailers are usually 'multiples' or 'corporate chains' with many outlets, thereby achieving significant economies of scale and buying power [9]; they have dominated the sector and the supply chain, usually wielding significant power over their suppliers and driving down prices. These particular fashion-retail formats have tended to proliferate in the value, middle and premium markets, but it is a highly-saturated format and competition is fierce. The successful value players, for example New Look in the UK have increasingly driven down prices whilst the premium fashion retailers such as Abercrombie & Fitch have focused on product quality, lifestyle and brand equity. This has left some of the more 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 the specialist retail formats has been the growth in the number of companies who were previously brand manufacturers who have moved 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 into 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 merits 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 3. 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: [9]

Department Stores

Department stores are thought to be the oldest example of large format retailing; they are large stores typically arranged over several floors, selling a wide range of goods including apparel, homewares, toys, electricals and other household goods [9]. These formats can operate at all levels of the market from value to premium with 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 their 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 itself 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 in the UK is Marks and Spencer.

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 the 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 compared with 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 price 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 [31].

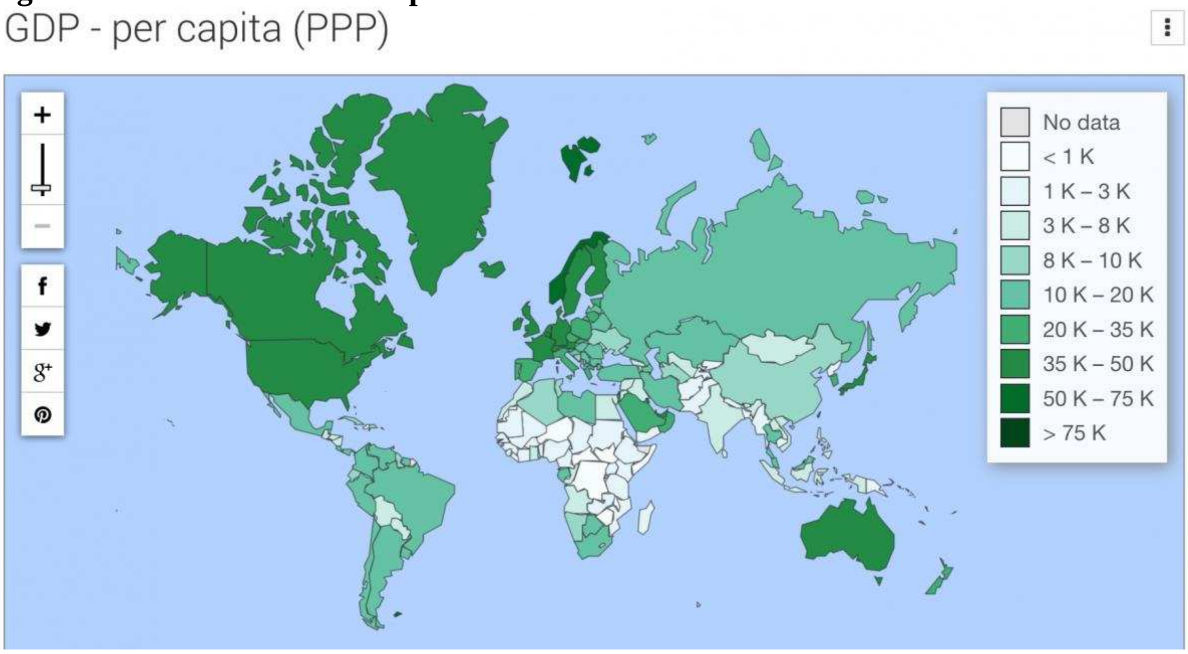
Having established that fashion retail is a global business, and discussed the challenges faced by fashion retailers operating in this context, it is important to understand the nature and diversity of the various fashion retail markets.

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, as can be seen in the map below (Figure 4) in the regions with the darkest coloration.

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 [39]. 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 nations continue to have highly-sophisticated, well-evolved and well-established fashion retail markets, with concentration of ownership in the retail sector. A 2010 analysis of the world's top 250 retailers by Deloitte [31] found that 86% were retailers with ownership in one of these developed nations and around 90% of the total value of revenue derived from these nations.

Figure 4. Global Economic Map



[40] 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 [41]. 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 changed sourcing strategies, retail format/concept innovations [42], retail theatre, in-store experience and omnichannel retailing, all of which are discussed later. 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 [31].

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 [31]

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 [43], for example ASOS in the UK now offers same day delivery of their online orders. 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 [45]. Emerging markets are predicted to be the greatest opportunity for growth for global businesses [44] 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

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

to the emerging markets for expansion and many have had significant successes in these countries.

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 [45]. 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 [46], 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 [46]. 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 [47]. 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 [48], 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 still 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 [49], 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 during the early stages of the 'Open Door' policy announced by Den Xiaoping in late 1978, despite the rapid growth of the economy. This was largely due to the heavily regulated business ownership laws which were, however, relaxed in the 1990s allowing for direct foreign ownership and paving the way for a flurry of retail expansion into the Chinese market [45]. 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' [50]. 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 [45] [51].

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 [45]. Western retailers used a strategy of market entry via high end hotels in the early days, for example via outlets in the foyers 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 has been 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 [51].

Brazil

Brazil is an emerging economy that has grown rapidly in the last 15 years and has 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 [48]. It is now the 7th biggest economy in the world [47] with a large population of 202 million [48]. 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 [45].

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 ([45]. 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 [45]. At present the modern types of retail format are few and far between. Department stores are virtually non-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 [52]. However there are growing numbers of modern shopping malls and the fashion-retail sector is ripe for consolidation of specialist multiples [45]. 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 being in the southern hemisphere, the fashion seasons are the opposite of most of the other large global fashion markets, which poses logistical and planning challenges for fashion retailers [49]. There is however, 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 [52].

India

India is considered a highly-lucrative retail market and has the largest number of retail outlets in the world (15 million outlets) [45]. Its GDP is the tenth largest in the world [47] and it has a very large, young population (average age 25) who enjoy shopping [45]. 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 able to be described as 'organised' retail in the mid-2000s according to Basu, Kalyan and Kalyan [53]. Even so, the entrance of foreign retailers has meant the organised retail sector is enjoying significant growth; in particular, the mall sector is very popular in India [45] and although to date, organised retail structure has only firmly established in the top-tier cities [53], organised retail is forecast to grow to around 20% of the total market by 2020 [54]. 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 [53]. The sector remains heavily regulated by the Indian government and there are strong protectionist measures, although deregulation is taking place slowly [55]. 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 [56]. Indeed, modern retailing in India is characterised by the development of huge, sprawling malls and shopping complexes incorporating entertainment and social spaces [54].

There is significant growth in the richer classes and a shrinking of the proportion of poor in the Indian population [56]. 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 [57], 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 [58]; [56]. 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 [55], although this is growing at a rate of nearly 50% per year [54].

Infrastructure in the Indian retail market remains poor and the country has huge diversity in terms of wealth, culture, religion and language [56]; [55]. There is however, growth in the numbers of 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 141 million and with the 8th biggest GDP [47] is Europe's largest consumer market, but one of the weakest in Europe when measured in terms of Purchasing Power Parity [47]. Retail in the Russian market is highly fragmented [59] and the market is characterised by issues with corruption, infrastructure problems, high taxes and red tape [45]. 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 offering [45]. 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 [59].

Growth in apparel retailing had been growing rapidly in Russia because of increasing customer demand from increasingly-wealthy consumers and the entrance of foreign retailers [45] but the 2008 recession hit the Russian market hard and a number of luxury retailers exited the market. However, as confidence has grown again more recently, many foreign retailers who had exited are now looking to re-enter, and those who stayed are looking to expand. Even so, current forecasts for growth in the Russian market are modest as inflation and taxation hits consumers [31], and the most recent turbulence of 2014 looks set to destabilize the region and possibly impact fashion retailing in the region.

Following the years of communism where consumerism did not really exist in this market, Russians are now eager to consume, 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 [45].

2.3.4.2 Developing Economies

A developing market economy is defined as one which has a low-to-middle per capita income [45] but demonstrates growth factors significant enough to suggest that it will quickly become an emerging market. AT Kearney [197] describe 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 their governments' relaxation of regulation and a desire from consumers to buy foreign brands. According to their definition, the top ten developing economies in terms of growth and market attractiveness include Chile, Uruguay, the United Arab Emirates, Armenia, Georgia, Kuwait, Malaysia and Kazakhstan [60].

The analyses presented in this section demonstrate 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, initiating 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 increased dramatically, therefore details of the key methods adopted by retailers in order to differentiate them from their competitors merit further discussion.

Following analysis of the retail marketing mix, attention in this section turns to marketing communication (or Marcomms) and in particular to the Marcomms mix; according to Keller [61] the pace of change in the marketing communications environment has been so rapid that it has been difficult for marketers to keep pace; technology has offered new opportunities for them to manage their brands and to continue to reach the consumer in a relevant, appropriate and cost-effective way. The key marketing methods utilised by fashion retailers are then 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*,' [62]

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 [11]. Retail marketing strategy is closely related to more general marketing strategy and works from a similar base [9], however certain elements of the retail industry dictate that the standard '4 Ps' 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 on 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 [63]. There are a number of specific elements to the retail mix that have been detailed by academics [64], and these will be discussed in this section.

Compared to fifty years 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 [11]. Another change is that brand image has become more important, as retailers have become powerful brand owners and influencers in their own rights [35]. 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 [65]. The 4 P's model can be extended to include people, process and physical evidence [25] and it is noted that in retailing, people are critical in the execution of strategy as they are the brand representatives who meet consumers. Gilbert and Time [66] define three basic tenets of the marketing mix: 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 such a way that it 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."
[67]

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 [68]; however McGoldrick [9] 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 [69] 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 situated in prime locations, but still being successful in attracting visitors despite their store design, atmospherics and overall shopping experience. Reynolds and Wood [68] 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 [70]. The opportunity to share surroundings and co-operation between retailers can enhance each retailer's performance [71]; 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 [72], 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 rein in their choice of location as planning restrictions are rife in order to protect the environment and other key local issues [11].

3.1.2 Product (selection and buying)

Fashion retail is a dynamic and competitive market and 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 [73]. The difficulty for retailers in anticipating and translating trends for their customers is challenging [73] 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 [9]. Added to customer demands, seasonality is a key factor in changing fashion ranges quickly [74] 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 [75]. In addition to the requirement of product assortment within ranges, different colourways and sizes are also required and from a logistics perspective the variety of sourcing opportunities and complications of dealing with distant suppliers [11] make it difficult to achieve the goal of the right product at the right time; a way of overcoming this is through the use of radio-frequency identification (RFID) to allows a product to be tracked which is discussed in Section 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 [76]. 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 [11]. Keller [77] 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 [78].

3.1.3 Retailer branding

Retail branding is an under-researched area [20] and differs in many ways to traditional product branding; however as Keller [79] 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 [80] 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 [35] 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"* [35], 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, Giese and Johnson [81] stated that a multiple-channel strategy is one way of building customer loyalty to a retailer's brand. It is also of note that consumers are becoming brand-aware at a younger age than ever; research has shown that this frequently happens between the ages of 15 and 25 [82] 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 [83]. 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 retailing in the UK has changed beyond recognition and has become more responsive and exciting in response 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 [84]. Alongside these larger retailers newer, more-niche own labels have evolved and the lifestyle sector of this market has grown substantially 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 [20]. The implication of strong own brands and their effect on the corporate brand-image [35] cannot be underestimated as this development has led to a number of critical aspects for retailers to control; namely store design [85], product quality, price and uniqueness [20].

3.1.5 Retail Pricing

In the ever-more competitive fashion retail environment price has come to the fore; its importance to consumers grows stronger as recessions deepen and fashion retailers seek to attract customers to their store rather than lose them to another retailer [86]. Where homogeneity is commonplace price often becomes the deciding factor in a purchase [87]. 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 [9]. 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 [88]. 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 [24]. 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 [87]. 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 [89]. 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 [24]. 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 members are well-trained and understand the consumer [9]. 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 [90]. Sum and Hui [91] agree regarding the importance of the sales person stating that it is the empathy of the sales person that is critical. Patterson and Baron [92] found that with specific reference to department stores, customers, and in particular younger customers, had 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 [25] agreed with the notion that the shopping experience can therefore create competitive advantage for the retailer. Mary Portas [93] discovered that although it is recognised that service is critical to retailer success, this is not always followed through in practice by 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 retailers' 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 [94]. It is likely that retailers in Great Britain 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 being a strong behavioural characteristic [95]. 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 [96]. The importance of store environment is evident in the literature, [9] [64] and there are a number of elements which create the environment specific to each retailer [9] . Kerfoot, Davies and Ward [97] 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 [98]. Certainly, in fashion, this presentation is critical [25], this is supported by Lea-Greenwood [99] 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 Mehrabian and Russell [100] 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 [101]; [102]. 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 [103] 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 retailers 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 [102]. 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,' (Marcomms mix) which describes more-clearly the role of promotion [104] and is the term used in the Section 3.2. In recent years, the components of the Marcomms Mix have increased further due to changes in technology and the opportunity that the internet in particular has opened up for consumers and businesses [105].

3.2 The Marcomms Mix

Solomon. Marshall and Stuart [106] 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 [105]; [107]. The availability of new media channels, in particular the internet has allowed fashion businesses to develop their Marcomms strategies and become global players very rapidly. In addition fashion retailers have specific tools which are critical to the fashion Marcomms mix [25] and these are discussed below.

3.2.1 Media Clutter

Looking at the large number of communication tools it is easy to understand why, with so many ways of reaching the consumer, the media environment has become cluttered. 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 active avoidance of messages [108]; obviously this indicates that money spend on promotion could be wasted. This "cluttering" of media channels is defined by Ha [109] as 'amount of advertising space in a medium'. Further research suggested that the effect of clutter is to lower consumers' attention levels, impede recall of the advertisement and have a negative impact upon a consumer's cognitive response [110].

3.2.2 Marketing Communications Objectives

Marketing communications objectives must be clearly defined: McGoldrick [9] 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"* [111]. Indeed Keller [79] 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 [105] summarised the objectives as; developing brand-awareness, changing customer attitudes; driving sales through changing purchase behaviour and increased footfall, objectives achieveable 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.

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 [96]. 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"* [111] 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 [96]. 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 [19]. 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 [61]. 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"* [112]. Table 3 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 heading that can be cut or reallocated in difficult economic times [113]. Furthermore, where some international retailers such as H&M spend millions on global advertising, others spend very little; Zara, for example, holds a policy of almost no advertising budget. Both companies are extremely-profitable and growing businesses which may be taken to demonstrate that there is not one retail strategy that works across the globe; each retailer needs to use different methods to promote and develop their own brand.

Table 3. Retail advertising and promotion

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

Source - [114]

Table 4 shows in some detail how retailers spend their marketing communications budgets across media types. For most fashion retailers the press is a key media vehicle. The table also demonstrates the heavy use of TV advertising by John Lewis and Marks and Spencer in particular**.**

Table 4. Main Media Advertising Spend, by Leading Clothing Retailers, 2007-10

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

Source – [19]

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 advertisement, especially if the advertisement is very strong or particularly poor. Despite changes in consumer behaviour and in technology, TV advertising continues to be powerful with regard to brand building [115]. 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 advertisement totalled 4 million over the TV campaign period, which is a outstanding result and one that 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 [107]. Magazine advertising media rates are calculated by the size of the advertisement and its position in the magazine; more importantly the magazine circulation and readership are critical in both cost and advertisement 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 [25].

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 advertisements, and offer enticements to other websites using banners and buttons. All of these are used to drive traffic to websites [107]. 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 [116], 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" [117]. This definition includes the word strategic, meaning that PR is planned and executed in a structured and considered way [118]. 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 [96]. 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 un-recognised, but which can in a stealthy and subtle way, build brands and support advertising [25]. 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 [119], 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"* [120]. Twenty percent of advertisements in the UK use celebrities as their focal point, and this number is similar around the world [121]. 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 [122]. This is achieved because all the attributes of the endorser are subsequently attached to the brand and powerful emotional feelings can be transferred [111]. 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 [122]. 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 [123] 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 [123] summarises these. The advantages being that celebrities attract attention over and above standard promotion and therefore can enhance brand image resulting in brand enhancement and possible repositioning. The negative aspects of celebrity endorsement however can have a detrimental impact on the brand; indeed the behaviour of celebrities can overshadow the brand, create negative PR and can be a costly waste of investment. The issues linked to the incorrect choice of celebrity can impact upon the brand and Silvera and Austad [124] 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 [125]. 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 [66]. Sales promotion tools vary from discounted prices, multibuy options and BOGOFs (Buy One Get One Free offers) to more specialist promotions that add value for consumers, such as loyalty schemes and gift coupons [126]. 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 [89].

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 [96]. 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.

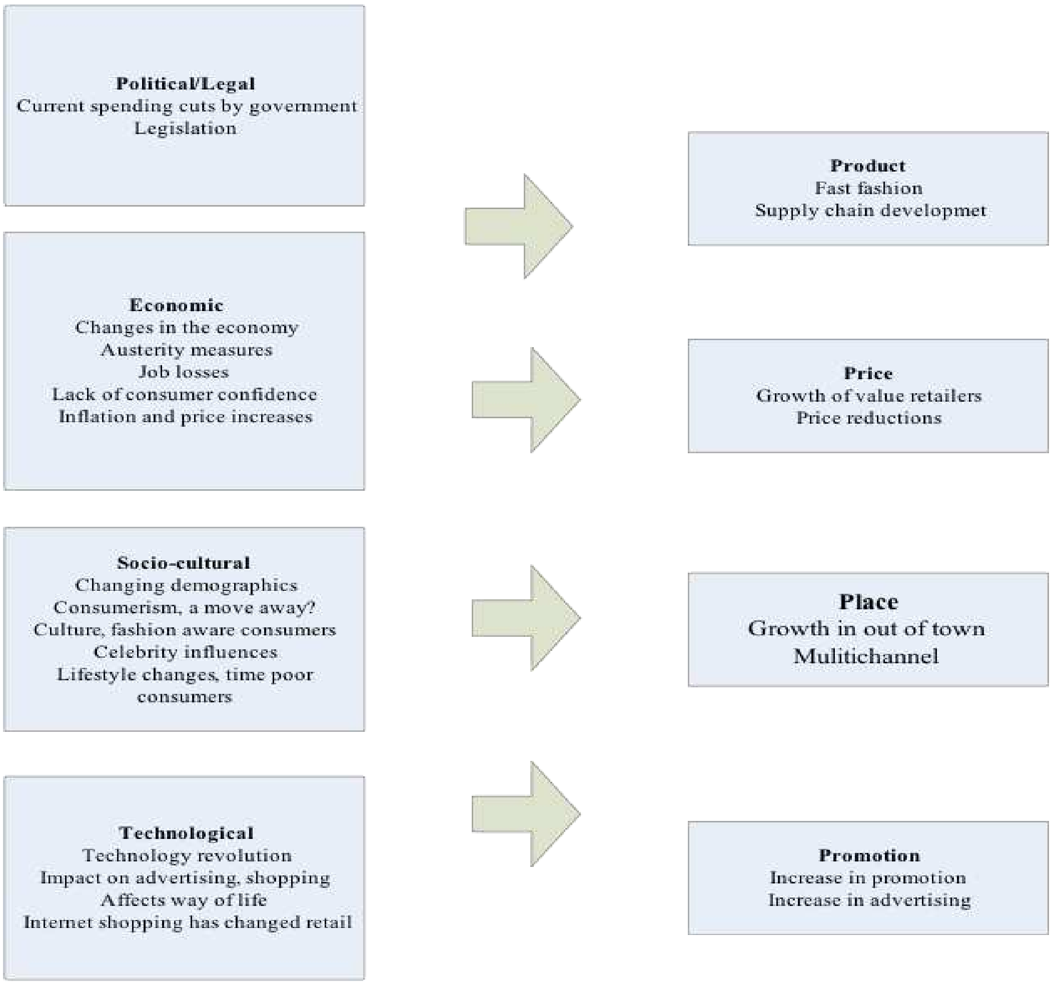
3.2.3.9 Direct Marketing
Certainly in fashion as an image-based industry, direct marketing has been seen as lacking status as a medium. It is however used by fashion businesses that recognise its power as a tool to support advertising. Certainly direct marketing has the ability to create a personal relationship between brand and consumer [127] 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 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 [96]. 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 [128].

3.2.3.10 Visual Merchandising
Visual stimulation and communication have long been considered important aspects of retailing by practitioners and academics alike [9]. Visual Merchandising is defined as *"the activity which co-ordinates effective merchandise selection with effective merchandise display"* [129], however Easey [96] 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 [97] 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, [130][73], 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 which are economic and socio-cultural; micro being the forces which impact marketing strategy, such as customers and competitors. The macro-environment is generally considered to be made up of political/legal, environmental, socio-cultural and technological factors and is often referred to using the acronym PEST.

Figure 5. PEST Framework and Impact on the Retail Marketing Mix



Source: Adapted from Mooradian *et al* 2011

The above framework (Figure 5, adapted for fashion retail, illustrates the wider external issues that retailers need to manage and understand, and demonstrates their impact 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 different ways to meet differing 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 [131].

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 [132]. Of course political and legal issues can impact retailers indirectly via any aspect of their supply chain [133]. 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 increased amount of product that retailers could source from China and ultimately played a great part in shifting world economics. Political and legal issues are often considered to be interchangeable, since it is typically a government which controls regulatory frameworks [134]. Lea-Greenwood [134] explains the effect of this in the context of fashion-marketing communications which can be 'self' regulated as is typical in developed economies, or 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. Legal restrictions in the UK can impact retail strategies such as flagship store development, which may be hindered in the UK by its 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 [135][43],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 [135]. 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 their governments and rules about foreign direct investment restricted the expansion of some retailers into those markets [45] [43].

A number of legal/regulatory issues that are current to fashion retailers in terms of how they communicate with their market were identified by Lea-Greenwood [134] and they include:

- 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 models in marketing activities 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 [25]. 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 play a key part in influencing fashion retailing, and the obvious examples of this were detailed extensively in Section 1.2 in its analysis of fashion retail structures in 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
- International groupings e.g. EU, NAFTA

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 them going to 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 that their purchasing power per person is relatively low.

4.3 Socio-cultural

Fashion retailers need to have a clear understanding of the impacts of social and cultural changes on their consumers, as these are elements that are critical to success. Retailers may be required to adapt their ranges to attract a variety of different consumers and their changing needs [136] [11], and it vital to search for niches and meet the requirements of those identified consumer groups [137]. However this is an area that is complex and difficult to manage and it is crucial that improving consumer understanding is a constant activity as the consumer is changing every day [106]. The following factors are currently important in influencing consumer behaviour in fashion retail.

4.3.1 Growing Consumer Confidence

A lack of consumer confidence had an impact on fashion retail since the onset of the recession and certainly led to a decline in fashion shoppers in the UK, particularly in the 25-54 age group [24]. A cut in the disposable income of many households due to limited wage-growth, unemployment and the rise in the price of everyday items such as food and petrol meant that consumers looked to reduce their spending on fashion [24]. However Mintel [27] 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, UK 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 [21] 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 [138]. 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 [139]. The subsequent impact of this has led to the demand for increasingly-faster supply chains [74] 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 [138]; 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, led to retailers having small ranges of product and a supply chain which was driven by the manufacturer [96]. 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 [137]. 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 [140] 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 argued that in the current economic situation, consumers are shopping with value retailers because they need the clothes rather than that they 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, 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" [87]. 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 [87]. Part of this success is due to the fact that supermarket shopping offers fashion to consumers 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 store [141]. However research demonstrates that the movement of consumers away from the High Street towards out-of-town shopping [142], is justified as out-of-town retail offers a better atmosphere, more convenience and free parking [143], 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 [72] as discussed in Sections 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, thereby putting pressure on retailers to provide this additional channel and service to consumers [144]. According to Mintel [27] 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 demand for retailer websites that are enabled for smartphone and Apple® iPads, and additionally for 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 [5] research shows that many fashion retailers are concerned about the rapidity of developments in technology and are unsure how to react strategically to meet customer demands.

4.3.5 Increasing Demand for Clothing Quality

Mintel [27] 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, perhaps implying 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 [114]; this trend will be likely to remain until the UK is out of the recession.

4.3.6 Brand Loyalty

Mintel [19] 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 [27] reported that the UK fashion market for women aged 55+ was 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 [145]. 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 [146].

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 product life cycles (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 the increasing complexity of the global apparel environment which includes *'globalisation of markets, increasing distance between industrial partners, proliferation of information, reduced time to market and emergence of code signing practices involving suppliers'* [147]. Advances in supply-chain management technology 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 [148]. 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 [149]. QR performance relied upon a network of close alliances with supply chain partners, since such collaborative relationships are a precursor to responsiveness [137]. 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; retailers such as Zara, Primark and ASOS replicate catwalk trends at high speeds providing budget versions for their customers. These companies used 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, Product Lifecycle Management (PLM) is a major evolution in the practice of innovative design and has led to the development and diffusion of numerous IT software solutions [147].

Product Lifecycle Management refers to a company strategy as well as a specialised information system [147]. Here the focus is 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. The 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 [150]. 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'* [151]. 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 that might otherwise result from the 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 [151][150]. 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 for product to reach the consumer. Parallel working also has benefits for improved product quality [147]. PLM technology delivers clear benefits to fashion retailers, but also enables suppliers to access their retail buyers' data more easily, thereby enabling suppliers to service their retail buyers more effectively. However, since there are a number of competing PLM systems available in the marketplace [152][147], suppliers that service a number of retailers may have to work across multiple PLM systems, which could increase complexity.

One example, Infor's Fashion PLM, supports fashion designers, technical product developers, brand managers and merchandisers to collaboratively plan, create, develop and source fashion collections [151]. 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 as a mobile app as well as through a desktop device, allowing users to work anytime and anywhere. Its interface is specifically designed to appeal to creative as well as technical designers. For creative designers, 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 speed 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 [153] provides a number of examples including 3D virtual sampling as a way of reducing the amount of physical samples that need to be air-freighted from the supplier's product development facilities to the retailer's headquarters. The 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 [147]. 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 [153]. The retailer is then able to carry out mechanical simulations in order to verify that the design matches the specifications supplied [147]. Although such 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. Even so, its advantages have been made clear by the example of the German sportswear retailer Adidas, which has successfully used this form of technology to remove more than one million physical samples from its supply chain over a three-year period [154], contributing to the sustainability agenda by reducing material waste and carbon emissions.

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 [155]. Supply-chain efficiencies have been fuelled by technology, progressive forms of management and the movement towards 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 [156]. Vlachos [157] conducted research into the effects of 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 [158] 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 assets 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.,* [158] that tags provide more detailed information than the barcodes which had 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 their 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 [159] allowing a retailer to innovate and replenish stock in response 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.

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 [160]. 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 fulfill 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 [161] [160]. 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. Fernie and McKinnon [160] '*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 urgent deliveries to arrive 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 managing director of one of the UK's leading premium express-delivery companies explained in an interview in 2012 how the complexity in Business-to Customer (B2C) deliveries results in higher costs compared to Business-to-Business (B2B): *'there are a whole load of add-ons that B2C customers really want – re-delivery 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 re-delivery 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' [162]. 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 consumers 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 [163]. A personal touch is added by notifying recipients of the first name of their driver. 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 recipient's front door [163]. 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 re-delivery 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 10:00am, before 12 noon, 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, communicate and receive their deliveries. Consumers have quickly adopted new technology from the internet to mobile communications and as this has quickly 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 [72] as discussed 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 [164]. According to Porter [165], the attractiveness of an industry sector and thus the average long-term profitability of firms operating therein, depends on five forces. 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. 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. However, even in unattractive industries it is possible for firms to earn above-average profits by deploying strategies that differentiate them from their competitors.

5.1 The Threat of Entry of New Competitors

The fashion industry, according to Knutsen [166], 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 [167] 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 childrens'wear 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 (firms that only sell 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 [27]. Consumers are increasingly happy to purchase high-involvement fashion products online, which is partly supported by the development in technologies designed 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 [114]. The three leading 'fashion 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 [114]. 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 for 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 [168]. 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 [169]. 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 [170] 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 has the potential to extend to great length, see Figure6.

<u>Figure 6: The Long Tail</u>

[see attached file]

Adapted from Anderson [170]

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, Hu and Simester

[171] calculated that around 30-40% of Amazon book sales are niche titles that would not 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 extend their range of products further and further, 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 5 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 5: 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-a-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 important concern for Gilt really 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 is not accurate, a number of customers may need to receive 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 sites operate is to purchase and fulfill 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, Hergeth [172] 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 [173].

This is clearly seen in Table 6 below, which shows changing market share of leading UK fashion retailers between 2005 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 6. Market share of top 10 UK fashion retailers 2005 and 2012

Rank	Retailer	2005 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

Source - Mintel, 2005, [114]

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 where 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 [174]. 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. UK fashion retail in particular is highly-concentrated within a small group of large retail companies, with 28% of consumer expenditure on apparel accounted for by fashion multiples TNS, 2008, cited in Jackson and Shaw [25]. In 2007, the top five retailers accounted for 35% of UK clothing sales [175]. 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 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 [176]. Their success is dependent on *'their ability to shape mass consumption via strong brand names and their reliance on global sourcing strategies'* [177]. 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 [172].

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 this high level of competition can lead to market exits, particularly when economic circumstance are difficult and competition intensifies further [178]. 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 [19]. 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, the UK start-up company, Grabble, is a social fashion discovery-and-commerce platform that enables users to create personalised fashion wish-lists from multiple retailers. Users also receive alerts when any of the items in their wish-list are reduced in price.

Subscription sites cover fashion, beauty and accessory categories, extend 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 where consumers can purchase from each other.

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 [20]. Consumer wardrobes in the UK are saturated, as evidenced by recent findings from consumer research. According to Retail Week [173], 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 they did 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 fulfillment means that fashion is now competing with eating out, leisure activities, holidays and travel.

6. Emergence of Omni-channel retailing

The term omnichannel as applied to retailing is still relatively new within academic research. In Omni-channel retailing, a retailer views all of their channels as a singular seamless operation [5]. As previous sections in the review 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 and brought about mainstream awareness. The retailing sector has been forced to pursue innovation driven by the most recent technical solutions because consumers have adopted the new technologies and become omnichannel consumers. There is now an expectation by consumers that information should be freely available to everyone at all times [179]; this puts an immense pressure on retailers to develop the traditional store into a model that is accessible for twenty four hours every day. However this can be equally described as beneficial as Shanka et al., [180] 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 who uses multiple devices and channels to shop, which has led many retailers to rethink their retail strategy and adopt an omnichannel approach. However the need for consistency across multiple channels is acknowledged as a key driver in multichannel retailing and marketing literature [181] [182], however there are not many retailers that have yet achieved this [180]. Drapers [5] 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 [5]. 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.

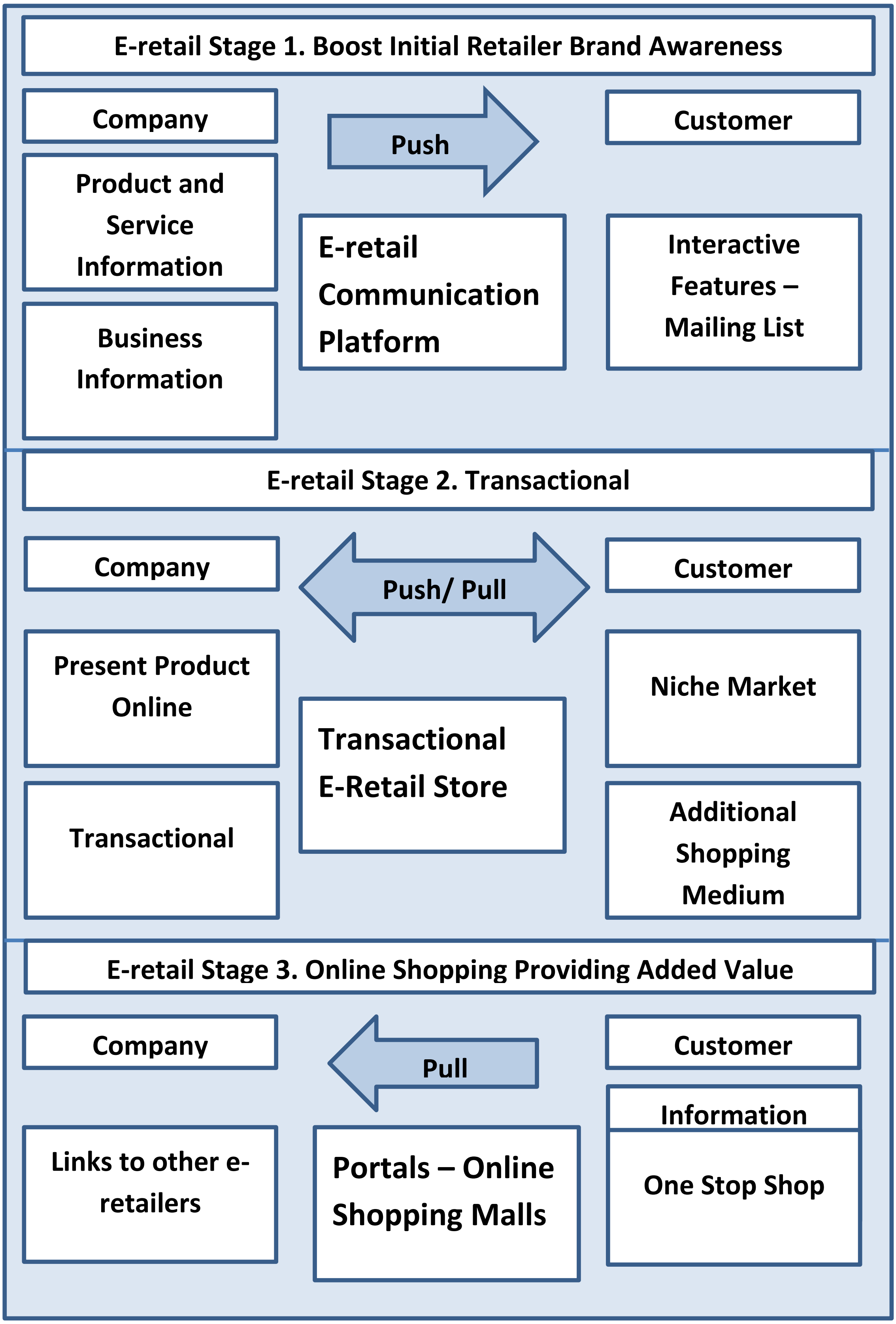
6.1 History and Growth of Online retailing

Initial users of the Internet were largely a technical audience of government agencies, academic researchers and scientists in the 1970s and 1980s. E-commerce applications expanded rapidly due to the developments of technical innovations [183]. During the mid-nineties, the commercial use of the Internet triggered high expectations in both executives and investors [184]. 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 [185]. It was over 10 years ago that Burt and Sparks [186] 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 who 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 essential [187]. A brief overview of the UK economy and online fashion market now follows, before an analysis of 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, Doherty and Hart [188] as the communication platform, presenting information regarding products and store location. Scott, Golden and Hughes [189] 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 [190][189].

Figure 7. Stages of Online Development



The model (Figure 7) 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.*, [189] 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 [191] 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 Davis, Bagozzi and Warsaw [192] 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 [193]. 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 and social change process variables have been applied [194] [195].

Today E-commerce represents a huge market for retailers in Europe with retail sales predicted to reach £111.2 billion in 2014 [196]. According to Verdict [3] 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. A.T. Kearney [197] ranked the most attractive countries for online retail in both developed and developing markets, 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 [197]. 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 [114]. According to Neilson [198] 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 [198].

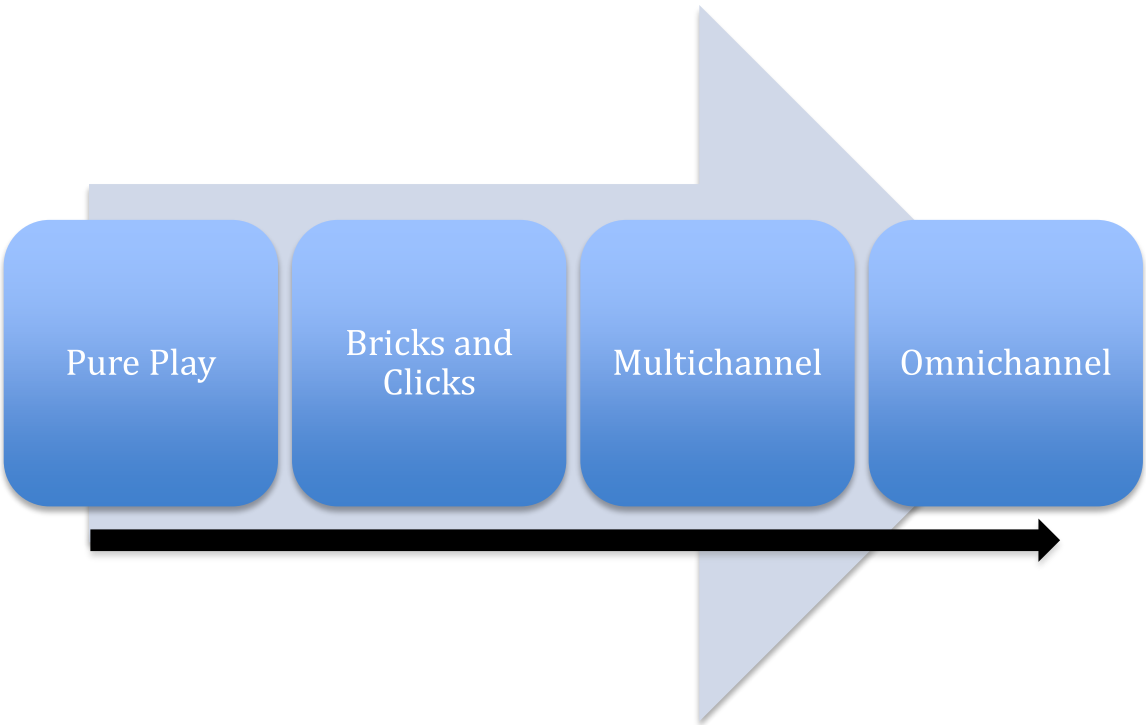
The value of the online global B2C retail market is estimated at 825 billion Euros in 2012, with the UK online retail market totaling 78 billion pounds [199]. This is predicted to see an ongoing increase in sales, rising from 12.7% of the UK online retail market in 2012, up to 21.5% before the end of this decade [200]. 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 [201].

Within the expanding online market, existing retailers are found to be experiencing increased global competition [202]. 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 [187]. It is evident 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 8 traces the development of omnichannel retailing in the UK. E-commerce 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.

Figure 8 – Omni-channel development



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'* [203]. 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 e-commerce [204], 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 Borghini, Diamond, Kozinets, McGrath, Muniz and Sherry [89] 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 [205]. Garbarino and Strahilevitz [206] 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 [207] [208] [209]. 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 in table 7 by Halaweh and Fidler [210]. Almost half of the features noted were intangible stressing the importance for retailers to build a reputation and brand.

Table 7 . 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: [210]

Similar findings to Halaweh and Fidler [210] study confirm to build trust online a secure internet environment is essential and that privacy assurance, usability and a well designed website has a positive impact on user online trust [211]. Bart *et al.*, [212] 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 [213]. 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 bricks and mortar and click businesses [214]. 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 [215]. Many academics have argued that the clicks and bricks approach is more successful than 'pure play' [216]. Turban and King [217] describe a bricks and click retailer as an organisation that conducts some e-commerce 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 [185], 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 [218] so Marks and Spencer wanted to continue to grow the business but felt it needed support from an experienced e-commerce 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, telephone-ordering and customer services systems, whilst Marks and Spencer remained responsible for the management of its website, customer service operations, warehousing and distribution. However in February 2014, Marks and Spencer launched its £150m website, terminating its seven-year contract with Amazon. Marks and Spencer executive director of multichannel e-commerce Laura Wade-Gery said *"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 e-commerce site] has tortured the system"* [219]. In a 'clicks and mortar' arrangement, it is vital that both the online and offline partner share a cohesive understanding of what the partnership's value is to the user [22]. 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 Marks and Spencer 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) [221] [222] [223] [224]. Certain studies expand on this and triangulate the mix with a third channel such as the telephone [225], catalogue [179] or both [226].

There have been a number of academic reports on the significance of multichannel strategies, especially since the option of the online channel emerged over a decade ago [227][186][228]. Multi-channel strategies are important from a business and consumer perspective [229]. 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 [230]. However the retailer's task of co-ordinating and integrating channels provides many challenging issues. Rosenbloom [227] 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 [231] 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 [216]. 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 [232]. Oh *et al.,* [232] 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 [233]. 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 [234][222].

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 'omni-channel' [235]. Omni-channel retailing may be regarded as an advancement of the integrated multichannel concept. Presently, an omni-channel 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 [236]. Omni-channel retailing can act as a future competitive advantage for a retailer [237]. According to Bodhani [238] research indicates that omni-consumers will spend 20 percent more than their multi-channel counterparts. Therefore it is useful to understand what the key drivers behind omni-channel retailing are.

What is clear from examination of the scholarly literature to date is that there is a paucity of research and insight available on omni-channel 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 [239] 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 "omni-channel". Thus a debate has emerged as to whether omni-channel is simply an industry myth or a legitimate concept that signifies an important evolution in academic research.

An interest in omni-channel 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 omni-channel 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 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 [240] and today's business models are reflecting this [241]. In future retail directors will be expected manage the transition away from single channels to a combined multichannel operations [235]. 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 omni-channel directors [235]. 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 [242], 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 [232]. Furthermore, the consequence of not adopting such an approach presents too great a risk for retailers. Piercy [240) 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 [243][244]. Based upon the literature examined omni-channel retailing may be defined as an advanced and integrated cross channel customer experience [235]. Moreover, omni-channel retailing denotes a ubiquitous shopping experience for consumers whereby multiple channels and devices will be used [237].

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 "omni-channel" to identify a single customer journey across multiple channel interactions [245]. Some of the most successful British retailers have begun to invest and implement an omni strategy with promising results [246] thus stimulating a need for timely investigation. Despite this, research by Kurt Salmon [247] indicates that whilst a number of high performing UK fashion retailers are adopting an omni-channel 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 omni-channel retailing therefore some themes of omni-channel 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 [248]. Research results by industry analysts A.T. Kearney [249] 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, Wagner, Steinmann and Morschett [250] 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 [249].

6.4.2 Connectedness

Connected consumers are part of an evolved omni-retail ecosystem [251] thus bolstering the argument of this investigation that a multichannel and an omni-channel approach possess different features. The connected consumer describes a highly customer-centric and agile retail environment [252][181][253] and also describes consumers who are willing to exploit a number of retail channels via digital means [251][252].

Stereotypically a connected consumer maybe described as demonstrating a number of other characteristics as identified in Table 8.

Table 8. Connected Consumer Characteristics

Characteristics	Citation
Actively participating in social media	Berman and Kesterson-Townes [181] Deloitte [253] Forrester [252]
Empowered	Berman and Kesterson-Townes [181] Deloitte [253]
Informed	Deloitte [253]
Interacting with user generated sites and content e.g. review sites	Berman and Kesterson-Townes [181]
Promiscuous, lacking loyalty	Deloitte [253]
Receptive to digital channels	Aubrey and Judge, 2012 [251]
Seeking personalised experiences from retail interactions	Berman and Kesterson-Townes [181]
Time poor	Deloitte [253]
Viewing a variety of types of media content	Berman and Kesterson-Townes [181]

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 [251][254][253]. 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 [251]. Shoppers are also more efficient with their shopping tasks by browsing in store then ordering at in-store web kiosk [251]. Some 50% of global mainstream consumers have embraced digital consumption behaviour [181], 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) [252]. Indeed consumers now expect to enjoy only the very latest of technology in any digital retail offering [253].

6.4.3 Single View of the Customer

Businesses operating across channels should be customer-centric [241]. A single view of the customer is achieved through the means of data integration across channels and ultimately contributes to satisfaction [255]. 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 [253]. However developing a single customer view incurs cost to the retailer [256]. It is argued that a single customer view is better placed within the omni-channel 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 [251][181][257][258]. Seamless integration of multiple retail channels recognises a progression within modern retailing and one that is beyond a standard multi-channel approach. This is because omni-channel 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 omni-channel retailing. For example cross channel behaviour requires integration to create a seamless offering

[259]. The benefits of a seamless experience is that it is one which induces loyalty amongst shoppers and thus encourages increased consumer spend [237].

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 [260], with consumers more likely to frequent a channel when they consider it to be higher quality [261]. 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 [262]. Also there is an under-researched suggestion that situational variables are a major influence in the channel selection process [239]. From an omni-channel 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 [257]. Retailers must therefore aim to reduce the number of challenges associated with moving channels to satisfy consumers and information consistency and integration [271].

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 omni-channel 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. Omni-channel 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.

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 adding a channel on to a business in reaction to consumer demand, to now being integrated to create an omni-channel channel offering. The next section will attempt to evaluate the multi-channel consumer to gain a better understanding about shopping behaviours, what channels consumers are using and why.

7. Profiling the modern day multichannel consumer

The multi-channel consumer is defined as one who regularly use and purchase from multiple retail channels [263]. With both the mean revenue and customer value of a multi-channel consumer increasing incrementally in relation to the number of channels adopted [226]. Interaction with a retailer via multiple channels is found to form stronger relationships, increased trust and lower consumer perception of risk [226], furthermore, Venkatesan, Kumar and Ravishanker [264] and Gensler, Dekimpe, and Skiera [265] 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 [266]. However the use of multiple channels within the pathway to purchase is actually found to positively enhance feelings of intelligence in shoppers [222]. McGoldrick and Collins [266] 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 [225]. For a successful omni-channel approach to be achieved there is an increasing need for a better understanding of shoppers [257] and not just the operational impact of the approach itself. Konus, Verhoef and Neslin [233] states that it is important for marketers to identify and understand segments. There is an abundance of multi-channel segmentation literature available [233][179][267][266][268] yet there is no existing research to acknowledge any segmentation in relation to omni-channel shopping.

Customers found to purchase via multiple categories of a retailer are more likely to be open to new channels and migration between channels [226]. These multichannel enthusiasts are notably disloyal to retailers [233], 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 [225]. 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 [260], however, "*increasingly it is necessary to think in terms of channels within retailers, rather than retailers within channels"* [266]. Internet shopping is commonly thought of for functional repeat purchases only, whereas shopping in store is primarily a social experience [239].

Many academic studies have focused on the multi-channel consumer by characterising the consumer group [233][269][266], understanding channel choice [270][271][224][240] and analysing the impact and effect of the multichannel environment [272][234][273][267]. Nicholson, Clarke, and Blakemore [239] specifically examined the positive and negative influences on a multi-channel 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 omni-channel 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 [274]. Pookulangara, Hawley and Xiao [274] 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 [240]. 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 [240]. Consumers who stereotypically exhibit positive cross channel behaviour include the following consumers; females, highly involved, highly loyal or experienced with retailer brand [240].

Since retail shoppers are now 'channel agnostic' [275][258] it is likewise a goal for retailers to be 'channel agnostic' in their delivery of a retail offering [276][277]. A 'channel-agnostic' approach is a way of describing a consumer's omni-channel customer experience [257]. 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 [278]. Moreover it is now an expectation of consumers that retailers have an understanding of every retailer-consumer interaction, regardless of channel source [278]. To implement an agnostic strategy business process architecture must operate across all channels and be unspecific to any one retail medium [279]. For customers, the outcome is that they should be able to select a channel or combination of retail mediums to best suit their needs [277] and do so during whichever transaction phases that they wish [276]. Young consumers are particularly labelled as 'channel-agnostic' as they are digital natives [251]. Aubrey and Judge [251] 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 [240]. Cross channel behaviour fits with omni-channel more closely than multi-channel 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 [179]. The greatest tendency for research shopping is found in multi-channel shoppers [233]. 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 [280]. 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 [267], thus demonstrating the complexity of the behaviour.

7.3 Browsing

The act of browsing primarily fulfils a hedonic need, increasing pleasure and fun [262]. The research body eMarketer [281] 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 [282] owing to the ability for a customer to abandon their search and potential purchase. Countering this, Wang [283] 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 multi-channel retailing [180]. 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 omni-channel 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 [284], 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 [285], with a trend for the simultaneous usage of devices [286] 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 [285].

A recent industry study by Microsoft [287] 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 [239].

7.4 Channel adoption

The early development of multi-channel strategy was driven by the online domain [288] where websites were seen merely as a solo channel and not as a physical extension of the store experience [289]. There was also a debate as to whether the digital channel would supersede and catalyse the demise of the traditional store channel [290]. However today the ideal is for retail channels to work in symphony as a means of "future-proofing" a retail business [266][253][239]. As a result the retailer agenda should now be concerned with optimising the consumers shopping experience by organising complementary functions across multiple channels. 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 [239]. Oppenwal, Tojib and Louvieris [261] 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 [291]. However retailing has progressed and the need for combining a range of channels has largely been triggered by changing consumer lifestyles [239]. Today's consumer will now move back and forth between an array of channels before making a purchase [285]. 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 [292]. In line with omni-channel Gensler, Verhoef and Böhm [292] 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 effect 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 [285][239]. 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 [293] thus correlating with literature that associates the usage of multiple channels with the formation of deeper relationships and increased trust in their capabilities [226]. This is crucial for retailers as the major consumer characteristics influencing the adoption of a channel are formed upon the individuals' aversion to, or acceptance of the risks involved [294]. 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 [287]. Furthermore the Nicholson's *et al.*, [239] 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'* [295], 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 [296]. Importantly there are few studies, which look at how consumers use channels in combination with one another [261]. Poloian [155] 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 consumer online time is now spread between four primary media devices; PC and/or laptop, TV, tablet computer and smartphones [297][298][285][293], 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 [253]. 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 [221] [222] [223] [224].

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 [299]. 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 [300][301]. 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 [302][303][304]. Some of the more traditional understandings of experience do not include social aspects in their definition, however more recent conceptualisations such as Verhoef, Lemon, Parasuraman and Roggeveen [305] and Gentile, Spiller and Noci [306] do. Social interactions can be interactions with staff and other consumers in-store. Hu and Jasper [307] 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 [308]. Krishna [309] when researching marketing in a broader sense defines sensorial marketing as '*marketing that engages the consumers' senses and affects their perception, judgement and behaviour'*. Developing theory from both psychology and from marketing, Krishna [309] 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 [309].

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 [300].

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 [310][19]. Home shopping decreased by 7% in value sales in 2012 [168]. 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 [168]. However, the platform retains value as a branding device and an effective tool with which to drive existing custom online [273] rather than a key channel within the omni-channel retail mix.

7.4.3 Offline: TV shopping
Television shopping is a mass-media channel [311] that is therefore broadly targeted and provides a rich experience [312]. 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 [168] 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 [201].

TV shopping retailers are taking heed of this trend, pre-empting potential future struggles in the increasingly digital market by moving into online commerce. 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 [313].

Television has evolved into a catalyst [287] inducing consumers to visit a web address, stream live online [255] 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 [286][285][286]. 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 [311] and the consumers of TV shopping can be more effectively reached online [273]. Especially when the convergence of internet access and television via 'smart TV' [201] 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 [314], with half of UK smartphone owners shopping (e.g. browsing) via their device, and a third continuing to purchase [199]. Recent market research shows a skew towards male smartphone shoppers in the UK with over half of those males being younger than 34 [315], 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 [285]. 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 [316], 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 [317]. 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 [150]. Two thirds of tablet owners have made a purchase from a tablet [199] with commerce related queries ranking highly on the device's usage [318]. 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 [319]. Despite the mobility of the tablet device, they are usually used at home [285][318] the current primary usage being for personal entertainment [285]. 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' [320][319][269]. However recent observations conclude that tablet usage is uniquely characterised, with owners demonstrating user behavior and intent exclusive to the device [318]. 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 [321]. With tablet commerce set to triple in sales this year on global scale [281] it is clear that as a channel, tablets will form an important piece of the omni-channel 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 [322] 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 [298]. Yet there has been an 11% decrease in worldwide PC shipments during second quarter of 2013 [150] 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 omni-channel 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 [255]. Moreover, it will also benefit a retailer's ability to gain maximum insight into a consumer's lifetime value and the most beneficial channel synergies. The key finding is the ever increasing blurring of the boundaries between channels [5] [180] 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 [222][318][179]. 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 omni-channel strategy, which means rather than using each channel separately or individually as in multichannel retail, rather simultaneous use of shopping channels. Berman and Evans [323] 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 omni-channel 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 [324]. A new era of retailing has developed through greater convergence [253][325]. Now the role of managing the retailer's brand through the convergence of channels is of paramount importance [305][325]. The next section reviews some channels and technology solutions that can help fashion retailers develop their retail strategy, widen their reach and improve the customer experience. Many of the technologies discussed are currently very niche and at experimental stage and academic research needs to be conducted to gain a better understanding of the impact on retail strategy.

8. 1 M-commerce and Fashion Retail

Consumers using multiple retail channels within their path to purchase are inherently more valuable [326] 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 [274]. This ties with the recent market research that 77 per cent of UK shoppers have 'showroomed' at least once in the last six months [327] and Google's [285] 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 (LBS) are applications that are available when a mobile is close by and utilise tools such as the Global Positioning System (GPS), Radio Frequency Identification (RFID), Near-field Communication (NFC), short-range wireless network-linking technology (Bluetooth), wireless local area networking technology (Wi-Fi), Mobile internet Applications software (Mobile Apps) and Quick Response two-dimensional bar codes (QR codes). GPS is commonly used to provide information about outdoor locations such as specific place locations, traffic statuses and directions to destinations, whereas RFID (Radio Frequency Identification) is used for location tracking for indoor smart applications [328]; 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 [114]. 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 [329]. Foursquare [330] is a LBS application (app) that has over 50 million users and nearly 2 million business contacts [330]. 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 [329] 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 [331] (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 [332]. However research on RFID tracking for marketing purposes and consumer-oriented research is scarce [333]. Boeck, Roy, Durif and Gregoire [333] 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 [334], 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.,* [333] 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 beacons, 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 1 – Image of promotion and Bluloc beacon.

Images: (www.bluloc.com) [335]

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 [336]. Wong, Leung, Guo, Zeng and Mok [337] 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 Wi-Fi

As well as communicating with customers via GPS and RFID, more fashion retailers are beginning to offer free Wi-Fi 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 [3]. 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 [338]. Having more product information via apps or on a website when customers are in store, may inspire consumer to look for additional products [339]. If customers have to login in order to receive Wi-Fi, 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 Wi-Fi. 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 [3] 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 Wi-Fi 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' 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-centred, encouraging purchasing intentions and increasing brand recognition. Amazon, for example, have an app called 'Amazon Flow' which is an augmented-reality app that has the ability to 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)

Image 2 -— 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 [3]. 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 omni-channel 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. Touch-screen devices differ in presentation, processing and interaction modalities from desktop computers [340], allowing a different form of digital interaction with products than is possible on desktop or laptop computers. Touch-screen 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 [341][342][343]. New advances in technology for e-commerce and mobile commerce exploit the touch-screen 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 [344] 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 [345], then the lack of touch and feel which characterises online shopping may lead to increased perception of risk. According to Padilla et al, 2013, 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 [346] 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.

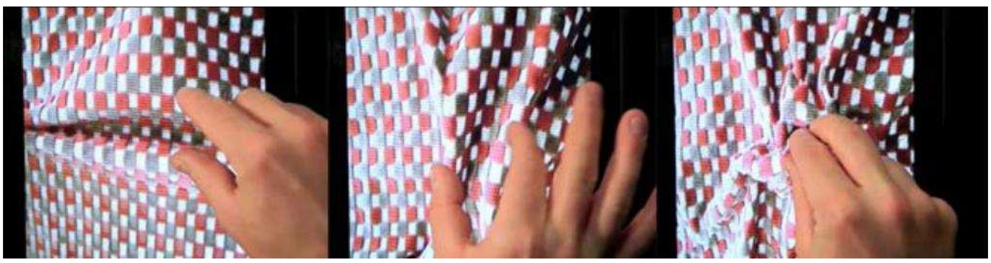
The development of various forms of image interactivity technology (IIT) makes online fashion shopping more accessible and tangible to consumers [347]. The theoretical underpinning for the study of IIT lies within the broader domain of atmospherics. This refers to the application of environmental psychology to marketing and can be defined as *"the conscious designing of space to create certain effects in buyers"* [302]. Just as the physical environment influences various psychological and behavioural shopping outcomes in a bricks and mortar store [348][303], 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 [349]. IIT can reduce perceived product risk and increase hedonic value of the online shopping process [350]. 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 reduce perceived risks and create positive attitudes toward the retailer [351]. Rotation (360 degree spin) positively influences cognitive (perceived information), affective (mood), and conative (attitude and behavioural intention) outcomes [352]. Mix-and-match technology results in greater purchase intentions, revisit intentions, time spent on website and attitude towards website [353]. Personalised 3D virtual try-on positively influences utilitarian value and purchase intention [354]. Interactivity increases consumers' perceived hedonic value [355]. 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 [354][351][352][350][356][353][357]. 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 [352]. Some visualisation technologies, such as zoom and 360 degree rotation, are relatively commonplace and well established, whilst others, such as digital scrunching and virtual fitting rooms, are still at an experimental stage.

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 in academia 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 [358], user-controlled interactivity was incorporated in order to increase cognitive and affective responses [352]. Interactivity controlled by users allows for a synaesthetic response between the subject and the media [359]. Figure 19 below shows the user digitally scrunching fabric on a touch-screen 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 [341].

Image 3 - Shoogleit multi-gesture interface on touchscreen device [341]



8.2.2 Virtual fitting rooms

According to Fogg [360], use of an Augmented Reality Interface for Tele-operation (ARITI), a software framework, 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 [350]. Thus, as is expected, ARITI has persuasive effects on increasing the buying intentions and behaviour of consumers by stimulating mental imagery. Consumers' perceived risks associated with online shopping are greater than those associated with other shopping modes [361], due to inconsistency among fashion retailers in terms of size and fit 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; an avatar with the consumer's exact measurement is then 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 the particular garment, see Figure 20.

Image 4 – 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 [362]. 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 [363][364][365]. Studies have proven that various body shapes, even within specific size categories exist [366] therefore by using body scanning technology consumers would be able to have an accurate understanding of their body measurements, size and body categorisation. Whilst more are possible, 3D body scanners take between 160-200 body measurements in order to replicate the exact body dimensions of the customer. Companies such as Bodymetrics [364] have developed scanners that, once the body dimensions have been calculated, can provide information about the most-suitable brands within a particular retail environment for a customer, by matching garments to the consumer's body shape.

Figure 5. Body scanning technology

Source: Bodymetrics [364]

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 Lagerstam, Kärkkäinen, and Väänänen-Vainio-Mattila [367] 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 [368]. 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 [336].

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).

Image 6. Magic mirror augmented reality and image capture
Source: Magic Mirror [369]

Poncin and Mimoun [370] 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 Hsu [371] 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 [350]. 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 [372], 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 Omni-channel Initiatives

The rise of multi-channel 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 touch-screens, 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 fulfillment and returns; therefore current delivery and returns initiatives are discussed in section 8.3.2. The final omni-channel initiative to be discussed is looking at how fashion retailers 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 [373]. 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 [372].

8.3.1 Self-service technology

Increasingly, information technology interfaces are being integrated into brick and mortar stores, such as self-service checkouts [374], express-order terminals and multi-media kiosks [375]. Conversely Kallweit, Spreer, Toporowski [376] outline that there are two types of self-service technologies, those that are transaction-focused, allowing customers to scan, pay or place an order [377] and more recently customer-service or information-related technologies [375]. 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 [378]. Wang [375] 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 [375]. In Kallweit *et al.*, [376] 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 [379][380][381]. 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, Pantano and Virgilio [382] 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 [383]. 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 Image 7). 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.

Image 7 – Marks and Spencers iKiosks

Source: Polytouch kiosk by Pyramid Computer GmbH [384]

In Kallweit *et al.*, [376] 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 [374]. 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 [6]. 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"* [383] 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 [385]. 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 [386]. 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 9. 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.

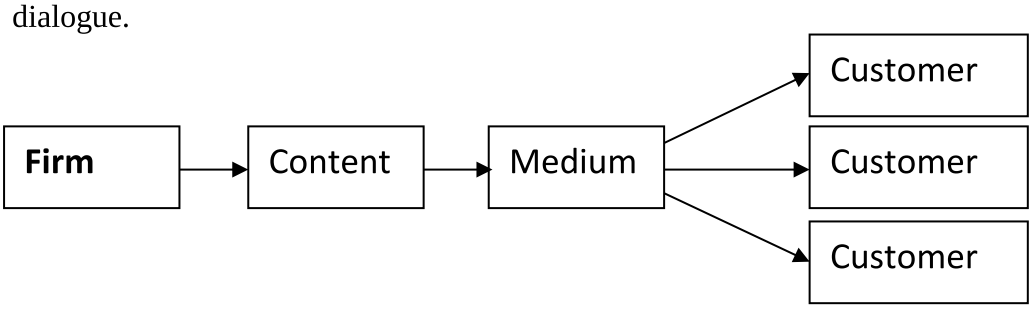


Figure 9: Traditional marketing communications model based on Hoffman and Novak [387]

Figure 10 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.

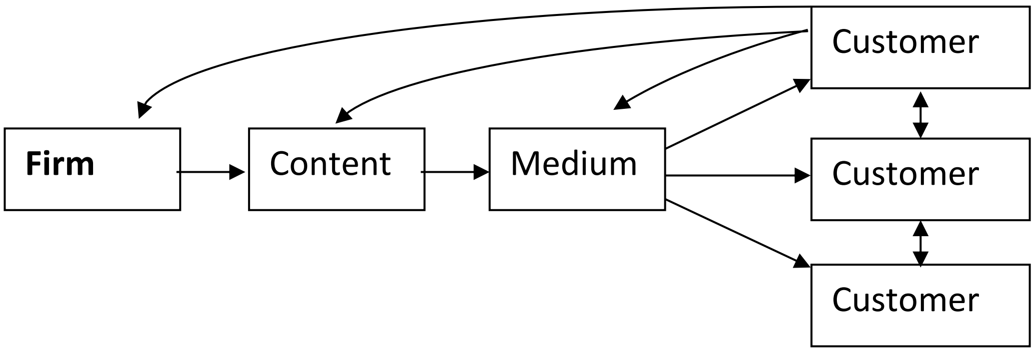


Figure 10: Web 2.0 marketing communications model based on Hoffman and Novak, [387]

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 [388]. 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 [389]. 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 [390]. 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 [391]. Direct customer involvement and UGC lead to powerful network effects and the creation of user communities [392]. 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 9 below shows the top retailers on social network Facebook in terms of fan base, the vast majority of which are fashion retailers.

Table 9: Top 25 online retailers by Facebook fans, Q1 2014

Beginning of Q4 rank	End of Q4 rank	Retailer	January Like Count	March Like Count	Q1 Growth #	Q1 Growth %
1	1	Walmart	34,432,004	34,513,209	81,205	0%
2	2	Victoria's Secret	23,717,995	24,534,854	816,859	3%
4	3	Amazon.com	22,613,537	23,520,214	906,677	4%
5	4	adidas Originals	22,387,836	23,053,063	665,227	3%
3	5	Target	22,699,626	22,721,330	21,704	0%
6	6	Levi's	20,972,284	21,255,411	283,127	1%
9	7	WWE	14,813,897	17,462,335	2,648,438	18%
8	8	Nike	16,139,195	17,071,674	932,479	6%
7	9	Burberry	16,822,466	17,025,676	203,210	1%
10	10	Macy's	13,804,457	14,119,567	315,110	2%
11	11	Victoria's Secret Pink	13,780,658	14,004,522	223,864	2%
12	12	Lacoste	12,393,540	12,996,437	602,897	5%
74	13	Pampers	1,884,967	12,872,088	10,987,121	583%
13	14	Gucci	12,014,425	12,558,302	543,877	5%
14	15	Hollister Co.	11,237,564	11,580,696	343,132	3%
15	16	Kohl's	10,833,515	10,920,462	86,947	1%
16	17	Apple Inc.	10,122,147	10,802,278	680,131	7%
17	18	Aeropostale	9,753,232	10,141,166	387,934	4%
19	19	NFL	8,861,268	9,877,771	1,016,503	11%
18	20	American Eagle Outfitters	9,468,911	9,569,289	100,378	1%
20	21	Forever 21	8,744,187	9,066,913	322,726	4%
21	22	Abercrombie & Fitch	8,259,448	8,539,147	279,699	3%
24	23	Dolce & Gabbana	7,710,401	8,405,974	695,573	9%
23	24	Tommy Hilfiger	7,843,652	8,325,616	481,964	6%
22	25	Old Navy	8,054,400	8,153,584	99,184	1%

Source: ChannelAdvisor, 2014

Social media channels facilitate immediate, interactive and low-cost communications [393] 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 [394] and strengthen relationships with consumers. Kaplan and Haenlein [395] 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 [1].

Brands may also derive value from social media by real-time feedback on existing products or potential new launches [389]. 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 [396]. 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 [397]. This illustrates how brand community members play an active part in the brand's life cycle [398].

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 [399]. Literature suggests that it is the consumer, rather than the companies, that now controls how brands are created, developed, rejected and destroyed [400][386]. 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 [401]. 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, Kozinets and Shankar [402], 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 [400].

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 [403], 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 [404]. 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 [404]. Kim and Ko [404] 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. User-generated content (UGC) on social media is becoming a rapidly growing source of brand conversations and consumer insights [386]. 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 [405]. 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 [405]. Although social media marketing is still an emerging discipline, Divol, Edelman and Sarrazin [406] 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 advertisement 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 [409]. With its highly visual focus, it is very well suited to fashion retail [407]. 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 [408][409] 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 [409]. 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 10 below shows an integrated social media strategy for premium fashion retailer Michael Kors across a number of key platforms [410].

Table 10: Michael Kors' social media matrix

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

Source - adapted from [410]

Shopping and social networking activities are merging and new research is being conducted with regards to online social shopping [375][411].

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 omni-channel 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 [412]. Hence convergence of channels is simply not the melding of technologies but it is about exploiting the new and unique opportunities that arise as a result of these combinations [413]. A key challenge is now looking at how new technologies will be combined seamlessly and how consumers interact with these media [413]. With the emergence of omni-channel 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 omni-channel retail strategies;
- understanding the omni-channel 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 omni-channel retailing. This is because the theme encapsulates a highly advanced seamless customer experience across channels as aforementioned by Wind and Mahajan [413]. Omni-channel 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 multi-channel 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 [253] 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 [414]. 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 [72]. This development questions the function of a physical store as a place to stock inventory; however it is dependent on high levels of digital prowess to be successful.

There is good reason to focus on the ways that digital and mobile technologies are affecting retailing, however, the strategy adopted by 'manufacturer brands' as they have moved into the retail business and opened their own retail outlets in an attempt to garner more control over their channels to market, has resulted in the exciting development of innovative flagship stores, which also merits further study.

This issue of Textile progress reviews research outputs and academic and industry publications that have addressed the subject of fashion retailing in the past to the present date and considers some developing possibilities for the future. It provides 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 current driving force for change. The development of ICT technology has also played a key role in the development of the modern fashion industry, for example by enabling communication to take place across the globe instantaneously, allowing buyers to maintain the necessary contact with their overseas suppliers, retailers to manage inventory and fulfillment and to provide information technology relevant to consumer usage to improve their in-store experience. There is a strong focus on multi-channel and the future likelihood of the emergence of the omni-channel consumer, identifying some of the current research themes about cross-channel consumer behaviour and finally summarising some of the current retail initiatives taking place across the different channels. As consumers have access to multiple distribution channels such as 'brick and mortar' retail, e-commerce, mobile commerce, and more recently, social media commerce, there is a growing academic literature regarding their adoption and use and the factors that influence purchase decisions [385][415]. However the final point to consider concerning omni-channel retailing is that whilst it is seamless and integrated, it is able to provide a ubiquitous experience, as channels can be accessed anywhere and at any time, using a variety of devices; future research should therefore, not only consider the distribution channels, but also analyse 'What', 'Where' and 'Why' consumer interactions are taking place.

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ACADEMIC PAPER

Buyer behaviour for fast fashion

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Abstract

Purpose – This paper seeks to address the complex nature of fast fashion buying through case studies with a supermarket, department store and own brand label. The phenomenon of fast fashion raises questions about traditional approaches to sourcing and buying, which are addressed here.

Design/methodology/approach – Case studies were compiled with companies managing fast fashion, alongside other purchase and retail activities, namely a supermarket, department store and specialist fashion chain.

Findings – Reveals the buying practices for fast fashion, namely, a combination of global and local suppliers, a leagile approach is typical; trust is an important factor in the supplier-retailer relationship to ensure fast delivery at an agreed quality; and integration of key internal activities and processes to facilitate the speed of buying decisions that may be required.

Originality/value – Gives insight into the factors affecting buying behaviour for fast fashion.

Keywords Fashion industry, Buying behaviour, Suppliers, Sourcing

Paper type Research paper

Introduction

The fashion industry is turbulent and certain factors have driven this change (Kilduff, 2005), particularly overseas sourcing to take advantage of cheaper labour costs. The industry can no longer compete on price alone, and thus is facing tough competition from low labour cost countries (Jones, 2002). In fast fashion, sourcing and buying decisions are compounded by the speed by which decisions have to be made and innovation introduced into the store. Fashion consumers expect and thrive on constant change and so new products have to be available on a frequent basis. This fast turnaround is achieved through sourcing new suppliers with different products and having a relationship with existing suppliers who understand the need for change and have the capability to deliver this.

In fast fashion, buying activities play a crucial role through supplier selection and product decision-making, and indeed, buying is arguably changing from purely operational to much more strategic. This paper addresses the complex nature of fast fashion buying through case studies with a supermarket, department store and own brand label. It is proposed that effective buying behaviour for fast fashion focuses on the management of a portfolio of suppliers, relationship building, as well as interfacing effectively with internal activities.

Dynamics of fast fashion

The fashion retail market is split into a number of segments – luxury, high street, and supermarket/out-of-town discounter. Gannaway (1999) suggests that "supermarkets

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are racing to make apparel an even smarter cash generator". The entrance of supermarkets into the clothing market has increased competition and redefined how customers shop for clothing, with time-starved customers able to purchase cheap fashionable clothing as part of the weekly shop, rather than visiting the high street. Indeed, fast fashion is a growing phenomenon in the UK.

Zara is a specialist fashion chain and an important example of a fast fashion retailer, with rapid stock turnaround and vertical integration. Indeed, Zara is credited with being a leader in fast fashion (*The Economist*, 2005; *Strategic Direction*, 2005, Foroohar and Stabe, 2005). However, contributing to Zara's success is its focus on a limited range of and basic shapes, so that it deals with a rather narrow product range. However, fast fashion does not apply to the whole range in stores, and as much as 80 per cent of goods may be core and basic lines, with fast fashion accounting for up to 20 per cent (Mintel, 2002a, b). The cases explored in this paper are offering fast fashion in addition to other products. This raises the question of how are the demands of buying for fast fashion met alongside buying activities for other lines?

Timing is a priority

Fast fashion has the objective of getting clothing into store within the shortest time possible. This has resulted in an increasing number of "seasons", and shipping times from suppliers must be taken in to consideration (Mintel, 2002a, b). Distance is key – goods from China can have a shipping time of 22 days, compared to five days from Turkey (*Financial Times,* 2005a, b, c, d, e, f). Retailers are switching production to Eastern Europe, Turkey and India, in response to competition from fast fashion specialists, such as Zara, who are able to push the latest trends quickly by sourcing closer to home (*Financial Times,* 2005a, b, c, d, e, f). Some high street retailers are sourcing and buying on a weekly basis to introduce new fashionable items and to replenish stock.

Companies in the fashion industry are increasingly using time as a factor for enhancing competitiveness. Development cycles are becoming shorter, transportation and delivery more efficient and merchandise is presented "floor ready" on hangers and with tickets attached (Birtwistle *et al.*, 2003). In response to the pace of fast fashion, companies in the Far East are becoming increasingly adept at moving from the manufacture of commodity products to incorporating design and branding.

Cost factors

Cost is still uppermost in the buying decision and companies are taking advantage of lower priced products from overseas (Lowson, 2001; Mattila *et al.*, 2002), often from the Far East, Italy, Portugal and Turkey (Vinhas Da Silva *et al.*, 2002). In 2004 developing countries accounted for nearly 75 per cent of all clothing exports (*Financial Times,* 2004), and more recently, with the removal of trade quotas, companies have greater opportunity to take advantage of goods from low-cost overseas manufacturers.

Fashion buying cycle

The traditional fashion buying cycle is based on long-term forecasts from historical sales, and occurs one year before a season, with leads for orders placed six months prior to product launch (Birtwistle *et al.*, 2003). However, there is a risk of inaccuracy from out-of-date data and difficulties in predicting popular sellers (Birtwistle, 2003). It is estimated that merchandise sold at mark-down price has grown to over 33 per cent, that one in three customers cannot find goods required in stock and that pre-season forecasts errors may be as high as 50 per cent. In comparison, forecasts based on 20 per cent of sales had errors as low as 8 per cent (Fisher and Raman, 1996, cited in Mattila *et al.*, 2002). Constant reductions and sales aim to get rid of unwanted stock quickly and replace this with more fashionable items.

In companies with a focus on fast fashion, buying can occur frequently, even on a weekly basis (Kline and Wagner, 1994):

> [. . .] so there'll always be something being bought every week, whether it'll be one line or 20 lines. It depends on what stage they're at in their placing order stage. You know, from a buying point of view, they wouldn't say oh I'm . . . and sit down and place all their orders, it's not like that. It's just very ad hoc, it's just reacting (Interview Merchandiser, 24.2.05).

A frequent buying strategy results in higher overall costs, but reduces excess stock/markdowns and out-of-stock/lost sales.

By using quick response (QR) companies aim to reduce both excess stock holding in the supply chain and risk associated with forecasting as product specifications are not finalised until closer to delivery (Birtwistle *et al.*, 2003). The focus is on demand rather than forecasting, which requires close partnerships between the retailer and its suppliers (Birtwistle *et al.*, 2003). However, companies recognise that a quick response strategy can result in forecast accuracy as high as 95 per cent, with 95 per cent sell-through and goods delivered directly to store (Mattila *et al.*, 2002).

When product is manufactured in low-labour cost countries such as the Far East, replenishment/re-manufacture is not practical due to long-lead times. Indeed, the decision to source globally may be made without consideration of the true costs associated with such a move (Mattila *et al.*, 2002). Hines (2001) identifies a number of hidden costs associated with overseas sourcing, whilst transportation delays, costs and quality issues are also problems (Lui and McGoldrick, 1996; Popp, 2000).

Many companies use a combination of manufacturers, with low-cost basic lines supplied by the Far East, fashion lines supplied by North Africa and Eastern Europe, and replenishment/re-manufacture from UK manufacturers (Birtwistle *et al.*, 2003). An off-shore/local sourcing mix is one strategy a retailer may adopt.

Approaches to supply-chain management for fast fashion

The increasing size of retail organisations and homogenisation of merchandise means vendor selection is a key activity (Moin, 1986; cited in Wagner *et al.*, 1989). Many vendor selection criteria are particular to the retail industry, such as the role of the buyer in meeting company profit objectives, and that goods purchased are intended for re-sale. Consequently, retail buyers use information regarding sales history, merchandise fashionability (Wagner *et al.*, 1989) and supplier ethics (Shaw and Tomolillo, 2004) for vendor selection.

Important factors of negotiation for buyers include responsiveness, price, time of payment, stock keeping, cooperative activities, volume, delivery times and physical distribution, product quality and specifications, manufacturer assortment (Bowlby and Foord, 1995; cited in Hansen and Skytte, 1998). The fashion buyer makes trade-offs between factors, especially price, packaging, assortment, and delivery (Dandeo *et al.*, 2004). In a fast fashion environment, time and cost are the key parameters dominating vendor selection.

Often, fashion companies combine agile (Abernathy, 2000; Naylor *et al.*, 1999) and lean supply chain management to respond to changing markets through rapid replenishment (Iacocca Institute, 1991; Hiebelar *et al.*, 1998). The use of information technology to share data is crucial for agile supply (Harrison *et al.*, 1999) as it improves visibility of requirements and reduces the amount of stock (Hewwit, 1999). The adoption of the lean principles is appropriate for commodity products with predictable demand, whilst agile principles are relevant for innovative products unpredictable demand (Childerhouse and Towill, 2000). A combination of the two is known as "leagile" (Van Hoek, 2000; Bruce *et al.*, 2004).

So, within a fast fashion environment, traditional approaches to sourcing, buying and the momentum of the fashion cycle are challenged. A portfolio of supplier relationships offering a balance between time to deliver and cost is emerging. A blend of close to market suppliers for the introduction of new products mid-season and long distance suppliers for cheap core and commodity items is important. In other words, sourcing strategies are placed within the framework of a leagile approach.

P1. Leagile approach is appropriate for supply chain management for fast fashion.

Managing a portfolio of supplier relationships

Relationship building is argued to be a key aspect of a buyer's role (Wingate and Friedlander, 1978; cited in Fiorito, 1990). A company will have a variety of relationships ranging from close partnerships with key suppliers to develop products, through to distant relationships for a one-off purchase and an emphasis on getting the lowest price (Table I). Kilduff (2005) suggests that an adversarial and arm's length approach is typical of fashion retailers. Often long-term relationships will involve social and interpersonal relationships, as well as formal and contractual relationships between organisations (Bruce and Morris, 1998; Palmer, 2000; Tucker and Jones, 2002). Within fast fashion, the question arises, are long-established suppliers able to provide a time-compressed service in a tight budget? Some suppliers are investing in design capabilities to reduce time to market to achieve these constraints. Buyers have to switch supply to bring on-stream local suppliers to introduce innovation rapidly into the market which may involve buying weekly. Flexibility is critical in fast fashion to ensure rapid replenishment.

In a partnership the emphasis is not always on price, but on trust and the long-standing relationship between the two companies. The comments of senior buyers in departmental stores illustrate this well, as follows:

> If it was only cost we would go out of business tomorrow because as far as the customer is concerned they go a retailer because they can trust it. "I might not always find what I want but at least the quality is going to be good irrespective of where that product is manufactured", and with the same ethical quality that you would expect in the UK (Menswear Buyer, Major Department Store).

> We tend to work direct with factories as much as we can, we don't, we try not to work through agents. That's really so that we can have, not necessarily the best prices but we can have as much one on one contact, therefore we've got quite a tight supply base but it's a supply base that we've known for a long time, they understand what the company is all about, they've been with us for the last five years, right from the beginning, and that's very important, the relationship that we have with them (Buying manager, Major Department Store).

Relationship	Characteristics
Strategic alliance (Dossenbach, 1999; McCutcheon and Stuart, 2000; Hines, 2001) Cooperative (Ford, 1980; Ford, 1997) Partnership (Croom *et al.* 2000; Ford *et al.*, 1998; Buttle, 1996a, b) Collaborative (Loughlin, 1999; Williams *et al.*, 2002)	Integrate core competencies and add value to the relationship Equality Information is shared A more efficient supply chain
Operational partnership (Hines, 2001)	A partnership based on one partner benefiting from the other's core competence Partners may not benefit equally More risk for one of the partners Information sharing is selective
Opportunistic partnership (Hines, 2001; Williams *et al.*, 2002; Bruce and Morris, 1998)	One party performs activities that the other no longer will Power inequality One party gains at the expense of the other Risk for one partner Information rarely shared
Arms length (Gadde and Snehota, 2000) Adversarial (Stuart, 1997; Towill *et al.*, 2000; Ford, 1980) Conflictual (Ford, 1997)	Short-term Competitive Price-focused Low quality

Source: Daly (2004)

Table I.
Types of relationships

P2. A blend of long-standing and short-term relationships is appropriate for fast fashion.

Internal interfaces

However, internal relationships between members of the buying team are as important as external relationships, as the team makes both buying and assortment decisions. Fashion buying is a key role and it has been suggested that the various retailer functional activities are used to facilitate and assist the buyer in purchasing merchandise that satisfies consumer demand (Rachman, 1979; cited in Fiorito, 1990). Typically, the buyer will liaise closely with merchandising and design. The following quote from a merchandiser in a high-street fashion retailer illustrates this point well:

> So, it's really the merchandisers who once the stocks in place, and you've got delivery dates on it, it's really the merchandisers role to make sure that they're (Buyers) still happy with those lines coming in. I mean often the buyer has to get involved because a lot of it's about styling and colour, but for example you know white's not working and we've got two more lines coming in and I'd be like "should we still be doing them and is there any opportunity to change it, you know anything like that" (Interview Merchandiser, 24.2.05).

The process is likely to involve considerable information, including market trends, and consumer behaviour (Johansson, 2002) and also longer-term trends in the supply market, e.g. concentration and switching costs. Often standardised and modified re-buys require internal and operational information, including sales and cost figures (Johansson, 2002). Thus, fashion buying has strategic implications for the retailer as wrong decisions can have disastrous consequences for retailer reputation and economic performance. The buyer works closely with design functions to ensure a fit between trend forecasting and the consumer profile. One of the acknowledged leaders in fast fashion is Zara, which has tight internal processes, of which design, buying, production and merchandising are core (*The Economist*, 2005, Strategic Direction, 2005, Foroohar and Stabe, 2005).

P3. Fast fashion requires effective integration of internal functions and processes.

These propositions are summarised in the model shown in Figure 1. It is proposed that buying for fast fashion encompasses a leagile approach to supply chain management; supplier relationships comprised of a mix of long-standing and short-term relationships; and, the effective integration of internal functions and processes. These elements enable the flexibility and speed of response to market demands demanded by fast fashion.

Aims and methods

The overall aim of the paper is to understand the role of sourcing and buying in a fast fashion context. As such, the objectives are to:

- identify the key parameters of the fast fashion environment;
- highlight their impact on sourcing and buying activities;
- explore the approach taken to sourcing and relationship building; and
- examine organisation of internal processes to support fast fashion.

Three companies were selected for case studies, one supermarket retailer, one department store and one specialist fashion chain. It was felt that this then would give a representation of the recent changes in the fashion retail sector, and facilitate an analysis of the approaches to sourcing across the different sub-sectors, enabling identification of similarities and disparities.

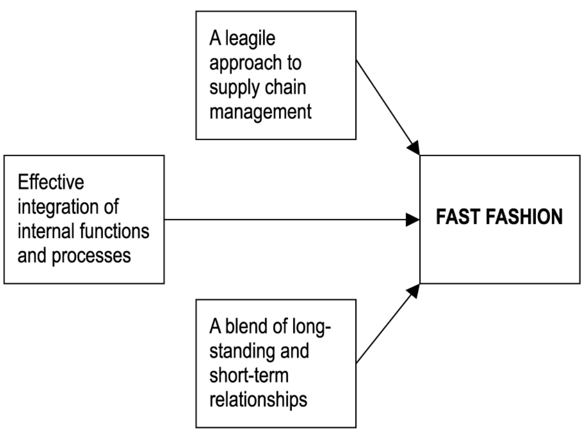

Figure 1.
Model of sourcing for fast fashion

A case study methodology was employed to gain insight into the approaches and processes adopted by companies. Semi-structured interviews were held with senior executives representing sourcing, buying and merchandising activities and also, where possible with overseas agents and first tier suppliers. An "aide-memoire" was used to underpin interviews and allow for collection of comparative information, probing and more in-depth discussions. Secondary sources were used, including company documentation, newspaper reports, trade journals, web sites and market reports. Interviewees were involved in the development of case studies in order to ensure validity and reliability of the research. Content analysis elicited the main themes concerning sourcing and buying in a fast fashion context.

Cases

Each of the cases presented illustrate sourcing and buying in a fast fashion context. The department store has own-brand and private label collections with fast fashion targeted at the young consumer. The supermarket has its own brand collection, which is aimed at a broad age and size category of women and family consumers and includes accessories and shoes to put together a complete outfit. The specialist chain centres around a classic style with in-seasonal changes to update the collection and to respond quickly to the changing market demands.

Case study A: Supermarket

Company background

Company A is a major high UK retailer, with over 375 stores nationwide, and a further 155 franchised stores overseas. The company has a turnover of £7.3 billion, and in 2003 saw a profit of £822.9 million. The company employs approximately 66,000 people in UK stores and head office. The company has its own brand fashion, which ranges from teenagers to young women to older women, seeking a more "classic style". Men's wear along these categories is offered too.

The buying function

Buying is a crucial activity and is well represented at Board level. The structure is flat, with the buyer/product developer reporting to the director for their department, who then reports to the executive director. This allows decisions to be made rapidly, which is essential in a fast-moving market such as clothing retail.

There are both operational and strategic elements to the buyer's role. Operational work includes liaising with current suppliers, but at the same time the team is thinking more strategically about how the company should optimise the combination of product, speed to market and cost.

The buying function is split into multi-functional departmental teams. This enables the buyer to work closely with the merchandiser and garment technologist for that product area. However, it does mean that the company does not aggregate orders for product types across the business, in order to leverage scale.

The buying process

The process is complex and comprises a number of activities, including analysing sales figures for the current season to identify strengths and weaknesses. The buyer conducts trend shopping in New York, Paris and Milan, and also comparison-shopping in the UK in order to identify competitor activity. Concurrently, the merchandiser develops the buying budget, deciding on the number of UPCs to be merchandised in stores, and on the total quantities of products required.

Finally, the team works with suppliers to define the production programmes, including pre-production, production planning, capability planning and delivery to stores.

Sourcing

Company A sources 45 per cent of its product from Europe, Eastern Europe, Turkey and Morocco, and the remaining 55 per cent from India, Sri Lanka and China. Decisions are based on whether the product is "core" or "fashion". Demand for a core product is much more stable and easily forecast, and therefore more suitable for manufacturing in a low labour-cost country with long lead times than a fashion product with unpredictable demand.

Suppliers are categorised into two types – full service vendor and direct factory, depending on the working relationship, and the nature of the work. The decision rests with the buying team, and is based on capability. Company A will always choose to manufacture in a full service vendor providing the garment can be produced at the right quality, price, design, and lead time. If this is not possible then the product will be produced in a direct factory.

The full service vendor plays an important role for the company's success, collaboratively designing the product, and managing the manufacturing process. Company A only pays a full service vendor for the goods as they are moved into store from the supplier's warehousing facility.

The relationship between a direct factory and Company A is much more arms length. Company A designs the product in-house and develops the pre-production package, which is then passed to the factory for sampling and production. Following manufacture Company A will arrange for a logistics operator to transport the goods to a Company A owned warehouse. Direct factories are paid FOB.

Internal processes

Within the buying function there is a mix of bottom-up and top-down information sharing. The buying team takes a bottom-up approach to sharing trend information. This information and information on sales is shared with the top 15 suppliers, which account for some 80 per cent of the total supply base.

The board share strategic information including future aims and strategies downwards with the buying team. This allows the buying team to take account of such considerations when developing collections.

Case study B: Department store

Company background

Company B is the leading department store for branded goods in the UK with a reputation for quality and with retail stores in all the major cities throughout the UK. The target market consists of top-end customers, falling in A, B and C1 sub-groups. A focus is placed on identifying exclusive niche brands.

For women's wear, the company buys in brands and also develops a number of brands in-house. Customers range from "fashion lover" to "traditional", with traditional customer's needs being met solely by concessions. Bought-in brands include Diesel and Miss Sixty, through to Jerry Weber and MaxMara. Own brands are designed for the younger consumer; another line for career customers; and a third category for classic customers.

The buying function

The company works closely with suppliers when developing ranges. Information for themes comes from Worth Global Style Network, catwalk shows and information held by the designers themselves. Teamwork plays a key role, and buyers and designers get together weekly to share ideas. Suppliers provide up-to-date market and trend information.

Manufacturers play a key role in designing ranges – either the buyer suggests an idea to the manufacturer who designs a product to meet requirements, or the buying team select from a collection that has been produced by the manufacturer.

A colour pallet is defined for each season, but if a new colour emerges mid-season the company is in a position to address this. This allows greater flexibility, as fast fashion moves quickly. By buying weekly the company is able to address any emerging trends and also to pull out of ranges that are not working quickly and easily. Within this brand, it is generally felt that if a product is not selling within two weeks it is unlikely to be a successful product, and thus will be marked down accordingly.

A seasonal plan exists but will change according to market behaviour. If a product is selling well the team will trade above the original plan. The buyer is given a weekly buying budget to address the fast moving nature of the market. This can be complex to manage, as product is bought from suppliers in Turkey, the Far East and the UK.

Internal processes

Designing a range begins approximately one year before the product is due in store, and initially involves looking at budgets and different options including colour, which is done using a colour consultant. Fabric boards are built with information from Premier Vision.

After, sketches will be developed and sent to manufacturers (mostly based in Hong Kong) giving details of the key stages for the season. Manufacturers have their own design team and communicate with the UK designers using information technology.

The next stage in the design process begins with a trip to Hong Kong, to view manufacturer samples. Once in Hong Kong, issues such as collection themes, moods for the season and final decisions on colour will be discussed. Delivery phasing is also discussed, deciding at what point in the season it is appropriate to introduce different themes.

Once the team is back in the UK the collection is organised into a series of monthly packs, decided by the team through a process of meetings, and signed off by the buying director. The team also budgets for trends that arise during the season. Feedback from retail outlets is crucial and this information is shared on a weekly basis throughout the company.

Sourcing

The company prefers to liaise directly with manufacturers, rather than using agents, as the one-on-one contact that this provides is important. The company has used the same supply base since the range was introduced five years ago, and has developed strong relationships. Often buyers and designers bring suppliers with them from other organisations; otherwise they are sourced by word-of-mouth.

To meet the demands of fast fashion consumers, the company is building relationships with "up-and-coming" artists from areas including Spitalfields Market and Portobello Market to invest in a local supply base. This allows the company to introduce weekly changes to its collection.

From the perspective of one Hong Kong-based manufacturer, people are an important relationship factor. Communication can often be difficult, which is why they choose to deal directly with their clients. Relationships between organisations enable the two companies are able to define the critical path and order confirmations together. Trust is important as suppliers intuitively know the company's product and quality requirements.

Case company C: Specialist fashion chain

Company C is a global designer lifestyle brand and in 1970 opened its first retail outlet. Today, the company has over 220 shops worldwide, with merchandise sold in over 42 countries, and an annual turnover in excess of £180 million.

The buying function

Company C is privately owned by designers, and the approach to fast fashion is design driven. The owners are "hands on" and involved day-to-day with key collection and sourcing decisions. Buying is incorporated in the multi-functional team that is responsible for sourcing fabrics, dyes, embellishments and accessories. The technical activity liaises with fabric mills and other suppliers to ensure that the products are produced to the appropriate quality and on time.

Internal processes

The company's core competencies come from design and company culture, which is "friendly, trusting and relaxed", enabling effective communication and job satisfaction. The designer has excellent technical knowledge, which is used to create evolutionary products.

The team is small and cross-functional and integrates design, technical design development, production and sales. This enables effective communication between functions throughout the process of putting the collection together.

A major role of the technical assistant is to liaise with factories, and check that the right product components are sent out to the right factories at the right times, and to communicate between the factory and the designer until fabrics are correct.

Sourcing

The majority of fabrics are sourced from Italian mills. The company has good relationships with ten manufacturers, to facilitate negotiation on volumes and lead times; some have been working with the company for 15 years. Company C is active in building relationships, visiting the mills personally to build a rapport, and ensuring that technical staff have good language skills. They also have a portfolio of another 20-30 companies that they use on a less frequent basis, and "flavour of the month" mills, which tend to have short-term relationships often only lasting for up to two seasons. The company does not work through agents.

The company has established strong relationships with both the factory floor and CAD programmers at knitwear manufacturers. Although factories are technologically advanced they are often hesitant to try new styles, and it is the technical assistant's job to encourage and teach them, requiring diplomacy so as not to break down relationships.

Discussion and managerial implications

It is clear that fast fashion has become a way of life for fashion companies in the UK and they have adapted their supply base and internal processes to manage the speed and flexibility required to meet the resulting demands. The impact of fast fashion is in the increasing number of "seasons" and the management of a portfolio of suppliers to balance time of delivery and cost for core and basic lines and fast fashion items. Fast fashion does not apply to the whole range in store, indeed, 80 per cent of fashion may be core and basic lines with fast fashion accounting for about 20 per cent. The cases give a snapshot from each main category of fashion retailer, including supermarket, department store and retailer formats. The approaches the companies take to managing suppliers, the relationships with these and the internal processes for fast fashion are compared in Table II.

Common to each case was an integrated internal process whereby sourcing, buying, merchandising and design interfaced effectively to enable rapid decisions about the collection to be made. Technology was used in internal processes and the supply chain to convey the design of the collection, to enable changes to be made quickly and to speed up the design agreement and signing off process. In some cases, sourcing and management of suppliers was an integrated aspect of buying, as in the supermarket case. For the specialist fashion company, the technical team liaised closely with the suppliers, together with the buyers, to ensure that the design was interpreted correctly and to speed up the production time. For all three cases, merchandising was a separate activity, but was involved closely in the whole process of ensuring that product was presented in store quickly. The supermarket tended to react to trends set by the catwalk shows and had a readiness to bring fashion reflecting trends quickly into

	Company A	Company B	Company C
Relationship types	Long-term Partnership Short-term Arm's length	Long-term Partnership Close Short-term Adversarial Trust	Long-term Partnership Rosta of short-term Social element Trust
Integration of internal processes	Design, buying, sourcing, merchandising Board level	Design, buying, merchandising	Design, production, technical, merchandising Board level
Approach to sourcing	Leagile	Leagile	Lean

Table II.
Case comparisons

store. The specialist chain was involved in setting trends and was able to bring in-seasonal changes, using shorter print runs from European suppliers to update stock. The department store had an in-house design team to produce its own innovative garments, and outsourced its youth brand to a separate company to design, manufacture and be store ready. This youth brand was produced in short print runs from Eastern Europe and introduced in-seasonal changes on a weekly basis. Weekly purchases were made to update stock.

A portfolio of relationships were managed by the buying team. These included a mixture of European or local suppliers to overseas suppliers to maximise cost efficiencies and to trade off with time to store. In other words, all were operating in a context of leagile and had a complex array of relationships to manage to implement this approach. Relationships contained social elements, as well as operating at arms-length. The specialist fashion company employed buyers with language skills and an insight into Italian business practices, in order to develop an empathic relationship. The approach was to engage the suppliers as part of the "family" with the underlying belief that this would ensure priority treatment to facilitate on-time delivery. The supermarket operated a vendor selection programme encompassing ethical sourcing. Relationships were arm's-length and if the supplier failed to meet with expectations, then they would be changed. This approach was intended to prevent a complacent attitude and to put pressure on the suppliers to deliver. The department store managed relationships directly with the suppliers in the Far East and relationships were akin to a partnership. Trust was built up over time and quality assurance was delegated to the supply base. Rapid replenishment of fast fashion stock was from Europe and buyers dealt directly with suppliers buying weekly to keep abreast of market trends.

Conclusions

The dynamic environment of fast fashion has been a challenge to retailers. They have had to adapt internal processes to manage the fast fashion cycle and review the supply base to meet the cost and time demands for fast fashion. The strategic role of the fashion buyer has not been explored in current academic literature, but with the dynamic market context in which fashion retailers are placed, this role needs to be examined. This presents opportunities for significant future academic research into the nature and processes of fast fashion sourcing across the various retail segments, and ways in which retailers manage core and fast fashion product portfolios.

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Further reading

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Evolution of fashion marketing and communication: Systematic literature review

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EVOLUTION OF FASHION MARKETING AND COMMUNICATION: SYSTEMATIC LITERATURE REVIEW

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ABSTRACT

Purpose - *The research objectiveis to analyze the development and evolution of digital tools in luxury fashion companies.*

Design/methodology/aroach - *A search for specific criteria and boolean algorithms is carried out in Web of Science and Scopus on "Marketing digital" [AND] "Fashion", once the results are obtained, a selection of the most cited is made, and critical and analytical reading is carried out.*

Findings - *The relationship between digital marketing and fashion companies is reviewed from a perspective of economic growth and, more specifically, from the industrial sector's communication and marketing described above. However, the review clarifies that using social networks as virtual channels in managing reputation and engagement is not sufficiently addressed. In this sense, in a pandemic environment such as the one currently experienced, luxury fashion companies have assumed and understood the role of digital channels in building image, reputation, and desire to purchase by consumers in an environment that allows them to generate know the trends of stakeholders.*

Originality/value - *Reviewing the evolution of digital tools in luxury fashionto build trendsbecomes essential with the increased use of social networks. There is little research with a targeted aroach to the evolution of digital marketing in luxury fashion. For this reason, the study attempts to compile the theoretical and reflective discussion in this regard, contributing to the understanding of consumer behavior in the digital environment today.*

Paper type*: Literature Review*

Keywords: Fashion Marketing, Social Networks, Luxury Brands, Consumer Behavior, Revision Systematic, Communication, Marketing, Fashion.

INTRODUCTION

Marketing represents the fundamental axis of companies' economic growth and all recognizable spheres in society's life. It allows the creation of value for customers and the development of solid relationships with them, obtaining in return the value of the aforementioned (Kotler & Armstrong, 2003).

Marketing, like almost all communication and persuasion strategies, has evolved. Its development and growth have been projected in various areas. As has haened with institutions, technology, and the environment, it has also transformed, specializing, and progressing with the purpose, not only of keeping up with market dynamics but also of keeping ahead of it in step and gaining the most significant possible advantage (Mendivelso-Carrillo & Lobos-Robles, 2019). This study's main objective is to know and understand the logic and functioning of the new interaction processes between the actors and factors involved in marketing to unveil how consumers value brands and respond to various experiences. Therefore, a literature review by the most important databases (Scopus & JCR) will allow us to know the fashion world's latest marketing alications.

Digitalization and marketing have played a strategic role in the fashion industry (Pérez-Curiel & Luque-Ortiz, 2018). This industry's worldwide circulationoccurs and increases thanks to the emergence of the latest informational and global economy. Consequently, fashion results from a series of interconnected practices: market and economic, technological developments, and a series of more artistictechniques, such as marketing and design (Martínez-Barreiro, 2006).

In this sense, the fashion industry has developed its form of communication, which is crucial to understanding its marketing (Frutos-Torres, 2019). Marketing alied to fashion demands society's interpretation within its social, cultural, or psychological context and its translation into clothing products, accessories, and services (Del Olmo et al., 2018; cited by Frutos-Torres, 2019). How consumers value brands and respond to various experiences has been a central theme in the marketing literature for decades. In this regard, the literature systematization conducted by (Gürhan-Canli et al., 2018), which collected a total of 129 articles published between 1992 and 2016 in 8 globally recognized journals, identified two fundamental research perspectives on fashion marketing: global-local branding and the influence of culture on consumer-consumer interactions. Global-local brand research was found to be influenced by cross-cultural research. The review results revealed that the literature was mainly condensed into information processing, self and identity, consumer culture theory, and psycholinguistics to investigate the relationship between culture, brands, and consumers.

The work carried out by these authors differs from previous work in that it focuses mainly on the behavior of consumer-brand relationships in the global environment, focusing on behavioral-cultural factors such as attitudes, perceptions, and beliefs. It should be noted that the objective of the work carried out by the authors mentioned above (op. cit.) was to facilitate a future research agenda of greater significance.

As a result, a bibliometric analysis was carried out, using the "WoS" and "Scopus" databases, using the research terms: "Digital Marketing" and "Fashion", a total of 177 articles published in "Scopus" and 256 in "WoS" were counted.

The results suggest that, among the various aroaches and areas they refer to, those concerning its logic as a driver of business innovation, the development of new products and services, and brand consumers' experience in the processes of creation and shared design stand out in particular. However, the study also revealed some gaps in the references that evidence the imperative need for further research on the subject (Alves et al., 2016).

Selection of the Corpus

To achieve this research's objectives, exploratory and descriptive analysis is carried out based on the current literature review (2016-2021) on digital marketing in luxury fashion. The main aim is to analyze the development and evolution of digital tools inluxury fashion companies.

The study's development was structured in two phases:

i) Collecting specialized literature on digital marketing and fashion, and
ii) The analysis of the information extracted. During the first phase, to understand the evolution of online marketing in the fashion sector, an exploration of the most relevant databases, in this case, WoS and Scopus, was carried out.

In Scopus, the search criterion was "digital marketing" with the boolean algorithm "and" intersection with "fashion". For the search refinement, we opted to select emerging documents 2016-2021 from the area of social sciences and Business, Management and Accounting; document type articles; and source type journals. Before the first screening, 177 documents emerged, which after refining became 52. It is detected that during the years 2019 and 2020, there has been an increase in scientific contributions concerning this topic. The journals with the highest number of publications are Journal Of Global Fashion Marketing and Journal Of Fashion Marketing And Management.

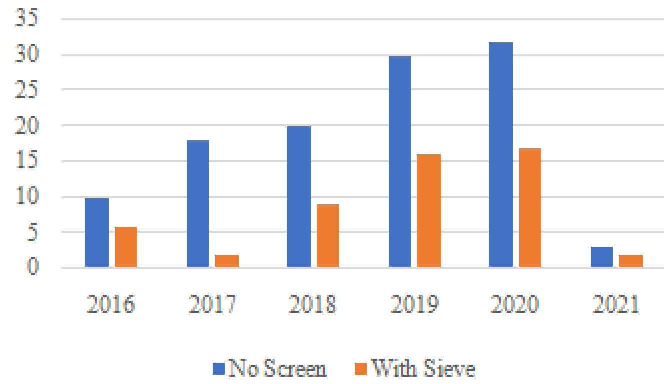

FIGURE 1
SCOPUS RESULTS

In WoS, the same search criteria were used, and 437 documents aeared in the first filtering. For the refined search, the period 2016-2021 was selected, only in the social sciences, document type article, obtaining 112 documents from this screening. In this case, it detects an increase in literature from 2018, and the journals leading the most significant number of articles coincide with those of the Scopus database. To avoid duplicities, each of the duplicate items per each database was eliminated, understanding that there are journals that overlap in both. A literature review (maing) and grounded theory review were carried out with which the same epistemological, ontological, and theoretical forms would correlate.

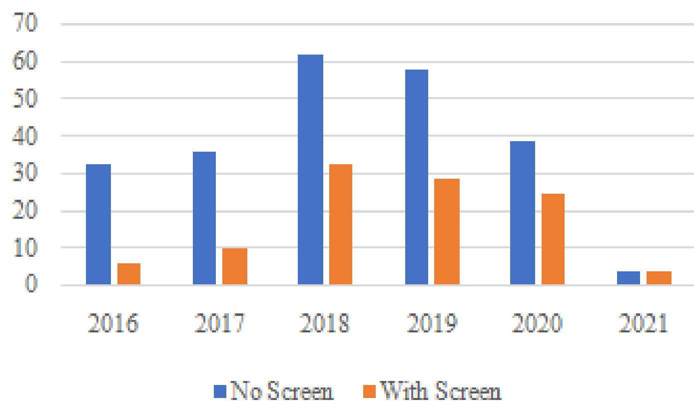

FIGURE 2
WOS RESULT

Criteria for Document Selection (Screening)

The documents' selection was made according to the thematic relationship and thepaper's topicality, emphasizing the most recent (2016-2021). Thus, 177 articles were analyzed in Scopus and 437 in WoS, refining only those related to the study object. After this screening, 52 were selected in Scopus and 112 in WoS, as mentioned above (Figure 1 & 2). Finally, the relevance and immediacy factor is taken into account**,** of all the emerging documents, only those most cited (immediacy factor 2016-2019) were taken into account, understanding that these are the ones that have the most significant weight in the international academic community, finally analyzing a total of 30 documents.

RESULTS

Digital Marketing and Luxury Fashion

Luxury represents the aspiration of a good part of consumers (Frutos-Torres, 2019), so luxury brands reinvent themselves in their marketing and business strategies to adapt and face emerging markets eager to consume luxury fashion. They position digital marketing as an essential tool for leading brands in the market with younger audiences (González-Romo & Plaza-Romero, 2017). Under this perspective, (González-Romo & Plaza-Romero, 2017) conducted research focused on identifying which are the current strategies in digital marketing alied by brands in the luxury fashion sector and on knowing the most significant aspects in the communication of brands with their target audiences (stakeholders) in the virtual scenario. To achieve their objectives, they resorted to qualitative techniques, such as content analysis and in-depth interviews. The results of the study mentioned above showed that, among others, storytelling is one of the critical strategies in digital marketing. This format is found in video strategies, social media, events, and exhibitions open to the public, searching for interaction with the public and showing its story. However, it is worth highlighting that:

This co-creative turn in luxury fashion marketing has also raised some concerns regarding brand integrity and control (Jin, 2012) as social networks shift power away from marketers, who no longer "unilaterally define and control" the brand experience (Vallaster & von Wallach, 2013). In this sense, luxury marketing still lacks proactive management of consumer-generated media (Shao et al., 2015; Berthon et al., 2009; Koivist & Mattila, 2020).

To contributeto expanding knowledge and clarifying doubts about emerging issues in this knowledge area, (Koivist & Mattila, 2020) developed a conceptual analysis examining User-Generated Content (UGC) within experiential marketing events and demonstrating how a brand exhibition can facilitate the co-creation of visual content and its dissemination on social networks. The research comprises an illustrative analysis of the visual UGC framework developed by studying Instagram ads depicting consumer experiences during an experiential event for French luxury brand Louis Vuitton.

The implications of the research reach both the theory and practice of luxury fashion marketing in social media. The study presents a new perspective on the dynamics of company-consumer co-creation. It exhibits the alication of a novel methodology for the "visual" analysis of luxury, facilitating the understanding of consumer image meanings (perceptions). In terms of practice and management, it sheds new insights on UGC in social media marketing, especially related to product interaction.

An investigation that offers advances in the theory and practice of brand advertising effectiveness, particularly luxury, by decoding consumer engagement with the brand through narrative pathways, is that developed by (Kim et al., 2015), which was created using a qualitative semi-structured online questionnaire for the alication of a modified Thematic Perception Test (TPT) projective technique.

Although participants expressed cultural differences in how they write about their experiences, the results showed an implicit form of engagement that is equally effective across the cultures analyzed. This research represents an essential contribution to the advertising of luxury fashion brands. It explores how implicit meaning is conveyed through narrative, and it shows engagement with luxury advertising images in different cultural contexts.

In the same line, and intending to deepen the communication and marketing models of luxury fashion brands to achieve visibility and profit in sales portals, (Pérez-Curiel & Sanz-Marcos, 2019) conducted a study focused on the Gucci brand, which showed that the alication of the online strategic plan, the renewal of the corporate image (restyling) and the consumption criteria of younger audiences, constitute the differential values of success and current popularity of the fashion brand.

(Choi et al., 2018) note that how divergences in advertising strategies can enhance the effectiveness of luxury advertising in the context of social networks has rarely been investigated, and to fill this gap, (Choi, et al., 2018) present work on how persuasion can be predicted and enhanced through the use of attribute-based or benefit-based messages according to the underlying mechanisms of psychological distance, social attitude functions, and cultural context.

The personal luxury and experience goods markets have been the predominant drivers of the slowbut steadygrowth rate of the overall luxury market, whose projected value estimate for 2021 is €1015 billion, with 465 million consumers (Achille, 2014; cited by Ajitha & Sivakumar, 2017).

In the context of consumer behavior, values are a fundamental construct for understanding and reaching consumers (Ajitha & Sivakumar, 2017). With this frame of reference, and to investigate the role of values, attitudes, and behavioral patterns of women consumers of luxury cosmetic products, (Ajitha & Sivakumar, 2017) conducted research in which data were collected from 372 women users of the Chanel, Lancome, Dior, Elizabeth Arden, Giorgio Armani, and MAC brands, who completed a survey in a self-administered manner. Hedonism and status value was found to have a highly significant relationship with attitude, while wearing behavior is influenced by materialism and status value. Therefore, consumers' symbolic and psychological traits will reflect their purchase intention and preferences for luxury cosmetic brands. This study's findings provide valuable information for understanding consumer trends, attitudes, and behaviors in the luxury cosmetics market, shedding light on this topic and suorting the development of successful marketing strategies.

Moreover, considering the scarce evidence available on how social media marketing activities influence brand equity building and consumer behavior towards a brand, (Godey et al., 2016) explored these relationships by studying pioneering brands in the luxury sector (Burberry, Dior, Gucci, Hermès & Louis Vuitton). Based on a survey of 845 consumers of Chinese, French, Indian, and Italian nationality, followers of these luxury brands, they developed a structural equation model that helps address gaps in previous literature on brands in social media. One contribution this study offers is confirmation that components of luxury brands' social media marketing efforts positively affect brand equity and on the two main dimensions of brand equity: brand awareness and brand image.

Social media marketing as a form of two-way communication has gained popularity. It makes it easier for companies to communicate with their customers and potential customers and respond to them more easily (Brandão et al., 2018).

In this regard, (Chung et al., 2018) conducted a study in which they found that online service agents provide pleasant and quality communication that positively affects customers' perceptions of marketing efforts.

"Luxury customers expect exclusive experiences" (Chung et al., 2018; p. 592).

Luxury brands have also been immersed in the digitalization trend, making social media use in their relationship with consumers more and more. It is recognized that brand users' participation increases brand loyalty intentions.

In this same research area, (Roozen & Raedts, 2020) empirically investigated whether the promotion of environmental and social externalities (negative audiovisual and printed information), derived from the production process of the "fast fashion" industry influences the attitudes of potential consumers towards this sector in terms of liking, recommendation, loyalty, satisfaction, and purchase intention. In their research, the authors also wanted to determine the differences between consumers and how the attitude towards "slow fashion", fashion involvement, and consumers' ethical and environmental awareness significantly influences such information on consumers' attitudes.

Unlike most experimental studies, the design of this research, consisting of three lessons based on good outdoor advertising material, tested the impact of natural (not fictitious) advertising. Working with existing brand names made it possible to measure brand attitudes in a more externally authentic environment. The results confirmed how damaging negative publicity can be to the image of fast fashion and how complex it is to "recover" through positive publicity. Likewise, it was shown that negative publicity has a severe impact on consumer attitudes towards fast fashion brands, without significant distinctions between social and environmental issues. This confirms the importance of the fast fashion industry taking both seriously.

Luxury Fashion Digital Marketing and Social Networks

Advances in Information and Communication Technologies (ICT) have posed a challenge for all sectors, forcing marketers to rethink the most aropriate ways to access an increasingly younger audience, accustomed to using digital devices and interacting with brands (González-Romo & Plaza-Romero, 2017). Social networks have crystallized as the backbone of promotion and a robust loyalty tool for lifestyle fashion brands (Del Olmo et al., 2018; cited by Frutos-Torres, 2019).

Digital environments currently articulate new possibilities for a dialogue in which advertising has a challenge. That is the amplification of its messages to settings, even external, to the so-called target (López-Paredes, 2018). Social networks help brands' marketing, including customer service, vicarious experience, creative advertising options, and new business oortunities (Kim & Kim, 2020).

Despite the current interest in determining and understanding the relationships between social media and consumer behavior, few academic works focus on the luxury fashion industry and the specific topic of marketing strategy perspectives within this domain, so some issues require further research (Ananda et al., 2017).

There is a need to identify the critical success factors of social media strategy and how it affects organizational performance. To shed light on these issues, (Wu et al., 2020) developed a study that provides a comprehensive research framework for social media, environment, marketing strategy, and performance. The research was conducted using data from 207

Taiwanese fashion brands obtained through a mail survey. Structural equation modeling and qualitative comparative fuzzy set analysis were used to test the research hypotheses' empirical relationships. The results confirmed that social networking strategy is positively affected by an organization's business, market, and innovation orientation. These findings may prompt organizations to foster their entrepreneurial, demand, and innovation readiness. In conclusion, the results suggest that fashion brands should be engaged in identifying oortunities, taking risks, producing proactive innovations, alying creativity, and developing new versions of their products (Wu et al., 2020).

A social media marketing strategy creates two-way communication (P2P) between organizations and current or potential consumers to improve CRM (Customer Relationship Management). Consequently, the social media strategy provides brand visibility and suorts market research. Companies can conduct market research, communicate with their customers and collect customer feedback (Wu et al., 2020).

Social networks are particularly significant in marketing and advertising because they offer interactive network channels for consumer branding. In brand management research, it is plausible to implement a social networking aroach based on LinkedIn, Twitter, Facebook, YouTube, and other similar social networks to develop marketing strategies (Wu et al., 2020).

For example, (Navarro-Beltrá et al., 2017) conducted a study to examine fashion brands' communication through Twitter. Based on the content analysis of 1,135 tweets published in 2016 by H&M, Zara, Ralph Lauren, and Hugo Boss, they found that although there is no total alignment among the brands studied, it is possible to state that, in general, Twitter possessed a broad dialogic potential that fashion brands are not fully exploiting due to the conception that their main activity is the communication of images, news, and novelties. Likewise, the analyzed brands seem to pay little attention to maintaining the "dialogic loop", at least in Twitter, since, as the authors mentioned above acknowledge, the research was limited to this platform. These results offer an invitation to a research line focused on examining fashion brands' communication on other digital media, such as Instagram or Facebook.

Research on Luxury Fashion Marketing on Facebook

The most valuable social networks for capturing leads for Business to Customer (B2C) type businesses are Facebook and Twittersince they share content in a non-intrusive way with advertising campaigns that provide information and content of interest to the user (López et al., 2019).

There are 2.13 billion monthly active users on Facebook (Facebook, 2018a), along with 60 million dynamic business pages (Facebook, 2018b). It is safe to say that social media has gone viral. More than 2.5 million businesses pay to use Facebook advertising, and 75% of brands pay to promote posts on it (Smith, 2016; Kawafa & Istanbulluoglub, 2019).

(Azar et al., 2016) point out that, although social media have focused on a progressive number of studies, there remains a need for empirical research on consumer-brand interactions on Facebook®, especially concerning consumer motivations, to attract brands to social networks. To that end, they conducted research that could provide additional information to brand managers on how to adapt their aroaches and strategies to increase consumer interactions with brands on Facebook. The study, which involved a convenience sample of 160 users, was based on alyingKatz's gratification theory. The intention was to develop a new consumer typology based on consumers' motivations for interacting with brands on this network (social influence, information seeking, entertainment, trust, and reward), determining the type and intensity of such interactions. The new categorization created and exhibited encompasses four different groups of consumers defined as the "brand independent", the "brand profiteers", the "brand buddies," and the "brand dependent". This novel classification provides brand managers with information that favors the development of more effective strategies according to consumer groups according to interest.

Meanwhile, (de Silva, 2019) facilitated a framework for relationship-building through customer engagement on Facebook Brand Pages (FBP) andresearched with a sample of 327 university users in Sri Lanka. He developed a conceptual model that he tested using Structural Equation Modeling (SEM) in AMOS *vs.* 21 statistical software. Among the results yielded by the data analysis, it was found that customer motivations positively influence customer engagement with FBOs in terms of information, remuneration, social interaction, and personal identity on aarel/fashion FBPs, but not so concerning entertainment. Additionally, it was observed that customer engagement aears positively related to trust and commitment to the BPF.

The Spanish brands Zara and Mango, of recognized prestige in practically all continents, were the study by (Cristófol et al., 2019) to check whether promotional or corporate actions on the Facebook platform contribute better results in terms of audience reach. A content and quantitative analysis methodology were used to evaluate, on the one hand, the main characteristics of the posts that obtained the most significant impact in the period considered and, on the other hand, the ability of these brands to generate conversation and community with their fans. The main results indicated that even though Mango's activity is comparatively half that of Zara, virtualization and engagement are eight times higher in the case of Mango, which leads to the conclusion that a more significant number of publications does not imply more outstanding relational quality in the community of users around the brand.

Today, buyers read reviews and experiences of other buyers posted in virtual communities before purchasing a product or service (Lu et al., 2010; cited by Klavaech, 2018). Since reviews are in the public domain, this can become a primary concern for managers in negative thoughts and a significant oortunity in positive ones (Purnawirawan et al., 2015; cited by Kawafa & Istanbulluoglub, 2019).

However, it is essential to note that research on customer reviews and likes on Facebook® remains unclear about the relevance of their role across sectors. For example, customer reviews aear to be of great significance for technology products, but generalizing this to aarel and fashion is complex. Indeed, in the fashion industry, the unknown remains about how consumers construct their experience of exposure and interactions related to social media (Kawafa & Istanbulluoglub, 2019).

As an oortunity to open a window in generating knowledge that contributes to the theoretical understanding of consumer perception and online shoing experience in the social media environment, (Kawafa & Istanbulluoglub, 2019), grounded in Personal Construct Theory, set out to explore the role of customer opinions on social media pages, particularly on Facebook. They also studied how customers perceive brands' social media marketing activities in the context of the online fashion industry. The study contemplated purposive sampling for customers' participation with recurring online fashion shoing experiences, including shoing experiences and post-purchase experiences. Data were gathered from 25 repertory grid interviews, the analysis of which reveals information that challenges the current understanding of the role and relevance of customer reviews and Facebook® pages in online fashion shoing, thus emerging a paradox of online fashion shoing.

Additionally, structural equation modeling analyses revealed that perceived source credibility (both celebrity endorsing their brand and Facebook profile owner) mediates the relationship between the experimental conditions (celebrity as aspiring outgroup member *vs.* same school student as ingroup member *vs.* different school student as outgroup member) as well as outcome variables (interpersonal attraction to the celebrity, ad involvement, and ad credibility) in viral marketing on social media platforms (Jin & Ryu, 2018). These findings highlight the value of perceived credibility in celebrity endorsement in social commerce and consumer suort for viral marketing brands.

The literature on the experience and behavior of intermediate consumers about fashion adoption and consumption is limited, especially regarding the characteristics of their Fashion Change Agents (FCAs), so Baker, et al., (2019) researched in that regard. This study identifies intermediate fashion consumers' profiles with Fashion Change Agent (FCA) characteristics andfashion innovativeness and opinion leadership. It looks at how tween FCA characteristics influence their internet innovativeness, interest in online co-design participation, and brand engagement. With a sample of girls and adolescents obtained by snowball sampling, the data obtained were analyzed using MANOVA and multiple regression, areciating the positive effects of preteens' FCA character around Internet innovativeness and interest in online participation co-design and brand engagement. The results obtained suggest to marketers and retailers more innovative marketing practices in fashion, mediated by the Internet, interactive and brand-oriented.

Research on Luxury Fashion Marketing on Instagram 3.2.2.1.

To date, research on the interaction of fashion brands with users on social networks has mainly focused on other social interaction platforms other than Instagram, so (Bonilla et al., 2019) conduct an exploratory, non-experimental type of study using a content analysis procedure. An initial classification was made and subsequently a statistical treatment of the content of all the posts published by H&M on Instagram throughout 2017. Three categorization systems were used for the analysis to determine engagement from the point of view of message content, the company's communication strategy, formal aspects, and the category of products presented in the post. The results helped to clarify those aspects of H&M's Instagram posts that generate a more significant number of interactions with users and those aspects that positively or negatively affect responses through comments and likes, having identified which attributes of the posts generate greater or lesser business from each of the three theoretical models of post-selection. Similarly, those variables that generate asymmetric responses in comments and likes were determined. Because of the variable degree of engagement they imply, they pave the way to assess whether these differential impacts can be exploited to reformulate brands' digital communication strategies.

On the other hand, in the case of luxury fashion brands, they leverage the power of Instagram and fashionistas for strategic brand management. With this in mind, (Jin & Ryu, 2019) studied the interaction effects between the source type of the aforementioned social network and luxury brands (brand *vs.* fashionista), visual image type (product-centric *vs.* consumer-centric), and consumer characteristics (vanity, opinion leadership, and fashion awareness), on brand recognition and trust. Using an experimental design, a sample of 377 participants recruited from Amazon Mechanical Turk (MTurk), and logistic regression analysis, two-way interaction effects between sources and visual images were found on brand recognition. Brand recognition was higher for product-focused images when the original was the fashionista as the prescriber. In contrast, brand recognition was equivalent regardless of image type when the source was the brand. Logistic regression and multiple regression analyses revealed moderating effects of references and visual images on the association between consumer traits and brand outcomes. With this, guidelines are obtained in marketing management in terms of brand placement and product positioning in the Instagram/Fashionista of luxury brands as prescribers.

On the other hand, (Casaló et al., 2019) investigated influencers on Instagram to understand that opinion leaders are important advice sources for different consumers. Instagram is the most used platform by them in the fashion industry. The study was developed to identify some key antecedents and consequences of thought leadership in this context. Based on data collected from 808 followers of a fashion-focused Instagram account, the results suggest that originality and uniqueness are crucial factors for a user to be perceived as a thought leader on Instagram. On the other hand, opinion leadership was found to increase consumer intention to follow fashion tips posted on the account, which may affect companies' sales because consumers may trust the leader's opinion given their experience with the product and perceived knowledge about it. Moreover, the influence is even more significant when the consumer perceives that their content matches their personality and interests.

Similarly, (Martínez-Sanz & González-Fernández, 2018) deepened the analysis of the fashion influencer's figure by studying the communicative resources used by the leading Spanish fashion influencers on Instagram, paying particular attention to their handling of image and text. Likewise, considering the progressive incorporation of men in this sector, they set out to determine whether the attitudes and ways of generating present engagement variations concerning the gender of the author and the type of values he/she projects. A content analysis was performed based on the communicative activity of the 13 most prominent profiles in 2017. The results evidenced a very even use of claiming techniques, mainly promotional, dubious compliance with Spanish regulations on advertising -which obliges authors to explicitly indicate any message that promotes a product or service from a contractual relationship-; and the use of images to build idyllic lives from everyday scenes.

In this regard, user reactions, responses, and behaviors on social media platforms are fertile research grounds (Ananda et al., 2019).

In the interest of expanding knowledge in this area, (Kim & Phua, 2020) conducted research to evaluate consumer responses to empowerment hashtags in social media-based fashion advertising. The results showed that branded hashtags couldgenerate favorable consumer ratings of advertising campaigns, confirming that empowerment hashtags significantly increase their identification with the advertised brands.

It is a fact that the fashion industry has embraced social media as one of the essential marketing avenues to reach its customers online and also as an avenue to rekindle the brand passion and foster customer loyalty (Wright, 2009; cited by Ananda et al., 2017).

In the realm of brand love (lovemark), (Kurniawati, 2019) conducted a study investigating the impact of social media marketing activities on brand love. The research, which involved 280 respondents, Nike, H&M, Zara, and Adidas brands, evidenced a positive effect of networks on brand loyalty and cult communities' building. The method used for the research was a non-probabilistic sampling alying a structural equation model run by the AMOS program. The study found that social media marketing activities have a positive impact on "self-expressive" (internal and social) brands and revealed that "self-expressive" brands have a favorable effect on brand love and brand love on brand loyalty. In this regard, Kurniawati (2019) highlights the implications derived from his work, illustrating it as follows:

For example, the content tells us that the brand is used by people with disabilities and non-disabled achievers at the 2018 Asian Games. Managers can enhance "self-expressive" (inner self) brands by providing product size customization options aimed at users with unique body shapes and people with disabilities. Managers can improve "self-expressive" (social self) brands by innovating to create different designs and launch a limited edition series on certain products. Managers can increase brand love by making a membership promotion strategy for customers to get discounts and branded products. Managers can increase brand loyalty by creating product designs that customers remember easily to focus directly on the brand and ignore competing brands.

From this comes an oortunity for managers to enhance social media marketing activities through exciting content stories that inspire the brand.

It is indisputable that the most recent research regarding marketing and communications is currently focused on the digital space, whose accelerated growth and innovation provide new interactivity options for consumers and businesses. Technology, including Artificial Intelligence (AI), predictive learning, and augmented reality, seems to define the paths marketing and advertising professionals must travel (Mendivelso-Carrillo & Lobos-Robles, 2019). Specifically in the field of fashion, according to the analysis of industry trends made by (Del Olmo et al. 2018; cited by Frutos-Torres, 2019) highlight in work "Marketing and Communication of fashion, luxury and lifestyle", very notably, the transformation that the Internet has represented for the fashion industry, both for the transactions that are made through this channel and for the significant role it has played in the dissemination of products.

CONCLUSION AND DISCUSSION

It is imperative to understand the development and evolution of social networks and the changes in the buying habits and relationships between consumers and luxury fashion brands.

2020 turned out to be a turbulent year for fashion brands in the face of the temporary closures of outlets and manufacturing facilities caused by the Covid_19 pandemic.

In this sense, perceiving interests, trends and generating the desire to buy among stakeholders is of fundamental interest when establishing the digital ecosystem's strategies.

The increase of registered users in social networks and the increase in these tools per hour per day leads brands to focus their efforts on generating emotional and committed content with consumers to generate engagement between them and luxury fashion brands.

In 2013, Vallaster and Von Wallach showed that fashion marketers were not sympathetic to social media because of the lack of control. In this sense, luxury marketing still lacked methods for proactive management of consumer-generated media.

Years later, in 2017, there is an increase in research on social networks and luxury fashion. (González-Romo & Plaza-Romero, 2017) detect that these media are fundamental for brands andthe use of storytelling and exhibitions open to the public, which generate online content. (Navarro-Beltra et al., 2017), for their part, show that Twitter is the network with the most significant potential for the fashion world at that time.

According to (Del Olmo et al., 2018), research in this regard has been progressing and positioning social networks as an instrument of loyalty and engagement. In 2019, Pérez-Curiel & Sanz-Marcos highlighted that an excellentonline strategic plan constitutes differential values of success to the brand and popularity. At this point, already a large number of authors, as observed in the theoretical framework, carry out studies on various brands (Gucci, Louis Vuitton, Prague...) and their digital behaviors, with the need to solve the unknown of how luxury brands build their image in social networks and which tools are the most effective. (Wu et al., 2020) suggest that fashion brands must identify social network oortunities, where the online consumer moves, which interacts with the brand mainly through these media.

At this point, some of the most successful behaviors are already highlighted, such as, for example, what (Cristófol, 2019) exposes in the conclusions of his research; a more significant number of publications does not imply a greater quantity or what (Casaló et al., 2019) evidence that IG is the platform most used by fashion influencers and that due to the extraordinary consumer confidence in the products recommended by influencers, all brands should carry out actions on this platform. (Nannini, 2020) exposes that consumer 2.0 prefers to buy clothes that they have seen someone using in their day-to-day, which corroborates (Casaló et al., 2019). Social networks' importance is evident and uncovered in multiple studies, as shown by (Koivist & Mattila, 2020). They demonstrate that the joint creation between user and consumer can increase the market's visibility through an experimental event.

To conclude, this study explores the evolution of digital marketing in the world of luxury. This review reveals the initial shortcomings in the area, the lack of knowledge and confidence regarding these alternative channels, and the informal ways of interacting with them.

Today, customer, the user, or consumer engagement is focused on the interactive experience and the shared creation of value. It refers to a process in which, through reliable and sustained customer service on the part of the brand, the consumer is driven so that he/she offers his/her recommendation in blogs or forums, among others. "In online marketing, engagement describes the emotional involvement shown by the followers of a company in social networks" (Ballesteros- Herencia, 2019).

Marketers are building their repositories of consumer insights by systematically looking for ways to report what consumers think, experience, and say to each other (B2B). In an ever-ready world in which media use is migrating to digital, advertising can be skied or blocked, and content can be consumed on-demand, marketers have to find new ways to distinguish between aspects of consumer behavior that will remain the same and those that will change (Vollmer & Precourt, 2009).

The development in the online market has, according to various forecasts, a bright future and will continue to develop, which has opened up Business-to-Costumer (B2C) and Consumer-to-Business (C2B) communication oortunities in which fashion companies have discovered new capabilities to reach their prospective customers. This, also, has transformed them into sustainable companies in the market, with better oortunities to create competitive advantages compared to the conventional retail environment (Kim & Lee, 2002). One of the best-known initiatives is Branded Content, which is based on creating content that attracts consumers and is closely related to the brand's values in question.

It should be noted that Branded Content, according to a report prepared by Infoadex in 2020, the 2020 report indicates that the sixth position of this ranking, is occupied by Branded Content, which accounts for 5.0% of the estimated media, with an investment figure of 357.9 million, and outstanding growth of 13.2% about the 316.3 million recorded in 2018. A position well ahead of influencers occupies the eleventh position, with an investment of 61.8 million, a 0.9% share of the total estimated media, and a year-on-year growth of over 65% in its investment figure.

Finally, and in correspondence with the research on this type of trends in online marketing strategies and the use of social networks for this purpose, (Castillo-Abdul et al., 2020), after alying a co-word analysis method, highlights the topics of most significant interest concerning Branded Content are "fashion" and "fashion films", in the search to enhance the communication of the sector, transmitting the values, history, and personality of the brand.

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Endnotes

[1] "*Self-expressive*" brands refer to the compatibility between brands and consumers, in relation to individual self-concepts and how brands allow users to express their opinions to others (Kurniawati, 2019; p.315).

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studio in
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advertising design
fashion design and illustration
product design
stage design

volume three
advanced elective courses in art for grades 10, 11, or 12

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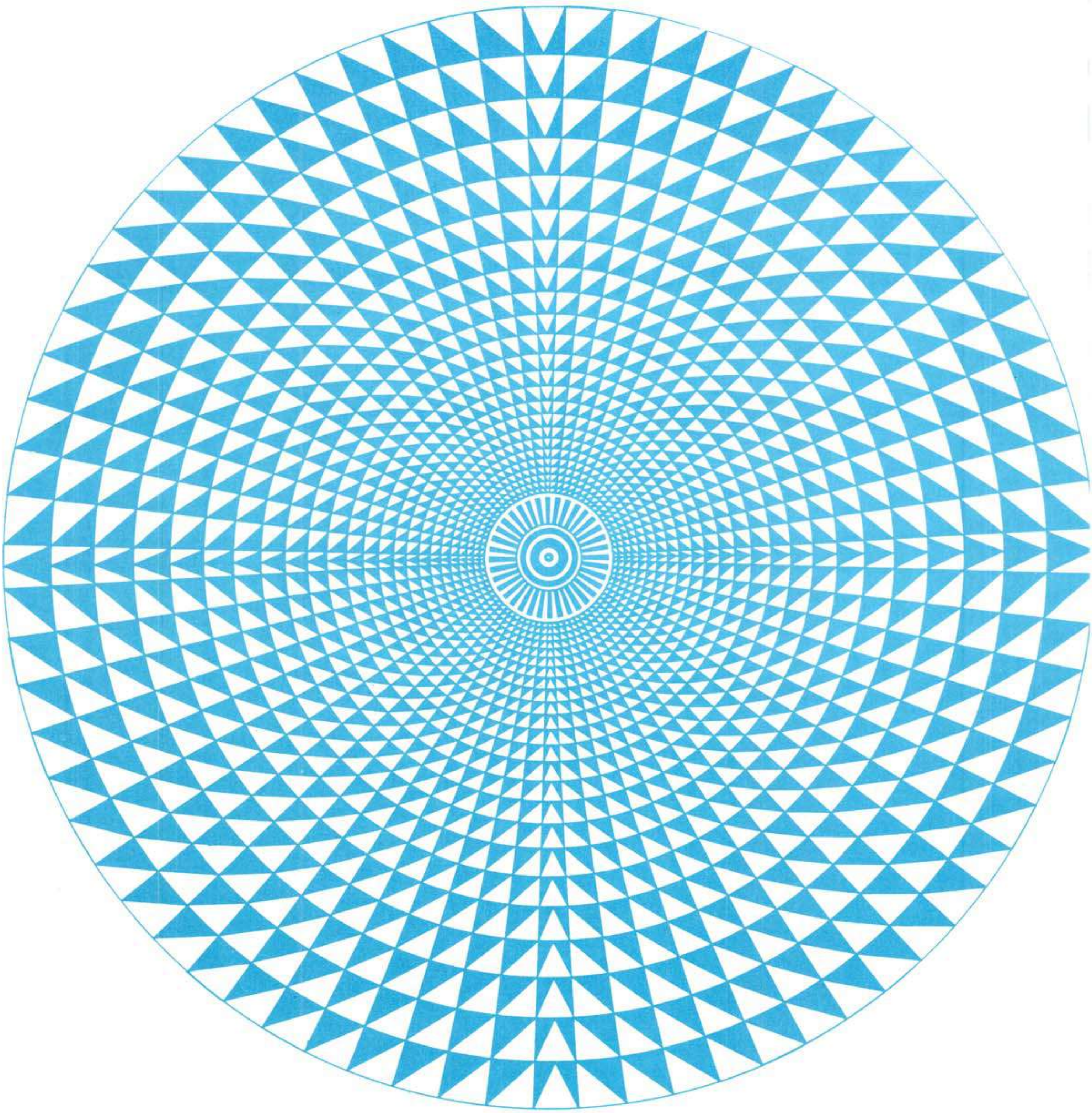

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THE UNIVERSITY OF THE STATE OF NEW YORK / THE STATE EDUCATION DEPARTMENT

FOREWORD

This is the third volume in a series that includes the syllabuses for the advanced elective courses in the art program for grades 10, 11, and 12.

Volume III

Studio in Advertising Design
Studio in Fashion Design and Illustration
Studio in Product Design
Studio in Stage Design

Volume I

Studio in Drawing and Painting
Studio in Graphic Arts
Studio in Photography

Volume II

Studio in Sculpture
Studio in Ceramics
Studio in Jewelry and Silversmithing

As with the other electives, those in this volume may be offered for one unit of credit to students who have earned credit in the basic course, *Studio in Art*. This credit may be applied as part of the three-unit, major sequence in art. See the flowchart of the art program on the facing page.

The following consultants were involved:

Studio in Advertising Design

Minerva Markey, supervisor of art, Niagara-Wheatfield Central Schools—writer of first draft. Brita D. Walker, formerly supervisor of art, (now retired) Milne School, State University of New York at Albany—editor of first draft. William W. Dehn, chairman, art department, Southside Senior High School, Rockville Centre—reviser and contributor to the final manuscript.

Studio in Fashion Design and Illustration

Gilda Simiele, art teacher, Linton High School, Schenectady—writer of the original manuscript. Ann Keagy, chairperson, Department of Fashion Design, Parsons School of Design—reviewer and contributor to the final draft.

Studio in Product Design

Mitchell H. Siegel, director of art, Ossining Public Schools—writer of first draft. Allen Tate, chairman, Department of Environmental Design, Parsons School of Design—reviewer and contributor to the final manuscript.

Studio in Stage Design

William Sola, art department, Ticonderoga High School—writer of first draft. Edgar W. Swift, technical director and lighting designer, Fine Arts Department, State University College at Geneseo—reviewer and reviser of final draft.

The new syllabuses were prepared under the general direction of Vincent J. Popolizio, chief, Bureau of Art Education. The draft materials prepared by the writing consultants indicated above were supplemented and revised by Ernest Andrew Mills, associate in art education, and Harold Laynor, formerly associate in art education, now on the faculty of Millersville State College, Pennsylvania. The layout of the publication was planned by James V. Gilliland, associate in art education.

The curriculum responsibility for preparing the preliminary drafts for publication was carried out by Richard G. Decker, formerly associate in Secondary Curriculum, now retired. Robert F. Zimmerman, associate in Secondary Curriculum, coordinated the final revisions and prepared the materials for publication.

THE VISUAL ARTS

Exploring the Visual Arts

An exploratory course intended to meet the general art requirement for students in grades 7 and 8 by enabling them to experiment with the various forms and media of the visual arts in the contemporary world

COMPREHENSIVE FOUNDATION COURSES

Creative Crafts

A year-long introduction to the fundamentals of 3-dimensional design through the creation of crafts in various materials

Studio in Art

A year-long introduction to the nature, function, and techniques of the visual arts in the present and in the past

Art History and Appreciation

A year-long introduction to man's creative use of the visual arts throughout history, with constant reference to the present and implications for the future

Mechanical Drawing and Design

A year-long introduction to a universal graphic language through which students can express their ideas with creativity, clarity, and exactness

ADVANCED ELECTIVE COURSES*

Creative Crafts

- Studio in Ceramics
- Studio in Sculpture
- Studio in Jewelry and Silversmithing
- Advanced Creative Crafts
- Independent Study

Studio in Art

- Studio in Drawing and Painting
- Studio in Graphic Arts
- Studio in Advertising Design
- Studio in Fashion Design and Illustration
- Studio in Jewelry and Silversmithing
- Studio in Product Design
- Studio in Stage Design
- Studio in Interior Design
- Studio in Sculpture
- Studio in Ceramics
- Studio in Photography
- Cinematography
- Independent Study

Art History and Appreciation

- Ancient Art
- European Art
- NonEuropean Art
- Modern Art
- Art of the Americas
- Architecture Through the Ages
- Esthetics and Art Criticism
- Independent Study

Mechanical Drawing and Design

- Advanced Mechanical Drawing and Design
- Architectural Drawing and Design
- Industrial Design
- Urban Design and Community Planning
- Independent Study

*Titles enclosed in dotted lines are suggestions for locally developed advanced elective courses.

*Minor changes in titles have been made since the publication of STUDIO IN ART—A COMPREHENSIVE FOUNDATION COURSE.

ACKNOWLEDGMENTS

Examples of student art have been used whenever feasible to illustrate concepts and processes included in this volume.

Sincere thanks are extended to the following for their contributions:

Photographs of Art:

Studio in Advertising Design

Brentwood High School, Brentwood
Cicero High School, Cicero
Hempstead High School, Hempstead
High School of Art and Design, New York City
Kingston High School, Kingston
Livonia High School, Livonia
Rye High School, Rye
Southside High School, Rockville Centre
Washington Irving High School, New York City

Photos of historical advertisements have been supplied by Sandak, Inc., Stamford, Connecticut. Illustration on page 3 was supplied by the Schenectady Racquet Club.

Studio in Fashion Design and Illustration

Southside High School, Rockville Centre
Lindenhurst High School, Lindenhurst
Northport Senior High School, Northport
Brentwood High School, Brentwood
High School of Art and Design, New York City
Washington Irving High School, New York City
Linton High School, Schenectady
Woodlands Junior-Senior High School, Hartsdale
Kingston High School, Kingston
Niagara-Wheatfield Senior High School, Sanborn
Livonia High School, Livonia
Bay Ridge High School, Brooklyn

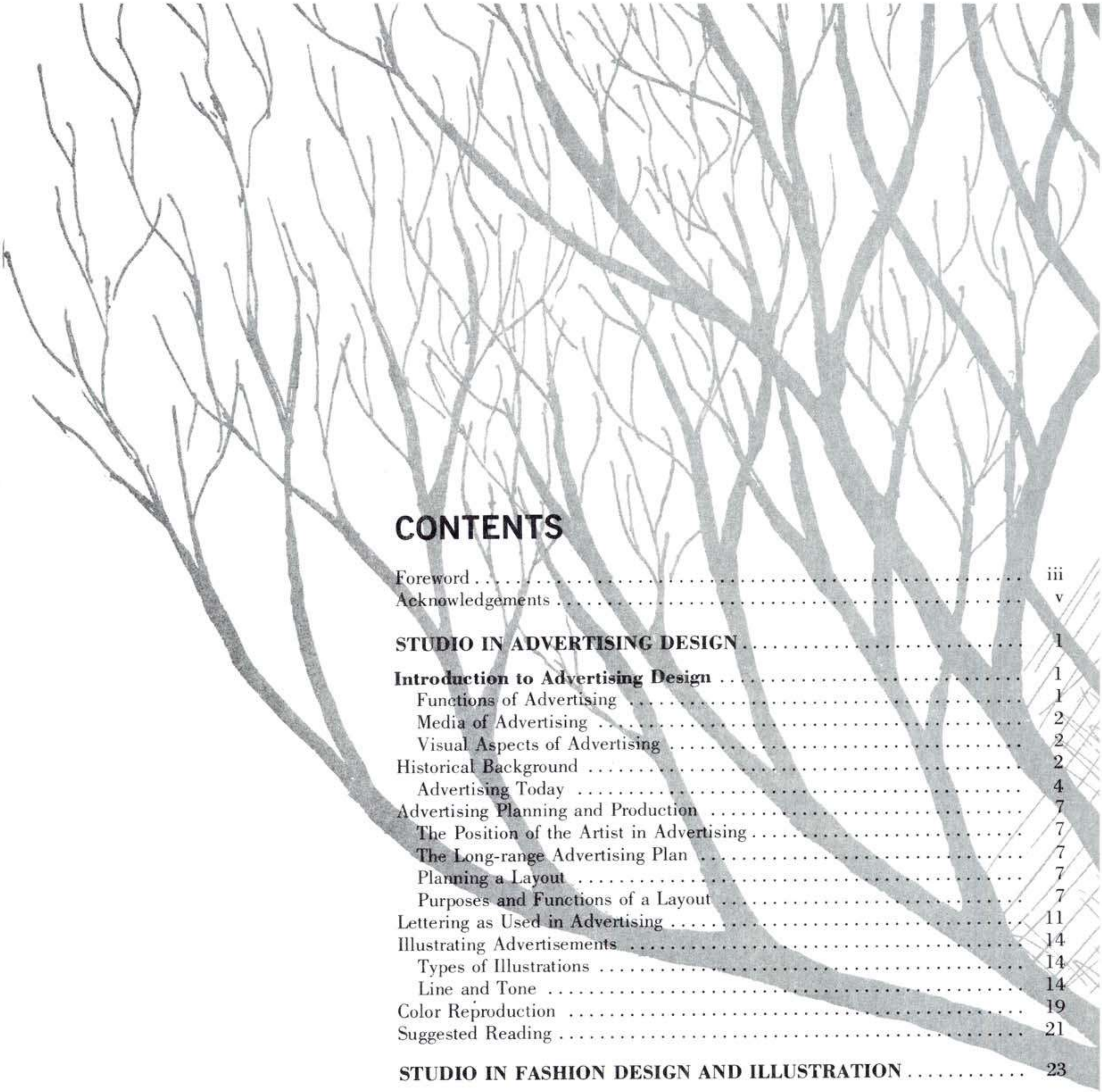
Studio in Product Design

High School of Art and Design, New York City
Patchogue-Medford High School, Medford
McKinley High School, Buffalo
Kenneth Hunt Associates, Albany

Photos of historical products have been supplied by Sandak, Inc., Stamford, Connecticut.

Studio in Stage Design

High School of Art and Design, New York City
Tonawanda Senior High School, Tonawanda
Southside High School, Rockville Centre
Warsaw Central School, Warsaw
Brentwood High School, Brentwood
Northport Senior High School, Northport



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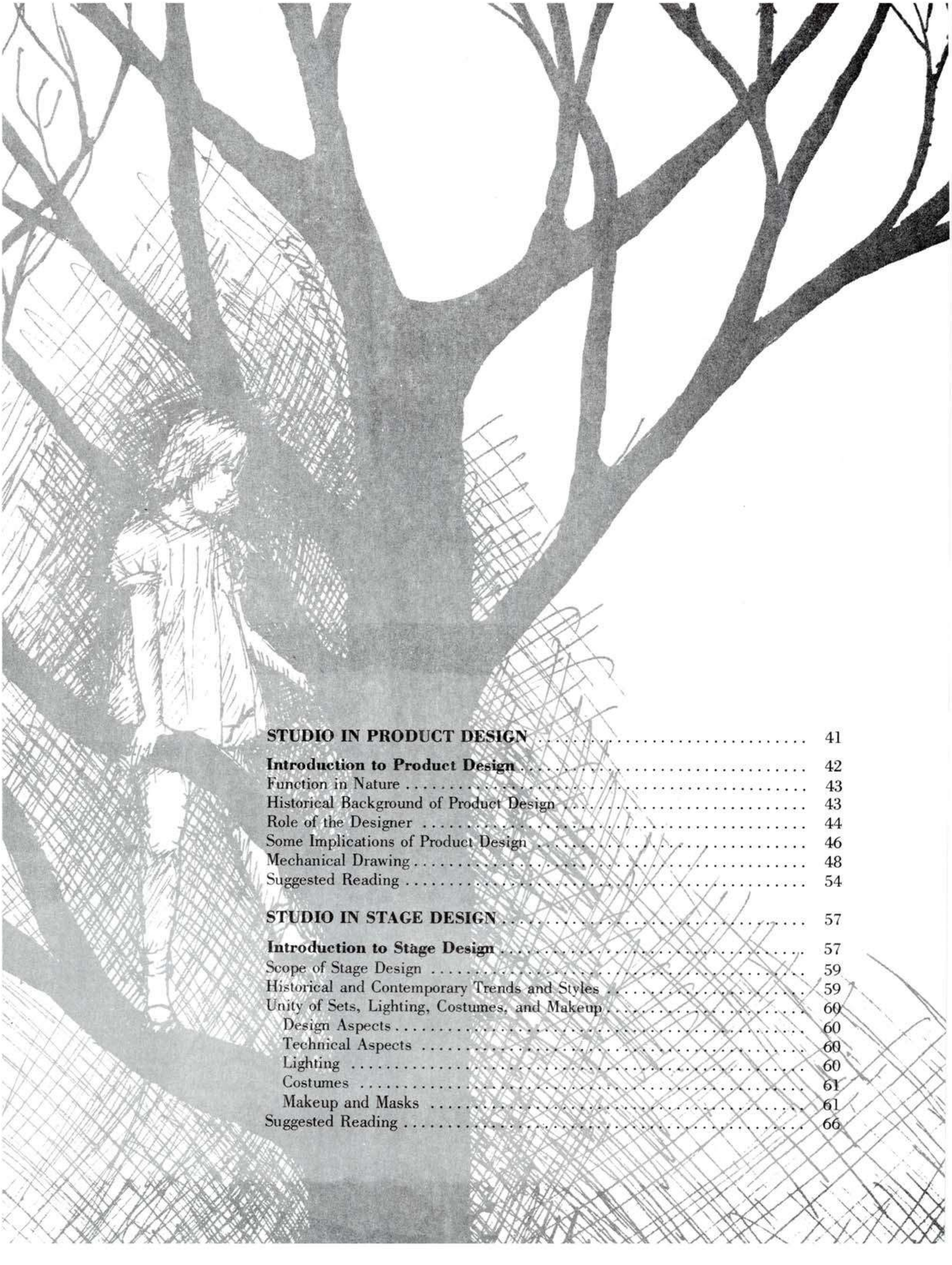



I MARRIED ADVENTURE
I MARRIED ADVENTURE
JOHNSON

STUDIO IN ADVERTISING DESIGN

COURSE DESCRIPTION

This is an advanced course to be elected after a student has completed a full year of *Studio in Art*. It is designed to help students develop a knowledge and understanding of the esthetic principles and skills involved in advertising design.

SCOPE

This course covers the development of advertising, its function, and the production processes involved. Experiences similar to those found in advertising agencies should be simulated in the classroom and there should be emphasis on retail advertising and display. See the Product Design section of this publication for detailed discussion and activities in packaging and product design. Many of the activities covered deal with black and white line and tone since most high school students will not become involved in multicolor reproduction.

STUDENT OBJECTIVES

Upon satisfactory completion of unique segments of this course of study, a student should be able to demonstrate:

- Creative thinking in the preparation and execution of high quality advertisements
- The ability to evaluate esthetic qualities in advertising art
- Awareness of the impact of the advertising media on the consumer and the public, and an incentive for upgrading the quality and relevance of advertising
- Awareness of the esthetic principles and skills involved in advertising, and successful application of these principles and skills
- Essential techniques and the skillful use of tools and materials, as well as an individual approach to problems involving technique, media, and tools
- Research and study of current trends in advertising through the constant use of newspapers, periodicals, professional books, and mailing list materials
- Awareness of the history of advertising with an understanding of its place both in creating a wide demand for products and services, and in making possible the introduction of new inventions, designs, or uses
- An awareness of the vital role that advertising plays both in communicating business concepts visually, and in reflecting a concern for mankind and the environment.

INTRODUCTION TO ADVERTISING DESIGN

The following ideas may be developed through discussion and demonstration:

Functions of Advertising

Advertising is a means of communication for the purpose of creating acceptance and demand for a product or a service. Generally it attempts to assist in sales promotion through verbal and visual messages intended to persuade the public to buy a product, patronize a service or business firm, or accept an idea. Advertising design combines words and visual images in order to enhance communication. The designer must develop the visual means to solve the client's communication need while satisfying his own desire for esthetic creation and achievement.

In a highly competitive field, with the constant influx of new products and improvements in old products, it becomes necessary for the advertiser to publicize the excellence and superiority of his product. Potential customers must be convinced as to the uses and possibilities of the product before sales can be made in quantity.

Media of Advertising

Advertising may appear in various media: newspapers, magazines, billboards, mailing pieces, television, film, radio, packaging, counter displays, and window displays.

Visual Aspects of Advertising

Advertisers use unique visual means to catch the attention of the public. Color, size, shape, and texture are employed in effective combinations to secure emphasis, contrast, and rhythm, and to direct the eye to important parts of the composition. At times the advertisement may produce a visual shock or surprise.

Components of an advertisement may include a number of items, such as the name of the product or service, the name of the firm, headlines, text, trademark, illustrations, decorations, and borders.

Advertisements may be two-dimensional (as in magazines, newspapers, or posters), or three-dimensional (as packages, window displays, or counter displays). A fourth dimension, time, is also used, as with moving displays in windows, on counters, or in outdoor locations. Television and film advertisements reenforce the visual image with a soundtrack.

Historical Background

The history of modern advertising begins with the invention of movable type and of the printing press. These inventions gave rise to the establishment of newspapers and magazines.

Most of the early periodical advertisements were small, crude, and unattractive. As early as 1743, the first half-page advertisement appeared, and about 25 years later the first art border was used. Benjamin Franklin, in his *Pennsylvania Gazette* (an ancestor of *The Saturday Evening Post*), introduced the use of the illustration in advertising (1774). At the same time, some newspapers were using type in various styles and sizes to attract the eye.

From 1840 to the Civil War, newspaper advertising grew by leaps and bounds. Much of its growth was due to the small notices of local tradesmen.

Posters made their appearance in the middle 1800's, when they were to be seen on every vacant wall. People began to realize the potential of outdoor advertising as a profitable business, so that by the end of 1860, space was leased to businesses for outdoor advertising. This was the beginning of the billboard business as it is today.

The poster as a collectable art form (particularly by young people who cannot afford original art) has also stimulated great interest among high school students in recent years.

Suggested readings on posters include:

Darracott, Joseph. *Posters of World War II*. New York: Dover Publications, 1974.

Hutchison, Harold F. *The Poster: an Illustrated History from 1860*. New York: Viking Press, 1908.

Walker, Cummings G. *The Great Poster Trip*. Palo Alto: Coyne & Blanchard, 1968.

As the number of newspapers grew, the number of advertisers increased. In 1847, 11 million advertisements appeared in 2,000 newspapers. During 1860, with the improvement in transportation and communication, and the growth of large industries serving wide sections of the country, advertising grew into a national business worth over $6 million a year.

Journalism and advertising progressed hand in hand and, following the Civil War, magazines such as *Harper's*, *Scribner's*, *The Atlantic Monthly*, and magazines for women and young people grew steadily.

Newspapers progressed more rapidly than magazines and headed the field in advertising until 1870. Gradually magazines accepted more advertisements; however, these were limited to either the front or the back of the publications, and were never placed where they might interfere with the text matter.

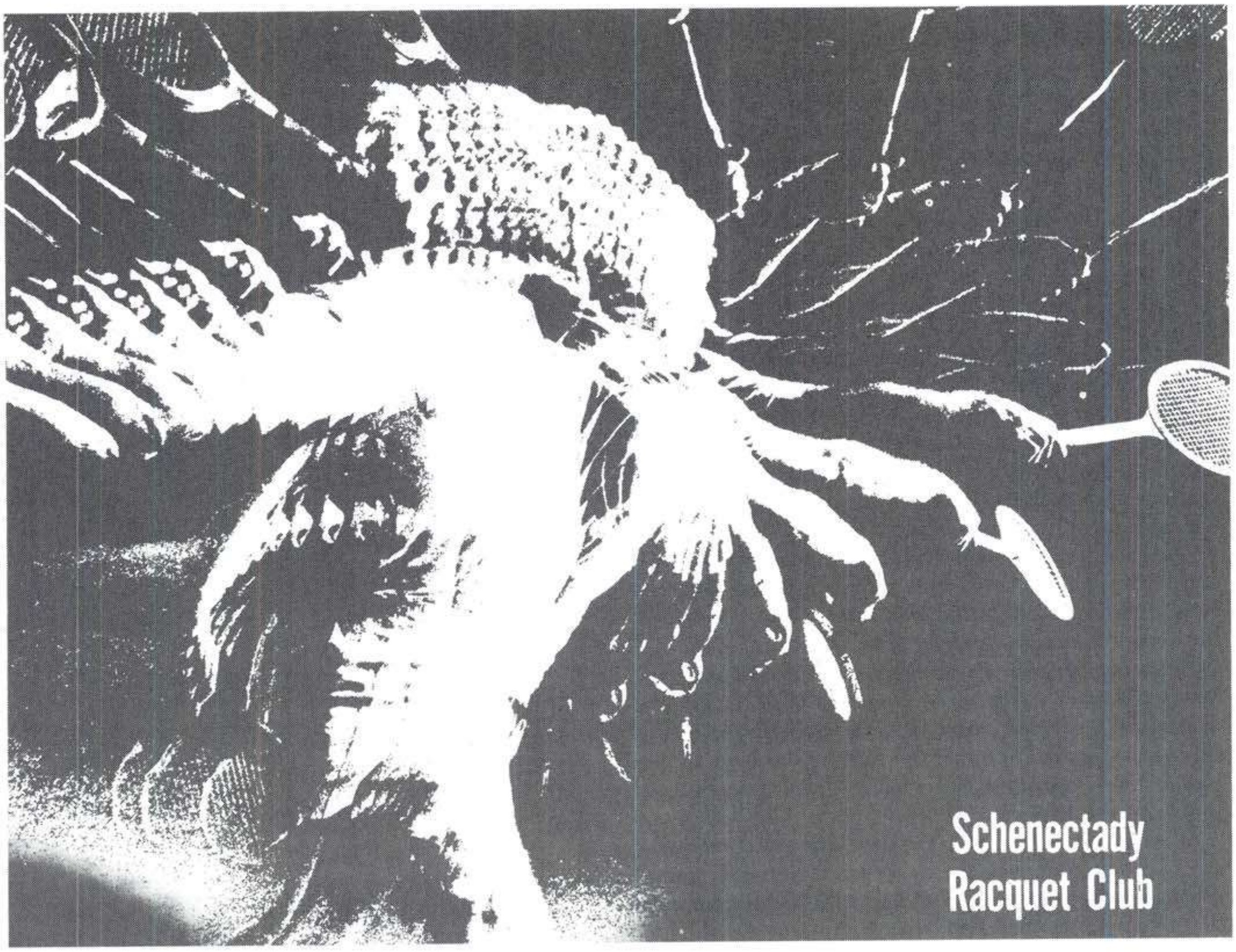
With the great strides in the development of technology of production, with the improved facilities in transportation and communication, and with highly competitive markets, merchants and manufacturers were obliged to look for a forceful, powerful, esthetic, and profitable means of mass selling, with great attention given to visual quality.

(page 2, left)
ADVERTISEMENT FOR SOUTH SIDE R.R. LONG ISLAND Anonymous, 1873. Lithograph, 13″ × 19½″. Landauer Collection, New York Historical Society.

(page 2, right)
THE DEMOCRATIC TROJAN HORSE Arthur B. Frost (1851–1928). Cartoon engraving, 9¼″ × 11″. "Harper's Weekly," July 31, 1880. New York Historical Society.

(page 3, top)
THE "BRAINS" Thomas Nast (1840–1902). Cartoon engraving, 5″ × 5″. "Harper's Weekly," October 21, 1871. New York Public Library.

(page 3, bottom)
FIGHT OR BUY BONDS Howard Chandler Christy (1873–?), 1917. Poster, Third Liberty Loan, 30″ × 40″. Museum of Modern Art, New York.



Advertising Today

A great number of media of various kinds are commonly known and in use today, and it may be assumed that every day someone is conceiving a new promotional idea or campaign possibility.

Newspapers, magazines, outdoor advertising, television, and radio carry the main volume of advertising. Each advertiser has a choice of many media to fit his needs and he gives careful consideration to the most suitable media to reach his market economically. For instance, a manufacturer of children's clothing would advertise in a women's magazine rather than in an adventure magazine.

As advertising became a big business and more complex, advertising agencies came to provide the services of the artist, copywriter, and layout man, recommend the media best suited for their clients, determine the selling points to be featured, recommend methods of distribution, and on occasion make recommendations affecting the product itself. Some advertising agencies have several hundred people in their employ.

Most manufacturers and large retail stores have their own advertising staffs. The smaller the staff, the more each member needs to know about advertising in its many aspects.

Discussion

- Have students discuss what might happen if there were no advertising:
  - how this would affect labor, transportation, stores, and factories from the standpoint of economics
  - how it would affect our esthetic tastes
- Have students discuss the artist's function in the selling process as it is affected by the following:
  - attracting and holding attention
  - arousing interest
  - winning confidence
  - creating a desire to buy
  - causing decision to buy
- Discuss the quotation, "It pays to advertise."

- Discuss the future of advertising media such as periodical advertising, radio and television advertising, and direct mail advertising.
- Discuss habits, customs, and fashion trends that might have been promoted or influenced by advertising.
- Discuss the use of morning newspapers, evening newspapers, and Sunday newspapers for different advertising purposes.
- Show the class examples of the wide variety of media available to the advertiser and discuss the similarities and differences of the media and their potential as an advertising device for various types of products, merchandise, or services. For example, how could the school advertise its adult education program? What specific media of advertising could they use? A decision such as this would involve research and budget planning. In thinking about the problem, the students should begin to realize the difficulties involved in selecting a medium.
- Discuss the components of an advertisement, the development of an advertisement, the advertising plan, the different types of products, industries or stores, and types of advertising.
- Discuss the factor of timing in advertising as it relates to specific media—daytime television as opposed to nighttime television, children's shows, etc. Discuss reasons that some advertisers use morning editions of newspapers, others use evening editions; some prefer certain days of the week, others advertise mainly at certain times of the year.
- The student might watch a series of television shows sponsored by various companies and take notes on the methods used to advertise the sponsor's products. To what extent is actual drawing used? How effectively is lettering included? What psychological effects were introduced to make the viewer want to buy the product?

Demonstration

- Select newspaper advertisements, magazine advertisements, posters, packages, record album covers, letterheads, trademark and corporate symbols, direct mail pieces, or any advertisements large enough for the entire class to see without difficulty. Have the class analyze each one carefully and determine which of the functions of advertising each one serves.
- Have the class examine several examples of a packaged food from different companies. A food advertiser seeks a label design that will stand out from those of his competitors and one that will be suitable to both periodical and display advertising.

NETWORK IDENTIFICATION William Golden (1911–), 1954. Advertisement for Columbia Broadcasting System Television Network, 17½" × 11½". Study Collection, Museum of Modern Art, New York.

THIS IS THE ENEMY Victor Ancona and Karl Koehler, Poster. Study Collection, Museum of Modern Art, New York.

ROY ELDRIDGE COLLATES David Stone Martin, (1910 –   ), 1947. Record album cover for Mercury Records, 10½″ × 10″. Study Collection, Museum of Modern Art, New York.

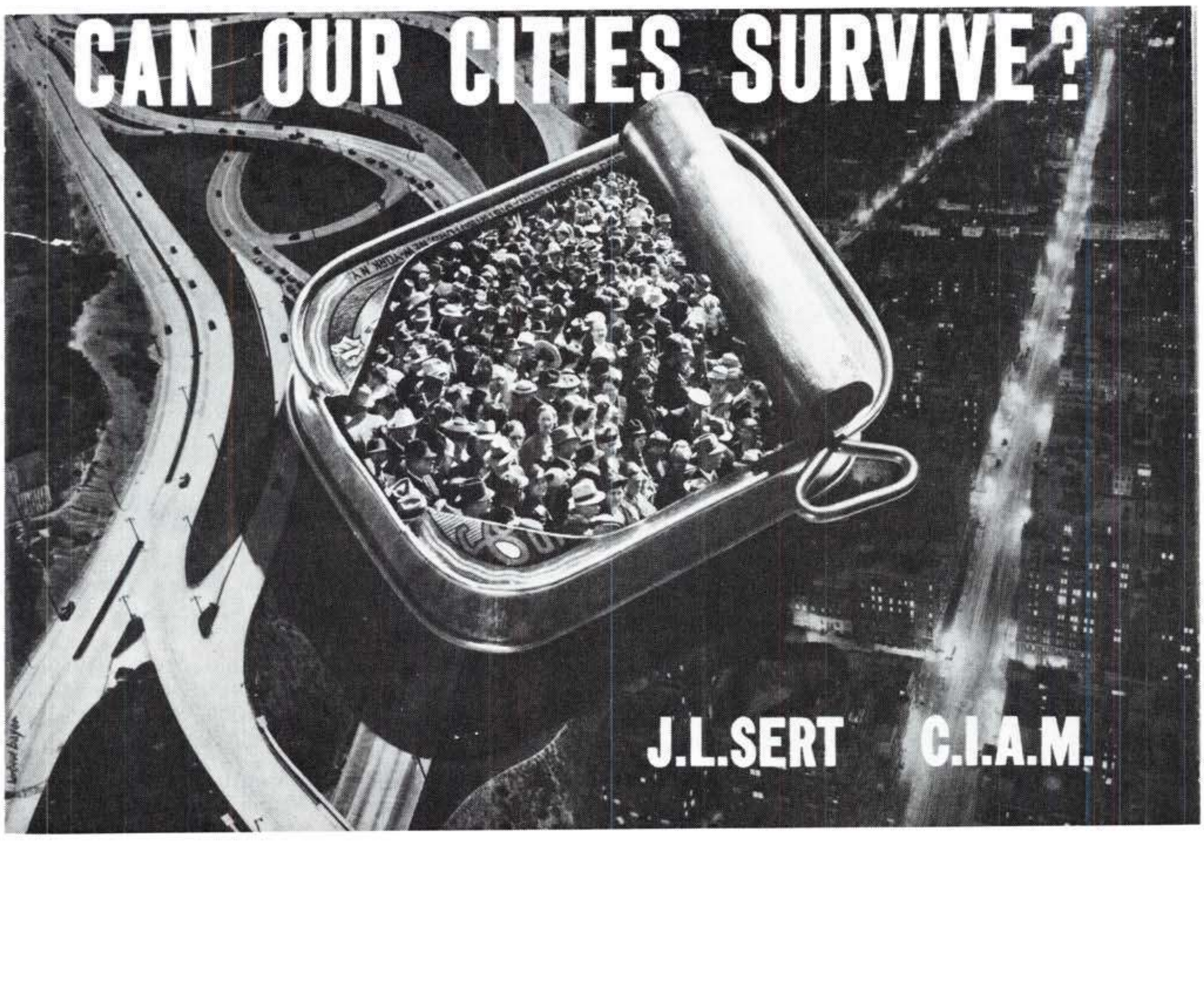
CAN OUR CITIES SURVIVE? Herbert Bayer (1900–   ), Book-jacket, Harvard University Press, 12½″ × 9¼″. Study Collection, Museum of Modern Art, New York.

- Using several well-designed magazine advertisements as examples, review with the class the basic design aspects covered in *Studio in Art*.
- Collect new and old advertisements which demonstrate changes in advertising styles. Mount them in an attractive arrangement and protect them with acetate or spray them with plastic so that they can be used over again.
- Show examples of companies who have changed their logo as a part of developing a new "corporate image," such as MGM, IBM, KRAFTCO, EXXON.

Suggested Student Activities

All material produced by students should be placed in notebooks or portfolios.

- Select advertisements from current magazines; analyze each advertisement and under each, write its function or functions.
- Select a package or wrapper from a well-known product such as a favorite brand of toothpaste or soap, mount it, and list the "attention getters" in the package design.
- Collect and mount examples of the variety of media available to the advertisers: newspaper page, magazine page, record album, book jacket, poster, package, or counter display piece.



Advertising Planning and Production

The Position of the Artist in Advertising

The art director or individual artist is part of a team which includes the advertiser, the advertising manager, the copywriter, often a market research person, and a specialist in media. In small stores or industrial firms, two or three people might share all these responsibilities.

The Long-range Advertising Plan

The advertising plan is a systematic arrangement involving *what* the firm plans to advertise, *when* it will be advertised, and *how* it will be advertised. A comprehensive advertising plan involving many facets of publicity in various media is called a "campaign." A campaign generally is a major effort, based on a unique idea or selling point, to promote a product or a service. The function of a plan is to:

- specify the departments, services, or products to be advertised
- organize a schedule outlining the dates on which advertisements are to be run (using a 6-month plan, a monthly plan, or a weekly plan)
- estimate the sales of the advertised merchandise
- select the media to be employed, the amount of space to be used in each medium, and the cost of space, both in total dollars and cents and in percentage of sales
- identify the segment of the consuming public to which the advertisement is directed

Since advertising space is compiled at least a month ahead of the running date on the advertising plan, the advertising department knows each merchandise department's amount of space, in column inches, to be included either in a full-page advertisement or a smaller separate advertisement, which will appear at a specific date. For example: Hat bar, 16″; budget sportswear, 28″; budget suits, 36″; budget shoes, 36″. Each department pays for its allotted space.

Planning a Layout

After the objectives of an advertisement have been determined and the medium has been selected, the copywriter and the artist or art director work together to plan both copy and layout. Usually the copywriter plans the copy first and the artist produces a layout, giving the general appearance of the advertisement. In a few instances, the layout might be the dominant feature and thus be produced before the copy is decided upon. In either case, further conferences between the artist, the copywriter, the advertising manager, and others will often result in changes in the original layout.

Purposes and Functions of a Layout

Magazines and Newspapers

A layout is a sketch or plan of the general appearance and makeup desired for an advertisement. Its general uses are:

- to give the advertiser and advertising staff an idea of how the advertisement will look
- to aid the copywriter in adjusting the wording to the spaces allotted to copy
- to aid the illustrator in planning the illustrations
- to aid the engraver, printer, newspaper compositor, or anyone connected in any way with the production of an advertisement

A layout must have visual appeal. It should have clarity, coherence, and simplicity so that it will attract attention and hold the interest of the viewer.

The visual message must be so appealing that it will turn the casual reader into a customer. It must present the message in a compelling manner.

A layout should be representative of the character of the store or manufacturer. Two different firms may possess certain basic similarities, but each has certain unique characteristics that may lead customers to prefer one firm to another. Advertising is one of the means by which the firm maintains this identity. Ways of maintaining continuity in a series of advertisements include the use of specific typefaces, the firm's signature cut, and a consistent style of presentation.

The shape of newspaper and magazine advertisements is usually a vertical rectangle, although squares are also used. For contrast and emphasis, horizontal rectilinear shapes are sometimes used since they afford an opportunity for certain display effects that are not adaptable to a vertical space.

The elements of an advertisement include the advertiser's name (called the signature or logotype), the headline or subhead, one or more illustrations, one or more copy blocks, and borders, rules, boxes, or decorations. Attention is also given to the blank space as a shape or shapes between and around these elements.

The principles involved in layout composition are the same as those for any art structure. All parts must be related to produce a unified, harmonious visual effect. Besides being well arranged and unified, the layout must have coherence or a feeling of relationship among the parts and the whole.

The layout must have balance, which is a sense of equilibrium created through the organization of the various elements. The eye may be attracted by a number of elements in a composition. It is the function of the layout artist to compose the elements to achieve esthetic balance.

According to statistics, newspaper advertising is usually read hastily; therefore, it becomes necessary for the artist to arrange the elements in such a way that the eye travels rapidly through the advertisement from one element to another, usually in order of their relative importance to the sales message. This is called movement or action, an important principle of layout construction.

Layouts are generally worked out on tracing pads or newspaper layout sheets. If tissue is used, a newspaper layout guide sheet is placed under it, and the two sheets are lined up and made fast to the drawing board by a few pushpins or by masking tape. The layout artist then blocks in lightly in pencil the outside limits of the advertisement in accordance with the size of the space previously determined. A few experimental roughs or thumbnail sketches might be the first step. After the artist finds an arrangement that satisfies him, he drafts or sketches in the various elements.

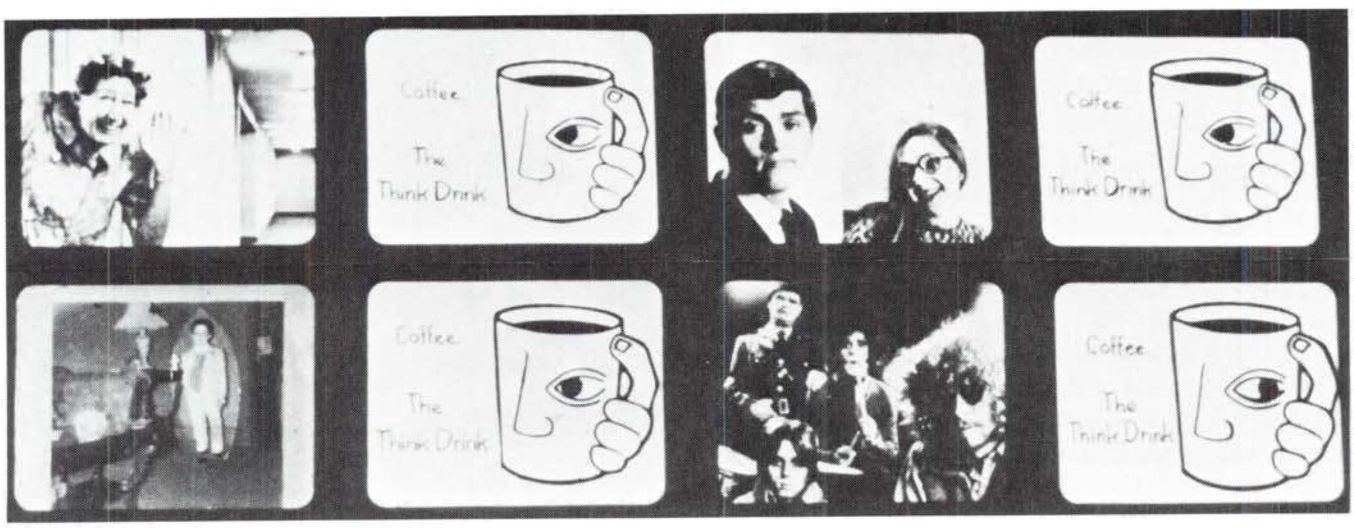
After the rough layout has been approved, it is generally desirable to make a more finished copy. If this copy is to be used to convince the advertiser to give final approval, it is rendered in a finished manner so as to represent as exactly as possible the appearance of the printed advertisement. Such a finished layout is called a "comprehensive."

Television

The student should be made aware of the considerations needed in designing to convey an advertisement as it would appear on TV, billboard, or train station, as opposed to a newspaper or magazine advertisement.

For use on television, a layout may be planned for an immediate visual effect upon the viewer. The layout may be enriched by various means, such as animation and accompanying sound.

The teacher should discuss and illustrate how designing for television is directly related to stage design, advertising design and filmmaking. The same elements of design apply to this field. Of course, in TV the designer is constantly working with moving images allied with sound. The message presented on TV must be immediately understood with one viewing — there is no second chance.



OLIVETTI, LETTERA 22 (series of four). Leo Lionni (1910 –), 1954. Poster, 19″ × 26¾″. Museum of Modern Art, New York.

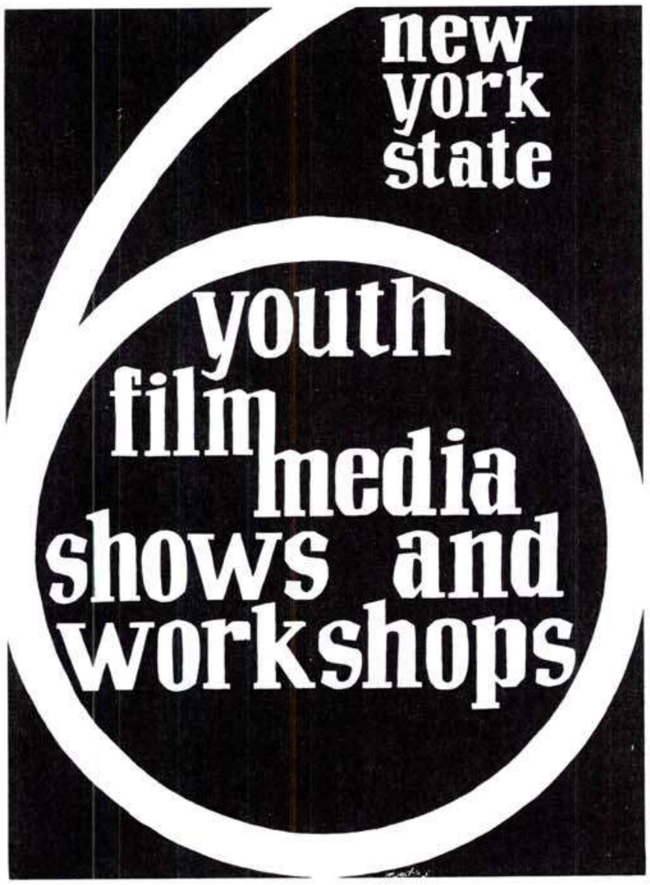
Demonstration and Discussion

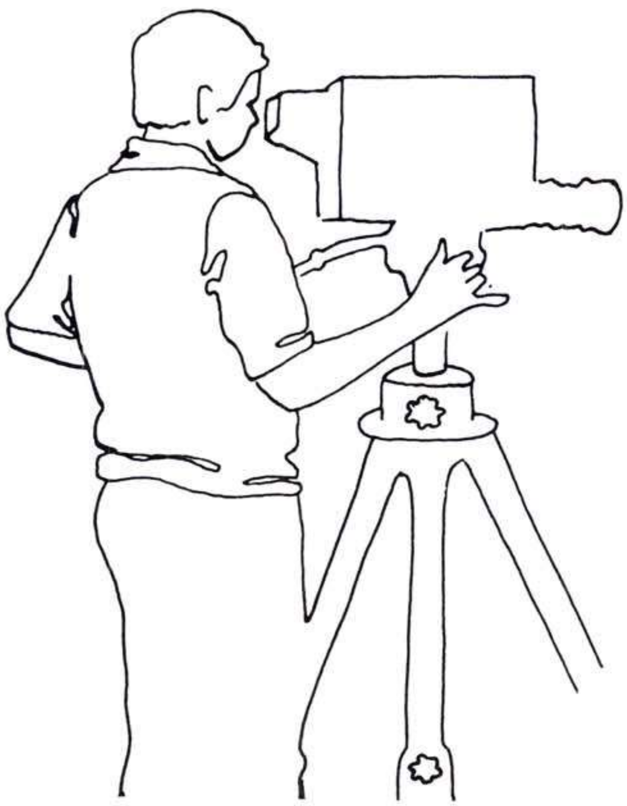
- Demonstrate and discuss the basic materials a layout artist needs.
- Observe and discuss a variety of layouts collected from local stores. Identify the styles, techniques, media, symbols, typefaces, and illustration.
- Clip outstanding full-page advertisements from *The New York Times* and mount them on stiff board. Do the same with full-page or double-page spread magazine advertisements from a variety of magazines. Coherence, emphasis, balance, and movement of the various components can be discussed.
- Organize an interesting visual aid on "The development of a retail advertisement." Include a buyer's request, a schedule or breakdown sheet, copy with markups for type, a layout, artwork, an engraver's cut, a first proof with corrections, and buyer's o.k., second proof, and release order. Show and discuss the various steps and procedures of preparing an advertisement for publication.
- A field trip would afford an excellent opportunity for students to acquire knowledge in the mechanics of advertising and at the same time collect material pertinent to the development of an advertisement. Have students make their own visual aids and use the material for class demonstration and review.
- Discuss the value of organizing layouts in rectilinear areas. Show examples of Mondrian's paintings and examples of advertising that show the influence of Mondrian's compositions.
- Discuss how quality TV productions make use of the visual, movement, and sound.
- Discuss the different kinds of shows: variety, documentary, and drama, among others.
- Discuss current TV programs and the influence of the art director, the set designer, and the graphic artist.
- Visit a TV station and talk with the "back-up" people; see how many of these people have design backgrounds.

Suggested Student Activities

The student might

- Collect several shoe advertisements and cut the advertisements apart to separate each element. Reorganize the elements to form a new layout with the following specifications: 19 column inches, single item advertisement promoting regular price line merchandise. Stress interesting spatial relationships.



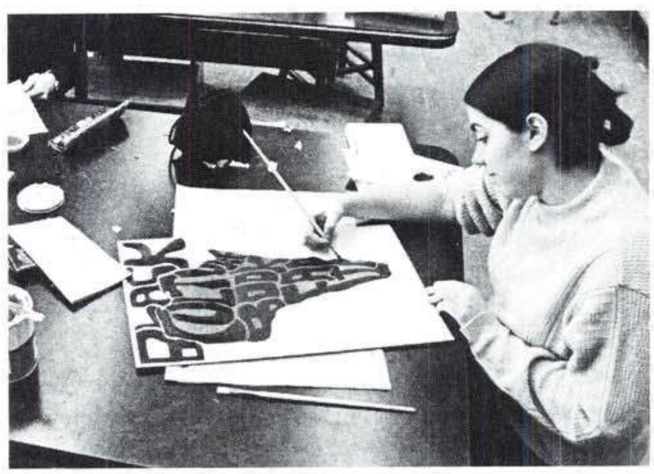


- Organize a 36-inch layout (3 col. x 12″) advertising gift items for a local specialty store or department store, promoting gift-giving for a specific holiday. Emphasize one item and show at least three others.
- Design the title for a favorite television series which will emphasize the characteristics of the show.
- Develop a 54-inch layout (3 col. x 18″) promoting contemporary lamps for a specialty shop or department store, composing the layout in the manner of Mondrian's compositions.
- Work out a 33-inch newspaper advertisement (3 col. x 11″) for a retail store promoting a special sale of misses' and half-size summer dresses for all occasions. Emphasize copy and price with silhouette figures in half-tone behind the copy. Use a combination of boldface type and the words "Special Sale" in hand lettering. Select bold typefaces from a book on typography. Try using a layout pencil, felt pen, or litho pencil to indicate the typography and hand lettering on the layout.

Independent Projects

The student might

- Design an advertisement for a Broadway production which will be suitable for a railroad station, airport, or subway display.
- Design a circular to sell a new art book. Make a rough layout before making a finished layout.
- Design an advertisement for a particular periodical. Fit the advertisement to the media, analyzing the character of the media and the character of its readers.
- Prepare a series of photographs which will be used as an integral part of an ad layout.
- Design a title card for a dramatic show.
- Develop a title card that uses cuts, dissolves, and mixes, and select appropriate music to accompany this title.
- Develop an end credit roller with animation and music for a children's show



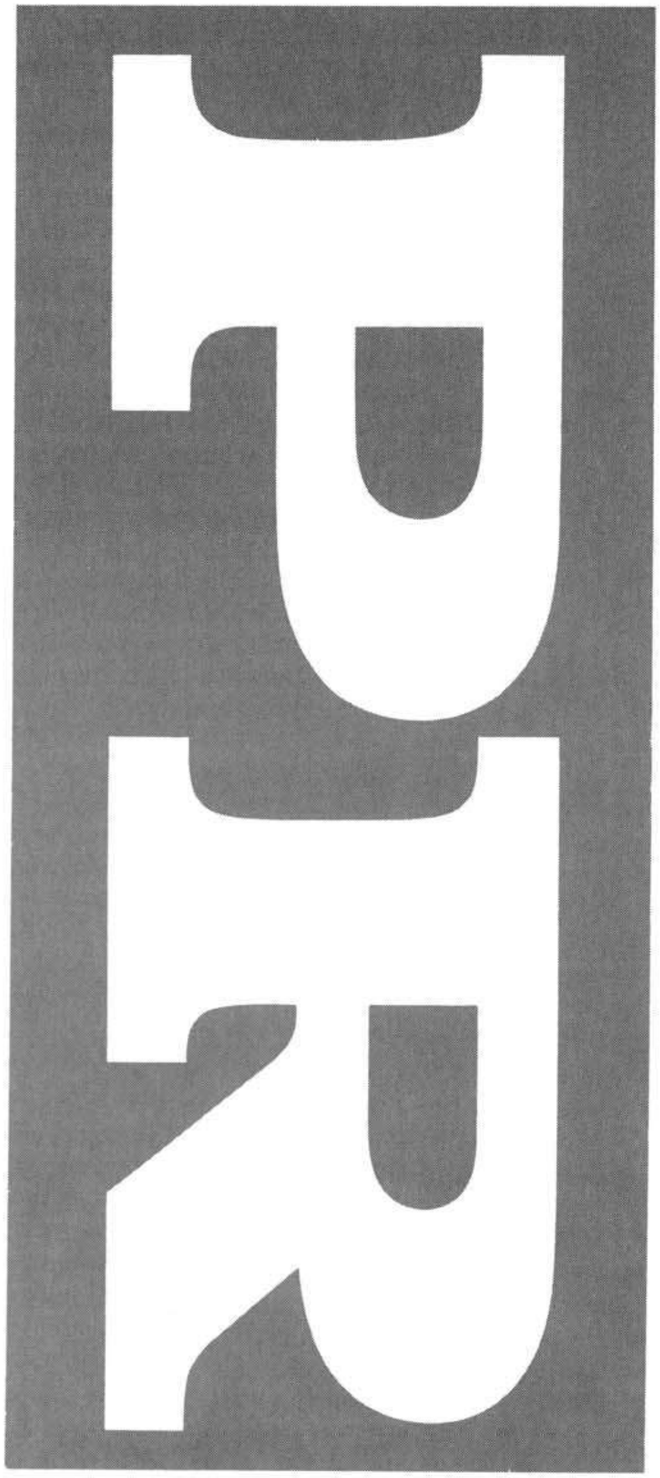
Lettering as Used in Advertising

While this section will be primarily concerned with hand lettering, it should be remembered that type and typefaces play a major part in this field. Actually, all typefaces were once originally hand drawn, designed, redesigned, engraved, and cast over and over again. Much can be accomplished by the specification of typeface, size, color, and through the use of prepared lettering which may be cemented to the surface of the finished reproduction copy or transferred by burnishing (depending on the particular lettering aid used). It is suggested that the instructor maintain some samples of these various typographical aids so that the student may examine and try them.

Lettering, both hand drawn and typeset, may create an impression stronger than the words themselves. Hand lettering should be appropriate and well designed. It should be readable and expressive. Actually, readability is the primary concern, with beauty giving way to function in the total design.

Consider the following important aspects in designing hand lettering:

- *Size* refers to the relationship between the lettering and the area upon which it appears, and to the space surrounding the lettering and the distance at which the lettering is to be read.
- *Style* refers to the characteristics of the lettering to be used. Most lettering is in one of the following basic styles: roman, italic, gothic, script, and block. Today many novel variations of these styles are being used. The style selected should be consistent with the general character of the layout of the advertisement.
- *Form* refers to the shape of the individual letters and their grouping into words.
- *Weight* describes the thickness of the strokes of the letter. In terms of black letters on white background, the thickest and blackest are said to be the most heavy.
- *Layout* concerns the arrangement of the lettering on a particular surface area within certain boundaries.
- *Spacing:* there are three kinds of spacing to be considered: letterspacing (spaces between letters), word spacing (space between words), and line spacing (space between lines of lettering).
- *Execution* refers to the technical ability demonstrated in the finished work.



Discussion and Demonstration

- Discuss with the class the points outlined above.
- Show samples of lettering used in advertising and discuss the kinds of lettering used, such as roman, gothic, cursive, text, and script. Discuss the meaning of the terms point and pica in measuring type sizes, line widths, and spacing.
- Select examples for discussion in which the inherent character of type itself is used to create effective designs with impact.
- Demonstrate the use of the lettering pen and brush in making various styles of letters.

UNIVERS	ABCDEFGHIJKLMNOP abcdefghijklmnopqrstuv *ABCDEFGHIJKLMNOP* ***abcdefghijklmnopqrstuv***
SCOTCH	ABCDEFGHIJKLMNO abcdefghijklmnopqrstuvwx *ABCDEFGHIJKLMN* *abcdefghijklmnopqrstuvwxy*
TIMES	ABCDEFGHIJKLMNOP abcdefghijklmnopqrstuvwx *ABCDEFGHIJKLMNOPQ* *abcdefghijklmnopqrstuvwxy*
PLANTIN	ABCDEFGHIJKLMNOPQ abcdefghijklmnopqrstuvwxy *ABCDEFGHIJKLMNOPQ* *abcdefghijklmnopqrstuvwxyz*
BODONI	ABCDEFGHIJKLMNOPQ abcdefghijklmnopqrstuvwx *ABCDEFGHIJKLMNOPQ* ***abcdefghijklmnopqrstuvwxyz***
GARAMOND	ABCDEFGHIJKLMNOPQR abcdefghijklmnopqrstuvwxyz *ABCDEFGHIJKLMNOPQ* *abcdefghijklmnopqrstuvwxyz*
BASKERVILLE	ABCDEFGHIJKLMNOPQ abcdefghijklmnopqrstuvwxy *ABCDEFGHIJKLMNOPQ* *abcdefghijklmnopqrstuvwxyz*
BEMBO	ABCDEFGHIJKLMNOPQRST abcdefghijklmnopqrstuvwxyz *ABCDEFGHIJKLMNOPQRS* *abcdefghijklmnopqrstuvwxyz*
PERPETUA	ABCDEFGHIJKLMNOPQRSTU abcdefghijklmnopqrstuvwxyz

Suggested Student Activities

The student might

- Using one letter, develop a design featuring many sizes and positions of this letter shape. Use a monochromatic color scheme to complete design.
- Compose a design using letters from newspaper headlines. Letters should be altered, cut, pasted sideways, upside down, etc., to form an interesting design relationship.
- Using a quadrille paper, letter any appropriate word in gothic letter form. Transfer the word to illustration board using guidelines for accuracy and proper placement. Using india ink, a ruling pen, and a brush, carefully ink in the word. This work may be rendered a number of times, exploring several technical possibilities such as solid and open alternate letters, using shading techniques such as line shading or stippling, or commercial shading for textural effects. Color may be introduced for added interest. A continuation of this project might introduce the idea of extended (wide) letter or condensed (narrow) letters.
- Design a practical, usable lettering project to be used in school using creative lettering appropriate to its intended use.
- Explore the possibilities of forming various letter types with a wide, flat brush and tempera on scraps of matte finish mounting board or bristol board.
- Using a school or community organization as the "client," design several letterhead roughs which would include both type and a visual image.
- Make a portfolio to hold advertising artwork. Design a cover for the portfolio with the name of the course (Advertising Design) and the student's name. Lines and abstract or geometric shapes may be employed, but these shapes and lines must add to the total design and not detract from the message or readability of the lettering. Make several rough layouts in proportion to the actual size.
- Enlarge or reduce a well-known logo lettering, using the cartoon method. Modify the existing logo

OGAN
HISTORICAL ILLUSTRATOR

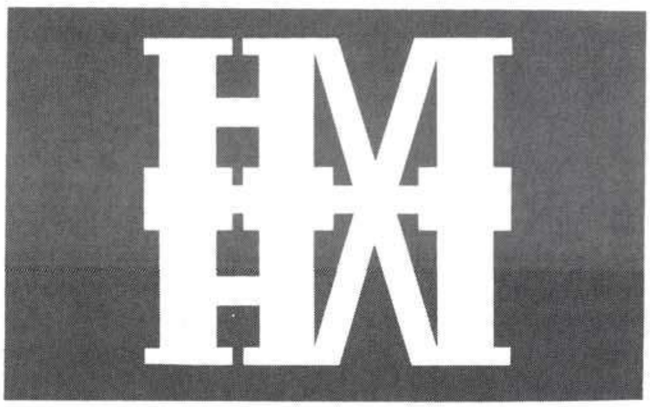
to a contemporary design, being careful to retain the original identity where possible.

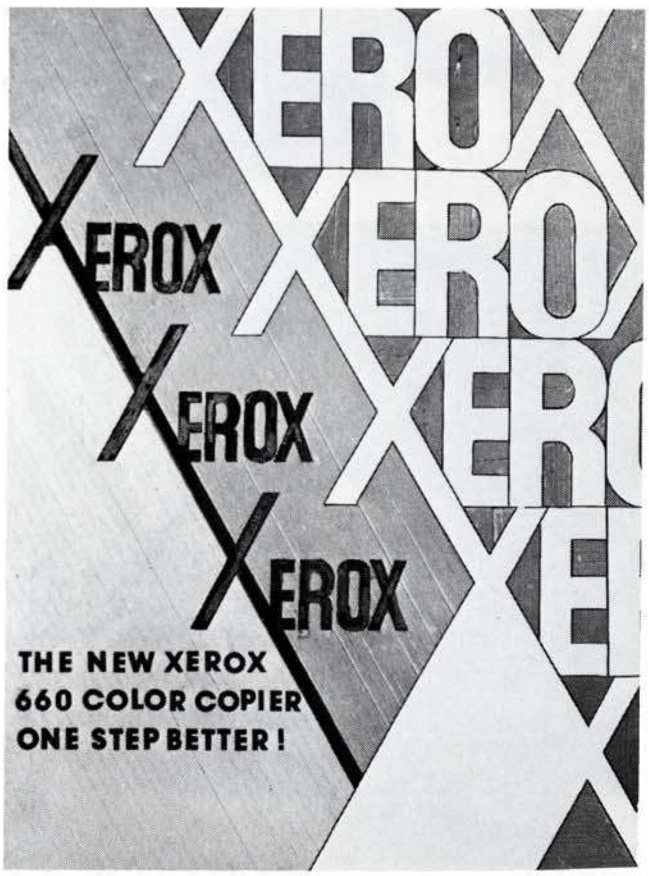
- Develop three-dimensional letters to be made from cardboard, paper, wire, rope, etc.
- Using the student's name, create a design in cutout letters using Colorvue, Coloraid, or construction paper. Design this name as a personalized design reflecting a statement about that individual.

Independent Projects

The student might

- Select and cut out several examples of lettering or typefaces from magazines and newspapers. Identify each cutout as to whether it is derived from the gothic, roman, script, or italic forms. Mount several specimens that illustrate these forms on a sheet of heavy paper and label them.
- Select and cut out several examples of hand lettering or typefaces from photocopies of old magazines and newspapers. Arrange them in an attractive design on a piece of posterboard. These words or letters may be used by themselves or together with illustrations clipped from magazines or pieces of wallpaper or other types of paper, in the manner of a collage. When a satisfactory arrangement has been achieved, paste down the elements in the design.
- Use a carpenter's pencil to explore the area of calligraphy. This pencil can be sharpened with a razor blade to a wedge of any desired width. It is ideal for lettering in making layouts, and its versatility makes it easy to construct any type of letter. In order to maintain clean, clear, and crisp edges on each letter, the pencil should be flipped over from time to time or resharpened.
- Practice drawing with brush and ink, and with lettering pens and ink. Experiment with wavy lines of varied thickness by varying the pressure on the pen or brush, a group of lines made up with short strokes while leaving the tool on the paper, zig-zag lines by changing the pressure of the tool, calligraphic lines of even thickness and value, and crosshatching.





Illustrating Advertisements

Types of Illustrations

An advertising illustration can be a drawing, sketch, painting, design, graphic print, montage, collage, or photograph. It is a picture that usually represents or suggests the merchandise or the idea that is being advertised. An illustration may also represent the advertiser rather than a product. It may be any picture that helps to present the sales message. In most cases the two are inseparable.

Among advertising people there is often some controversy as to which is more important, the illustration or the copy. Each plays an important role, depending upon the purpose of the advertisement and the relative suitability of each in getting across the main idea or sales message.

There are many kinds of illustrations; for example:

- *Descriptive illustration* seeks immediate results, and is accompanied by convincing and descriptive copy, thus making it conveniently possible for the customer to purchase the article merely by seeing and reading the ad. It is similar to the presentation of a product in a mail order catalog.
- *Decorative illustration* expresses a fleeting impression of the merchandise or service. It is usually stylized and simplified and is used for its eye-catching ability rather than its ability to promote immediate sales.
- *Abstract illustration,* as the name implies, is a creative, personal expression of an idea, service, or product. It is a unique interpretation of the sales message and sometimes has little, if any, resemblance to the object or service being advertised. The purpose of an abstraction is to suggest the tone of an advertisement or to catch interest.
- *Photographic illustration* is similar to descriptive illustration. Its purpose is to obtain immediate response.

Line and Tone

Line drawing is the simplest and quickest method of illustrating. The line is a versatile means of conveying a visual design. It can show details, suggest pattern or textures, express emotions, define shape or the illusion of form, and add to illustrations an esthetic sensitivity that is difficult to surpass in any other technique.

Line drawings are commonly made with ink or pencil. From them, linecuts are made. The finished drawing is black and white with no gray tones except those that are suggested by a shading technique such as lines, cross-hatching, or stippling. For newspaper work, where a relatively soft stock is used, the linecut is usually the most satisfactory and least expensive of all illustrative techniques.

Shaded tones for line drawings may be produced by a Benday technique. In this process, the artist uses a gelatin sheet on which there is a fine-grained pattern or texture that produces a shaded tone on specific areas. The artist indicates the areas for Benday effect by outlining them in blue pencil on a tissue overlay placed over the drawing. The value of the tone desired is then indicated in the margins in terms of percentages, as 10%, 20%, etc. The artist may also apply a transparent Benday sheet directly over the drawing, scraping off the Benday pattern where it is not wanted.

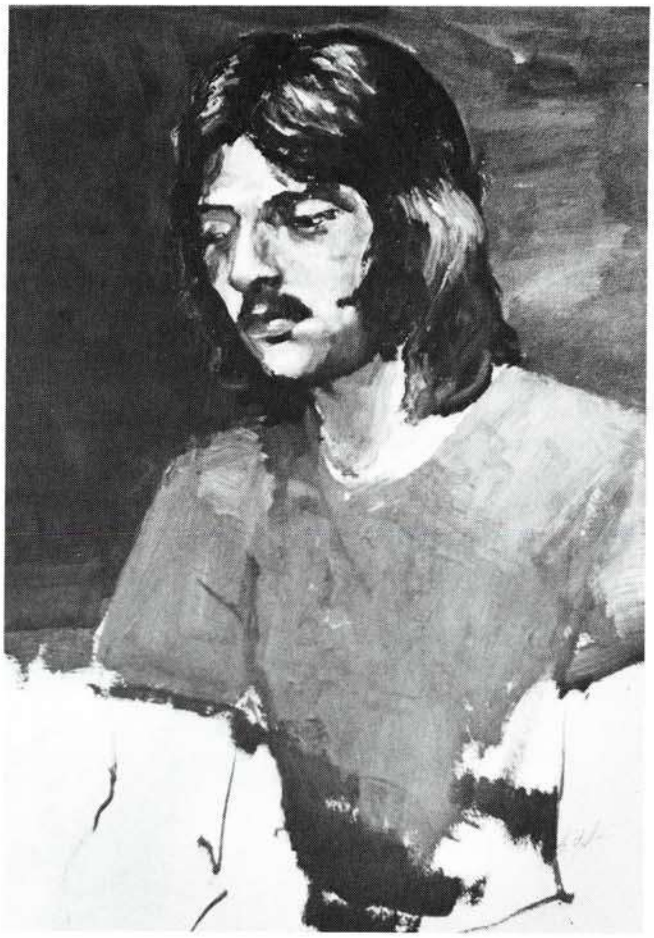
The development of dry transfer lettering, and tonal and textural sheets for effects in screening and line production, has provided advertising artists with an array of commercial art products from which to choose. Students should become familiar with the commercial names of many of these products.

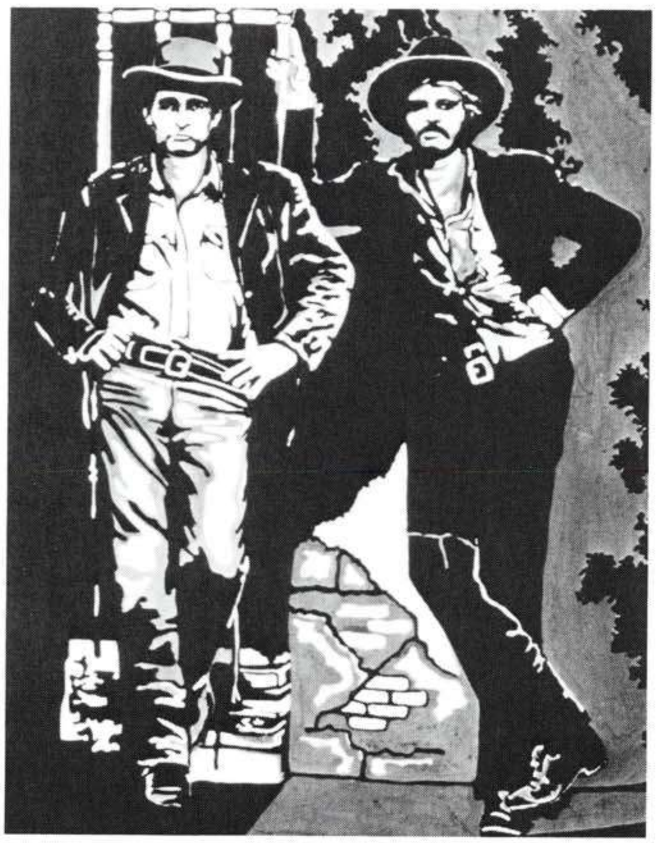
For newspaper advertising, which uses low-quality, soft paper stock and high-speed presses, subtle rendering techniques are impractical. A simple treatment in either line or combination of tone and line is more satisfactory.

For magazine and brochure advertising, which uses high-quality paper and slower presses, the artwork can be rendered with more subtle techniques.

Since both color and black-and-white photographs have been used extensively as illustrations in advertising more and more in recent years, many art students find the camera an indespensible tool.

Advertising illustration requires a particular flair and technique, and requires a strong foundation in drawing and design. The advertising designer must have discriminating taste, keen visual perception, and a sensitivity to the public market.





Discussion and Demonstration

In completing the projects listed, and in demonstrating techniques, it is advisable to acquaint and familiarize the students with commercial materials used in actual studio situations. Colored, coated papers, dry transfer lettering, and texture sheets (Instantype, Letraset, etc.) should be used wherever possible to enhance the design.

- Discuss:
  - — the reasons that illustrations are used in advertising
  - — the use of photographs as illustrations (strengths and weaknesses)
  - — why retail advertisers often prefer drawings of fashion merchandise to photographs
  - — why a knowledge of engraving and printing is necessary to the illustrator
  - — the difference between a line drawing and a tone drawing
  - — the limitations in the Benday process of representing tone

— the various characteristics (and advantages and disadvantages) of methods of reproducing line art — line engraving, letterpress, offset lithography

— the importance of size when reducing or enlarging drawings

- Discuss the tonal effects added by the artist or by the printer and the way art is prepared for each.
- Show and discuss line technique in full-page advertisements from local papers and *The New York Times*. Try to show a variety of techniques. See if the students can distinguish between pen and ink technique and brush and ink.
- Demonstrate line technique with a variety of materials such as different sized brushes, ink, litho pencil, different sized penpoints, mechanical holders, and different kinds of illustration paper and board.
- Demonstrate with various tools how hand pressure and direction of stroke affect the character of the line.
- Discuss calligraphic line, sensitivity in line, variety in line, and freedom and flexibility of technique.
- Demonstrate the application of a tone by:
  — dry brush method
  — flat tone (wash)
  — graded tone (dark to light, light to dark)
  — value change (in separate areas): controlling the value by the amount of pigment added to the water
  — wet on wet background
  — wet on dry background; built-up tones (flat value on flat value)

Suggested Student Activities

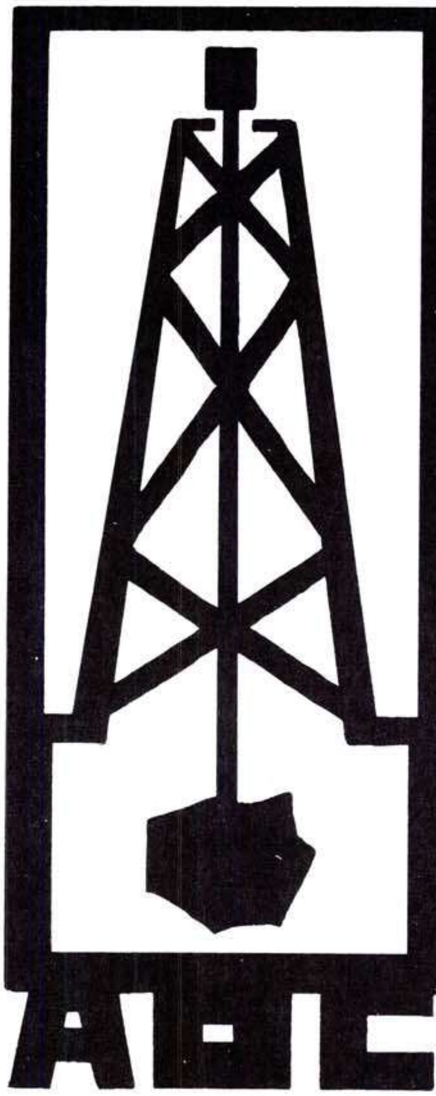
The student might

- Sketch a few simple objects—tumbler, bowl, coffee pot, pitcher, or creamer. Select a technique such as line or wash, or a combination, and render in a simple treatment. The objects are not to be rendered as in a watercolor painting, but rather as a commercial product that must have sales appeal. The illustration must show off the merchandise and be painted in detail.
- Substitute textural and tonal sheets for the use of brush and paint. Investigate commercial screening sheets. Render the desired effect using scratchboard. Investigate the qualities obtainable with the airbrush.
- Try drawing and rendering, in line and/or tone, accessories such as handbags, jewelry, shoes, or cosmetics. Work from the actual merchandise and glance at professional artwork of similar merchandise for inspiration.
- After discussion of characteristics of the fashion figure, practice drawing from a model. Have a series of poses, starting mainly with "quickies." To get the action of the pose is important, but also stress refinement of proportion, grace, elegance, and style. After about two weeks of figure drawing, (include men's fashions) the student should select the best sketches and render in the technique he prefers.
- Plan a campaign to promote a new product. Include newspapers, posters, direct mail, television, and magazines. Include a time schedule and all pertinent data, as well as examples of layouts or other materials for each medium.
- Design a menu for an exclusive restaurant featuring foreign cuisine. Plan a cover and do one page of lettering, paying careful attention to the kind of restaurant and types of food served.
- Plan a project in illustrative cartography. This might be a map for a restaurant placemat, or a state or regional map designed to attract tourist trade.
- Design a folder for direct mail advertising. This may be for books, clothing, or any material that lends itself to the medium.

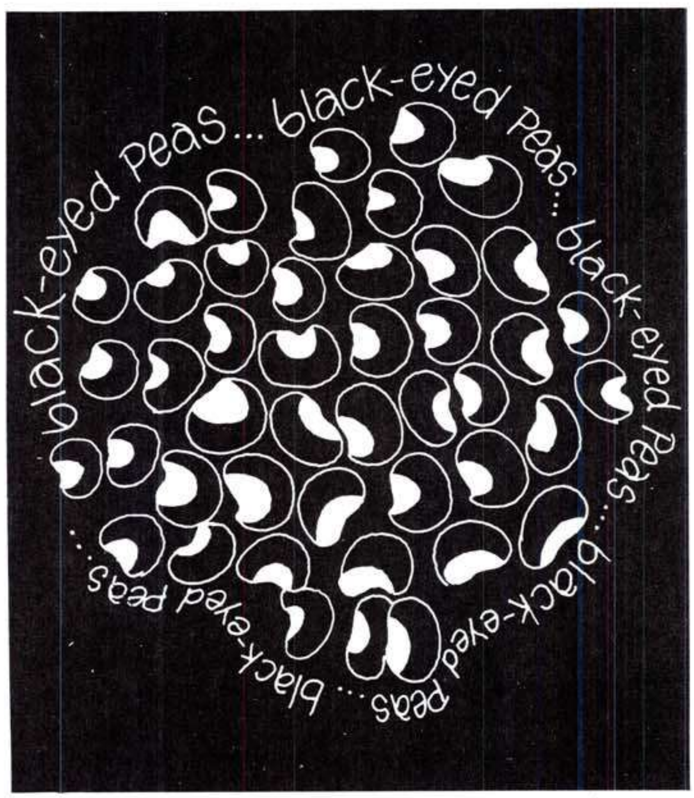
Independent Projects

- Newspaper advertisement: create a fashion illustration that includes a copy block.
- Logo redesign: select an existing example and redesign it for contemporary appearance.
- Display case (three-dimensional): design the full display effect, including shelves, backerboard, objects, and lettering.
- Displays: create a moving counter, floor, or window display.

- Counter display (three-dimensional, for bookstore or travel agency): make it collapsible for mailing and easy assemblage.
- Cover design for a drama club production: include linecut and color separation.
- Cover design for a yearbook, adult education bulletin, school or district publication, etc.
- Double-page design for a yearbook.
- Cardboard printing (two- or three-color separation): include copy block and headline.
- Costume design and rendering: work out an adaptation of a historical costume or costume design.
- Kinetic illustration: illustrate a machine-made product or mechanical instrument showing radius of movement. Cut a photograph into strips and shift their position to suggest motion.
- Tonal separation (designed from a photograph): make a tracing of the photograph to simplify the image into selected areas of black, white, and gray; to black and white only; to dots only.
- Greeting card (humorous): select occasion and theme, and create copy.
- Montage (magazine, cut paper): select a theme.
- Extended line montage (magazine, cut paper, or photograph): complete selected area(s) by extending lines from objects defined and omitting the background at these points.
- Transferal montage (from printed matter): rub ink from printed image onto new surface, organize placement for design effectiveness.
- Poster design: select a theme such as narcotics, environment, or antismoking.
- State or country travel poster: create a poster layout advertising a particular state or foreign country. Use lettering that characterizes the name, and a symbol or illustration associated with that area.
- Mailing brochure (for reproduction): design a circular advertising the student art exhibit.
- Stationery design, either personalized or for a specific product or company.
- Family coat of arms: present authentic examples, discuss and research heraldry. Do not attempt an authentic design, but a whimsical interpretation symbolizing personal and family interests.
- Portfolio presentation: include instruction in matting and mounting, and in designing the complete presentation.



AMERICAN OIL COMPANY INC



Color Reproduction

Although most of the activities covered above deal with black and white line and tone reproduction, it is suggested that the teacher review the preparation of artwork for color printing, as well as the reasons for using or not using color.

Color can be effective in attracting attention in all forms of advertising, and can serve these functions:

- — direct attention to the advertisement
- — present more realistic objects, scenes, or people
- — emphasize a special message about a product
- — suggest or enhance an abstract quality of the product
- — make a pleasant first impression
- — create prestige for the advertiser
- — lock visual impressions in the memory of the customer

Almost any full-color picture can be reproduced faithfully by combining the basic colors — red, blue, and yellow — with standard black. The basic colors are combined in varying proportions to produce all other colors. For example, translucent blue ink printed over yellow produces green.

Color printing is much more expensive than one-color printing, primarily because of the additional presswork involved. The finished product consists of a separate printing impression for each color of ink used. Thus, full-color printing requires four impressions; two-color printing, only two.

Three-color, " flat color " advertisements, for example, are produced by three separate printing impressions. Each color area is indicated on a separate overlay by the artist, and a plate is made for each basic color. The three images are then printed on top of one another to produce the final print.

A more realistic, more expensive, type of color reproduction is " process color printing," whereby an original is reproduced as a halftone from four separate plates, each inked with a different basic color. The original is photographed and photochemically made into four halftone negatives, or " separations," each carrying a different basic color. Thus, the image on each negative will vary according to the distribution of that color in the original. A plate is made from each negative and receives the proper ink color, then all four plates are run in sequence over the page, in close register, to reproduce the original in full color.

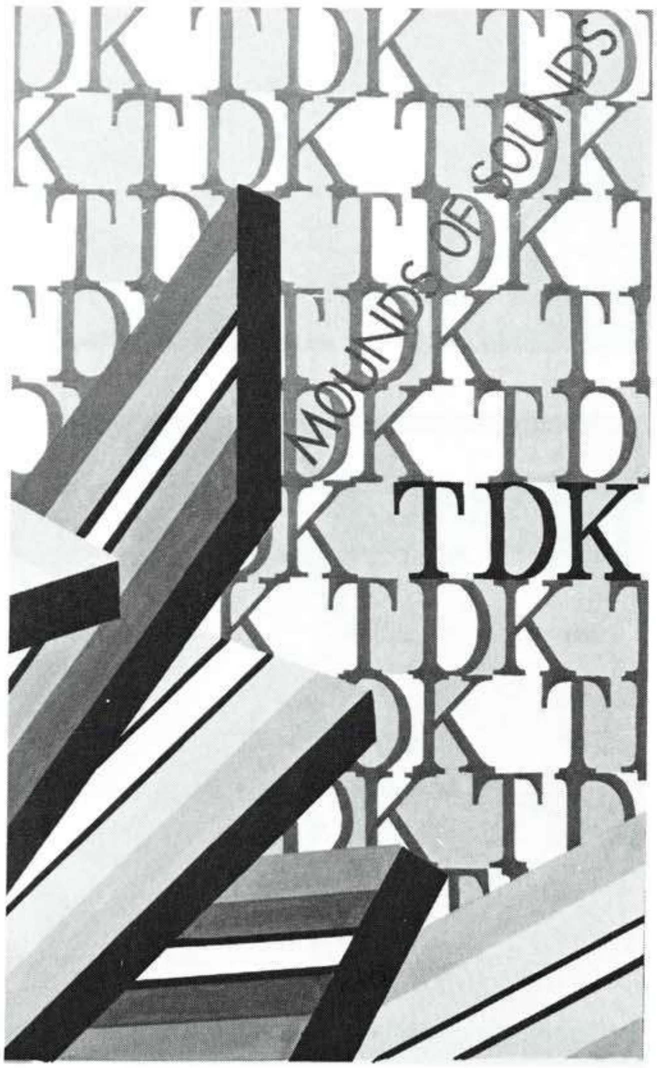
Demonstrate and Discuss —

- A simple layout for a black and white advertisement with one color; show how the addition of color can improve a design.
- How to prepare color separations for the camera.
- The importance of register when preparing camera-ready art.
- Three basic color plates that are used in realistic color printing (these can be secured from a printing plant).

Suggested Student Activities

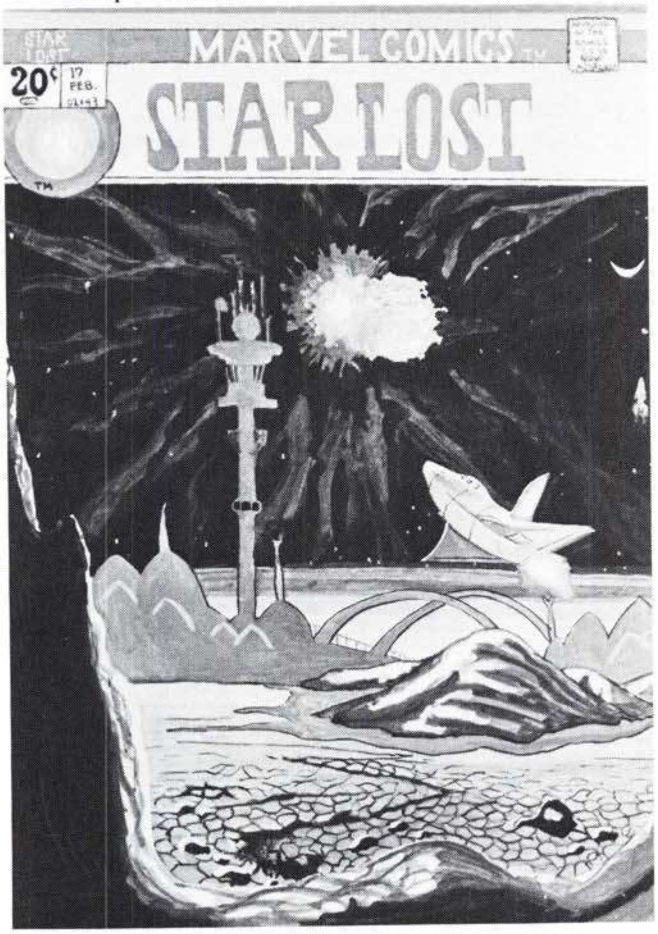
The student might

- Do a simple layout in black, white, and one color, then prepare " camera ready " mechanicals for each color.
- Design and print a three-color design to be reproduced with the silk screen process. Print with transparent inks, having some colors overlap to produce additional colors.
- Design a magazine advertisement for aftershave, cologne, or perfume using color to emphasize the masculine or feminine quality of the product.
- Design three illustrations for a novel using black, white, and one color. Select a color that will establish the mood of the illustration.
- Design a three-color logo for a national company.



Additional Project Categories

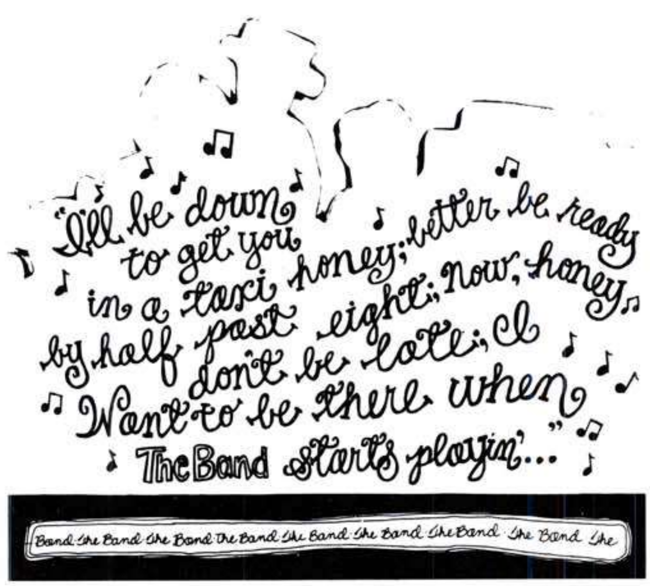
- Design and illustration: children's books
- Advertising: newspaper ad, magazine ad, poster, bumper sticker



- Editorial art: magazine cover, book jacket, paperback cover
- Sales promotion:
  - — postage stamp, calendar, record album, package design, brochure, business card
  - — TV advertisement: story board presentation — eight frames, copy, directions for major action, camera positions
  - — TV title or spot announcement — one to three frames
- Corporate image campaign: could include designs for poster, button, bumper sticker, matchbook cover, newspaper or magazine advertisement, shopping bag, etc.

Evaluation

- Has the student gained an appreciation of the need for good design and discriminating taste in advertising?
- Is the student aware of the impact of the media on the consumer and the viewing public?
- Has the student demonstrated a skillful use of tools and materials in layout and art for reproduction?
- Does the student's finished work reflect creative thinking?
- Has the student shown proficiency in using a variety of drawing and shading techniques used in advertising?
- Does the student's work reflect an understanding of the process of reproducing art in black, white, and color?



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Graves, Maitland. *The Art of Color and Design*. Second Edition. A plan of study: (1) Elements of design; (2) Principles of design, form of elementary relation, contrast, direction, texture, proportion, etc.; (3) Analysis of design elements. New York: McGraw-Hill, 1951.

Gray, Milner and Donald Armstrong. *Lettering for Architects and Designers*. New York: Reinhold, 1962.

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Jacobsen, Egbert. *Trademark Design*. Chicago: Paul Theobald, 1952.

Kepes, Gyorgy et al. *Graphic Forms: The Arts as Related to the Book*. Cambridge: Harvard University Press, 1949.

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Nerdinger, Eugen and Lisa Beck. *Alphabets for Graphic Designers and Architects*. New York: Reinhold, 1965.

Panofsky, Erwin. *Meaning and the Visual Arts*. Garden City, New York: Doubleday, 1955.

Pye, David. *The Nature of Design*. New York: Reinhold Art Paperback, 1964.

Reed, Walt. *The Illustrator in America 1900-1960*. New York: Reinhold, 1963.

Rosen, Ben. *Type and Typography*. New York: Reinhold, 1963.

PERIODICALS

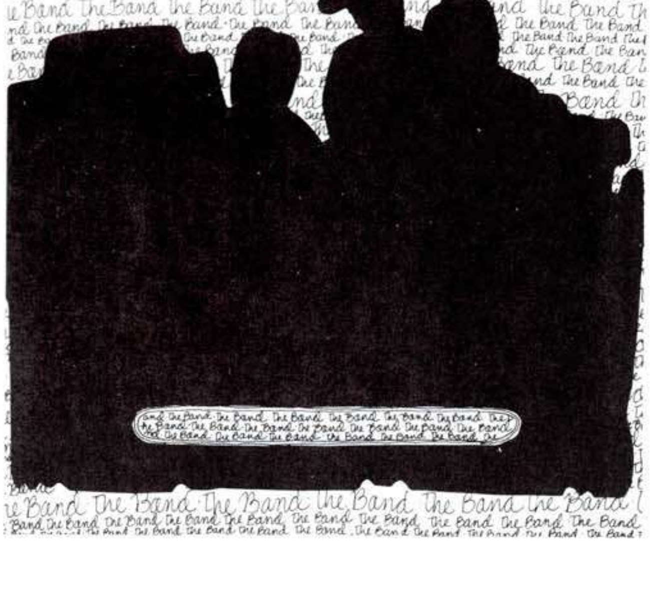
Art Directions, Advertising Trade Publications. 19 W. 44th St., New York, N.Y. 10036. Bimonthly, $11 per year.

Design News, Rogers Publishing Co. (subsidiary of Cahners Publishing Co:, Inc.), 3375 South Bannock, Englewood, Colorado. Bimonthly, free.

Graphis, published in Switzerland (on international advertising art). Available through *Museum Books*, 48 E. 43d Street, New York 10017. Bimonthly, $36 per year.

Print Magazine, 6400 Goldsboro Road, N.W., Washington, D.C. 20034. Bimonthly, $18 per year.

Visual Communication. Davis Publications. Worcester, Mass.







STUDIO IN FASHION DESIGN AND ILLUSTRATION

COURSE DESCRIPTION

This is an advanced course to be elected after a student has completed a full year of *Studio in Art*. It is designed to develop in students the knowledge and understanding of the esthetic principles and skills involved in fashion design and fashion illustration.

SCOPE

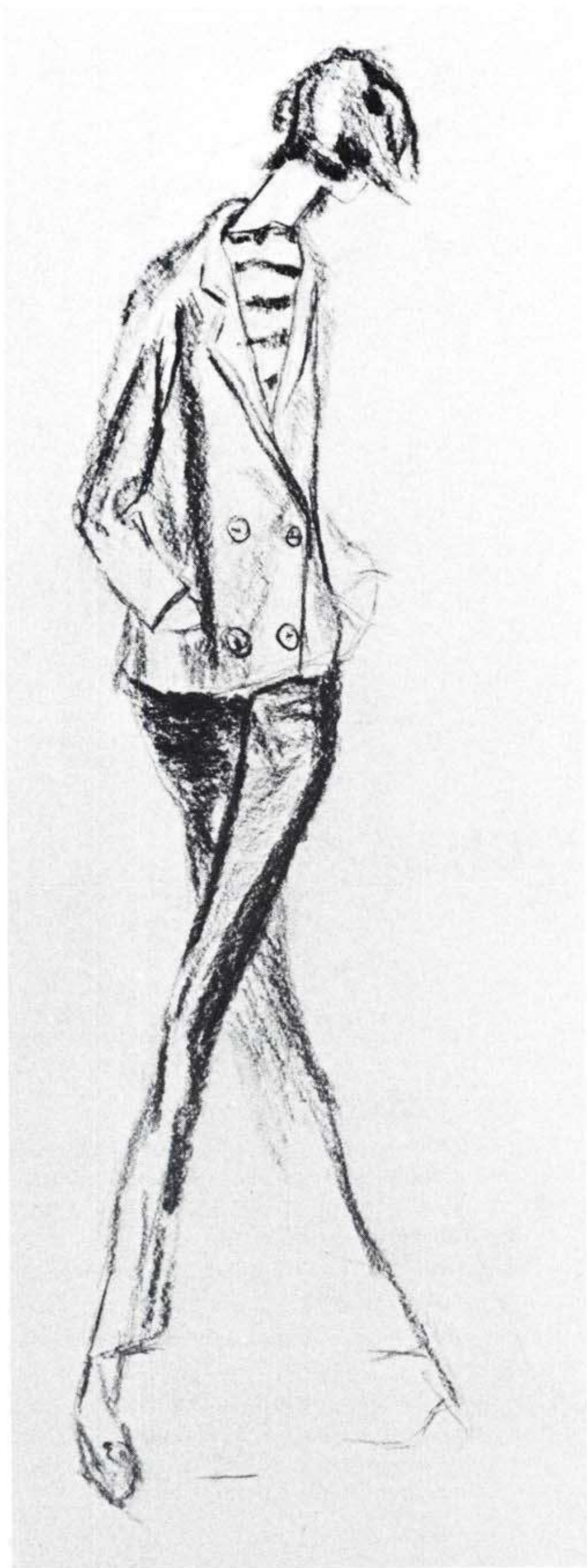
The course covers the development of fashion design and fashion illustration, its function of enhancing the figure, and the processes involved in designing garments and preparing fashion illustrations for reproduction. Experiences similar to those found in fashion design studios and fashion advertising studios should be simulated in the classroom.

Students should keep a notebook to record material developed in the Demonstration and Discussion sessions as well as a sketchbook for ideas and preliminary drawings.

STUDENT OBJECTIVES

Upon satisfactory completion of unique segments of this course of study, a student should be able to demonstrate:

- Basic principles of good design
- An improved understanding of the garment industry
- A more discriminating personal taste
- Creativity in the preparation and execution of fashion designs
- Practical application of original ideas
- An aroused awareness of the influence of basic social trends; economic, moral, and political, upon the history and future of fashion design



INTRODUCTION TO FASHION DESIGN

Fashion design is a reflection of its own time. Trends in this field change rapidly. Factors that affect fashion design are climate, age, changes in human physique, technological advances in fabric manufacture, popular appeal in sports, music, art and entertainment, foreign influences, public personalities in the news, and the inspiration of fashion designers. Changes in fashion trends are usually initiated in a few large cities throughout the world, notably Paris, London, New York, Rome, and Los Angeles.

Internationally, there is a fashion world that determines what is "in" and what is "out." It is a world generally focused on youth and on current trends, and on projected trends in living. Any of the magazines that focus on the world of fashion, such as *Vogue*, *Glamour*, and *Harper's Bazaar*, or newspapers such as *The New York Times* and *Women's Wear Daily*, will give an indication of popular fashion trends.

The world of fashion is vast and complicated. Most newspapers have a fashion section and large papers also have a fashion editor. Many periodicals are devoted to fashion design, and millions of dollars are spent each year by designers and manufacturers in creating and promoting new designs and influencing public taste. The work of the artist-designer is vital in the realization of these goals from the initial visualization to the consumer's final acceptance of the product.

Historical Background

Through the ages, costume has always been influenced by contemporary conditions—religious, social, cultural, economic, and political. According to most sources, dress originated for two purposes: protection from the elements, and to express individuality. Even before the actual use of clothing, it is known that the primitive hunter decorated his body by painting, cutting, or tattooing his skin. Eventually, the facial and body ornamentation gave way to personal adornment through the use of primitive jewelry, such as polished stones, necklaces of bones, and trophies of war.

The discovery of the arts of weaving cloth, dyeing, tanning hides, and working with metal encouraged the development of individuality in dress.

The dress of ancient civilizations as in Egypt, Greece, Rome, Africa, and the Orient, have been revealed through drawings, paintings, sculptures, and hieroglyphics.

Since early in the 16th century, France has led the western world in fashion and fashion design. Even in colonial America the more wealthy matrons sent to France for their fashion creations. Some fashions have also originated in England, especially those related to the use of British woolen materials.

During the 1920's and 1930's, American designs drew attention, especially in the area of casual and sports attire. After World War II, Italian designers also came into greater prominence, competing with the fashion centers of France, England, and the United States.

Discuss —

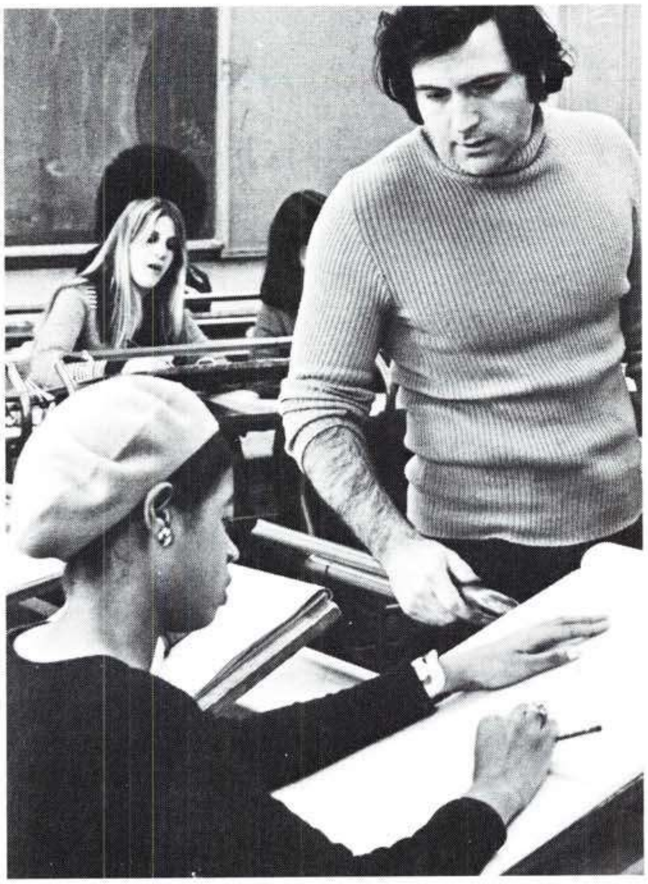
- Important contributions of past civilizations and cultures to the world of clothing.
- The effect on fashion design of world events such as the styles in France immediately before and after the French Revolution, or the popular interest in articles found in the tomb of Tutankhamen in Egypt in 1922.
- The influence of various textiles on the fashion world, including importance of the industrial revolution, and the development of synthetics, wash and wear fabrics, double knits, fake furs, vinyls, etc.

Independent Research Projects

- Do individual research regarding the ways fashion has been affected by people in the news, by religion, climate, economics, the theater, music, art, developments in foreign countries, or increased leisure time.
- Study socio-economic developments such as the women's liberation movement; fashion awareness of ethnic groups; changing lifestyles; the invention of synthetic fibers; new sewing machine techniques; and the awareness of natural resources with the development of fake furs as an alternative to sacrificing animals for their pelts.

Discuss —

- The term "manikin" as applied to fashion figure drawing; simplicity of construction, and the feeling of solidity achieved through the use of cylindrical forms.
- Blackboard illustration of the sequence and thinking that goes into the construction of a manikin figure. (In the introductory phases of this course, the figure proportions should follow the measurements of the "average" figure.)
- The human figure as recorded by famous artists through history whose work shows distinct styles. (Color slides or illustrations supplemented with chalkboard sketches might help to clarify and emphasize salient points.)
- Examples of manikins in various poses. Stress the plausibility of the pose. Point out the line of gravity, weight thrust, direction of the shoulders, turn of the head, and position and direction of the feet.
- The techniques of sketching and rendering used by fashion illustrators as exemplified in current fashion and trade magazines. Point out the basic approaches: to capture excitement through movement in the gesture of the pose; the finished sketch; contour drawing; the modeled rendering; the flat rendering; and wash rendering.
- The importance of understanding the figure and how it moves. (Sketched diagrams should be used to show movement of the entire figure.)



Studio Experiences

Drawing from live student models is probably one of the most important activities of a drawing class. Individuality of style should not be identified and nurtured, as it is inhibiting to encourage students to be stylized and slick when they are in the early stage of learning. Exposure should be general, stressing drawing the figure from life and developing coordination and a good eye. This only comes through constant practice in life drawing.

It is hoped that through the following activities the student will develop a love and taste for line drawing.

The student might

- Sketch a number of figure poses using charcoal, black chalk, or conté crayon on newsprint. Emphasize proportions and the movable parts of the figure; i.e., elbow, knee, shoulder, neck, ankle.
- Draw a series of short successive poses from the live model, some as short as one minute. Work quickly and freely. Details should be eliminated. The spirit or feeling of the pose is most important.
- Draw a manikin figure, using a live model to suggest the pose. Do a series of such drawings from different angles. Draw both seated and standing figures. Avoid elongation and redesigning of the figure—this is best left to the accomplished artist and should not be attempted until the student is proficient.
- Draw a series of sketches shaded with charcoal to emphasize a three-dimensional effect, producing a more lifelike quality. Detail and careful shading should be avoided in favor of a bold yet simple rendering. The overall effect should be one of solidity and mass.
- Use brush and black paint or ink to sketch the model, emphasizing a variety of lines.
- Draw a series of sketches from the model using a variety and combination of media: pen and ink,

tempera with brush, black line on wet paper using pen and brush.

- Make a series of drawings which will point out the difference between the flat decorative figure and the modeled figure. Follow up with a series of contour drawings from live models.
- Use gray charcoal to draw a model posed under a spotlight. Use a kneaded eraser to produce the highlights. Avoid extensive use of line; use line as accent only.

Independent Studio Projects

Select and mix materials and media, using them in an original manner for these projects.

- Draw a series of hand diagrams, using planes to define the back of the hand and the sides and tops of the fingers and thumb.
- Using a carefully rendered, pencil drawing of a skeletal hand as a guide, draw hands on a tissue overlay indicating the position of the joints in each finger. Sketch a series of hand positions that point up the placement and relationship of the joints.
- Advance to poses of hands holding objects such as a purse, gloves, or an umbrella. Draw one hand clasping another. Use ideas from fashion magazines, but draw from life. Render in color and in gray washes and line.
- Draw a modeled form of the head, using facial planes. Render in flat color, using shades of gray to determine the change of direction of each plane. Repeat for a round face; a long, thin face; and a heart-shaped face.

Applying the Elements and Principles of Design to Fashion

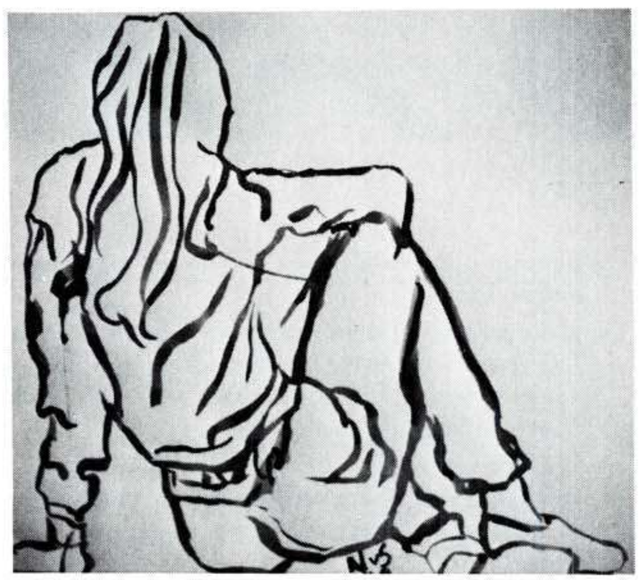
The elements and principles of design provide the underlying basis for fashion design and illustration, as for all areas of the visual arts. The elements of design (line, form, space, color, value, and texture) are presented in the foundation course, *Studio in Art*. These should be reviewed at the beginning of this course for the *elements* of design are components out of which the visual arts are created. The *laws* or *principles* of design are in essence the blueprints that govern the way these elements may be put together to create a harmoniously pleasing art form or functional design such as a garment. While there may be some argument as to the precise listing of these principles, most artists, designers, and art educators tend to agree that the following terms represent the principles of design: balance, rhythm and repetition, dominance and subordination, and proportion.

The next section is focused upon the application of specific elements of design to fashion design and fashion illustration. As these elements are introduced in demonstrations, discussions, and student activities, there should be constant recognition and application of the principles of design.

Line

Discuss and Demonstrate —

- Line as a directional force, an accent force, and a psychological force in the creation of design.
- The use of line as a structural expression, as a decorative expression, as a means of accent, and as a means of achieving certain desired effects.
- The psychology of line—the rigid vertical and horizontal, the rhythmic, the contour or surrounding line. Use illustrations to indicate the effect of line in fashion design and illustration. Discuss its importance in fabric draping for various figure types.
- The contemporary silhouettes of current fashion magazines and newspapers as compared to those of past years.
- The use of line by current fashion illustrators.
- Line in relation to mass and color.
- Idealization, by combining a figure type with a face type. Design a complete ensemble, including hairstyle and accessories that are current and in good taste. Some time could be given to study of cosmetics and hair grooming. Finished work should be in color using any medium.
- The design of a skirt for a tall, thin figure.



Value

Demonstration and Discussion

- Using color cards, show what is meant by value, and the changes that occur when reducing color to black and white.
- Demonstrate the use of value differences for purposes of contrast and decoration; the psychology of value and its implications in the field of fashion.
- Give examples of the use of value illustrations in advertising fashion designs in newspapers and magazines, and the use of line against value masses.
- By placing a sheet of tracing paper over line drawings of fashion figures, show the application of broad value washes using diluted black india ink or lightened tones of lamp black in broad brush strokes. Conté crayon or charcoal may also be used for this purpose.
- Display samples of value combinations used in textile design and fashion display.
- Using a female student as a model, focus a strong spotlight on her. Make a large charcoal value sketch, illustrating use of value masses. In a darkened room, the overhead projector may be used.

Studio Experiences

- Make a series of flat wash values and wash gradations from very dark to very light in both transparent and opaque black-and-white watercolors.
- Experiment with freely drawn line patterns over flat and graded washes. Create textile designs based on these experiments.
- On lightly drawn figure and costume studies in pencil on watercolor paper, place values of transparent watercolor washes or diluted black india ink. When finished, erase the pencil lines to see if the wash renderings "hold up." Experiment with implied or suggested line rather than actual line.

Color

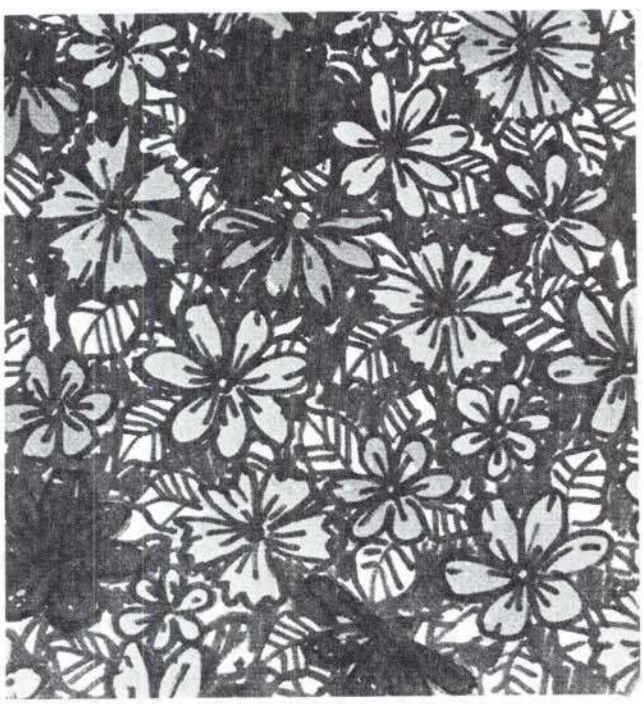
Discuss and Demonstrate—

- The use of warm and cool colors, and the psychology of color and its importance in fashion designing.
- The role of color in setting style trends.
- Examples of interesting color combinations in textile design. Show examples of textile designs from the work of Picasso, Matisse, and other artists.
- The effects of lighting on color and values, including daylight, tungsten light, fluorescent light, and display lighting in various colors and color combinations.
- Review color as presented in *Studio in Art*.

Studio Experiences

The student might

- Starting with primary colors, mix a series of color swatches. Experiment with varying amounts of color in the mixture. Include black and white in additional mixtures. Make a series of color and value charts from the mixtures obtained. Make notations where necessary and place the page in the notebook.
- Using three neutral colors and one accent color, design accessories such as shoes, gloves, hat, scarf, belt, and handbag.
- Using a monochromatic color scheme, design a sports outfit consisting of a skirt or pants, blouse, sweater, vest or jacket, and shoes or boots.
- Design a beach ensemble, using a color scheme appropriate for a warm climate.
- On a small area, design a textile print in tempera or watercolor. Use highly contrasting colors to achieve a bold effect. Indicate the type of fabric. Do another one, using a more subtle effect.
- Design a print based on a floral shape. Use collage technique. Indicate type of fabric.
- Using tinted paper and colored chalks, design several plaids.
- Use one plaid in a dress design employing the same media.
- Select and complete one or more of the fashion illustration projects listed in the Advertising Design section of this publication.



Independent Studio and Research Projects

The student might

- Using fashion magazine ads, identify "accent" color, neutral colors, warm and cool colors, warm and cool grays, and monochromatics.
- Design an ensemble for a winter sport, using a color scheme suitable for a cold climate. Render these in watercolor or tempera in any chosen rendering technique.
- Indicate, with quick sketches in color, what colors are worn best by a very tall, thin figure. Do the same for a short, heavy figure. Plan color schemes around the blonde, fair-skinned type and the brunette, dark-skinned type. Use paper of a size suitable for your notebook.
- Using one of the textiles designed in class, develop an appropriate ensemble for a live model. Include accessories.

Space, Shape, and Form

Since these elements are very closely interrelated, they have been grouped under a single heading to facilitate instruction. An understanding of the fundamental differences between the elements should be brought out. The teacher should again refer to these elements which have been given emphasis in *Studio in Art*.

Demonstration and Discussion

- Emphasize important differences between positive and negative shapes and their uses.
- Show examples of dramatic use of space.
- Discuss the use of space and shape to enhance the human figure in fashion.
- Using slides, opaque projector, or overhead projector, show silhouettes of fashion figures interspersed with abstract shapes. Discuss beauty of shape, form, and space.
- Using large fashion advertisements from newspapers, show the basic shapes and shape relationships by blacking the masses in the advertisement with brush and ink, charcoal, or carpenter's pencil. Make a large block from areas of copy, type, and figures. Discuss the interrelationships of shapes and space.

Studio Experiences

The student might

- Using black and white paper, cut out a variety of geometric shapes. Place them on a large sheet of gray paper and arrange them in a well-designed composition. Paste them down.
- Using whatever resources that may be available, such as books, figure plates, or slides, draw copies of a number of period costume silhouettes. Follow this with the creation of similar silhouettes using contemporary figure styles. Cut out the silhouettes and arrange them on a piece of contrasting paper, stressing similarities of different periods, thus illustrating how the history of costume influences current fashion trends.
- Thinking in terms of the figure silhouette, cut and paste several shapes that would represent the fashion figure in action. A few lines might be added for emphasis. Using the broad side of a piece of chalk or crayon, work out several fashion designs stressing the clothed figure as a mass.

Texture

Demonstration and Discussion

- Display a number of artist's renderings that employ a variety of techniques to illustrate textural qualities of fabrics. Students might attempt to name or describe each fabric sample. Supplement this with models dressed in ensembles made from these fabric types.
- Demonstrate draping of various materials, using a student as a model.

Studio Experiences

The student might

- Drape fabric on the model, using a spotlight to highlight the folds. Render the material in chalk. Repeat this, using different types of fabric.
- Sketch a model posed in ensembles made from several different fabrics. Complete each in a different medium, e.g., tempera, watercolor, colored inks, and charcoal while attempting to capture the characteristics of the various textures.

- In a similar manner, render furs and fake furs. Follow with a rendering of a model carrying a fur coat or jacket over her arm. The rendering should give the feeling of the weight, folds, and texture of fur. Use a spotlight for each pose. Rendering might be in chalk or watercolor.
- Using gray wash, do several renderings of jewelry, scarves, hats, shoes, and handbags.
- Using black, gray, and white tempera or watercolor, paint swatches to simulate gray tweed, chiffon, lace, etc.

Independent Studio and Research Projects

The student might

- Place sheets of tracing paper over several black-and-white photographs of hands and faces and trace the facial planes in diagrammatic style. Use photographs from a fashion magazine and insert the tracings in a notebook.
- Develop a folder containing swatches of various materials that might be used in fashion design. Mount and identify swatches with name, content of cloth, approximate retail cost per yard, and principal uses.
- Using red as a color, paint swatches suggesting a velvet, taffeta, and a satin finish.

Fashion in Advertising

Demonstration and Discussion

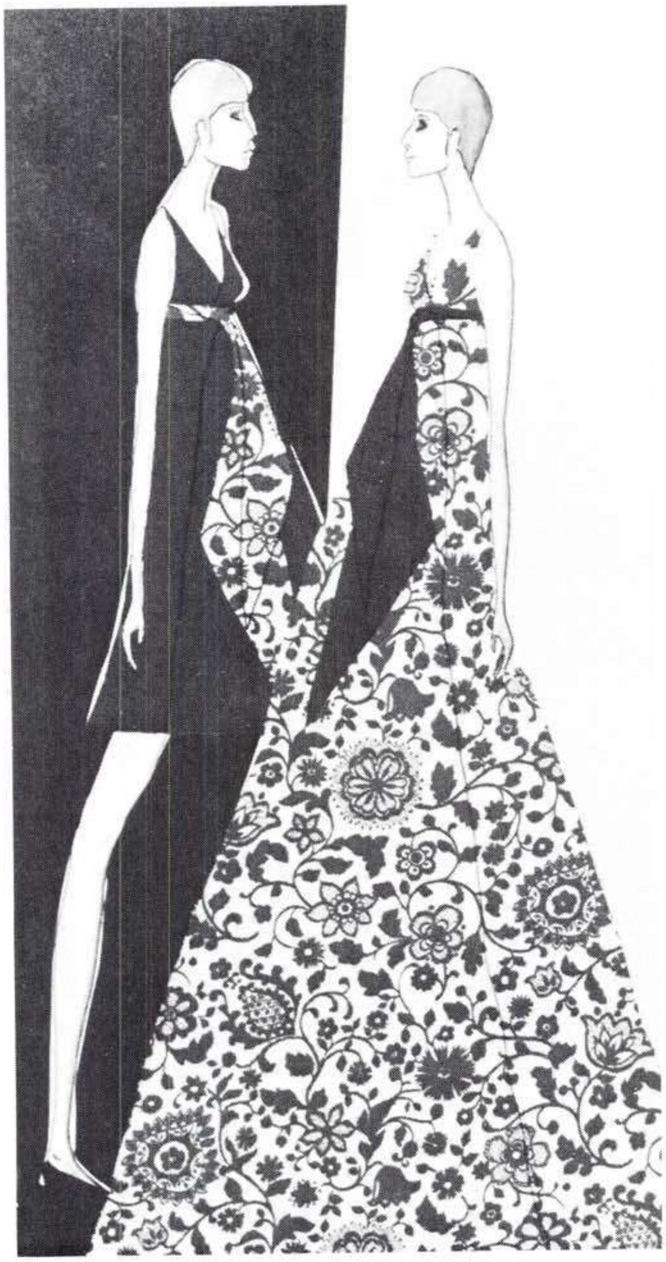
- Using projected illustrations of page layouts brought in by the students, discuss the principles of design in the effective use of color, line, and mass. Examples should include black-and-white illustrations as well as color. Describe and discuss double-page advertisements, single-page advertisements, half-page advertisements, the heavy copy advertisement, the "white advertisement" (economy of line and mass, leaving much of the page unused), and the symmetrical and asymmetrical composition.
- Demonstrate and discuss the changing scene in the retail field: the wide appearance of discount houses, the copying of expensive "foreign custom creations," the new synthetic materials, the wash and wear materials, the mail order catalog houses, the "styles for all ages," etc.
- Discuss and illustrate the recurring themes to be found in "modern" or "futuristic" dress. Note adaptations from the historical, such as Egyptian, Roman, Greek, early 20th century, or African and oriental dress.

- Visit several department stores and observe the window and counter displays. Note the use of one unifying theme commonly employed during holiday time and change of season. Make comparisons between the department store, which aims for high volume of sales, and the specialty shop, which caters to a clientele desiring sophisticated styling and willing to pay higher prices. Make notes and croquis sketches in a notebook or croquis book.

Studio Experiences

The student might

- Using a layout pencil and large sheets of tracing paper, create several layouts for a full-page fashion advertisement. Concentrate on the placement of the shapes created by blocks of type, figures, and other elements.



- Develop a layout that includes a figure, a caption, a block of copy, and a suggested background. Render in tempera paint. Lampblack and water, used as a wash, might be substituted for tempera. White should be used only to mask out unwanted areas, not for mixing.
- Using a cardboard box and various kinds of found materials (cloth, buttons, toys, bits of wood, and plastic), create a simulated window display of fashion items.
- On tracing paper, design a full-page layout using a group of figures. Create negative areas by the juxtaposition of the figures. Complete one copy in black, white, and grays. Using this as a guide for value, try the same group in color, attempting to match in values the black, gray, and white study.
- Experiment with paper sculpture as it might be applied to fashion advertising.
- Design a three-dimensional counter display. Make a small working model using cardboard and any other materials such as cord, wire, or burlap. The unit is to be functional, self-supporting, eye catching, and tastefully done.
- Plan a poster advertising a fashion show, with emphasis on negative space and color to achieve a special effect. The copy should be limited and the effect should be exciting. Make thumbnail sketches and develop the best one on a large sheet of Bristol board or similar paper. Use a variety of materials, such as fashion photographs from magazines, sections torn from newspapers or magazines, newspaper copy, construction paper, cutout letters, and india ink or black paint.

Independent Studio Projects

- Working around a theme, do a number of thumbnail sketches of a window display for a women's boutique or specialty shop. Consider a maximum of three manikins, and create appeal through the quality rather than the quantity of ideas in a simple, catching display.
- If there is a students' store in the school, plan the actual dressing of a window and work out the theme. The fashion design students may dress the manikins with original garments and the art and design students may design and construct the interior.
- Plan and execute an informational bulletin board display. The theme might deal with historical costume design. Within this framework, the students should plan the kind of materials to be used and the method of display.

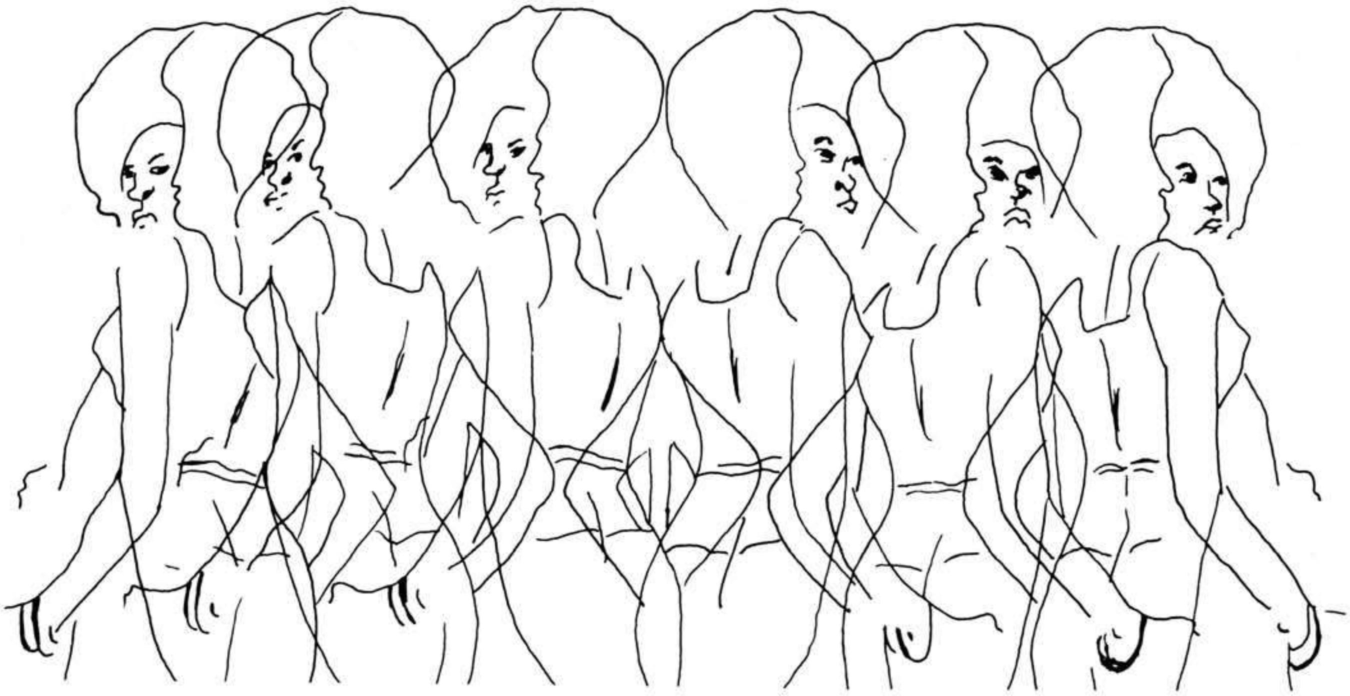
Independent Studio and Research Projects

This section lists additional examples of independent projects that might be used within the course, or as a basis for an advanced course in Fashion Design and Illustration.

The student might

- Collect and mount pictures of the human figure in history that best illustrate the changing concept of beauty and fashion. Include the portrait and court painters of 18th and 19th century France, Spain, England, and America. Make notations of the differences to be observed. Include examples of Afro, Oriental, and American Indian styles.
- Select some top designers of today and compile illustrations of their styles. Pick out one designer and write a research paper about the inception and development of his or her career. Illustrate the report with line drawings and photographs.
- Keep a comprehensive file of distinctive techniques employed by fashion illustrators. Include all varieties and combinations of media, and interpretations of the fashion figure.
- Keep a separate file of fashion photographs from fashion periodicals.
- Use selected fashion illustrations from magazines to make several charts. Coordinate figure types with color, fabric, accessories, and hairstyle. Work each chart around a specific theme. Illustrate actual swatches of fabric (to size), mount illustration and original fabric on same paper. Try to match color.

- Reproduce an actual swatch of textured material from an original student design. Render in tempera on white paper. Repeat the ensemble or design by copying another swatch of fabric of contrasting weight and texture. Use tinted paper if desired.
- Design four outfits for a low budget. Use swatches of actual materials. Include a back view and working sketches showing the placement of darts, details in styling, and accessories. Research should include field trips in the shopping area, comparison shopping for prices and quality, and the use of a trade newspaper *(Women's Wear Daily)*.
- Plan a field trip to a manufacturer's factory. Observe the steps in making a garment, from the drawing board to the finished sample.
- Design costumes for a period play or show. Render them in tempera or watercolor. Accompany each sketch with fabric swatches of the actual materials, and wherever possible, any accessories used such as braid, cord, lace, and buttons.
- Using an original basic garment, render several variations through the use of accessories, jackets, vests, belts, scarves, jewelry, and removable sections.
- Throughout the year, collect materials that can be used in the course, such as collage material, color areas cut from magazines, fabric remnants, swatches, unusual buttons, buckles, and trim. Store in a shoebox or similar container.
- Using cut paper and fabric, design items for the teenager. Include a pantsuit, skirt, layered sweater outfit, and a ski or tennis outfit.
- Plan a display incorporating the work done by the class. Include drawings, renderings, collages, and shopping reports.
- Plan an advertising campaign for a fashion show, either imaginary or real, to be held in the community. Utilize mass media with an emphasis on the artist's function and point of view. Use posters, a window display in the school or in the community, bulletin boards, and radio and television coverage.
- Keep samples of creative lettering in the notebook. Include examples in such media as paint, ink, chalk, and charcoal.



Evaluation

- Does the student's artwork reflect an understanding of the elements of design?
- Does the student's sketchbook contain his own figure sketches, ideas, and designs?
- Has the student exhibited a desire to go beyond the classroom in his search for understanding the fashion world?
- Have conversations with the student indicated that he has a broad understanding of the factors involved in fashion trends?
- Has there been any obvious change in the garments worn by class members which might be attributed to their fashion study?

SUGGESTED READING

The following list of books, periodicals, and associations should prove helpful to both the student and the teacher. Many of the associations also publish career opportunity materials.

Bender, Marylin. *The Beautiful People*. New York: Cowan-McCann, 1967.

Craig, Hazel T. *Clothing: A Comprehensive Study*. Philadelphia: J. B. Lippincott Co., 1968.

D'Assailly, Gisele. *Ages of Elegance: Five Thousand Years of Fashion and Frivolity*. Pittsburgh: Graphic Arts. Tech. Foundation, 1968.

Daves, Jessica. *Ready-Made Miracle: the American Story of Fashion for the Millions*. New York: G. P. Putnam, Sons, 1967.

Dilley, Romilda. *Fundamental Fashion Drawing*. New York: Sterling Publishing Co., 1967.

Fernald, Mary. *Costume Design and Making*. New York: Theatre Arts Books, 1967.

Jarnow, Jeannette A. *Inside the Fashion Business*. New York: John Wiley & Sons, 1967.

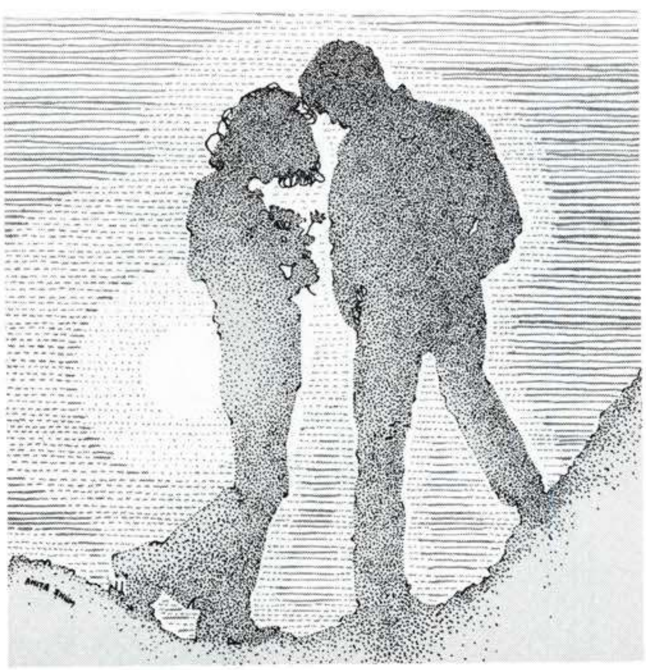
Kolodny, Rosalie. *Fashion Design for Moderns*. New York: Fairchild Publications, 1967.

Levin, Phyllis Lee. *The Wheels of Fashion*. New York: Doubleday & Co., 1965.

Sheldon, Martha. *Design Through Draping*. Minneapolis: Burgess Publishing Co., 1967.

Sloane, Eunice M. *Illustrating Fashion*. New York: Harper & Row Publishers, 1968.

Vecchio, Walter and Robert Riley. New York: *The Fashion Makers*. Crown Publishers, 1968.



PERIODICALS

Gentlemen's Quarterly. 1255 Portland Place, Boulder, Colo. Eight times a year.

Glamour. Conde Nast Publications Inc., 420 Lexington Ave., New York. $9 per year.

Harper's Bazaar. Hearst Corp., 717 Fifth Ave., New York. Monthly.

Ingenue. Dell Publishing Co., 750 Third Ave., New York. Monthly.

Mademoiselle. Conde Nast Publications Inc., 420 Lexington Ave., New York. Monthly, $9 per year.

Seventeen. Triangle Publications, Inc., 320 Park Ave., New York. Monthly.

Vogue. Conde Nast Publications, Inc., 420 Lexington Ave., New York, Monthly, $10 per year.

Women's Wear Daily. Fairchild Pub., 7 East Twelfth St., New York. Daily.

ASSOCIATIONS

Council of Fashion Designers of America, 32 E. 57th St., New York, N.Y.

Custom Tailors and Designers Association of America, 400 Madison Ave., New York, N.Y.

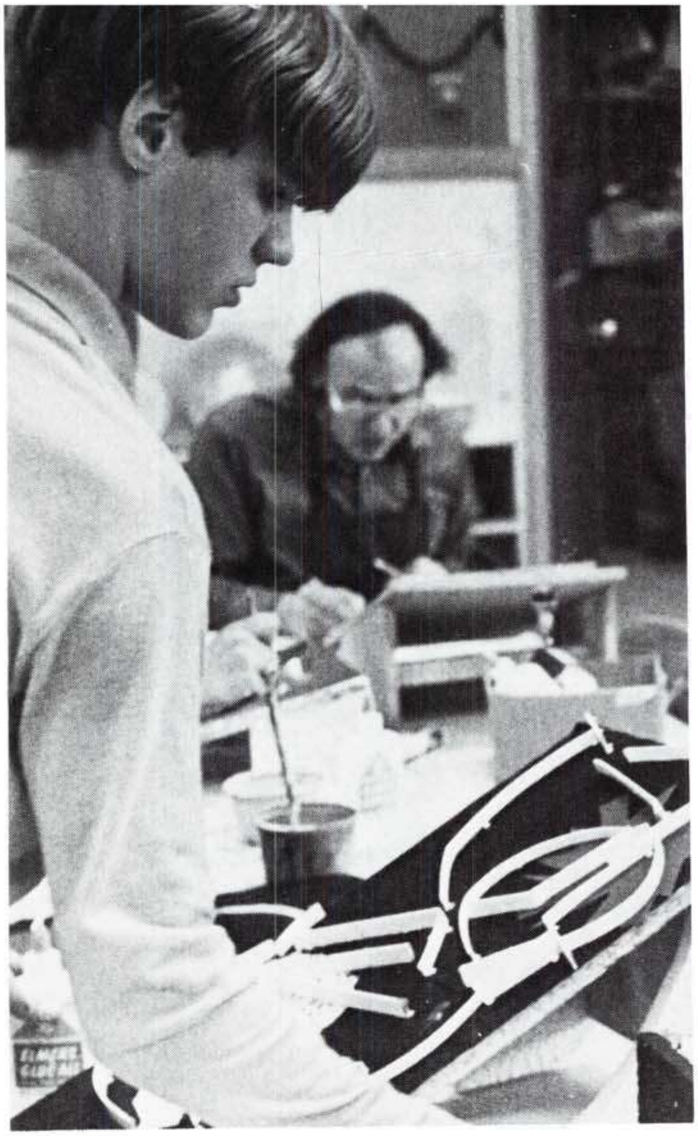
Educational Foundation for the Fashion Industries, 227 West 27th St., Philadelphia, Pa.

Fashion Group, 9 Rockefeller Plaza, New York, N.Y.

International Association of Clothing Designers, 12 South St., Philadelphia, Pa.

New York Couture Business Council, 141 W. 41st St., New York, N.Y.

New York Couture Group, 141 W. 41st St., New York, N.Y.




SUN
RAY
MOON
LIGHT
TIME
SPARTAN


NAILS
ONE POUND
WILMOD CO.
NAILS
ONE POUND · COMMOND
1 lb
6 PENNY
NAILS
golf balls
SPALDING
UNI-CORE

STUDIO IN PRODUCT DESIGN

COURSE DESCRIPTION

This is an advanced course to be elected after a student has completed a year of *Studio in Art*. It should develop in students the knowledge and understanding of the esthetic principles and skills involved in product design. Since much of this course includes the use of mechanical and technical drawing, it is strongly suggested that the student take the foundation course in mechanical drawing as a parallel or prerequisite course.

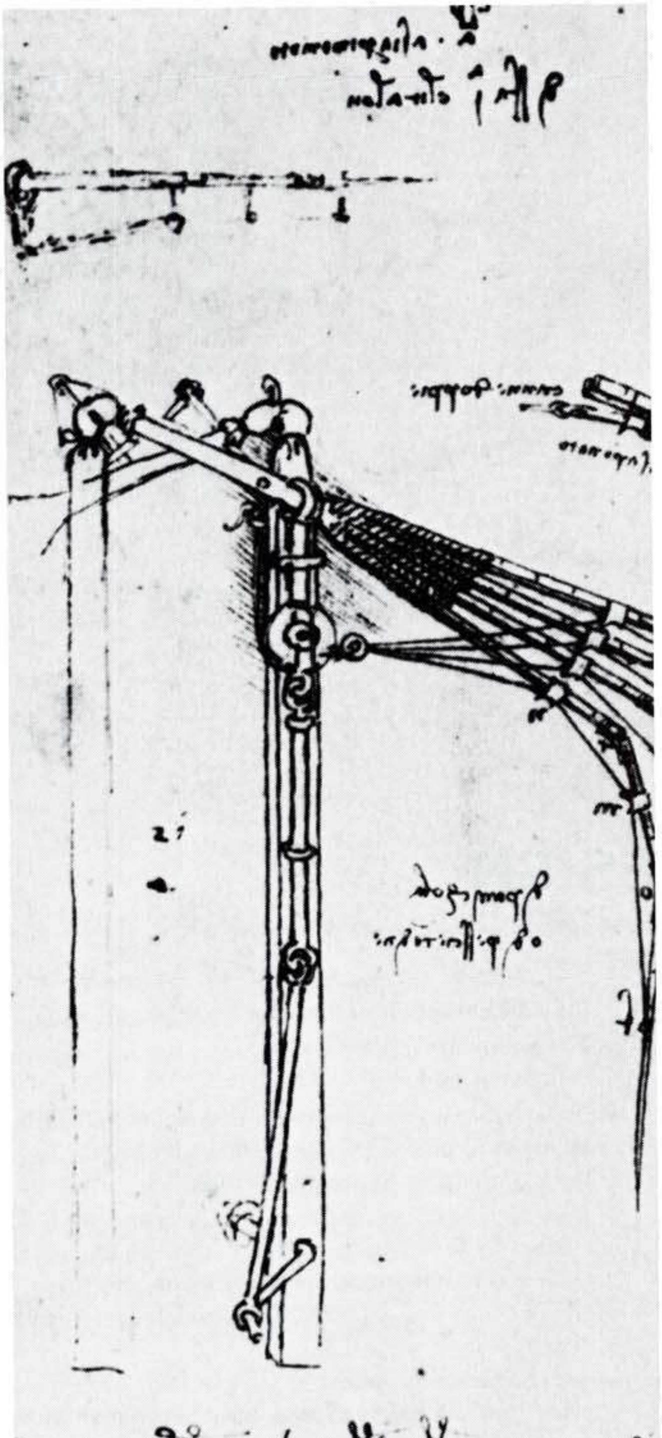
SCOPE

The course covers a brief development of product design and its function and presents some of the problems and processes involved. Experiences similar to those found in design studios should be simulated in the classroom.

STUDENT OBJECTIVES

Upon satisfactory completion of unique segments of this course of study, a student should be able to demonstrate:

- The importance of creative thinking in the designing and execution of consumer products
- The ability to evaluate esthetic qualities in designed consumer products
- An awareness of the esthetic principles and skills involved in product design and the ability to apply these principles in creative efforts
- Increased skills gained from research and study of current trends in product design, through the use of periodicals, newspapers, catalog items, and professional books and journals, and through observation of products
- An obligation to produce designs that are appropriate and useful, and that have the potential of giving pleasure to the user
- Mastery of essential techniques and skillful use of tools and materials, plus an individual approach to ideas that involve techniques, media, and tools
- Awareness of the historical perspectives of product design, in order to better understand the state of the art as a basis for creating new design trends and in making products more beautiful and more functional.



DESIGN OF WING for a spring-operated flying machine. Leonardo da Vinci (1452–1519).

INTRODUCTION TO PRODUCT DESIGN

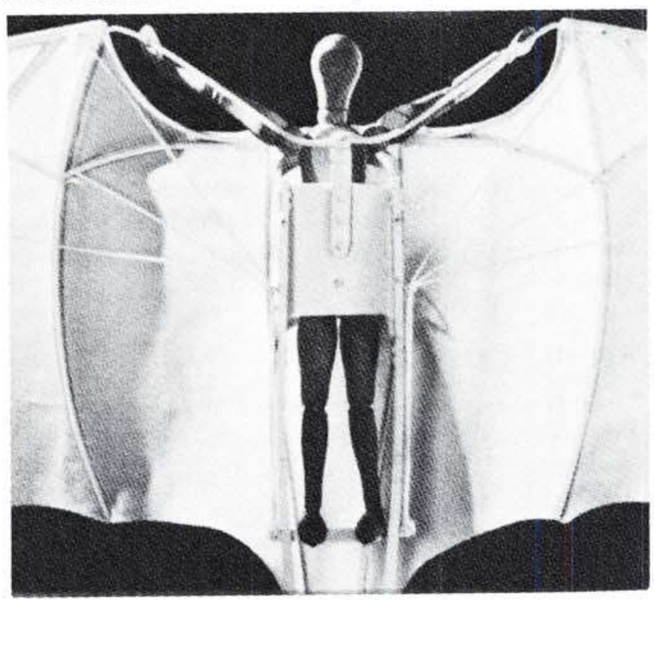
The following concepts are to be developed through discussion and demonstration:

Product design (often referred to as industrial design) is the name given to the field of art that is concerned with applying the principles of esthetic design to consumer products of industry. The designing of objects for mass production is an integration of engineering, art, and merchandising. This vast and complex field concerns the design and packaging of such diverse items as appliances, toys, office machines, tableware, automobiles, furniture, photographic equipment, electronic devices, and boats. In each of these items the designer is concerned with function, appearance, and simplicity, as well as materials and manufacturing processes.

The product designer actually replicates the work style of the Renaissance artist, in that often he must be an artist, architect, and an inventor. He must have knowledge of engineering, material strengths, material fabrication, production, merchandising, methods of reproduction, space relationships, layout, color, typography, and drafting. His finished product should be in harmony with manufacturing processes and materials, and should take advantage of machine capabilities and precision.

In recent years there has been a great increase in products designed to create new needs as well as to satisfy those that actually exist. This, of course, develops *built-in obsolescence*, to keep sales high. This is obvious in the automotive, appliance, and home furnishing fields.

FLYING MACHINE Leonardo da Vinci (1452–1519), Model by International Business Machines Corporation, Armonk, New York.



Function in Nature

All forms of nature are specifically suited for their purpose. Each species possesses a certain form, structure, texture, size, and coloration. If a form of life failed to possess these specific qualities, it probably would not survive. In some living creatures, such as the grouse or the hare, the coloration is modified with the changing seasons. Natural camouflage enables the bird or animal to blend into its environment for protection. An endless variety of adaptations to environmental conditions are evident in nature.

Manmade shapes can also prove functional when their intended purpose is completely realized, but not all manmade objects can actually be considered works of art. Many products are merely utilitarian and functional. Ceramic products are made for roofing and as soil pipes. These products serve their purposes effectively, but would not usually be categorized as creative works. It is through the potter as a craftsman, experimenter, and designer, and the mark he leaves upon the work, that ceramics become an art form.

Historical Background of Product Design

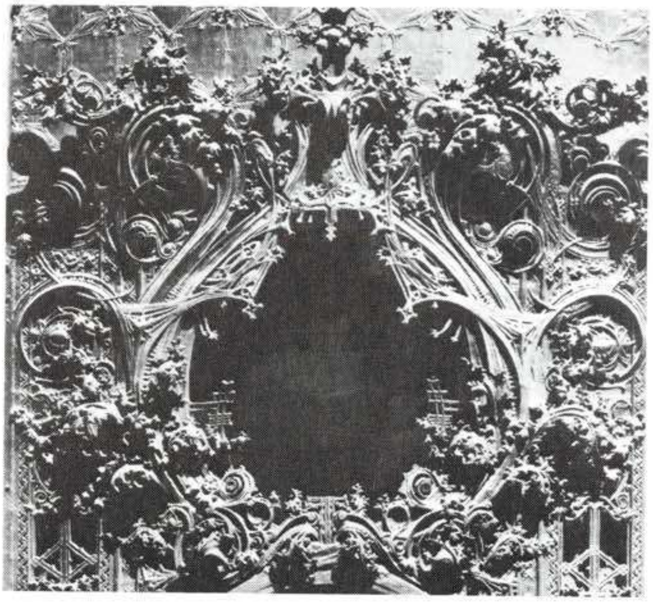
An important cause of the change from handcrafts to design for mass production was the industrial revolution. The advent of power machinery and the advances of technology threw vast numbers of craftsmen out of work. These craftsmen claimed that the machinery destroyed the individual and his ability to create things of beauty. At first, this proved to be true, for the industrialist produced all he could as cheaply as he could. In the early days, the low cost of production was perhaps the major advantage of mass processing.

After years of working with materials and traditions, the craftsman had become an expert designer, but it was the decision of the craftsman to oppose the machine instead of accepting it that actually left the machine without a master. Industry began to reproduce designs formerly found in hand-shaped wood or stone for functions for which wood or stone was previously used. Lost was the touch of the craftsman on individual pieces. Good design was not demanded by buyers. What had been good, built-in, three-dimensional design was replaced with mechanically applied surface ornamentation. Since any object could be cheaply covered with decorations in a few seconds, surface treatment soon became the symbol of art. In many cases, the ornamentation was merely used to disguise poor materials and poor workmanship.

In the 1920's, a new era of art and engineering began to emerge. The artist began to accept the machine as a tool, and machine production began to depend upon the designer for his styling and integrity. The Bauhaus School of Weimar, and later at Dessau, Germany, was based upon the important concept that there is beauty in any well-designed object. Concern began to focus on basic shape, materials, and structure rather than upon decoration. Various materials were actually handled by the artist until he fully understood the characteristics of each. Their experiments revealed potentialities never dreamed of before.

Gradually conditions in manufacturing changed. Industrialists discovered that quantity, quality, and

SCHLESINGER AND MAYER DEPARTMENT STORE (now CARSON, PIRIE, SCOTT) Louis Sullivan (1856–1924), 1899–1904; addition 1906. Detailed ornament over entrance. Chicago, Illinois.



SAUCEPAN AND LID W. Archibald Welden, designer, 1936. Stainless steel, copper; height 5½″. Revere Copper and Brass, Inc., Rome, New York.

economy are all important. Contemporary trends toward simplicity have actually been a reaction against the useless decorative embellishment and the imitative designs of the last century.

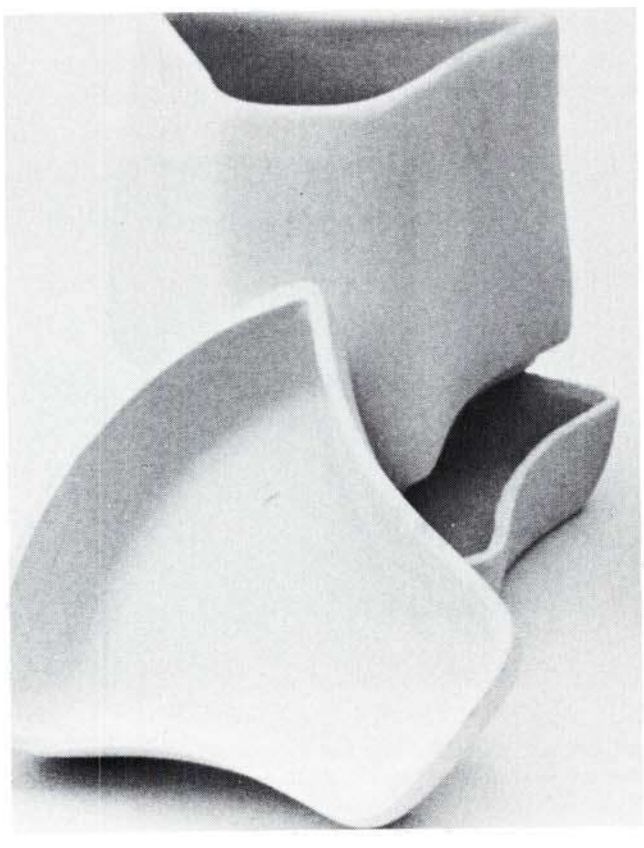
Humankind is greatly modified, controlled, and contained by the environment he creates. We must not only improve what we have, but also plan for what is needed in the future.

Role of the Designer

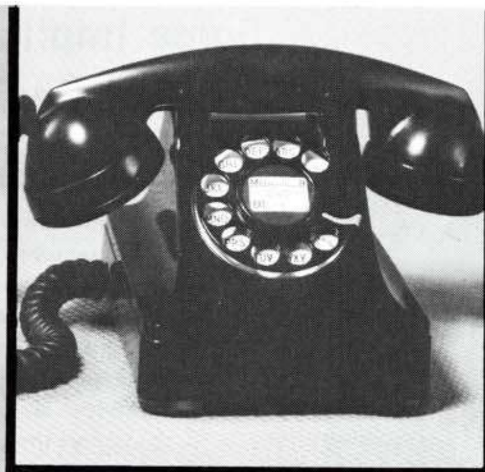
Industrial products design is actually a group process. The designer is an integral part of a team that may include engineers, draftsmen, merchandising personnel, production managers, cost analysts, and other company officials.

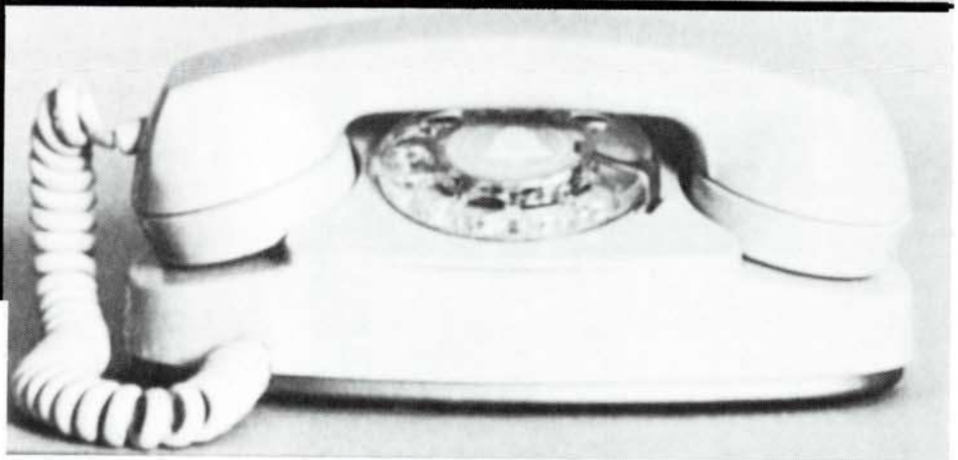
A designer of mass-produced products must acquire or have knowledge of materials and manufacturing processes involved in the specific article, as well as an understanding of the intended uses, the types of purchasers, and the various aspects in merchandising the product.

The designer is also involved in selective concessions. After the original design, concessions are made to tooling, fabrication, assembly, marketing, and often to the Underwriters' Laboratory. The kinds of information that the designer should be concerned with in working on a problem of design for any specific product or interrelated group of products may include:



- Background facts and questions
  - — is the product needed?
  - — previous versions of the product (if any)
  - — will the product enhance life in some way?
  - — competitor's products
  - — related products of the same manufacturer
  - — manufacturing processes, facilities, and personnel
  - — cost of manufacture
  - — sales promotion policies
- Aspects of the product
  - — its use or function
  - — type of user (career woman, child, factory worker, family man, farmer, fisherman, hobbyist, housewife, office worker, student, teacher, etc.)
  - — situation in which product is used (home, business, office, factory, boat, school, etc.)
- Aspects related to use
  - — convenience and efficiency
  - — safety
  - — durability
  - — weight
  - — size
  - — noise level (if any)
  - — maintenance factors
- Esthetic aspects
  - — color
  - — form
  - — texture
  - — three-dimensional and two-dimensional composition





TELEPHONE 1921

TELEPHONE 1936–37

PRINCESS TELEPHONE 1959

TOUCH-TONE TELEPHONE 1964

BELL Telephone Laboratories, New York, New York

The following are major steps in design procedures:

- Making preliminary rough sketches
- Constructing experimental models
- Selecting the most promising designs
- Rendering selected designs
- Making models of finished designs
- Detailing:
  - — nameplate, trademark, directions for operation
  - — final surface finish, color, texture
  - — packaging, display, and other aspects of sales promotion and marketing

Suggested Topics for Presentation and Discussion

- Design as a means of artistic expression and communication.
- The relationship of objects to the culture that produced them.
- The order given to form and space by design, which makes our environment more readily comprehensible. The organization of a well-designed object should be stimulating and satisfying.
- The elements of design (line, form, space, shape, color, value, and texture) and their application to product design.
- The history of the industrial revolution, with emphasis on the gradual merging of the skills and talents of the engineer-mechanic of the industrial revolution and the artist of Victorian times, to produce the product designer of today. Display examples from these periods.
- Interrelationship of function and form, enrichment of functional form, the gradual, historical breakdown of functional form, and its rebirth that came about in the 1920's because of the advancement in technical facility and mass production techniques. (Classic examples of nonfunctional kinds of design might be the Corinthian columns of cast iron used as supports for stationary steam engines, cast iron pilasters for the facades of buildings in the Victorian period and in the 1930's, the craze for streamlining—whether the object moved or not, and the functionless tail fins of automobiles a number of years ago.)
- How industrial design studios today develop many answers to problems that call for imagination, taste, public contact, motivation, and visual and tactile appeal.

COFFEE MILL circa 1910, iron. Museum of Science and Industry, Chicago, Illinois.

Some Implications of Product Design

Demonstrate and Discuss—

- Through the use of objects, slides, films, filmstrips, and photographs,
  - — designs found in ancient cultures
  - — the various forms of Ancient Greek vases
  - — buildings of Ancient Egypt, Greece, and Rome
  - — Romanesque and Gothic churches
  - — medieval armor and weapons
  - — tools and utensils of ancient cultures

- The gradual loss of the relation of form to function through tasteless embellishment

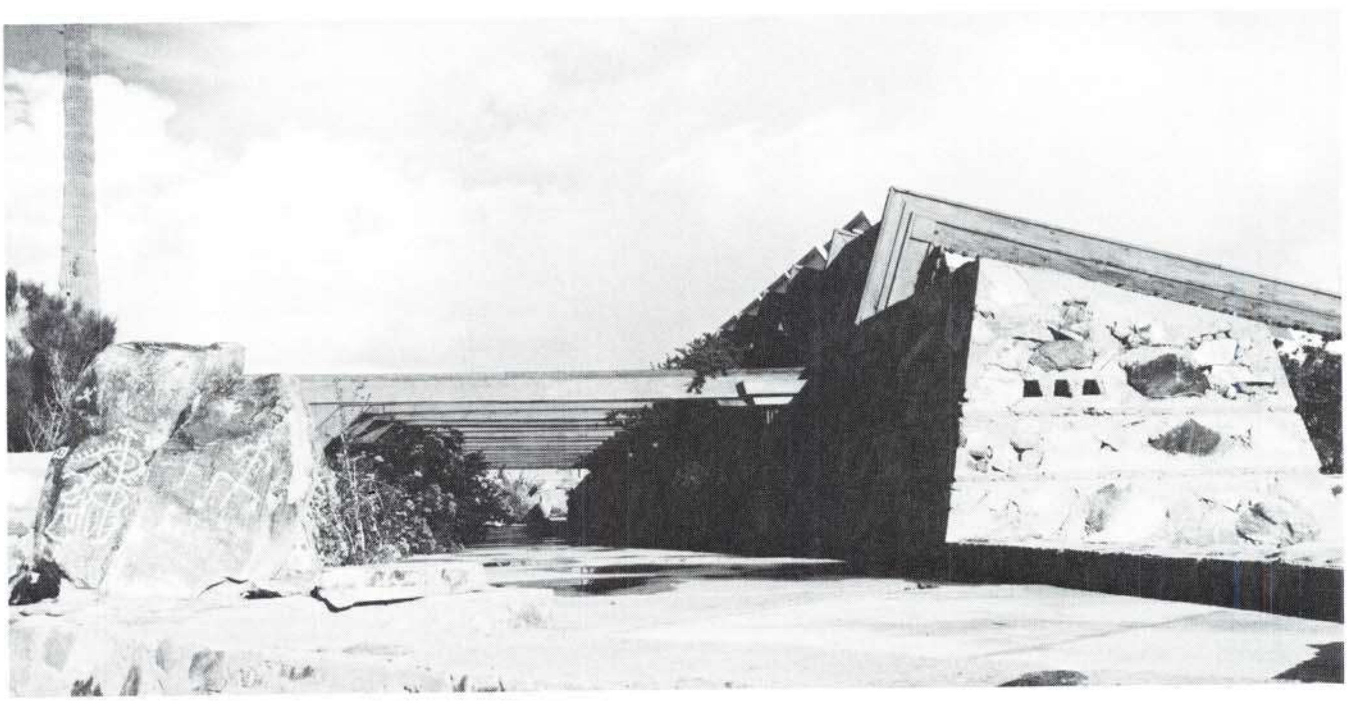
- The Bauhaus

Walter Gropius	Ludwig Mies van der Rohe
Laszlo Moholy-Nagy	Wassily Kandinsky
Paul Klee	Lyonel Feininger

- Industrial Designers

Norman Bel Geddes	Walter Dorain Teague
Joseph Sinel	Henry Dreyfuss
Raymond Loewy	Otto Kuhler
Donald Deskey	Kem Weber
Gilbert Rohde	Russell Wright
Charles Eames	Herman Miller
George Nelson	Hans Peter Nelson

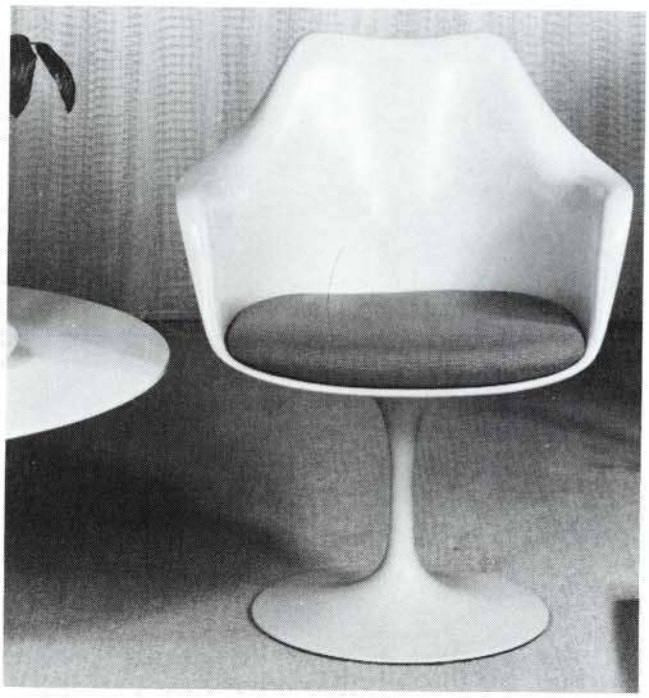
TALIESIN WEST (Terrace) Frank Lloyd Wright (1869–1959), 1938. Scottsdale, Arizona.

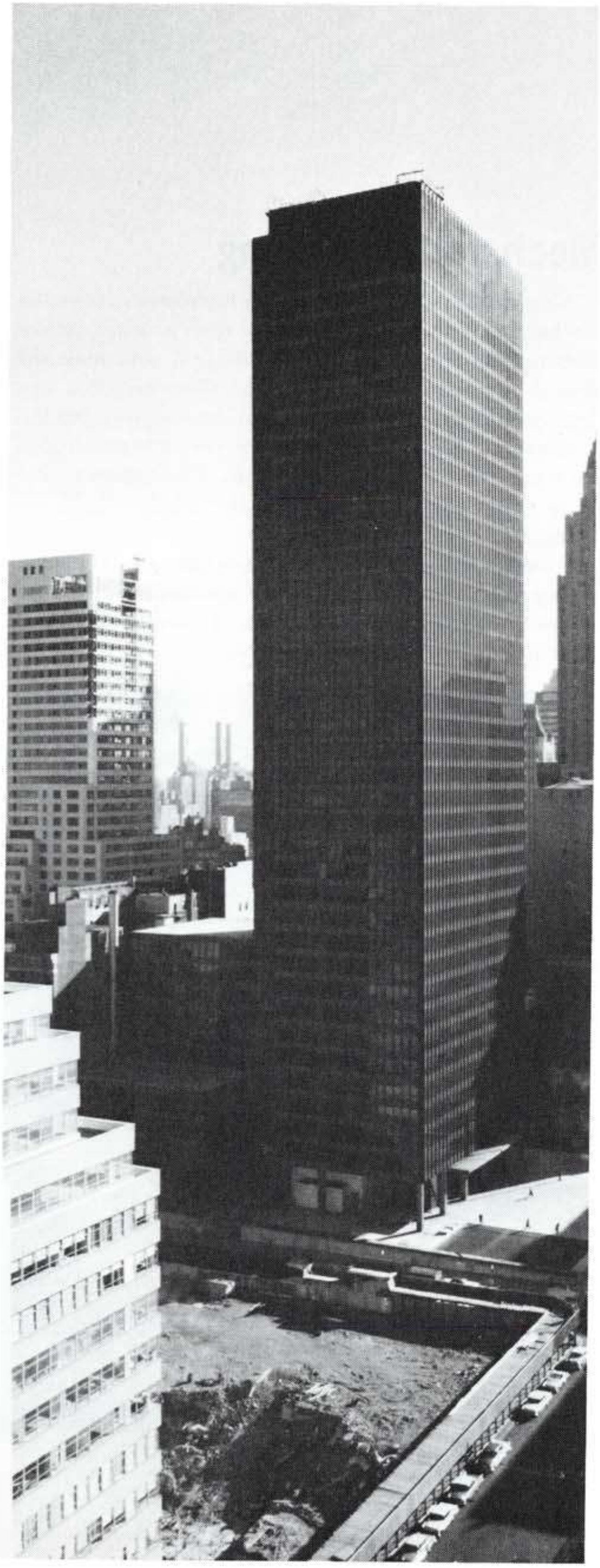


Finn Juhl
Paul McCobb
Isamu Noguchi

- Architects
  Louis Sullivan
  Eero Saarinen
  Mies van der Rohe
  Frank Lloyd Wright
  Le Corbusier
  Philip Johnson
- Methods of Production
  — fabrication
  — properties of materials
  — motivational research
- The importance of package design, merchandising, and advertising to the design of the product itself
- Why industry has produced so many unneeded products, and how this has resulted in distorted advertising to produce a need where none exists
- The effect of contemporary art (emphasizing personal expression and experimentation) on product design today
- The effects of new materials and processes
- The influence of the Scandinavian countries on product design in the past and present

ARMCHAIR Eero Saarinen, designer, 1958. Modeled plastic, fiberglass, cast aluminum base; height 32". Kroll Association, New York.



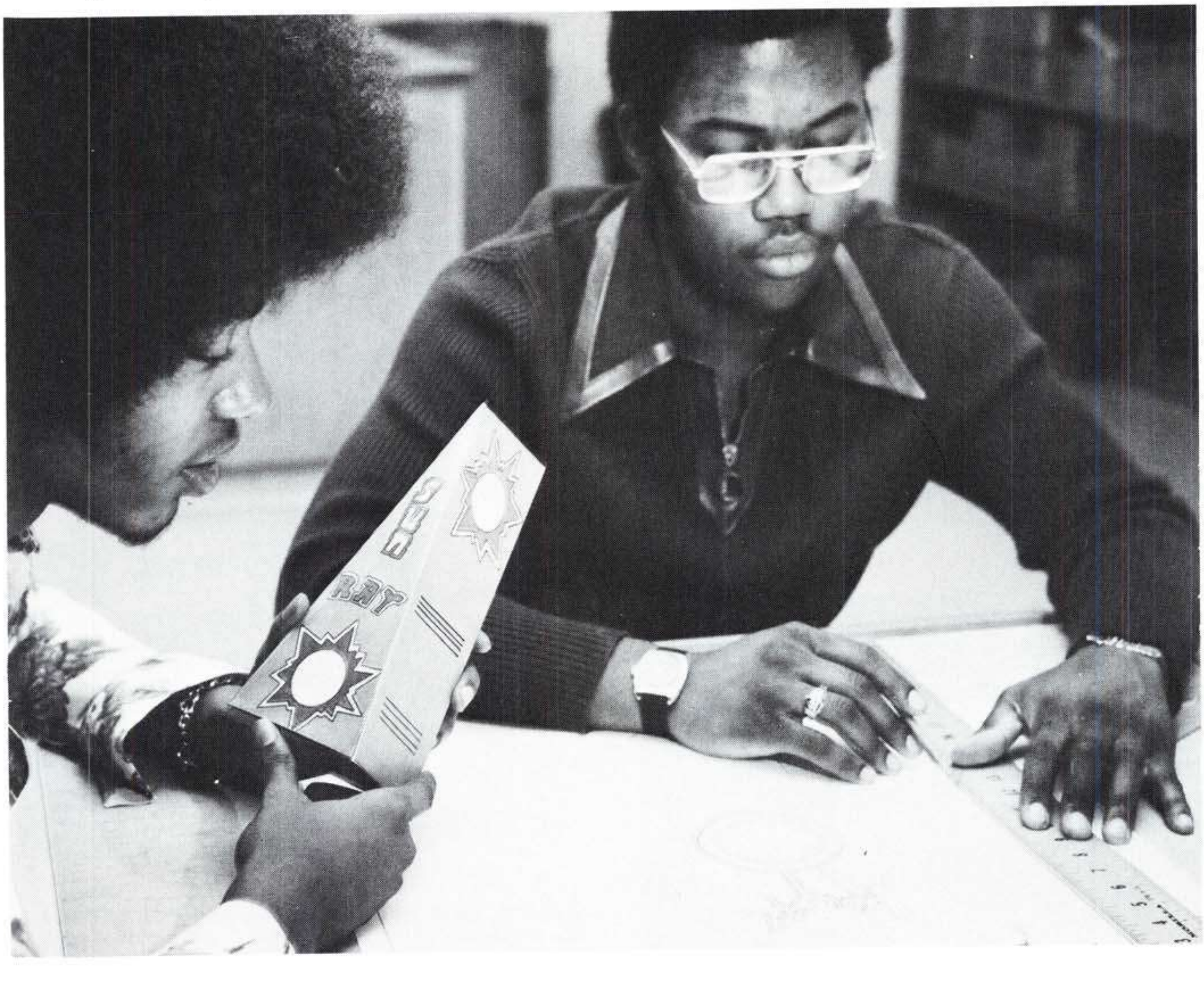


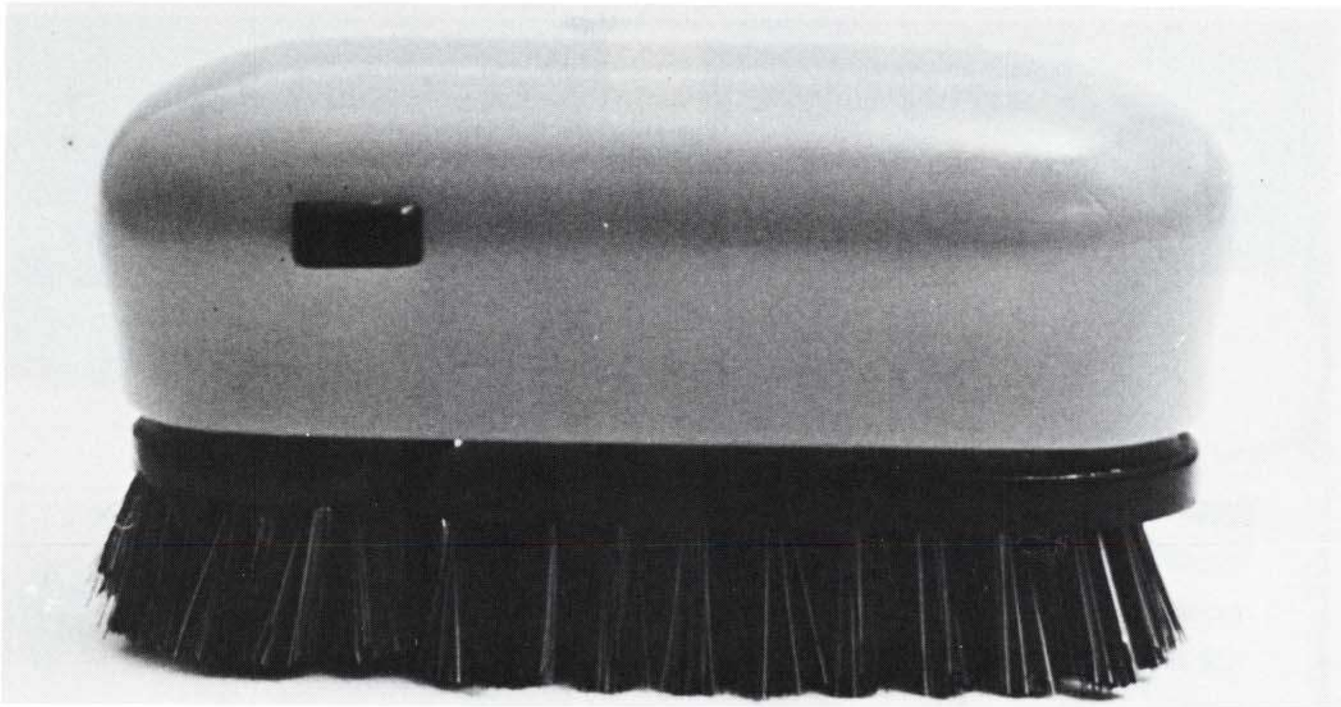
SEAGRAM'S BUILDING (Exterior) Ludwig Mies van der Rohe and Philip Johnson, 1957. Park Avenue and 53d Street, New York.

Mechanical Drawing

Although it is preferable that a foundation course in mechanical drawing be taken by each student before electing the course in product design, this may not always be possible. It is advisable, therefore, that students who have not had mechanical drawing be given the fundamental concepts and the opportunity to practice in the areas of orthographic projection, developments, and many other types of views that the teacher feels are necessary.

Students should also become familiar with the use of testing instruments, tracing, and dimensioning. Because of the free flow of ideas which will be everchanging, sketching is a vital part of the course.





Studio Experiences

Since the high school student will not be able to confer with experts in engineering, fabrication, production, merchandising, etc., it might be well if the teacher made decisions in the specialists' domain.

The student might

- Design a handle for an electronic oven door, and specify the materials to be used.
- Design a mailbox to receive magazines as well as letters.
- Design a juice container with a capacity of 1 liter, to be manufactured in a durable and attractive material.
- Design a cardboard box for enclosing a glass or plastic container of a drug or food product.
- Design a sports car, family car, or school bus, and make a model of it in any appropriate material.
- Design a box for packaging dry cereal, to be placed on a store shelf with wide face toward the purchaser; the colors may be limited to black, white, and two other colors.
- Design a shipping carton for a product having visual appeal; use one color on a colored stock.
- Design several individual plastic milk containers to be used with a straw; the color scheme is one color on white or cream stock.
- Design a counter display unit for lipstick or any other cosmetic product; include appropriate lettering.
- Design a kitchen unit including sink, stove, and refrigerator.
- Design a coat rack to be used in kindergartens; should be suitable for each child's winter clothing including snowboots, snowsuits, hats, and any other articles carried by hand.
- Design a playground sculpture, designed for safety and durability, which can withstand weathering.

Independent Studio Projects

Problems such as the following might be developed for those students who have special interest in a particular area of product design and show aptitude for it. Intensive study should be done in the production methods and materials applicable to each group.

Appliances

The student might

- Design scale models of a group of matching electrical appliances: 8-cup percolator, toaster, frying pan, grill, and waffle iron. All should have automatic controls that allow for submerging the product for cleaning. Controls may or may not be permanently built in.
- Design a compact, counter-height matching washer and dryer unit. Include rendering, scale models, and plans.
- Design a lighting fixture to hang over the dining room table in a contemporary home. Work out several interior sketches in color, showing this fixture in the proper setting.
- Design a heavy-duty electric power drill. Make necessary plans, sketches, and a model of clay or plasteline.

FURNITURE AND INTERIOR DESIGN

The student might

- Design and make a scale model of a laminated natural wood and plastic coffee table. The tabletop should be a soft shape, designed so that there is a minimum amount of scrap waste. Design an occasional chair of molded wood and plastic to complement the coffee table.
- Design and make a scale model of a motel room (4.5 meters x 6.0 meters) with bed and dresser or chest of drawers to match. Include bathroom and interior and exterior accesses to the room.
- Design and provide a model of a portable one-room house 5.0 meters x 7.2 meters x 2.4 meters. The house is to have sleeping accommodations for two persons and have indoor cooking facilities. This structure would be used in place of a tent for camping and should be in small, light units to be easily erected in less than one hour by two people. Design a camping trailer for carrying the sections and furniture needed.
- Design a group of collapsible coordinated lawn furniture of various types.
- Design a coordinated living room group including sofa, easy chair, occasional chair, coffee table, end table, and lighting fixtures. Work out sketches and plans for each piece. Render sketches of furniture in the room.
- Design the interior of a small, inexpensive hunting or ski lodge. Plan all facilities needed. Work out necessary sketches of each room; include furnishings as well as floor plan.
- Design a cocktail table, matching chairs, glasses, and menu cover. All items are to be mass-produced for a restaurant chain. Each item would bear a trademark or insignia designed by the student.

PACKAGING AND DISPLAY

The student might

- Design and construct a line of packaging for a large commercial bakery. Include such items as doughnuts, breads, cakes, pies, and cookies. Special attention should be given to the trademark, visualizing the baked goods, and the appearance of the display on the grocer's shelf. Design an inexpensive unit for displaying these goods in a store.

- Design a complete line of containers for articles to be sold in an exclusive chain of men's or women's wear stores. These might include containers for a suit, coat, or dress; ties, gloves, hosiery or socks, slacks, shirts or blouses, and hats. Consider problems of folding and carrying. All containers should convey an image of an exclusive chain and should indicate a definite masculine or feminine image according to the article.
- Design and construct a cosmetic line including containers and packages for lipstick, powder, eyeliner, perfume, toilet water, soap, and creams. Design and construct a gift box containing a group of items from this line. Work out a floor display unit that would arrive collapsed and be easily erected by a retailer. The display unit would also allow storage for additional stock.

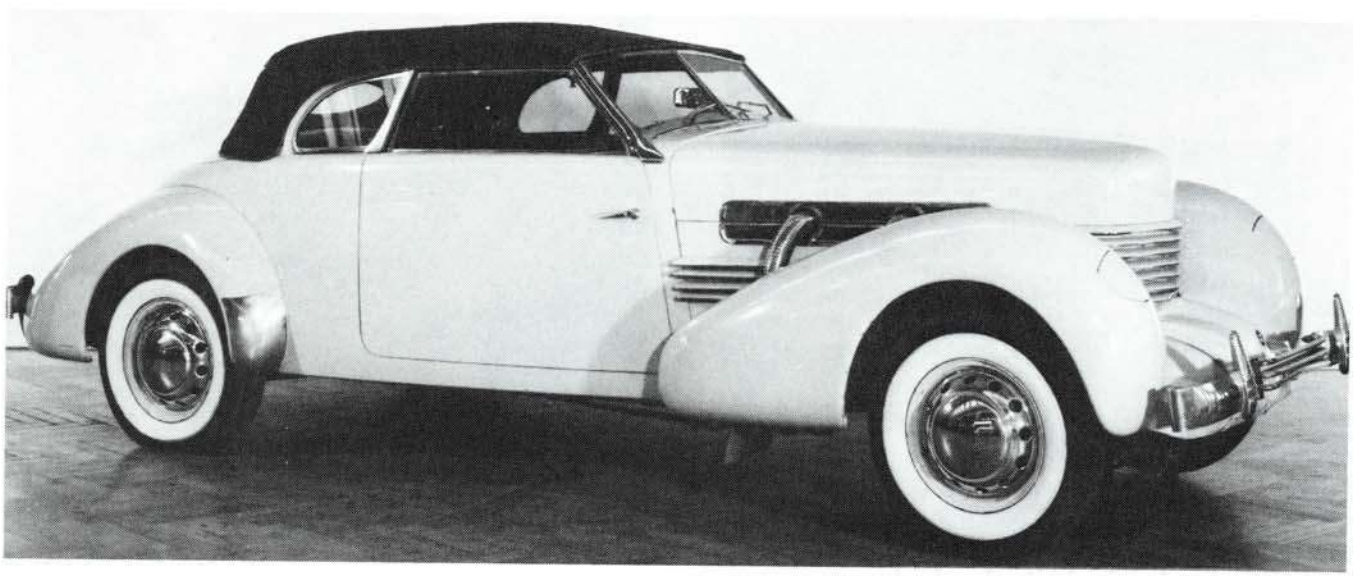
VEHICLE DESIGN

The student might

- Design and construct a scale model of a nonmetallic passenger automobile with an air-cooled engine, to be used in city traffic.
- Design an amphibious vehicle with good road characteristics at speeds of 90 kph and a speed of 50 kph on water. The vehicle is to be used by a family of four. Include plans and a rendering.
- Design a camping unit which is also a mode of transportation. Make sketches, models, and renderings of several views of the interior and exterior of the vehicle.
- Design an auxiliary sailboat 8.0 meters long with 3.5 meter beam, to sleep four. The auxiliary motor is an outboard. Comfort and seaworthiness are the prime considerations rather than speed. Provide plans, rendering of the boat in action, and a scale model.

FORD Ford Motor Co., circa 1924. Model T; two-door, five-passenger sedan. Ford Museum, Dearborn, Michigan.

CORD Auburn-Duesenberg Cord Co., 1936–37. Automobile, classic design, length 17′2″ Ford Museum, Dearborn, Michigan.



TABLEWARE

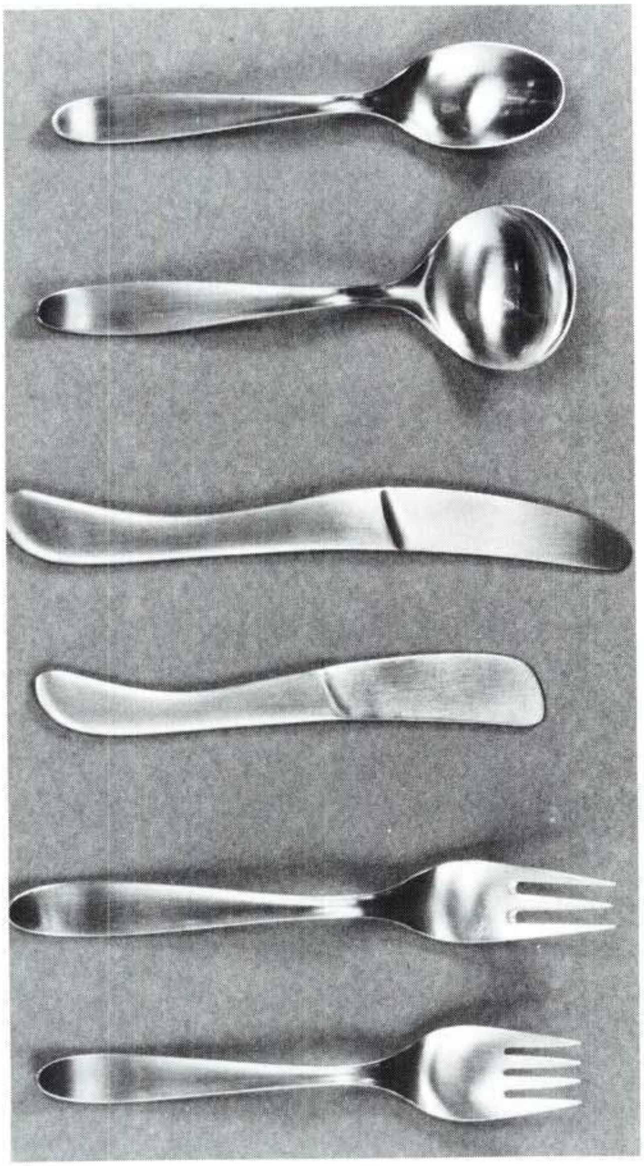
The student might

- Design and make a clay model of a large salad bowl with accompanying serving utensils.
- Design and hand-build or turn on the potter's wheel a group of coordinated ceramic pieces such as a water pitcher, creamer and sugar bowl, or salt and pepper shakers.
- Design and hand-build several utensils for use at an outdoor barbecue, such as a hamburger turner, a fork, and tongs.

ARCHITECTURE

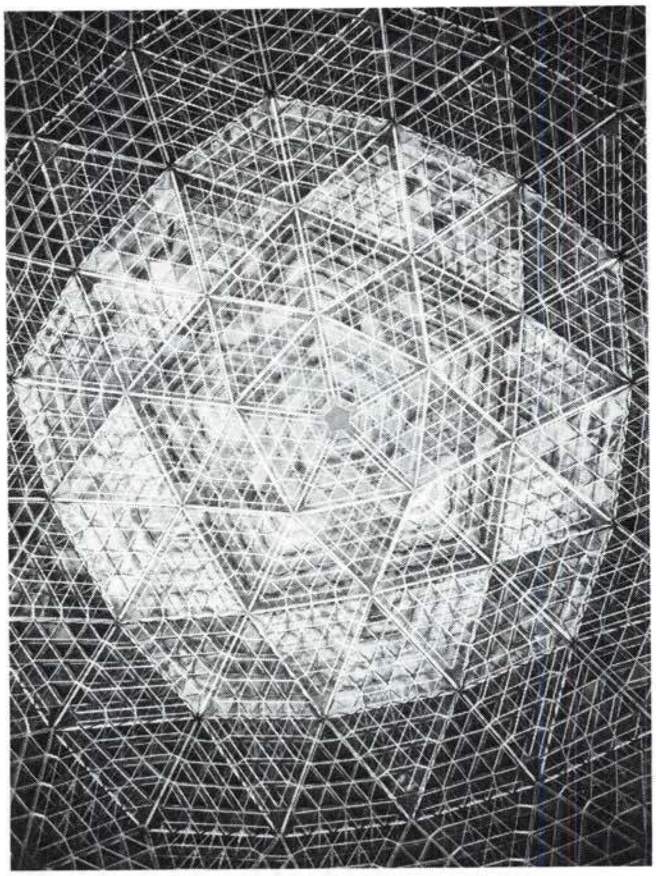
The student might

- Select a congested area of his city, town, or village and redesign this area while keeping within it all existing businesses and living centers. Work out possible solutions, and select one to be created as a scale model.
- Design all items that one would choose to place in an elementary school playground whose area is 50 x 35 meters. This will be used by primary age children. Think in terms of things children would like to do, rather than of existing playground activities you have observed. Make scale models, and design landscaping and arrangement of the area.
- Design and landscape the exterior of a building that will contain the offices of six physicians, to be located on a section of suburban property 50 x 25 meters. This property has a stream running through it, and is on slightly rolling terrain.
- Plan an automated supermarket, including front elevation, method of interior traffic flow, checkout booths, wholesale delivery facilities, and store-to-car delivery systems.



FLATWARE Don Wallance, designer. H. E. Lauffer Co., 1954. "Design One," stainless steel, length 6½" to 8". Museum of Modern Art, New York.

FORD ROTUNDA OCTET TRUSS DOME. R. Buckminster Fuller, 1953. Interior, looking into dome 130′ above floor. Detroit, Michigan.



Evaluation

- Has the student developed creative solutions to the problems that he has undertaken?
- Has the student developed awareness that those who actually enter the product design field as a career must have some knowledge of engineering, production, merchandising, advertising, architecture, and typography, as well as art and design?
- Has the student been involved in research and study of current trends in product design?
- Does the student's work indicate that he has developed the essential techniques in using appropriate tools and materials?

SUGGESTED READING

Albers, Anni. *On Designing*. New Haven: Pellango Press. 1959.

Albers, Joseph. *Interaction of Color*. New Haven: Yale University Press, 1963.

Art Directors Club of New York. Annuals of *Advertising and Editorial Art and Design*. New York, 1964.

Bach, Robert O. (ed.). *Communication–The Art of Understanding and Being Understood*. (Includes discussions by Saul Bass, George Nelson, Oleg Cassini, Robert Osborn; delivered at 7th Annual Visual Communications Conference, sponsored by Art Directors Club of New York). New York: Hastings House.

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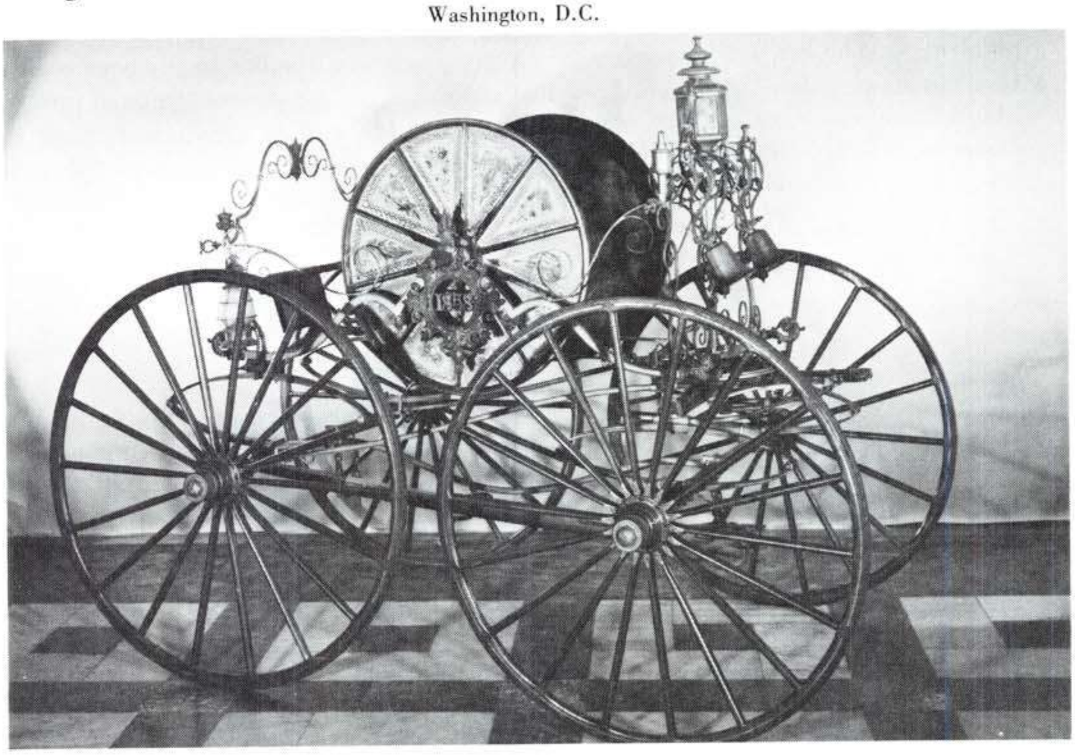

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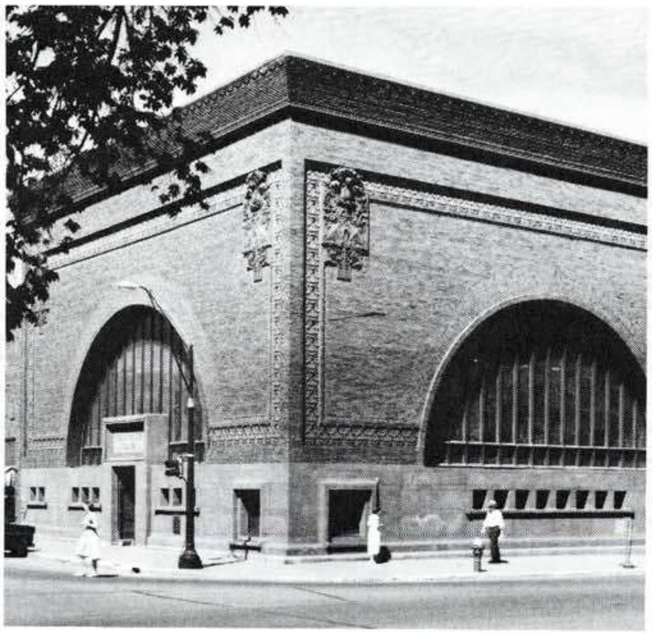
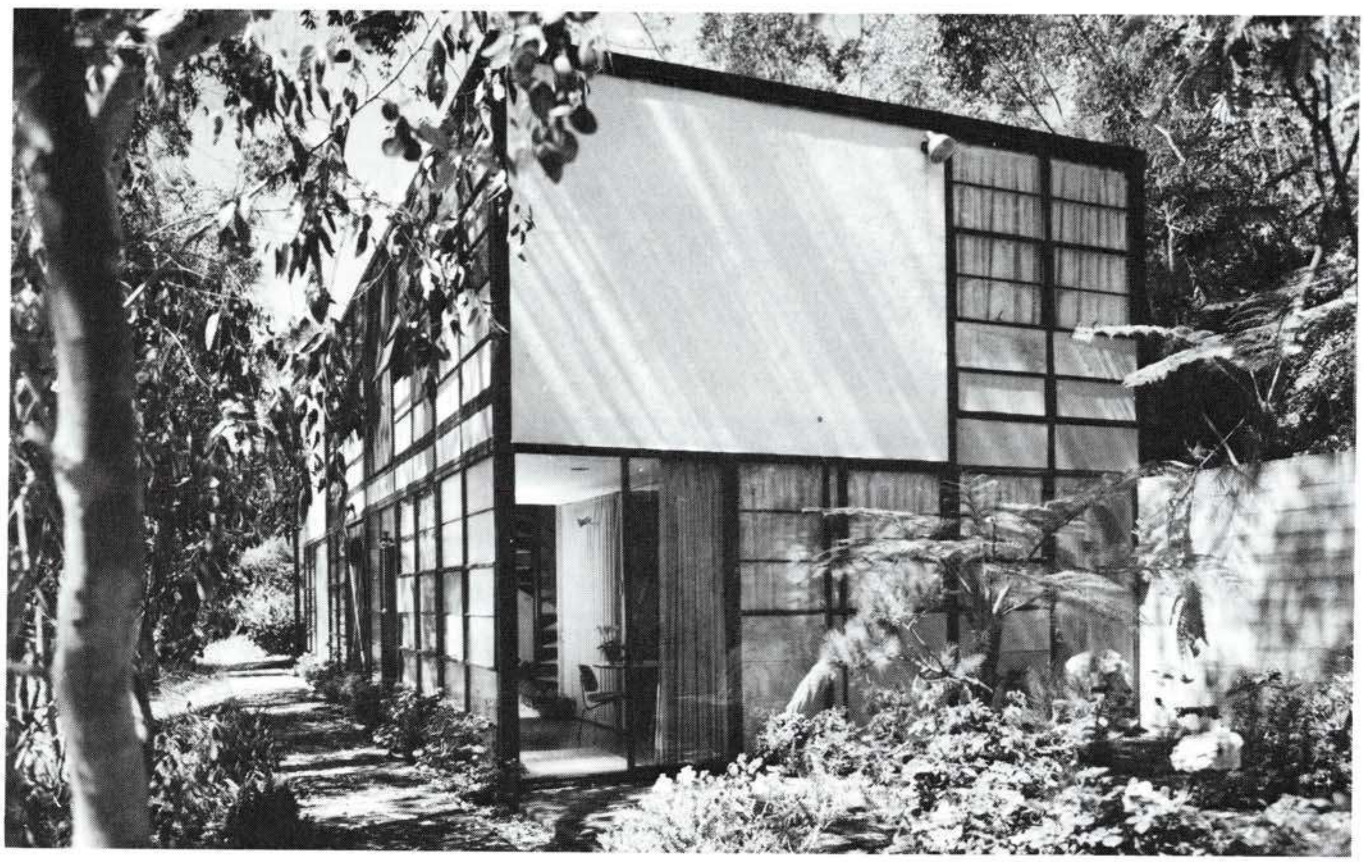
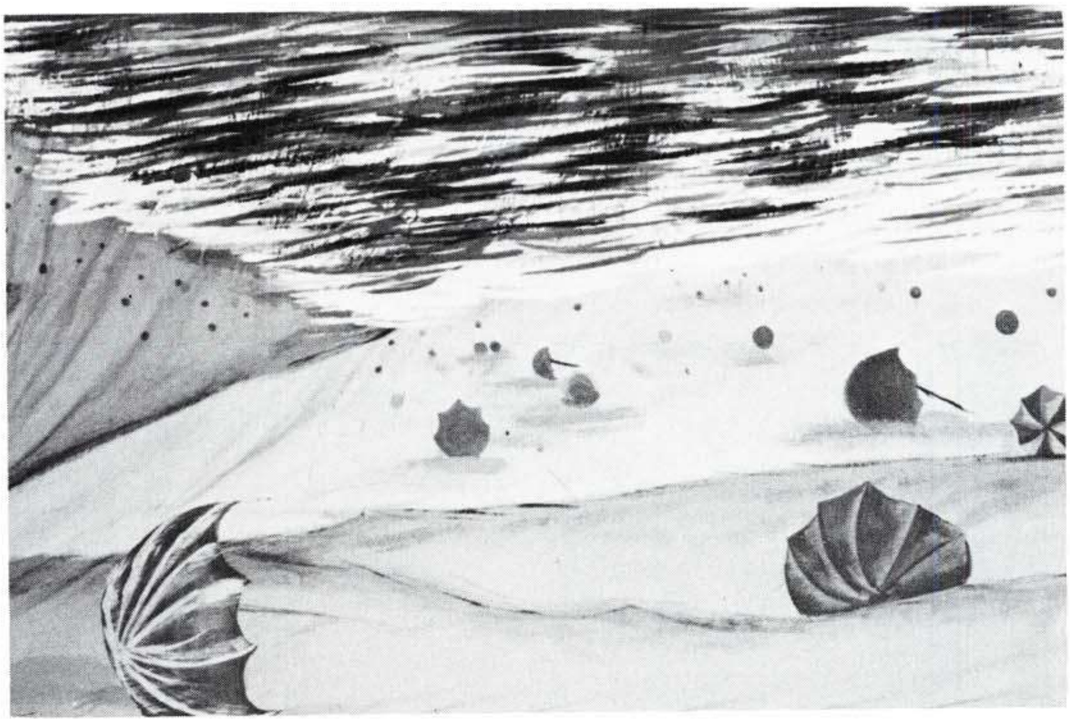
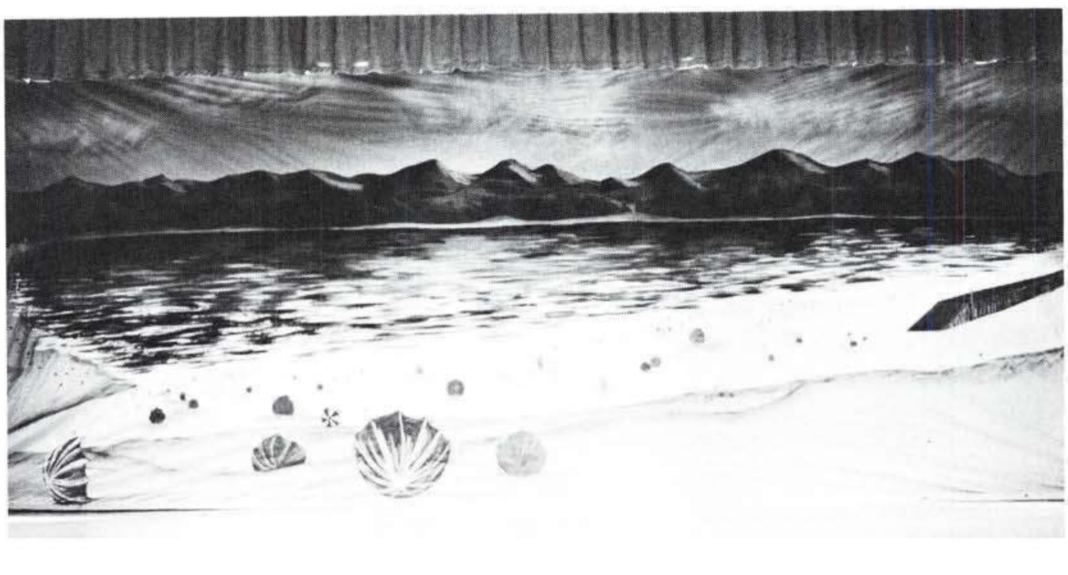


THE SECURITY BANK (Exterior) Louis Sullivan (1856–1924), 1907–08. West Broadway and North Cedar, Owatonna, Minnesota.

CHARLES EAMES HOUSE (Exterior) Charles Eames (1907–), 1949. 203 Chautauqua Boulevard, Pacific Palisades, California.







STUDIO IN STAGE DESIGN

COURSE DESCRIPTION

This is an advanced course to be elected after a student has completed a year of *Studio in Art*. It should develop in students the knowledge and understanding of the esthetic principles and skills essential to stage design. Since successful stage design is dependent upon, and helps to create, the interaction of the actors within the setting of the play, students should be encouraged to read or view a wide variety of stage presentations.

SCOPE

The course illustrates the complex interrelationships inherent to successful stage design. Student experiences with lighting effects, movable sets, perspective, and set development should be made as meaningful as possible.

STUDENT OBJECTIVES

Upon satisfactory completion of unique segments of this course of study a student should be able to demonstrate:

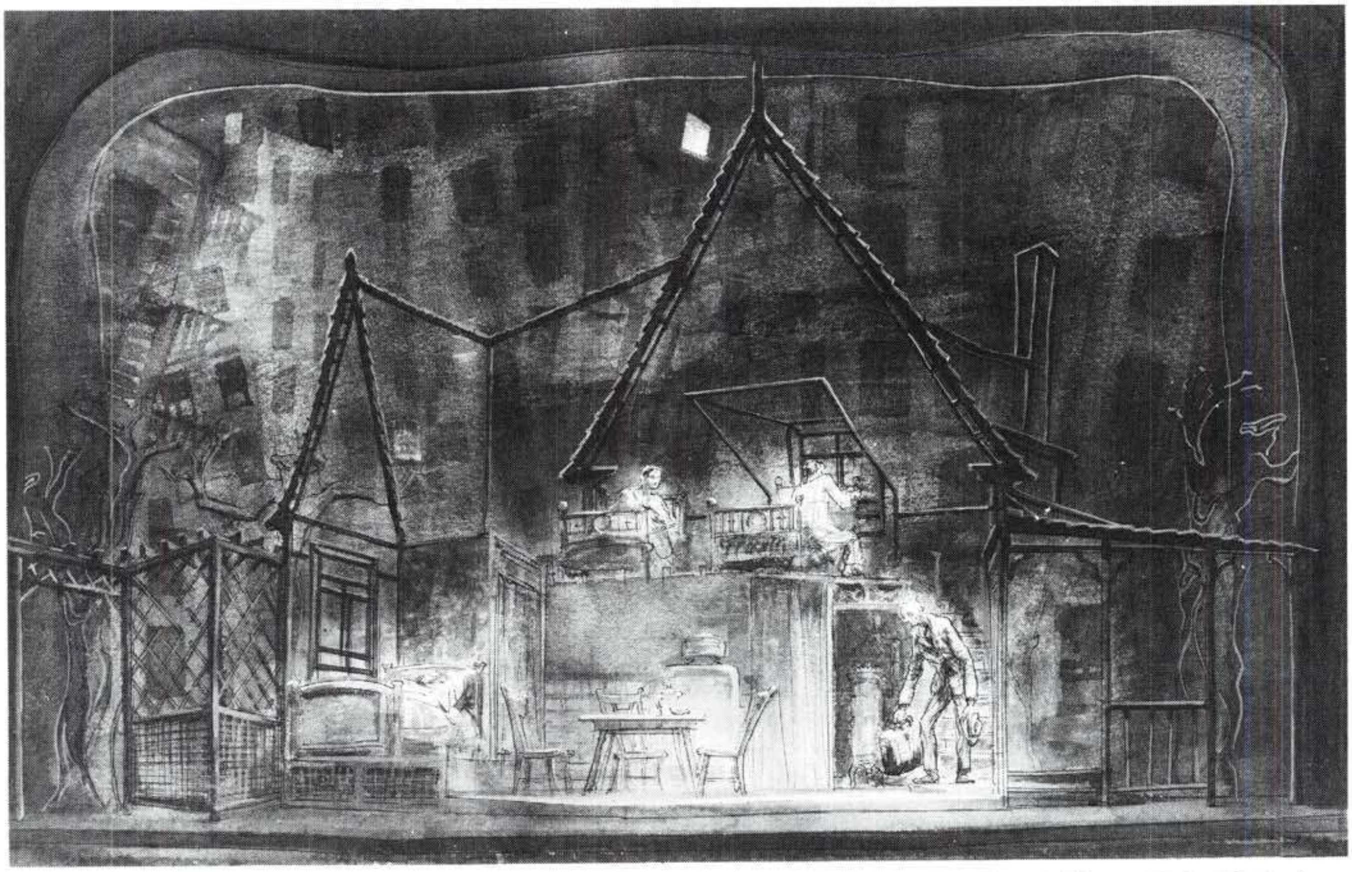
- Application of the elements and principles of visual design to the specific problems encountered in stage design
- Creative imagination through appropriate activities, which include developmental sketches and three-dimensional scale models
- Technical knowledge of the subject through workshop experiences combining theory and practice
- Background knowledge of theater arts of other historical periods and of other world regions.

INTRODUCTION TO STAGE DESIGN

The study of stage sets includes both design and technical aspects. In addition to viewing pictures, models, and slides, students should participate in the construction of scenery for the school stage and work with the lighting crew, or have several opportunities to observe the work of the stage crew and lighting crew. A knowledge of technical resources is needed by the artist so that he can design scenery that is practical to construct, set up, and strike.

A review of the elements of design as presented in the foundation course, *Studio in Art*, should be made in the early sessions of the course. Stage settings, like sculpture, are three-dimensional. The students should be well acquainted with the use of the elements of design (line, color, space, form, and texture) in achieving a harmonious stage design through application of the principles of balance, rhythm and repetition, dominance and subordination, and proportion.

Pictures of set designs by eminent designers such as Joseph Svoboda, Norman Bel Geddes, Lee Simonson, Robert Edmund Jones, and Jo Mielziner are useful in demonstrating the applications of these principles.



(above) "Death of a Salesman" 1949. House with Four Figures. Settings designed by Jo Mielziner; photographs by Peter Juley.

(below) "Death of a Salesman" 1949. House with Leaf Projections. Settings designed by Jo Mielziner; photographed by Peter Juley.

Scope of Stage Design

Stage design embraces the total concept of the stage with actors upon it. It includes effects produced by the setting, the stage properties, the lighting, the costumes, the makeup of the actors, and the positions and movement of the actors in time and space.

Typically, in the professional theater, although the play director has the final decision on all of these components, the designing is shared among several people working as a team. The set designer, the lighting designer, and the director plan the positions and movements of the actors. It is the director who determines the interpretation of the play and sees that all of the components are coordinated to secure a unified effect.

In school productions, these responsibilities may be assigned somewhat differently and conditions may differ from school to school. Often the dramatics teacher, who is usually the play director, will have an active role in the designing of the set, the costumes, and the lighting of the stage. In some instances there will be assistance by other teachers and by students of diverse subjects such as home economics (for costumes), industrial arts (for set construction and lighting), and art (for designing the visual elements).

The major focus of this course is on the role of the artist as a designer of the setting, the costumes, the makeup, and the lighting. Since the purpose of these efforts is to enhance the effects of the play, opera, or ballet on the audience, the designer must know the production's intent and how it will be interpreted by the director and the actors.

Through the visual aspects of the production, the designer's aim is to provide a specific mood or atmosphere and an illusion of the time and place of the action to enhance the objectives of the playwright and of the director.

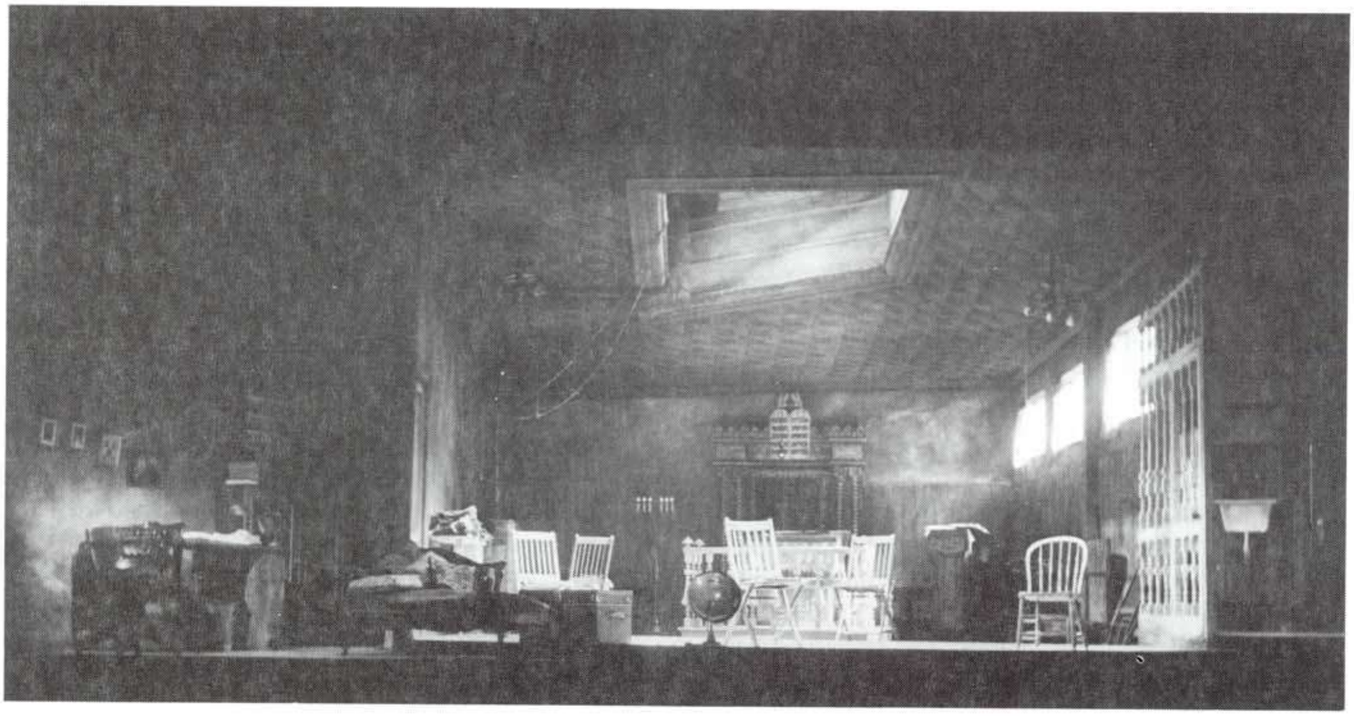
Historical and Contemporary Trends and Styles

The introduction of all topics should include the use of pictures, models, slides, and reference works.

Review and Discuss —

- The theater, the stage, and stage design related to the dramatic forms in the various historical periods from their earliest beginnings, including non-Western cultures. Include Greek amphitheater, Roman theater, Medieval stages, Elizabethan theater, Kabuki theater, American Indian pageantry and ceremonial dances, modern and classical ballet, puppet theater, 20th-century traditional staging for drama and musical productions, experimental theater, and innovations in the theater today.
- The physical theater, including the proscenium theater, thrust theater, arena theater, and the experimental black box theater or multiform theater.

"The Tenth Man" 1960. Set and lighting by David Hays.



Unity of Sets, Lighting, Costumes, and Makeup

Scenery and properties, costumes, makeup, and lighting constitute the complete setting and assist in the interpretation of the play by the actors to produce a unified whole. The artist will use these components in such a way as to achieve harmony in the design and also to contribute to the dominant effect aimed at by the director and the actors.

Design Aspects

Demonstrate —

- Selection of form and color for sets and costumes
- The effects of colored light and the difference between additive and subtractive color mixing on colors of sets and costumes and on other elements of design
- The realistic set, including the use of accessories and props
- The suggestively realistic set, where the audience is left to imagine or feel the presence of that which is not shown

Discuss —

- The concept that "form follows function" in the constructivist set
- How the suggestive set stimulates the imagination of the audience
- The use of platforms, ramps, and steps to create interest through a variety of levels
- The use of scrim for transparent scenery and the effect of alternately lighting the scrim, then the scene behind it
- The possible combinations of different styles within a specific set
- The use of symbolism in conjunction with any style
- The types of stages, including the conventional proscenium stage, the apron stage, and the theater-in-the-round

Technical Aspects

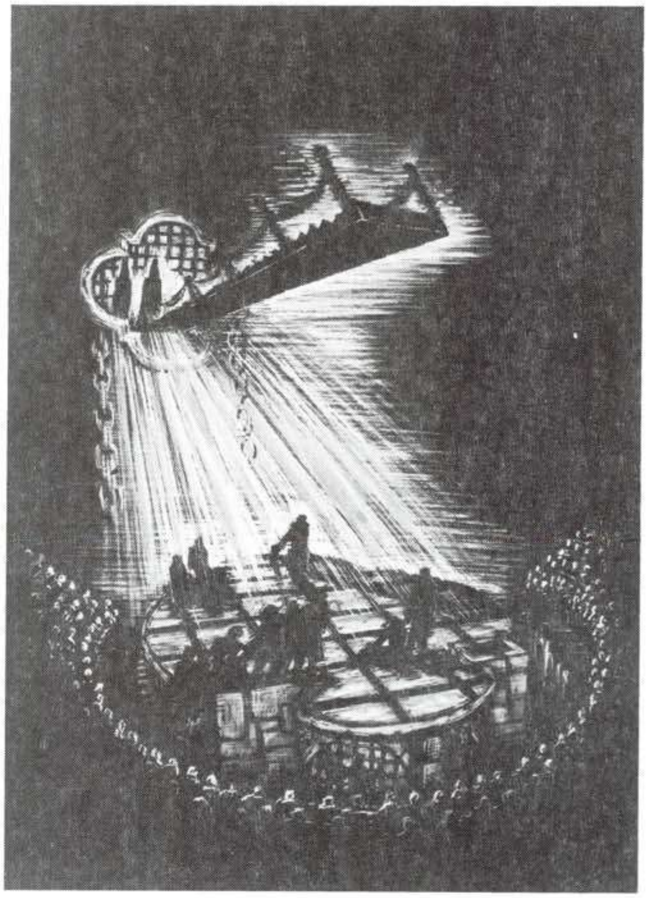
Demonstrate and Discuss —

- The various methods of scene changing: wagon (sliding) stage, circle (revolving) stage, flying, stacking, and elevators
- Components of setting: flats, wings, cyclorama, backdrops, set pieces, platforms, draperies, teasers, tormentors, and other common stage devices
- The relationship of audience seating to the stage in regard to sight lines
- The scale of a set in relation to the scale of the actors
- Stage arrangement as it relates to movement of actors. (Stage properties and scenery should accommodate or facilitate the movement of the characters, and not hamper them.)
- The preparation of scenery paints and techniques of applying paint

Lighting

Demonstrate and Discuss —

- The importance of stage lighting and its manipulation as essential to successful stage design
- The controllable properties of light: intensity, color, space, time, and movement
- The difference between colored light and pigment color, and the interaction of the colored light on pigment color of sets and costumes
- How the relative distance of the lights from the stage affects the intensity of the light
- The basic optics and principles of reflection and refraction, and how they relate to modern lighting instruments
- The qualities of light (intensity, color, distribution, movement) and the functions of light (selective visibility, revelation of form, scenic composition, representation of nature, and interpretation of mood); their importance in achieving a unity of production
- The importance of angles of light in achieving shadows or removing shadows on both set and actors' faces



"Man of LaMancha" 1965. Settings designed by Howard Bay.

- The possibilities of incorporating shadows into the total design
- The use of dimmers
- The contrast between actors and background. (Light costumes stand out against a darker set, dark costumes against a lighter set, and actors faces appear dark against a light set.)

Costumes

The treatment of this topic is of necessity limited in scope in this course. Students who desire further acquaintance with costume design might take the elective course, *Fashion Design and Illustration*.

Demonstrate and Discuss —

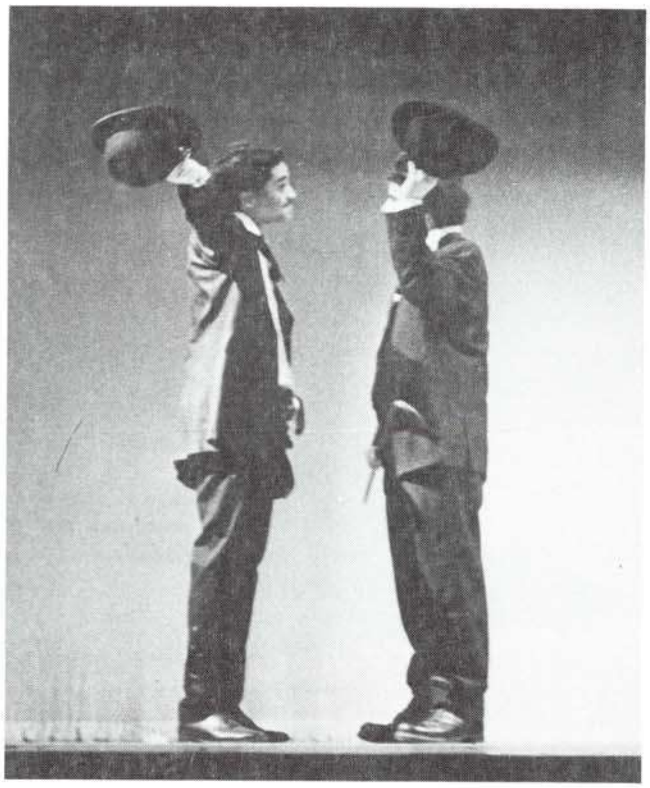
- The various styles of costuming as they correlate with corresponding styles of stage sets; the importance of harmony between costumes and stage set, and with each other
- The function of costume design in enhancing a dominant character trait of a role
- The importance of value contrast between costumes, actors, and set

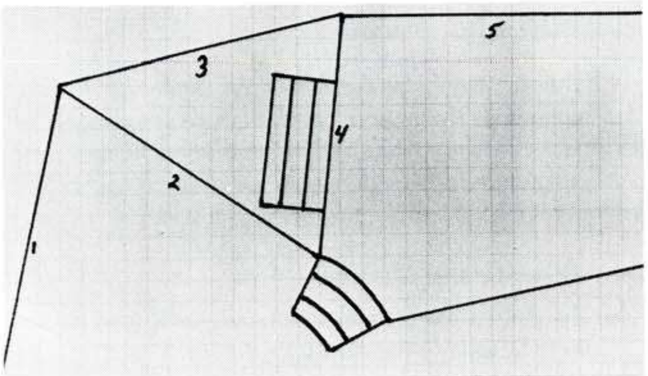
Makeup and Masks

Character study is the basis for makeup design. Makeup assists the actor or actress in the expression of dominant character traits and in the illusion of age, state of health, environment in which the character lives and works, racial heredity, etc.

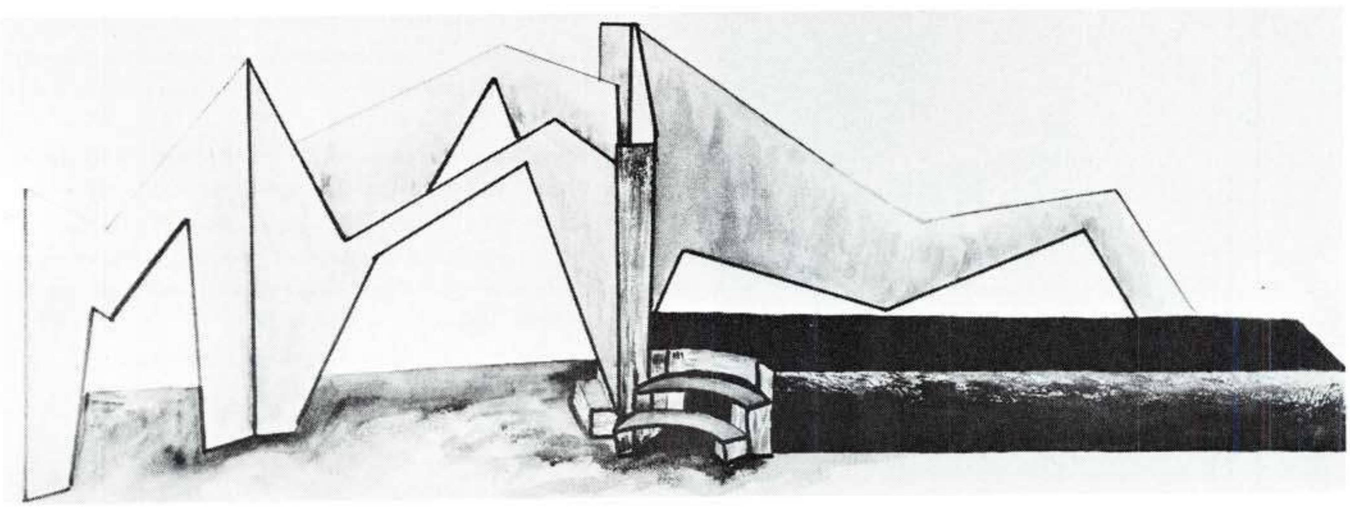
Demonstrate and Discuss —

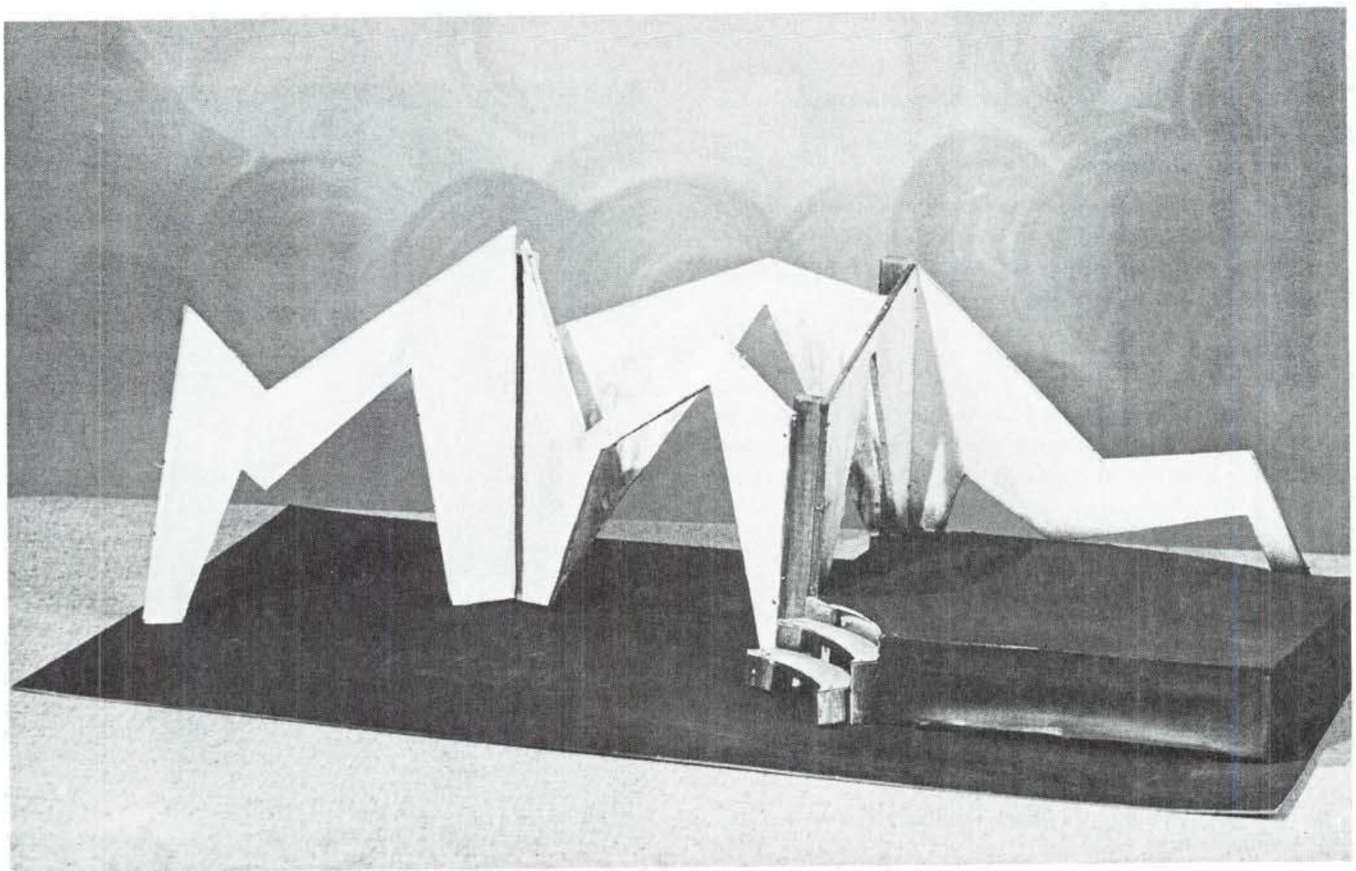
- The chief areas for makeup: head, neck, and hands; include hairstyling and hair pieces
- The use of makeup to overcome flat or washed-out effects resulting from powerful stage illumination
- Preparation of makeup artist by attending play rehearsals, consulting with directors and actors, and reading the playscript
- Knowledge of anatomy of head, face, and neck, including bone structure, muscles, and fleshy parts
- Procedures for applying grease paint in its various forms; applying rouge and powder; uses of nose putty and other three-dimensional materials; using beards, mustaches, and wigs
- The effects of colored lighting on makeup
- Various roles of the mask in:
  — the ancient Greek theater
  — the Kabuki theater
  — ceremonial dance
  — American Indian dance
  — modern plays or dances





"David and Lisa." Universal (functional) design.
(top) floor plan
(center) rendering
(bottom) model





Stage set for "The Boy Friend"

Suggestions for Student Activities

Develop a notebook and a portfolio. Make notes on the various topics studied. Collect and make sketches of stage designs, costumes, and other related items as the course of study progresses.

Stage and stage sets

The student might

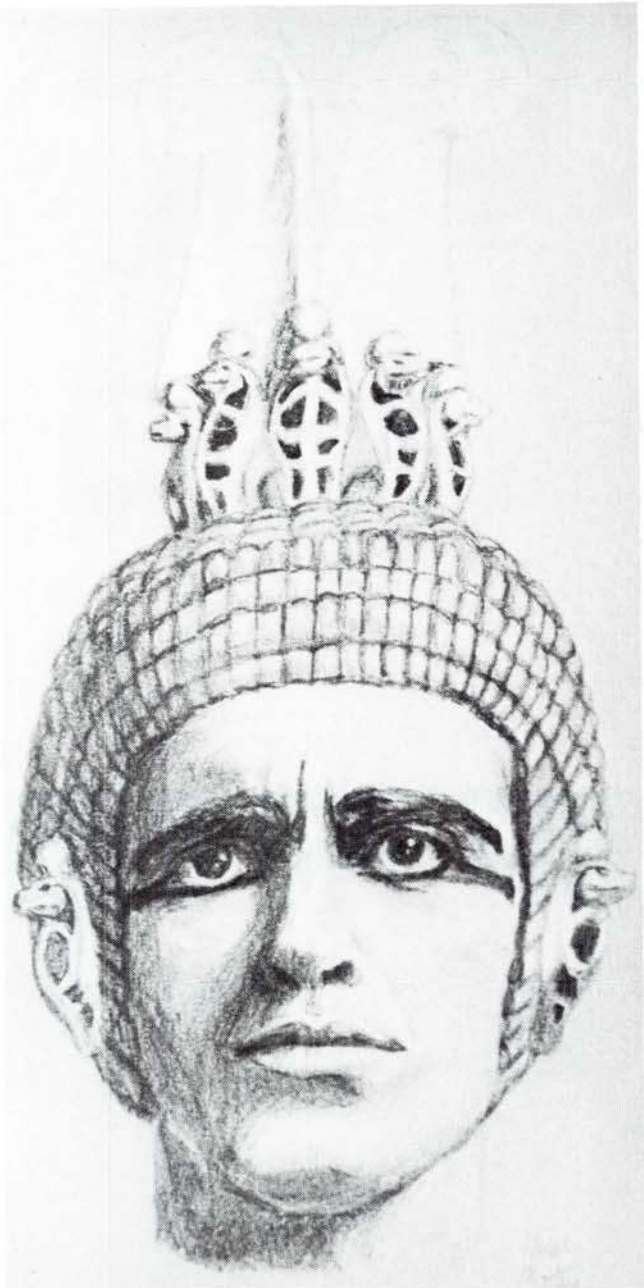
- Create several backdrop designs to portray different moods (some moods may especially lend themselves to one of the following styles: realism, abstract, impressionism, or symbolism.)
- With other students, construct plain wood frame flats with muslin, or canvas glued or tacked over them for a box set.
- Make preliminary sketches of a stage plan.
- Make a floor plan of a stage, showing proscenium, tormentors, and wings.
- Make a floor plan of a stage set to scale and sketch an elevation view.
- Construct a model of a stage set, using a convenient scale.
- Design a set that might be used for a TV variety show.

Lighting

The student might

- Use spotlights, or flashlights with colored gelatins, and experiment with the effects of color on painted scenery, on makeup, and on costumes.
- Observe what happens when red, blue, and green lights are combined to make white light.
- Observe and record the effects of spotlights and floodlights on a person standing in various areas of a bare stage. Notice changes in shadows and highlights as well as the color effects.

Stage set for "The Boy Friend" (detail)



MAKEUP

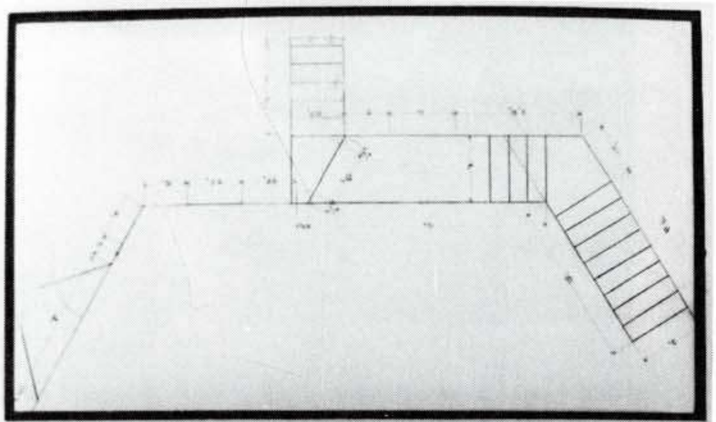
The student might

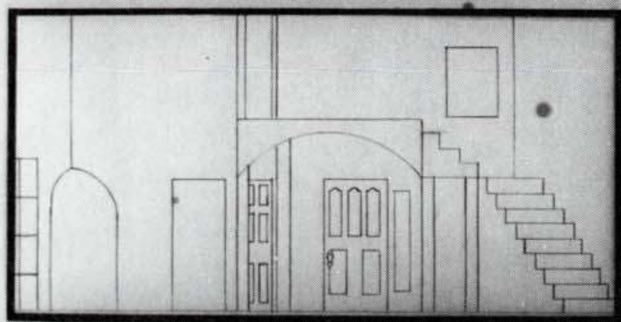
- Model a head in clay, accenting the planes and hollows of the face.
- Make several stylized, life-sized line drawings of heads of teenage girls and boys. On these, practice drawing age lines in makeup fashion. Try middle-age characteristics, old-age characteristics, etc.
- On similar sketches, practice with colored crayons or chalk to represent makeup applied for modeling the lips, applying rouge to cheeks, and emphasizing the eyes and eyebrows. In doing this, have in mind a characteristic of appearance, personality, or of basic mood.
- Select a character from a well-known play or opera, and on paper draw a head and face of an imaginary actor or actress playing the role (Lady Macbeth or other Shakespearean character, Cyrano de Bergerac, Scrooge, Marie Antoinette, Pagliacci, etc).
- Apply makeup to himself or another student in the class for a specific type of character of a certain age, using a well-lighted dressing table and mirror.
- When the school drama group is rehearsing a play, study one of the roles played, plan the makeup, and practice applying it to the student actor.
- Construct a mask showing a specific emotion or mood.

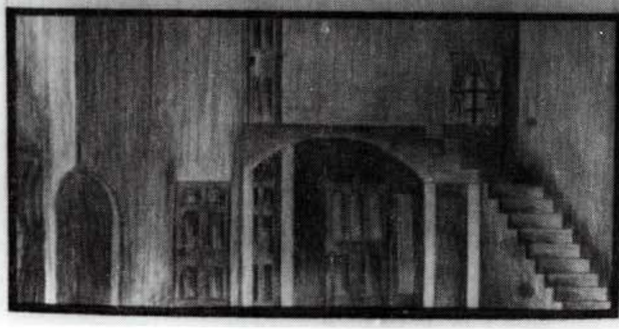
Costume design

The student might

- After watching a variety show on television, make a quick sketch of the costume worn by one of the performers.
- Choose a character from a well-known play or musical show and design each of the costumes to be worn by that character.
- Design an evening gown for a young woman, attach a swatch of the material, and estimate the yardages and cost.

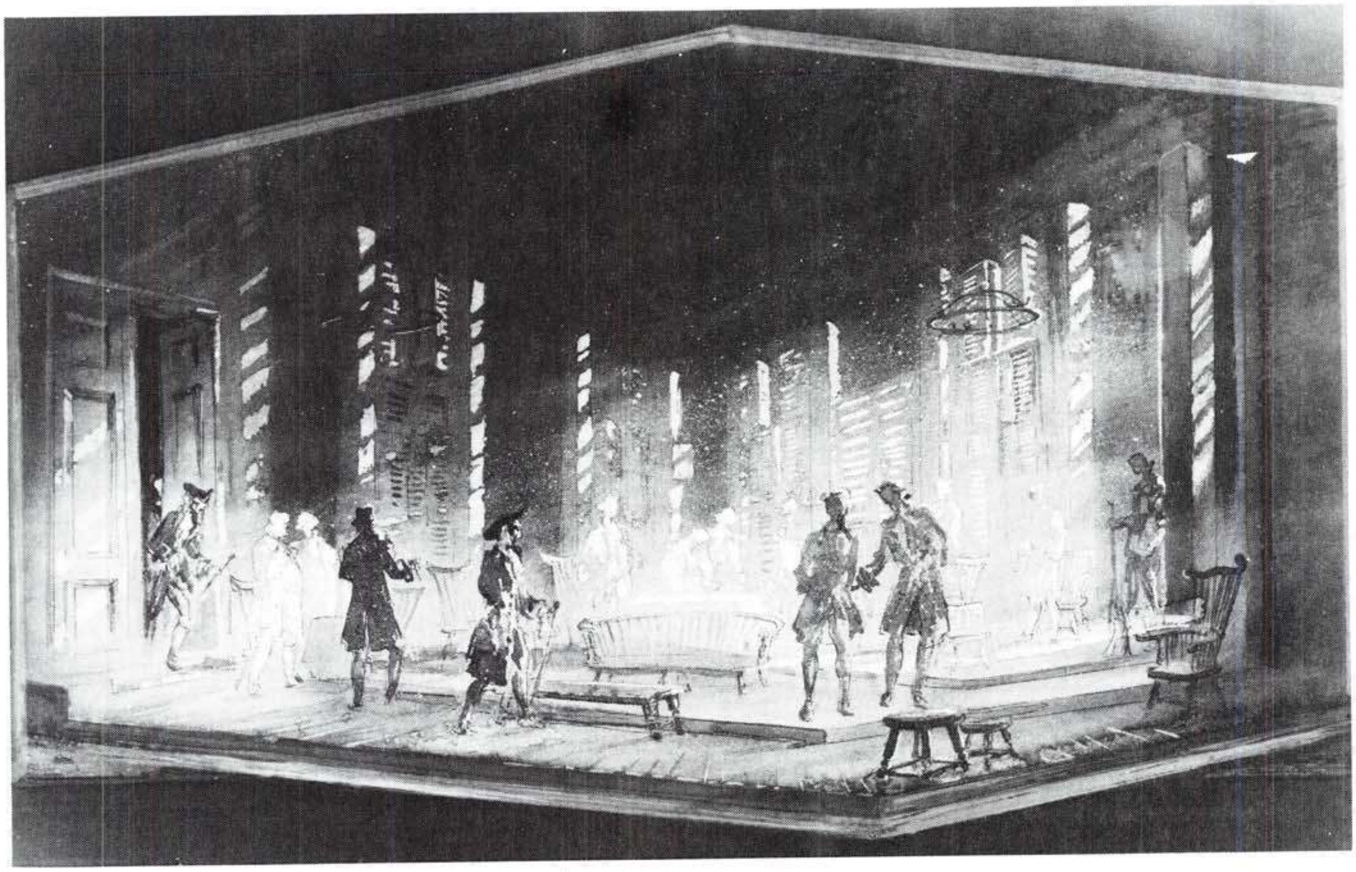






Independent Studio and Research Projects

- Make a written or oral report on any of the topics covered, and illustrate the report with original drawings and diagrams and with clippings or color slides. This report could take the form of a bulletin board display to catch the eye and convey information in an organized and concise manner.
- Create a model of an arena theater set for a familiar musical production.
- After obtaining the necessary information, construct a model of a Greek or an Elizabethan theater.
- Plan the lighting for a school production, including colors, types of equipment, and positions. Work with the light crew in installing and adjusting the lights.
- Construct a tabletop puppet theater with draw curtain and backdrop. Paint the front in a decorative style.
- Attend a production by a community theater group, making a preliminary telephone or mail request to visit backstage after the presentation to view the sets, lighting, costumes, and makeup materials.



"1776" 1969. Congress Arriving in the Morning. Settings by Jo Mielziner; photographed by Peter Juley.

(opposite) "Lohengrin" by Richard Wagner. Metropolitan Opera Company, New York. Settings designed by Charles Elson.

Evaluation

- Has the student demonstrated understanding and skill in the practical use of theatrical makeup?
- Does the student realize the importance of the total team effort (including designers, set designer, lighting designer, costume designer, and makeup artist) in designing for the theater?
- Has the student had the opportunity to experiment with stage lighting in order to clarify the difference between colored light and pigment color, and the effect of colored light on sets and costumes?
- Do the student's efforts in creating actual or model stage sets reflect an understanding of the elements of art?

SUGGESTED READING

Jackson, Sheila. *Simple Stage Costumes*. New York: Watson-Guptill, 1968.

Mielziner, Jo. *Designing for the Theatre*. New York: Bramhall House, 1971.

Motley, M. *Designing and Making Stage Costumes*. New York: Watson-Guptill, 1965.

Warre, Michael. *Designing and Making Stage Scenery*. New York: Reinhold, 1966.

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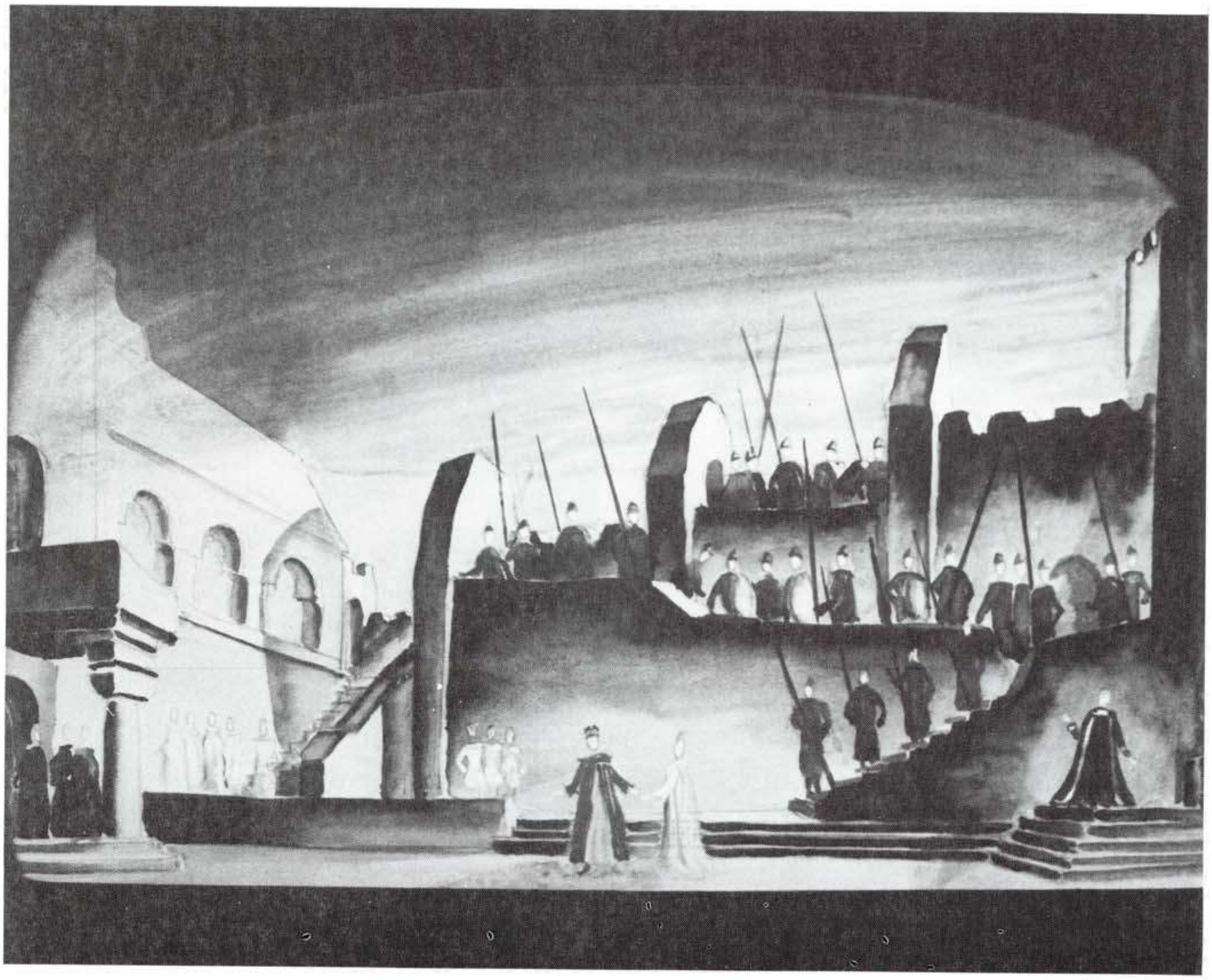
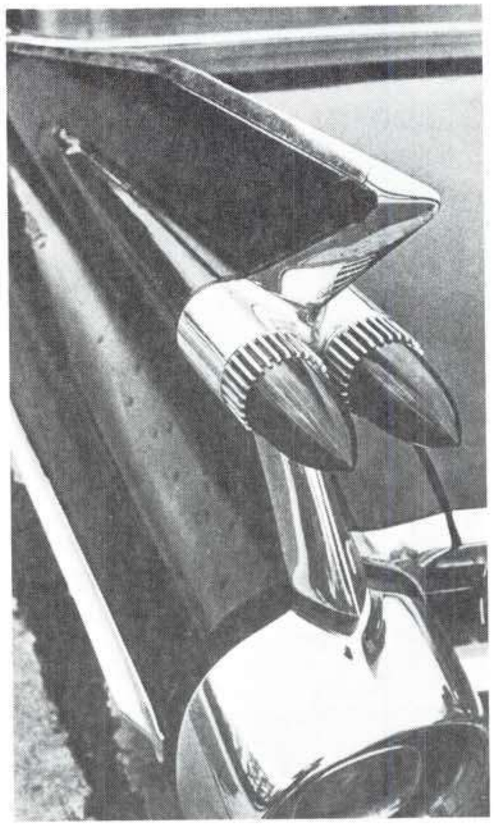
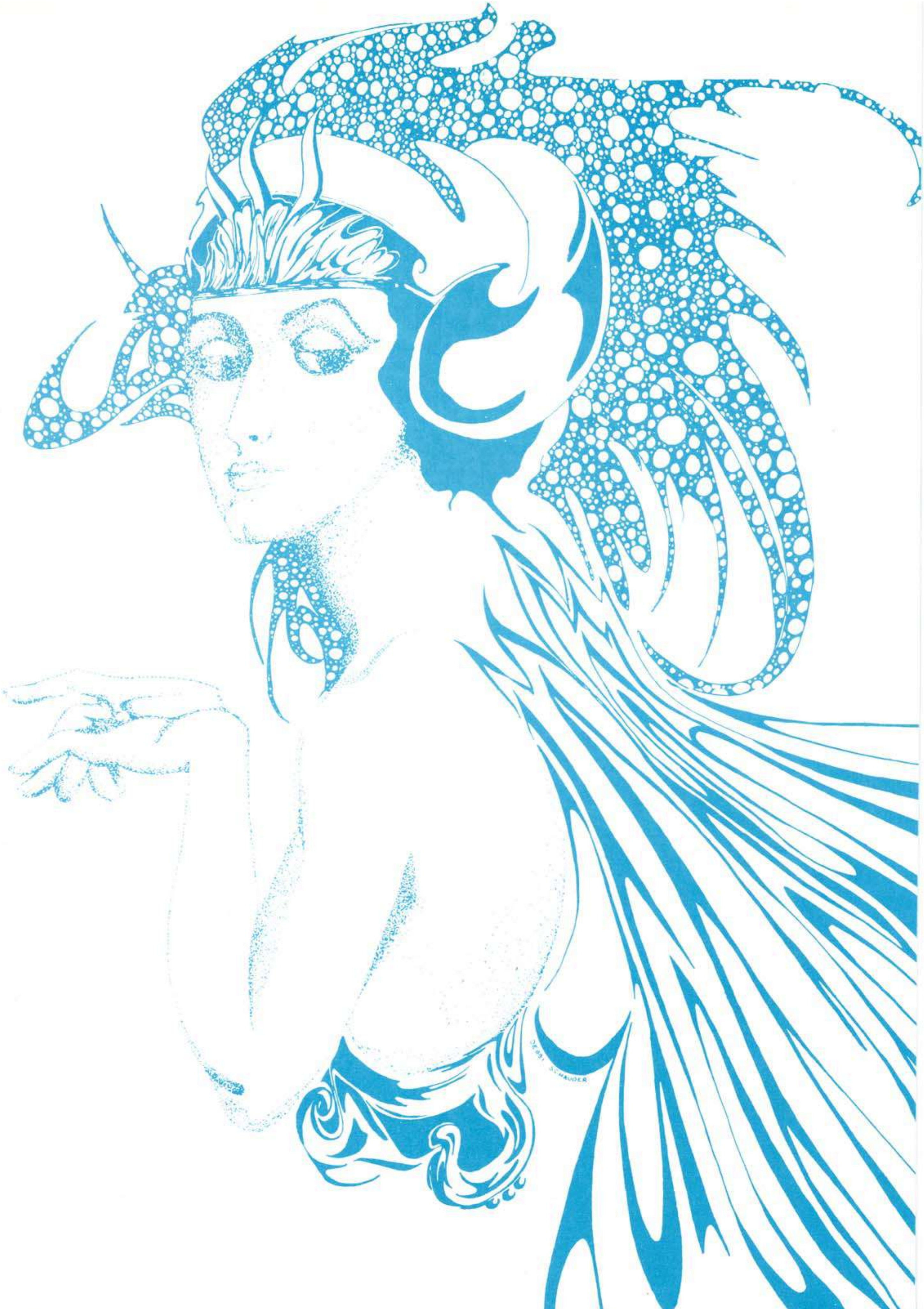
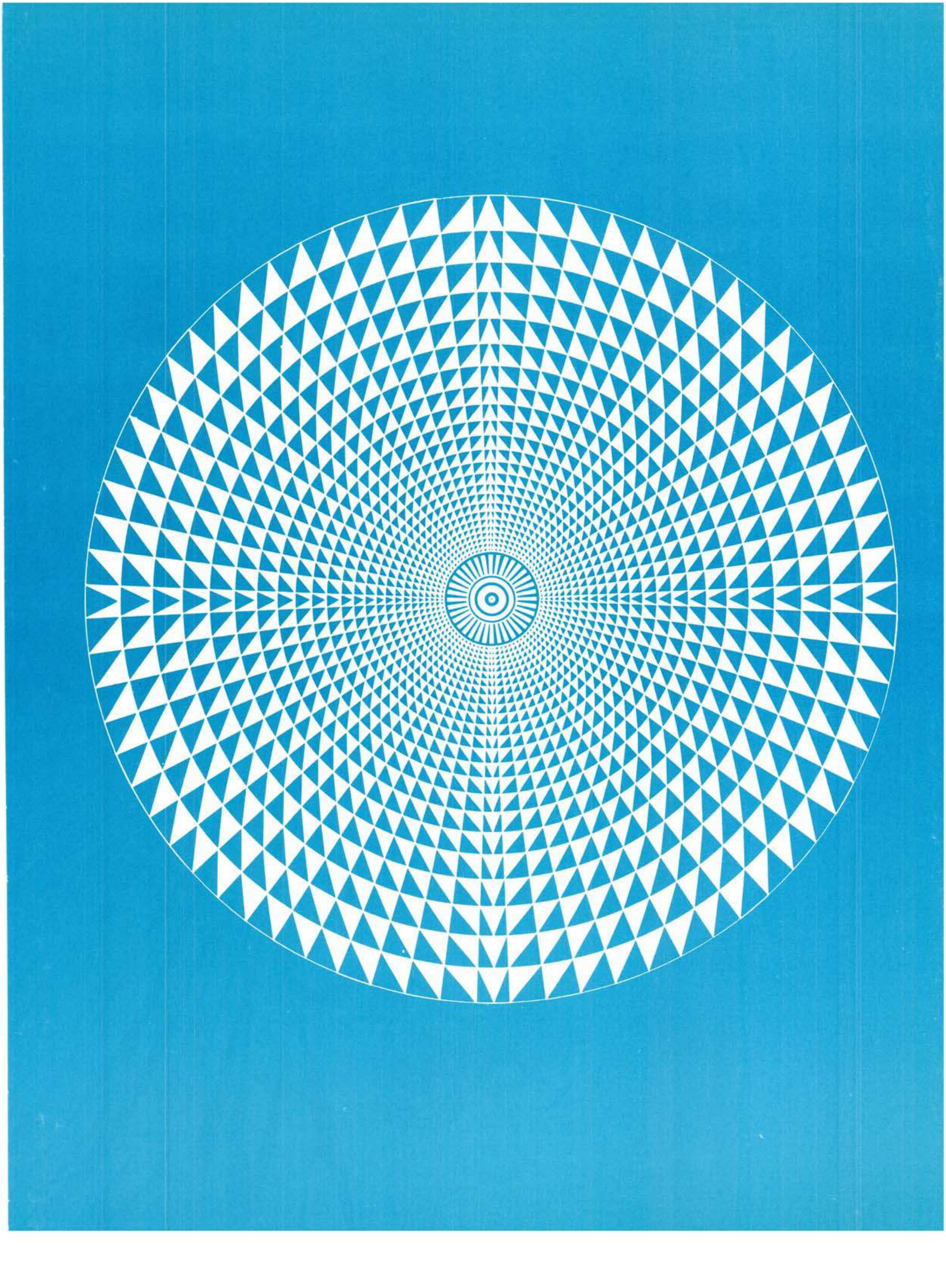



IMPEACHMENT
THE NIXON PAPERS
THIS TIME, VOTE LIKE YOUR WHOLE WORLD DEPENDED ON IT.
The Jury Points A Finger At Nixon
SEAL OF THE PRESIDENT OF THE UNITED STATES







MED3052 Media Events and News Cultures

What is fashion advertising telling us?

Karolina Janicka

M00425177

Whats is fashion advertising telling us?

We are wrapping up your emotions and selling them back to you

Jerry Goodis (1972)

Fashion advertising can often be a branch of photojournalism that might not be created with the portrayal of reality in mind, however more often than not it seems to tap into an aspect of reality so effectively that it can affect the perception of everyone involved in the creation of the image. The blurred line between reality and fashion sparked thoughts about the thought process that goes into releasing a campaign to the world that is potentially problematic. Having a background in fashion advertising and marketing I myself am very conscious of what message a certain picture is portraying even if it a simple Instagram post. Therefore I wanted to look into big scale fashion understanding and try to get a glimpse of what thought process happens behind offensive and controversial adverts that end up seeing the light.

Having discussed photography and the portrayal of reality in class, the campaigns released by United Colour of Bennetton in the 90's got me thinking to how brands visualise their ideas and their controversial campaigns. It seems that something that is obvious to society in an image of a fashion campaign, is not that clear or apparent to the people involved in the creation of said image. It might be a syndrome of "no publicity is bad publicity" which in most cases is, unfortunately, true. Dolce & Gabbana saw a 21% increase in revenue by the end of 2007 (Casley-Hayford, 2015), the year in which the campaign portrayed in 'She's asking for it' was released. But what happens to the ethics? Yes, sales might increase but the black lash and name surely is not worth it. Why do brands either not see or choose to ignore potentially problematic behaviours in their advertising?

In "The Perfect Body' we see the campaign launched by Protein World in 2015 that was all over the London tube a few months before the summer of 2015 as well as all of social media and the news later on. The campaign portrayed a slim, slender and toned model and asked the question “Are you beach body ready?”. In a country where the average size of a woman is 16 (Dahlgreen, 2013) this campaign generated a backlash of women posing in front of the posters in bikini saying that they were ‘beach body ready’ no matter what size they were. The campaign itself brought people to create a change.org campaign that generated more than 70,000 signatures (Baring, 2015) and the adverts ended up being taken down by Transport of London, despite them claiming it did not break its rules (Martinson, 2015). However despite all the backlash in the UK, Protein World’s head of global marketing Richard Staveley stated that the campaign had been brilliant for the company (Sweney, 2015). Taking all of this into account it seems that the brand itself felt no social remorse or obligation to respect the opinions of the public that found the advertisement offensive and insensitive, and decided to instead concentrate on the smaller portion of the public that did not mind a half naked woman with an unrealistic thigh gap telling them to lose weight on their daily commute to work.

Following up with the modelling industry I selected an image for “The Perfect (Role) Model” that I believe illustrates the double standard of fashion towards body shapes and sizes along side the data from The British Association of Model Agents on the standard size and height of a model. Modelling agency Star Models released a campaign titled “You Are Not A Sketch” to fight the unrealistic beauty standards of high fashion with models photoshopped in such way that they would mimic designer’s sketches of clothes. This campaign, although seemingly with a good thought behind it, created mixed reactions to what it was trying to achieve. Although some people agreed that it was a very raw and direct portrayal of the line between reality and fashion having to be drawn it also brought comments of people that were worried it could spark more interest in ‘thinspiration’ and rather bring girls to aspire to look like the sketch portrayed. And it could also be very dangerous for girls and women that already suffer from illnesses like anorexia for whom that reality and fashion line is blurred (Daily Mail, 2013).

After looking at controversial fashion advertising that was directly linked to the difficult relationship our society has with body image and size I followed up with another campaign that brings up the issue of drug abuse, and drug glamorisation in the industry. For this image I chose the controversial ‘Fashion Junkie’ campaign from Bennetton’s sister brand Sisley, released in 2007. In this image two models appear to be ‘snorting’ a white dress. The image is generally problematic not just for the public but for the modelling industry itself, and for any young girls that might potentially consider a career in modelling. In an article for *The Independent* about the tendency of drug abuse in the fashion industry I found quotes that illustrate the struggle of models trying to be the best at what they do and abusing substances such s cocaine in order to achieve it, these quotes were used to surround the image in order to create the contrast of fashion and reality. It listed the case of model Gia Carangi who despite being a very successful fashion model and named on of the first supermodels (*The Independent*, 2005) became addicted to heroin and died at the age of 26. As well as quotes from models and fashion industry insiders that have either witnessed or experienced drug abuse. I believe it to be powerful put against the image as the struggle these people spoke about takes away all the ‘glamour’ that this campaign might be injecting into drug abuse.

The fashion industry seems also plagued with a very ‘ambitious’ attitude towards over-sexualization and rape. It was used as a ‘fantasy’ tool for the 2007 Dolce & Gabbana campaign in which a woman is portrayed by a poolside surrounded by men looking at her and the man that is holding her against the floor. Using this campaign I wanted to portray the complicated attitudes of “She’s asking for it” and other common sentences that victim of rape hear whenever they speak out about the crime committed against them. The designer Stefano Gabbana himself defended the campaign saying it is “an erotic dream, a sexual game” (Drohan, 2014) but this brings up even more issues rather than explaining the reasoning behind this campaign. In a society were victims of rape are constantly blamed for the crimes committed against them to glorify and sexualise such a crime is very dangerous, it portrays an attitude where rape is okay as long as it is fulfilling a sexual dream of fantasy. With this in mind I wanted to surround the image with sentences that are often heard in the media and within the authorities when speaking out about rape.

Having covered, body image issues, rape and over sexualisation and drug abuse glamorisation I wanted tot tackle the issue of racism which is as present in fashion as it is in our daily lives. One of the biggest racist ‘trends’ in fashion seemed to be the ‘black face’ where white models are painted black in order to portray black characters created for the campaign. One of the biggest offender seems to be the fashion magazine Vogue, and not only on one occasion or in one of the international publications. We discussed in class the 2009 French Vogue spread in which Dutch model Lara Stone was painted black in order to portray a black woman in one of their fashion spreads (Davies, 2009). I chose to use the image of Netherlands Vogue from a spread published in May 2013 which used model Quenelle Jansen styled in Louis Vuitton designs portraying the inspiration behind the outfits, Josephine Baker and Grace Jones, two black women. In order to illustrate how easy it would be to have cast a black model for this photoshoot I quickly and easily googled names of black models a pulled them into a list around the image. By no means is my list complete but I was trying to illustrate how easy it is for a normal person to find black models in order to make it clear that it is not problematic for magazines to find them either, they probably have a more direct and easy way of connecting them as well. But this trend to ignore black women in the fashion industry seems a problem that has been going on for some time, and people haven't figured out a solution yet. It is not only in magazines or advertising campaigns but also on catwalks were some brands have exclusively ‘white catwalks’ (Mansey and Merry, 2014) therefore not appealing to their culturally diverse clients.

It was an interesting experiment to look through fashion campaigns that had been released to the public and instantly received a backlash. Thanks to my background in fashion marketing I didn't have much difficulty with the research part of this project and found it rather interesting and educating to put together. It made me think about the people involved in the process and how much they ignore issues in that are present in the every day of society. Despite fashion wanting to draw a line between itself and reality it more than affects reality, and it has the power to shape and change it. It was interesting to see how these advertisements often brought a sort of social responsibility or even social awakening and brought to light issues that the fashion industry can now work on tackling. However a common attitude present within companies that have released these advertisements is that being talked about for the wrong reasons is better than not being talked about at all, which can be damaging to debates about issues of anorexia, rape and drug abuse. But it is clear that it is in the hands of the recipients of these advertisements to call out the companies and bring the need for change to the table.

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CHAPTER

THE MARKETING OF FASHION 30

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LEARNING OBJECTIVES

At the end of this chapter, you should be able to:

- Understand the function of marketing
- Describe the marketing mix
- Explain traditional and new technology media channels
- Understand the value of trends and fashion forecasting
- Understand and use key terminology

30.1 INTRODUCTION

The textile and fashion industry contributes to global and national economies through the purchasing of clothing. How do fashion designers and retailers decide what they will design? How do they know what will sell? The design development process is symbiotic with the marketing process and intelligence data of all kinds are gathered during the process to make sure that there is a market – a consumer, for the product. Here the process is explored in detail and with reference to new technologies as new ways of marketing fashion.

30.2 WHAT IS MARKETING?

Marketing requires a company to think about the customer or potential customer of a particular product. The product needs to fit in with the needs and lifestyle of the customer and generate repeat purchases of the product by that customer. The need to make money is absolutely key.

Marketers achieve this by using a range of 'traditional' approaches, for example, by using market researchers to gather 'intelligence' material and by the advertising of the product. Less obvious approaches are through the 'branding' of the product, the development of the product, the pricing of the product, the promotion of the product, the future possibilities of the product through forecasting and the distribution of the product (Easey, 2009).

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30.2.1 THE FOUR P'S: PRODUCT, PRICE, PLACE AND PROMOTION

Marketing was described by James Culliton in 1948 as a 'mixer of ingredients' – which could help to achieve a recipe for success. E. Jerome McCarthy moved this on to invent the 'Four P' concept in 1960 as being the main ingredients in the mix, and this concept is shared broadly in textbooks about marketing.

The four P's are **PRODUCT**, **PRICE**, **PLACE** and **PROMOTION** (http://www.marketingteacher.com/lesson-store/lesson-marketing-mix.html 02/08/11).

There have been further developments of the marketing mix – known as the extended marketing mix, which involves three more P's. These are People, Process and Physical evidence: firstly, People, this would be people who are involved with the consumption of the product; the consumers/customers, what level of the market is the product aimed at and what demographics do the customers share? Secondly, Process, the process of how the product reaches the consumer from concept to realisation and thirdly, Physical, the physical evidence should include the satisfaction of the customer with the product through feedback from the customer.

Markets have developed in recent times, with consumers becoming much more sophisticated, moving from 'homogenised' markets to what became known as 'niche' markets.

Niche markets are markets that supply 'specialist' products to a smaller, specific, target audience. The product focus may be on quality, exclusivity or function, or all of these, but here the product provides a specific need that fits in with the lifestyle of the consumer.

30.2.2 THE FOUR C'S: CONSUMER, COST, CONVENIENCE AND COMMUNICATION

In 1993, Robert F. Lauterborn suggested a Four C's classification to the marketing mix, which is much more consumer oriented and suits 'niche' market development. These four being, firstly, the **CONSUMER**, that is, satisfying the needs of the consumer through regular reference to them through development of the product. Secondly, **COST**, elaborating on the Price by adding consumer ownership and the extension of brand values of the product, such as environmental and sustainability issues. Thirdly, **CONVENIENCE** replaces Place, in terms of locating the product, the ease of finding out information about the product and purchasing the product. Finally, **COMMUNICATION** replaces Promotion by using new technologies to communicate, before and after purchase, with the consumer, through online selling, targeted banner ads, search engine optimisation, pay per click, social media networks, viral marketing and games, videos and email (http://www.customfitfocus.com/marketing-1.htm 03/08/11).

30.3 THE MARKETING OF FASHION

In this 'marketing of fashion' context, the 'consumer product' is the garment or accessory that has been developed by a designer with reference to marketing information. The fashion product allows for a variety of marketing methods to be used and because it is very varied with different customers, different lifestyles, needs and uses, the fashion marketer needs to make a number of informed decisions. These decisions begin with the creation of the product (see Figure 30.1). Design research is undertaken to explore the shape, colour, texture, form and function of the product; also the fashion element is explored – making the product contemporary and desirable so that it fits in with customer

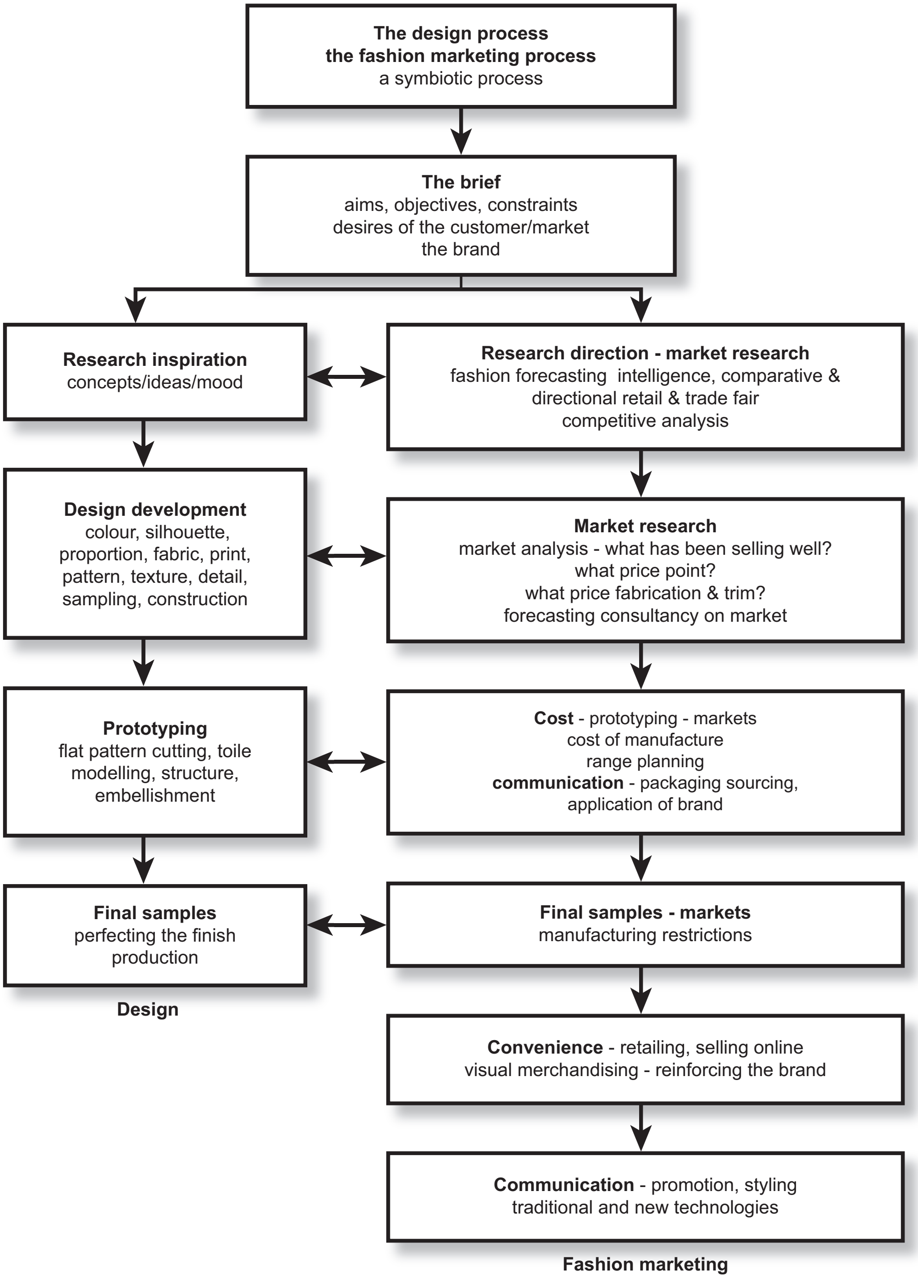

FIGURE 30.1

This chart shows the symbiotic relationship between the fashion design process and fashion marketing.

Source: Created by the author.

needs. Intelligence material is gathered from forecasting publications, retail reports that may be comparative (looking at the same type of product in the shops and comparing fabrication, price points, construction, detail and colour) or directional (looking at new and different products, new directions, new fabric technology, new fashion trends) and other inspirational research material such as cultural and artistic influences (McKelvey & Munslow, 2011).

30.3.1 PRODUCT DEVELOPMENT

Once development has begun then the 'cost' of the product needs to be determined, this is very much dependent upon the following:

- Fabric
- Amount of fabric used
- Trim
- Detail
- Construction complexity
- The market level at which the product will be placed
- Broader issues such as the source of the fabric and the ethical manufacture of the product

30.3.2 RETAILING SPACE

The 'convenient availability' of the product is where it will retail, be it virtually or in bricks and mortar, also referred to as the 'distribution channel'. This may well be where the brand is reinforced in the interior decoration of a store, creating the right mood for its customers. Or, it could be the ease of locating the product online, finding out about its provenance and choosing from a number of delivery options.

30.3.3 COMMUNICATION OF THE PRODUCT

Possibly the broadest area of activity is the 'communication' of the product, which could involve advertising, public relations, word of mouth, sales promotions, further communication with the customer via email and social networking. Advertising the product might involve paying for a television advertising campaign, running a photographic styling shoot to use images in print-based media like newspapers and magazines and on ambient media like billboards.

30.3.4 PUBLIC RELATIONS

Public relations work involves producing press releases and photographic styled images to 'sell' the product or collection to the right customers in the right magazines or newspapers. 'Word of mouth' relies on the satisfied customer spreading the word about the product, and these days this is achieved very successfully through social networking sites. Sales promotion uses strategies like reducing the price of a popular product to encourage the purchase of other products sitting alongside, or customers accumulate rewards points to put towards their next purchase.

30.4 TARGETING A MARKET

Markets can be 'mass' (an overwhelming group of consumers who may use the same household product for example) and homogenised (to make uniform or similar) involving consumers with similar needs and wants. A heterogeneous market (composed of widely dissimilar elements) consists of consumers with diverse needs and wants (Bovee & Thill, 1992).

As 'niche' markets (where there is demand, by the consumer, for a very specialised product) are now frequently targeted there is a necessity to identify 'gaps' or 'opportunities' for a new designer or manufacturer. The market needs to be able to be 'identified', in that it needs to be understood and reached by any marketing message or distribution channel. To achieve a better understanding of this, the tools of segmentation (sub-division of the mass market, for example, for better targeting) and demographics (the statistical data of a population such as the average age or income) are used (Easey, 2009; Jackson & Shaw, 2001).

Geographic Segmentation: This can refer to country regions, city centres or the effect of weather. Fashion is traditionally organised by season, but weather patterns at a given time of year, in holiday regions, for example, will have a strong bearing on the type of clothing required.

Psychographic Segmentation: Here lifestyles are explored, that is, the individual's pattern for living, is expressed through activities, interests and opinions.

Demographic Segmentation: This can refer to gender, occupation, marital status, income, wealth, education, religion, age, size, height, youth subcultures, life-stage of the family, neighbourhood, region, country and climate.

Behavioural Segmentation: The final use of the product, brand loyalty, consumer needs for certain benefits and price sensitivity are considerations here.

Socio-economic Classification: This is considered quite an old system now as it is based on class, but does allow for broad judgements based on occupations and often is used as a reference to the lifestyle of the consumer. See Figure 30.2.

Nowadays, being 'fashionable' has nothing to do with class.

A	**Upper class**	*Senior professional*
B	**Middle class**	*Managerial*
C1	**Lower middle class**	*Supervisors, junior management*
C2	**Skilled working class**	*Skilled manual workers*
D	**Working class**	*Semi/unskilled manual workers*
E	**Subsistence level - low fixed income**	*Pensioners, students, the unemployed*

FIGURE 30.2

Socio-economic classifications.

30.4.1 CUSTOMER PROFILES

These are also known as pen profiles and personas. These can take into account a number of possibilities and tend to tell a story about a potential consumer, analysing lifestyles, attitude, occasion of use for a product, income, age and any other defining characteristics. This tool helps to target advertising and marketing to these potential consumers and so cuts costs. See Customer Profile examples in the Evolution and Stratagem Case studies later in the chapter.

30.4.2 SEASONAL AND OCCASION MARKETS

The traditional spring/summer and autumn/winter fashion seasons have developed into new opportunities such as early spring, spring, early summer, summer sale, high summer, transitional summer, autumn, party wear, Christmas and winter sale. There are a number of reasons for these opportunities, such as climate change and a need for a versatile, perhaps layered wardrobe, many more opportunities to travel abroad and more collections to tempt the consumer whilst waiting for the main season.

Holidays, calendar events, leisure and activities, back to school and weddings all provide further marketing opportunities.

30.5 BRANDING

Branding allows the consumer to differentiate between different products. The brand targets particular consumers.

A brand is a mixture of a number of attributes, many intangible; that is, they are perceived and discerned. Usually these are recognised in a logo or icon forming a trademark – this is the brand identity and allows the consumer to recognise one brand's differentiation from another. Differentiation comes from 'values' that can be built into the brand, these are usually related to human personality traits, such as warmth and reliability, so that consumers can understand exactly what kind of experience they can expect from using a particular product or service (http://www.brandchannel.com/ 18/10/10).

Without branding it is difficult to know how you might market a product or service.

Branding is important in getting your target market to see that you are the only brand that can provide the right solution to their needs, so that you can build loyalty to the brand and, of course, repeat sales.

30.5.1 BRANDING CASE STUDY: APPLE INC.

An example of a well-known brand is Apple who compete in the highly competitive markets of personal computing and the consumer electronics industry and are the largest mobile devices company in the world. The brand is synonymous now with innovation in the form of the iMac and Macbook computers, the iPod, iPhone, iPad, iTunes and applications for these. The Apple brand is about lifestyle; imagination; liberty regained; innovation; passion; hopes, dreams and aspirations and power to the people through technology. These products develop a highly relevant and desirable brand image in the mind of the consumer that they have not previously reached and also promote strong brand loyalty from the consumers that have bought Apple products in the past. Apple prides itself on being a humanistic company with customer experience as its focus. (Marketing Minds, http://www.marketingminds.com.au/branding/apple_branding_strategy.html 03/08/11).

30.6 THE TRADITIONAL MEDIA CHANNELS

With brand values (such human traits as warmth and reliability applied to the product identity) it is easier to work with each element of the promotional mix; the effect will be stronger and will last longer when the 'handwriting' (the visual identity of the brand in the form of a logo and its application) is consistent every time it is used across a variety of media, such as advertisements, on the web, in a store, on the letterhead. It becomes distinctive and is recognisable, it is reinforced in the mind of the consumer and ultimately becomes easier to recall (Easey, 2009).

The traditional channels for promoting products and services are as follows:

Television – This is the most expensive method of advertising, there are many television channels these days with particular markets in mind. Adverts are short though, so there is a limit to how much information can be conveyed, but this is a good medium for consolidating a brand image.

Outdoor advertising – This is known as ambient media and includes billboards, the Underground and other transport systems, street furniture and taxis. This is relatively inexpensive and can target more closely particular users of transport, but it doesn't give much opportunity for lots of information.

Magazine advertising – This is quite an effective, if static, medium as magazines tend to be aimed at a target market in any case. Magazines are often kept for months which means repeat exposure and may lead to sales, there is also the 'pass-along' value to like-minded consumers. However, magazines do tend to require higher production costs and there is limited flexibility in terms of placement of an advertisement.

Celebrity and focussed publications – The 'cult' of celebrity has had an impact on the fashion marketing mix. Celebrity endorsement and sponsorship is a very powerful form of promotion. Having links to the brand with a well-known personality helps to add credibility. An admired celebrity brings their traits of good taste to the brand. Even though they have been paid, if they use the brand it strengthens the brand values. If the celebrity does something damaging in their career, this can have an adverse affect on the brand. Sports brands, in particular, have been very successful in the use of celebrities such as David Beckham.

Radio Advertising – This is not often used by the fashion industry due to the limitations in communicating information as this is obviously not a visual medium, although alerts to sales and events do work.

Sales promotion – This relies on offering discounts on products, or the use of coupons and vouchers, which may then help to convert customers to being brand loyal. Customers may become accustomed to sales if this tool is used too frequently and may not buy at other times. This could also hurt the brand image.

Public relations – These may be in-house or external companies employed to get the brand message across, through launches, parties and events. How they communicate the brand is key, also what response do such events get from the press? Mentioning a product in the press often gives immediate legitimacy. The right public relations company will have strong relationships with press and other media, the wrong one will waste time and money by not getting the brand message across in the right medium.

Personal selling – The knowledgeable sales assistant helps to reinforce the brand. The one-to-one feedback is powerful in personal selling but relies on trust that the assistant will have the customer's best interest at heart.

Direct marketing – This involves mail-outs to targeted customers. This may target the right customer but, as unsolicited mail, may just end up in the waste bin without being read.

30.7 NEW TECHNOLOGIES AS MEDIA CHANNELS

The Internet has become a powerful tool for selling, promoting and feeding back consumer opinion. A full range of products can be reviewed and compared at any time of day and night, products that are normally out of reach in another country can now be purchased and delivered to the customer's door in a very reasonable time frame. Search engines such as Google, one of the best known brands on the Internet, can help to find any product using key words for searching, as well as such sites as the purpose-built product comparison site, Kelkoo, founded in France in 1999. It provides information on products including seller information and price.

Ebay is an American online auction site that is a consumer to consumer business, where a broad range of products and services are bought and sold by businesses and ordinary people and feedback is sought on products and services received, with a view to constantly improving the shopping experience.

The Internet is constantly updating and improving from an original information-based retrieval system to a fully interactive experience, which can also be accessed by a number of devices, such as desktop and laptop computers and tablet computers such as the iPad, mobile devices such as the iPhone and entertainment systems such as the iPod, PSP (Play Station Portable) and Xbox 360. Entertainment can be found by 'surfing' the Internet, downloading music and videos, playing games and downloading entertainment, promotion and information applications. Social networking has also become a popular online pursuit where individuals and organisations connect to each other through interdependency such as friendship, common interest, likes and dislikes, beliefs or knowledge. One of the best known social networking sites is Facebook, where an individual creates a personal profile made available to 'friends' and where friends exchange messages and join common interest groups. Facebook is accessible on any personal computer and on mobile devices such as smartphones, that is mobile phones that combine cameras, media players, touchscreens, Global Positioning System (GPS) navigation, mobile broadband and Wi-Fi.

30.7.1 WEB 2.0 AND OTHER TECHNOLOGICAL DEVELOPMENTS

The expression Web 2.0 is broadly meant to encompass a combination of new technologies (Javascript tools like AJAX) and interaction from the user. The user can be an amateur writer or developer who democratically contributes information and applications freely, and is as credible as traditional written sources and commercial software.

Web 2.0 provides opportunities for users to collaborate with each other online by sharing and interacting with information in what is known as a 'social media dialogue', as creators of user-generated content in a virtual community, in contrast to the passive viewing of content that was created for them (Oreilly http://oreilly.com/web2/archive/what-is-web-20.html). Characteristics such as openness, freedom and collective intelligence are key to Web 2.0.

Examples of such opportunities are social networking sites, like Facebook, wikis like Wikipedia that are editable and extend information that can be 'done' and 'undone', blogs that are personal commentary sites including text, visuals and video, video-sharing sites like YouTube and Vimeo, the ability to 'tag' photographs and text and to use 'extensions' where the web becomes an application platform and document server such as the use of Adobe Flash Player, Adobe Reader, Java, Quicktime and Windows Media Player.

This participatory virtual community also has a 'sharing' phenomenon, which is often free to anyone who wants to contribute, for example, tutorials on using software, software and source code are shared, material on any subject is available for use.

30.7.1.1 Creative Commons

Creative Commons is a non-profit-making organisation that wishes to increase sharing and collaboration legally on the web. Their mantra is 'share, remix, reuse – legally' to fulfil the full potential of the Internet! They release copyright licenses known as Creative Commons licenses to the public free of charge. The licenses allow creators to decide which rights they reserve instead of the default 'all-rights reserved copyright' that was designed pre-Internet. For more information about this initiative visit http://creativecommons.org/about.

30.7.1.2 Facebook

Facebook is what is known as a social networking site, which allows users and companies to create a profile that can be seen online, users can leave 'status' messages and communicate with each other in statements and brief comments. Users can join groups where they have common 'likes'. Companies can leave information about new fashion lines, events and sales. They can pay to advertise on Facebook by closely targeting their customers in banner ads and other smaller adverts. Users can play games and view new content from companies.

30.7.1.3 Twitter

Twitter is a communication platform increasingly used by companies to connect with their customers, as well as individuals and celebrities. There are opportunities to share company information and gather market intelligence that could be invaluable in building relationships and loyalty with customers. Customers can feed back about products that were satisfactory or disappointing, can offer ideas to companies about improvement and can, in return, be informed about special offers, coupon codes can be provided, links to key information or new events can be given, online shopping tips can be shared. Tweets are easy to read at up to 140 characters and offer a 'real time' method of communication.

It is the level of information that makes this useful; for example, it is easy to pass on information about some small defect in a product that would not normally warrant a complaint. It can make the customer feel close to the brand and feel that they are being heard, therefore increasing brand loyalty.

30.7.1.4 Instant messaging

Instant messaging also provides opportunities to inform customers about products, events and 'good deals'. It is a 'non-confrontational' method of promoting, as it is text based and is usually in response to some request from the recipient to receive information. Mobile phones and devices are hugely popular and this is an effective way of informing target markets.

30.7.1.5 Virals

This is the electronic equivalent of 'word of mouth'; an online film or message is created and is designed to be entertaining enough for customers to pass to each other, often through YouTube and email. Therefore making others aware of the brand, at no cost, but at great circulation speed.

30.7.1.6 Blogs

Most blogs (**web logs**) are privately generated and have various uses including showing personal online diaries, sketches, links and videos, but some are developed by companies; these may be developed for branding, marketing and pubic relations.

Blogs are web pages generated by 'users' and published for anyone to see. They are of a simplistic, linear construction and tend to run from oldest to newest postings.

30.7.1.7 YouTube

YouTube is famed for allowing users to post videos online, sharing them so that they can be viewed across the world. A huge range of videos are available to view including virals!

30.7.1.8 Podcast and webcast

A podcast is a series of digital media files that can be downloaded whenever they are posted.

A webcast can be a live or on demand file that uses 'streaming' media technology.

30.7.1.9 Email

Electronic mail or email is ubiquitous nowadays and as well as being a generally informal communication device is also a selling and promotional medium. Free subscriptions to newsletters and Websites allow the recipient to remain up-to-date with developments to their favourite brands. Email may also be the container for viral videos and other marketing material that can be attached for download, and links to Websites can also be contained within the message.

30.7.1.10 Flickr

Flickr hosts an online community that encourages users to share photography and video. The site is used widely by bloggers to host images that are embedded in their blogs and other social media, thereby spreading information. Flickr has an application for the iPhone, Windows 7 phone and the Blackberry.

30.7.1.11 QR codes

QR code is an abbreviation of quick response code and is a two-dimensional barcode that is readable by barcode readers and mobile phone cameras. The code is a square of white with black units (see Figure 30.3). This could hold text, a URL or other information. Users with a camera phone and the correct reader application can scan the codes to get information or go directly to a Website. The technology is ubiquitous in Japan, the Netherlands and South Korea. Applications for reading the code are available for most smartphones.

Personal QR codes can be generated for free and shared. One particular Website is http://delivr.com/qr-code-generator and it generated the QR code shown in Figure 30.3, which is the URL for the author's illustration blog.

30.7.1.12 iPhone and Android smartphones

The iPhone was one of the first mobile phones to be mainly controlled through a multi-touch interface by a touchscreen and can be considered a smartphone.

The App Store can deliver applications directly to the iPhone or iPod Touch over Wi-Fi or cellular networks without requiring a PC. iPhone 4 includes a 960×640 pixel display with a pixel

FIGURE 30.3

Example of a QR code.

density of 326 pixels per inch, a 5 megapixel camera with LED flash capable of recording HD video, a front-facing VGA camera for videoconferencing. This makes it a very versatile and tactile tool. Competition exists from the Android operating system for smartphones, which was released in 2008. Android is an open-source platform supported by Google, along with major developers, such as Intel, Motorola and Samsung; they form the Open Handset Alliance. The software suite included on the Android phone consists of Google Maps, Calendar, Gmail and a full HTML web browser.

30.7.1.13 Apps

Apps or applications can be downloaded from App stores for smartphones. The first App store was for Apple's iPhone. Third-party applications were made available for download, which added considerably to the choice of applications for nominal sums. Applications cover anything from games, entertainment, utilities, social networking, music, productivity, lifestyle, reference, travel, sports, navigation, health and fitness, news, photography, finance, business, education, weather, books and medical and offer great opportunities for promotion. For example, the free All Saints application allows users to shop the full collection with new styles uploaded daily; to search for specific pieces; to create a wish list; to share products with friends via email; to locate the nearest stores to your position using GPS and updates the latest content automatically.

There follows a brief case study of Wickedweb Digital marketing agency, and they use new technologies and social networking as marketing tools. They are responsible for All Saint's marketing strategy, which is discussed in more detail in Case Study 3: All Saints of Spitalfields.

30.7.2 CASE STUDY: WICKEDWEB DIGITAL MARKETING AGENCY

Wickedweb is a web marketing company that sets out to 'build engaging relationships between brands and their audiences using digital communications', they are 'digital marketers' (http://www.wickedweb.co.uk 15/10/10).

They use social media marketing strategies to help companies to improve their brand awareness and loyalty and the sales of product, for example, Facebook, YouTube and Twitter.

The ‘conversational’ styles of social networking help to break down barriers and build brand perception and loyalty.

Audio and video tools (YouTube), online radio, photographic tools, podcasts and 11webcasts can all help to improve brand loyalty and are utilised by Wickedweb.

Niche markets might require different social networks to communicate; there are many networks on the web to choose from, and Wickedweb could even build a specific network and provide complete management of a company’s online presence.

As social networking is a popular tool with millions of users, how does a company make their voice heard? Their solution is to be an expert in the field, so when users can comment, add their own voice, express themselves and share web links, hints and tips on a community site it all helps to improve customer loyalty.

Wickedweb also develops mobile applications for the iPhone that support social networks, provide relevant games, sometimes viral games and information applications that support the brand.

Social networking can attract all kinds of users, so how do you know that you are targeting the right customers? Wickedweb can provide a range of tools that analyse and report on keywords used, target potential customers by similar demographics, the location of customers and positive and negative commentary.

They worked with All Saints of Spitalfields to improve their brand awareness online.

30.8 THE MARKETING PLAN

The marketing mix of consumer, cost, convenience and communication will be used here. A mixture of traditional and new technology marketing methods will be included in a context that relates to two particular fashion concepts.

There follows two case studies exploring the process of the marketing of fashion, one is a womenswear orientated project, the other is menswear; they have different approaches to communication but both show strongly how the ‘concept and consumer’ is key to creative solutions in the marketing mix.

Both projects follow a process of market research, specifically about the consumer and the target market, competitive analysis, customer profiles, conceptual development, the ‘critical path’ for achieving the objectives of ‘from concept to realisation and promotion’, cost, convenience, communication, the traditional marketing approach and the technological marketing approach.

Design development works in tandem with this process.

30.8.1 CASE STUDY 1: ‘EVOLUTION’ BY KATIE LAY

‘A case study to support the evolution of an “Urban-wear” women’s-wear collection, which integrates influences from the latest technological advancements with shapes and details inspired by the beauty of nature in the world around us…’ (Excerpt from Katie’s Marketing Plan; Lay, 2010a).

Market research: Katie’s primary objective was to blend the performance and flexibility of sportswear with designs drawn from nature in order to create a practical, comfortable and fashionable range that provided practical solutions to the problems facing the target market. She then organised her thoughts into secondary objectives to undertake her research (Lay, 2010b):

- Use the Internet, library and magazines to thoroughly research the latest urban-wear designs.
- Gather opinion regarding the current understanding of the style by issuing a questionnaire to a significant group of people taken from the proposed target market, using hand filled, email and Facebook.
- Analyse opinions gathered from the returned questionnaires and evaluate the potential for an expanded range of garments.
- Use a number of modes to research current designers in order to understand their thoughts on current and future trends for the introduction of new technologies.
- Understand how new technologies have already been used to influence and direct fashion trends.
- Research new technologies, materials and production methods that could be integrated to create the new look and feel.
- Study aspects of the natural world and extract potential shapes, colours and themes that could be integrated to complement the new look and feel.
- Prepare a number of examples of potential designs and concepts that show how the style can be expanded as proposed for presentation to a focus group.
- Hold a focus group of four people taken from the target market to discuss the proposed integration of themes taken from technology and nature.
- Analyse the feedback from the focus group to determine which ideas received most favourable feedback and should be studied further.

30.8.1.1 Consumer

The Concept

'Evolution' is a new range of 'active-wear' garments, which elaborates on a trend of crossovers between casual, sport and high fashion. This comfortable, wearable range is sophisticated, modern and stylish. The uniqueness of the range is the ability to remove panels and sections from the 'casual' outfit for a transition to 'performance-wear'! The range is aimed at women aged between 18 and 30 who are fashionable and have a strong identity, who desire practical yet stylish clothing.

Second skin-like styling combines with organic, naturalistic patterns and neoprene, high stretch elastane and bonded jersey with contour panelling, with accents in contrast piping and sheer mesh inlays. Quickburst zippers will be used to fit in with the easy-to-remove panel function.

A range of machine-inspired greys with contrasting soft tones emphasises the sophisticated sports-wear approach, the fabrics offer high-tech to body-forming solutions. The digital prints are inspired by 'beetles' because of their sleek organic shaping, which fulfils the beauty of nature element (Figures 30.4 and 30.5).

Katie makes her marketing objectives explicit: to design an active lifestyle collection; to study the range of garments offered by major competitors in order to identify niche market areas that are not currently met; to establish realistic price points to attract the target market; to identify potential selling strategies such as where, when and how; to design a unique marketing strategy for the Evolution brand.

The Target Market

A number of 'customer profiles' are created that help to expand the 'target market'; this gives ideas about when and where the collection may be worn and helps to see unforeseen opportunities in developing the range. An analysis of the person's salary, socio-economic class, disposable income after bills,

FIGURE 30.4

Part of the collection – Evolution.

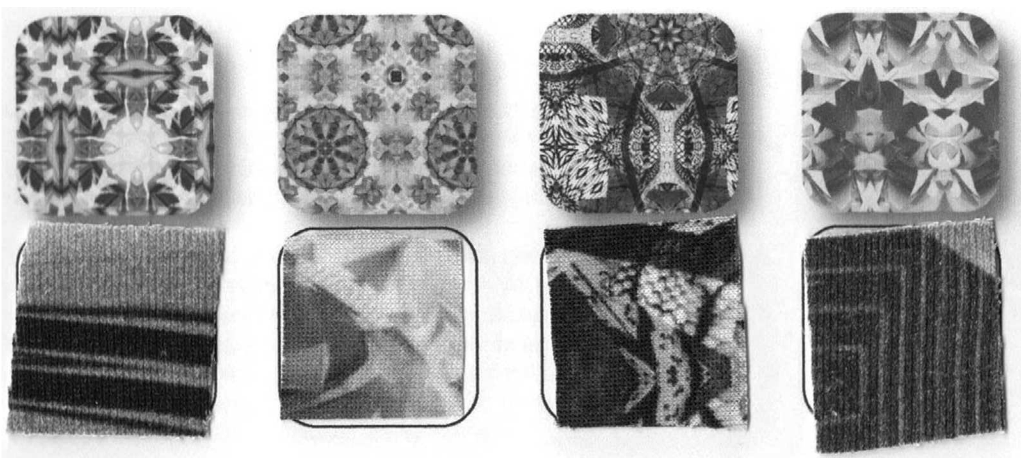

FIGURE 30.5

The print-based fabric story for Evolution.

wardrobe update allowance, dress size and age is provided. This is followed by a paragraph offering more detail about the lifestyle of the persona.

Competitive Analysis

Usually competitors are attracting the same or similar target markets. Analysis is about understanding what a competitor is developing and how they are reacting to change. This is done by observing and recording the competitor's products and comparing colour, shape, texture, fabrication, price and manufacture in the form of a visual report. It may also help a company to reaffirm what makes them different in terms of their brand message.

The concept requires Katie to look at sportswear and fashion brands, as her collection is a synthesis of the two areas.

Sportswear – Nike

Nike sportswear ranges from the professional to the serious amateur and targets 18–35 year olds. Men, women and children are catered for. The goal is to enhance performance when wearing Nike products. Nike's promotions are diverse and well known, using athletes like Ian Botham, Sebastian Coe, Ronaldo and the England rugby team. Nike innovations include the Triax running watch, which offers a more usable watch with numbers that are readable and buttons that are easily utilised. Nike+ monitors a runner's performance through a radio device in the shoe, which works with the iPod Nano, in collaboration with Apple. They also developed the FIT system, a four-fabric system that copes with heat, cold, snow, wind and sweat.

Sportswear – Adidas

Adidas attempts to develop and create experiences that engage customers in a long-lasting association with their brand. The target market is 14–22 years. Adidas is a mass and niche market provider to maximise consumer reach from shoes, apparel and accessories for sports such as football golf, basketball, to training and fitness. Adidas strive to continuously improve the quality, look and feel of their products. They advertise in the media targeting the youth audience as well as the sporty consumer. Adidas uses new technology to communicate their brand from utilising the world's biggest advertising hoarding in Birmingham during the World Cup, to utilising the Internet and through email campaigns. They try and show at least one improvement in a year and innovate through their cutting edge design, for example, their Dynamic Layering Concept clothing range that provides physiological support for football players.

Katie looks at Top Shop contemporary concessions to see where Evolution fits in, in terms of competition. In this context a concession is a retail business within another retail business which operates under a special license, for example, a department store contains many concessions operated by other retailers.

KTZ – Marjan Pejoski and Sasko Bevzoski design cult streetwear with a feminine angle at Top Shop: this collection was fun filled and had a futuristic feel on American retro looks.

Makin Jan Ma – Makin makes stories and scripts and clothes for his characters then shoots the film, his starting point is always 'love': this was a collection available in Top Shop inspired by 'falling in love'.

Evolution: Inspired by the continuous evolution of technology and nature, this collection is multi-functional, fashionable and jam-packed with performance.

AnneSofie Back – a designer whose signature is based on subverting the human form: this collection was women's daywear with a gothic touch.

Unique – the in-house design team produce strong prints, proportion and embellishment pieces: this range was a sporty, laid-back beach collection.

Ashish – printed tee shirt designer at Top Shop: this was a sportswear range with a studded punk influence.

Boutique – capsule collections at Top Shop with directional and essential pieces: this was a fashion forward range with a neutral colour palette.

Jonathan Saunders – a print designer more recently moving into architectural, clean lines: this collection was about urban luxe with geometric shapes and black.

Danielle Scutt – womenswear designer creating feminine, pretty and often colourful collections: this collection was about bright prints and poolside glamour.

Richard Nicoll – womenswear designer renowned for his strong tailoring: this collection was about city chic through corsetry and menswear details.

Customer Profile

See Section 3.1 Customer Profiles – for an explanation of profiles or personas.

Katie created three customer profiles, the Fashionista, the Sporty Student and the PE Teacher. The Fashionista is described here. Each profile would have a slightly different emphasis, the first is about being fashionable, the second is about the relevance of the high-performance fabrics and the third about the versatility of the garments to quickly change looks and function.

The Fashionista customer profile is loosely based on the movie 'The Devil Wears Prada'; contemporary references, from movies or books, are often helpful in elaborating on customer profiles.

The 'Fashionista' who likes to keep fit*.*

'Salary: £27,000

Socio-economic class: B

Disposable income: £200 per week

Wardrobe update allowance: £200–400 per month

Dress size: 10

Age: 25

In London, recent graduate Rebecca has just been hired to work as the assistant to the powerful and sophisticated executive fashion editor of a magazine. With help from her colleagues, Rebecca finds herself learning how to dress more appropriately for her demanding new role. Despite being an assistant and living in the centre of London, splitting bills with her friends leaves Rebecca with limited cash for 'affordable' fashion, but with the demand to be constantly 'in fashion' at work, she is finding it difficult affording to keep her wardrobe fresh and up-to-date. With spare time being an issue, Rebecca likes to go to the gym straight after work, but hates having to carry her active wear with her to the office every day.

How did she hear about Evolution?

As an avid fan of Top Shop, Rebecca's eye was caught by the exciting, edgy new concession in the Oxford Street store one Saturday afternoon. Rebecca was captivated by the concept of being able to go to work in her gym kit and still look great.

Why She loves it…

The Evolution garments tick both of Rebecca's main boxes when it comes to fashion – it is affordable and looks great. Not only that, but it allows her to cut out the endless wasted hours trekking between gym, home, work and play and lets her get on with the precious little social life that she is able to enjoy. Evolution's numerous, adjustable accessories allow her to make-over the same outfit several times without breaking the bank by adding or removing attachments as each new season comes round'.

30.8.1.2 Cost

Katie selected a range of her developed garments to demonstrate her costing method, breakdown of materials and price points.

She decided to calculate wholesale prices first as this was relevant for Top Shop. She then did some market research into competitor's pricing to work out a relevant mark-up price for retail purposes, for the brand to sit well amongst its competitors (Figure 30.6).

Materials included the base fabric, mesh, adhesive for the neoprene seams, vinyl, laser cutting, Quickburst zippers, closed end zippers, vinyl and digital prints. Labour was included and a wholesale mark-up of 25% was added. A further recommended retail mark-up of 70% was added to the total wholesale price as was VAT.

Item	Quantity	Unit cost	Total cost
Cotton jersey	2m	£4.95 per m	£ 9.90
Digital printing	2.5m	£ 5.00	£ 12.50
Vinyl	0.05m	£ 9.95	£ 0.50
YKK quickburst zippers	2	£5	£ 10.00
		Total excluding labour	**£ 32.90**
Labour	0.25 day	£20 per day	£ 5.00
		Total cost price	37.90
		Wholesale mark-up @ 25%	9.48
		Wholesale price (excluding VAT)	£ 47.38
		RRP mark-up @ 70%	£ 33.16
		RRP price excluding VAT	£ 80.54
		VAT @ 17.5%	£ 14.09
		RRP including VAT	**£ 94.63**

Item	Quantity	Unit cost	Total cost
Neoprene	1m	£10 per m	£ 10.00
Mesh	0.5m	£10 per m	£ 5.00
Adhesive	1 tube	£3.99	£ 3.99
Vinyl	0.5m	£ 9.95	£ 4.97
Laser cutting	1m	£ 5.00	£ 5.00
YKK quickburst zippers	2	£5	£10
YKK closed end zippers	2	£4.95	£4.95
YKK centre front zipper	1	£9.95	£9.95
		Total excluding labour	**£ 13.96**
Labour	0.5 day	£40 per day	£20
		Total cost price	£ 23.96
		Wholesale mark-up @ 25%	£ 5.99
		Wholesale price (excluding VAT)	£ 29.95
		RRP mark-up @ 70%	£ 20.97
		RRP price excluding VAT	£ 50.92
		VAT @ 17.5%	£ 8.91
		RRP including VAT	**£ 59.83**

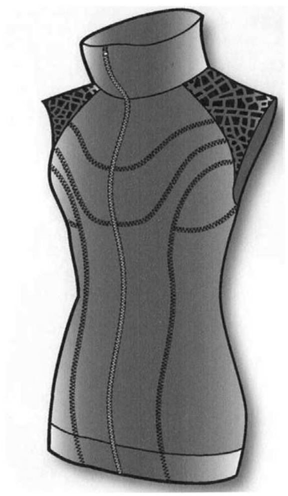

FIGURE 30.6

Two costing sheets for comparison from the Evolution collection.

30.8.1.3 Convenience

The collection would ideally be sold in the Oxford Street Top Shop store in the concessions department. Top Shop is a chain of fashion stores that operates in 20 countries across the world, from Brazil, Canada and the United States across Europe and the Middle East to New Zealand and South East Asia. The flagship store in Oxford Street, London, has a nail bar, a tailoring service, a hair salon and a delivery service delivered by scooter within 1 h of ordering providing that the customer lives in the delivery zone. Top Shop also sells online via its Website www.topshop.co.uk. This would give customers residing outside London the opportunity to buy into the concessions and the Evolution brand.

Top Shop delivers 'basics' to 'edgy trend setting' garments and does not categorise its customer, but relies on its brand values to keep customers. Top Shop has a reputation for supporting new talented young designers. The Top Shop marketing mix is about advertising, word of mouth, constant change in the flagship store and sponsoring of talented designers, which maintains interest with customers in the brand.

The advantage of Evolution being a concession in Top Shop would be low start-up costs, exposure to the right customers and an opportunity to try new and edgy ideas.

As a concession, Evolution would establish its identity by being circled by interactive screens; the screens would allow the customer to choose garments from a revolving hidden rail. The garments would be in 3D and full colour on screen, and garments could be mixed and matched onscreen to create outfits. Once selected, garments would be delivered to the customer and payment could also be made onscreen.

The interactive shopping screen should reinforce the strong technological side of the Evolution brand, create interest in the new shopping experience, attract new customers, deliver the collection concept efficiently and establish the brand.

Data reports could also be created through the screens to feed back information about customers, the brand, sales and consumers' opinions.

Although the idea is to bring the customer into the store, no doubt it could be transposed to the web, or to the smartphone as an application, where merchandise could be viewed and paid for via the phone. The customer could download the application by subscribing and therefore give their details so that garment recommendations could be pushed to them via the phone based on previous sales.

30.8.1.4 Communication

Katie took two approaches to the promotion of Evolution: the traditional and the technological marketing approach using new channels!

The Traditional Marketing Approach

Swing Tags:

Swing tags are attached to the garment; they show the brand message and hold information regarding garment size and price and any special laundering instructions. Every garment would be issued with a swing tag and the customer looks for this when browsing, other associated product's details could be included to increase sales.

The swing tags were developed from the 'beetle' shapes that inspired the print designs (this element would not change with the seasons, unlike the digital print subject matter); the tags were laser-cut out of Perspex to reinforce the technological element of the brand. A layer of the Ventile fabric was attached behind the Perspex with all of the ‘point of sale details’, such as barcode and size information.

Branding Tags:

Branding tags are more decorative additions to a garment to reinforce the brand; they can be attached permanently or can be hung with the swing tag – they could be made of more permanent material than the swing tag.

This tag was the same as the swing tag in that it was laser cut and a beetle shape, but this was a permanent branding fixture to the garment stitched near the hem (Figure 30.7).

Incentives:

Incentives are given to encourage custom and are usually in the form of a reward such as reductions in price, or giveaways.

To attract customers from the foot traffic outside the store, a series of giveaways would be offered each month, as incentives to investigate the brand, for example, in the summer months a reusable laser-cut lolly stick with the beetle brand would be made into ice lollies. Or a fully branded plastic water bottle would be given away in the summer.

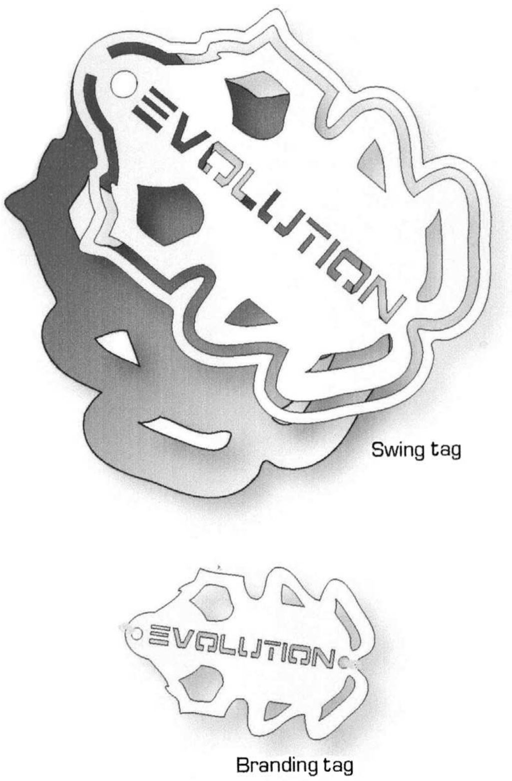

FIGURE 30.7

The laser-cut Perspex swing tag and brand tag for Evolution.

Press Release/Magazine Entries:

The collection needs to be visible in the correct magazine or newspaper with the right readership for the target customer.

New Technologies As Media Channels

The Video wall Experience:

Evolution would have 12 screens linked together to appear like one big screen. The screens would show a promotional video that is made up of shots from the photostyling shoot and print design ideas. It would have a similar kaleidoscopic effect as in the digital prints, ideally pulling the customer in.

The logo would flash up frequently to send a subliminal message to the customer as they are watching.

Interactive Walkway:

As an in-store promotion of Evolution, the interactive walkway would be eye catching, engaging and point any customers at the Evolution collection. When on standby, the walkway would appear like a sticker in the shape of the beetle logo, when stepped upon the beetle would break down into a 1000 digital beetles that will scurry along the walkway to the Evolution stand.

The diagram in Table 30.1 is of the 'critical path', the pulling together of all the necessary design (garments), research, promotion – including the web experience and business tasks – into a time frame.

30.8.2 CASE STUDY 2: 'STRATAGEM' BY LUKE ANTHONY RICHARDSON

The following Marketing Plan is of the menswear case study project, and there are a number of contrasts in this project to Evolution, namely the target market and price points, as this is a more exclusive range of garments (Richardson, 2010). The strong concept allows for another very creative promotional campaign.

30.8.2.1 Consumer

Stratagem is a menswear brand of 'technical' jackets (Figure 30.8). The collection includes a statement that challenges the existence of CCTV and surveillance in this society through concepts such as camouflage and invisibility.

Secondary research suggested that a camouflage print would help the wearer blend into an urban environment. The range is mainly constructed of outerwear garments that will behave as a shield to security cameras and the wearer's identity. The garments, quilted or filled jackets, windcheaters and full body suits, will change the wearer's silhouette. The all-over print is meant to deceive and confuse observers, large hoods and visors hide the face to maintain anonymity. The brand uses disruptive pattern material (DPM) (better known as camouflage print; variations are used by the armed forces worldwide, depending upon the terrain in which they are serving) as an urban option, rather than the typical woodland and desert colours (Figure 30.9).

Inspiration was also taken from traditional and modern workwear, with particular reference to details and function, fabrics and trim from the inside of high-visibility jackets.

Brand Identity

The logo incorporates the word 'rage' in Stratagem, which refers back to the anti-surveillance message. Yellow and black hazard tape is used widely across the promotion and branding and conveys the

Table 30.1 Critical path: case study – Evolution

2010	Research	Garments	Promotion	Business
January	Research into existing brands with similar design philosophies.			
February	Visit action sports retailer trade show, 3rd/4th USA Premiere vision 9th/12th Paris, London fashion week 19th/23rd, London.	Develop trend stories, colour, fabrics and silhouettes.	Begin promotional research.	
March		Begin designing/moulage and developing first prints and textile selections. Initial fabric sourcing, detailing and trim.		Identify key competitors and pricing of garments.
April		Develop collection. Finalise fabric choices and expand prints.		
May		Make up toiles for fittings.		
June		Adjust patterns/toiles for final fits. Work out size grading.	Begin promotional development.	Contact buyers at Top shop to make orders. Set budgets.
July	Visit bread & Butter trade show, 7th/9th Berlin.	Make changes where applicable to details taking from research. Approve final samples for production.		
August		Finalise fabrics and prints for production. Finalise production patterns and size grading. Create detailed technical packs for factories.		Agree on delivery schedule with suppliers.
September		Begin production.	Finalise promotional items and launch details.	
October		Continue production and monitor.		
November		Garment inspection in production and upon delivery.		
December		Final garment checks. Despatch orders to buyers.	Finalise launch and promotion.	Invoice with payment terms as agreed in the contract.
2011				
January	Begin Spring/Summer 2012 research.			Receive payment.
February		Launch collection.		
March				Monitor sales of Spring/Summer 2011 collection.

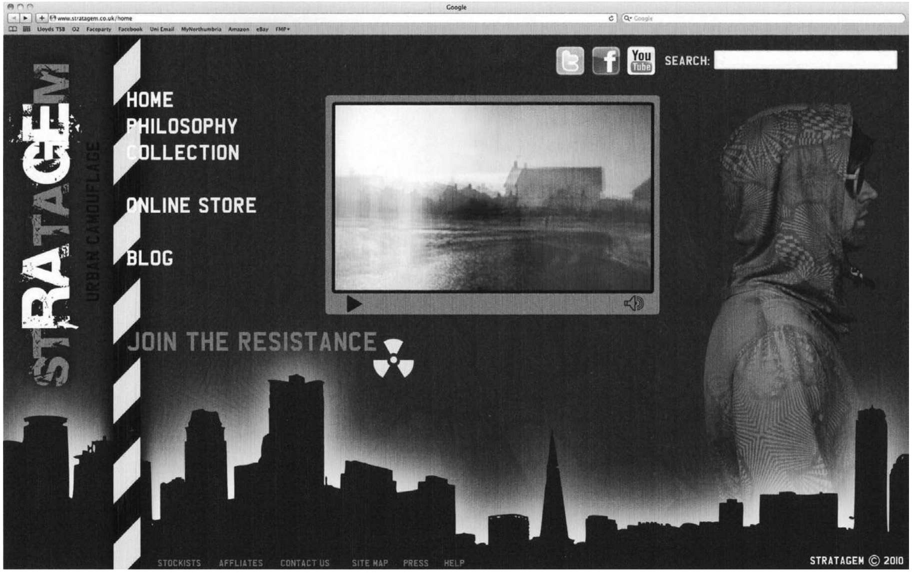

FIGURE 30.8

The branded Stratagem Website.

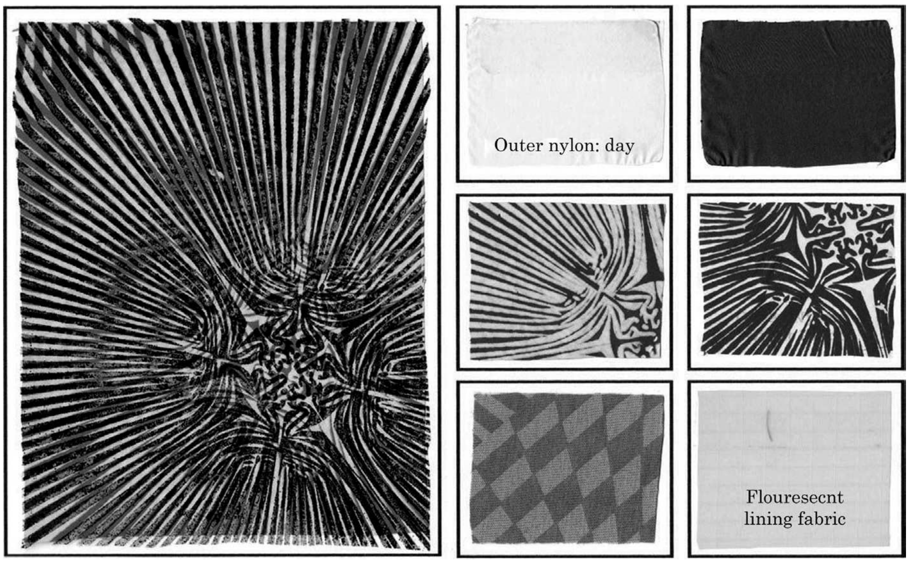

FIGURE 30.9

Moire style prints for the Stratagem collection.

FIGURE 30.10

Swing tags with the Stratagem branding.

message of hazard and exposure in a surveillance society. The garments have no branding on the outside in keeping with the invisibility concept, so swing tags indicate the price, size, colour, print option and garment style number. The collection does not relate to a season but behaves as a fashionable functional item. The range will develop but never to a season.

The range consists of 10 key garments, mostly outerwear, and most have the option of a day or night DPM print. Each item is named after CCTV cameras and systems.

The range consists of moiré prints, which are inspired by the effects that houndstooth style patterns have on television, where they become more obvious, and have an effect known as strobing, which should disrupt and confuse any camera surveillance (Figure 30.10).

Competitive Analysis

Luke looked at competitor brands and analysed their brand values. They were Belstaff, Berghaus, C.P. Company, Griffin, Maharishi, Moncler, The North Face, Stone Island and Superdry.

Customer Profile

Luke approached the customer profile with more specific headings, to get more specific answers and information. For example:

‘***The Creative***’:

Age: 25–35

Socio Economic Group: ABC1
Outlook: Appreciates design and conceptual ideas.
Interests: Technology, art & fashion.
Income: Disposable – will spend a lot of money on individual garments if it is something they like.
Lives: In Hoxton, London.
Occupation: A young professional who works in design or a product-based environment.
Travels: By underground or bus to get around town and takes an occasional taxi on nights out. Commutes to the city from work to home to meet friends. Is a regular in the rush hour.
Reads: Magazines – View magazines, Wallpaper, ID magazine.
Shops: In 'exclusive shops' in places such as Kingly Court just off Carnaby Street or Dover Street Market. Makes the occasional trip to Harvey Nicholls and Selfridges. Also buys online for specific pieces.
Brands: Maharishi & Comme des Garcons.
Socialises: Drinks in Soho.

Luke designed two further customer profiles called the ***Activist*** and the ***Functionalist***.

30.8.2.2 Cost

Luke did not include manufacture, labour and shipping costs as he could not estimate these accurately – there is risk in this, but the exercise is hypothetical and the garments are aimed at an expensive level of the market, so if Luke was to go to manufacture he would, of course, be able to complete the costings more accurately. Some trims, such as buckles, are given an average unit price. The price will be wholesale as this is how Stratagem will be sold to stockists. A mark-up will be added to the price to create a recommended retail price. Luke undertook more market research into Stratagem's competitors to create a realistic mark-up for the brand to sit comfortably within its target market.

A typical outerwear piece would require consideration of the outer fabric, lining fabric, silk wool rib trim, stuffing, pocket zips, front zip, invisible zip, Quickburst zipper, magnetic tape, magnetic fastener, visor mesh, reflective tape, webbing, eyelets, shock cord, vinyl, buckles and clips, toggles, grosgrain, branding label and cut vinyl.

Luke added a normal 100% mark-up to the wholesale price and 170% mark-up to the retail price without VAT. Luke's collection ranged from £125 for a jersey shirt to £800 for a jacket (Figure 30.11), all including VAT.

30.8.2.3 Convenience

The main outlet for Stratagem was going to be the Website www.stratagem.co.uk to maintain the philosophy of being inconspicuous. The reach of the brand would be greater on the Internet. Also, a bricks and mortar store was considered too high a risk in the economic climate. The Stratagem customer is a heavy Internet user, who regularly communicates online. The bonus of avoiding the reality of surveillance cameras helps to reinforce the brand.

The site gives the opportunity to customers to subscribe free, to 'Join the Resistance' where events, offers and news is shared.

Luke had a further idea of creating a 'pop up store' in the form of a heavy goods vehicle (HGV). The vehicle would stop off at nine major cities and sell Stratagem clothing: Edinburgh, Newcastle,

Tilt 600 TVL dome jacket				
Item	**Details**	**Quantity**	**Unit cost**	**Total cost**
Fabric	Outer fabric	7	£2.95	£20.65
	Lining fabric	3.5	£3.95	£13.83
Trim	Silk wool rib	0.4	£2.75	£1.10
	Stuffing	1	£6.00	£6.00
	Pocket zip	4	£4.50	£18.00
	Front zip	1	£12.50	£12.50
	Invisible zip	2	£2.50	£5.00
	Quick burst zipper	1	£20.00	£20.00
	Magnetic tape	0.1	£21.95	£2.20
	Magnetic fastener	2	£5.50	£11.00
	Visor mesh	0.25	£13.95	£3.49
	Reflective tape	0.1	£4.95	£0.50
	Webbing	5	£0.50	£2.50
	Eyelets	4	£0.05	£0.20
	Shock cord	0.25	£0.45	£0.11
	Vinyl	0.2	£12.00	£2.40
	Buckles & clips	18	£0.30	£5.40
	Toggles	2	£0.10	£0.20
	Grosgrain	0.05	£0.35	£0.02
Branding	Label	1	£0.50	£0.50
	Cut vinyl	0.05	£12.00	£0.60
	Total cost price			£126.18
	Markup to wholesale price @ 100%			£252.37
	Wholesale to RRP (ex. VAT) @ 170%			£681.39
	VAT @ 17.5%			£119.24
	Total (inc. VAT)			£800.63
	RRP			**£800.00**

FIGURE 30.11

A costing sheet for the Tilt 600 TVL Dome Jacket from the Stratagem collection.

Leeds, Manchester, Liverpool, Birmingham, Bristol, Brighton and London. This idea reinforces the brand, as it would not stay in any city longer than a week, creating interest and distributing promotional material. It also allows for distribution of the brand to its target customer. Some limited Stratagem pieces could be purchased in exclusive stores in the United Kingdom, as long as the brands around the pieces fit in with the Stratagem brand.

30.8.2.4 Communication

The Traditional Marketing Approach

The brand will be featured in Dazed & Confused or Another Man magazine, ideally driving readers to the Website. A promotional incentive can be offered by clicking on links on other sites to the Stratagem site.

New Technologies As Media Channels

Luke planned to use a 'Flash Mob' to launch Stratagem, organised through Facebook and Twitter, where participants can join a group that makes a statement about this surveillance society. This Flash Mob would involve 500 people selected from the group, all wearing Stratagem teeshirts (which they would be allowed to keep); the participants would have to stand still for 10 min in Canonbury Square, Islington, London, the home of George Orwell, author of 1984. CCTV footage of the event would be gathered and made into a film to be played in the Stratagem HGV and also sent out as a viral advertisement. The HGV would be heavily branded (Figure 30.12).

The vehicle would be equipped with CCTV, which would also capture footage from each city location visited, which would then be made into another part of the promotional film that could be viewed

FIGURE 30.12

A branded visualisation of the HGV.

FIGURE 30.13

The videos displayed on 24 screens like a CCTV control room.

online and on the wall of the vehicle. The film will demonstrate how the product works and it will be displayed on 24 screens, like a CCTV control room (Figure 30.13).

The ‘critical path’ for Stratagem is given in Table 30.2. Luke describes each action period as a phase.

Table 30.2 Critical path – Stratagem

Stratagem 2010 collection Critical path	Timing	Function
Trend research into garment styles, shapes and contemporary details.	December–January	Research – Phase 1
Research into competitors' collections.	January–February	Research – Phase 2
Research into promotional ideas.	January	Promotion – Phase 3
Development of initial concept ideas.	January–March	Product – Phase 4
Development of colour palette, silhouettes & fabrications	February–April	Product – Phase 5
Attend London fashion week 15th/23rd Feb. for trend research.	February	Research – Phase 6
Attend Premiere Vision trade show 5th/12th Feb. for sourcing.	February	Research – Phase 7
Begin initial design ideas for garments & prints.	January–June	Product – Phase 8
Start sourcing fabrics and trims.	February–May	Product – Phase 9
Brief fabric mills on prints.	May	Product – Phase 10
Finalise designs and collate range.	May–June	Product – Phase 11
Brief factories on garment designs for sampling.	June	Product – Phase 12
Begin promotional development.	June	Promotion – Phase 13
Set price margins and promotional budget.	June	Business – Phase 14
Receive print samples back and make amendments.	June	Product – Phase 15
Receive garment samples back and conduct fittings.	June–July	Product – Phase 16
Send amendments to factories for secondary sampling.	June–July	Product – Phase 17
Receive secondary samples and produce look-book.	July–August	Product – Phase 18
Agree on costs and delivery schedule with manufacturer.	July	Business – Phase 19
Send potential stockists look-book.	June–July	Product – Phase 20
Attend Bread & Butter trade show with collection 7th/9th July, Berlin.	July	Promotion – Phase 21
Finalise promotion & launch.	August	Business – phase 22
Close books and order fabric quantities.	August	Business – phase 23
Begin production.	July–September	Product – Phase 24
Visit factories to monitor production.	August–September	Product – Phase 25
Distribute garments to stockists.	August - September	Business – Phase 26
Begin next collections trend research (phase 1 and continue phases).	September	Research – Phase 27
Launch Stratagem.	September	Promotion – Phase 28
Flash Mob – stunt.	September	Promotion – Phase 29
Stratagem HGV spends 1 week each in @ Bristol, Brighton, London & Birmingham.	September	Promotion – Phase 30
Stratagem HGV spends 1 week each in @ Liverpool, Manchester, Leeds & Newcastle.	October	Promotion – Phase 31
Stratagem HGV spends 1 week @ Edinburgh.	November	Promotion – Phase 32
Promotional film is launched.	December	Promotion – Phase 33
Monitor sales of 2010 collection.	September–March	Business – Phase 34

30.8.3 CASE STUDY 3: COMMERCIAL CASE STUDY – ALL SAINTS OF SPITALFIELDS

This case study is about a successful commercial enterprise – All Saints of Spitalfields – designed to provide further contrast to the two student case studies Evolution and Stratagem though it does not explore as much detail, it is more about the brand and marketing of the brand.

The distinctive brand All Saints, now a large retail chain, was established in 1998 by Stuart Trevor, and it was taken over around 5 years ago by Kevin Stanford. There are now 90 sites across the United Kingdom, United States and Asia.

Brand Value

There are eight brand values that drive this brand: humility, individuality, honesty, dedication, hunger, decisiveness, distinctiveness and loyalty. Their mission is to ‘create a brand that blends culture, fashion and music into a potent formula of desirable clothing that expresses individuality and attitude’ (All Saints Brand History).

Customer Type

All Saints sell men’s, women’s and children’s wear, homeware, gifts and vintage garments.

The brand is set in industrial, warehouse style stores, with exposed brickwork, utility lighting and stainless steel fittings. The floors are wooden against distressed wallpaper and bare bulb lighting.

The playing of an eclectic mix of 1970s to contemporary music enhances the atmosphere. The brand is aimed at the ‘youthful in spirit’, which does not alienate an older customer.

Branding

The branding is that of a line drawing of a ram’s skull with ‘All Saints of Spitalfields’ written in simple, but slightly distressed lettering, reinforcing a feeling of ‘provenance’ and supporting the ‘vintage’ feel. This is set on a background of musty looking, aged, but quality, paper carriers with calligraphy print tissue paper wrapping and ram’s skull stickers. Online orders arrive in calligraphy print lined boxes with items again wrapped in printed tissue. The price points of garments can be fairly expensive, at around £30 upwards for a tee shirt to over £350 for substantial garments.

They use their store window to sell the strong image, and this remains consistent across the chain. They use ‘themes’ to tell a story backed up with props, lighting, music and colour in the environment. The aim is to create an entertaining experience for the shopper who can now choose to shop online, by catalogue, as well as instore.

All Saints do not use many traditional marketing methods, other than ‘word of mouth’. They took this element of promotion and used new technologies to make the most of what word of mouth they achieve.

The Website offers an ‘affiliate’ scheme to other companies, to spread the All Saints ‘word’. This works by the company adding a text link, banner ad, product feed or content link to the All Saints site. When a sale is made from using this access point to All Saints, the host company can earn a 7% commission (http://www.allsaints.com/ 16/10/10).

All Saints use Webtrends, Analytics 9, to analyse the customer journey from first clicking on the site to the sale. There was a desire to expand into the United States market, so it was important to understand consumer online habits. Analytics 9 works by analysing stock control and presents its data in a visual form, so that it is easy to understand and analyse. It tracks conversion and non-conversion to sales.

Wickedweb, the digital marketing agency, ‘a fast paced full service digital marketing agency, combining creative ideas, strategy and technology’ (http://www.wickedweb.co.uk/soc ial-media-marketing/ 15/10/10), provided the social media marketing strategy for All Saints; the brand has a Facebook, Twitter and iPhone application page accessible from the site (many brands use these tools now). It is possible to sign up to the mailing list and get regular emails about sales, new stock and any other events. The 'lookbook' gets emailed out to subscribers. Facebook fans can leave messages about garments and the brand and any other thoughts that provide valuable insight to the company but ultimately drives the consumer back to the ecommerce Website, All Saints' content is shared also, so there are reciprocal relationships when being a Facebook 'friend'. The iPhone application works on the phone, iPod touch and the iPad and updates automatically. The application can be used to locate local stores, browse the range and be aware of new styles, search for products, share 'wish lists' with friends and track any orders!

The Facebook fan base for All Saints grew from 4000 to 10,000 in 3 months, boosting its brand loyalty and sales conversion (Wickedweb)!

These marketing tools work as they provide a 'service' to the consumer so that they can remain loyal to the brand.

30.9 FUTURE TRENDS

Fashion moves very quickly and relies on inspirational intelligence material to inform products for forthcoming seasons. This works in two ways, firstly, a trend forecasting company analyses marketing information and forecasts long-term and short-term changes in consumer patterns. Secondly, a fashion forecasting company offers specifically fashion intelligence material to inspire a new season.

Trend forecasting consultancies use qualitative (this involves the analysis of data obtained from interviews, video or artefacts) and quantitative data (this involves the analysis of numerical data obtained from questionnaires, for example) and statistical data to inform the development of brand strategies for clients (McKelvey & Munslow, 2008). These companies offer insight into consumers and how they evolve in the future. They work across a range of industries such as retail, creative, technology and finance. They report on trends across the globe and analyse social, political, economic, artistic and cultural influences. Anticipating the needs of customers is invaluable to any industry. Developing new brand strategies for companies is undertaken by the trend company. Key companies working in this area include Future Foundation (http://www.futurefoundation.net/), a commercial think tank that looks to the future by forecasting social and consumer trends, based in London. The Future Laboratory (http://www.thefuturelaboratory.com) is a team of trend analysts and ethnographic researchers, based in London, offering clients insights into targeting and understanding future consumers. Faith Popcorn (http://www.faithpopcorn.com/) is a developer of long-term 'lifestyle' trends, aiding clients in developing new relevant products for the future: the service is known as BrainReserve. Trendwatching (http://trendwatching.com/) distributes free monthly briefings by email after subscribing to the service on the Website, giving an insight into new consumer trends. Companies can purchase more in-depth information. Henley centre is a consultancy led by research and intelligence that aims to offer insight and innovation into the future for a range of clients.

30.9.1 FASHION FORECASTING

Fashion forecasting is an essential service to the fashion design industry. Its purpose is to 'forecast' what will happen 18 months to 2 years ahead of any season. This requires a degree of intelligence gathering by these companies, and this consists of looking at the latest stores, designers, brands, trends and business innovations (McKelvey & Munslow, 2008) in leading fashion capitals, such as London, Paris, New York, Milan and Tokyo. These services create a synthesis between what is happening and what they think is going to happen; much of this feels like intuition, but an experienced forecaster will understand what will happen next due to the cyclical nature of fashion, influences such as social changes, political changes, economic effects, cultural and artistic influences: all have a bearing on what will happen. Forecasting services employ designers and illustrators to realise the ‘vision’ for a given season.

Such companies have been around for some time, as an identifiable industry in their own right from the 1960s, and sold the information in limited edition hand-swatched books, but they also tailored the intelligence to specific markets dependant upon the client’s product area.

Nowadays, much of the information is accessed on the Internet; some companies like Worth Global Style Network (WGSN) offer online information as a ‘closed site’, which requires a subscription to access the information. The subscription can be a considerable amount of money, for example a full service of 12 publications a year could cost around £5000 a year. Once logged into a site, the resources available can be enormous: WGSN offer information on industry news, business resources, trade shows and fairs, fabrics and trims, catwalk reports, editorial, conceptual inspiration, trend information, retail information – visual and textual, new information in key capitals, beauty information, men’s, women’s, junior and youth wear, active sportswear, graphic ideas and information about new graduates from fashion courses (this ‘showcasing’ of a graduate’s new ideas and approach to designing for fashion can be inspirational and can also prove to be a good recruitment tool).

This information is analysed and published so that the industry can utilise it at their particular market level. There are a number of companies producing trend information; it remains a fairly small but very significant contributor to the fashion industry.

Also, some larger fashion retailers may well have in-house forecasting where they look specifically at their product and gather their own intelligence by sending buyers and designers on trips across the world.

Some of the companies offering traditional fashion forecasting services (books and consultancy) are Carlin International, Fashion Forecast Services, Here & There, Jenkins Reports Ltd, Milou Ket Styling & Design, Mudpie Ltd, Nelly Rodi, Peclers Paris, Promostyl, Sacha Pasha, Trend Bible (interiors) and Trend Union. These companies often have an online presence, but much of their work is to do with publications and consultancy.

Online forecasting agencies are Fashion Snoops, Infomat, Stylelens, Stylesight, Trendstop Ltd and Trendzine.

Professionals in the forecasting industry have created a group, online, in the professional social network, Linked In. Called Hall5, this is to share information, issues and concepts in this professional forum between each other.

Cool Hunting is a Website that offers inspiration as a designer’s personal reference through analysis of innovation in design, technology, art and culture. Updates are available daily and weekly documentaries are available. It is possible to subscribe to the newsletter by RSS feed (Really Simple Syndication – used to publish frequently updated work such as news headlines and blog entries) and by email to Cool Hunting. It is available on iPad and they can be followed on YouTube, Twitter and Facebook (http://www.coolhunting.com/ 04/08/11).

30.9.2 NEW TECHNOLOGIES AND PROCESSES

There are many opportunities to find out what may be the next important future trends by searching on the Internet. General lifestyle trends, marketing trends and the changing consumer, shifting market trends and the impact of new technology trends and contradicting trends can all be found very easily.

Faith Popcorn's site – Brainreserve – offers 17 long-term, evolving trends that tell us about ourselves and how we are changing, what our needs and desires are, for example, 'the way women think and behave is impacting business, causing a marketing shift away from a hierarchical model toward a relational one'; This trend is about marketing to the different needs of women. Popcorn considers it a 'model' rather than a trend. Faith Popcorn (Evolution trend, http://www.faithpopcorn.com/ 04/08/11).

Trendwatching is a leading 'consumer trends firm' that gathers intelligence from across the world, which it pulls together to form a picture of what is going to happen. One of their current 'briefings' suggests that the expansion into global markets will mean that brands will have greater success, but they suggest also that new brands will be developed and the consumer will covet many more into the future; for example, there will be new opportunities emerging from markets in China, India, South Africa and Brazil (http://www.trendwatching.com/briefing/).

The demand for innovation and new technology such as the iPod, iPad and iPhone and gaming consoles such as the Nintendo DS in products and services across all sectors will not stop. The next generation will be 'digital natives' (Marc Prensky (2011) created the term in his publication 'Digital Natives, Digital Immigrants' and refers to people who grew up with twenty-first century new technology, or were born during or after the introduction of digital technology so that it becomes 'second nature' to them. A digital immigrant is an individual born before digital technology existed but has adopted it in their life) and will drive technological developments; however, they will become concerned about green and environmental computing, with the increased use of mobile phones and wireless access (http://ww2.prospects.ac.uk/cms/ShowPage/Home_page/Explore_job_sectors/Information_technology/future_trends/p!eklfif, 04/08/11).

Three forecasts were offered by one Ron Reed (an American entrepreneur, publisher and professional consultant in the real estate and Internet marketing industries; within these two communities he is often referred to as a 'guru'), regarding future trends in technology. His first was about working in 'real time'. In other words, instead of designing, producing and marketing a product, why not put it into the social networking arena and get feedback before you go to all of this trouble. He uses the example of a musician putting out a song for feedback, then reacting to the feedback by developing an album around this.

The second forecast involved the use of augmented reality (AR – combines live video on your mobile phone with computer-generated data and visualisations, perhaps about the buildings in front of you; Figure 30.14).

This works by using GPS on a smartphone, so that at any given moment the satellite system can pinpoint your location and use data from sites like Google and MapQuest to offer information on a restaurant, for example, and maybe get reviews and even menus on your phone. Think how powerful this could be if it was a fashion store with marketing information.

A third suggested forecast and current development (Reed suggests it is already in use in Asia, it is in some use in the United Kingdom by Barclaycard, Orange and by Oyster Card and by the smart card payment symbol on mobile phones) could be the use of the iPhone, or other smartphones, which have a massive market share; as a means to pay for items in a store, instead of using credit/debit cards, or cash, you could scan the phone and add it to your phone bill (http://www.whoisronreed.com/ron-reed/future-trends-in-technology-for-2010, 04/08/11).

FIGURE 30.14

Augmented reality.

Source: Image courtesy of Jack Webber.

30.10 SUMMARY POINTS

- Marketing aims to target customers with relevant products, they use the marketing mix of product, price, place and promotion or more broadly the updated version for ‘niche’ markets of consumer, cost, convenience and communication.
- Targeting a market can be done in a number of ways, for example, by geographic segmentation, psychographic segmentation, demographic segmentation, behavioural segmentation, socio-economic classification, customer profiles or seasonal and occasion markets.
- Branding is key to achieving a clear identity to be able promote products.
- There are traditional channels to promote products, such as television advertising, ambient media, magazine advertising, celebrity endorsement, radio advertising, sales promotion, public relations, personal selling and direct marketing.
- New technologies are providing new promotional media channels. The development of Web 2.0 has allowed more interaction and social networking on the Internet; Facebook, Twitter, Instant Messaging, virals, blogs, YouTube, podcasts, Webcasts and email are proving to be valuable channels of promotion. ‘Digital’ marketing agencies create customised strategies using these channels.

- The marketing plan helps to strategically think through the marketing mix.
- Future fashion trends help to inform the marketing plan.
- Future trends regarding the consumer, lifestyles and new technologies help to inform future strategies for marketing fashion products.

30.11 PROJECT IDEAS AND REVISION QUESTIONS

1. What are the fundamental differences between looking at product, price, promotion and place compared to consumer, cost, convenience and communication?
2. List the different methods of targeting customers in the text; can you find two more methods and discuss the advantages and disadvantages of each?
3. Create a brand and brand values for a casual fashion womenswear label aimed at digital immigrants in the middle-market price range.
4. Plan the concept development based on the research from Question 3. Create the critical path.
5. Take your concept: what tools would you use to promote it creatively using traditional methods?
6. Then suggest how you would push the concept further by using new technology channels and give reasons for these suggestions.
7. Discuss how fashion forecasting would inform your concept.
8. Can you think of new ways to use new developments in technologies to promote your brand? Show your understanding by discussing the use of technology in promoting your concept.

30.12 SOURCES OF FURTHER INFORMATION

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30.12.2 TREND FORECASTING COMPANIES

Faith Popcorn – Brainreserve http://www.faithpopcorn.com.

Future Foundation http://www.futurefoundation.net/.

Future Laboratory http://www.thefuturelaboratory.com.

Henley Centre/Headlight Vision http://www.hchlv.com/.
Trendwatching http://www.trendwatching.com.

30.12.3 FASHION FORECASTING COMPANIES

Carlin International http://www.carlin-groupe.com.
Fashion Forecast Services http://www.fashionforecastsevices.com.au.
Fashion Snoops http://www.fashionsnoops.com.
Here & There http://www.doneger.com.
Infomat Inc. http://www.infomat.com.
Jenkins Reports Ltd http://www.jenkinsreports.com.
Milou Ket Styling & Design http://www.milouket.com.
Mudpie Ltd http://www.mudpie.co.uk.
Nelly Rodi http://www.nellyrodi.com.
Peclers Paris http://www.peclersparis.com.
Promostyl http://www.promostyl.com.
Stylelens http://www.stylelens.com.
Stylesight http://www.stylesight.com.
Trend Bible (interiors) http://www.trendbible.co.uk.
Trend Union http://www.trendunion.com.
Trendstop Ltd http://www.trendstop.com.
Trendzine http://www.fashioninformation.com.

30.12.4 MAGAZINES

View Publications – Viewpoint is a magazine about consumers and new markets. http://www.view-publications.com.
WeAr Global Magazine – a magazine that captures the zeitgeist and offers trend reports from major cities, photographs of designer collections, stores, showrooms, interiors and window displays. http://www.wear-magazine.com.

30.12.5 WEBSITES

Branding http://www.brandchannel.com/papers_review.asp?sp_id=1234.
Celebrity Endorsement http://www.oxbridgewriters.com/essays/marketing/consumer-celebrity-endorsement.php.
Guerrilla Marketing ideas http://blogof.francescomugnai.com/2009/11/the-80-best-guerrilla-marketing-ideas-ive-ever-seen/.
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Richardson, L. A. (2010). Stratagem: Urban camouflage – marketing plan, Unpublished – relevant material is contained within this chapter in the second case study – Stratagem. Degree of BA (Hons) Fashion Marketing @ Northumbria University, School of Design.

Web 2.0 http://oreilly.com/web2/archive/what-is-web-20.html 02/08/11.