- APPROVED PUBLICATION VERSION -

DEFINING THE OMNICHANNEL RETAILING STRATEGY OF THE CONTEMPORARY MALE FASHION STORE

AN MIXED METHOD CASE STUDY OF SUITSUPPLY

Master Thesis – Final version
Erasmus University Rotterdam
Erasmus School of History, Culture and Communication
MA Cultural Economics and Entrepreneurship
Thesis supervisor: Dr. Mariangela Lavanga
Co-reader: Prof. dr. Arjo Klamer

Date of deadline concept version: May 12th, 2014
Date of deadline final version: June 9th, 2014

Willeke van Die – 371451
371451wd@eur.nl

ACKNOWLEDGEMENTS

Before you lies the final version of my ‘master piece’, in which I studied the role of the contemporary omnichannel male fashion store by means of an exemplary case study of Suitsupply. After months of preparation, exploration, investigation, inspiration and – excusez-le-mot– transpiration, I would really like to thank the most important people that supported and continuously encouraged me in the making of this thesis.

First of all, I would like to say special thanks to my supervisor dr. Mariangela Lavanga, who has shown great confidence in the succeeding of this thesis and, despite her fear to have ‘tricked me’ into the field of fashion, significantly triggered my enthusiasm for the functioning of this fascinating, and normally rather hidden, industry. I must say that her support has given me that particular boost for continuing my journey when I needed it the most. Additionally, I am grateful for the opportunities she presented for experiencing fashion in practice, such as by being my companion at the Fashion Colloquia at AMFI and through our once-in-a-lifetime visit to the Riga Fashion Week 2014.

Furthermore I would like to thank my boyfriend Tim Evers, who has been my loyal help, support and sparring partner during the past few months of this master, even on moments when the end of it felt rather far off. The same goes for my family, who all expressed heart-warming belief in a successful completion of my thesis.

To conclude, both ArtEZ and Suitsupply have put great effort in finding the right informants for this research. In particular Niels van de Vorst – visual merchandiser and photographer at Suitsupply - has provided me with his professional advice and a long list of enthusiastic participants in both the stores and headquarters. I would like to thank each of them for their share of information. Also, I am thankful for the valuable involvement of my classmates, with whom I shared this extraordinary process and who have become dear friends while doing so. In my opinion, it is the collaboration of everyone mentioned in these acknowledgements, that has made the creation of this master thesis into a learning experience and success. It is much appreciated.

Willeke van Die

Due to confidential information provided by Suitsupply during the interviews, this publication version of the research only entails publicly accessible information and images. For in-depth input and outcomes of this research, please contact the research via: +31 6 34 87 26 52 or w.f.vandie@gmail.com

ABSTRACT

For many years, the only way to purchase a fashion item was to buy it in physical stores. Yet, after a period of mail order catalogues and later on, successful web stores, the role of this traditional, offline retail environment was questionable. Hence, why would men put effort in purchasing a product, when it can also be brought to them? In other words, isn't the transformation from the 'physical' to the 'digital' simply a case of 'creative destruction' as defined by Schumpeter (2003), in which old traditions are replaced by new, more efficient innovations?

This thesis engages in this debate by proposing a novel, omnichannel perspective. This perspective emphasizes the co-existence of multi retailing channels in a holistic strategy, in which individual strengths accumulate to an interdependent business model that meets the preferences of every single customer. In addition, omnichannel fashion retailing ends the discussion regarding which channel 'wins'; altogether, they significantly outperform the individual.

Based on a mixed methodological case study of Suitsupply's supply and demand side, a first definition of the contemporary omnichannel male fashion store is provided, bridging the previous gap between knowledge from the past and prospects of the future. The 'present' shows that – despite the current limited role of mobile devices – omnichannel retailing is recognized and to some extent incorporated in the visions of both Suitsupply employees and customers. The results of this thesis strongly indicate, that the offline male fashion store retains its number one preferred position with respect to *purchase-oriented* visits, while the web store predominantly functions as a complementary *orientation-channel'.* These insights form a modest starting point for future research, for which fellow-students and scholars are cordially invited to proceed.

KEYWORDS

| Male fashion | Omnichannel retailing | Creative economy | Creative destruction |
Experience design | Craftsmanship | Curatorship |

TABLE OF CONTENTS

1. INTRODUCTION

1.1 THE DEBATE

"*Fashion (…) is more than a fashion, it's a metaphor for the advent of modern bureaucratic societies. More than a page in the history of luxury, class distinction, and rivalries, it's one facet of the ongoing 'democratic revolution*" (Lipovetsky, 1994). It is known for its leading, cutting-edge and canonical practices (Hemphill & Suk, 2009). The so-called "*ebb and flow of trends"* (p. 1151) – a recurrent process in which the new gets old and the old gets new again - characterizes the industry and sets it apart from any other (creative) industry. According to the scholars this unique position co-exists with a tension between expressing individuality and paradoxically exemplifying conformity through common trends (Hemphill & Suk, 2009). As will be emphasized in this thesis, the role of retailing i.e. stores can be seen as a value-adding intermediary between supply and demand, establishing a 'connection' between the brand and the consumer.

With the beginning of the 21st century, this exemplary industry faces a number of significant trends and changes. Changes, that have a lot to do with the economy that came along with the millennium: the so-called 'Creative Economy' (Nakamura, 2000). In this economy, products of exchange are no longer focused on tangible products, but rather on the offering of intangible values such as 'memorable experiences' (Pine & Gilmore, 1998). Also, Schumpeter (2003) states that the new economy has resulted in a form of 'creative destruction', in which old habits and traditions are being replaced with new innovative skills and methods. Yet, being an industry that both has an important, material core – i.e. the garments – and is known for its representative character with respect to other industries, the fashion industry currently undergoes an interesting development. This development entails the above-mentioned recurrent ebb and flow of trends, while constantly seeking new creative, digital ways of creating, producing and marketing top-notch apparel. As a result, many – seemingly - conflicting yet interesting processes can be observed in the form of omnichannel fashion retailing in both theory and through empirics, all of which the former will be critically analysed in the next chapter, followed by the latter in the form of an exemplary case study.

While the notion of 'creative destruction' seems to have lightened up the discussion regarding the current, lost added value and the potential disappearance of physical stores as a result of the rise of the Internet (Gerbert et al., 1999; in Petermans, 2012), a number of scholars, professionals and consultancy firms are convinced of the opposite. In their opinion, 'brick-and-mortar' shops possess a number of features that simply cannot be replaced by a digital or mobile variant (Petermans, 2012; Diep & Sweeney, 2008; Carù & Cova, 2003; Pine & Gilmore, 1999; StudiobyJudithterHaar, 2014; Suitsupply, 2014). In fact, physical stores seem to rather *strengthen* the performance of web stores and mobile applications, offering 'multi-sensory experiences', 'quality' in the form of craftsmanship and personal advice, and customer 'co-design' while 'reducing the risk' that accompanies fashion items as experience goods (Pine & Gilmore, 1999; Carù & Cova, 2003; Fiore et al., 2004; de Raeve et al., 2012). This strengthening role nuances the concept of creative destruction, proving that recurrent processes, in which *old* traditions retain their status, well support *new* practices (Scarpi et al., 2014; Hemphill & Suk, 2009).

As a reaction to the previously undervalued offline store, a number of consultancy firms presented matching forecasts from the perspective of 'Retail 2020'. In these prospects, physical, online and mobile retailing channels are no longer approached as being competitors; they function best when operating in one co-existing, omnichannel business model (PwC & Kantar Retail, 2013; Accenture, 2013; KPMG, 2013; Wolters, 2013). These omnichannel retailing strategies seem to form the basis of fully individualized and holistic client-communication, enabling customers to approach the store at any preferred point in time, via every possible channel.

Yet omnichannel fashion stores haven't been studied empirically yet. On the contrary, currently existing literature shows a gap between extensive historical studies and future expectations. What is missing is the 'now'. Consequently, the question remains: what is really happing in the *contemporary* fashion retailing industry? Have modern-day fashion retailers indeed found a comprehensive solution for the debated role of physical stores or is there undeniably a form of creative destruction to be witnessed, replacing offline shops with virtual retailing environments?

Given the above-claimed 'strengthening role' of physical stores in terms of - amongst others - 'craftsmanship'; investigating the *male* fashion industry appears to be an interesting research starting point. Hence, as will be described in the theoretical framework of this thesis, the male fashion retailing industry has always been - and still is - known for its tailoring. Being that tailoring requires a high level of - physical - customer-involvement (de Raeve et al, 2012; in the expert phase: van de Vorst, 2014), the added value of physical stores in that segment seems apparent. However, can this be confirmed empirically? And if so, how does the notion of *omnichannel* retailing come into place?

1.2 GOAL AND RESEARCH QUESTIONS

This master thesis aimed for presenting a holistic image of the modern-day male fashion store. Up until today, individual retailing channels have only been studied separately from each other. By means of examining the *omnichannel* strategies of exemplary male fashion retailer Suitsupply, these channels are combined into one case study. Moreover, the mixed-methodological character of this research studied the attitude and vision of both the supply – through Suitsupply key-informants – and the demand side – by means of Suitsupply customers. By doing so, the following research question will be answered:

How can the omnichannel retailing strategy of the contemporary fashion store for men be defined?

This overarching research question is divided into the following sub-questions:
Q1: How has the role of offline fashion stores for men changed over time, according to the literature?
Q2: What is the role of online and mobile fashion retailing in this development, according to the literature?
Q3 - Supply side: What is the current strategy of the omnichannel male fashion store, according to Suitsupply?
Q4 - Demand side: What is the current role of the omnichannel fashion store, according to Suitsupply customers?
Q5: To what extent is the vision of supply and demand side aligned?

Despite a smaller quantitative sample than envisioned, the concluding chapters of this thesis will define how individual retailing channels co-exist in a modern-day omnichannel male fashion retailing strategy and how this interdependence is currently perceived by customers.

1.3 RELEVANCE OF THE RESEARCH

After extensive investigation within the field male fashion retailing – displayed in the theoretical framework of this thesis - it becomes clear that this industry should be regarded as a related yet independent market with respect to female fashion. Consequently, this understanding urges the need for men-oriented fashion retailing studies. Studies that turn out to be scarce, if not, absent.

Also, scarcity of omnichannel retailing-related studies has been detected by the above-mentioned consultancy firms, which in their turn provided interesting prospects based on historical trends. Furthermore, a number of closely related articles have been published, individually analysing retailing channels as independent rather than incorporating into an omnichannel framework. Yet, for an industry that is known for being exemplary for what is happing in society (Lipovetsky, 1994), small pieces of the holistic puzzle are simply insufficient. This industry therefore deserves comprehensive research with respect to current activities on both supply and demand side. By doing so, the recent trend of 'guessing' will finally be converted into 'knowing'.

Next to the scientific relevance of this research, society might benefit from the outcomes as well. Hence, motivation for studying the phenomena in this particular industry arose from the concerning exodus of physical stores from the streetscape, as a result of rising online purchases. By presenting an exemplary case of a successful omnichannel fashion retailer, other retailers might be encouraged to re-incorporate an offline store in their current business model. Ideally, this movement might regenerate current unoccupied city centres, while consciously aligning supply with preferences and desires of the demand side.

1.4 RESEARCH STRUCTURE

This thesis can be divided into three parts.
Part one commences with the theoretical framework in chapter 2, offering a foundation for the empirical case study. In this theoretical framework, the historical development of economies in general, as well as the fashion retailing industry in particular, will be examined. The latter indicates male fashion-related events, compared with activities in this industry for women. Secondly, the status quo of the male fashion retailing industry will be discussed, demonstrating modern-day trends in the field of fashion and retailing. Chapter 2 concludes with presenting future expectations and starting the debate with regard to gaps and contradictions in the examined literature.

Part two starts with chapter 3, introducing the case of Suitsupply, accompanied with photographs, taken during the in-store interviews.

In chapter 4, the methodology of this mixed-methodological case study will be described, in which the main research question, as well as sub-question will be proposed. Based on these sub-questions, the research is divided into three parts, examining the vision of fashion professionals in the expert phase, followed by a qualitative study of Suitsupply employees and a quantitative investigation of the organization's customers. These three parts eventually enable data triangulation, testing the alignment between the participants' visions and attitudes.

Lastly, the main findings and results, derived from the performed research are presented in chapter 5. In addition, chapter 6 translates these outcomes into conclusions, answering the research question and sub-questions and discussing debatable elements. Part three of the thesis ends with specific recommendations for future research.

The questionnaires of both the qualitative and quantitative studies, as well as an elaboration of the expert phase and a complete overview of photographs taken in Suitsupply stores, can be found in the thesis' appendices. The transcripts of the interviews are attached by means of a complementary CD.

2. THEORETICAL FRAMEWORK

Introduction

In order to fully understand the cultural economic developments in contemporary fashion retailing, this theoretical framework firstly offers a concise overview of the evolution of economies in general. From this point onwards, an impression of the development of the male fashion industry will be provided, where after both the evolution of economies and fashion retailing history are combined into a male fashion retailing timeline. This fashion retailing timeline concludes with an analysis of its current observed status quo – from which the research in this master thesis takes off.

2.1 DEFINITIONS OF THE KEY-CONCEPTS

Fashion

This thesis approaches '*fashion*' as a sub-sector of the '*creative industries'* described in 1998 by the DCMS (BOP, 2010) and UNCTAD (2008). DCMS (BOP, 2010) defines these creative industries as "*those activities which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property*" (p. 16). According to UNESCO (2000), the creative industries are – depending on the context – also referred to as the cultural industries. UNESCO (2000) defined the latter as *"those industries that combine the creation, production and commercialization of contents which are intangible and cultural in nature*" (p. 11-12)

'Fashion design', as a design-related element of the creative industries, is mapped as "*a relatively small sub-sector, but (…) highly integrated into the international market*" (BOP, 2000, p. 16). UNCTAD (2008) states that the 'creative industries' lie at the heart of the creative economy and defines 'fashion' as a sub-group of "*functional creations",* which is demand-driven and service-oriented (p.14). Since 'functional creations' is part of the creative industries as a whole (UNCTAD, 2008), fashion can be regarded as an industry at the core of the creative economy.

The characteristics of a fashion good

The above-described definitions give an abstract image of the creative industries as a whole and fashion as one of its sub-groups, however they don't describe *what* it is the fashion industry actually *creates, produces and commercializes*. According to UNESCO (2000) the fashion industry as an element of the cultural or creative industries supplies *intangible, cultural* goods. Yet when analysing a fashion good, i.e. a garment, it seems evident that this product also entails *tangible* assets. Hence, (potential) customers are well able to *see* a fashion item, to try it on or *wear* it and *hear* the sound of the fabric when doing so, et cetera. In order to overcome misunderstandings with regard to what fashion is and what it is this industry produces; this paragraph shortly defines the characteristics of a fashion good.

"*Fashion is a cultural item whose adoption shows the preferences of a group of people (…) which have certain symbolic values*" (Aage and Belussi, 2008, p. 476). These symbolic values are expressed via specific colors, cuts and quality, in which fashion as a whole can be seen as a tool for people to build their "multifaceted identities" (p. 476). Due to its resemblance to this heterogeneous group of people, fashion goods know a high level of *product-differentiation* (Lipovetsky, 1994). This differentiation is visible in two manners, namely across labels *within the same trend* – creating uniqueness of the product while imitating successful designs of others (Hemphill and Suk, 2009) - and *within labels* – diversifying products by e.g. introducing second or even third lines next to regular collections (Lavanga, 2012). Despite the rather unstandardized character of designs, the fashion industry operates in a *monopolistic competition,* seeking niche markets to escape the constant threats of *close substitutes* that can easily replace 'lagging' firms. The latter characterizes the fast pace in which contemporary fashion goods are produced and sold (d'Aveni, 2010; Allwood et al., 2006; Hemphill and Suk, 2009). One way to 'escape' this constant speed and competition is by designing garments that are at the high-end of the continuum between *necessity* and *luxury* (Maslow, 1970; Lipovetsky, 1994), representing fashion as a unique piece of art. Yet, the higher the level of differentiation, the more a fashion item expresses the characteristics of an *experience good*, i.e*.* a good of which the quality can only be assessed after purchase (Handke et al, 2014).

'Luxury goods' – among which fashion garments can be considered according to Robinson (1961) - are found to be *price-elastic*, meaning that the quantity demanded highly reacts to the set price of the good. On the other side of the continuum there are 'necessities'. Maslow (1970) defines necessities as basic psychological needs – among which he names 'functional clothing', which should be fulfilled before desiring more social yet less necessary needs. This need for fulfilment *suggests* a rather price-inelastic demand for functional clothing.

However since this 'necessity' – as a counterpart of the 'luxury good' - is still often perceived as rather universal, i.e. undifferentiated, it should be taking into account that in the case of the *fashion* - rather than *clothing* - retailing industry, it is debatable if the purchased items are actually designed for functional consumption. Instead, there is a phenomenon to be witnessed, which represents the complete opposite of consumption-related, neoclassical demand and price-elasticity theory. Hence, what characterizes the fashion industry is that demand can't be defined and predicted by rational principles. Instead, it repeatedly presents the contrary, *increasing* simultaneously with an increase in price (Rueling, 2000; Leibenstein, 1950). According to Handke (2010), this phenomenon is called the '*Veblen effect'*, which occurs when goods are purchased in order to demonstrate social status and taste. Rueling (2000) states that in the fashion industry, it is the high-end Veblen goods that are imitated by dress of the 'lower classes'.

Lastly, *'uncertainty'* is seen as part of fashion's nature (Aage & Belussi, 2008). First of all - since this industry depends on supply-induced production - consumers are constantly depending on the designs and trends that *labels* are offering. At the same time, Aage and Belussi (2008) state, fashion is out of the designers' control as well. Hence, supply "*must be able to adapt their production to nearly unforeseeable fashion trends, but, at the same time, they must be recognized by consumers for their ability to introduce novel original contributions*" (p. 476). This phenomenon is highly related to the 'nobody knows' principle of Caves (2000), referring to the general uncertainty that accompanies the producer of any creative good.

Fashion intermediaries

Meeting the above-mentioned characteristics isn't the only condition for qualifying a garment for being 'fashion'. According to Polese (2013), *"the crucial condition for clothing to become fashion is that there is a (tight/smooth) interaction between producers and consumers*" (p. 2). In other words, before supply actually meets demand, many things can happen to the message that is sent from one side to another. The fashion industry consists of a number of intermediaries that all have the capacity to neutrally steer or adjust this message, illustrated in the following communication model:

Designer → Message → Consumer

Figure 1: Own elaboration of the designer-consumer communication model, based on Petermans (2012, p. 52)

According to Lavanga (2012) an extensive list of intermediaries can be identified, ranging from: "old" intermediaries such as "*stylists, models, photographers, magazine editors and journalists, sales agents, buyers, fashion forecasters, PR agents, fashion weeks and fairs, fashion-related educational institutions"* to "*new*" ones such as: "*marketing and consumption websites, social networking websites, fashion bloggers*" (p.4). Both groups have a significant role in influencing the consumers' attitude with regard to the *"fashion industry and the value they attach on it*" (p. 4).

Csikszentmihalyi (1996) adds that the input of intermediaries is required in order to determine which products are creative and which aren't. This 'guiding' principle enables consumers to make better-informed purchase decisions, a service that might reduce the involved risk of acquiring an experience good such as a fashion product.

This thesis focuses on the fashion retailer. From the perspective of fashion intermediaries, retailers – i.e. stores - can and will be addressed separately from the designer and producer of fashion items. Hence, – as will be described later on in the literature review - despite the fact that the store simply isn't the designer of a fashion good, it does influence the message that is sent from the supply side via various features. It should therefore be taken into account that this thesis purely focuses on the role and strategy of this *communicational environment*, instead of also incorporating the role of designer and fashion products an sich.

Based on this decision, the following communication model, defined by Petermans (2012), will be kept in mind:

	Retail store	
Designer →	Message →	Consumer

Figure 2: *Own elaboration on the communication model applied to fashion retailing, based on Petermans (2012, p. 52)*

As Petermans (2012) points out in her model, stores function as a means of communication between the consumer and the retailer or designer. Inevitably, *what* this above-illustrated message is and *how* it is communicated towards customers, varies per retail environment. Also, the level of (in-) tangible values – as an element of Pine and Gilmore's (1998) 'experience economy' - incorporated in this message may differ due to rather distinguishing characteristics per store. The latter will be motivated by the later on.

Fashion retailing

While the classification as 'experience good' indicates the *risk, high transaction costs* and *difficulty to choose* consumers face when acquiring a new garment; for suppliers it is a matter of lowering these apprehensions via the wide variety of modern-day retailing channels – namely *offline, e-* and *m(obile)-commerce* (Magrath & McCormick, 2013).

Moore and Doherty (2007; in Moore et al., 2008) define fashion retailers as "*those firms that distribute clothing, accessories and other lifestyle products (…)*" (p. 143). Petermans (2012) adds that retailing environments such as the (combination of the) offline and online store function as a *means of communication* between the fashion label and the consumer. Additionally Kozinetz et al. (2002) identify the following three distinguishing fashion retail characteristics:

they carry a single – established - brand or product; the store is owned by the product's manufacturer; and they operate "*with the intention of building brand image rather than solely to generate profit for the company*" (p. 17). By going online, fashion labels expanded their markets through "*online designer stores, retailer websites, and e-magazines*" (Blanco, 2011, p. 110).

The fashion supply chain

Before – later on - identifying and describing the historical and leading trends in the fashion retailing industry, a concise image of the 'fashion supply chain' will be provided, in order to in- and exclude the for this thesis (ir-)relevant male fashion retailing progresses.

Petermans (2012) describes three types of fashion retail environments: *brick-and-mortar* (physical) environments; *brick-and-click* (a combination of offline and online) environments and lastly, the *online environment* (p. 54). Especially the latter has become increasingly popular. In the beginning of the 21st century, some scholars in fact approached the offline retail environment to be 'dead-weight' (Gerbert et al., 1999; in Petermans, 2012). However, before jumping to conclusions with regard to the truth behind this statement, it is important to look into the exact difference between these three types of retailing environments. By mapping their distinctive supply chains, it becomes apparent that the observed tension between current-day retailing channels can be explained by only a small part of the entire fashion supply chain.

In a report of Eurogroup Consulting and GS1 Nederland (2014) it becomes clear that every retail supply chain has the same dimensions, namely '*sourcing', 'inventory and planning', 'handling', 'transport', 'returns'* and *'leftovers'* (p. 22). However, the way in which these dimensions are translated into actual supply chain models differs significantly per retailer. First of all, the *offline* – i.e. brick-and-mortar – store has the following supply chain:

Manufacturer → Distribution Center → Stores → Consumers' home

Figure 3: Own elaboration on the supply chain model offline retail store, based on Eurogroep Consulting & GS1 Nederland (2014, p. 36)

Secondly, the *online* retailing environment can be illustrated in the following supply chain:

Manufacturer → Distribution Center → E-fulfillment Center → 1. Stores (for pick-up) → Consumers' home
2. Consumers' home (delivery)

Figure 4: Own elaboration on the supply chain model online retail store, based on Eurogroep Consulting & GS1 Nederland (2014, p. 36)

Lastly, as the description already suggests, the combination of the *off- and online* store – i.e. brick-and-click store - has a combined supply chain:

Manufacturer → Distribution Center → 1. Stores → Consumers' home

→ 2. E-fulfillment Center → 2.1 Stores (pick-up) → Consumers' home

2.2 Consumers' home (delivery)

Figure 5: Own elaboration on the supply chain model brick-and-click retail store, based on Eurogroep Consulting & GS1 Nederlad (2014, p. 36)

When analysing the *distinction* between on-, offline and brick-and-click stores, it becomes clear that the *manufacturer* and the *distribution center* can be left out the following literature review. The obvious difference lays one step further in the chain: at the 'store'. The e-fulfilment centre – also known as the *web store* – offers two ways of product delivery: directly to the customers' home and via pick-up in the offline store. The offline store on the other hand, requires a physical visit to the store in order to transport the product to the next step in the supply chain: the customers' home.

In order to study the current-day function of specific omnichannel retail environments on the sides of both the retailer and the consumer, this thesis thus focuses on identifying what characterizes the on- and offline channels in terms of strategies and purpose.

Omnichannel retailing

A modern-day way for offline fashion retailers to cope with the current rise of online stores and higher consumer expectations is by creating an omnichannel business model. Accenture (2013) defines omnichannel retailing as "*a synchronized operating model in which all of the company's channels are aligned and present a single face to the customer, along with one consistent way of doing business*" (p. 4). In a shared report PwC and Kantar Retail (2012) add to this definition that the omnichannel approach entails a "*channel-agnostic view of how consumers experience the retailer brand*". This means the offering of experiences to consumers who demand a "*consistent level of experience regardless of channel or mode by which the retail is accessed*" (p. 30).

This fully integrating approach should thus be distinguished from multi-channel models, which are consumer-centric instead of consumer–driven and were based on independently functioning retailing channels. Instead, omnichannel retailing not only knows its customers; but also, it enables retailers to *interact* non-stop with highly demanding consumers and provide customer experiences via the *channel of their preference* (Accenture, 2013). These channels range from offline stores, to web stores and to mobile devices such as an iPad of smartphone (Petermans & Kent, 2013). Moreover, central to the integration of all these channels is the incorporation of enhanced customer service practices (PwC & Kantar Retail, 2012).

However, where does this need for 'experiences' in omnichannel retailing come from?

The Experience Economy

The theory of the 'Experience Economy' is created from a birds-eye perspective by Pine & Gilmore (1998), studying general interaction between supply and demand. The scholars questioned: *how come people pay a few cents for coffee at home, while they're willing to pay ten times more for the exact same coffee at the San Marco square in Venice?* Their conclusion was: consumers aren't only paying for the product itself, but for the entire 'experience'. An experience that was strictly personal and which they will still remember 50 years later. Therefore, Sleeswijk Visser (2009) adds that an experience can't be established at one point in time, hence "*the moment is inextricably woven into past memories and future events*" (p. 14).

Looking into Pine & Gilmore's (1998) theory, the so-called *"progression of economic value*" shows different stages (p. 98), later on explaining the added value of omnichannel stores. Higher stages in this progression are characterized by a larger differentiation of the product and higher pricing. First of all, there is the extraction of (fungible) commodities, followed by the creation of (tangible) goods. Climbing up the ladder, the following stage is the delivering of services. At this level, the actual product you provide is intangible. The last and ideal stage is staging experiences, which developed from intangible (services) to memorable (experiences). Now, the actual product that's being sold is strictly personal, offering experiences that can't be 'sold' twice.

Although 'experiences' based on the theory of Pine and Gilmore (1999) have been subject of research in many closely connected scientific disciplines – "*philosophy, marketing and consumer research, cognitive sciences, design sciences and management practices*" (Petermans, 2012, p. 85) – scientific literature lacks a general consistent definition of the term 'experience' (Sleeswijk Visser, 2009, p. 13).

Sleeswijk Visser (2009) states that the term can in other languages, such as German, be translated into two versions, namely "*Erlebnis*", referring to once-in-a-lifetime experiences of memorable events, and "*Erfahrun*g", referring to day-to-day experiences (p. 14) and over-time obtained know-how and skills (Boswijk et al., 2008; in Petermans, 2012, p. 13). According to the latter, theories such as Pine and Gilmore's (1999) are solely referring to the 'Erlebnis' kind of experience, while the scholar states 'Erfahrung' can as well be a welcome addition to those theories, presenting the skills to improve customers' experiences (p. 14). This can for instance be established by re-incorporating craftsmanship in the products offered.

Since a general definition of 'experience' appears to be non-existent, another approach is suggested by Petermans (2012). The broad range of disciplines that study the concept show that 'experiences' can in fact both occur *with* and *without* market relation (Carù & Cova, 2007a in Petermans, 2012, p. 85). However, when approaching 'experience' with regard to retailing, a market relation between the consumer and the brand is involved. Therefore, the use of the term 'consumer experience' is proposed. 'Consumer Experience' as Petermans (2012) suggests, is "*the personal and subjective response that customers have to any interaction with products, services and different elements of a particular designed market place environment*" defined by Meyer and Schwager (2007, p.118).

According to Diep and Sweeney (2008) "*both the products and the stores contribute to the overall shopping trip value*" (p. 399) which is initiated by interaction between the customer and the two - products and in-store aspects. Moreover, this interaction creates both "*utilitarian*" and "*hedonic value*" during a consumer's shopping trip (Diep & Sweeney, 2008, p. 406). From this perspective onwards, it is interesting to investigate *how* contemporary retailers can send this value-based message – translated into a staged experience – to the consumers by means of an omnichannel store.

2.2 SHORT REVIEW ON THE HISTORICAL DEVELOPMENT OF ECONOMIES

According to Pine and Gilmore (1998), 'the economy' has developed in several phases through history. These phases start with the agricultural economy in which until the 1860s, economic exchange took place around crafts and farming activities. While developing countries still mostly function according to this principle today; developed countries such as the Netherlands have known a variety of following phases since. From the 1860s onwards the industrialization in Western Europe resulted in automatized labour, enabling prosperity, economies of scale and (therefore) the mass-production and –consumption of goods. Since, after an era of improving the efficiency of this machinery work, less physical labour was required for producing these goods, more people could afford attending higher education and practicing 'white-collar' jobs. As a result, the knowledge economy started to exist from the 1970s (Nakamura, 2000). In this period after WWII the demand for tangible products changed into the desire for intangible services (Pine & Gilmore, 1998). In other words, retailing shifted from a product-oriented towards a market-oriented industry, accompanied by creative marketing and sales strategies to attract the right global target audiences. More and more, suppliers expanded their business to foreign markets and differentiated their products – or purely the brand experience around it - in order to fulfil the unique desires of their heterogeneous customers and surpass competition. Through differentiation and attempting to add special value and more so memorable experiences (Pine & Gilmore, 1998) in the lives of the consumer, the creative economy – i.e. new economy (Nakamura, 2000) - arose from the beginning of the 21st century up until now. Gradually, the local knowledge of how to produce goods following a familiar 'recipe' changed into global knowledge of how to creatively sell i.e. 'market' new products (Nakamura, 2000). As a result, the notion of *'creative destruction'* – replacing Adam Smith's (1976) out-dated '*law of the invisible hand'* – arose, stating that creativity is the "*mover in a modern economy*", replacing old goods with new ones (Schumpeter 1942; in Nakamura, 2000, p. 19).

Despite the (economical) success of creativity and innovation since the millennium, there are a number of interesting questions to be raised. First of all, it is questionable what the constant search for new products will do to historical knowledge of crafts. Will these vanish completely out of industries such as fashion, traditionally confederated with skills and artistries? Or could there actually be a return of the crafts visible in modern-day fashion trends?

And next to that, what role will be set out for local communities in this global-oriented field? Will – due to the rise of the Internet – *location* become of minor of even no interest at all in the future creative industries? Or will the 'creative city' be more important than ever, highly connected with the *social* character of creativity and emphasizing on *local* activities, as proclaimed by Scott (2014)? Before answering these questions through a two-sided research, the evolution of the fashion industries will be analysed in order to place them on the below-illustrated, general development of economies.

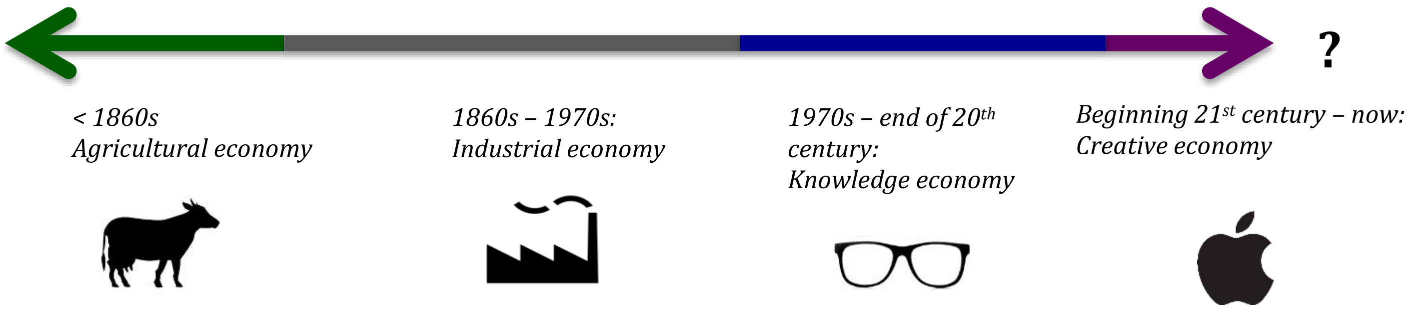


Figure 6: Historical timeline of the development of economies.
Source: own elaboration based on Pine and Gilmore (1998)

2.3 THE EVOLUTION OF THE FASHION RETAILING INDUSTRY UNTIL THE MILLENIUM

In order to place fashion-specific developments into the more general perspective of economic evolution as a whole, the above-illustrated economic phases function as a guideline for dividing periods of fashion retailing industry-related events. At the end of each period, the literature review will zoom in on male-specific happenings in the fashion industry.

2.3.1 < 1860: From craftsmanship to standardization

From the 17th to the mid 19th century, garments were a primary medium of *exchange.* Due to the high costs of hand-made fashion pieces, apparel was seen as a valuable, alternative currency (Schor, 2010). From the 1820s onwards, France followed England's example of industrialization and formed an industry, mass-producing inexpensive, new ready-to-wear clothing (Lipovetsky, 1994). Due to this 'automatizing' development, the labour-intensive, craftsmanship-driven fashion industry started to shift towards a standardized way of producing garments (Cooper, 2011). The creation of the sewing machine can be marked as the onset of this revolution in the making of clothing. After the 1860s, this technical process resulted in the fashion industry into significant tension between haute couture – "*a craft-based production of fashionable luxury goods*" (Aage & Belussi, 2008, p. 477)- and mass-produced confection, as will be described in the following chapter.

From fashion retailing point-of-view, 'shopping' in the agricultural economy did not exist. Instead, until the second half of the 19th century, purchasing garments was called 'buying' (Polese, 2013) which underpins the strictly pragmatic activity of acquiring the predominantly tailored items in small, specialized ateliers at that time.

Zoom on male fashion

While female fashion changed rapidly in this period of time; craftsmanship in the form of tailoring retained its status in male fashion – with as a 'pinnacle': the London Savile Row, which was established in the 1840s and is still iconic today. As stated by Cooper (2011), men have been referred to as "*hidden consumers*" the whole 19th century through (p. 70). The scholar bases this statement on the sober form of male dress during this period. Only a coloured handkerchief or a walking stick could display the man's fashion interests. While England set the trends by introducing tailored coats and suits and innovative measuring systems for the elite part of society; other items in male fashion, such as shirts, became accessible for every man due to the inexpensive factory production of garments.

2.3.2 1860 – 1950: haute couture versus mass consumption of confection

Modern fashion is "*bipolar*" (Lipovetsky, 1994, p. 55) – at one extreme end of the continuum there is haute couture, i.e. made-to-order creations; on the other end there is '*confection*'- i.e. inexpensive, mass-produced clothing. From the end of the 19th century to the beginning of the 20th, fashion became *differentiated* on both supply – techniques, prices and reputations – and demand side - characterizing society that was divided into various classes itself (Lipovetsky, 1994). Furthermore, where haute couture can be seen as rather innovative; 'confection' on the contrary mainly existed from more or less 'copying' the creations of made-to-order labels.

The beginning of the 20th century meant 'breaking with past conventions' in the fashion industry – and arts as a whole-, introducing "*liberating clothing*" (Webber, 2011, p. 84). In the winter of 1857 – 1858, Charles-Frédéric Worth opened a fashion house in Paris in the rue de la Paix. According to Lipovetsky (1994) this house can be seen as the first in line of offering haute couture. Despite Worth's own advertisements on the novelties in the "*top-notch*" creations; the real originality of his house, states Lipovetsky (1994, p. 57) is that he offered garments that were prepared in advance, and later on made to measure for the specific client. From this point onwards, fashion retailing not only involved creativity in the products anymore, but an important engagement in advertising as well.

In 1900 the World's Fair in Paris counted twenty houses of couture, followed by the opening of stores by Lanvin in 1909 and Chanel and Patou in 1919. In 1925 this number had already increased to 72 fashion houses in Paris and after the Second World War in 1959, fifty stores opened in only one year. Haute Couture boosted the French economy and brought the luxury industry to its second place in France's external trade before the Great Depression (Lipovetsky, 1994). Due to international events such as the World Fair's, cultural influences started to show in 1900's fashion. During these events, many countries and colonies introduced their craftsmanship and other forms of "*material culture*" to a broader, global public (Cooper, 2011, p. 70).

After the First World War, this exporting success declined - to only 0.5 percent of all French visible exports – however the fashion - mostly haute couture - industry kept attracting foreign buyers[1]. While their purchasing increased significantly, successful fashion houses started scheduling their first fashion shows, twice a year (Cooper, 2011). During these shows, foreign buyers were enabled to acquire the latest creations, including manuals for reproducing the designs in a simplified version. This way, retailers from all over the world could imitate the haute couture models and mass-produce them for just a fraction of the made-to-order originals. Through this mechanism, customers from all over the world followed the French standards of fashion. As Lipovetsky (1994, p. 59) puts it: "*modern fashion stands out as the earliest manifestation of mass consumption: homogeneous, standardized, indifferent of frontiers".*

As fashion retailing became "*centralized and internationalized*", it also became "*democratized*" (Lipovetsky, 1994, p. 59; Cooper, 2011, p. 69). The former refers in his statement to the ability of customers from every social class to dress in the 'fashion of the day' due to the relatively low costs of trendy garments. It must be said that differences in social rank were still visible despite the democratization of fashion: wealth and social class remained evident by means of fabrics, labels and shapes (Lipovetsky, 1994). Yet democratization didn't only occur with regard to social ranking; the shape of women's wear changed gradually from the beginning of the 20th century onwards, into a "*democratic revolution of feminine appearance*" (p. 61). This type of democratization entailed a wider variety of female's dress, stepping away from the old-fashioned homogeneous way of fashion design and making room for activity and comfort.

As the number of large, department stores increased over time (Polese, 2013) and technologies allowed the fashion industry to introduce a wider variety of colours and fabrics to a larger public, the fashion retailing industry still highly depended on the influence of haute couture. More and more, haute couture found ways to 'teach' the mass about fashion and the seasonal collection, especially through the launch of fashion magazines and engaging celebrities (Blanco, 2011; Lipovetsky, 1994). Especially after the two World Wars, the notion that everybody had the "right" to gain access to fashion gained ground among the public. The idea that the industry was only meant for higher classes became for once and for all taboo (Lipovetsky, 1994). It is in this period that mass-produced dress achieved the status of "*full-fledged fashion product"* (p. 91).

[1] In the fashion industry, the term buyer can have two meanings. 1. Customer that purchases a product in the store; 2. Employee of a brand who selects and 'buys' garments for the collection of the store. In this paragraph, the term buyer refers to the second meaning of the term.

The rise of mass-production could also be observed in the above-mentioned department stores. Stores in the late nineteenth century are characterized by "*glamorous displays and interiors adding value to goods that were often mass produced and aggressively priced"* (Polese, 2013, p. 3). According to the scholar (2013) it is in this period that 'Au Printemps' – a Paris-based department store – next to its brick-and-mortar stores offers a large number of fashion items to International customers via mail order, eventually publishing foreign catalogues in several European countries. These catalogues did not only enable the 'diffusion' of ready-to-wear fashion items internationally; it also inspired and encouraged women to create the designs themselves with a significantly cheaper fabric.

Zoom on male fashion

Not much has been written on male fashion (retailing) in the modern era. The term 'hidden consumers' of Cooper (2011) was still in place, since most fashion-related theory about this period is devoted to women's dress. In the scarce paragraphs of fashion history that do focus on attire for men, it becomes clear that until the end of the nineteenth century, men mostly expressed their sense of fashion indoors (Cooper, 2011). In the domestic sphere, men added a sense of colour and embroidery to the – still – rather conservative clothing styles, introduced by English dressmakers. At the beginning of the twentieth century quality and cut remained the foundation of male fashion, yet patterns and coloured coats now gave room for a modest level of self-expression *outside* the private domain (Cooper, 2011).

From the 1900s onwards – while Parisian designers functioned as international trendsetters in women's fashion – London remained the 'source of style' for menswear (Webber, 2011; Merlo & Polese, 2006). The latter more and more introduced varieties within motifs and basic colours, however compared with female dress fashion for men remained monotonous, yet elegant. The qualitative, expensive male attire of this period contradicts the rather functional clothing styles that erected during the two World Wars and the recession (Webber, 2011).

This functionality of dress was represented in garments similar to the uniform of the military troupes as well as in attire made for sporting activities and more formal suits from lightweight fabrics. From this time onwards, New York started to position itself as sportswear fashion capital (Webber, 2011; Merlo & Polese, 2006). However, dressing more functional doesn't mean men weren't 'fashion-conscious'. In fact, in the mid 1930s, trendy looks for men were published in magazines such as *Apparel Arts* (now GQ) and *Esquire* (Webber, 2011), monthly updating its audiences on the status quo of the fashion industry.

2.3.3 1950s – 1970s: the rise of ready-to-wear in the postmodern age

Paradoxically, from the 1950s haute couture faded to the background while still initiating creative new forms of apparel (Lipovetsky, 1994). Only a few years later, consumers started to respond to individualized lifestyles and preferences (Blanco, 2011). This 'consumerist spirit' resulted in drastic organizational changes among fashion labels. It became evident that the influential role of haute couture had shifted into a *co-existing* status - rather than a trend-defining one - with confection dress as an "*autonomous fashion centre*" (Lipovetsky, 1994, p. 92). To the 1970s onwards, haute couture labels bundled the strengths of *creativity* in designing with *mass-production* and opened flagship-stores with own collections of ready-to-wear garments (Blanco, 2011).

After World War II – a destructive period for the Parisian fashion industry - New York and London had presented themselves as attractive alternatives for Paris' previous status as fashion capital, the former trendsetter continued claiming this title (Blanco, 2011; Merlo & Polese, 2006). By means of qualitative, modern haute couture design, the French capital regained its status as one of the world fashion leaders, but not without constant international competition. Next to the United States and the United Kingdom, another fashion leader revealed itself: Italy (Merlo & Polese, 2006). While several Italian cities boasted their traditional craftsmanship and artistic identity on the global market, only one could be "*the* Italian capital of fashion" (p. 424). According Merlo and Polese (2006) Milan was the evident winner, combining both a variety of specialized resources through industrialization and the ability to reach the demand side e.g. by being the home of important Italian fashion magazines.

However, magazines weren't the only medium that rapidly influenced the global fashion industry in the late twentieth century. The arrival of television made it easier to promote fashion labels and trends among specific, yet large target audiences. Also, this technology enabled consumers to follow and imitate the styles of their 'icons' such as Audrey Hepburn, the Beatles and Jackie Kennedy (Blanco, 2011). As a backlash against "*the establishment*", sub-cultures such as hippies started personalizing garments with e.g. tie-dye and patches with peace signs (p. 101). This can be seen as first steps towards the 'mass-customization' as we know it today.

Furthermore, from the 1960s onwards, fashion stores started to experiment with brand communication in the form of interior design and other visual media – e.g. window store design (Petermans, 2012). This phase is accompanied with a shopping emphasis on *service,* rather than on products alone, significantly urging retailers to focus on intangible retailing functions – such as 'store atmospherics' (Kotler, 1973; Pine & Gilmore, 1998).

Zoom on male fashion

In the second half of the twentieth century there was another phenomenon to be witnessed. Until this point, fashion had mainly focused on women. However, attributed to the urge for equality and emancipation between the sexes, this 'exclusion' of male fashion ceased to exist. According to Lipovetsky (1994), certain labels produced *"avant-garde men's ready-to-wear lines*" (p. 107). Leaving the conservative stiffness of former male fashion in the 1960s, these new lines took a step towards the more 'cheerful' and creative women's fashion.

Male fashion magazine Esquire called the shift in attire for men the "*peacock revolution*" referring to the sudden outburst of "*colour, bold patterns and decorative details*" (Blanco, 2011, p. 102). The rules and restrictions that dominated the fashion industry for men for centuries now gave way for personalized designs and active consumer participation through the combination of several fashion trends into one unique style. Although this extreme change vanished almost completely after the 1960s, the sense of individuality and freedom in style still dominates the contemporary fashion industry.

Nevertheless, the end of the so-called '*female monopoly of fashion'* (p. 108) didn't result into an indistinction between the dress of two sexes. While 'masculine clothing' is highly accepted in women's fashion; Lipovetsky (1994, p. 108) states that men's attire is still restricted to two logics, namely the fashion of 'sportswear' and the "non-fashion of the classic costume". Admittedly, it is this restricting characteristic of male fashion that explains why labels are mostly famous for their women's collections and therefore why most advertisements in the fashion retailing industry have been devoted to promoting these feminine collections. Also, next to masculine expressions in female garments, Lipovetsky (1994) emphasizes the desire of both sexes to – to a certain extent - differentiate themselves from another by e.g. wearing lipstick or by growing a moustache.

To summarize, the blurred lines between male and female attire thus opened up a new market for open-minded, masculine fashion, without resulting into homogenous demand. Main focus of designers and retailers in the end remained on the female side of the fashion industry, while crucial distinctions between the two sexes – and their fashion expressions - were still maintained.

2.3.4 1970s – end of 20th century: towards the millennium – fragmentation and innovation in the fashion industry

In the 1970s the communicating role of television between trendsetters and –followers continued. This development resulted in further fragmented segments of fashion demand (Aage & Belussi, 2008). Apart from the democratization of fashion in the form of ready-to-wear collections in the first half of the twentieth century – which, as described below, also found his way in the second half of the era – this fragmentation presented itself in the further expansion of sub-cultures. More and more, consumers imitated styles presented in movies, video clips and commercials. Street styles from London and New York such as Punk, Hip-hop and Glam rock created successful niche markets for designers and labels (Blanco, 2011). Next to these 'rebellious' sub-cultures and non-Western influences from Asia and Africa, more conservative consumers in fact returned to following dressing guidelines, following 'dress for success' strategies, extensively described in influential books.

According to Lipovetsky (1994) the rise of ready-to-wear collections meant in the 1980s that the made-to-order age of haute couture and therefore the 'bipolar' system of '*confection*' versus '*haute couture'* was past. According Blanco (2011) this phenomenon has been labelled "*decade of the designer*", referring to the rise of in designer ready-to-wear and "*brand labelling on the outside of clothes*" (p. 106). Furthermore, the 1980s is characterized by the integration of new, innovative features in 'old' classical fashion designs. Lillethun (2011) defines this phenomenon as "*historicism*", i.e. the "*appearance of style elements from the historical past as themes or elements in contemporary fashion*" (p. 119).

The 1990s presented the rise of structural fashion-related changes that continued in the millennium. First of all, trade agreements in combination with a growing emphasis on *low production costs* resulted into structural outsourcing of the production of Western fashion designs towards developing countries. This significant shift out of the formerly industrialized nations meant a dramatic *drop in Western domestic manufacturing* and an increasing *success of non-Western designers* such as Vera Wang (Blanco, 2011).

Furthermore, a number of innovations – described later on - initiated the business of *customization* and *marketing* garments "*glocally*[2]", reaching large numbers of global customers. One of these innovations - a crucial industry-changing phenomenon - mainly enabled this global success: the *Internet*. The Internet in the late 1990s had the same effect as the introduction of the television in the 1960s, namely opening up parts of the world and the fashion industry that weren't visible or accessible for the public due to locational constraints. At that time, millions of Internet users were able to study trends on a global level, constantly gathering pre-purchase information and sharing opinions from their homes (Arora & Vermeylen, 2013). The notion of '*crowd wisdom*' seemed to result into a more 'democratic' manner of evaluating observed trends, however at the same time expert guidance was required more than ever in order to provide qualitative evaluation of the experience good in the overload of confusing amateur information.

Next to that, access to the World Wide Web also enhanced consumers' awareness of social and environmental issues, connected to the production and distribution of fashion items. As a reaction to the eco- and labour-unfriendly mass-production of 'fast fashion goods', more and more retailers started to introduce fair-trade collections. Yet, whether or not these actions of corporate social responsibility were introduced purely based on philanthropic motivations has been questioned in the literature. According to Blanco (2011), a number of retailers

[2] Glocally – "*on a global scale with attention to local needs*" (PwC & Kantar Retail, 2013, p. 44)

especially aimed for attracting new clients by appealing to global concerns. However, barring the underlying incentives for creating garments in a sustainable manner; fact is that this movement has brought a new perspective to the current-day, global fashion industry and is still going on today.

From the 1970s up until the millennium, brand communication became fully integrated in store design (Petermans, 2012). Slowly but surely, the focus on 'service' shifting towards an emphasis on 'experiences' (Pine & Gilmore, 1998). Next to this 'hedonic' store functions, aiming for a consistent, and above-all, pleasant store visit, functional features of the retail environment remained of high-importance (Kent, 2003). By 2000, especially high-end fashion labels extended the notion of 'store experience' to the design of minimalistic, hard-to-find stores with small collections and "*mysterious forms of communication and promotion*" (Kent, 2003; in Petermans, 2012, p. 49).

Male fashion

As mentioned above, from the second half of the twentieth century onwards, male and female fashion industry developments started to move more synchronously. While women remained a dominant target audience for fashion-forward labels; men publicly started to express their interest for fashion as well in this period. Next to Esquire and GQ, another influencing fashion magazine focusing on men followed in the early 1970s, namely 'L'Uomo Vogue' – also known as 'Vogue Hommes'[3]. From the 1970s onwards, this upcoming attention for male fashion was acknowledged and celebrated by the organization of the first 'Pitti Uomo'[4] - an important International trade fair in menswear and masculine trends, held in Florence, Italy - in 1972.

The shift of men becoming 'consumers' instead of purely 'producers' might also have to do with another factor. Bakewell et al. (2006) state that the 'new man' has become more independent from the other sex and - as a result – became a shopper himself. Moreover, this generation isn't looking for pure utility anymore, but is interesting in aesthetics instead. In fact, male fashion seems to undergo the same development as female fashion did a few decades before. Hence, where the magazines for men were published 30 years after fashion magazines for women; interest in fashion among a broader public seems to ascend a few (around four) decades later as well.

This observation seems to claim that male fashion is simply *following* female fashion. Yet is this really the case? Other sources presented another perspective. Literature in which a clear distinction between male and female fashion has been made is unfortunately rare. To what extent these observed, female fashion-oriented events are also reflecting the status quo of the

[3] Information retrieved from: http://en.vogue.fr/vogue-hommes
[4] Information retrieved from: http://www.pittimmagine.com/en/corporate/about.html

masculine part of the industry is therefore debatable. Hence, as mentioned above, male fashion historically has proven to be more conservative and trend insensitive (Lipovetsky, 1994), which might suggest a relatively low impact of trend imitating fast fashion labels.

In order to study a clear relationship or distinction between the fashion developments of the two sexes, the following paragraph will illustrate the evolution of these industries in the form of a timeline. After doing so, the status quo of the fashion industry – focusing on off-, online and mobile retailing trends - will be analysed in existing literature.

2.3.5 Conclusion: the evolution of the (fe-)male fashion industry

As discussed above, a number of developments suggest a *following* movement of the male fashion industry with respect to the female variant, rather than a *distinctive* one. Yet, when illustrating the evaluation of both industries in a combined timeline, another conclusion can be drawn. Hence, where female fashion developments show a high level of volatility along the timeline; despite clear changes, the male fashion industry seems to a significant level of trend insensitivity.

First of all, 'tailoring' has proved to be of significant importance throughout the entire history of male fashion. London's Savile Row traditionally set the – modest - trends in the industry and is still present as an influential icon of *sartorialism*[5]. When comparing this to female fashion, it becomes clear that *if* there is in fact a following trend to be observed at all, it is the female fashion industry following the fashion industry for men in this respect. After a drop of tailoring around the 1970s, male fashion regained its presence in the form of customized products and made-to-measure garments. The female industry has picked up this trend as well, which is also visible in the slight decrease in the presence of confection lines in this period.

Secondly, while tailoring retained its status during the entire studied period; both confection and haute couture only became visible in the daily lifestyles of men form the 1970s onwards. Before this point, male fashion mainly focused on tailoring and smaller-scale production of confection shirts and underwear. From the knowledge economy onwards, it is apparent that male confection and haute couture became more central in the fashion industry and comprehensively acknowledged among consumers. This development might be recognized as a following movement with respect to female fashion, yet a high level of volatility in this trend remains absent.

Up until this point in time the two fashion industries seem to play a 'cat and mouse game': from time to time they follow one another, subsequently going their own way for a while. If this can be captured in a clear cadence *or* in an image of a purely random movement, both time ànd

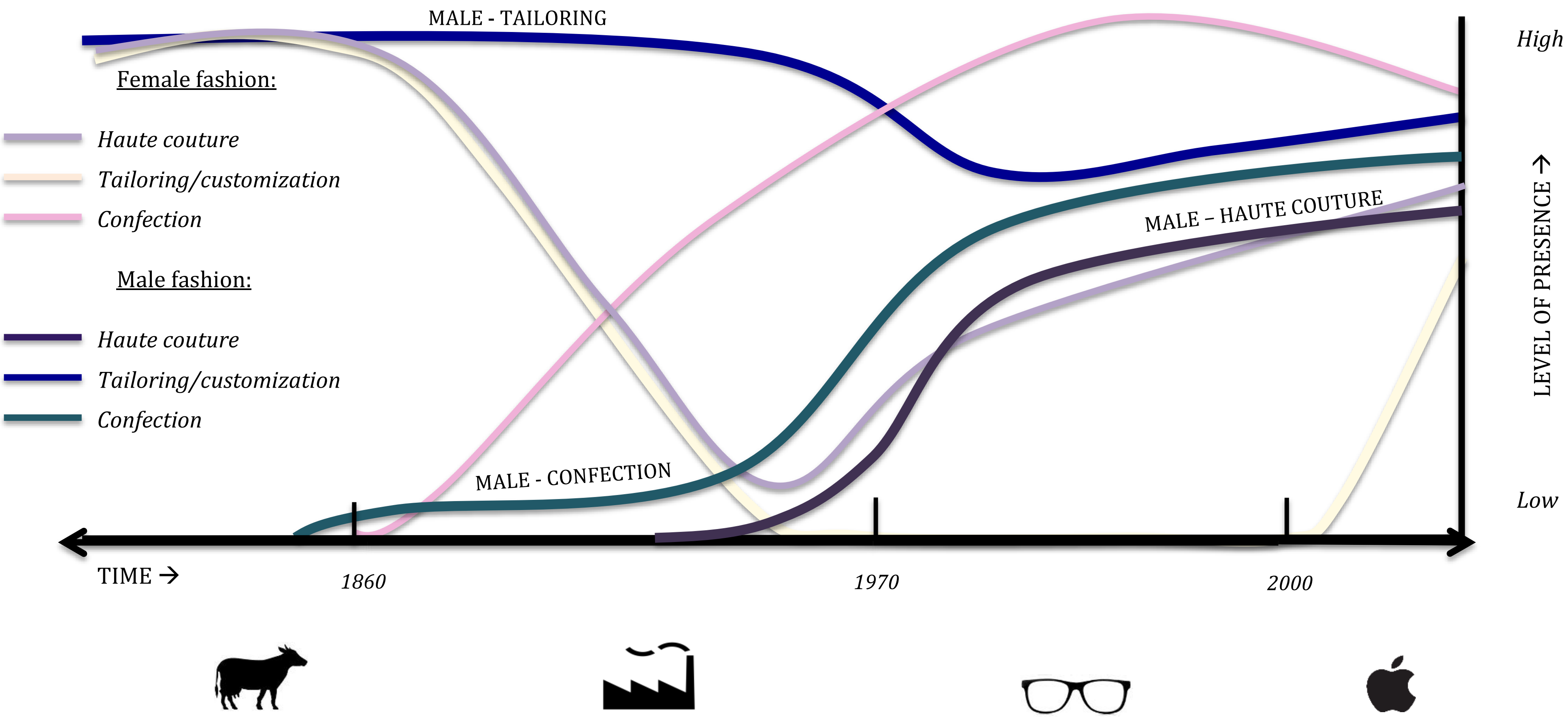
[5] Mariam Webster Dictionary: definition of 'sartorial': *"of or relating to a tailor or tailored clothes; broadly: of or relating to clothes <poor sartorial taste>"*

future research can tell. For now, the only scientific conclusion that can be drawn from the below-illustrated timeline is that male and female fashion should be approached as two closely related, yet distinctive industries. Moreover, they act in the same society with accessory trends and developments, however their reaction to these external processes is yet rather different.

What these contemporary trends exactly entail today will be defined in the following part of this theoretical framework; the reaction of the male fashion retailing industry to these influential developments is subject of the empirical side of this thesis.

Figure 7: Visualization of the timeline of (fe-)male fashion developments

Source: own elaboration



2.4 THE STATUS QUO OF THE FASHION RETAILING INDUSTRY IN THE CREATIVE ECONOMY

After examining the fashion retailing industry-related developments throughout four types of economies, this chapter will zoom in on the *current* trends and movements in the creative economy. From the year 2000 onwards, there are a number of developments observable that (in-) directly changed the fashion retailing industry of the 'pre-millennium' era. Significant examples are the substantial emphasis on 'experiences' in modern-day brick-and-mortar retailing environments and next to this, the introduction of web stores. Due to the noteworthy level of change this introduction has caused in the industry, this chapter will be divided into modern-day fashion trends and omnichannel retailing functions.

WHAT IS SOLD?

2.4.1 Trends in the contemporary fashion industry

Before looking into the trends and strategies of the (omnichannel) fashion retailing industry, this chapter will firstly examine the recent developments of the fashion industry in general according to the literature. These developments range from the tension between fast and slow fashion to the rise of mass customization.

Curatorship

As a result of the seemingly shifting role of offline stores through the overwhelming success of web stores, a number of scholars have observed changes in the functions of the 'brick-and-mortar' shops. Marchetti (2009) formulates an entire new role for future offline fashion stores. The scholar states that certain canonical high-end labels such as Prada have already incorporated retailing-strategies in which garments as an element of the store's interior are minimalized. In this case, the store rather becomes gallery or artistic gallery instead.

From this point of view, the role of retailers will shift towards a form of curatorship, in which fashion as a product is carefully selected as a piece of art in the overall customer experience. Despite – as motivated above - the common practice of adapting and implementing customer experience design in general, modern-day offline fashion retailing; whether this phenomenon will expand to lower segments of the fashion industry as well remains questionable. Audrey and Judge (2012) offer a backlash to Marchetti's (2009) perspective; the scholars state that an omnichannel integrated offline store should be more than a showroom in order to survive. Hence by disappearing as a channel via which consumers easily *purchase* fashion items, it is likely that "*price and convenience, rather than brand, are the key motivators*" to visit a store (p. 34).

The notion of curatorship isn't purely restricted to the supply-side of fashion. Hence, on the demand side, it can be found as '*mass customization',* a phenomenon that refers to the "*mass production of individually customized goods and services*" (Pine, 1993, p. 48). As the experience economy – (Pine & Gilmore, 1999) described earlier on - induced the high demand for unique, memorable experiences, retailers became more aware of the power of co-producing these experiences *with* consumers. A successful way of doing so in the fashion industry is by offering customers the possibility of adjusting certain features within fixed clothing designs to the individual's personal taste. This way, consumers are able to 'curate' a unique wardrobe in which differentiation and customer experience are fundamental, while (production) costs remain relatively low due to overall prefixed designs.

Fiore et al. (2004) state that mass customization may "*increase value for the customer through the development of differentiated, unique products and services*" (p. 836). More importantly, according to the scholars this new trend enables the offering of memorable experiences, as firstly described by Pine and Gilmore (1999). There are two ways of co-creating garments with customers, namely "*body scanning for a better fitting product*" and secondly, ***"****co-designing for a unique aesthetic design*" (Fiore et al., 2004, p. 838). Both types of mass customization contribute to the added value of possessing a unique product as well as partaking in the experience of personally designing it.

Co-designing fashion items in the form of *mass* customization doesn't necessarily entail the consumers' freedom of entirely adjusting a design to his wishes. According to de Raeve et al (2012), mass customization-oriented supply chains are designed for low cost production. Therefore, the items range from "*pure standardization"* to '"*full customization*" (p. 5). As the level of uniqueness becomes higher, so does the price of the garment. In order to ensure satisfaction at both supply and demand side, the supply chain should thus find the right balance between low pricing and high distinctiveness. The latter requires a risk-reducing role of the retailer, since the uniqueness of the garments emphasizes the uncertainty characteristic of this experience good (de Raeve et al., 2012).

The paradox of fragmentation and polarization through fast-fashion

Next to the understudied relationship or competition between contemporary on- and offline fashion retailing and the introduction of 'curatorship' in the industry, there's another tension to be observed in the current industry-related literature. A tension between 'fast fashion' versus the rise of sustainability-conscious 'slow fashion', which seems to produce a certain level of both fragmentations and polarization among modern-day fashion labels.

D'Aveni (2010) describes the phenomenon of fast fashion as *commoditization* of an industry that was once known for its fine art. As a result of the before mentioned 'end of the bipolar fashion system', international low-end or middle segment brands started to imitate the designs of high-end designers. Due to the invention of superior supply-chain technologies, these imitations could be brought to the market in less than six weeks (Hemphill & Suk, 2009). Contrary to the tradition of presenting two collections per season; fast fashion labels were now able to create new collections every two to three weeks (Allwood et al., 2006). Simultaneously, the interior of stores changes accordingly (p. 11).

It should be stressed that the garments of the two biggest fast-fashion labels H&M and ZARA haven't been created based on copying; instead, these labels use their own in-house designers to bring their own collection within the observed trend – i.e. "*differentiation within flocking*" (Hemphill & Suk, 2009, p. 1172). However, what is alarming is the fact that fast fashion induces '*hypercompetition*' in which middle and high-end competitors are unable to keep up with the pace and economies of scale in which fast fashion labels produce 'disposable' i.e. unsustainable garments according to the latest trends (d'Aveni, 2010; Allwood et al., 2006). According to d'Aveni (2010) middle segment and high-end competitors of the fast fashion producers can overcome this concern by either undermining the thread by offering even lower prices – i.e. fighting fire with fire -, by expanding their distribution channels or by offering added value that these labels simply can't supply: namely "*quality*" and "*craftsmanship*" (p. 2-3).

As stressed by d'Aveni (2010), one way to outperform fast fashion discounters is by (re)emphasizing the added value of superior quality of supplied garments. By taking a side step from the 'discounter', their dominant market power can simply be avoided. This side step entails moving towards the creation of high-end garments, which gradually results into polarization of the industry. Hence, competitors are forced to outperform the discounter by either offering lower costs - moving towards the lower end of the fashion-industry segments - or superior quality - moving towards the high-end segments.

As mentioned above, the upswing of fast-fashion labels didn't only result into polarization of the industry. Paradoxically, the technological possibility of efficiently mass-producing haute couture-inspired garments also enabled the high-end fashion labels to introduce ready-to-wear designs (Lipovetsky, 1994; Blanco, 2011). By expanding their collections and using vertical integration in the form of so-called by-products – such as accessories (Lavanga, 2012) – these labels stimulated a rather fragmentized fashion industry. This tension between on the one hand *polarization* and on the other *fragmentation* seems to result into the disappearance of a clear middle segment while stimulating the growth of fragmentized, niche markets. This movement might give room for the growth of mass customization as 'the new middle segment'. Yet, investigation of the latter is not the aim of this master thesis.

Slow fashion

The rapid increase of low cost-production and overseas manufacturing related to fast fashion practices resulted into two significant concerns for the fashion industry, namely pollution and the dependence on natural resources (Brydges et al. 2013). Especially the non-transparent and untraceable character of the global supply chains led to a controversial debate regarding the absence of clear industry-related sustainability policies. As a backlash to these global discussions, more and more 'slow fashion' labels started to exist, emphasizing the local design and production of garments in order to "*control all aspects of the commodity chain*" (p. 3).

Pookulangara and Shephard (2013) define slow fashion as "*a philosophy of attentiveness, which is mindful of its various stakeholders' respective needs (with "stakeholders" referring to designers, buyers, retailers, and consumers) and of the impact producing fashion has on workers, consumers, and eco-systems*" (p. 1-2). In their definition, the scholars (2013) not only focus on the 'local' aspect of slow fashion but also emphasize the role of a more 'transparent production' process and the creation of 'longer usable' garments. Combined, these three aspects form a holistic "*slow approach*" (p. 201) in which the value of fashion items is induced by the 'unique story it tells'. Yet, it should be taken into account that the term 'slow' isn't intended to be taken literally. Instead, it is meant as a challenge for fashion labels to "*make the effort to include sustainable, environmental, and ethical practices into their designs, to select production methods that emphasize quality, craftsmanship, and experienced labor, and to educate consumers so that they can play an active role in making informed decisions regarding their apparel selections"* (p. 203).

Craftsmanship - Sartorialism

As defined above by Pookulangara and Shephard (2013), one element of sustainable fashion retailing is incorporating *craftsmanship* in the production process. Especially in male fashion, this trend is observed and mostly referred to as sartorialism. According to Klamer (2012), craftsmanship "*involves the skilled working with the hands to create something of use for a purpose where the skills require training and usually continuous practice*" (p. 5). Moreover, in order to classify as a craftsman, both the characteristics of 'working with hands' and 'required skills' should be present in the performed activity.

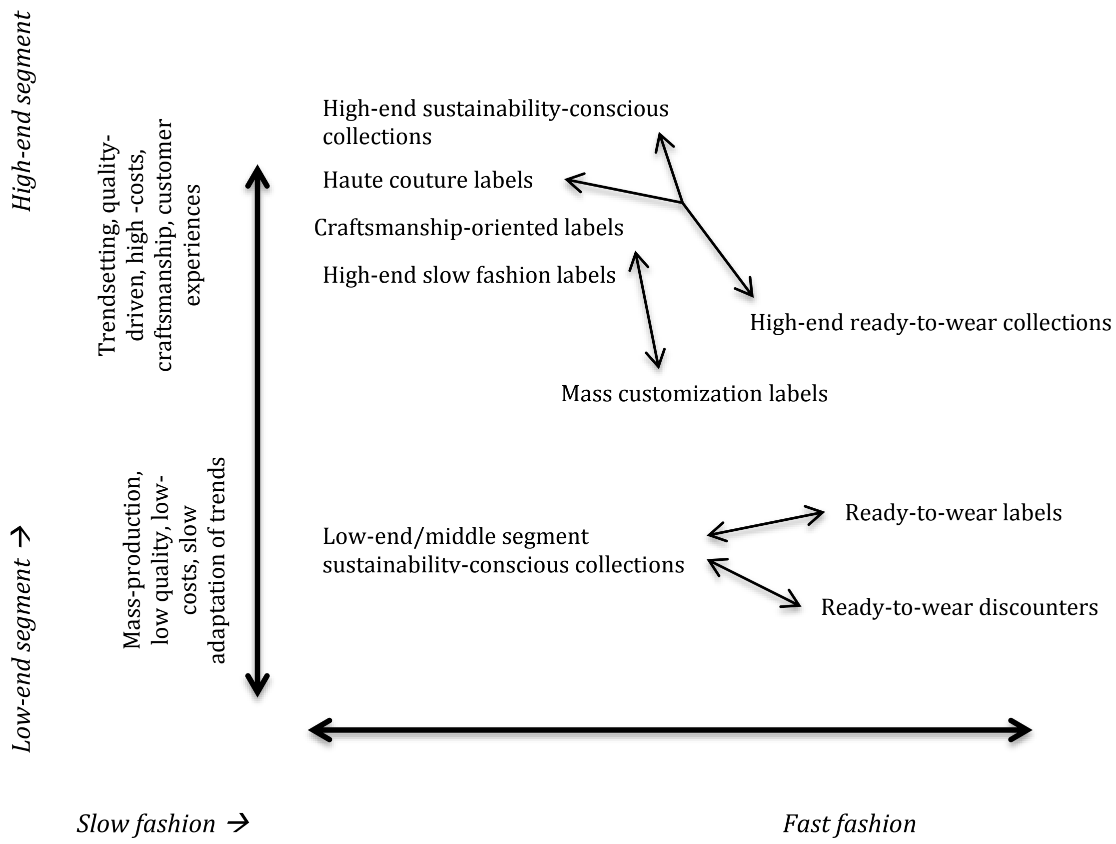
According to de Raeve et al. (2012) the notion of craftsmanship in fashion is highly connected with the trend of fashion 'co-design', since higher levels of customization require unstandardized, qualitative labor that can't simply be done by machinery. As described earlier, tailored – i.e. crafted – garments are therefore accompanied with higher prices, shifting this trend towards the high-end segment of the fashion retailing industry. Fionda and Moore (2008) support this notion, by demonstrating that especially the luxurious fashion items incorporate craftsmanship to a high degree. Yet, the more craftsmanship is interspersed by standardized, machine production, the more the segment shifts towards the *mass* customization side of fashion; its affordable retailing ‘sister’. The latter enables the acquaintance of semi-crafted garments among larger audiences.

Overview of the contemporary fashion segments

By indicating the most prevalent trends in modern-day fashion, it becomes clear that traditional segments have had to make way for innovative, industry-changing alternatives. Apart from the already familiar abolition of the bipolar fashion system – solely entailing haute couture and confection practices-, several developments since the creative economy resulted into an even more fragmented industry.

Now - anno 2014 – it is time for an updated review of currently existing, interconnected segments. Segments that – as will be motivated later on - are to some extent present in either the online or offline retailing environment, yet which characteristics clearly support the *added value* of an omnichannel fashion retailing business model. How this added value can be defined in terms of functions of different retailing channels will be demonstrated in the next paragraph, after schematically mapping the contemporary fashion segment below. This illustration presents the observed fragmentation among labels and collections, as well as the shift of the polarization movement of most brands towards either low- or high-end segments. The latter currently seems to be interrupted by the arrival of mass customization-oriented labels, seeking the balance between low pricing and high differentiation.

Figure 8: overview of contemporary fashion retailing segments:



Source: Own elaboration on the contemporary fashion segments

The above-illustrated trends indicate how the fashion industry has changed since the millennium with respect to the *products* it sells to its customers. In other words, current literature predominantly described *what* is sold. Yet, being that 'stores' are an important communicating intermediary in the fashion retailing industry, it is interesting to analyse how the above-mentioned trends are related to *where* and consumers buy their fashion goods. The following paragraphs will illustrate the role different retailing channels play in connecting this supply to demand.

WHERE IS IT SOLD AND _WHY_ THERE?

2.3.3 The role of offline retailing environments

Defining the role of contemporary offline fashion stores isn't a new topic in the scientific and professional field. The issue regarding the development and sustenance of these stores has in fact been put on a pedestal several times in order to study it from many angles.

Petermans (2012) defines the presence of a "*physical setting wherein the in-store atmosphere functions as a kind of 'package' surrounding the product*" as being one of the most important advantages of offline shopping (p. 54). This package enables the appeal of the product or brand to the customer, something that can't be established purely by online retail. Furthermore, the scholar states that in a society, marked by a constant overload of *information* and consumers with high expectations, it is hard for online retailers to draw the attention of the consumer. The years of evolution of the brick-and-mortar stores now results in a lead with respect to their online, new coming competitors, for giving demanded value to consumers by providing – amongst others - an '*experiential store atmosphere'* (Petermans, 2012, p. 55).

Scarpi et al. (2014) attribute the difference in functions between on- and offline stores to the consumer's shopping goal. Where online shopping is mainly focused on efficiency and rationality; offline stores mostly function as an element of *hedonic* or *recreational activity*. Carù and Cova (2003) support this notion by stating that contemporary consumers seek and appreciate multi-sensory aspects of shopping - such as seeing, touching and trying on the product - combined with imagery and emotive aspects. From this perspective, the offline store can be approached as a "*socio-economic means to socialize, to enjoy oneself and the company of another person while making given purchases*" (p. 272). Based on Pine and Gilmore's (1999) four realms of experience, Carù and Cova (2003) state that the desired memorable 'flow' experience – defined by Csikzentmihalyi (1997) as a state-of-mind in which one feels completely absorbed by a certain activity - derived from this hedonic shopping activity, results from an ideal combination of active customer participation and its connection to a physical retail environment: i.e. the offline store.

2.3.4 The role of online retailing environments

Online shopping, i.e. e-commerce, has shown significant success since the millennium. In fact, the Statistics Netherlands (2013) – hereinafter referred to as CBS – has reported that the Dutch proportion of Internet users that shop online has grown from 55 to 80 percent in the period of 2005 to 2012. Moreover, CBS (2013) has concluded that seven out of ten users can be labeled frequent e-shoppers. When looking at the fashion retailing industry specifically, 47 percent of the labeled male frequent online shoppers purchased fashion-related products. CBS (2013) concluded that while 'traveling, vacations and accommodations' is still the largest category of online purchases; the category 'clothing and sports products' shows the largest growth.

Ever since this rise in e-commerce, many scholars have debated the reason for this substantial growth (Scarpi et al., 2014). The underlying question was: do consumers shop online *to buy* or *for fun*? According to Scarpi et al. (2014) shopping to buy can be seen as *goal-*

oriented, emphasizing the *convenience and comfort* of minimizing time through browsing and easily comparing items via a home computer. Petermans (2012) adds that consumers shop online because of the wide variety of goods and services.

In the report 'Retail 2020' of Jones Lang LaSalle (2010), this movement is also recognized. According to their forecast, by 2020 the accessible Internet will provide even more information regarding real-time prices, while demand expectations rise with regard to consumer services and "*crowd-pleasing experiences*" (p. 5). While the former forces the supply side to keep prices low; the latter adds new costs. Costs that are focused on stimulating the 'shopping for fun' side of e-commerce.

Shopping for fun can be labeled as *fun-oriented* shopping, *enjoying a shopping experience* through aesthetic web design and other *"features of virtual reality"* (p. 258). Especially the latter might compete heavily with offline retailing environments, since their main focus seems to be on offering consumer experiences rather than on utilitarian purposes. Yet, as argued by Scarpi et al. (2014) there is a form of parallel use to be observed, in which multiple channels are visited for satisfying different needs. This – later on elaborated on as 'omnichannel retailing' – combined use of retailing channels enables the consumer to e.g. search for information and social networks on the internet, while actually purchasing the fashion good in the brick-and-mortar store (Scarpi et al., 2014).

Lastly, as mentioned before, fashion- i.e. experience - goods are highly connected with uncertainty. This uncertainty finds its origin in the difficulty of assessing the quality before actually purchasing it. In offline retailing this uncertainty is often reduced, due to the above-mentioned multisensory aspect of the brick-and-mortar stores (Carù and Cova, 2003). Consequently, in online retailing, the absence of a physical setting which engages all five senses is identified as being a strong limitation of e-commerce (Petermans, 2012). The – tangible – package that is offered via the offline retailing channel enables a holistic consumer experience, which can't be equaled (yet) by purely - intangible - online retail.

2.3.5 The role of mobile retailing environments

At the beginning of the 2010's, another technology as an extension of e-commerce began to rise: m-commerce (Magrath & McCormick, 2013). *"M-commerce is the extension of e-commerce where products are purchased via mobile devices over a wireless network rather than their home computer"* (p. 100). According to a report of GFK (Wolters, 2013) this retailing channel is on the rise in the Netherlands, covering 37 percent of total online sales, with the expectation of growing towards 75 percent by 2020.

There are three mobile fashion retailing channels, namely the native app – "*the retailer's application, downloaded onto the phones desktop from the app store and offers an optimized* *shopping platform"*; the un-optimized web site entered via the mobile browser; and the retailers web site "*optimized into a web application accessed via the browser*" (p. 100).

According to Petermans and Kent (2013), m-commerce in fashion is "*still considered as a kind of investment in the experience around the brand, products or services that the retailer has to offer"* (p. 3). This experience is mainly made possible by the ongoing enhancements regarding user interface, which – according to PwC and Kantar Retail (2012 – enable a *"seamless and effortless"* connection between the consumer and the retailer (p. 16). Magrath and McCormick (2012) support this statement by indicating that personal communication increases 'brand-consumer relationships', while content rather than design mostly leads to the perceived consumer experience. However, the level of 'experience' that is perceived by customers via mobile devices - compared to on- and offline retailing channels - remains subject of future studies.

2.3.6 The rise of the omnichannel approach?

As can be concluded from the above-motivated roles of off-, online and mobile retailing channels, every channel has its own advantages and downsides. For example, the online fashion retailing figures presented by the CBS (2013) are significant and when looking at the prosperous development of online shopping, the question of whether or not there is a future left for offline retail environments becomes even more pressing. Yet, there are some arguments in favor of the brick-and-mortar stores to be found. The physical setting in offline stores for instance, creates extra value for consumers in terms of multisensory experience and recreational activity (Petermans, 2012; Carù & Cova, 2003).

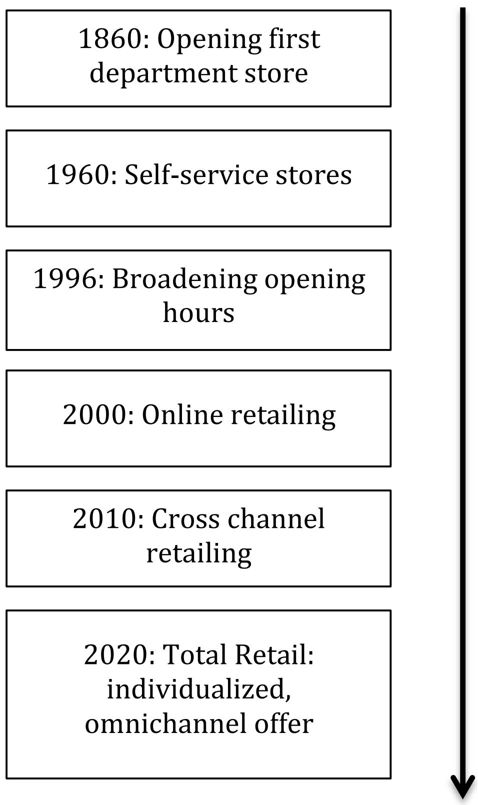
Providing this so-called 'value' to consumers might save offline stores from succumbing to the overwhelming success of online retailing. Next to that, the performance of purely online-focused fashion retailers seems to show operational limitations as well. On January 10th 2014, the Dutch national news (NOS) reported that in December 2013 a number of well-known web stores – amongst others (fashion) retailer Wehkamp - were unable to meet customers' large (holidays-related) demand. As a result, 500,000 products were delivered too late in the Netherlands. Research of the NOS showed that 15 percent of the duped consumers participants find 'late delivery' a reason for not purchasing products online for the coming year. Experiencing the limitations might thus draw consumers back to the offline retail environments.

Next to this, Magrath and McCormick (2012) add that online stores have a higher chance of survival in case of a clear connection with an offline brand. Hence offline brands can use their established market power to "*accelerate their success online*" (p. 99). A successful way of doing so is by combining these channels into a *"hybrid of 'clicks and bricks' bringing the advantages of both formats together under one retailer"* (MacGillivray & Hahn, 2003, p. 41). In other words, by being aware of all strong and weaker points of existing fashion retailing channels, a fully integrating business model can be created in which these channels complement instead of conflict each other.

The notion of omnichannel fashion retailing is rather scarce, yet trending in – academic - literature. As Petermans (2012) states, it is of growing importance for retailers to be "*on the same wavelength*" as consumers (p. 54). Since consumers have shown to purchase fashion goods via multiple retailing channels for different purposes, the creation of business models in which all these channels present their unique added value seems a *future* way to success. With emphasis on 'future' since descriptions of this new phenomenon can only be found in forecasts based on trends, rather than solid empirics.

The expectations of omnichannel business models seem rather consistent and prosperous. Based on a research regarding the development of retailing by GFK (Wolters, 2013) predicts the following evolution, presented in figure 9:

Figure 9: Forecast on the evolution of retailing
Source: own elaboration based on Wolters (2013, p. 26)



In this development, existing sales channels such as the offline and web store will be supplemented with the usage of smartphones and tablets in order to offer a total, holistic experience (Wolters, 2013) at the exact same place as where the consumers are (Accenture, 2013). The difference between cross channel – i.e. multi - and omnichannel retailing lies in the fact that their connection shifts from '*competing* and *independent'* towards '*complementing* and *integrated'* (Accenture, 2013).

Another aspect of omnichannel retailing is related to the message retailers send to their consumers via a retailing environment – i.e. the store. In the 'cross channel retailing' period, this message mostly focused on consistency and unification: every channel had to communicate the same image (Accenture, 2013).
Now, in the 'total retail' period, organizations are urged to treat every consumer as a unique individual. PwC and Kantar Retail (2012) integrate customization in this projected development.

Customization, which enables customers to "*take ownership*" of the product design process and to use personalization tools for doing so (p. 32).

Offline stores will remain the number one location for consumers to purchase their desired goods, whereas online stores will continue their growth as well (KPMG, 2013). As mentioned before, the growth of these two important retailing channels isn't expected to raise conflicts. Instead, the estimated rise of mobile retailing will provide a more complete, trilateral retailer-consumer connection (Accenture, 2013). This connection is customer-centric: the aim is to get closer by becoming smaller. The latter is established by downsizing physical collections, creating ways to order goods digitally while being in the offline store and re-focusing on shopping to buy, instead of purely for fun. The experience that accompanies this goal-oriented way of shopping is focused on establishing and maintaining the unique relationship with individual consumers, by being present in every possible way.

As mentioned before, the essence of omnichannel fashion retailing is clear yet *unproved* empirically. This literature review has focused on determining past and (a trend-based forecast of) future fashion retailing, before studying the point that connects them: the present. The latter will be studied in the next chapter, after starting the debate on the critical analysis of the former.

2.5 CRITICAL ISSUES IN THE LITERATURE

The literature described and analysed above aimed at providing a concise yet comprehensive overview of studies regarding both past and future trends in the male fashion retailing industry. However, this analysis wouldn't be complete without a critical reflection. This reflection focuses on highlighting interesting contradictions between theories, as well as pointing out specific gaps in current-day literature.

First of all, this thesis commenced with an overview of past economies. According to Pine and Gilmore (1999) this evolution is currently arrived at the 'creative economy'. When analysing the characteristics of this contemporary economy, it seems to entail the replacement of old goods and practices by new products and inventions – i.e. creative destruction (Nakamura, 2000). However, when applying this theory on the fashion industry in specific, conflicting understandings are being revealed. Hence, according to Hemphill and Suk (2009) the fashion industry is known for its so-called "*ebb and flow of trends"* (p. 1151). The latter implies the revitalization of old trends in new innovations, a phenomenon that Lillethun (2011) describes as "*historicism*" (p. 119).

When reviewing the seemingly paradoxical discrepancy between the 'creative economy' in general and the specific male fashion industry – an industry that is located in this economy - the question of '*where does the truth lie?'* arises. The constant success of crafted garments in the male fashion history partly answers the question, however the *retailing* aspect remains omitted in this manner. Hence, studies regarding trends in fashion as a product – i.e. *what* do we buy – are abound; *where* we buy on the contrary remains rather vague. Would it then be possible that creative destruction is in fact present in the male fashion *retailing* industry? As Caves (2000) puts it: 'nobody knows'. Yet.

When critically analysing the scarcely existing studies regarding this industry, it becomes apparent that academic sources mainly investigated these channels role and functions as *independent, competing* retailing environments. Admittedly, this perspective isn't completely illogical since many – among which Petermans (2012) – extensively observed the arrival of the web stores and its accessory pressure on the added value of physical stores. The onset of a digital – as a 'counterpart' of the physical - world however can also be regarded from another point of view.

Both Magrath and McCormick (2012) and MacGillivray and Hahn (2003) emphasize the strength of *combining* all fashion retailing channels into one holistic business model. This integrated phenomenon is called 'omniretailing' and - despite the rather mature understanding of this approach' potential – is a completely understudied aspect of contemporary male fashion retailing. Instead, many consultancy firms (PwC & Kantar Retail, 2013; Accenture, 2013; KPMG, 2013) have incorporated the concept of omnichannel retailing in their 2020 retailing forecasts. In fact, all firms assign a leading role for this phenomenon in the coming years. Why is it, then, nowhere to be found in existing academic literature? Studying omnichannel aspects in current-day male fashion retailing might reveal the truth with regard to the – expected: interdependent - role of both off- and online stores. Furthermore, empirical investigation might present a level of nuance between the two opposite perspectives of 'creative destruction' (Schumpeter, 2003) versus the fashion-related 'ebb and flow of trends' (Hemphill & Suk, 2009).

Next to this, it might provide insight in another matter. As mentioned earlier on, Marchetti (2009) addressed the disappearance of the large fashion collections in stores as a movement towards the story as a gallery, in which the garment is approached as a piece of art rather than a commodity. However, when reviewing Scarpi et al. (2014) another statement is made. According to the scholars, current-day fashion shopping should be regarded as goal- instead of fun-oriented. From this point-of-view, designing stores as galleries or cultural venues wouldn't make sense. According to Accenture (2012) downsizing of physical collections sanctifies another means. The firm supports Scarpi et al.'s (2014) perspective on goal-oriented shopping; through the implementation of omnichannel features – such as the presence of tablets in stores – individual customers can be served in optimal form. Hence, physical collections function as show models from which consumers are enabled to order customized version via digital devices.

The idea behind omniretailing is to end the conflict between several dominant retailing channels and combine their strengths into one complete 'store' that can be reached via every preferred channel. It almost sounds to good to be true. Yet, trends from the past and future predictions based on these analyses seem to support the potential of this new form of retailing. However, after a long period of speculating and retrospectively analysing the industry, it is time for a decisive answer by means of empirical investigation. Only by doing so, an analysis on male fashion retailing anno *2014* can be presented. An analysis that presents the visions and insights of both the supply and demand side – a holistic image, which has never been presented before in this industry, so it seems.

The research in this master thesis therefore takes a first step into exploring where these theories and forecasts meet by studying an exemplary male fashion retailer. This fashion retailer has been praised and awarded many times for its progressive way of doing business in contemporary male fashion – combining innovative retailing channels with qualitative craftsmanship - and goes under the name Suitsupply. Suitsupply will be introduced in the next chapter.

3. INTRODUCTION TO THE CASE: SUITSUPPLY

"We cherish our craftsmanship. All men and women who work in our stores worldwide - and those on our corporate level - meet the requirements of this profession[6]"

Established in 2000, Suitsupply[7] – founded by Dutchman Fokke de Jong – claims to be unique, due to its unconventional yet successful way of doing business in male fashion retailing. From the very beginning, the organization has chosen to locate its stores in unusual places, such as at the parking lot of a busy highway. These locations all have in common that they are easily approachable for their main target audience: businessmen. In the Netherlands alone, Suitsupply has 315 employees and possesses a client base of 117,000 customers.

FOR IN-STORE PHOTOGRAPHS, PLEASE CONTACT THE RESEARCHER

Source: Photograph taken during the in-store interview in Den Haag

The products Suitsupply produces range from custom-made suits to confection garments and accessories that aim at being trendy and professional at the same time. The organization's extensive database of clients seems to explain the wide variety of clothing lines – standardized, made-to-measure-, and bespoke – which are available through the website, the mobile app and the traditional physical store. With rather provocative advertisements, the company has made

[6] Quote retrieved from http://eu.suitsupply.com/nl_NL/content-page-careers-talentdevelopment.html
[7] Information retrieved from http://eu.suitsupply.com and through informal conversation at the company's headquarters

an effort into making ‘wearing qualitative business suits’ a true fashion statement. Craftsmanship forms the foundation of this positioning.

FOR IN-STORE PHOTOGRAPHS, PLEASE CONTACT THE RESEARCHER

Source: Photograph taken during the in-store interview in Den Haag

Suitsupply’s efforts haven’t been without success: the organization has been awarded many times, among which by GQ Magazine as ‘*coolest new store’*, the New York Magazine as ‘*best place to go shopping*’ and was ranked ‘*number one for suits*’ by The Wall Street Journal. Next to their web shop, the company currently has 50 offline stores in the Netherlands, The United States, Canada, Belgium, Germany, the United Kingdom, Italy, China, Latvia, Lithuania, Belarus and Mexico, and is still expanding. Lastly, the incorporation of craftsmanship and tailoring in affordable collections and products seems to allow Suitsupply to exist in a niche – middle - segment of the male fashion retailing market.

While other fashion labels struggle severely from the financial crisis and leave the – predominantly offline – market; Suitsupply seems to achieve success after success, opening several new stores per year. The question is: *how do they do it? What’s their strategy for staying ahead of all competition? Can their success be explained by the use of omnichannel retailing strategies or should another aspect be addressed as being the foundation of their achievements?* When I approached the company’s headquarters, the organization’s reaction to this research was very enthusiastic. Suitsupply therefore invited me to become the first academic researcher that was granted access to key-informants, who shared their true recipe for the company's on-going – and future - achievements.

FOR IN-STORE PHOTOGRAPHS, PLEASE CONTACT THE RESEARCHER

Source: Photographs taken during the in-store interview in Utrecht

Other photographs, taken during the in-store interviews can be found in appendix IV.

4. METHODOLOGY

4.1 General approach

The study performed for this thesis was based on a *mixed methodology*. First of all, a general, expert vision of the status quo in fashion retailing was captured in the expert phase, followed by a qualitative, exemplary case study of the vision and strategy of Suitsupply employees – i.e. the supply side in the male fashion retailing industry. Afterwards, a quantitative survey was conducted among the demand side of the industry: customers of Suitsupply. These studies combined aimed for a conclusive perspective of the status quo of the male fashion retailing industry, in which the alignment between the input of both supply and demand was investigated.

The study was based on the following research question:
How can the omnichannel retailing strategy of the contemporary fashion store for men be defined?

In order to eventually answer this question in a complete and accurate manner; the question was divided into sub-questions. These sub-questions are the following:
Q1: How has the role of offline fashion stores for men changed over time, according to the literature?
Q2: What is the role of online and mobile fashion retailing in this development, according to the literature?

These first two sub-questions – Q1 and Q2 – could already be answered in the theoretical framework. However, in order to answer the remaining questions, - Q 3,4,5 and eventually the overarching research question – an empirical research was divided into two parts, studying both supply and demand side of the concerning industry through an expert phase and a case study.

Q3 - Supply side: What is the current strategy of the omnichannel male fashion store, according to Suitsupply? On behalf of this question, the company perspective of Suitsupply was captured through interviews with ten key-informants, investigating to what extent trends and observations in the literature are in fact present in reality and future plans.
Q4 - Demand side: What is the current role of the omnichannel fashion store, according to Suitsupply customers? In order to answer this sub-question, customers of Suitsupply were asked about '*how, where, when* and *why'* they buy their fashion items via specific retailing channels.
Q5: To what extent is the vision of supply and demand side aligned? Lastly, the success of Suitsupply's retailing strategy was studied by comparing the input of both supply and demand. Are the strategies working? Are there any issues to be addressed? Does the organization know

what their customers expect and demand? All in all, the alignment between the two units-of-analysis was determined by answering this question.

The operationalization and methodology of this study is described below.

4.2 Units of analysis

There are three units-of-analysis to be distinguished in this mixed methodological study. These research units are distributed over the qualitative expert phase and case study of the supply side and the quantitative case study of the demand side of this research.

Qualitative – expert phase

The units-of-analysis for this 'pre-research' were three established fashion-retailing experts and one employee of Suitsupply. These experts were asked for their vision on what is currently happening in the male fashion retailing industry, based on their professional experiences in the field.

Population

The population of the pre-research consists of Dutch fashion professionals. The exact number of this group wasn't part of the overall investigation of this study, due to the introductory and therefore concise character of this phase.

Sample

As mentioned above, the conversations in the expert-phase were held with four modern-day fashion professionals. These professional work on a freelance basis, at 'STUDIOby Judith ter Haar', a fashion-consulting agency in Arnhem or at the Suitsupply headquarters. The experts were approached after an on-campus presentation, on the advice of fashion academy ArtEZ and by e-mail. Their profession within the contemporary fashion field as well as their willingness to share their opinion regarding this thesis' subject is the common denominator of the four informants.

The sample consisted of the following experts:

Name	Function within the fashion field	Date of conversation/ interview
Aynouk Tan	Fashion consultant and journalist	13-01-2014
Amber Zeekaf	Consultant/forecaster at Studio by Judith ter Haar	27-02-2014
Martine Bovee	Consultant/forecaster at Studio by Judith ter Haar	27-02-2014
Niels van de Vorst	Visual merchandiser and photographer at Suitsupply	13-03-2014

Qualitative – case study

The units-of-analysis for the study of the supply side are key-informing employees of Suitsupply. As will be discussed below, they represent several departments within the retailer's headquarters and stores and in that way offer a well-funded explorative perspective of the organization's strategy and vision.

Population

The population of this research consist of 315 Suitsupply Netherlands employees. These - male and female - employees work at both the headquarters and in 24 stores across the country.

Sample

In this research, 10 participants were studied. The interviewed participants were selected in consultation with internal contact person Niels van de Vorst, who appointed the *key-informants* of several concerning departments in the organization. This *non-probability sampling* technique, described by Babbie (2011) and Yin (2009), focuses on locating respondents that well reflect the studied population and provide rich, in-depth information in qualitative research projects. After each interview, the participants were asked for further suggestions regarding the expansion of the sample through a *snowball technique* (Babbie, 2011). This way, the original list of Niels van de Vorst was verified on and extended for completeness and representativeness by his colleagues (Yin, 2009).

The sample consisted of the following Suitsupply employees:

Name	**Function-Department within the organization**	**Date of interview**
Niels van de Vorst	Visual Merchandiser & Photographer	25-04-2014
Janco Nagelhout	Manager Customer Care	12-05-2014
Eddy Beer	Head Quality (Netherlands and US)	12-05-2014
Sven van Bruggen	Master Offline Stores	12-05-2014
Rob Kamphuis	Manager Buying	13-05-2014
Aron Lewis	Manager Web store	13-05-2014
Merel Fleuren	Manager Customer Care	13-05-2014
Zoë Peels	Senior Offline Store Den Haag	16-05-2014
Remco van Brussel	Senior Offline Store Utrecht	16-05-2014
Roos Fleuren	Head Buying	22-05-2014

Quantitative

In the quantitative part of the study, the units-of-analysis were Dutch customers of Suitsupply. These customers have all bought one or more Suitsupply product(s) in either the on- or offline store and are therefore part of the company's client database. Further demographic and social characteristics of this varied units-of-analysis only revealed themselves after the performed research.

Population

The population from within the below-mentioned sample was drawn consists of 117,000 male Suitsupply customers. As mentioned earlier, these customers have all purchased one or more Suitsupply product(s), ranging from accessories to entirely tailored suits. Since the population possesses this variety in male consumers, the diversity of the sample could be guaranteed as well, while being restricted to the male gender.

Sample

This study aimed for a sample size of 383 participants. This calculation was based on a population of 117,000 consumers, a sample margin of 5 percent and a confidence interval of 95 percent. However, due to an internal decision of Suitsupply's CEO, it was no longer allowed to contact the customers from the database for research purposes. Therefore, the survey was sent to Suitsupply clients within the researcher's network – via snowball sampling – which reduced the factual sample size to 44 participants. Yet, after strict exclusion of 'non-Suitsupply-customers', the sample size was reduced to 30 respondents.

4.3 Data triangulation – alignment between supply and demand

When performing an exemplary single-case study, it is of significant importance to examine findings through multiple sources. This phenomenon is called '*data triangulation'* and enables a more valid investigation since it provides "*multiple measures of the same phenomenon*" (Yin, 2009, p. 115). According to Yin (2009) case studies that used multiple sources of evidence were rated higher in terms of overall quality.

In order to combine the input of this mixed-method case study into a holistic understanding of the contemporary male fashion omnichannel retailing industry, the outcomes of both the qualitative and the quantitative studies are compared and evaluated on alignment. In order to do so, specific questions were asked at both parties. In case an overall alignment in insights can be found in both side's visions, the role and functions of all retailing environment – offline, online and mobile - in the modern-day omnichannel retailer will be defined. If not, this thesis will make an effort in pinpointing crucial distinctions between supply and demand's visions, completed with an advice regarding improvement of this observed gap.

4.4 Qualitative research: supply

The supply side of this research was studied by means of an expert phase and an 'exemplary case study' (Yin, 2009) of Suitsupply. This qualitative form of investigation allowed an *in-depth* analysis of the status quo in contemporary male fashion retailing, through the lens of the employees of this exemplary retailer.

Expert-phase

Data collection

The experts, interviewed for the pre-research phase, took place at three different locations. First of all, Aynouk Tan shared her vision at the University, in an informal conversation after a presentation in the course of Cultural Economics Applications. Secondly, Amber Zeekaf and Martine Bovee invited me to the Studio in Arnhem, where the interview was performed and recorded above the company's store: Jones. Lastly, the explorative conversation with Niels van de Vorst took place at the Suitsupply headquarters, where the organization invited me to talk about Suitsupply's vision with respect this thesis' subject. The conversation with Niels was recorded on tape as well.

Operationalization

All three conversations had an *informal, unstructured* character. The aim of the pre-research was to *explore* different perspectives with regard to contemporary on-, offline and mobile retailing. Due to this goal, the discussed topics weren't written on paper a priori. Instead, the course of the conversations depended on the factual input of the experts *during* the interview.

Data analysis

The input, shared by the experts was minuted in both writing and on tape. The obtained data wasn't transcribed verbatim, but functioned as an important reference to the interview summaries- attached in appendix III - that were composed shortly after the meetings. Based on these summaries, a list of key concepts was established, which functioned as a expert-based starting point for the following case study.

Qualitative case study

Data collection

The case study was performed at the Suitsupply headquarters, as well as in two offline stores. In order to guarantee an open and safe research environment for the participating key-informants, each interviewee was asked to choose a location of their preference. The interviews lasted around 30 minutes and were recorded with permission. As requested by the employees, this information will be kept confidential.

The in-store interviews also entailed an *ethnographic* research element (Babbie, 2011), consisting of a detailed and accurate *observation* rather than an *explanation* of the store's experience and interior design. These observations, captured in photographs, functioned as visual support and verification of examples and motivations provided by the participants.

Operationalization

The 'supply side' of this research was studied through a single-case design, aiming for observing and analysing the revelatory case of Suitsupply through interviews (Yin, 2009). The in-depth, semi-structured interviews - suitable for this previously unstudied case - focused on exploring the combination of asking respondents about the "*facts*" of Suitsupply's development and vision, and their "*opinion*" about these events (Yin, 2009, p. 107). For doing so, several *"friendly, (...) non-threatening*" open topic-initiating questions were posed to the participants (Yin, 2009, p. 107). The flexible – i.e. 'let the subject talk'– design of these topic-initiating interviews allowed for guidance towards crucial concepts of the research, while offering the freedom to elaborate on specific, relevant input (Babbie, 2011). The concepts, used for the design of the questionnaire, are based on both the theoretical framework and input from the later on discussed expert phase of the research.

The topic-list commenced with a question regarding the work experience of the concerning employee and his or her function within the organization. This question enabled evaluation of the employee being a key informant from within the organization, and next to that offered background information for placing the interviewee's answers in perspective with respect to his or her level of influence, department, previous experiences and function-related forecasts.

The second question asked the employees to describe the 'signature' of Suitsupply – i.e. the characteristics that describes the organizations' work and distinguishes it from competing labels. This question refers to the notion of the store, being a communicating means between the label and the customer, described by Petermans (2012). Suitsupply's signature, defined by its employees will be compared both internally and externally. The latter is done by evaluating the customer's view on memorable features of their visit to the stores in the quantitative survey.

In order to explore the key-informants' perspective on the strategy and role of the contemporary Suitsupply stores, the following concepts were incorporated in the questionnaire: 'client', 'product', 'service' and 'experience' – i.e. who buys what, when, where and why? By using these broad concepts, the employees were enabled to share their vision without any restriction. The latter was necessary in order to maintain the explorative character of the study and to allow for interviews with employees from many different departments within the organization.

The above-mentioned concepts or functions of the stores were asked for both the online and the physical store and also required the indication of practical examples of *how* these concepts can be found in the store. For example, if the visual merchandiser would emphasize the notion of *mass-customization* in the physical store, another question would be posed to motivate this perspective by naming factual features – such as the presence of fabric swatches – which are present in this store.

After an in-depth description of Suitsupply's strategy regarding these retailing channels and specific store functions, the relation between on- and offline shopping was discussed. As mentioned by MacGillivray and Hahn (2003), Magrath and McCormick (2012), Accenture (2013) Wolters, (2013) and in the expert phase by Zeekaf and Bovee (2014) and van de Vorst (2014), the omnichannel store operates through the co-existence of the two – complemented with mobile retailing. The presence of omnichannel retailing at Suitsupply was therefore studied by means of discussing the channels' (in-)dependence on each other and their individual added value to organization's business model.

Depending on the employee's function and department, the interview was persecuted by going more in-depth towards their expertise. These expertises ranged from the use of curatorship (Marchetti, 2009; Pine, 1993; Fiore et al., 2004; de Raeve et al., 2012; in expert phase: Zeekaf & Bovee, 2014; van de Vorst, 2014) to the level of global and aspects in the physical stores (Brydges et al., 2013; Pookulangara & Shephard, 2013; PwC & Kantar Retail, 2012;in the expert phase: Tan, 2014; Zeekaf and Bovee, 2014; van de Vorst, 2014); to the position of the organization with respect to fashion labels (d'Aveni, 2010; Allwood et al., 2006; Hemphill & Suk, 2009) and different segments within the industry – low-end, middle, high-end (Aage & Belussi, 2008; d'Aveni, 2010; Lipovetsky, 1994; Blanco, 2011).

Lastly, the key-informants vision regarding Suitsupply's future was examined. Many omnichannel related articles entailed 'expectations' and 'prospects' of the coming six years (Magrath & McCormick, 2013; Petermans & Kent, 2013; PwC & Kantar Retail, 2012; Accenture, 2013; Wolters, 2013). In order to explore the likeliness of these forecasts to occur in the near future, the employees were asked to – from their perspective – indicate strategic plans for the pending years. The potential future use of mobile devices was particularly highlighted in the interviews. Also, the employees' main expectation of customers' needs and preferences were incorporated in this final part of the interview.

Figure 10: interview elements

Part one	Introduction – Professional work experience, function and expertise
Part two	Suitsupply's signature – Unique selling points
Part three	Role of web store – function within the organization's strategy *In terms of:* - Client - Service - Product - Experience
Part four	Role of offline store – function within the organization's strategy *In terms of:* - Client - Service - Product - Experience
Part five	Relationship on- and offline shopping: Complementing versus competitive
Part six	Complementing topics – based on field of expertise - Curatorship - 'Glocal' elements - Fast-fashion - Position in fashion segments
Part seven	Future vision – expectations based on current developments - Omnichannel retailing - Products/segments - Clients - Experience design

The exact topic list of the interviews, held with Suitsupply key-informants can be found in appendix II.

Data analysis

The collected data, derived from the recorded interviews, was fully transcribed in Dutch. In the transcripts of the interviews – attached by means of a complementary CD - both the expressions of the interviewer and the participant are included. Relevant quotes of the employees were translated into English, illustrating interesting findings in the concluding chapters of this thesis.

After transcription of the interviews, the gathered data was implemented in NVivo 10 (Babbie, 2011). Using such a computer-aided method for analyzing the interviews "*forces the involved researchers to make procedures more systematic and explicit*" (Petermans, 2012, p. 136). NVivo - specifically useful for mixed and qualitative research methods - uses a '*general inductive approach'* in which raw data is translated into categories and codes according to the "*Grounded Theory Method*" (Thomas, 2006, p. 239). The Grounded Theory Method (hereinafter referred to as GTM) is an inductive approach in which theories are generated from the inductive examination of data (Babbie, 2011).

The "*classifying and categorizing*" of data is done by means of 'open', 'axial' and 'selective' coding' (Babbie, 2011, p. 397). These types of coding are a starting point for theory to emerge through GTM (Thomas, 2006). Open coding entails "*the initial classification and labelling of concepts in qualitative data analysis*" (Babbie, 2011, p. 398). In axial coding, data is regrouped in order to identify the more important, 'core' concepts. The interview concepts, derived from analysing existing literature and the pre-research, hereby functioned as a coding checklist. Based on a combination of this checklist and the earlier mentioned forms of coding, selective coding was performed in order to indicate "*the central code of the study: the one that all the other codes related to"* (Babbie, 2011, p. 399).

A priori expectations

Based on the analysis of existing literature and preliminary conversations in the pre-research phase, the following expectations arose prior to the study:

First of all, both the off- and online stores are expected to be of added value to the contemporary male retailer. Especially with respect to prospects regarding omnichannel retailing, their relationship seems to entail a high level of interdependence and co-existence. As a third retailing channel, mobile devices such as smartphones and tablets are expected to be of significant importance as well.

Secondly, contemporary shopping is expected to be goal- instead of fun-oriented. Fun in the form of experience design seems to be present, yet not defined as being the ultimate goal of the current-day retailer.

Historically, male fashion retailing has shown to flourish through the supply of craftsmanship and quality. This characteristic is predicted to be visible in the modern-day industry as well. Moreover, the development of traditional tailored menswear seems to be evolving towards mass customization: an affordable alternative that enables the large public to individualize their garments as well.

Yet, if and how these expectations and predictions are present in contemporary male fashion retailing will become clear in the concluding chapters of this thesis.

Trustworthiness

In addition to the benefits of the above-described research method, conducting qualitative research in the form of a case study also presented a number of challenges and weaknesses. First of all, while – in comparison with quantitative methods – the validity of qualitative studies is strong through the in-depth and flexible character of this method of research; their reliability is often questioned (Babbie, 2011). Hence the subjective element at both the researcher and participant's side makes it challenging to derive objective theory from their input. Yet, while being aware of this weakness and accepting the fact that generalization of the outcomes is impossible, the reliability of the method was improved in the following ways: through the operationalizing the concepts from existing literature, the 'subjective' element of the interviews was reduced by implementing academically accepted definitions. Secondly, all interviews were recorded and transcribed verbatim, in order to overcome the risk of incorrectly capturing the participant's input on paper. Next to this, every choice and activity made in this research is extensively explained and motivated in this thesis and its research protocols, enabling fellow-students and scholars to verify or continue the study if desired. Lastly, NVivo reduces the risk of unreliable outcomes by structurally coding and categorizing the recorded input in an objective and unbiased manner.

Challenges

Next to challenges with regard to the reliability – in contrast to validity – of this study, another notion has been challenging the execution of the research as well. Hence, Suitsupply's invitation to their employees to participate in the interviews might result into a tendency to answer the posed questions in a socially desirable way. In order to overcome this risk, the questionnaire solely entailed open questions, keeping its tone-of-voice as neutral as possible. Furthermore, the varied composition of the sample – with regard to department, function and background – enabled holistic verification (accumulated input from key informants representing the company as a whole) of individual input (supplied by a specific informant).

4.5 Quantitative research: demand

Next to the supply side, the demand side of the male fashion retailing industry was studied in the form of male customers of Suitsupply. These customers were all present in the current client database. This second research has a *descriptive* and *deductive* character in which quantitative research is most suitable (Babbie, 2011), and offering a holistic view of the case after the first explorative study of the supply side. On Suitsupply's request, the survey was kept short and concise, in accordance with the company's emphasis on customers' convenience. As a result, it took the average participant around 3:20 minutes to complete the entire questionnaire.

As mentioned earlier, internal decisions did not allow for large-scale study of the population. Therefore, the quantitative research only provides an *explorative* image of demand side's opinion and preferences. Presenting a 'holistic' perspective of the status quo of this case study is consequently *partially* accomplished.

Data collection

The below-mentioned hypotheses were tested through an online conducted survey. The survey consisted of a combination of close- and open-ended questions and was sent to Suitsupply customers within the researcher's network via LinkedIn, Facebook and Twitter [8]. Furthermore, the questionnaire was online for 14 days. After the deadline, the data was inserted into and studied through SPSS.

Operationalization

The 'demand side' of this research was studied through an online survey, aiming for using *multiple sources* of case-study evidence (Yin, 2009). Therefore, next to the interviews, a variety of concepts were studied among Dutch Suitsupply customers. These concepts were tested by means of both *questions and statements*, in order to accurately determine the 'attitude' of the individual respondents with respect to retailing environments and Suitsupply (Yin, 2009).

The survey contained a combination of close- and open-ended questions. The former allowed for uniformity and structure (Babbie, 2011), offered by the previous literature review and suggestions in the expert phase and the qualitative interviews. The latter – open-ended questions – mainly functioned as a means for respondents to specify or motivate their answer to the close-ended questions. Next to this, the open-ended questions allowed for the participating customers to respond to questioned concepts of which content and preferences were previously unstudied i.e. unknown.

The close-ended questions were either used as a check regarding the respondent's demographics and experience with the different retailing channels, or as a means to determine the respondent's attitude towards the following concepts through a five-point Likert scale. First of all, the participants' opinion regarding the functions of online stores was tested upon five concepts, which were derived from multiple sources in the theoretical framework, due to an absence of one comprehensive model. These five combined concepts entail *'design'* (Jones Lang LaSalle, 2010)*, 'wide variety of goods'* (Petermans, 2012)*, 'convenience in terms of delivery'*

[8] After the decision of Suitsupply's CEO Fokke de Jong to no longer allow researchers to 'bother' clients by officially sending surveys.

(Scarpi et al, 2014)*, 'the offering of risk-reducing information*' (Suitsupply; request in qualitative interview, 2014) and '*customer service'* (PwC & Kantar Retail, 2012). Since none of these studies and expectations tested the concepts empirically in a quantitative survey, operationalization of these concepts demanded a lowest deviation of the literal concepts as possible. This was executed by one-to-one implementation of the defined concepts into the questionnaire. While doing so, a distinction was made between the importance of these aspects in general online shopping; and specifically, the participants' opinion of the presence of these aspects in Suitsupply's web store.

Secondly, the participants' opinion regarding the contemporary functions of offline stores was tested through five variables as well. Just as the functions of online shopping, modern-day functions of offline stores were determined through a combination of multiple sources. These functions are related to '*the multisensory aspect of shopping'* (Petermans, 2012; Carù & Cova, 2003), '*the presence of an in-house tailor'* (Suitsupply; request in qualitative interview, 2014), '*the possibility of mass-customization'* (Pine, 1993; Fiore et al., 2004; de Raeve et al., 2012; Suitsupply; in qualitative interview, 2014), '*Personal advice of staff*' (Suitsupply; request in qualitative interview, 2014;) and '*the overall shop experience'* (Pine & Gilmore, 1999; Petermans, 2012). Again, none of these studies and forecasts – transparently - tested the concepts in an empirical, *quantitative* manner. Hence, the study that entailed a quantitative survey (Fiore et al., 2004) did not present an operationalization of the variables. Therefore, the concepts were one-to-one translated into variables, without deviating from their literal description. Also, the distinction was made between importance during general shopping activities and specific presence at the Suitsupply store.

For the perceived functions of both off- and online fashion retailing an open-ended answering category was created, in order to enable the participant to add important aspects of current-day stores to the questionnaire. Also the participants' motivation was asked after indicating the level of presence of all aspects in Suitsupply specific environments. The latter allows for more in-depth understanding of the respondent's attitude (Babbie, 2011).

Based on the qualitative interviews with ten Suitsupply employees, a number of variables were added to the questionnaire. Apart from the above-mentioned *expected* functions of the stores stressed by the key-informants, the remainder variables contained the 'difference of purchased items on- and offline' – *"do customers with different purchased items (ranging from accessories to completely tailored suits) value the functions of our stores in a different manner?*" -, the participant's 'opinion regarding the variety in collection both on- and offline '– "*are the collections large enough or do customers observe an imbalance between on- and offline collections?*" – the participant's 'willingness to visit the other retailing channels based on visiting the store' - e.g. "*does the customer visit the physical store after a visit to the web store?".*

Lastly, three other questions were posed to the respondent. First of all, Petermans (2012) asked participants to capture memorable aspects of the store in photographs. In order to incorporate this element of her study into the quantitative questionnaire, the participants were asked to define their most memorable aspect of the store in words. By doing so, a qualitative image of the customer experience was obtained. Secondly, the participants were asked to determine the retailing channel(s) of their preference. As the forecasts in the theoretical framework indicated, omnichannel retailing strategies entail the importance of *all channels combined* (Magrath & McCormick, 2012; McGillivray & Hahn, 2003; Wolters, 2013; PwC & Kantar Retail, 2013; Accenture, 2013; KPMG, 2013). If this is true in reality and to what extent demand side's preferences matches the supply side's vision will become apparent through this question. Lastly, the customer's attitude towards *fun*- versus *goal-oriented* shopping (Scarpi et al., 2014; Jones Lang LaSalle, 2010) was tested by providing three statements regarding the aim of their store visit: purchase (*goal*); orientation (on request of Suitsupply); or joyful experience (*fun*). Each statement could be answered by indicating how often customers visited the stores with that specific aim.

To conclude, tips and comments were asked in order to improve the current customer experience of the Suitsupply retailing channels.

Data analysis

After conducting the quantitative survey, the obtained data was implemented in SPSS. Yet, before defining which tests would be suitable for studying what should be studied, the level of measurement of the concepts was defined. The majority of the questions entailed five-point Likert-scale answering possibilities. As van Dalen (2009) states, this Likert-scale initially makes the variables 'ordinal', with a possibility of treating them as being 'interval'. In order to accomplish the latter, the concerning scale should be divided into numbers ranging from one to five, which can then be approached as a continuum. Requirements for this activity are: distances between each number i.e. category should be equal and the continuum should be "*normally distributed*" (van Dalen, 2009, p. 45). Since all variables in this quantitative study met these 'interval' requirements, a variety of test could be performed.

Due to the feasibility of this mixed-method study, the quantitative part of this thesis purely focused on presenting descriptive statistics. Biases such as the level of multi-collinearity were tested via SPSS, in order to guarantee the quality of the outcomes.

Validity and Reliability

As a contrast to the qualitative study in this research; the quantitative part possesses a weakness with respect to validity. According to Babbie (2011) the artificiality of close-ended questions regarding people's attitude causes this constraint. According to the scholar, participant's answers should therefore be considered as being "*approximate indicators*" of the underlying variables (2011, p. 277). The absence of a holistic, already-existing survey induced the research' weakness in validity. Yet, by incorporating both theoretical concepts and empirically obtained topics through the quantitative study, data triangulation controlled this limitation to an acceptable level (Yin, 2009). Also, the sixteen (partly) open-ended questions enhanced validity by offering answer categories in which participants are enabled to specify their motivations and attitude.

Reliability, on the contrary, is relatively high in the performed quantitative study. Especially unreliability of the researcher's observations is controlled by the standardized questions and answer categories. By deviating from theoretical definitions as little as possible, the subject's own reliability is also reduced (Babbie, 2011). Additionally, by extensive motivation of all performed operations in this research, the possibility of repeating the study and verifying its results, is offered (Yin, 2009).

Hypotheses

Based on the performed literature review and qualitative studies in the expert phase and the case study on the supply side, the following hypothesis arose. All hypotheses were tested by means of the quantitative survey and will be either rejected or retained in the concluding chapters of this thesis.

Figure 11: Hypotheses

Hypotheses

H1	Customers mostly buy ready-to-wear clothing online, while mainly purchasing customized garments in the physical Suitsupply store.
H2	The most memorable experience customers indicated from the web store is the 'customer service'.
H3	The most memorable experience customers indicated from the physical store is the 'personal advice of the staff'.
H4	The visit to the web store invited the customer to also visit the physical store.
H5	The visit to the physical store invited the customer to also visit the web store.
H6	Customers often orientate online; subsequently, they purchase the items in the physical store.

H7	The customers' visit to both the physical and online store was *goal-oriented*.
H8	Customers indicate an imbalance between the on- and offline collections
H9	Customers prefer a combination of offline, online and mobile retailing – i.e. an omnichannel retailing approach.

Challenges

The above-presented quantitative study also had a number of challenges that were taken into account. First of all, as mentioned in the literature review, the limited presence of existing literature with regard to the contemporary function of stores – both on- and online – in the male fashion industry proved the relevance of this performed research. Yet, operationalization of the concepts was difficult, due to the absence of a holistic framework to derive from. Nonetheless, through an extensive yet critical combination of adjacent fields of study a first step has been made to bridge this observed gap.

Secondly, the open-ended questions reduce the conformity in the survey results. However, given the fact that a scientifically operationalized questionnaire was non-existent, every question had to be tailor-made. In order to guarantee exhaustive answer categories, sixteen questions (partly) contained open-ended answer possibilities. The potential researcher's bias in this matter was overcome by coding the qualitative input of participants.

Lastly, the survey was sent to customers within the researcher's network. Despite the benefit of limiting the interference of the retailer and therefore preventing socially desired answers by clients, a smaller sample size was reached than envisioned. Subsequently, the representativeness of the quantitative analysis with respect to the overall population is questionable. However, due to this matter, the aim of the quantitative analysis has shifted towards an explorative insight, valuable as a stepping-stone for future research, rather than being a comprehensive study of its own. Also, the snowball sampling allowed for the spreading of the survey among customers outside the researcher's network, resulting in a more balanced sample in terms of participant-diversity (Babbie, 2011).

5. RESULTS

5.1 Outcomes expert phase

Before initiating the introduced case study, a number of interviews were held as a part of the pre-research. In this preliminary study, key-informants of the fashion industry shared their vision of the fashion retailing status quo. The input - given by four professionals in the fashion industry - will concisely be described below.

First of all, what became apparent during the interviews with the experts is that they all observe and articulate the 'renaissance' of old fashion traditions and practices, combined with new trends. Aynouk Tan perceives this phenomenon through the re-entry of customers' shop visits by appointment. According to Tan, these private visits express the *recurrent* processes within the fashion industry – i.e. integrating established skills in modern-day retailing strategies.

Studio by Judith ter Haar and Niels van de Vorst recognize the recurrent of certain 'extinct' fashion practices in the revitalization of '*craftsmanship'*. Although craftsmanship has proven to be a key factor throughout male fashion history; the large scale of which this 'trend' seems to have returned in the overall, modern-day Dutch streetscape is extraordinary. As the experts state, the difference in contemporary craftsmanship seems to be the close relationship between on- and offline retailing. Paradoxically as this statement might seem in relation with current debates regarding the disappearance of local stores through the rise of web stores and dominant fast fashion labels, the experts explain their observation as follows. Online stores should no longer be seen as cannibalizing physical shops; on the contrary, successful, trendsetting retailers function by means of *co-existing, complementary* retailing channels. Through the combination of these individual channels into an *interdependent* manner, their strengths are bundled into one business model. Craftsmanship herein functions as a unique selling point of the contemporary offline shopping environment, offering services that can't be offered online (yet).

Next to the significant role of craftsmanship, all experts underpin the importance of retailer-customer *relationships* in the current fashion retailing industry. These relationships are established and maintained through: re-introducing private appointments (Tan); reinforcing local initiatives with surrounding communities or through incorporating local, cultural features in store interiors (Studio by Judith ter Haar; Suitsupply); and by offering excellent customer service and the possibility of personally customizing unique crafted garments (Suitsupply).

All in all, a number of key concepts were derived from the expert phase. The following concepts were mentioned in most interviews and were therefore used in the qualitative interviews: *recurrent process – craftsmanship – curatorship/co-creation – online: informative/offline: personalized – culture-reflecting experience design.*

An extensive version of the outcomes of the expert phase can be found in appendix III.

5.2 Findings

After the expert-phase of this research, the following results could be drawn from both the qualitative and quantitative studies.

5.2.1 Qualitative

CONFIDENTIAL INPUT – FOR MORE INFORMATION REGARDING THE RESULTS OF THE QUALITATIVE INTERVIEWS, PLEASE CONTACT THE RESEARCHER

5.2.2 Quantitative

The following findings could be derived from the quantitative surveys, held among 34 Suitsupply customers. Due to this small sample size, it was not possible to test potentially significant relationships and effects between the variables. Instead the results of this study only present descriptives that form an explorative starting point for future research. These descriptive outcomes of the survey are based on the questionnaire, attached in appendix II.

Composition of the sample

The composition of the respondents exists as follows: 97 percent of the sample consists of male customers. The other 3 percent – representing one client – is female. The female customer was not excluded from the sample, simple due to the fact that this respondent ever purchased an item at Suitsupply and therefore possesses valuable input for this research. Furthermore, only one respondent finished high school as highest level of education, followed by two participants who finished secondary vocational education. The remainder 27 participants finished university (of applied sciences).

The sample varies significantly in terms of 'function'. There are six consultants in the sample, nine students, and the remainder functions range from 'Commercial management trainee', to 'System administrator' and from 'CEO' to 'Programme manager'. Furthermore, all participants have the Dutch nationality.

Purchases at Suitsupply

The respondents expressed the following frequency of purchasing items via the web and physical store of Suitsupply. 80 percent of the 20 participants that answered this question, declared to 'never' buy clothes via the Suitsupply web store. Of the remainder 10 participants, only one expressed to 'often' purchase Suitsupply garments online. The sample seems to be more active in the physical store of Suitsupply. In fact, 54 percent of the respondents indicates to purchase Suitsupply products in the physical store 'often' or even 'very often'. No participants expressed to ‘never’ buy in the offline store. On a range from 1 to 5, the average frequency of purchases via the on- and offline store can be observed in the following figure:

Figure 12: The average purchase frequency in the web and physical Suitsupply store

Statistics

		Where did you ever purchase something at Suitsupply? In the web store	Where did you ever purchase something at Suitsupply? In the physical store
N	Valid	20	28
	Missing	10	2
Mean		1,40	3,50

According to this result, the participants of this research predominantly buy their items offline. However, the following question is: what did they buy either online or in the physical store? Unfortunately, only four participants every purchased an item in the Suitsupply web store. Therefore, it wasn’t possible to present relevant outcomes regarding their purchases in the form of bar charts or tables. Hence, only two of them bought ready-to-wear items (very) often; 2 of the online customers purchased accessories.

However, 25 out of 30 participants every purchased an item in the physical Suitsupply store. This resulted in the following outcomes:

Figure 13: Purchased items in the offline Suitsupply store

		Custom-made items	Ready-to-wear items	Accessories
N	Valid	26	26	27
	Missing	4	4	3
Mean		2,73	3,08	2,96

The most common purchased items seems to be ‘ready-to-wear’, followed by ‘accessories’. ‘Custom-made’ items score relatively low, since the highest percentage – namely 39 percent - of the participants indicates to ‘never’ buy this type of products at Suitsupply. Still, around 42 percent states to buy custom-made items (very) often at Suitsupply. 50 percent of the participants (very) often purchase ‘ready-to-wear’ items at the retailer, followed by ‘accessories’ with 44 percent. From this perspective, the purchased items in Suitsupply’s physical store appear to be rather mixed, just as the (few) indicated purchases in the retailer’s web store.

Online shopping behavior

The respondents indicated the following motivations for visiting a web store in general:

Figure 14: Web store visit motivations

		I regularly buy clothes online	I visit a webstore with the aim: Purchasing an item	I visit a webstore with the aim: Orientation on items	I visit a webstore with the aim: Experiencing a pleasurable store-experience
N	Valid	11	9	10	9
	Missing	19	21	20	21
Mean		2,64	2,78	4,20	2,56

As shown by this data, the frequency of shopping online is relatively low with only 2,64 on the scale from 1 to 5. In case they *do* visit the webstore, the main motivation for customers turns out to be for product-orientation. ‘Experiencing a pleasurable store-experience’ seems to be the least important incentive for a web store visit.

When asked about the most important factors for purchasing items *in general* online, the participants indicate the following:

Figure 15: Web store purchase motivations

		A good presentation of the products	The wide range of products offered	The convenience regarding delivery	Present product-information	Customer service (exchanges, returns)
N	Valid	11	11	11	11	11
	Missing	19	19	19	19	19
Mean		4,55	4,09	4,45	4,55	4,45

All proposed factors score high on importance with respect to online purchases. No one disagreed (strongly) with the statements that these factors are important when buying items online. Moreover, an average score above 4 indicates that the majority of the respondents strongly agreed with these statements. The following question was: to what extent were these factors present in the Suitsupply web store? The participants answered the following:

Figure 16: Presence factors in Suitsupply web store

		A good presentation of the products	The wide range of products offered	The convenience regarding delivery	Present product information	The customer service (exchanges, returns)
N	Valid	9	9	9	9	9
	Missing	21	21	21	21	21
Mean		3,67	3,56	3,44	3,22	3,44

All factors score relatively high with respect to the range from 1 to 5. The highest *average* score was appointed to the 'presentation of the products', while the highest maximum score of '5' – i.e. 'strongly present' - was appointed to the organization's 'Customer Service'. The highest score of '4' – i.e. relatively present – was addressed to the wide range of products offered.

To the question: '*what about the Suitsupply web store was the most memorable to you?'* the participants answered:

"A good experience with the customer service in different areas"

"The corporate character"

The possible colors and combinations"

"Clarity, consistency"

"Messy"

Lastly, three statements were presented regarding the participants' vision and function of the Suitsupply web store:

Figure 17: Statements regarding vision and role Suitsupply web store

		My visit to the web store invited me to also visit the physical store	To me, the webstore is a place to orientate on products; I prefer to buy the products in the physical store	The assortment of the Suitsupply web store is large enough
N	Valid	10	10	9
	Missing	20	20	21
Mean		3,70	3,90	4,22

Especially the statement about the size of Suitsupply's online assortment scored high in terms of agreement. 4 out of 9 respondents who answered this question, indicated to 'strongly agree' with this statement.

Offline shopping behavior

The respondents indicated the following motivations for visiting a physical store in general:

Figure 18: Offline store visit motivations

		I regularly purchase clothes offline - in a physical store	I visit a physical store with the aim: Purchasing a product	I visit a physical store with the aim: Orientation on the products	I visit a physical store with the aim: Experiencing an overall pleasurable store-experience
N	Valid	27	25	25	25
	Missing	3	5	5	5
Mean		4,04	3,92	3,64	3,20

Of all respondents, 78 percent indicates to (strongly) agree with the statement to 'regulary purchase clothes in a physical store'. 68 percent indicates that the aim of their store visit (very) often is 'purchasing a products'. 72 percent also states to 'orientate on products' (very) often in the physicals store, followed by 48 percent of the respondents who declares to (very) often visit in order to 'experience an overall pleasurable store-experience'.

Four respondents motivated their answers by stating:

"Being a man, shopping for clothes in general is never a pleasurable store-experience. If there would be an online shop that meets my desires (in terms of clothing style) and that would always have my size, I would only buy online".

"To me, it is about feeling what I'm buying. So, that I can also try it on and, if necessary, ask for another size, et cetera".

"I only enter a store when I've decided to purchase something. The web store is mainly for orientation. The store-experience should be good, but it is not something that I'm specifically looking for".

"I find experience important when I purchase something: to feel how the garments fit, to see how it looks as a whole".

When asked about the most important factors for purchasing items *in a general* physical store, the participants indicate the following:

Figure 19: Important factors for purchasing items offline

		The possibility to touch and try on the items	The presence of a tailor	Personal advice from the store personnel	The entire store-experience
N	Valid	27	27	27	27
	Missing	3	3	3	3
Mean		4,56	3,70	3,74	3,70

As can be derived from this data, especially the 'possibility to touch and try on the items' scores significantly high. 96 percent of the respondents indicated this factor to be (very) important. 70 percent of the participants (strongly) agreed with the importance of 'personal advice from the store personnel'. The 'entire store-experience' scored the lowest, with 'only' 59 percent of the participants, indicating to (strongly) agree with it is important with respect to offline purchases.

Furthermore, the participants expressed the following presence of these factors in Suitsupply's physical store:

Figure 20: Presence of these factors in Suitsupply's physical store

		The possibility to touch and try on the items	The possibility to curate/customize my items	The presence of a tailor	Personal advice from the store personnel	The entire store-experience
N	Valid	27	27	27	27	27
	Missing	3	3	3	3	3
Mean		4,22	3,89	4,48	4,26	3,93

Again, the outcomes present high results. 89 percent of the respondents valued the 'presence of a tailor' as well as the 'personal advice from the store personnel' as relatively to strongly present in the Suitsupply physical store. 'The possibility to touch and try on the items' – the factor with the highest score in general importance, scored lower, with 'only' 81 percent of the participants indicating relative to strong presence at Suitsupply's offline store. The latter can be explained by the answer of 5 respondents, who expressed that it was 'neutrally' to rarely present. One participant motivated his answer as follows:

"Through the limited assortment in the store, I wasn't able to see and feel the things I saw in the web store in reality".

To the question what the sample *remembered* the most from their visit to the physical store of Suitsupply, 20 participants gave their opinion. These memories ranged from rather negative attitudes:

"Limited assortment"

Not enough staff"

To positive remarks such as:

"The salesman still recognized me after a few months"

"Very tidy! Cool store, cool atmosphere. Very much choice"

Nice, extensive tie rack"

"The service. They REALLY take the time for you en don't try to rip you off"

"The tailor adjusts your suit on the spot"

All in all, 14 respondents indicated the 'service' of the personnel and the tailor to be the most memorable. Several customers specifically mentioned the staff's ability to 'recognize' them after a few months. Next to that, 8 respondents remembered the 'design of the store'. Especially the way the 'ties' were presented was mentioned regularly. The participants' opinion with respect to the store's collection were mixed. While one respondent indicated the assortment to be limited; four others mentioned the collection to be (too) extensive.

Lastly, three statements were presented regarding the participants' vision and function of Suitsupply's offline store:

Figure 21: Statements regarding vision and role Suitsupply's physical store

		My visit to the physical Suitsupply store invited my to also visit the web store	To me, I orientate on products in the physical store, but I prefer to purchase these items via the web store	To me, the assortment of the physical Suitsupply store is large enough
N	Valid	26	26	25
	Missing	4	4	5
Mean		2,65	1,65	3,28

As can be derived from this input, 92 percent of the participants (strongly) disagrees with the statement to rather purchase items online after orientating online. Also the extent to which the offline store invited to visit the offline store is relatively small. In fact, 50 percent of the respondents (strongly) disagreed with this statement, complemented with 23 percent who indicated to have a 'neutral' opinion. Lastly, only 20 percent of the respondents indicates to (strongly) disagree that the offline assortment of Suitsupply is large enough. One participant motivated his answer:

"The 'tailor-made' (blue line) assortment may be larger regarding types/models"

Attitude with regard to omnichannel retailing

27 out of 30 respondents answered the following question: *do you have a preference for one of the Suitsupply channels?* Their answers are displayed in the following figure.

Figure 22: Preference Suitsupply retailing channels

Do you have a preference for one of the Suitsupply retailing channels?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No, I prefer to shop both online and in the physical store	2	6,7	7,4	7,4
	No, I prefer to shop both on- and offline, and I regard shopping via mobile phone or tablet as a welcome addition	2	6,7	7,4	14,8
	Yes, I prefer to buy my clothes online	1	3,3	3,7	18,5
	Yes, I prefer to buy my clothes in a physical store	22	73,3	81,5	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

As can be observed in the figure, 82 percent of the respondents that answered this question, indicated to prefer the physical store when buying clothes. Almost 15 percent does not prefer one specific channel, of which 7 percent expresses to welcome mobile devices as a third retailing channel. Only 4 percent the participants who answered this question indicated to prefer to purchases clothes online. This number refers to one participant out of 27.

Future shopping desires

Lastly, the respondents were asked to specify features that they currently miss in the Suitsupply store, which they would like to see in the future. 8 participants shared future wishes; a grasp of this input is presented below:

“An espresso or a whisky during shopping ;)”

“More character in the form of store design. A number of foreign Suitsupply stores already extended this further”

“Some items are really hard to find in the offline store, which are already available in the web store. […] there seems to be a gap between offline and online store”

“Female personnel. They can indicate what items are sexy”

A complete overview of the SPSS- data can be found in appendix V.

6. CONCLUSION & RECOMMENDATIONS

The following chapter presents conclusions, derived from the performed mixed-method case study. By doing so, the research question as well as the sub-question will be answered, allowing for discussion and recommendations for future research.

6.1 Conclusion & discussion

This thesis aimed for presenting a holistic image of the previously understudied male fashion retailing industry. Despite a limited number of respondents in the quantitative part of this research, a combination of a critical literature analysis and a mixed-methodological, empirical case study, still allowed for answering the following research question:

How can the omnichannel retailing strategy of the contemporary fashion store for men be defined?

Yet, before answering this overarching question in a complete and accurate manner, each sub-question will be discussed and answered.

Q1: How has the role of offline fashion stores for men changed over time, according to the literature?

As can be concluded from the theoretical framework, male fashion has always been focused on craftsmanship. From the 1860 onwards, tailoring – heavily controlled from Savile Row in London - defined this industry to a large extent. Up until today, this segment has retained its status, despite the rise of confection and haute couture lines from the 1960s onward. This continuity in status should not be confused with 'standstill'. On the contrary, the offline fashion store has certainly changed over time. With the advent of male confection lines, stores emphasized standardization as well. Stepping away from the one-to-one service in tailor shops, confection garments were offered in self-service stores. Yet, this evolution towards a more convenient way of purchasing fashion goods - without the custom-made, yet time-consuming, help of skilled salesmen - almost seem to have resulted in the disappearance of these stores 50 years later.

Hence, debating the added value of offline stores hasn't been common practice throughout (male) fashion history. Until the arrival of the Internet, choices regarding *where* to buy a fashion item were limited. In that perspective, the millennium reflects a clear image of rising competition among retailing channels. From that point onwards, brick-and-mortar shops have been repositioning themselves by offering certain aspects that couldn't be digitalized. Aspects that show large similarities with historical store features while creating them with new, innovative practices.

One of these aspects is tailoring. Through the rise of mass-customization, this form of craftsmanship became available for a greater public. 'Sartorialism' as a counterpart of upcoming fast fashion labels, significantly strengthened the position of offline stores by demanding the physical advice and measuring by a tailor. Another aspect, restricted to offline retailing, is the design of multi-sensory experiences. By incorporating both 'utilitarian' and 'hedonic' shopping elements, the primary product-of-exchange became individualized, memorable and above all: impossible to comprehensively establish online.

Q2: What is the role of online and mobile fashion retailing in this development, according to the literature?

What was so imminent about the online and mobile retailing channels that physical stores seemed to disappear? It is the 'convenience' element, combined with 'unlimited supply' the Internet has to offer. Hence, where consumers previously had to physically leave their homes in order to buy a certain good; web stores and applications now bring the stores – accompanied with extensive collections - to the customers via largely available (wireless) Internet connections. With a few clicks, clients have orientated, assessed, compared and eventually purchased an item that – in most cases – will be brought to them for free. Did this mean the end of current-day physical stores? The answers, derived from the Suitsupply case study is 'no, certainly not'.

Q3 - Supply side: What is the current role of the omnichannel male fashion store, according to Suitsupply key-informants?

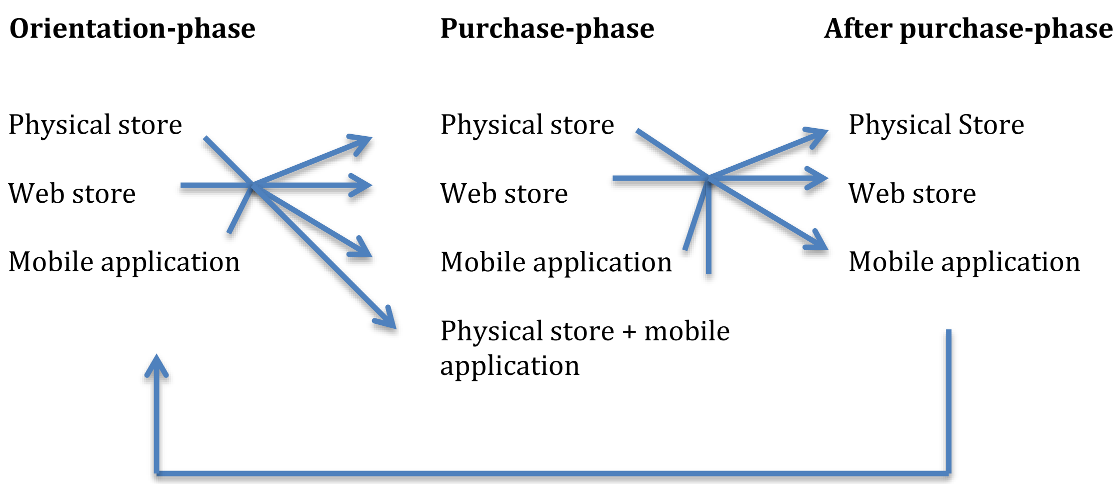
At the beginning of the qualitative case study at Suitsupply, the following expectations were defined a priori:

- Both the online and offline stores are still of added value. In fact, they co-exist in an omnichannel business model, requiring a high level of interdependence;
- A third retailing channel in the current-day omnichannel approach is the use of mobile devices;
- Together, these retailing channels aim for goal-, instead of fun-oriented shopping. Fun is present in terms of experience design, but not the main goal the contemporary male fashion retailer; and
- Craftsmanship and quality is still of high importance for the modern-day male fashion store. Moreover, the development of traditional tailored menswear seems to be evolving towards mass customization.

After in-depth study of Suitsupply's current and future omnichannel retailing strategies, the a priori expectations were *confirmed* in reality. The key-informants emphasize the, co-existing role of offline, online and mobile retailing. The latter is still in an upcoming phase, yet functioning as an extension of the web store, rather than a retailing channel of its own. However, the balance between these three channels is changing, shifting towards equal importance. When this equality is reached, the organization's omnichannel strategy with mutually reinforcing retailing channels will be completed.

CONFIDENTIAL INPUT – FOR MORE INFORMATION REGARDING THE CONCLUSIONS OF THIS RESEARCH, PLEASE CONTACT THE RESEARCHER

Figure 23: Own elaboration on flow in customer experience: the omnichannel 'purchase-cycle'



Q4 - Demand side: What is the current role of the omnichannel fashion store, according to Suitsupply customers?

Studying the vision of Suitsupply key-informants was only one part of the research. The other part entailed the vision of the organization's demand side: customers. By examining the attitude of this demand side, a more holistic image of the contemporary, omnichannel fashion store for men could be provided. However, it should be taken into account that the small sample size did in no way allow for conclusions regarding the significance and generalizability of the outcomes. Instead, it did function as a small-scale exploration of the demand side of this case. The conclusions in this thesis therefore only apply to the customers in the *sample*, rather than the entire population.

As can be concluded from the survey, Suitsupply customers appear to be benevolent with respect to an omnichannel retailing approach. From their attitude, it becomes clear that purchase-oriented shopping still remains focused on Suitsupply's physical store; however, preferences for the orientation-phase are mixed. In fact, a visit to the web store invited customers to also visit the physical store. Differences in *what* they purchased via these channels remained vague, due to insufficient input.

From the memorable experiences the customers derived from their visit to both the on- and offline store, it becomes apparent that they play different roles in a consumer's purchasing process. While memories from the web store mainly entailed '*visual*,' design-related features; memories from the physical store predominantly involved the '*service*' from the staff and tailors.

For customers, the order in which the various retailing channels are visited is rather clear. The online store often functions as an orientation point after which an item is actually purchased via its physical counterpart. The other way around turns out to be uncommon. The role of mobile devices couldn't be observed in the survey, current purchases were still restricted to the other two channels. Only a small percentage (7,4%) of the customers indicated to be open to the arrival of mobiles phones and tablets as a third retailing channel.

Lastly - although relatively small - the customers do seem to experience an imbalance between the Suitsupply on- and offline collections. On average, they indicate that both assortments are large enough, yet a more convincing score is appointed to the size of the web store collection. Overall, customers indicate that choices in products are extensive enough in both channels, but that there sometimes are a number of discrepancies to be experienced between what is offered on- and offline

Figure 24: Tested hypotheses

Tested hypotheses

H1	In the sample, customers mostly buy ready-to-wear clothing online, while mainly purchasing customized garments in the physical Suitsupply store. **REJECTED**
H2	In the sample, the most memorable experience customers indicated from the web store is the 'customer service'. **REJECTED**
H3	In the sample, the most memorable experience customers indicated from the physical store is the 'personal advice of the staff'. **RETAINED**
H4	In the sample, the visit to the web store invited the customer to also visit the physical store. **RETAINED**

H5	In the sample, the visit to the physical store invited the customer to also visit the web store. **REJECTED**
H6	In the sample, customers often orientate online; subsequently, they purchase the items in the physical store. **RETAINED**
H7	In the sample, the customers' visit to both the physical and online store was *goal-oriented*. **REJECTED**
H8	In the sample, customers indicate an imbalance between the on- and offline collections **RETAINED**
H9	In the sample, customers prefer a combination of offline, online and mobile retailing – i.e. an omnichannel retailing approach. **RETAINED**

Q5: Data-triangulation: To what extent is the vision of supply and demand side aligned?

CONFIDENTIAL INPUT – FOR MORE INFORMATION REGARDING THE DATA-TRIANGULATION IN THIS RESEARCH, PLEASE CONTACT THE RESEARCHER

<u>Research question</u>: *How can the omnichannel retailing strategy of the contemporary fashion store for men be defined?*

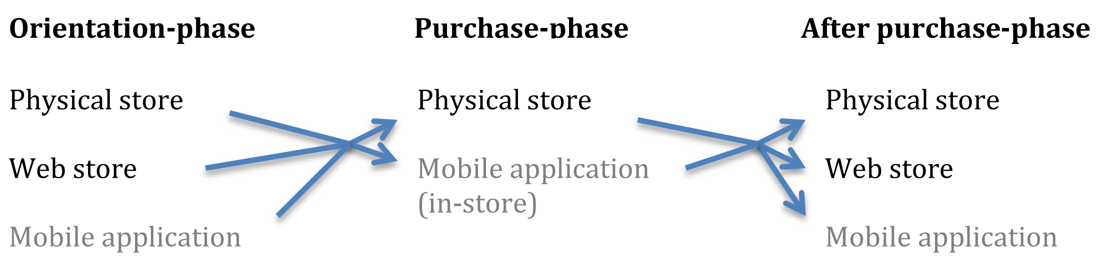
The answers to all sub-questions altogether provide the input, needed to answer the all-embracing research question of this master thesis. These sub-questions therefore offer the following conclusions regarding the definition of the contemporary, omnichannel male fashion store strategies:

In the modern-day male fashion industry, the concept of *omnichannel retailing* is recognized; yet perfect execution of this notion is only present in future intentions. Competition between online and physical retail environments seems to belong to the past, currently emphasizing the cooperating relationship between the two. However, when looking into purchase-oriented channels, demand's preference for offline stores seems to throw the spanner with respect to perfect equality among existing channels. Instead, another phenomenon can be observed.

In the case of Suitsupply, the transition towards an omnichannel retailing business model requires a true paradigm shift. Hence, instead of aiming for perfectly equal channels regarding customer purchases; consumer preferences seem to demand something different. This research shows that all retailing channels are in fact equal in *importance*, while specifically emphasizing on their *individual strengths and functions*. From this perspective onwards, physical stores retain their significant role in terms of purchases; in the Dutch market, web stores seem to function better as digital orientation-channels. The role and function of mobile devices in this omnichannel strategy remains unclear (illustrated by their grey tone in the below-presented figure). While consumers seem hesitant regarding their purchase-oriented role; time will tell if there's another function for this third retailing channel to be observed.

Based on these outcomes, the omnichannel 'purchase-cycle' – presented above – can be adjusted in the following manner:

Figure 25: Adjusted omnichannel 'purchase-cycle'



It should be taken into account that this omnichannel 'purchase-cycle' is based on the outcomes, derived from this specific case study, concerning the Dutch market. Admittedly, this cycle is generalist, proposing an illustration of the *regular* purchase-cycle of consumers in the male fashion industry. Therefore, it is well possible that a number of customer preferences deviate from this cycle – e.g. rather purchasing online or already using their mobile device for orientation. This thesis does in no way claim that the above-presented cycle is the only possible purchasing process; it is created as a general, holistic illustration of the studied attitudes and strategies in this thesis.

From this illustration onwards, it can be concluded that the notion of *creative destruction* is only present in the contemporary male fashion retailing industry in a significantly limited extent. While new channels have introduced themselves in the industry during the past years; the traditional, offline way of shopping has managed to retain its role and status. Web stores and mobile devices prove to *not* possess those specific features that underlie the success of the physical retail environment. On the other hand, synergy between these divergent characteristics is exactly what omnichannel retailing strategies are about.

Modern-day male fashion retailing shows the first steps of leaving the discussion regarding what channel conquers the others; their emphasis lies on combing them all into one, successful, holistic retailing strategy. A strategy that has the power of matching the 'old' with the 'new', and of being present to customers at any preferred time and place. It is a recurrent process, in which successful retailers are not afraid to preserve the practices that got them on top of the market in the first place. After all, they say: 'never change a winning strategy'.

6.2 Limitations

Apart from the limitations and challenges, defined in the methodology of this chapter, there are a number of additional limitations to be discussed. As mentioned repeatedly in this thesis, the first and foremost restraint of this thesis is the small sample, combined with a high number of incomplete surveys. Due to this limitation, the quantitative analysis did not allow for any generalizable conclusions. Keeping the formal limitations of a master thesis in mind, this restraint could only be reduced by offering data triangulation in the form of ten qualitative interviews. Additionally, detailed description of the methodology and operationalization of this research facilitates future studies to be undertaken.

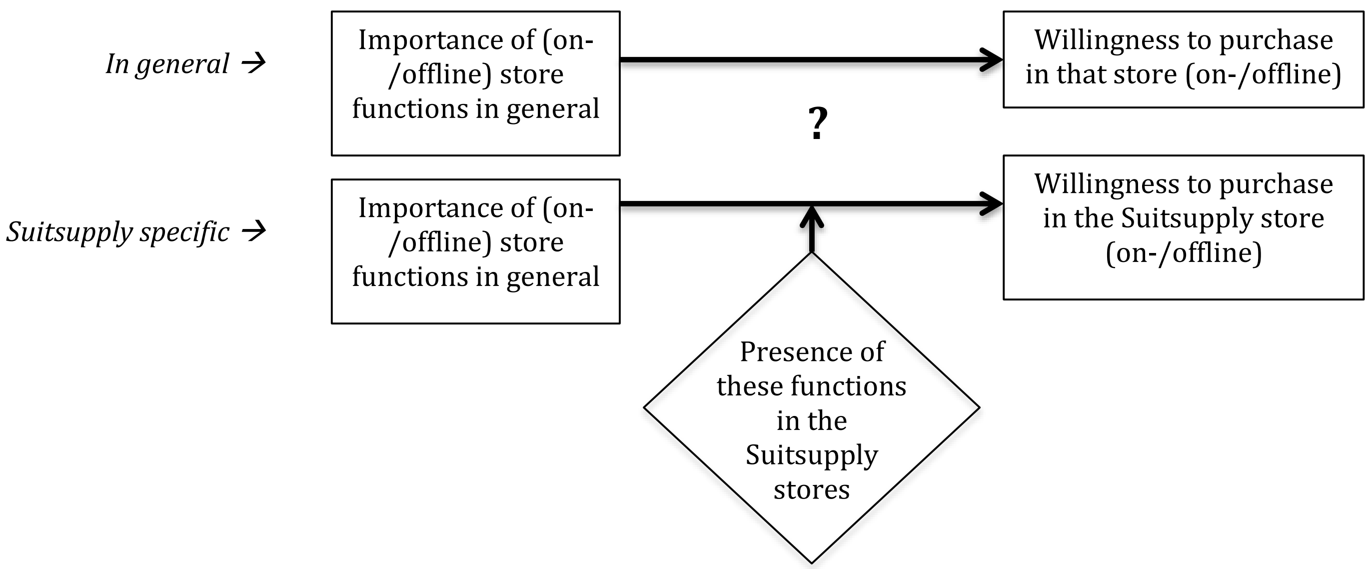
Another limitation of this thesis concerns the choice of performing a single case study. Despite significant conviction regarding the appropriateness of Suitsupply as an example of its industry; it still remains one illustration of a field that is known for its differentiation. As a result, the below-described recommendations invite for further investigation among competing fashion retailers.

6.3 Recommendations for future research

Based on both the findings and limitations that were derived from this master thesis, a number of recommendations for future research could be defined. First of all, re-testing the quantitative part of this study on a larger scale would enable generalizable conclusions with respect to Suitsupply customers' attitude. Furthermore, comparing these outcomes to other male – or even female – fashion retailer cases might offer in-depth confirmations or alterations regarding the defined strategies of the contemporary omnichannel male fashion store. However, next to these formal, yet small suggestions regarding the *descriptives* in this thesis; there is one significant recommendation for completing the envisioned holistic image of the contemporary male fashion retailing industry. Hence, when gathering data on a larger scale – based on the quantitative survey in this thesis – a number of *(moderating) effects* can be tested.

Before Suitsupply's decision to not send the survey to clients via the official Suitsupply e-mail address, the quantitative analysis was complemented with a (moderating) regression analysis. This regression analysis would firstly test the effect of the indicated importance of store aspects on shopping *in general*. In other words, this analysis indicates whether or not there is an effect to be observed from the importance of certain store functions *in general* on the overall willingness to buy in that concerning store. If so, a moderating regression analysis would have indicated whether or not the presence of these functions in the *specific* Suitsupply store(s) affected the customer's willingness to buy there. In the end, the analyses would conclude which store functions actually affect consumers' willingness-to-buy in stores in general, as well as in specific Suitsupply stores, offering an in-depth understanding of the role these stores play in contemporary male fashion retailing. A schematic image of the regression analysis is provided in figure 26.

Figure 26: Schematic image of the performed (moderating) regression analysis



Based on this schematic image, the following hypotheses arose. These hypotheses will be either retained or rejected in potential future research.

Figure 27: Recommended hypotheses

	Regression analysis	Moderating regression analysis
H0	In the population, the customers' evaluation has no effect on the frequency of on- and offline purchases	In the population, the presence of store functions in Suitsupply stores isn't interfering with the effects described in H1 & H2
H1	In the population, the customers' evaluation of the importance of general web store functions has an effect on the frequency of online purchases.	
H2	In the population, the customers' evaluation of the importance of general physical store functions has an effect on the frequency of offline purchases.	
H3		In the population, the presence of these functions in the Suitsupply web store has a moderating effect on the customers' willingness to purchase in the Suitsupply web store.
H4		In the population, the presence of these functions in the Suitsupply physical store has a moderating effect on the customers' willingness to purchase in the physical Suitsupply store.

Since the small sample size prevented from already performing the above-presented study in this thesis, scholars and fellow-students are cordially invited to 'take over the baton' and finish what this thesis has started. Only by doing so, the envisioned holistic perspective can be completed and presented to both the academic and the professional field.

REFERENCES

Aage, T. & Belussi, F. (2008). From fashion to design: creative networks in industrial districts. *Industry and Innovation, 15, 5,* p. 475 – 491. doi: 10.1080/13662710802373791

Accenture (2013). *The new omni-channel approach to serving customers. Strategy Implications for Communications Service Providers*. New York: Accenture

Allwood, J.M. & Laursen, S.E. & Rodriguez, C.M. de & Bocken, N.M.P. (2006). *Well dressed? The present and future sustainability of clothing and textiles in the United Kingdom.* Cambridge: University of Cambridge Institute for Manufacturing.

Arora, P. and Vermeylen, F. (2013) The end of the connoisseur? Experts and knowledge production in the visual arts in the digital age. *Information, Communication and Society, 16, 2,* p. 194-216.

Aubrey, C. & Judge, D. (2012). Re-imagine retail: Why store innovation is key to a brand's growth in the 'new normal', digitally-connected and transparent world. *Jounal of Brand Strategy, 1, 1*, p. 31 – 39. Retrieved from: http://henrystewart.metapress.com

Babbie, E. R. (2011). *Introduction to Social Science Research,* 5th edition. Belmont: Wadsworth Cengage Learning.

Blanco, J. F. (2011). The Postmodern Age: 1860-2010. In: Welters, L. & Lillethun, A. (eds.) (2011). *The Fashion Reader*. Second Edition. New York: Berg Publishers

BOP Consulting (2010). *British Council's creative and cultural economy series 2. Mapping the Creative Industries: A Toolkit*. London: British Council.

Brydges, T., Lavanga, M. & Gunten, L. von (2013). *Entrepreneurship in the fashion industry: a case study of slow fashion businesses.* Rotterdam: Erasmus University Rotterdam.

Carù, A. & Cova, B. (2003). Revisiting consumption experience: a more humble but complete view of the concept. *Marketing Theory, 3, 2,* p. 267 – 286. doi: 10.1177/14705931030032004

Caves, R.E. (2000). Contracts between art and commerce. *Journal of Economic Perspectives, 17, 2*, p. 73-84. Retrieved from: http://www.jstor.org/stable/

Csikszentmihalyi, M. (1996). *Creativity: Flow and the psychology of discovery and invention.* New York: HarperCollins.

Csikszentmihalyi, M. (1997*). Finding Flow*. New York: Perseus Book.

Cooper, C. (2011). The Victorian and Edwardian Eras: 1860-1910. In: Welters, L. & Lillethun, A. (eds.) (2011). *The Fashion Reader*. Second Edition. New York: Berg Publishers

Dalen, J. van (2009). *Statistische methoden en technieken. Het meten van diffuse begrippen.* [Reader] Rotterdam: Erasmus Universiteit Rotterdam.

D'Aveni, R.A. (2010). *Fashion conscious: lessons in commoditization from the fashion industry.* Retrieved from http://www.iveybusinessjournal.com/topics/strategy/fashion-conscious-lessons-in-commoditization-fromthe-fashion-industry#.UKodA7Q1-Gt on January 10th, 2014.

Diep, V. & Sweeney, J. (2008). Shopping trip value: do stores and products matter? *Journal of Retailing and Consumer Services, 15*, p. 399-409. doi: 10.1016/j.jretconser.2007.10.002

Eurogroup Consulting & GS1 Nederland (2014). *Building the shopping 2020 supply chain. Final report expert group supply chain* [Powerpoint slides]. Retrieved from: https://www.shopping2020.nl

Field, A. (2009). *Discovering statistics using SPSS*. London: Sage Publications Ltd.

Fionda, A.M. & Moore, C.M. (2008). The anatomy of the luxury fashion brand. *Journal of Brand Management, 16, 1*, p. 347 – 363. doi: 10.1057/bm.2008.45

Fiore, A.M., Lee, S. & Kunz, G. (2004). Individual differences, motivations, and willingness to use a mass customization option for fashion products. *European Journal of Marketing, 38, 7,* p. 835 – 849. doi: 10.1108/03090560410539276

Handke, C., Stepan, P. & Towse, R. (2014). Cultural Economics and the Internet. In: Latzer, M. and

Bauer, J. M. (eds.) (2014). *Handbook on the Economics of the Internet.* Cheltenham, UK: Edward Elgar.

Hemphill, C.S. & Suk, J. (2009). The law, culture and economics of fashion. *Stanford law review, 61, 1*, p. 1147 – 1199. Retrieved from: http://law.harvard.edu

Kent, T. (2003). 2D23D: Management and design perspectives on retail branding. *International Journal of Retail & Distribution Management, 31*, *3*, p. 131-142. doi: 10.1108/09590550310465503

Kotler, P. (1973). Atmospherics as a marketing tool. *Journal of Retailing, 49*, *4,* p. 48-64. Retrieved from: http://web.b.ebscohost.com

Kozinetz, R.V., Sherry, J.F., DeBerry-Spence, B., Duhachek, H., Nuttavuthisit, K & Storm, D. (2002). Themed flagship stores in the new millennium: theory, practice and prospects. *Journal of Retailing 78, 1*, p. 17-29. doi: 10.1016/S0022-4359(01)00063-X

KPMG (2013). *Consumer markets. Executive summary of the KPMG study "Trends in retail 2020".* Hamburg: KPMG AG

Lavanga, M. (2012; forthcoming). *Fashion designers and the changing role of international fashion fairs.* Rotterdam: Erasmus University Rotterdam

Lillethun, A. (2011). *Introduction to the psychology of fashion*. In: Welters, L. & Lillethun, A. (eds.) (2011). The Fashion Reader. Second Edition. New York: Berg Publishers

Lipovetsky, G. (1994). *The empire of fashion. Dressing modern democracy.* New Jersey: Princeton University Press

MacGillivray, M.S. & Hahn, M.A. (2003). The fashion consumer in the global marketplace. *Textile progress, 33, 3,* p. 1 – 47. doi: 10.1080/00405160308688959

Magrath, V. & McCormick, H. (2013). Branding design elements of mobile fashion retail apps. *Journal of Fashion Marketing and Management, 17, 1,* p. 98 – 114. doi: 10.1108/13612021311305164

Marchetti, L. (2009). From the object to the invisible: retail experience within space, fashion and body. In Brand, J., Teunissen, J. & Muijnck, C. de (ed.). *Fashion and imagination. About clothes and art.* Arnhem: ArtEZ Press, d' jongeHond.

Maslow, A.H. (1970). *Motivation and personality. Second Edition.* New York: Harper and Row

Meyer, C. & Schwager, A. (2007). Understanding customer experience. *Harvard Business Review, 85*, *2,* p. 116-126. Retrieved from: http://zurichhpdelivered.com

Moore, C.M., Doherty, A.M. & Doyle, S.A. (2008). Flagship stores as a market entry method: the perspective of luxury fashion retailing. *European Journal of Marketing, 44, 1-2*, p. 139-161. doi: 10.1108/03090561011008646

Nakamura, L.I. (2000). Economics and the new economy: the invisible hand meets creative destruction. *Federal Reserve Bank of Philadelphia, Business Review, July/August,* p. 15–30. Retrieved from: http://www.philadelphiafed.org/

Petermans, A. (2012). *Retail design in the experience economy: conceptualizing and 'measuring' customer experiences in retail environments.* (Doctoral dissertation). Hasselt: Universiteit Hasselt.

Petermans, A. & Kent, A. (2013). *Design for experience in the fashion industry: coping strategies in the era of homogenization*. Poster presentation at the second workshop on Fashioning Management, Antwerp, Belgium.

Pine, J. II (1993), *Mass Customization: The new frontier in business competition.* Harvard Boston, MA: Business School Press.

Pine, J.B. II & Gilmore, J.H. (1998). Welcome to the experience economy. *Harvard Business Review, 4,* p. 97 – 106. Retrieved from: http://hbr.org/

Pine, J.B. II & Gilmore, J.H. (1999). *The experience economy: work Is theater and every business a stage.* Boston, MA: Harvard Business School Press

Polese, F. (2013). Departments stores, mail order catalogues and the fashion market: Italy in the late 19th century. Milan: Bocconi University Milan

Pookulangara, S. & Shephard, A. (2013). Slow fashion movement: Understanding consumer perceptions. An exploratory study. *Journal of Retailing and Consumer Services 20, 1*, p. 200 – 206. doi: 10.1016/j.jretconser.2012.12.002

PwC & Kantar Retail (2012). *Retailing 2020: Winning in a polarized world*. New York & Cambridge, MA: PricewaterhouseCoopers LLP and Kantar Retail LLC

Raeve, A. de, Cools, J., Smedt, M. de & Bossaer, H. (2012). *Mass customization, business model for the future of fashion industry.* Poster presentation at the third Global Fashion International Conference, Madrid, Spain.

Robinson, D.E. (1961). The Economics of Fashion Demand. *The Quarterly Journal of Economics, 75, 3,* p. 376-398. doi: 10.2307/1885130

Rueling, C.C. (2000). Theories of (Management?) Fashion: the Contributions of Veblen, Simmel, Blumer, and Bourdieu . Geneva: Université de Genève.

Scarpi, D., Pizzi, G. & Visentin, M. (2014). Shopping for fun or shopping to buy: Is it different online and offline? *Journal of Retailing and Consumers Services, 21, 1,* p. 258 – 267. doi: 10.1016/j.jretconser.2014.02.007

Schor, J. B. (2010). *Plentitude: The new economics of true wealth.* New York: The Penguin Press HC

Schumpeter, J. A. (2003). Capitalism, socialism and democracy. New York: Routledge

Scott, A.J. (2014). Beyond the creative city: cognitive–cultural capitalism and the new urbanism. *Regional Studies, 48, 4*, p. 565 - 578. DOI: 10.1080/00343404.2014.891010

Sleeswijk Visser, F. (2009). *Bringing the everyday life of people into design.* (Doctoral dissertation). Delft: Technische Universiteit Delft. Retrieved from: http://repository.tudelft.nl

Smith, A. (1976). *An inquiry into the nature and causes of the wealth of nations*. Chicago: The University of Chicago Press

Thomas, D.R. (2006) A general inductive pproach for analyzing qualitative evaluation data. *American Journal of Evaluation, 27*, 2, p. 237-246. doi: 10.1177/1098214005283748

UNCTAD (2008). *Creative economy report 2008. The challenge of accessing the creative economy: towards informed policy-making.* Geneva: United Nations

UNESCO (2000). *Culture, trade and globalization: questions and answers*. Paris: UNESCO Publishing

Webber, T. (2011). The Modern Era: 1910-1960. In: Welters, L. & Lillethun, A. (eds.) (2011). *The Fashion Reader*. Second Edition. New York: Berg Publishers

Wolters, M. (2013). *Hoe shopt uw klant in 2020? GFK Expertonderzoek shopping 2020* [Powerpoint slides]. Retrieved from: https://www.shopping2020.nl

APPENDICES

Appendix I – Qualitative interview

Naam: Afdeling: Functie: Datum:

<u>Kun je me iets vertellen over jouw werk? (Verleden?)</u>

<u>Wat is de huidige functie van de webshop (rol binnen de retailing strategie)?</u>

(Wie koopt wat wanneer en waar?)
Op het gebied van:
- *Klant (doelgroepen/wensen)*
- *Product;*
- *Service; en*
- *Experience;*

Op welke manier zijn deze elementen zichtbaar/vertegenwoordigd?
Data aanwezig?

<u>Welke rol speelt de huidige offline store?</u>

(Wie koopt wat wanneer en waar?)
Op het gebied van:
- *Product;*
- *Service;*
- *Experience; en*
- *Klant (doelgroepen/wensen)*

Op welke manier zijn deze elementen zichtbaar/vertegenwoordigd?
<u>Toegevoegde waarde</u>

<u>Wat is – naar jouw mening - de verhouding tussen on- en offline shoppen? Evaluatie?</u>

Aanvullend versus concurrerend

<u>*Aanvullende onderwerpen, afhankelijk van functie:*</u>
- 'Curatorship' - *winkeldesign + klantzijde: made-to-measure/customizing*
- Local versus global-elementen
- Concurrentie (fast) fashion labels
- Verhouding en plaats in high-, middle, low-end segmenten: *haute couture tot confectie*

<u>Wat is de huidige 'signature' van Suitsupply?</u>

Wat verklaart – volgens jou - het succes van Suitsupply?
USP

<u>Toekomstvisie?</u>
- On- & offline retailing (omnichannel: smartphones & tablets?)
- Product/segment(en)
- Klant
- Experience design

English version

Name: Department: Function: Date:

Tell me about your work within Suitsupply? (History?)

What's the contemporary role/function of the webstore/m-store within the retailing strategy?

(Who buys what where and when?)

With regard to:

- Customer (target audiences/desires)
- Product;
- Service;
- Experience;

  How are these elements visible/present in the store?

  Data available?

Which role does the present-day offline store play?

With regard to:

- Product;
- Service;
- Experience;
- Customer (target audiences/desires)

  How are these elements visible/present in the store?

  Added value

What's – in your opinion - the relationship between the on- and offline store? Evaluation?

Complementary versus competitive

Additional topics, depending on function of the interviewee:

- Curatorship: store design + demand side: made-to-measure/(mass) customization
- Local versus global elements
- Competition of (fast) fashion labels
- Ratio and place in high-, middle and low-end segments: haute couture – confection

What's the current 'signature' of Suitsupply?

How can – according to you - the success of Suitsupply be explained?

USP

Future vision?

- Omnichannel retailing (m-commerce: tablets and smartphones?
- Product/segment(s)
- Customer
- Experience design
- USP

Appendix II – Quantitative survey

Block 1

Beste Suitsupply-klant,

Bij voorbaat dank voor je deelname aan deze korte enquête. Jouw mening is van groot belang bij het evalueren en optimaliseren van de (web) winkel.

Om deze reden steunt Suitsupply dit onafhankelijke onderzoek, waarin je wordt uitgenodigd om op anonieme wijze je voorkeuren ten opzichte van het on- en/of offline winkelen bij Suitsupply te delen. Door middel van jouw mening kunnen we de winkels in de toekomst nog beter aansluiten op uw wensen.Geef daarom alstublieft aan wat voor jou van toepassing is.

Voor meer informatie met betrekking tot dit onderzoek kun je contact opnemen met: service@suitsupply.com

Default Question Block

Geslacht

- Man
- Vrouw

Leeftijd

Nationaliteit

Hoogst genoten opleiding

- Lagere school
- Middelbare school
- MBO
- HBO/WO

- PhD

Functie

Heb je ooit iets gekocht bij Suitsupply?

- Ja
- Nee

Waar heb je ooit iets bij Suitsupply gekocht?

	- -	-	VAAK	+	++
In de web store					
In de fysieke winkel					

Vul in wat voor jou van toepassing is

	- -	-	EENS	+	++
Ik koop regelmatig kleding online					

Vul in wat voor jou van toepassing is:

Ik bezoek een web store met als doel:

	- -	-	VAAK	+	++
Het aankopen van een artikel					
Het oriënteren op artikelen.					
Het ervaren van een plezierige winkelbeleving					

Toelichting:

Wat heb je in de web store van Suitsupply gekocht?

	- -	-	VAAK	+	++
Ready-to-wear kleding*					
Accessoires					

Anders, namelijk:

* Bestaand design, vaststaande maten, vaststaande stoffen

Wanneer ik producten online koop, zijn de volgende factoren van belang:

	- -	-	EENS	+	++
Een goede presentatie van de producten					
Het ruime aanbod van de producten					
Het gemak waarmee het bezorgd wordt					
De beschikbare informatie over de producten					
De klantenservice (ruilen, retourneren)					

Anders, namelijk

In hoeverre waren deze factoren aanwezig in de Suitsupply web store?

	- -	-	AANWEZIG	+	++
Een goede presentatie van de producten	◯	◯	◯	◯	◯
Een ruim aanbod van de producten	◯	◯	◯	◯	◯
Het gemak waarmee het bezorgd wordt	◯	◯	◯	◯	◯
De beschikbare informatie van de producten	◯	◯	◯	◯	◯
De klantenservice (ruilen, retourneren)	◯	◯	◯	◯	◯

Toelichting:

Wat is jou het meest bijgebleven aan de SUITSUPPLY web store?

Vul in wat voor jou van toepassing is:

	- -	-	EENS	+	++
Mijn bezoek aan de web store nodigde mij uit om ook de fysieke winkel te bezoeken	◯	◯	◯	◯	◯
De web store is voor mij de plek om mij te oriënteren op de producten; het kopen van de producten doe ik vervolgens liever in de fysieke winkel	◯	◯	◯	◯	◯
Het assortiment in de Suitsupply web store is naar mijn mening groot genoeg	◯	◯	◯	◯	◯

Toelichting:

Vul in wat voor jou van toepassing is:

	- -	-	EENS	+	++
Ik koop regelmatig kleding offline - in een fysieke winkel	○	○	○	○	○

Vul in wat voor jou van toepassing is:

Ik bezoek een fysieke winkel met als doel:

	- -	-	VAAK	+	++
Het aankopen van een product	○	○	○	○	○
Het oriënteren op producten	○	○	○	○	○
Het ervaren van een plezierige winkelbeleving	○	○	○	○	○

Toelichting:

Wat heb je offline bij Suitsupply gekocht?

	- -	-	VAAK	+	++
Ready-to-wear kleding *	○	○	○	○	○
Maatwerk **	○	○	○	○	○
Accessoires	○	○	○	○	○

Anders namelijk:

* Bestaand design, vaststaande maten, vaststaande stoffen
** Maatwerk: gereed product, evt. aangepast door de kleermaker

Wat is je het meest bijgebleven aan uw bezoek aan de fysieke winkel van Suitsupply?

Wanneer ik producten in een fysieke winkel koop, zijn de volgende factoren van belang:

	- -	-	EENS	+	++
Het kunnen voelen/passen van de kleding					
De mogelijkheid om mijn kleding zelf samen te stellen/te customizen					
De aanwezigheid van een kleermaker					
Persoonlijk advies van winkelpersoneel					
De gehele winkelbeleving					

Anders namelijk:

In hoeverre waren deze factoren aanwezig in de fysieke winkel van Suitsupply?

	- -	-	AANWEZIG	+	++
Het kunnen voelen/passen van de kleding					
De mogelijkheid om mijn kleding zelf samen te stellen/te customizen					
De aanwezigheid van een kleermaker					
Persoonlijk advies van winkelpersoneel					
De gehele winkelbeleving					

Toelichting:

Vul in wat voor jou van toepassing is:

	- -	-	EENS	+	++
Mijn bezoek aan de fysieke Suitsupply winkel nodigde mij uit om ook de web store te bezoeken	○	○	○	○	○
Ik orienteer mij op producten in de fysieke winkel, maar ik koop deze liever via de web store	○	○	○	○	○
Het assortiment in de fysieke winkel van Suitsupply is naar mijn mening groot genoeg	○	○	○	○	○

Toelichting:

Heb je een voorkeur voor één van de Suitsupply verkoopkanalen?

- ○ Nee, ik shop zowel graag online als in een fysieke winkel
- ○ Nee, ik shop graag online als in de fysieke winkel, en vind shoppen via mijn mobiel of tablet een goede toevoeging
- ○ Ja, ik koop mijn kleding het liefst online
- ○ Ja, ik koop mijn kleding het liefst in een fysieke winkel
- ○ Ja, ik zou mijn kleding het liefst via mijn mobiel of tablet kopen

Geef aan wat voor jou van toepassing is:

In de Suitsupply winkels mis ik/zou ik graag ... willen:

Onder de deelnemers wordt een das verloot.
Indien je hiervoor in aanmerking wilt komen, vul dan hieronder je e-mailadres in:

Bedankt voor je deelname aan dit onderzoek. Jouw voorkeuren en suggesties zullen worden meegenomen in het optimaliseren van de Suitsupply (web) winkel. Suitsupply hoopt je daarmee nog vele malen in de winkels te mogen verwelkomen.

Appendix III – Expert phase interview summaries

III.1.1 Conversation with Aynouk Tan – 15 minutes

On January 9, 2014 fashion consultant and journalist Aynouk Tan paid a visit to the Erasmus University Rotterdam. In an informal, personal conversation with Mrs Tan, she expressed her vision of modern-day fashion stores, going through a recurrent process in which interaction and personal contact is highly emphasized. She described the strategy of befriended designer Anne de Grijff as the following: customers make appointments to visit the store instead of the retailer working on general opening hours. According to Tan, this phenomenon is not new; on a contrary, serving customers on the basis of appointments is in fact very 'old-fashioned' and already visible in the form of tailors in the agricultural economy.

Mrs Tan added that this traditional way of fashion retailing is modernized by staging experiences, searching for a so-called 'new fashion system'. This system to a certain extent relates to Marchetti's (2009) forecast: contemporary designers such as de Grijff invite customers to special events and dinners, integrating innovative ways of presenting a new collection - e.g. via photography – and stepping away from the assumption that the fashion product is the most important/central feature of fashion. Contemporary stores are in that sense focused on a personal relationship with customers in which a match between the design and the customer's character is more important than solely the design 'an sich'.

Key concepts: recurrent process – new fashion system - personal – experiences - relationship

III.1.2 Conversation with STUDIObyJudithTerHaar – 90 minutes

In a second interview on February 27, 2014, the vision of two ArtEZ Fashion Master alumni was discussed. Amber Zeekaf and Martine Bovee – currently employed by STUDIObyJudithTerHaar – performed a research in which pioneering retailers were 'mapped'. The Road Map – end product of their study – presents a number of retailing strategies that successfully go against the influence of impersonal multinationals. According to Zeekaf and Bovee, the strength of local, physical stores lies in the community, initiating customer curatorship through co-creation; retaining cultural heritage and supporting the crucial usage of craftsmanship.

Next to the rise of small, local retailing initiatives, the alumni envision another phenomenon: the co-existence of on- and offline retailing environments. The 'paradox' of the on- and offline settings as being *one world*, was already introduced by EBay Now. On a website, this platform demonstrates a number of demanded items and immediately refers to a local supplier in the neighbourhood of the customer that has this item in its collection. One to two hours later, the product can already be delivered at the customer's address.

Key concepts: local, physical – community – curatorship/co-creation – craftsmanship - bringing the online offline/global local

III.1.3 Conversation with Niels van de Vorst – Suitsupply – 60 minutes

Lastly, on March 13, Visual Merchandiser Niels van de Vorst introduced Suitsupply's vision with regard to on- and offline retailing. Mr van de Vorst articulated the difference between their on- and offline strategy as follows: online retailing isn't personal. The input we offer on our website is more informative, general. The informative character mainly focuses on providing consumers enough information to buy our designs online. Yet, due to the limitations of one-sided communication (only from the website towards the client, not reversely), the information should attract and satisfy a broad target audience. For this reason, online retailing isn't as personal as in the physical stores. Still, Suitsupply tries to bridge the gap between the web and offline stores, by designing ways to bring these worlds together. How the organization will achieve this is not clear (yet).

Although personal contact and curatorship – by offering possibilities to compose a unique suit - is highly important for Suitsupply, the organization retains its freedom in figuring out what's best for the client. According to van de Vorst, the Suitsupply staff doesn't ask which size a customer has; it is the expertise of the company to find the right measurements. Another example of this almost educating role is the determination in *not* offering items that simply don't match Suitsupply's vision of fashion, such as black pants or ivory shirts. After all, van de Vorst states, a combination of both the customers' satisfaction *and* the suit is the company's 'signature'.

Due to the International success and recognition, it is interesting to study *what* exactly makes a Suitsupply special. According to van de Vorst, it is the unique aspects of each store. Every store shows differences in visual merchandising. The biggest distinctions are visible in the International shops. The organization has employees in each country who constantly monitor local trends and events that engage and/or reflect the community. As an example, van de Vorst describes the store in Shanghai - designed as a Chinese loft – and the new stores in the United States – decorated with a number of private rooms for the sense of luxury that accompanies professional tailoring. Creating unique, culture-reflecting retail environments within a chain that has to stay recognizable is the organization's main challenge regarding offline experience design.

Key concepts: online: informative/offline: personalized – co-existing on- and offline retailing – curatorship – educative role – culture-reflecting experience design

Appendix IV – Photographs, taken in Suitsupply stores

CONFIDENTIAL INPUT – FOR ACCESS TO ALL PHOTOGRAPHS OF THE STUDIED SUITSUPPLY STORES, PLEASE CONTACT THE RESEARCHER

Appendix V – SPSS data

Gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Male	29	96,7	96,7	96,7
	Female	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

Age

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	19	1	3,3	3,3	3,3
	21	1	3,3	3,3	6,7
	23	4	13,3	13,3	20,0
	24	4	13,3	13,3	33,3
	25	6	20,0	20,0	53,3
	26	9	30,0	30,0	83,3
	28	1	3,3	3,3	86,7
	30	1	3,3	3,3	90,0
	32	1	3,3	3,3	93,3
	49	1	3,3	3,3	96,7
	52	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

Highest level of education

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	High School	1	3,3	3,3	3,3
	Secondary Vocational Education	2	6,7	6,7	10,0
	University (of applied sciences)	27	90,0	90,0	100,0
	Total	30	100,0	100,0	

Function

	Frequency	Percent	Valid Percent	Cumulative Percent
	5	16,7	16,7	16,7
Adviseur	1	3,3	3,3	20,0
Assistant Transaction Services	1	3,3	3,3	23,3
Commercieel management trainee	1	3,3	3,3	26,7
Consultant	6	20,0	20,0	46,7
Directeur	1	3,3	3,3	50,0
Eigenaar	1	3,3	3,3	53,3
Marketeer	1	3,3	3,3	56,7
Marketing	1	3,3	3,3	60,0
Programma manager	1	3,3	3,3	63,3
Retail	1	3,3	3,3	66,7
stagiair	1	3,3	3,3	70,0
student	1	3,3	3,3	73,3
Student	5	16,7	16,7	90,0
Student/Marketing consultant	1	3,3	3,3	93,3
Systeembeheerder	1	3,3	3,3	96,7
Teamleider	1	3,3	3,3	100,0
Total	30	100,0	100,0	

Where did you ever purchase something at Suitsupply-in the web store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	16	53,3	80,0	80,0
	Rarely	1	3,3	5,0	85,0
	Sometimes	2	6,7	10,0	95,0
	Often	1	3,3	5,0	100,0
	Total	20	66,7	100,0	
Missing	System	10	33,3		
Total		30	100,0		

Where did you ever purchase something at Suitsupply -In the physical store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely	8	26,7	28,6	28,6
	Sometimes	5	16,7	17,9	46,4
	Often	8	26,7	28,6	75,0
	Very often	7	23,3	25,0	100,0
	Total	28	93,3	100,0	
Missing	System	2	6,7		
Total		30	100,0		

Have you ever purchased something at Suitsupply?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Yes	30	100,0	100,0	100,0

I regularly buy clothes online

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	2	6,7	18,2	18,2
	Rarely	4	13,3	36,4	54,5
	Sometimes	2	6,7	18,2	72,7
	Often	2	6,7	18,2	90,9
	Very often	1	3,3	9,1	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

I visit a webstore with the aim: Purchasing an item

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely	5	16,7	55,6	55,6
	Sometimes	1	3,3	11,1	66,7
	Often	3	10,0	33,3	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

I visit a webstore with the aim: Orientation on items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely	1	3,3	10,0	10,0
	Often	5	16,7	50,0	60,0
	Very often	4	13,3	40,0	100,0
	Total	10	33,3	100,0	
Missing	System	20	66,7		
Total		30	100,0		

I visit a webstore with the aim: Experiencing a pleasurable store-experience

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	1	3,3	11,1	11,1
	Rarely	3	10,0	33,3	44,4
	Sometimes	4	13,3	44,4	88,9
	Often	1	3,3	11,1	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

What did you buy in the Suitsupply web store? - Ready-to-wear items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	8	26,7	72,7	72,7
	Often	2	6,7	18,2	90,9
	Very often	1	3,3	9,1	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

What did you buy in the Suitsupply web store? - Accessories

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	9	30,0	81,8	81,8
	Often	2	6,7	18,2	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

When I purchase products online, the following factor is important: A good presentation of the products

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Agree	5	16,7	45,5	45,5
	Strongly agree	6	20,0	54,5	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

When I purchase products online, the following factor is important: The wide range of products offered

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	4	13,3	36,4	36,4
	Agree	2	6,7	18,2	54,5
	Strongly agree	5	16,7	45,5	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

When I purchase products online, the following factor is important: The convenience regarding delivery

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	1	3,3	9,1	9,1
	Agree	4	13,3	36,4	45,5
	Strongly agree	6	20,0	54,5	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

When I purchase products online, the following factor is important: Present product-information

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Agree	5	16,7	45,5	45,5
	Strongly Agree	6	20,0	54,5	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

When I purchase products online, the following factor is important: The customer service (exchanges, returns)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	2	6,7	18,2	18,2
	Agree	2	6,7	18,2	36,4
	Strongly agree	7	23,3	63,6	100,0
	Total	11	36,7	100,0	
Missing	System	19	63,3		
Total		30	100,0		

To what extent was this factor present at the Suitsupply web store: - A good presentation of the products

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not present at all	1	3,3	11,1	11,1
	Neutral	2	6,7	22,2	33,3
	Relatively present	4	13,3	44,4	77,8
	Strongly present	2	6,7	22,2	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

To what extent was this factor present at the Suitsupply web store: - The wide range of products offered

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not present at all	1	3,3	11,1	11,1
	Neutral	2	6,7	22,2	33,3
	Relatively present	5	16,7	55,6	88,9
	Strongly present	1	3,3	11,1	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

To what extent was this factor present at the Suitsupply web store: - The convenience regarding delivery

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not present at all	1	3,3	11,1	11,1
	Rarely present	1	3,3	11,1	22,2
	Neutral	3	10,0	33,3	55,6
	Relatively present	1	3,3	11,1	66,7
	Strongly present	3	10,0	33,3	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

To what extent was this factor present at the Suitsupply web store: - Present product information

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not present at all	1	3,3	11,1	11,1
	Neutral	5	16,7	55,6	66,7
	Relatively present	2	6,7	22,2	88,9
	Strongly present	1	3,3	11,1	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

To what extent was this factor present at the Suitsupply web store: -The customer service (exchanges, returns)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Not present at all	1	3,3	11,1	11,1
	Rarely present	1	3,3	11,1	22,2
	Neutral	3	10,0	33,3	55,6
	Relatively present	1	3,3	11,1	66,7
	Strongly present	3	10,0	33,3	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

What about the Suitsupply web store was the most memorable to you?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		25	83,3	83,3	83,3
	Goede ervaring met de klantenservice op verschillende gebieden	1	3,3	3,3	86,7
	het corporate karakter	1	3,3	3,3	90,0
	Mogelijke kleuren combinaties	1	3,3	3,3	93,3

	Overzichtelijkheid, consistentie	1	3,3	3,3	96,7
	Rommelig	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

My visit to the web store invited me to also visit the physical store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Disagree	2	6,7	20,0	20,0
	Neutral	2	6,7	20,0	40,0
	Agree	3	10,0	30,0	70,0
	Strongly agree	3	10,0	30,0	100,0
	Total	10	33,3	100,0	
Missing	System	20	66,7		
Total		30	100,0		

To me, the webstore is a place to orientate on products; i prefer to buy the products in the physical store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	1	3,3	10,0	10,0
	Neutral	2	6,7	20,0	30,0
	Agree	3	10,0	30,0	60,0
	Strongly agree	4	13,3	40,0	100,0
	Total	10	33,3	100,0	
Missing	System	20	66,7		
Total		30	100,0		

The assortment of the Suitsupply web store is large enough

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	2	6,7	22,2	22,2
	Agree	3	10,0	33,3	55,6
	Strongly agree	4	13,3	44,4	100,0
	Total	9	30,0	100,0	
Missing	System	21	70,0		
Total		30	100,0		

I regularly purchase clothes offline - in a physical store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Disagree	1	3,3	3,7	3,7
	Neutral	5	16,7	18,5	22,2
	Agree	13	43,3	48,1	70,4
	Strongly agree	8	26,7	29,6	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

I visit a physical store with the aim: -Purchasing a product

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Disagree	2	6,7	8,0	8,0
	Neutral	6	20,0	24,0	32,0
	Agree	9	30,0	36,0	68,0
	Strongly disagree	8	26,7	32,0	100,0
	Total	25	83,3	100,0	
Missing	System	5	16,7		
Total		30	100,0		

I visit a physical store with the aim: - Orientation on the products

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	1	3,3	4,0	4,0
	Rarely	3	10,0	12,0	16,0
	Sometimes	3	10,0	12,0	28,0
	Often	15	50,0	60,0	88,0
	Very often	3	10,0	12,0	100,0
	Total	25	83,3	100,0	
Missing	System	5	16,7		
Total		30	100,0		

I visit a physical store with the aim: - Experiencing a pleasurable store-experience

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	2	6,7	8,0	8,0
	Rarely	6	20,0	24,0	32,0
	Sometimes	5	16,7	20,0	52,0
	Often	9	30,0	36,0	88,0
	Very often	3	10,0	12,0	100,0
	Total	25	83,3	100,0	
Missing	System	5	16,7		
Total		30	100,0		

Motivation for visit physical store:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		26	86,7	86,7	86,7
	Als man zijnde is het winkelen naar kleding over het algemeen nooit een plezierige winkelbeleving. Als er een online winkel was die aan al mijn wensen voldeed (qua type kleding) en altijd mijn maat had (en niet per seizoen wisselt), zou ik enkel nog onlin kopen.	1	3,3	3,3	90,0
	Het gaat mij meestal erom dat ik iets in de hand wil hebben voor dat ik het koop. Dus dat ik het ook kan passen, zo nodig een andere maat kan verkrijgen etc.	1	3,3	3,3	93,3
	Ik stap de fysieke winkel eigenlijk pas binnen als ik besloten heb iets te kopen. De webwinkel is vooral oriëntatie. De winkelbeleving moet prettig zijn, maar is niet iets wat ik op zoek.	1	3,3	3,3	96,7

	Ik vind beleving belangrijk tijdens het kopen van kleding; voelen hoe de kleding zit, hoe het er in zijn geheel uit ziet.	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

What did you buy in the Suitsupply physical store? - Ready-to-wear items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	5	16,7	19,2	19,2
	Rarely	5	16,7	19,2	38,5
	Sometimes	3	10,0	11,5	50,0
	Often	9	30,0	34,6	84,6
	Very often	4	13,3	15,4	100,0
	Total	26	86,7	100,0	
Missing	System	4	13,3		
Total		30	100,0		

What did you buy in the Suitsupply physical store? - Custom-made items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	10	33,3	38,5	38,5
	Rarely	2	6,7	7,7	46,2
	Sometimes	3	10,0	11,5	57,7
	Often	7	23,3	26,9	84,6
	Very often	4	13,3	15,4	100,0
	Total	26	86,7	100,0	
Missing	System	4	13,3		
Total		30	100,0		

What did you buy in the Suitsupply physical store? - Accessories

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Never	6	20,0	22,2	22,2
	Rarely	5	16,7	18,5	40,7
	Sometimes	4	13,3	14,8	55,6

	Often	8	26,7	29,6	85,2
	Very often	4	13,3	14,8	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

Other products, namely:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		28	93,3	93,3	93,3
	Afspraak voor eerste maatwerk volgende week ;-)	1	3,3	3,3	96,7
	Nooit.	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

What about the physical Suitsupply store was the most memorable to you?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		10	33,3	33,3	33,3
	De kleding maker neemt ter plekke het pak in	1	3,3	3,3	36,7
	De layout van de winkel. De dassenetalage is echt heel mooi gemaakt, het lijkt bijna op een muur met alle kleuren van de regenboog.	1	3,3	3,3	40,0
	De service. Ze nemen ECHT de tijd voor je en proberen je geen poot uit te draaien.	1	3,3	3,3	43,3
	De uitvoerige en uitgebreide collectie en de klantvriendelijkheid	1	3,3	3,3	46,7
	Erg netjes! Toffe winkel, toffe uitstraling. Wel erg veel keus!!!	1	3,3	3,3	50,0
	Goede prijs/kwaliteit, vriendelijk personeel, gevoel van deskundigheid qua pasvorm	1	3,3	3,3	53,3

	goede service	1	3,3	3,3	56,7
	Klantvriendelijkheid	1	3,3	3,3	60,0
	Kundig personeel	1	3,3	3,3	63,3
	Mooi uitgebreid stropdassenrek, verschil tussen ruimte met maatpakken en ruimte met pakken uit het rek.	1	3,3	3,3	66,7
	Mooie indeling, parket vloeren, goede service maar niet opdringerig, strak geklede mannen, veel aanbod	1	3,3	3,3	70,0
	Netheid, service	1	3,3	3,3	73,3
	Overzichtelijkheid, design, gemak	1	3,3	3,3	76,7
	Personeel heeft het druk (te weinig personeel), zijn beleefd en uitgebreid advies.	1	3,3	3,3	80,0
	Persoonlijke aandacht van verkoper die ook het opmeten deed. Daarnaast de strakke inrichting met pakken aan de wand en de wand met stropdassen. Geeft jong en fris gevoel, i.p.v. de zaken voor ouwe lui.	1	3,3	3,3	83,3
	Prettig personeel, mooie aankleding. Hierdoor krijg je een goede indruk om mooie combinaties uit te zoeken	1	3,3	3,3	86,7
	Prettige bediening. Beperkt assortiment.	1	3,3	3,3	90,0
	Sales medewerker herkende me nog na maanden	1	3,3	3,3	93,3
	Strak ingerichte en goed verzorgde winkel.	1	3,3	3,3	96,7

	Vriendelijke mensen die veel van de producten af weten. Ook bij terugkomst herkennen ze je vaak nog wat een extra persoonlijke dimensie geeft.	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

When I purchase products offline, the following factor is important: - The possibility to touch and try on the items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	1	3,3	3,7	3,7
	Agree	10	33,3	37,0	40,7
	Strongly agree	16	53,3	59,3	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

When I purchase products offline, the following factor is important: - The possibility to curate/customize my items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	2	6,7	7,4	7,4
	Disagree	8	26,7	29,6	37,0
	Neutral	6	20,0	22,2	59,3
	Agree	5	16,7	18,5	77,8
	Strongly agree	6	20,0	22,2	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

When I purchase products offline, the following factor is important: - The presence of a tailor

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Disagree	4	13,3	14,8	14,8
	Neutral	6	20,0	22,2	37,0

	Agree	11	36,7	40,7	77,8
	Strongly agree	6	20,0	22,2	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

When I purchase products offline, the following factor is important: - Personal advice from the store personnel

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	2	6,7	7,4	7,4
	Disagree	1	3,3	3,7	11,1
	Neutral	5	16,7	18,5	29,6
	Agree	13	43,3	48,1	77,8
	Strongly agree	6	20,0	22,2	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

When I purchase products offline, the following factor is important: - The entire store-experience

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	1	3,3	3,7	3,7
	Disagree	2	6,7	7,4	11,1
	Neutral	8	26,7	29,6	40,7
	Agree	9	30,0	33,3	74,1
	Strongly agree	7	23,3	25,9	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

To what extent was this factor present in the physical Suitsupply store? - The possibility to touch and try on the items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely present	1	3,3	3,7	3,7
	Neutral	4	13,3	14,8	18,5
	Relatively present	10	33,3	37,0	55,6

	Strongly present	12	40,0	44,4	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

To what extent was this factor present in the physical Suitsupply store? - The possibility to curate/customize my items

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely present	2	6,7	7,4	7,4
	Neutral	5	16,7	18,5	25,9
	Relatively present	14	46,7	51,9	77,8
	Strongly present	6	20,0	22,2	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

To what extent was this factor present in the physical Suitsupply store? - The presence of a tailor

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Neutral	3	10,0	11,1	11,1
	Relatively present	8	26,7	29,6	40,7
	Strongly present	16	53,3	59,3	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

To what extent was this factor present in the physical Suitsupply store? - Personal advice from the store personnel

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely present	1	3,3	3,7	3,7
	Neutral	2	6,7	7,4	11,1
	Relatively present	13	43,3	48,1	59,3
	Strongly present	11	36,7	40,7	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

To what extent was this factor present in the physical Suitsupply store? - The entire store-experience

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Rarely present	1	3,3	3,7	3,7
	Neutral	6	20,0	22,2	25,9
	Relatively present	14	46,7	51,9	77,8
	Strongly present	6	20,0	22,2	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

Motivation:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		29	96,7	96,7	96,7
	Door het beperkte assortiment id. winkel kon ik niet alles wat ik online gezien heb ook echt bekijken/voelen.	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

My visit to the physical Suitsupply store invited my to also visit the web store:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	4	13,3	15,4	15,4
	Disagree	9	30,0	34,6	50,0
	Neutral	6	20,0	23,1	73,1
	Agree	6	20,0	23,1	96,2
	Strongly agree	1	3,3	3,8	100,0
	Total	26	86,7	100,0	
Missing	System	4	13,3		
Total		30	100,0		

To me, I orientate on products in the physical store, but I prefer to purchase these items via the web store

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	13	43,3	50,0	50,0
	Disagree	11	36,7	42,3	92,3

		Frequency	Percent	Valid Percent	Cumulative Percent
	Neutral	1	3,3	3,8	96,2
	Strongly agree	1	3,3	3,8	100,0
	Total	26	86,7	100,0	
Missing	System	4	13,3		
Total		30	100,0		

To me, the assortment of the physical Suitsupply store is large enough

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Strongly disagree	2	6,7	8,0	8,0
	Disagree	3	10,0	12,0	20,0
	Neutral	7	23,3	28,0	48,0
	Agree	12	40,0	48,0	96,0
	Strongly agree	1	3,3	4,0	100,0
	Total	25	83,3	100,0	
Missing	System	5	16,7		
Total		30	100,0		

Motivation:

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		29	96,7	96,7	96,7
	Het assortiment van typen/modellen maatpakken (blue line) mag groter.	1	3,3	3,3	100,0
	Total	30	100,0	100,0	

Do you have a preference for one of the Suitsupply retailing channels?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	No, I prefer to shop both online and in the physical store	2	6,7	7,4	7,4
	No, I prefer to shop both on- and offline, and I regard shopping via mobile phone or tablet as a welcome addition	2	6,7	7,4	14,8
	Yes, I prefer to buy my clothes online	1	3,3	3,7	18,5

	Yes, I prefer to buy my clothes in a physical store	22	73,3	81,5	100,0
	Total	27	90,0	100,0	
Missing	System	3	10,0		
Total		30	100,0		

In the Suitsuppyl stores, I mis/would like ....

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid		21	70,0	70,0	70,0
	- niet van toepassing	1	3,3	3,3	73,3
	Dat ik in de winkel een 'advies op maat' krijg door goed ingemeten te worden en mijn voorkeuren (stijle.d.) worden bepaald. En dat ik dan vervolgens online suggesties krijg die bij me passen, incl accessoires. Als ik dan bestel worden pakken, broeken en sirts op maat gemaakt (broekspijpen op lengte, band innemen, lengte mouwen e.d.). Ik bestel nu alleen shirts online. Maar als bovenstaand idee mogelijk is zou ik ook pakken via de site bestellen.	1	3,3	3,3	76,7
	Een espressootje of glaasje whiskey bij het winkelen ;)	1	3,3	3,3	80,0
	Gehele online collectie fysiek in de winkel. Meer personeel	1	3,3	3,3	83,3
	Meer sfeer in de vorm van aankleding van de winkel. Sommige buitenlandse Suitsupply winkels hebben dit verder doorgetrokken.	1	3,3	3,3	86,7
	Smoking/ rok kostuum	1	3,3	3,3	90,0

	Sommige dingen zijn moeilijk te vinden in de winkel die wel al online staan. Ook bij navraag vaak in de winkel hebben ze nog nooit van de producten gehoord of weten ze wanneer het komt.. Er is dus een soort van gap soms tussen de offline en online winkel	1	3,3	3,3	93,3
	vaste klanten korting	1	3,3	3,3	96,7
	Vrouwelijke verkopers, die aan kunnen geven welke kleding sexy is	1	3,3	3,3	100,0
	Total	30	100,0	100,0	