

UNIVERSITY OF WALES TRINITY SAINT DAVID

MASTER OF BUSINESS ADMINISTRATION

DISSERTATION

**Clothing Retail: The Architecture of the Physical
Store within a Multi-Channel Retail Environment**

Barbara C Bottrill

4th December 2015

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This work has not previously been accepted in substance for any degree and is not being concurrently submitted in candidature for any degree.

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Bottrill, 4th December 2015, Barbara Carol

ABSTRACT

Purpose

The purpose of this study is to identify whether that, with the availability of other distribution channels, the physical store, (PS), in clothing retail is a valuable asset. The purpose of this study is also to identify those cornerstones that make up the architecture of the PS to help achieve competitive advantage and strategic growth.

Design/methodology/approach

A survey that comprised 78 responses and a focus group, (FG), comprising 8 participants was undertaken. Both these approaches used non-probability sample techniques to establish the population sample. Therefore, while the survey had a degree of validity, it cannot be used to make generalisations about the whole population, but, rather to offer recommendations for future research.

Findings

The results indicate that there is certainly a need for the PS channel. However, for a sustainable future, the PS channel can no longer operate effectively as a stand-alone entity but must function as part of a multi-channel retail environment. In addition, the role of this channel must change. These changes are not necessarily introducing new methods by which to trade; they also include utilising resources that already exist in the PS much more effectively.

Findings revealed that the customer experience (CE) is the central theme to the framework of the PS architecture. In this study, CE is applied to an adaptation of Brown's (1999) concept of pillars for strategic customer care. Three pillars emerged in the process of this research. These three pillars cover the CE in three areas: internal operations of the PS; the level of technology; and the environment within which the PS is positioned. They constitute the architecture of the PS. Within these pillars are the cornerstones. These cornerstones represent the changes that would help achieve competitive advantage and strategic growth for this channel. The cornerstones comprise of: staff; the senses ;a showroom strategy; displays; the fitting room experience ; technological innovations; the omni-channel experience; leveraging on e-tailing purchases; the town centre as a destination; diversity in the town centre.

Practical Implications

Results from the study provide a valuable source for areas of improvement, and recommendations for future research for those that work in the clothing industry, business generally and academics.

Originality/Value

There is little written that draws on all the cornerstones that constitute the architecture of the PS to help achieve competitive advantage and sustainable strategic growth. There has been recent increase of the new on-line channels by which to browse, purchase and communicate across. Consequently the future of the PS as a sustainable distribution channel is a popular topic. For this reason, in this study, literature has been sourced from a number of areas - not only peer reviewed academic journals, but also less reliable sources such as non-referred academic journals, professional and trade journals and news articles. All of these sources provide an enriched source of data across a varied range of disciplines. Also integrated into the study are specific strategic business tools. These include, an adaptation of Brown's (1999) pillars for strategic customer care, Porter's competitive forces, a SWOT analysis, a PESTLE analysis, and Porter's value chain.

Research Implications and Limitations

By providing a sample framework based on a non-probability sample, generalisations about the whole population cannot be made. Using one focus group and one survey has limited this research to identifying a number of issues which can be explored in further research.

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LIST OF ABBREVIATIONS & GLOSSARY OF TERMS

Architecture	'A blueprint of the enterprise that provides a common understanding of the organization and is used to align strategic objectives and tactical demands'. (Ulrich & Newcomb, 2010 p.4).
CE	Customer Experience
Clothing Retail	A business of selling clothing for individual use (Oxford English Dictionary, 2015).
FG	Focus Group
Multi-Channel	'The use of a variety of channels in a customer's shopping experience including research before a purchase.' (Dholakia <i>et al.</i> , 2005 p.63) and (McGoldrick & Collins 2007 p. 139).
PS	A term that refers to a physical location for businesses, such as an office, warehouse, or store front, where it conducts business face to face with its customers ^[A1] . (InvestorGuide.com, 2015).

1 INTRODUCTION

There are an increasing number of people who have adopted the internet as another method to research and purchase a clothing item and communicate with fellow buyers. This research explores whether there is a need for a physical store, (PS), channel, and will seek to identify the competitive strategies within this channel for a sustainable future.

1.1 The Research Rationale

There is much literature written on the different areas of retail; however, there is minimal material on the actual architecture that provides a consolidated perspective that identifies the cornerstones within the PS channel for competitive advantage and strategic growth.

With the emergence of new on-line shopping channels, the future of the PS as a competitive, sustainable, cost effective, and valuable channel is a popular topic. This is not just within the media, it is a topic that is also of interest to friends, family, ex-colleagues and the general public. A topic of such general interest will maintain momentum through the life of the study and beyond.

This is also a topic of personal interest to the author. The author worked for 14 years in the clothing industry in various high-profile positions within the supply chain. The main rationale for me choosing this research topic is to build on this previous experience and develop my academic portfolio.

1.2 A Statement of the Problem

There is much written on specific areas of the PS; however, there is minimal literature on the different cornerstones within one study that could be used to develop the architecture of the PS in clothing retail for competitive advantage and sustainable strategic growth in a comprehensive way.

This section will highlight the main problem, the hypercompetitive nature of this industry that a clothing retailer faces.

Clothing retail is a growth industry. Between the years 2013 to 2018 the projected growth for menswear is estimated at 16.3% and womenswear 22% (Marketline Advantage, 2014c; Marketline Advantage, 2014d). To obtain part of this projected growth a retailer must understand where to best invest their resources.

This is a market that is highly susceptible to unpredictability and rapid changes (Marketline Advantage, 2014d; Clothing stores - quarterly update, 2015; Molderez & Van Elst, 2015). The level of demand for clothing is created through personal income and fashion trends (Clothing stores - quarterly update, 2015) and is driven by the brand conscious, with brand

identification and lifestyle imagery key to successful trading (Clothing stores - quarterly update, 2015; Marketline Advantage, 2014c). As a result retailers invest heavily in creating a brand image through highly visible marketing campaigns (Marketline Advantage, 2014c).

Factors such as poor product differentiation increase the customer's buying power. This poor product differentiation enables the customer to switch between suppliers with ease (Marketline Advantage, 2014d). This also makes it even easier for new entrants to compete with existing players (Erasmus & Grabowski, 2013). However, each individual customer independently holds very little financial weight (Marketline Advantage, 2014c) thus weakening their buying power. This buying power is further weakened due to a customer's susceptibility to branding and advertising that can project a perception that the product is an essential item (Marketline Advantage, 2014c; Marketline Advantage, 2014d).

Substitutes are less of a challenge; there are no substitutes to clothing, but there are, however, alternatives in the form of bespoke tailoring, factory shops, second-hand, and homemade, these are a minimum threat (Marketline Advantage, 2014c). There is also a growing demand for garments that are from ethical sources (Goworek, 2011). This is a rapidly growing sector, estimated at a market value of 18 million in UK; a 79% rise from 2006 to 2007 (Co-operative Bank, 2003). Ethical sourcing in clothing manufacturing is related mainly to the social and environmental factors that is concerned with the level of pesticides used and the working conditions within an industry that is highly labour intensive. This rise in interest in ethical sourcing has largely derived from the negative publicity of such social and environmental factors, that have been received by brands such as Gap and Nike (Klein, 2000; Attalla & Carrigan, 2001; Iwanow *et al.*, 2005; Ellis & Higgins, 2006; Park & Lennon, 2006; Shaw *et al.*, 2006).

The big threat within this industry is in the counterfeit of clothing items, particularly those from well sought after high end brands (Marketline Advantage, 2014c; Investment Weekly News, 2012; Gabrielli *et al.*, 2012). Counterfeit items are forgeries that take advantage of a brand's true value, and assist in accelerating brand overexposure in an already saturated market place, thus compromising the true value of luxury (Doss & Robinson, 2013). Instead of an item to aspire to, a counterfeit product changes the perception of the value of a luxury item from an investment or acquisition, to an item that is obtainable and disposable (Doss & Robinson, 2013). In addition, the quality and service could be compromised, thus affecting the brand equity as counterfeit items are brought to market with a very different customer experience and service from that of the true branded retailer (Doss & Robinson, 2013).

A critical success factor for a retailer, particularly in the high end fashion market, is the mechanics behind bringing the product to market through effective and efficient supply chain

management (SCM) practices (Caniato *et al.*, 2013). Marketing Information Systems, (MIS), is a system that uses technology in the decision making process, providing reliable immediate information that enables a speedier and flexible approach to market demands (De Queiroz & Oliveira, 2014). Zara, a well-known high-street brand, is known as the leader in using the supply chain as its competitive strategy (Foroohar & Stabe, 2005). Zara provide the market with fast fashion, using an approach where there is a lean supply for standard products and agile for the technically innovative items (Christopher, 2000). This is known as a leagile approach (Naylor *et al.*, 1999; Bruce *et al.*, 2004).

Clothing retail is fiercely competitive (Thomson, 2012; Molderez & Van Elst, 2015) with rivalry high (Marketline Advantage, 2014d). The main macro environmental factor threatening the PS is technological and the emergence of the internet that has provided on-line shopping and new communication channels. The emergence of the internet offers not just another method of distribution in the channel mix but a new method to communicate on a B2B, B2C, and C2C level. The emphasis in successful trading according to PR Newswire (2012) is on product content, and the creation and delivery of relevant, timely and personal information (Berman, 2012). Content is used to bring emotion, dialogue and relevance to the brand customer relationship and contribute to the brand's overall narrative to provide value for the customer (Dupre, 2014). B2C relations are developed through effective use of films and storylines that could create that emotion (Dupre, 2014). Websites are also integrated into a retailer's business model offering updated news, lifestyle and style tips (Vizard, 2014).

People are influenced by who wears and even touches a product (Argo *et al.*, 2008). Fashion retailers use dignitaries and celebrities to promote a product (Friedman, 2009; Stakeholder, 2010a; Berman, 2012). These are referred to as 'opinion leaders' (Weisfeld-Spolter & Thakker, 2011). According to Weisfeld-Spolter & Thakker (2011), fashion retailers use celebrities as the 'opinion leaders' to push their product out to the mass market. Opinion leaders are viewed as knowledgeable in certain areas (Cosmos, 1980).

The term 'Opinion leaders' is defined by Cosmos (1980 p.136) as:

'Individuals who are knowledgeable about various topics and whose advice is taken seriously by others'. Opinion leaders tend to be:

'very socially active and highly interconnected within the community' (Darley, 1993 p.136).

The significance of these opinion leaders to a marketer is that they are key members in society and can create interest within the mass market for a new product (Weisfeld-Spolter &

Thakker, 2011). They are the fashion innovators of a new style (Weisfeld-Spolter & Thakker, 2011).

Organisations must be aware of the developments that shape customer perception and in turn create demand (Marketline Advantage, 2014c). Clothing retailers are continuously looking for alternative ways to implement new technologies to integrate into their business model that will allow them to engage with the customer in different ways and remain customer focused (Chain Store Age, 2014). An example of this is through using another type of opinion leader, the fashion-savvy blogger (Zanette *et al.*, 2013). Retailers also use the fashion-savvy blogger to create interest and promote their brand. A blogger can be one or a number of individuals who post opinions on the social media (Zanette *et al.*, 2013). Using a blogger to create interest and promote their brand (Friedman, 2009; Chain Store Age, 2014) is a relatively new concept to the marketing mix (Mangold & Smith, 2012). People tend to follow a blog based on the blogger's traits. A fashion blogger creates a community of those interested in a certain style. This is a virtual area that provides assistance, advice and inspiration among the readership with the potential to reach a global audience (Pihl, 2014). A fashion blogger is a person who consumes the product in normal conditions and therefore provides recommendations that should be valid (Pihl, 2014). There are 58 million unique users on Googles blog platform in the US (Fournier & Lee, 2009). This, according to Zanette *et al.* (2013), is why it is no surprise why a retailer would want to use this line of communication to reach a market. There is however recent scepticism on the mechanics behind such schemes.

The customer has a voice and in turn more influence on the success of the brand than ever before through the various social networking channels and affiliated on-line communities. A popular example is mums.net (De Kare-Silver, 2011). This is one example of an on-line community that many retailers review to provide insights into what the customer wants (De Kare-Silver, 2011). There is also Pinterest, Facebook, Twitter and loyalty based apps that reflect what is popular (Clothing stores - quarterly update, 2015). According to PR Newswire (2012) and De Kare-Silver (2011) this is the future success of a retailer. A clothing product is increasingly becoming a buyer-driven commodity (Abecassis-Moedas, 2006).

Retail has been severely impacted by new digital innovations (Tseng-Lung & Feng, 2014). As already stated in this section, this industry is vulnerable to new entrants. As stated by Tseng-Lung & Feng (2014) retail has been severely impacted by new digital innovations. Technology has provided the internet, and the means by which new entrants such as sole on-line traders ASOS and Net-A-Porter in 2000 could enter an already saturated market. Sole on-line retailers have arguably used technology as a means to enter this market and

gain market share by reaching the remote customer. ASOS is a prime example of using social networking channels to engage with the customer. ASOS has developed in 2009 their own social networking channel, ASOS Life (Marketline Advantage, 2014a).

Technology has enabled the customer to integrate within an organisation's activities (Stakeholder, 2010b) driving the clothing retail business environment away from creating a customer experience that was simply selling, towards an environment where an organisation must find and involve the customer (Berman, 2012). According to Sujata *et al.*, (2014) involving the customer is used by organisations as a means to differentiate from their competitors. In 2011 ASOS introduced a new channel called ASOS Fashion Finder that allowed the customer to showcase their favourite items (Marketline Advantage, 2014a). ASOS also launched ASOS Marketplace, a channel allowing new designers to trade through ASOS and leverage on their existing customer base at the same time as injecting newness into their core ranges (Marketline Advantage, 2014a; PR Newswire, 2011).

These new on-line retailers offer the customer a new experience in the purchasing journey, questioning the future of the PS as a competitive and sustainable channel.

1.3 The Purpose of the Study

The purpose of this research is not about making generalisations about the population but to review what is out there and provide both an insight and recommendations for further research.

This research is both quantitative and qualitative, within a sample framework that uses a non-probability sample technique for both methods. A non-probability sample technique is not widely used in quantitative research. However, for the purposes of this research it has been adopted to enable access to a large population sample in the quickest and most economical fashion. The author is aware that this makes the research less reliable.

The significance of this research is to provide guidelines for improvements and provide recommendations for future research for those who work in the clothing industry, business generally and academics.

1.4 The Research Aims & Objectives

The overall aim of the research is to identify whether, that with the availability of other distribution channels, the PS in clothing retail is a valuable asset.

The objectives of the research are to:

- 1 Conduct and evaluate secondary research which will:
 - 1.1 Evaluate the PS position in the current retail climate,
 - 1.2 Appraise the PS to identify the cornerstones within this channel which will help sustain competitive advantage and strategic growth,
- 2 Conduct and evaluate primary research to analyse the cornerstones within the PS architecture to help sustain competitive advantage and strategic growth,
.
- 3 Draw conclusions from research findings in order to:
 - 3.1 Recommend the application of the cornerstones identified in the PS architecture to achieve competitive advantage and sustainable strategic growth,
 - 3.2 Recommend future research.

1.5 The Research Design

The research is both descriptive and exploratory. This research adopted grounded theory and a survey as the research strategies and was administered through one questionnaire and one focus group, (FG), meeting over a cross-sectional time horizon. A cross-sectional time horizon is data that is collected from certain types of people to provide an insight into current thinking at a point in time (Saunders & Lewis, 2012). A survey strategy normally applies a probability sample where the population is known and consequently statistical inferences and generalisations about the population can be made. However, for this research, a snowball sampling technique was used for the survey. A snowball sampling technique is a type of convenience sample that uses a non-probability sampling method where the individuals in the population are not given an equal chance of being selected (Saunders *et al.*, 2009)

This results in a study where statistical conclusions cannot be drawn about the population (Saunders *et al.*, 2009). The results are therefore less reliable than if a probability sample was applied to the research design.

The sample sizes for each of the data collection techniques were as follows:

- Pilot survey: 10 respondents
- Go-live survey: 78 respondents.
- FG: 8 participants

Together, the survey and the FG participant ages ranged from 18 to 68. The survey was designed and developed on a software package called Survey Monkey, and an analysis of the data was undertaken using SPSS and Excel. As is implied above, a pilot survey was introduced to check the design, flow, clarity of the survey, and the reliability and the validity of the data collected. The participants for the pilot survey and the FG were selected using a purposive sample technique with the application of a homogeneous sampling strategy. This population was selected based on the judgement of the researcher to select the participants who would best fit the criteria to fulfil the research aims and objectives of the research and to pilot the survey (Neuman, 2000).

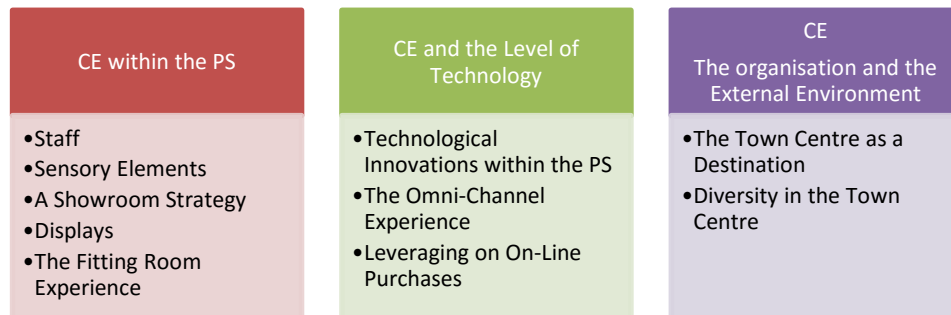
1.6 The Theoretical Framework

The theoretical framework for this research was comprised of a number of business tools. These business tools are Porter's Competitive Forces, a PESTLE analysis, Brown's (1999) concept of pillars for strategic customer care, a SWOT Analysis and Porter's value chain.

The PESTLE and SWOT analysis, and Brown's (1999) pillars shaped the architecture of the PS within this research. An analysis of the macro-environmental factors through a PESTLE analysis helped to identify technological factors as the main macro-environmental factor that has shaped this industry. Brown's (1999) evolutionary approach to increasing customer value and profitability provided the structure through his use of pillars. The cornerstones that reside within the pillars are the areas for change and development. These cornerstones were identified through a SWOT analysis.

Figure 1, on the following page, provides a diagram of the architecture that show the pillars and the cornerstones in each of them.

Figure 1. The three pillars within the physical store architecture and their cornerstones



The final business tool was Porter's value chain, a basic business tool for competitive advantage. This is a tool that links activities in the organisation's value chain to create a number of discrete value activities that can be used to differentiate the organisation's product from the competitors. Porter's value chain is reviewed in chapter 2 and is applied mainly in the recommendations of this study, Chapter 6.

1.7 Assumptions, Limitations and Scope

Assumptions are made that the participants in the FG and the respondents of the survey have answered truthfully.

The absence of financial resources, and therefore the opportunity to offer any kind of incentive, resulted in bias in terms of a disproportionate representation across gender and age range. The researcher was reliant on the goodwill of friends, family, ex-colleagues and the general public to answer the questionnaire and attend the FG meeting. Both approaches were reliant on the availability of these people. A full review of the limitations is provided in section 3.13.

The scope of this research encompasses a very small sample across both the FG and survey with fewer than 100 participants/ respondents. With such a small sample size this research is to be interpreted as a general approach to the architecture of the PS within a multi-channel enterprise in the context of clothing retail. It can then be used as a platform from which to provide an insight into recommended further research and the possibilities for competitive advantage and sustainable strategic growth.

2 LITERATURE REVIEW

2.1 Introduction to the Literature

This chapter will review the literature in relation to the research aim and objectives as set out in chapter 1, section 1.5.

The overall aim of the research is to identify whether, that with the availability of other distribution channels the physical store, (PS), in clothing retail is a valuable asset. The objectives of this chapter are to review other research made to evaluate the PS position in the current retail climate, and to appraise the PS in order to identify the cornerstones within this channel which will help sustain competitive advantage and strategic growth.

In the context of clothing retail, references related to this subject area were not easy to find. For this reason literature from other retail sectors is included. Whilst peer reviewed academic journals were used, less reliable sources were also included, namely, professional and trade journals and news articles. However, caution was exercised as there is the potential for these sources to contain bias (Saunders *et al.*, 2009). Whilst newspapers are a source that have the potential to have the highest level of bias, they are, according to Saunders & Lewis (2012) a good source for analysing the current environment and are therefore included in this research.

There is much written on the subject of retail across a wide variety of contexts; however, there was not one piece of work that focused on the architecture of the PS that encompassed all the different areas that have had an effect on the PS channel's past, current and future competitiveness and strategic growth. For this reason the literature review will focus on certain areas in the literature that were found to be relevant in developing the PS architecture. These areas include a SWOT analysis: 'The Threats and Weaknesses and the Demise of the PS', and 'The Strengths and Opportunities within the PS'. The last two sections of the literature review focus on the architecture of the PS and the wider network, the area within which the PS is positioned.

The following points will be discussed in the following sections, however, it is important to introduce them here. The importance of providing a good CE stood out in the literature as a competitive strategy. CE is therefore the overarching theme to the PS architecture. The other part of the structure that emerged from the literature is the concept of Brown's (1999) pillars for strategic customer care. For this reason three pillars are applied to the architecture that cover those areas that affect the PS the most: internal operations; technology; and the outside area within which the PS trades. With CE as the central theme

this defines the 3 pillars within the PS architecture as: 'CE within the PS', CE and the level of technology', and 'CE-The organisation and the external environment'.

Within these pillars reside a number of cornerstones. These cornerstones are the areas for competitive advantage and sustainable strategic growth, each of which influence the CE. These cornerstones cover the areas of: staff; the senses ;a showroom strategy; displays; the fitting room experience ; technological innovations; the omni-channel experience; leveraging on e-tailing purchases; the town centre as a destination; diversity in the town centre.

The overarching theme, CE, the three pillars, and their corresponding cornerstones all develop the architecture of the PS to help sustain competitive advantage and strategic growth. This architecture is shown in Figure 1 in section 1.7.

2.2 Threats, Weaknesses, and the Demise of the Physical Store

The fundamental threats to the PS are technological factors and the emergence of new digital developments in retail.

The start of the 21st century has witnessed a dramatic shift in the PS architecture (Ogben-Barnes & Barclay, 2012; Thomson, 2012): new technological innovations have introduced the internet and broadband and added a new channel to the channel mix: the on-line shopping channel. Clothing has become one of the top sellers in internet sales, and a major distribution channel in busy retail periods such as the lead up to Christmas (Clothing stores - quarterly update, 2015; Felsted & Robinson, 2014). Amazon, an on-line retailer, states that clothing is one of their top three categories (The Economic Times (Online), 2015). This new channel has offered the customer further choice in how and where they would like to shop (Marks and Spencer, 2012). According to Thomson (2012) and Marketing Weekly News (2014) the customer no longer has to visit a PS to purchase clothing; they have a new method to browse, purchase and receive their clothing product. This new on-line channel has questioned the true value of the PS as a sustainable and competitive distribution channel (De Kare-Silver, 2011; Cuthbertson *et al.*, 2012; Ogben-Barnes & Barclay, 2012; Minsker, 2014).

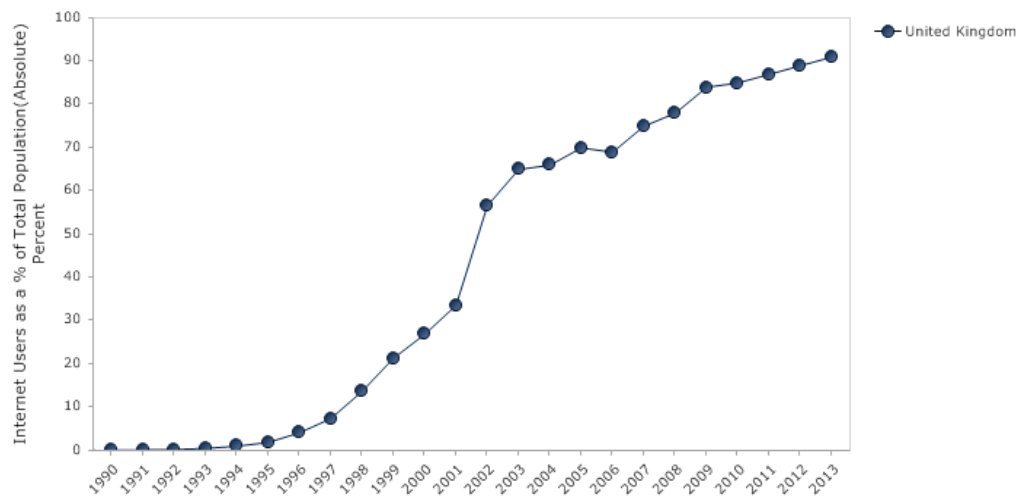
However, the on-line channel was not initially viewed as a threat; the rise of internet use in the clothing sector was initially slow (De Kare-Silver, 2011). The traditional retailer was of the opinion that clothing could not be sold on-line due to the nature of the product (De Kare-Silver, 2011). This late adoption of the internet by the traditional clothing retailer could be attributed to the importance of being able to see and feel the garment in a PS environment to obtain a sale (Newbery & ter Meulen, 2010; DeakinPrime, 2011). If there was to be any success in using the on-line channel, this would be from an already well-known brand with a

PS presence (Newbery & ter Meulen, 2010; DeakinPrime, 2011). These are the brands that have an established portfolio of trust and experience amongst their existing customers (Newbery & ter Meulen, 2010; DeakinPrime, 2011; Cuthbertson *et al.*, 2012).

The threat to the PS arguably emerged when on-line traders began to address their initial weaknesses (Genecon LLP & Partners, 2011). These weaknesses included poor logistics, and the perception of the on-line channel as a budget option (Newbery & ter Meulen, 2010). On-line traders such as ASOS initiated speedier and more cost effective delivery and return options (Newbery & ter Meulen, 2010; Deloitte, 2011). Other retailers such as Coast, Warehouse, and Karen Millan recruited local couriers to collect from stores and deliver (Twentyman, 2012). Sole on-line retailers such as Net-a-Porter separated their on-line environment into two areas: an on-line outlet store for the sale of discounted previous season stock, and another on-line site for the sale of full priced new season stock (Newbery & ter Meulen, 2010; Marketline Advantage, 2014a). This changed the perception of the on-line market as a budget option (Newbery & ter Meulen, 2010; Marketline Advantage, 2014a). A more recent concept is the implementation of a virtual fitting room involving avatars that simulate what the garment will look like on the customer through digitised means (Greene, 2011). This offers the customer a more realistic view of what the garment will look like on the actual customer.

The other threat is the ever increasing willingness to shop on-line (Newbery & ter Meulen, 2010; Piotrowicz, 2012). Figure 2 shows the rise in internet users as a percentage of the total population from 1990 to 2013 (Marketline Advantage, 2015).

Figure 2. The rise in internet users as a % of the total population from 1990 to 2013



(Marketline Advantage, 2015)

The increased use of internet shopping could be attributed to a continuous stream of new digital innovations, which not only offers a differentiated customer experience for competitive advantage, but, also provides the remote customer access to a wider product range and more retailers on a global scale. There is also the emergence of a new generation of digital natives who trust technology and have less of a concern on issues surrounding integrity (Piotrowicz, 2012).

The introduction of the broadband has enabled the retailer to make product information richer and smarter due to more rapid download speeds (Thomson, 2012). The on-line channel, in the mass market, is expected as part of a retailer's distribution mix (Newbery & ter Meulen, 2010). This has put a strain on financial resources, particularly for the traditional retailer who has the existing hefty operational costs of the PS as well as the added considerations of significant capital investments in internet related communications and retail (Deloitte, 2011; Ogden & Ogden, 2005).

The early perception of the on-line channel as unsuitable by the traditional retailer has arguably resulted in the PS channel losing out on utilising the internet as an opportunity for strategic growth (Newbery & ter Meulen, 2010). They did not use their economies of scale to invest in new digital innovations. Such an investment may have had the potential to raise the barrier to entry hence reducing the opportunity for new entrants, such as ASOS, and Net-A-Porter in 2000, to gain market share. Instead retailers leveraged heavily in the commercial

property market during the boom periods of the 1990s, leaving high debts (Gounder, 2012). Peacocks, a low cost high street retailer, is a prime example of such a strategy (Gounder, 2012). For the on-line retailer, there was less of a financial outlay, and through gaining market share they could invest in new and fresh strategies to differentiate themselves through digital content (Genecon LLP & Partners, 2011).

With the wide-spread use of the internet, the future of the PS was further threatened with fewer people who needed to visit the town centre. People can work, shop, socialise, be entertained and educated from the home (Genecon LLP & Partners, 2011; Portas, 2011). This among other factors drove footfall away from the town centre and resulted in a significant amount of vacant retail units (Clothing stores - quarterly update, 2015). Footfall can be measured by those passing through and those who choose the town centre as a destination (Genecon LLP & Partners, 2011). With less human traffic through a town centre there is the danger of these vacant retail units being utilised as affordable housing and therefore changing the town centre into a residential area (The Times, 2012).

Town centre's lack strategic planning. These are areas that have evolved from markets, and through time, shops have popped up with no thought behind the retail mix (Genecon LLP & Partners, 2011). This creates a fragmented approach to town management where there is no consideration towards the USP, (unique selling point), or branding, that is in tune with the localised area (De Kare-Silver, 2011; Genecon LLP & Partners, 2011; Portas, 2011). This results in a lacklustre, anonymous and soulless town centre (De Kare-Silver, 2011; Genecon LLP & Partners, 2011; Portas, 2011).

Footfall in town centres has also been reduced as a result of certain growth strategies implemented by the food industry. The supermarket giants detected a gap in the market to supply cheap clothing to the busy price conscious customer (Thomson, 2012; Marketline Advantage, 2014d). The last 20 years have witnessed supermarkets entering the non-food sector, mixing clothing amongst the necessary grocery items to create a one-stop solution (Genecon LLP & Partners, 2011; Preston, 2012; Clothing stores - quarterly update, 2015). Stockopedia (2011) state that the supermarket giant Sainsbury's is the 7th largest clothing retailer in terms of volume. Services like dentists, beauty and hair, the post office, opticians and dry cleaners are strategically positioned in supermarkets, creating further footfall for the supermarket giants (Deloitte 2011; Portas 2011). Arguably, this is simulating the idea of a town centre under one roof (Genecon LLP & Partners, 2011).

The internet has provided the opportunity for strategic growth through the ability to reach the remote customer (Thomson, 2012; Chapman, 2015) and those that do not like the experience of shopping in a PS (Financial Express, 2012). This is strategic growth that is not

achievable through a stand-alone PS channel. In addition, the on-line channel provides product content to the customer fast. This is in comparison to the PS that could be described as static, with the implementation of change at a much slower, costly and laborious pace.

The on-line channel has offered the customer a new way to shop and the retailer a new way to trade. The success of ASOS and Net-A-Porter has proved that the on-line environment is competitive (Thomson, 2012; Felsted & Robinson, 2014) not just for the sale of a clothing product but also for engaging with the customer. Customer expectations are always changing; an experience in one channel raises expectations in another (Berman, 2012). These on-line retailers have provided the customer with a different experience and therefore are arguably the drivers of a new business model (Berman, 2012).

2.3 The Strengths and Opportunities within the Physical Store

The main strength the PS has that differentiates this channel from any other is the sensory elements, particularly those of sight and touch (Davies et al., 2003; DeakinPrime, 2011; Deloitte, 2011). DeakinPrime (2011) and Ogben-Barnes & Barclay (2012) suggest leveraging on the senses and creating a sensory store; a store that could compete on the senses as opposed to price. This could lift sales in a PS by 5.4% (DeakinPrime, 2011).

According to Soars (2009, p. 286-298):

‘Our sense of sound, sight, smell, and touch have a powerful effect on us, ... sensory stimuli can influence environments, improve the shopper experience’.

Fashion shopping is considered to be complex (Mitchell, 1999) where an item of clothing is selected not on the functionalities of the product type but rather on self-image (Kaiser, 1990; De Nora & Belcher, 2005). Fashion retailers seek innovations that will lengthen the dwell time and increase the frequency of shopping visits (Daniel et al., 2012). According to Daniel et al., (2012), it is not just the tangible aspects that affect the customer; it is also smell, touch, and owner-presence that has an influence. The principle of experiential marketing is particularly relevant to the fashion sector (Daniel et al., 2012). Experiential marketing is engaging with the customers through providing an experience that will empower the customer to connect, not just physically, but emotionally to the product (Chandrasekar et al., 2012). Abercrombie & Fitch is an example of a retailer that utilises all five senses within their stores to differentiate its brand and provide a unique experience through the use of spotlights, model-like sales assistants, music to create energy, and their branded fragrance permeating the air (Daniel et al., 2012). This is one example of fashion retailers using

experiential marketing to provide a differentiated in-store experience (Daniel et al., 2012). in a market where there is confusion as to which clothing retailer to frequent based on such similar product offerings (Otieno et al., 2005).

The PS provides the right environment and therefore has the opportunity to make effective use of the senses. These sensory elements that this channel has to offer are one of the reasons for a slow take-up of internet use for shopping. Effective use of the senses can: create 'shopping arousal'; immerse the customer in the brand; influence the shoppers' experience; and change the customers' behaviour (Soars, 2009; DeakinPrime, 2011; Ogben-Barnes & Barclay, 2012). However, retailers must be creative in how they utilise these senses for competitive advantage (DeakinPrime, 2011). One of the senses of particular relevance to clothing is sound and the influence of music (Ogben-Barnes & Barclay, 2012). According to De Nora & Belcher (2005) younger women view shopping as a leisure-time activity, and are particularly influenced by the senses, especially sound and the choice of music. While the older generation tend to perceive shopping as more utilitarian (De Nora & Belcher, 2005).

Several authors share the opinion that, with the internet offering product knowledge, retail requires less human intervention and minimal skill (Stakeholder, 2010a; Deloitte, 2011; Portas, 2011; Marketing Weekly News, 2014). However, Wellington (2010) and Investment Weekly News (2012) argue that, with products becoming less distinguishable, the only way a business can differentiate itself from competitors is through the customer service it provides. Chapman, (2015) suggest the risk of returns could be reduced by having personal stylists in the PS to assist the customer. Some retailers competing in the mid-market offer such a service (Clothing stores - quarterly update, 2015). In the luxury brand market, uniqueness is achieved through developing a relationship with their customer for sustainable growth (Investment Weekly News, 2012). This is where staff have their own established clientele (Clothing stores - quarterly update, 2015). The luxury high end market is where there is less emphasis on differentiation through the creation of a brand identity and the provision of a high status brand name, and more on the creation of emotional value to achieve closeness and association (Bain & Co, 2005). This is arguably creating customer emotional attachment for sustainable loyalty (Cailleux et al., 2009).

Cuthbertson et al. (2012) state that people are a major resource in an organisation and therefore can offer innovation in different ways. Barrow & Mosley (2005) take the same view and suggest that leading organisations must understand that it is just as important to create a positive brand image for the employees as much as it is for the customers.

As Belasco & Stayer (1994, p. 48) state:

'The principle tools of production today are not machinery and equipment. Neither is it solely the brainpower of the managerial leadership. Rather, the tools of production are the ideas and talents (the intellectual capital) of the scientist, the operator and the programmer.'

Staff can also portray a certain image. Appearance according to Kaiser (1990) and Otieno *et al.*, (2005) is strongly involved with females' self-image and self-concept. While there is not close interaction in clothing retail, in comparison to other sales contexts, customers have strong links with association to the tangible aspects of areas such as presentation. This includes staff appearance (De Klerk *et al.*, 1998). This offers the PS channel the opportunity to leverage on staff uniform.

Baker (2013) suggest the demise of the PS has been exaggerated (Baker, 2013). Statistics from Marketline Advantage (2014b), reveal that 90% to 91% of clothing sales for 2014 are attributed to the PS channel in the UK. In addition, a study carried out in the US showed that 68% of 18-24 year olds prefer to go to a PS for clothes and shoes (Baker, 2013). Even with the growth in the on-line channel there are those retailers who are committed to expanding their PS presence (Lockhart, 2012; Baker, 2013). The PS is further strengthened through the lack of community and a feeling of isolation which the on-line environment creates (Poulter, 2015). According to Poulter (2015) small shops provide an element of social cohesion. Sole on-line traders are realising the benefits of having a PS presence and are using the PS channel as an opportunity to show-off new products (Fildes & Frean, 2012). Lockhart (2012) did not have any examples, however, did state that the majority of the top 20 most visited retail websites all have a PS presence.

According to the Centre for Retail Research (2015), there is a need for a PS presence. However, with an increase in on-line spending, the changing patterns in how the customer shops, the pressure of high costs, and the customers' reluctance to spend, the role of the PS will have to change (Centre for Retail Research, 2015). Shopping has become a leisure-time activity (Terblanche & Boshoff, 2006; House of Commons, 2015). The role of the PS is about engaging with the customer and delivering an experience, as opposed to creating a sale through short lived promotions (Ogden & Ogden, 2005; Ogben-Barnes & Barclay, 2012), and understanding that the purpose of the PS is not necessarily to obtain a sale, but rather to enhance brand awareness (Deloitte, 2011; Spenner & Freeman, 2012). According to Barrett (2011) and Deloitte (2011) fewer products and more of a showroom effect is what the customer wants.

According to Genecon LLP & Partners (2011) retailers with PS presence must invest in larger retail premises in key logistical positions. Retailers such as Adidas have developed a brand centre in Beijing, where there are services like a juice bar, an urban area for events, and a basketball court on the rooftop (Djurovic, 2009). These are activities that create points of customer engagement through their relevance to the product type.

2.4 The Architecture of the Physical Store

Based on the opinions of authors such as Brown (1999) and Wellington (2010), who suggest that there is only one boss and that is the customer, the customer is central to the architecture of the PS. Obviously without the customer the organisation will not survive.

For a clothing retailer to improve on their service they must first understand their customer's expectations (Erasmus & Grabowski, 2013). While Piotrowicz (2012) suggests that a retail experience must provide both a utilitarian and hedonic experience. According to Daniel *et al.* (2012) and Park *et al.* (2006) shopping for fashion is less task-orientated and more hedonic where the experience has become more important than the product. Therefore, in addition to the customer, the shopping experience is also central to the PS architecture.

Superior CE is central to customer satisfaction, loyalty, and in turn an organisation's profitability (Kumar *et al.*, 2013). According to Lewison (1997) a retailer must offer excellent service for the customer to keep returning. Research conducted by Erasmus & Grabowski (2013) on 20 year-old-plus females revealed that expectations of the service from clothing is high and therefore retailers have no choice but to compete and differentiate by exceeding these expectations in the service they provide. Braff & Devine (2009) suggest that assumptions about what the customer wants are generally wrong and suggest an organisation should understand the customer's break points in relation to sensitivity to a change in the service an organisation offers (Braff & Devine, 2009). Braff & Devine (2009) state that for those that review their customer service levels carefully, find that they can position their resources in the right area that is effective for both the organisation's costs, at the same time as offering a service that is acceptable and/or exceeds the customer's expectations. An example of this is waiting times, and understanding what is an acceptable period of time for a customer to wait without overstaffing at a considerable increase in labour costs to the retailer (Braff & Devine, 2009).

Technology has assisted in shifting the buying power from the retailer to the buyer (Sunday Business Post, 2015). Technological factors, and the dawn of the internet, has enabled the customer to spread news fast amongst peers when they have been happy with a product and/or service (Wellington, 2010). The customer is in the driving seat more than ever.

An adaptation of Brown's (1999) concept of pillars for strategic customer care is used throughout this architecture. While the date of this literature may appear outdated, the use of this literature is relevant to the current retail climate. Brown's (1999) use of pillars positions the customer central to help achieve a differentiated service. Brown (1999) suggests an evolutionary approach to increasing customer value and an organisation's profitability through the application of pillars. Brown (1999) suggests that these pillars must grow and develop equally for customer care to succeed.

The pillars in this research represent, the operations within a PS, technology, and the area in which the PS is positioned, with CE central to all of these areas. This creates a total of three pillars: 'CE within the PS', 'CE and the level of technology', and 'CE-The organisation and the external environment'. These can be viewed in Figure 1 in section 1.7. Brown (1999) suggests that customer care will fail if all three pillars are not level. Such an imbalance can occur when an organisation invests in technology that far outreaches the organisation's capabilities and current needs (Brown 1999). Alternatively, there can be examples when an organisation does not invest enough. A case in point is of the traditional retailer who had, by the turn of the century, invested heavily in their property portfolios to increase their PS presence as a means to engage with the customer. This particular example resulted in fewer resources available to offer the customer a shopping experience through digital means. In this example the pillar that represents the CE and the level of technology in the traditional PS model is less developed than the others, resulting in poor customer care.

According to Thomson (2012), successful sole on-line traders such as ASOS and Net-A-Porter have been instrumental in reshaping retail and changing customer expectations. These new entrants were able to detect a niche in an already heavily saturated marketplace. They were arguably aware of the technological environmental factors in clothing retail and invested in the pillar that represents the 'CE and level of technology'. These on-line retailers made effective use of the new digital technologies available to build a brand through a channel that was initially deemed unsuitable for this product type, and created a new shopping experience for the customer through digital means. Investment in the other two pillars that represent operations within the PS and the External Environment were not applicable to this particular business strategy. What was prevalent for these sole on-line traders at that time was the development of the technology pillar as a new method to engage with the customer as part of a differentiation strategy.

According to Berman (2012) an experience in one channel raises the expectations in another. He suggests the traditional retailer must revisit their customer value propositions in line with technological innovations (Berman, 2012). If an organisation does not, it could be

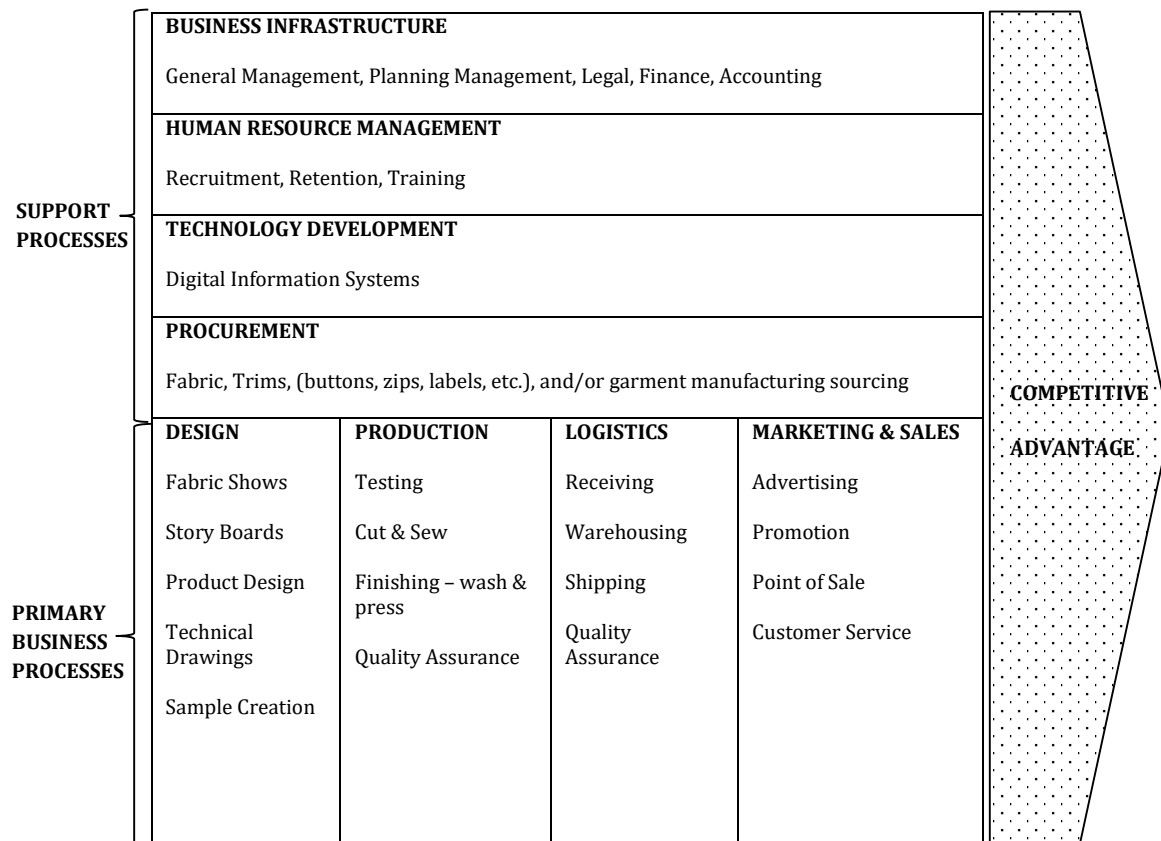
suggested that this could result in the technology pillar to be significantly lower than the other two pillars, again resulting in customer care that is poor.

As well as Brown's (1999) concept of pillars, another business tool that can be applied to the PS architecture is Porter's value chain for competitive advantage (Porter, 2004). According to Berman (2012) an organisation should use the value chain to determine the points of customer engagement to reshape their customer value propositions, and transform their operations using the digital resources available for greater customer interaction and collaboration. Porter (2004) suggests that value instead of cost must be used in analysing an organisation's competitive position. In competitive terms, value is the amount the customer is prepared to pay for the product and/or the service the organisation is going to provide (Porter, 2004). When an organisation performs better or cheaper than a competitor, competitive advantage is achieved (Porter, 2004). Profit is created when the value exceeds the cost of producing the product and/or service (Porter, 2004).

The value chain is made up of many activities; each activity is a building block used in order to create a product that is of value to the customer (Porter, 2004). These activities are not independent but a system of interdependent activities (Porter, 2004). When linkages and trade-offs are made between these activities, a discrete value activity is created (Porter, 2004). Competitive advantage is achieved when the behaviour of these discrete value activities creates value for the customer that exceeds the cost (Porter, 2004).

Figure 3 is an adaptation from Porter's (1985) generic value chain. This shows a simplified value chain of the activities in the clothing industry in the post fabric creation stages.

Figure 3. An adaptation of Porter's generic value chain for the clothing industry



According to Piotrowicz (2012) the whole of the value chain must be considered in retail. The PS is a sales primary activity at the end of the value chain (House of Commons, 2015). If the PS is analysed in isolation this may give a distorted view of its true value. Even if the sale does not occur in a PS, measuring the revenue created from only a PS could potentially lead to underestimating the true value of an asset that is generally deemed costly.

The integration of the design and retail activity is one example of the use of Porter's value chain in clothing retail. Abecassis-Moedas (2006) suggests that instead of the traditional upstream focus of design first and then sell, alternatively involve the customer in the design stage and create a downstream movement through the value chain for competitive advantage. Involving the customer in the design activity creates the opportunity to provide a product that the customer will want to purchase.

Another example is to create a link between technology and the PS activity. This will provide a consolidated approach to both channels and connect the in-store experience with omni-

channel capabilities (Marketing Weekly News, 2014). While the traditional retailer attempted to introduce an on-line channel in their business model as an add-on and not an integral part of the business (Gounder, 2012). A number of authors have emphasised the importance of implementing the same strategic planning across all channels (Ogden & Ogden, 2005; Newbery & ter Meulen, 2010; De Kare-Silver, 2011; Piotrowicz, 2012; Marketing Weekly News, 2014; Sunday Business Post, 2015). This is a strategy that not only integrates the digital with physical but one that will provide a seamless solution that offers brand continuity across all channels (Ogden & Ogden, 2005; Newbery & ter Meulen, 2010; De Kare-Silver, 2011; Piotrowicz, 2012; Marketing Weekly News, 2014; Sunday Business Post, 2015). According to Piotrowicz (2012) both channels are often competing, sometimes within the same organisation. However, a number of authors suggests that each channel can complement and benefit from the other, rather than compete (Houliez, 2010; Barrett, 2011; DeakinPrime, 2011; Deloitte, 2011; Berman, 2012; Cao *et al.*, 2012; Ogben-Barnes & Barclay, 2012). The PS role is evolving to include additional services such as post-sales support and is becoming a central hub for collecting goods that are ordered on-line (Piotrowicz, 2012).

The use of technology in retail is not just limited to the introduction of the on-line channel, there are further opportunities to utilise other technologies to enhance the customer experience within a PS: video walls; digitised mirrors; kiosks; instore Ipads; Wi-Fi access; real-time vouchers to smartphones; digitised walls, (the endless shelf); mobile payment; and music loaded onto RFID tags (Deloitte, 2011; Baker, 2012; Berman, 2012; Marks and Spencer, 2012; Thomson 2012; Retail Week, 2012; Hathaway, 2014; Minsker, 2014; Clothing stores-quarterly update, 2015). This is an area that connects two of the pillars in the architecture: 'CE within the PS' and 'CE and the level of technology'. According to Piotrowicz (2012) the integrated customer experience across channels is provided through smartphones. Piotrowicz (2012) suggests mobile devices in store is a rapid growth area and that both the customer and staff expect all technologies to interact.

Using the digital resources available in the PS enables the retailer to provide a continual stream of fresh clothing that is relevant to the current climate (Newbery & ter Meulen, 2010; Stakeholder, 2010a; De Kare-Silver, 2011; Harkin, 2011; Marks and Spencer, 2012). Retailers such as the House of Fraser even opened a variety of PS with no stock (Genecon LLP & Partners, 2011). De Kare-Silver (2011) suggests that, for an organisation to survive, the retailer must implement a 'showcase strategy' and build a multi-channel capability around the PS. More retailers are successfully utilising their PS as a distribution hub and setting up ship-from-store and reserve-in-store programmes (Berg, 2014; Felsted & Robinson, 2014).

According to Thomson (2012) fashion retailers have always been at the forefront of digital innovations. Burberry, a high-end fashion retailer who have on-line and PS retail presence, are a prime example of a key driver of utilising technological innovations in retail. Burberry stream fashion shows to mobile devices, use avatar technology and provide an instant purchase tool through twitter (PR Newswire, 2012; Croft, 2014). A strategy according to a number of authors that is prevalent in the luxury high end market, to immerse the customer in the brand through the creation of theatricals in the PS (Pine & Gilmore, 1998; DeakinPrime, 2011; Deloitte, 2011; Baker, 2012). Arguably Burberry have positioned technology central to their competitive strategy with digital innovations as their main method of differentiation from their competitors. This could suggest that innovative technology is arguably fundamental to shaping an organisation's customer value propositions in the luxury high-end market.

The points of customer engagement are not just about using the digital resources available for greater customer interaction and collaboration. There are other assets within retail that can be used to reshape an organisation's customer value propositions.

Tough economic times have seen organisations making decisions on cutting hours, closing retail units and operating with fewer staff (Braff & Devine, 2009). The added pressure of rising costs and increased prices have resulted in a significantly less satisfied customer (Braff & Devine, 2009). Braff & Devine (2009) state that improving on the customer experience is of importance and suggest that organisation's must minimise wasteful spending and invest in the drivers of satisfaction. According to Businessline (2013) one of the major challenges in the luxury brand market is the lack of trained staff. In the luxury high end market, uniqueness is achieved through the development of a relationship the retailer has created with their customer (Investment Weekly News, 2012). This market could leverage on what authors such as So *et al.*, (2013) point out, namely an individual's desire to create an attachment with others as a basic human need. Luxury high-end brands such as Louis Vuitton have recruited specialist consultants to deliver specific training programmes that will train staff for this particular market (Businessline, 2013). Whilst there have been a number of initiatives to capture customer loyalty through the relatively simple concept of retail loyalty schemes that offer incentives (Yi & Jeon, 2003), the effectiveness of these schemes has never been truly measured (Lin & Bennett, 2014). Bitner (1992) proposes a different approach, one that reviews the environment and the service that the staff provide to create a service experience. DeVine & Gilson (2010) discuss a concept referred to as the behavioural experience: a change in the behaviour of how a message is relayed to a customer.

2.5 The Wider Network and the Physical Store

An engaging shopping experience within a PS is arguably not enough to entice a customer. The PS is not an independent entity; it is interdependent on the wider value system and its surroundings (Porter & Kramer, 2011).

Unlike an out-of-town shopping mall, town centres have evolved from market stalls and have not been strategically planned. Various authors suggest a town centre should be led by an unbiased management team who have a key interest in developing, implementing and maintaining a shopping destination that delivers a clear brand message that is representative of the local area (Genecon LLP & Partners, 2011; Portas, 2011; Porter & Kramer, 2011). This is a management team that is clear on the town centre's USP, a team that can install and maintain an enriched retail mix (Genecon LLP & Partners, 2011; Portas, 2011; Porter & Kramer, 2011). In order to create a shopping destination, there must be a mix of education, entertainment, leisure, pop-up shops, residents, business units, community, health, and culture (Portas 2011; Sadek 2013; Centre for Retail Research 2015). These are opportunities that will create a local economic hub (Sadek, 2013). Porter & Kramer (2011) suggest an organisation should focus less on cost and quality improvements and more on shared value. Shared value is the benefit to society from any changes made within an organisation (Porter & Kramer 2011). This provides the opportunity to create a positive feedback loop in the wider network and achieve a sustainable local economy (Porter & Kramer, 2011). This wider network encompasses government bodies to create regulations that work with and not against retail (Porter & Kramer, 2011). This wider network is inclusive of competitors working together and clustering similar shops within one area (Porter & Kramer, 2011; Montgomery, 2015). An initiative that will offer the customer choice where small independents who sell similar products co-operate instead of just competing. Effective on-line relationships also bring the outside into the PS through digital means (Piotrowicz, 2012).

According to Centre for Retail Research (2015) the regions that will have fewer shop closures are those that are known for their tourism. A town centre should leverage on the local tourism in order to create something the on-line environment cannot (Baker, 2012).

2.6 Conclusion from the Literature

The fundamental threat to the PS is the emergence of the on-line shopping channel. The on-line shopping channel has offered the customer a new way to shop. This new shopping experience has questioned the future of the PS.

There is no longer a need to visit a PS to purchase an item (Thomson, 2012; Marketing Weekly News, 2014). Centre for Retail Research (2015) takes a contrary position and believes that the PS still has a role in the purchasing journey. However, Centre for Retail Research (2015) also states that the role of the PS channel will have to change to survive. This is due factors such as an increase in on-line spending, the changing patterns in how the customer shops, the pressure of high costs, and the customers' reluctance to spend (Centre for Retail Research, 2015).

A fundamental weakness within clothing are the similar product offerings. This means that for a clothing retailer to compete they must differentiate through the experience it offers the customer. Therefore, CE is central to the PS architecture. CE is applied, in this study, to three areas of the PS: internal operations; technology; and the outside area within which it trades. Due to the relevancy to the current retail climate an adaptation of Brown's (1999) concept of pillars for strategic customer care is applied to the PS architecture and used throughout this research. This creates three pillars within the architecture of the PS: 'CE within the PS', CE and the level of technology', and 'CE-The organisation and the external environment'. Using mainly a SWOT analysis as the main framework, certain cornerstones were identified. These cornerstones reside within each of these pillars and represent the areas that will help achieve competitive advantage and sustainable strategic growth and comprise of staff; the senses ;a showroom strategy; displays; the fitting room experience ; technological innovations; the omni-channel experience; leveraging on e-tailing purchases; the town centre as a destination; diversity in the town centre. These cornerstones are inclusive of the existing strengths within this channel, the sensory elements and the importance of seeing and touching a clothing product. A review of each of these cornerstones offer retailers the opportunity to leverage on differentiating through the CE. This is arguably experiential marketing, with less emphasis on the development of products and packaging and more on engaging with the customers through providing an experience that will empower the customer to connect not just physically but emotionally to the product (Chandrasekar *et al.*, 2012).

In addition to the use of an adaptation of Brown's (1999) pillars, Porter's value chain, a basic business for competitive advantage, is also applied to the architecture. This tool offers an insight into the linkages and trade-offs that can be created in an organisation's value chain to create a discrete value activity for competitive advantage. This concept is used to assist in shaping future research as part of the recommendations in chapter 6.

3 METHODOLOGY & RESEARCH DESIGN

3.1 Introduction

Following on from the literature review, this chapter illustrates how the empirical research will be carried out. Saunders research onion is used as the basis to develop and shape the research methodology and design (Saunders *et al.*, 2009). Saunders research onion can be viewed in Appendix 8.

3.2 The Research Rationale

The turn of the century has seen the dawn of a new distribution method in retail: the on-line shopping channel. This new channel has offered the customer a new experience in how to browse, purchase and communicate on the shopping journey. This has provided an experience where the customer arguably no longer has to visit a physical store, (PS), to purchase a product. This therefore questions the future of this channel.

There is an extensive amount of material on the different areas within retail; however, there is a minimal amount of research on the actual architecture of the PS that draws on those cornerstones that could help achieve competitive advantage and strategic growth for the PS channel. The rationale of this study is to identify and provide an overview of those cornerstones that develop the PS architecture to help achieve competitive advantage and strategic growth.

3.3 Research Aims and Objectives

The overall aim of the research is to identify whether, that with the availability of other distribution channels, the PS in clothing retail is a valuable asset.

The objectives of the research are to:

- 1 Conduct and evaluate secondary research which will:
 - 1.1 Evaluate the PS position in the current retail climate,
 - 1.2 Appraise the PS to identify the cornerstones within this channel which will help sustain competitive advantage and strategic growth,
- 2 Conduct and evaluate primary research to analyse the cornerstones within the PS architecture to help sustain competitive advantage and strategic growth,
- 3 Draw conclusions from research findings in order to:

3.1 Recommend the application of the cornerstones identified in the PS architecture to achieve competitive advantage and sustainable strategic growth,

3.2 Recommend future research.

3.4 Chosen Methodology

According to Brown (2006) the methodology is the philosophical framework from which a study is based. The methodology of the research should follow two sets of criteria: a) achieve the aims and objectives of a study, and b) be effective in other research of a similar nature (Alan & Randy, 2005).

According to Saunders *et al.* (2009) research very rarely falls within one philosophical domain. This study is a mixture of wanting to know the facts, feelings and attitudes of the participants and therefore uses a mixture of approaches (Saunders *et al.*, 2009). This creates a study that will take a pragmatic philosophical position. The main premise of a pragmatic philosophical position is the importance of answering the research question (Saunders *et al.*, 2009). This means that different approaches can be used to provide the appropriate answer to a particular question (Saunders *et al.*, 2009). A pragmatic approach takes the view that each philosophical approach is a continuation of each other as opposed to opposite philosophical positions (Tashakkori & Teddlie, 1998). This is an intuitive approach that allows the researcher to conduct a study that is of interest and adds value (Tashakkori & Teddlie, 1998).

The other philosophical positions within this study are positivist and interpretivist. Positivist is concerned with the natural sciences and tests a theory. Bryman & Bell (2007, p.17) defines positivism as:

‘the generation of scientific knowledge based on the generalisation propositions that can be tested against the facts, from which it is possible to discover how to organise better’.

Interpretivism is the alternative to a positivist approach, and is concerned with the social sciences – people and organisations. This approach requires a different logic, one that involves the interpretation of human logic (Bryman & Bell, 2007).

Bryman & Bell (2007, p.19) defines interpretivism as:

‘a strategy.....that respects the differences between people and objects of the natural sciences and therefore requires the social science to grasp the subjective meaning of social action’.

There are different approaches to collecting and analysing the data in each of the philosophical positions. The two broad terms widely used in business research are quantitative, and qualitative (Saunders *et al.*, 2009). The positivist philosophical position is the quantitative approach to research. This approach provides the facts through scientific enquiry and can be defined as numerical (Saunders *et al.*, 2009). The interpretivist philosophical position is the qualitative approach to research and can be defined as non-numerical i.e. words, images and video clips (Bryman & Bell, 2007; Saunders, Lewis & Thornhill, 2009).

The use of more than one approach in research is referred to as triangulation (Saunders *et al.*, 2009). Triangulation in research allows the researcher to leverage on the strengths that each method offers. For example, while a positivist approach through quantitative analysis does not, in this case, apply enough detail to the research, the interpretivist philosophical position in the study using a qualitative analysis provides this detail, through creating the right environment by which to extract depth through discussions (Saunders & Lewis, 2012).

Therefore the rationale for triangulation in this research is to provide an enriched set of data that is created through the different research strategies affiliated with each of the previously mentioned approaches. The different strategies in this research that are used to collect the data for analysis are a survey strategy, with the administration of a questionnaire, and grounded theory, through the administration of a focus group, (FG). The questionnaire takes a positivist philosophical position using quantitative analysis. The FG takes an interpretivist philosophical position using qualitative analysis.

According to Bryman and Bell (2007) quantitative and qualitative research can facilitate each other. Incorporating a FG and a questionnaire in this study has certain advantages (Saunders & Lewis, 2012). Certain strategies suit certain stages of the research, and each of which focus on certain areas. This assists in establishing credibility (Saunders & Lewis, 2012).

A FG strategy is compatible with grounded theory with the main emphasis to building and developing a theory (Saunders & Lewis, 2012). Such a theory is developed by generating data through a series of observations (Saunders & Lewis, 2012). For this research the observations are through one FG meeting. This provides an inductive piece of work to assist in shaping a theory using an interpretivist philosophical position to provide an understanding of what is going on. This exploratory approach provides flexibility within the study, enabling the researcher to assess topics in a new light, and facilitate discussions around points that may not be realised previously (Saunders *et al.*, 2009). The setting also allows for a larger amount of more complex and open-ended questions in a varied order (Healey, 1991;

Easterby-Smith *et al.*, 2002; Jankowicz, 2005). The researcher is part of the data collection process. The main disadvantage of this approach is its subjective nature. This particular strategy allows for a large amount of bias on behalf of the researcher. However, the main advantage is the FG provides the detail a questionnaire cannot, the researcher can probe further into the responses provided by the participants, therefore providing depth to the study (Saunders *et al.*, 2009). For the purposes of this study a one-to-many interview technique in a FG setting is used.

A survey is a popular choice in business (Saunders & Lewis, 2012). This strategy asks the 'who', 'what', 'where', 'how much' and 'how many' questions (Saunders & Lewis, 2012). A survey strategy is chosen for this study for the benefit of producing standard questions that will deliver a large amount of data that can be collected in a time efficient and cost effective manner (Saunders & Lewis, 2012). However, the main disadvantage of this approach, is the absence of detail (Saunders & Lewis, 2012).

When using a survey strategy in research the researcher is independent of the data collection process and will not be able to change any of the substance of the material that is collected (Saunders & Lewis, 2012). This is a highly structured method that is easy to replicate in other research of a similar nature (Gill & Johnson, 2002). This strategy offers the descriptive element of the study and is used to assess a certain situation (Saunders & Lewis, 2012). However, due to circumstances, the chosen sample framework for the questionnaire is a snowball sampling technique. This is a non-probability sample. Therefore, the researcher will not seek an explanation for a certain event through discovering causal relationships between variables (Saunders & Lewis, 2012). Instead she will use this information to assist in shaping future research as part of the recommendations in chapter 6. The application of this type of convenience sampling to the survey will not allow for any generalisations to be made about the population as part of this analysis, and therefore will make it less of a quantitative study. The sample framework and selection criteria will be discussed in the following section 3.5.

How the FG and the questionnaire will be administered is discussed in section 3.6 and 3.7.

3.5 Sample Framework and Selection Criteria

For this study, the population sample consists of people. The sample unit is a person over the age of 18 who is contactable by digital means.

The sample framework and selection criteria for the survey normally applies a probability sample where the population is known, in which statistical inferences and generalisations about the population can be made (Saunders & Lewis, 2012). However, for this research a

snowball sampling technique is applied. This is a type of convenience 'non-probability' sample (Bryman & Bell, 2007; Saunders & Lewis, 2012). A snowball sampling technique is selected for reasons to do with: limited access to a population sample; limited time and financial resources; and because of this, a method that provides a large amount of data in the most economical way (Saunders & Lewis, 2012). The sample size accumulates through making initial contact with a number of candidates who then identify further respondents (Saunders & Lewis 2009). This process continues until there are no new cases, or the size of the sample is manageable and of an acceptable size (Saunders & Lewis 2009). There is no way in snowball sampling of identifying who is in the population (Bryman & Bell, 2007). Therefore this makes the results less reliable than in a probability sample (Saunders & Lewis, 2012). Based on Henry (1990), the recommended minimum research size for the survey strategy will be 50+ respondents.

The sample framework and selection criteria for the FG and the pilot survey will be selected using a purposive sample technique with the application of a homogeneous sampling strategy. This technique seeks a population that will be selected based on the judgement of the researcher to select the participants that will best fit the criteria to answer the research aims and objectives (Neuman, 2000). For those who participated in the FG, anonymity was achieved by ascribing a code to each participant. Four of the participants in the FG were experts in the field. The profiles of these participants can be viewed in Appendix 2. There will not be any incentive for the participants to attend the FG. Therefore, attendees will be volunteers.

3.6 The Focus Group Strategy

In order to assist in shaping the questionnaire design, the FG will be conducted first.

The FG is also part of the questionnaire pilot and will assist in shaping the questionnaire design and content. The FG will comprise of open-ended questions to generate discussions.

Due to budget, time constraints, and the purpose of the study, only one FG will be conducted. While there will not be a pilot element to this particular strategy there will be preparation. This preparation stage will include rehearsals, invitations, and the completion of a consent form by all the participants. The content of the invitation letter and the group discussion guidelines are shown in Appendix 1, and Appendix 3.

The discussions will be recorded on an iPad and a USB audio recorder. The participants can request the recording to be stopped at any time (Saunders *et al.*, 2009). The facilitator of the discussions will pay particular attention to a number of areas: establish credibility and trust; create rapport with the participants; encourage the participants to discuss their points of view

without any pressure to reach a consensus (Krueger and Casey, 2000); dress code (Saunders *et al.*, 2009); maintain a neutral tone; avoid leading questions (Saunders *et al.*, 2009); encourage critical incidents by asking participants for examples (Keaveney, 1995); adopt an open posture (Saunders *et al.*, 2009); and hold back thoughts that might divert the participant's train of thought (Saunders *et al.*, 2009).

3.7 The Survey Strategy

Following on from the FG, a survey strategy will be used in this study through the administration of a questionnaire.

The preparatory stages must be right, once the survey is in the go-live stage, changes cannot be made (Saunders *et al.*, 2009). For this reason a pilot survey is administered first. This will ensure: that the questions answered the aims and objectives of the research; that the design, flow and clarity of the survey is to an acceptable standard; that the data collected is reliable and valid (Saunders *et al.*, 2009); that the questions are kept concise and to a minimum (Dillman, 2000); and that the survey is of a satisfactory length (Edwards, *et al.*, 2002). The researcher is aware that a survey is far from a quick solution, and will apply a substantial portion of time to the stages of, design, piloting the questionnaire, and analysing the data (Saunders & Lewis, 2012).

The survey is designed and piloted using the free software package from Survey Monkey (SurveyMonkey, 2014). An additional survey will be incorporated with the pilot. This survey is designed to check the respondent's opinion on the design, layout and clarity of the questions in the pilot survey (Bell, 2005). Questions included in the feedback survey can be viewed in Appendix 5. Results from the feedback survey revealed that it took no more than 3 minutes to complete and was clear and concise with no errors.

The actual survey will be compiled using an upgrade in SurveyMonkey at a cost of £24.99 (SurveyMonkey, 2014) and administered through Facebook posting. Certain gate-keepers will be tagged to enhance the number and variety of respondents. This idea of leveraging on the idea of gatekeepers is derived from Buttrick (2005), 'The Project Workshop'. The snowball sampling technique will take effect when the survey is shared. There is no method by which to trace who completes the survey; this will provide complete anonymity. A two week time frame is allocated to collect the data from the survey. The survey questions can be viewed in Appendix 6.

3.8 Research Time Horizon

According to Saunders & Lewis (2012) there are two different time dimensions that can be applied to the research: cross-sectional and longitudinal. Due to the practicalities of the time-

scale, a cross-sectional time horizon was chosen. This is a popular choice in academic research (Saunders & Lewis, 2012). This allowed for the data to be collected from certain types of people to provide an insight into current thinking at a point in time (Saunders & Lewis, 2012).

A longitudinal approach was not applied to the research as this kind of study observes change and development over a certain length of time (Saunders & Lewis, 2012). This takes significantly longer and is not always practical for students who are undertaking research for academic purposes (Saunders & Lewis, 2012).

The main body of the literature review will be undertaken in the first quartile of the research timeline. This is to be followed by the empirical research that will be during a neutral time of year where people are less busy than at other times of the year. Both the FG meeting and the administering of the survey will be administered within the same 1 month period. Once the data is collated, the results will be analysed and the conclusions and recommendation chapters drafted.

3.9 Analysis Technique

The analysis stage of the study is the point where the researcher interprets the data. This is an area where there is the greatest danger of making false assumptions (Saunders *et al.*, 2009).

The audio tape will be transcribed within 48 hours of the FG meeting. This transcription will be categorised into themes using a matrix. According to Saunders *et al.* (2009) this is when patterns will emerge. Names of each of the categories will be taken from terms used by the participants and in the literature review (Strauss & Corbin, 1998).

A copy of the disc with the audio recording and the transcription is provided at the back of this dissertation. Extracts of this transcription can also be viewed in Appendix 7. The matrix can be viewed in Appendix 4.

The data will be exported from SurveyMonkey to Excel, then to an SPSS software programme for analysis. The cross-tabulation in SPSS offers greater depth and a wider scope than if only Excel was to be used.

The analysis of the data will be spilt as follows:

Q1 and Q2 of the survey will provide the population breakdown,

Q3 and Q4 of the survey and Q1 of the FG will assist in answering the aim of the research,

Q5 to Q10 of the survey, and all the remaining questions and discussions in the FG will establish the cornerstones within the PS architecture.

3.10 Validity and Reliability

The extent to which the research is valid and reliable is determined by how appropriate the research is for evaluation (Bryman & Bell, 2007). While validity relates to the credibility of the research findings and conclusions (Saunders & Lewis, 2012), and whether these findings are what they really appear to be (Saunders *et al.*, 2009); reliability is concerned with consistency (Saunders & Lewis, 2012).

The areas that threaten reliability are: data collected at different times; respondents providing unreliable information; observer bias created through asking the same question in a different way; and observer bias created through the interpretation of results (Saunders & Lewis, 2012). These must be either eliminated or noted within the limitations of the research (Saunders & Lewis, 2012).

The application of only one FG and one survey, administered using a snowball sampling technique, makes this study less valid and reliable. This study would be more valid and reliable if there were a number of FG meetings and a probability sample applied to the survey. In addition, there are certain aspects of the study, where assumptions will be made on the respondents/participants level of knowledge. This is in particular reference to any questions on specific technologies used in retail. This could make the study less valid.

3.11 Research Limitations & Reflection

This dissertation is written on the basis of certain limitations. This chapter offers a description of those limitations. This chapter also includes a reflection on certain areas within this research.

On reflection about this study, an opportunity to involve a well-known high street retailer in the study could have offered the researcher the opportunity to have access to staff, customers and perhaps financial resources. These financial resources might have assisted in funding the purchase of responses from SurveyMonkey and provided an incentive to entice a higher number of respondents to answer the survey and attend more FG meetings. Whilst the first FG meeting was to assist in designing the survey as well as collating primary data, the researcher would have liked an additional FG meeting to be held after the survey results had been collated, with the objective to discuss the findings from the survey. Additional FG meetings would have further exhausted the information, hence providing a more detailed analysis (Saunders & Lewis, 2012).

This study was limited by the sample technique applied to the survey strategy. Using a survey strategy without a statistical analysis is an approach not widely used in academic research. However, with minimal financial resources and a study reliant on the collation of the primary data from the goodwill of friends, family, ex-colleagues, and the general public, the researcher has had to apply a snowball sampling technique to achieve the largest amount of data in the shortest space of time with limited financial resources.

The study is limited by the researcher's level of expertise. This is the first time the researcher has conducted academic research; therefore the level of expertise is low. One particular weakness is in the compilation of the survey where a number of the questions, in hindsight, were lengthy and were possibly the reason for some non-responses to the survey as the survey progressed.

Certain times of year may have affected data content and the response rate e.g. festivities and holidays (Saunders & Lewis, 2012). This is not the case with this study; the survey and the FG will be conducted at a less busy, and neutral time of year. Both the FG and the survey data collection will be within the same 4 week period.

The researcher has limited control over certain areas within this research that may create skew. The researcher has no control over an outcome affected by an experience the respondent or participant may have had close to the time of data collection (Robson, 2002). The researcher is also limited on who would complete the survey once it was administered. There is the risk that respondents will provide answers that they believe will benefit, or at least not hinder, their current employment status or their chances of future employment (Saunders *et al.*, 2009). This therefore questions the validity of the data based on the present or future vocation of those who answered the surveys.

The study was not limited by the participant's and respondent's level of knowledge on the overall topic of shopping for clothes. However, there was a limited level of knowledge on certain initiatives that could be implemented in the PS, particularly those that are technology based. The extent of this limitation is measured by giving the respondent an option to answer these particular questions with 'I do not know what this is'.

3.12 Ethical Considerations

According to Saunders & Lewis (2012, p.74) ethics are defined as:

‘The appropriateness of the researcher’s behaviour in relation to the rights of those who become the subject of a research project, or who are affected by it’.

Ethical considerations have an impact on the topic that is selected and the research design (Saunders & Lewis, 2012). This research is not attached to an organisation and therefore consent is only to be obtained from those who responded and participated in the survey and FG. It is considered for this research that a population sample of 18+ years of age is an age at which the participant is independent and can make choices.

Confidentiality will be considered at all times: the survey is internet-related and cannot be traced to source. Those who participate in the FG will be coded in all of the transcriptions.

Attention is given to the FG interview to ensure that none of the questions, particularly any unplanned follow-up questions, did not humiliate or harm the participant.

4 RESULTS & ANALYSIS

4.1 Introduction

Following the recently conducted primary research and methodology discussed in the previous chapter, this chapter will address the analytical interpretation of the results and their application to the main purpose of the research set out in Chapter 1.

With the overall aim:

To identify whether that with the availability of other distribution channels the physical store, (PS), in clothing retail is a valuable asset.

With the objective to:

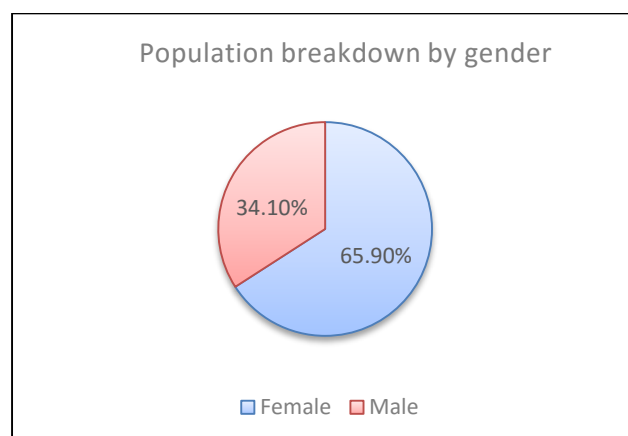
Conduct and evaluate primary research to analyse the cornerstones within the PS architecture to help sustain competitive advantage and strategic growth.

The central analysis of the findings reveal that the PS is a valuable asset; however, not as a stand-alone retail operation but as part of a multi-channel retail enterprise. The need for a PS matches what Marketline Advantage (2014b) reveal. That is 90% to 91% of clothing sales for 2014 are attributed to the PS channel in the UK. However, the empirical research does not match the opinions of De Kare-Silver (2011) and Thomson (2012) who suggest that the customer no longer needs to visit a PS to purchase an item.

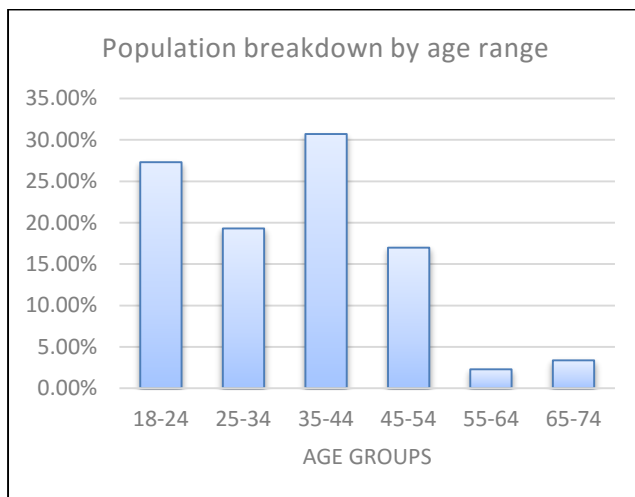
4.2 The Sample Size

The sample sizes for each of the data collection techniques were: pilot survey 10, focus group, (FG), 8 and the go-live survey 78. Graphs 1, 2 and 3 show a breakdown by gender and age range of those who responded to the survey.

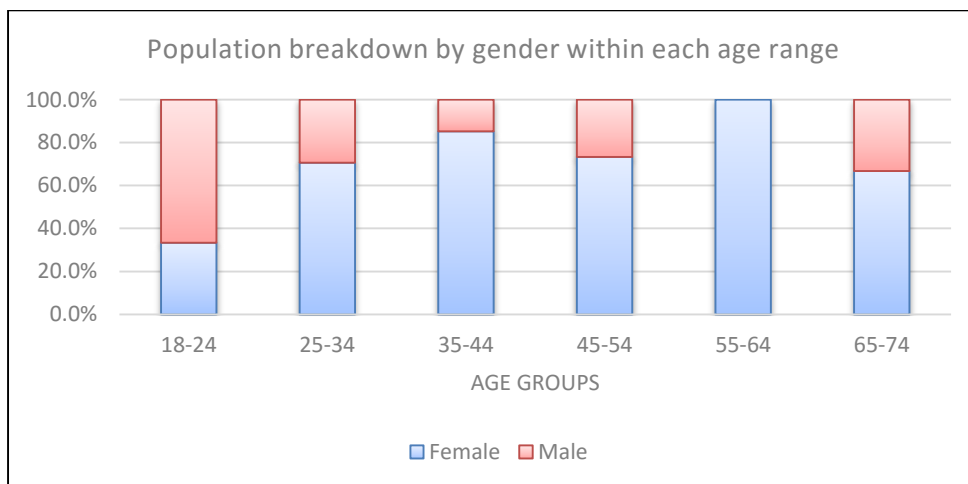
Graph 1. A breakdown of the population sample by gender



Graph 2. A breakdown of the population sample by age range



Graph 3. A breakdown of the sample population by gender in each age range



There were more females than males in both of the data collection methods. This is represented in ratio terms as 3:1 in the FG and 2:1 in the survey.

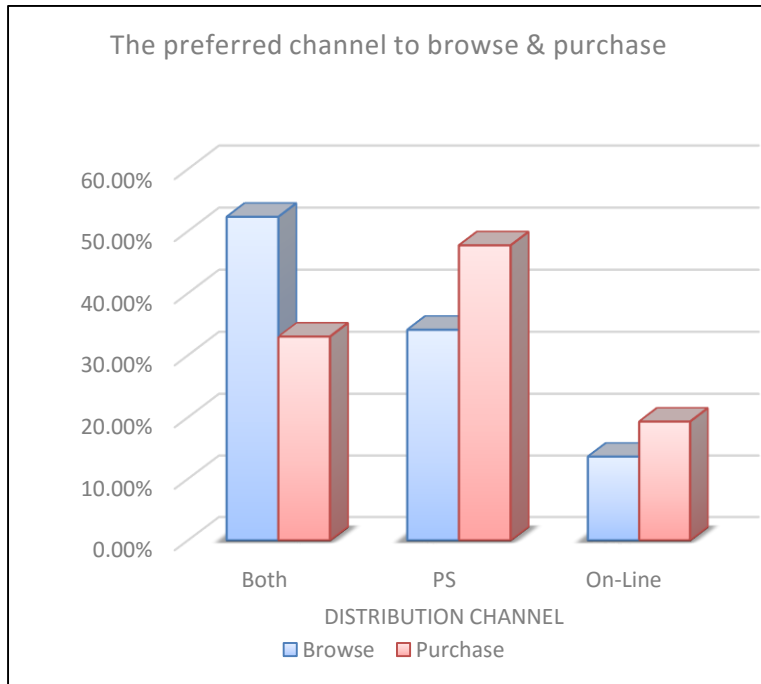
The age range in the FG is 31 up to 68. Together, the survey and the FG population sample represented an age range of 18 to 68. However; the main representation was within the 18-54 age range, with minimal representation from the age of 55+.

The time it took to conduct the FG meeting was 57 minutes. Anecdotal feedback from the group indicated that the participants found the meeting relaxed, enjoyable, thought provoking and good fun.

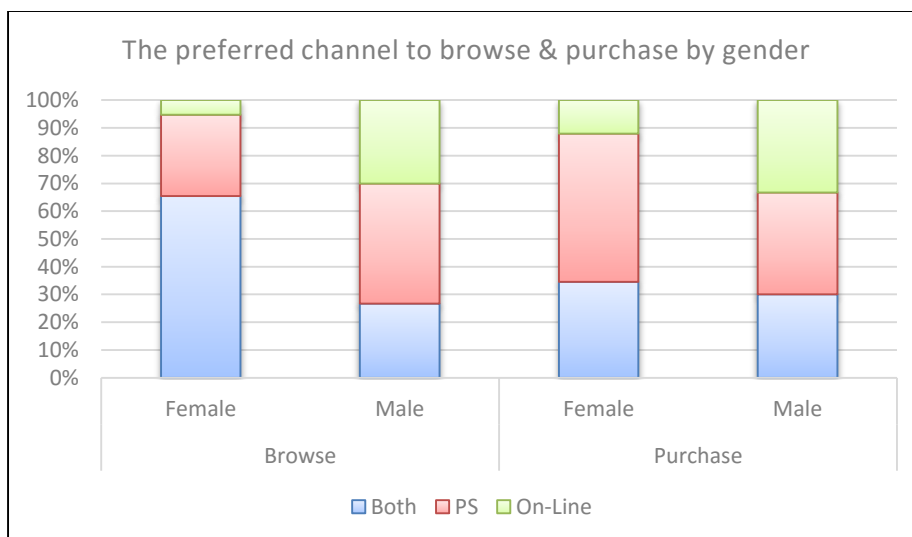
4.3 The Preferred Channel to Shop

Responses to Q3 and Q4 of the survey and discussions from the FG reveal that the PS in clothing retail is a valuable asset by which to browse and purchase a clothing item. The least preferred option is the on-line channel. These results are shown in graph 4, 5 and 6.

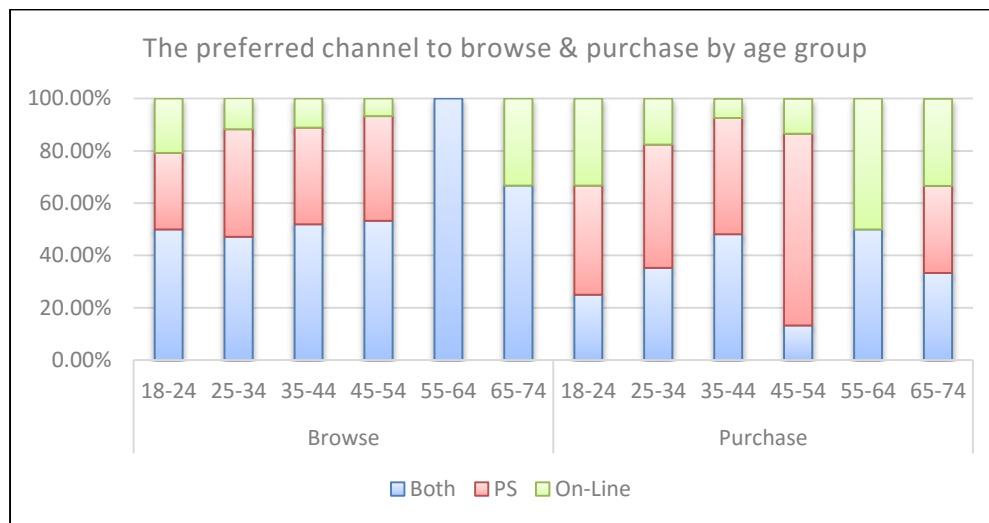
Graph 4. The preferred channel to browse & purchase a clothing product



Graph 5. The preferred channel to browse & purchase a clothing product by gender



Graph 6. The preferred channel to browse & purchase a clothing product by age group



Even with the increase in internet usage (Newbery & ter Meulen, 2010), and the emergence of a digital generation (Piotrowicz, 2012), the empirical research reveal that there is a role for the PS in the purchasing journey. This evidence is further supported by Marketline Advantage (2014b) who state that 90% to 91% of clothing sales for 2014 are attributed to the PS channel in the UK. The results do not, however, share the same views of those who suggest there is no longer a need to visit a PS to make a purchase (De Kare-Silver, 2011; Thomson, 2012).

The empirical evidence seems to confirm the opinions of a number of authors who state that the customer certainly browses and shops across channels (Houliez, 2010; Deloitte, 2011; Marketing Weekly News, 2014). The browsing across channels, with the exception of footwear, is mainly at the research stage of the purchasing journey. Findings reveal that the customer browses on-line first followed by a visit to the PS. The empirical evidence suggests that once the customer is in the PS they tend not to browse and purchase across channels. In the case of footwear, some of the findings revealed that there is cross channel activity when the customer is in the PS.

Whilst the findings from the empirical research reveal that the PS remains popular, Piotrowicz (2012) is of the opinion that the PS is struggling to compete with the on-line channel. What does not help the PS are the hefty operational costs in contrast to the minimal outlay for a web-based retailer (Cuthbertson & Johnathan, 2004; Gounder, 2012; Ogben-Barnes & Barclay, 2012; Portas, 2011; McCaughren, 2015). For this reason the remaining sections within this chapter discuss those areas, the cornerstones that relate to a sustainable future of the PS channel.

The pillars and their cornerstones are shown in Figure 1 in section 1.7, this diagram is the main framework for the analysis below.

4.4 Customer Experience in the Physical Store

In this section the first of the three pillars is reviewed. There are five cornerstones within this pillar that address the customer experience (CE) within the PS. These cornerstones arguably relate to the experiential retailing principles of the architecture. Principles that connect with the customer on an emotional level as opposed to the product functionalities.

4.4.1 Staff

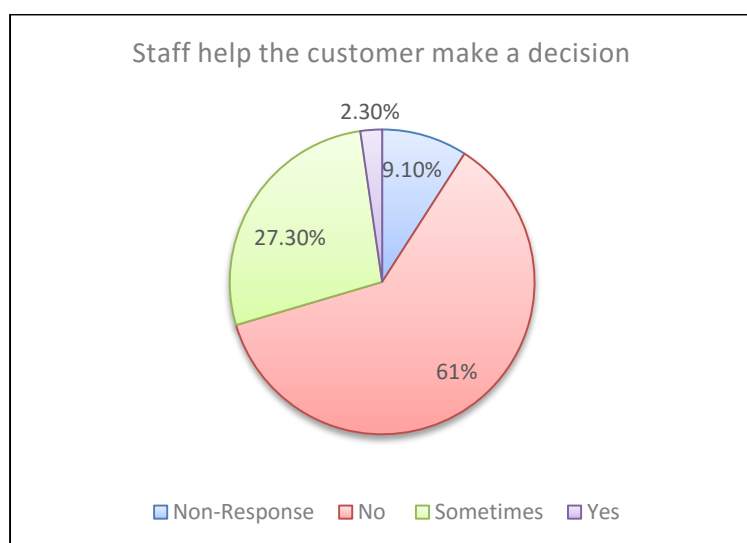
This is the cornerstone that stood out as the main area for competitive advantage. With a product that is becoming less distinguishable, the only way a business can differentiate from competitors is through the customer service the PS provides (Wellington, 2010; Investment Weekly News, 2012). The results from the survey and the FG show that the PS is not fully leveraging on those who work for the organisation as a differentiation strategy for competitive advantage.

Authors such as Cuthbertson *et al.* (2012), state people are a major resource within an organisation and can offer innovation in different ways. Investment Weekly News (2012) is of the opinion, that, particularly in the luxury brand market, uniqueness is achieved through the relationship the retailer creates with their customer to achieve sustainable growth and longevity (Investment Weekly News, 2012). It is the staff that are the experts. They are the 'intellectual capital' of the organisation (Belasco & Stayer, 1994), and if the intellectual capital can be 'harnessed' the human resources become valuable assets.

Findings from the FG discussions reveal that staff generally often have a poor attitude that affects the customer experience and that this poor service is directly linked to the terms and conditions that staff have to work within. Such terms and conditions include; poor pay; limited contracted hours; being undervalued; seasonal staff (defined as temporary staff only required at busy times of the year); students; feel disposed due to an abundance of replacements; and not respected. These points made in the FG may also be related to the opinions of Braff & DeVine (2009) who suggest that tough economic times have resulted in organisation's cutting hours, closing retail units, and operating with fewer staff, all of which leaves a significantly less satisfied customer. A number of authors also suggest that, with the internet, less human intervention is needed in making a purchasing decision (Stakeholder, 2010a; Deloitte, 2011; Portas, 2011).

This may be the reason why the majority of those that answered the survey felt staff do not help in making a decision to buy. These results are shown in graph 7.

Graph 7. Staff help the customer make a decision



According to the FG, retail should be made into an attractive career with more investment in wages and training. Participants in the FG suggested that a member of staff who worked in a fashion department should be more of a personal shopping assistant. This relates to Clothing Stores-quarterly update (2015) who point out that the mid-market offer a personal shopping service. According to Chapman (2015) such an initiative could reduce the risk of returns. This is arguably changing the role of the traditional shop assistant to one who takes on more of a professional vocation, such as a field sales manager as seen in other industries.

PF5 gave an example of her experience of an appointment with a personal shopper in a well-known department store. This particular experience was poor; the personal shopper was absent and the service that PF5 received indicates that the replacement was someone from the shop floor who was not sufficiently trained to offer the same service. This is one example of poor training that affects the customer experience.

According to the FG, the role of staff should consist of someone who is available to answer any questions, retrieve sizes and colours, and advise on the right fit. The staff should not flatter and upsell. This suggests staff adopt more of an advisory, consultancy role.

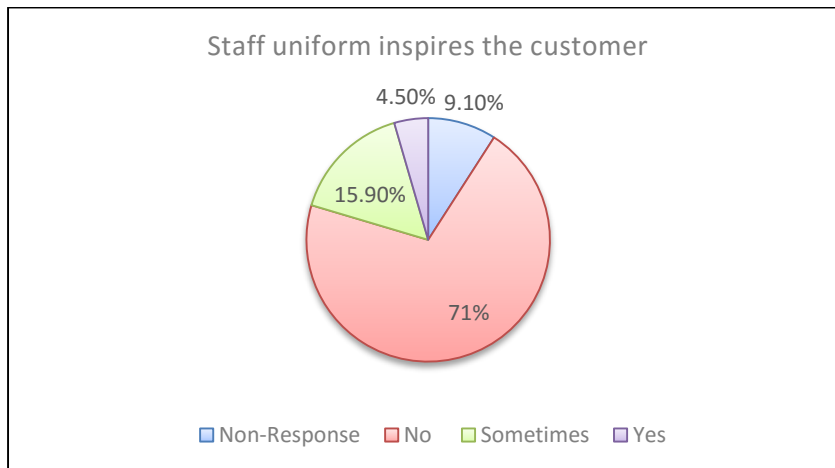
PF6 returned to the same stores because she felt the staff had got to know her. This is similar to the views of such authors as Bain & Co (2005) and Choo *et al.*, (2012) who suggest creating association through an emphasis on emotional value as opposed to differentiating through brand identity (Bain & Co, 2005; Choo *et al.*, 2012).

According to the FG, staff training will incentivise, make them feel valued and part of the business. This will also build staff confidence to sell well through a better understanding of the product. However, Marketing Weekly News (2014) suggests that jobs in retail require minimal skill. Findings from the FG reveal that staff in a sports shop do require more technical knowledge, e.g. the skill in finding the right type of running shoe. In other types of clothing products the staff should be able to match a shirt with a tie, and, in the case of Jeanswear, advise on the right fit. Staff depth of knowledge in terms of where a product is sourced is of no concern to some of the participants, whilst for others, where a garment is manufactured depends on the market within which the retailer trades. According to the FG there is more emphasis on wanting to know where a product is sourced in the high end luxury market.

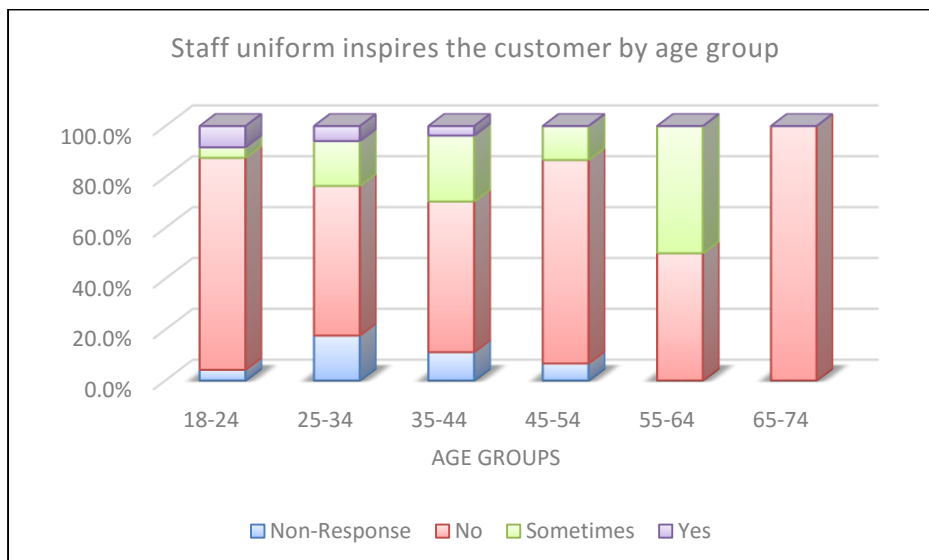
An area not initially thought of by the researcher, but which was highlighted in the FG, is the effect of what the staff wear on the customer experience. Staff in Timberland wear the products. For this reason PM4 suggests that they are better able to advise. Discussions in the FG revealed that staff for heavily branded products like Reiss, Timberland and independent boutiques should wear the merchandise to endorse the brand. However, in department stores, the staff should wear a generic uniform in keeping with the brand, a uniform that is suitable for a fashion department and where the staff are easily identified. PF7 gave a description of a generic uniform worn by staff in Marks & Spencer, Marble Arch, London, and deemed it as unsuitable to portray appropriately the fashion section of this store. According to PF7 smart trousers, a blouse and a name tag in keeping with the company colours is sufficient.

The results from the survey reveal that the majority of respondents are not inspired by what the staff wear, in particularly the 18-24 age range. These results can be reviewed on the following page in Graph 8 and 9.

Graph 8. Staff uniform inspires the customer



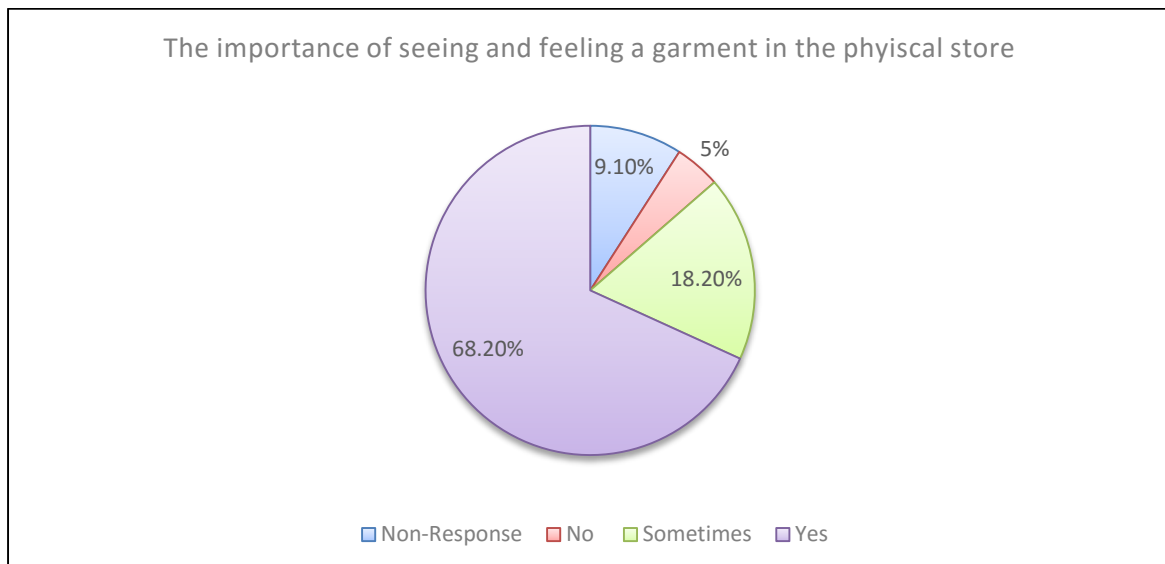
Graph 9. Staff uniform inspires the customer by age group



4.4.2 The Senses: Sight; Touch; Sound; and Smell

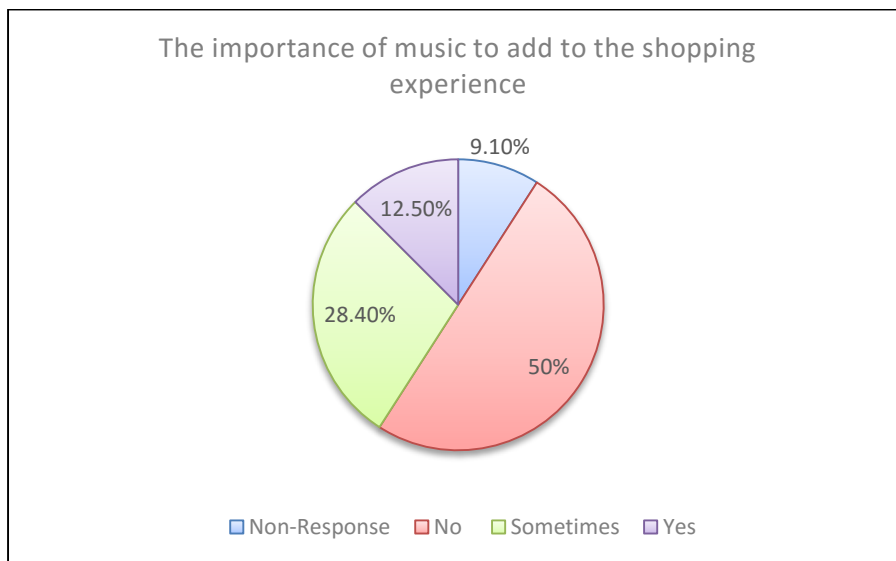
Findings from the empirical evidence reveal the customer likes to see and feel the product in a PS. These results can be reviewed in Graph 10.

Graph 10. The importance of seeing and feeling a garment in the physical store



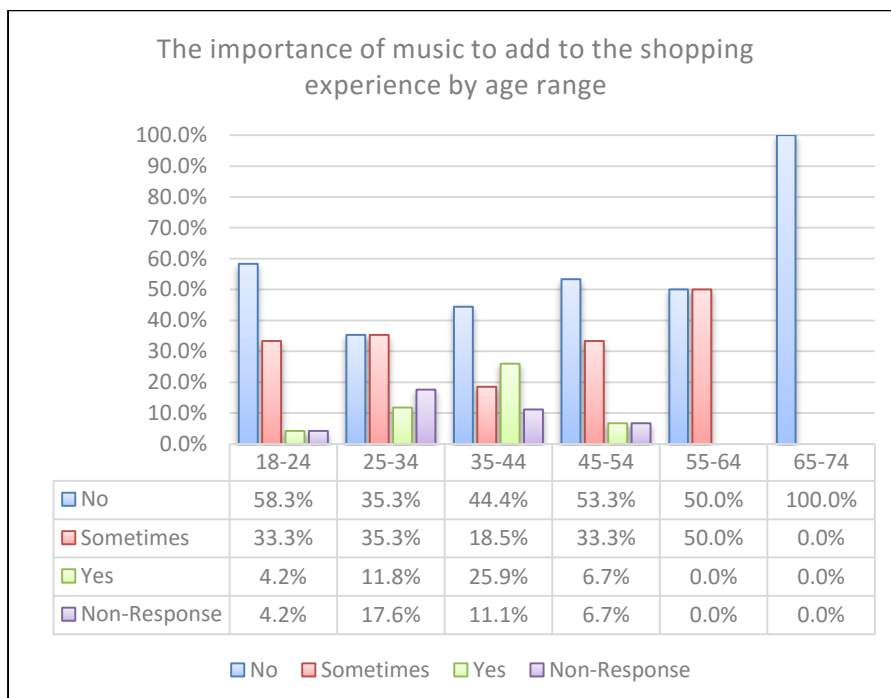
Seeing and feeling a product in a PS is the main strength of this channel (Davies *et al.*, 2003; DeakinPrime, 2011; Daniel *et al.*, 2012). As reviewed in section 2.3 according to Daniel *et al.*, (2012), it is not just the tangible aspects that affect the customer it is also smell, touch and owner-presence that has an influence on the customer experience. Abercrombie & Fitch are prime examples of a retailer that uses the senses to differentiate its brand and provide a unique experience (Daniel *et al.*, 2012). Sound particularly and the use of music has a profound effect on the shopping experience (Soars, 2009; Ogben-Barnes & Barclay, 2012). However, when asked in both the survey and the FG about the importance of music to the shopping experience there was minimal interest: PF1 'thinks music is irritating'. These results from the survey are shown in graph 11 on the following page.

Graph 11. The importance of music to add to the shopping experience



According to De Nora & Belcher (2005) the younger generation are influenced more by the senses, in particular music, more so than the older (De Nora & Belcher, 2005). However, findings reveal that this is not the case for the members of the younger generation who answered the survey. The majority of respondents within this age range did not feel that music adds to the shopping experience. These results are shown in Graph 12.

Graph 12. The importance of music to add to the shopping experience by age range



While there were not any direct questions asked on the sense of smell in the survey or within the FG discussion guidelines, there was not at any point in the discussions reference made to the sense of smell in retail. This may be an area to include in future research.

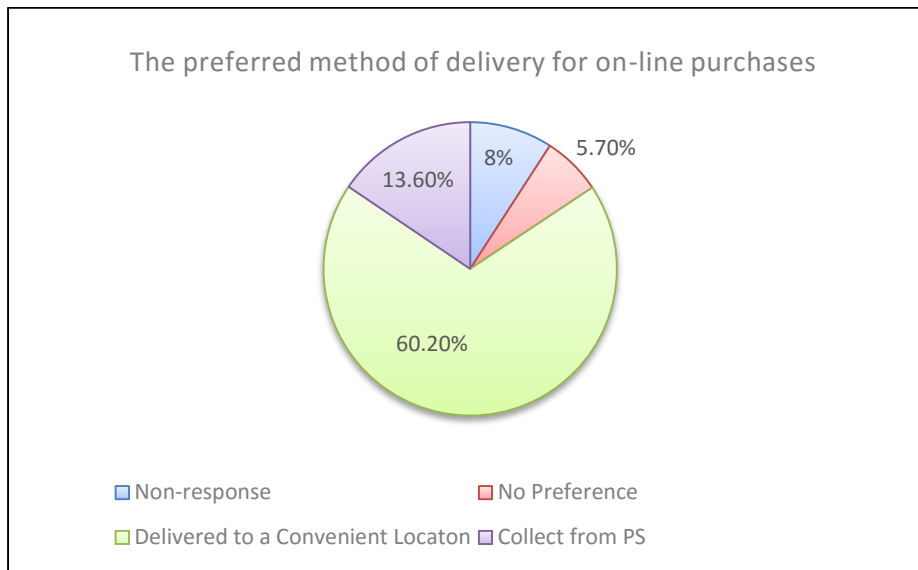
4.4.3 A Showroom Strategy

Findings from the investigated literature suggest that the purpose of the PS is not necessarily to obtain a sale but rather to enhance brand awareness (Deloitte, 2011; Spenner & Freeman, 2012). According to Deloitte (2011), retailers have not been quick enough to realise the role of the PS as a showroom, with the customer not necessarily wanting to see a whole range, but only a narrowed down representation of the products on offer. According to De Kare-Silver (2011), for an organisation to survive, the retailer must implement a 'showcase strategy' and build a multi-channel capability around the PS. As mentioned earlier, House of Fraser, a well-known department store, has gone as far as opening a variety of PS with no stock (Genecon LLP & Partners, 2011).

In contrast, the findings from the empirical research suggest the architecture should not implement a showroom strategy with less stock but should have the full range on display and accessible to purchase and try on in the PS. The FG indicated that they want to have easy access to the products that are on display and be able to browse and purchase the item in a PS.

Authors such as Berg (2014) and Clothing stores – quarterly update (2015) state that more retailers are utilising their PS as a distribution hub and implementing a ship-from-store and reserve-in-store service. The survey revealed that the preference of those who shopped online was to get the product delivered to a convenient location and not to collect it from the store. These results are shown in graph 13.

Graph 13. The preferred method of delivery for on-line purchases

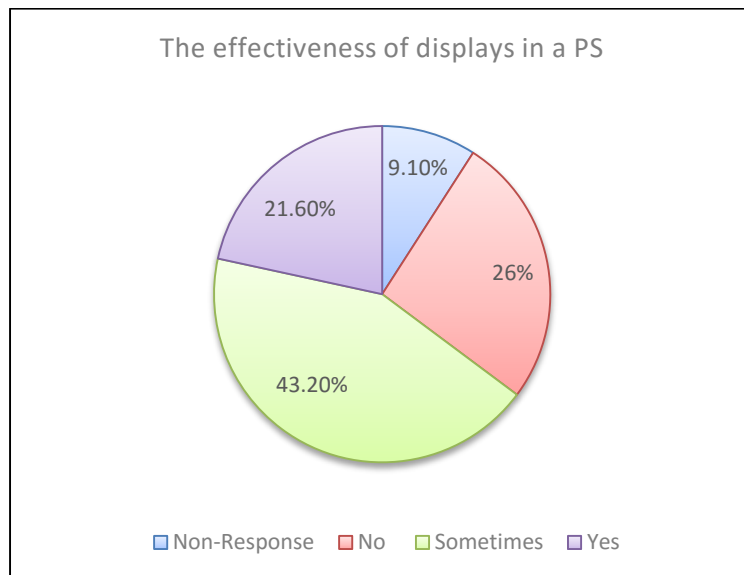


4.4.4 Displays

Findings from the survey show that the majority of respondents sometimes found the displays inspired them to make a purchase. These results are shown in graph 14. There were those within the FG who bought a complete outfit based on how effectively the products were displayed by the retailer. However, for Jeanswear, this is a product that could particularly benefit from being displayed together in one place, as opposed to across the different concessionary areas, as seen in most department stores. However, there was a mix of opinion on those that liked garments displayed that portray an image e.g. like how Next display their products, and those that liked to select their own look without any guidance e.g. TK Maxx.

The female participants in the FG felt strongly that the displays did not represent real women. In their opinion, displays must portray an image that is representative of what the garments will look like on the end-user. In their opinion the mannequins and models used by retailers give a distorted view of what the garment will actually look like on the customer. In their opinion, this distorted view is achieved through using professional models and certain techniques such as pinning the garment onto unrealistically shaped mannequins to achieve a better fit.

Graph 14. The effectiveness of displays in a physical store



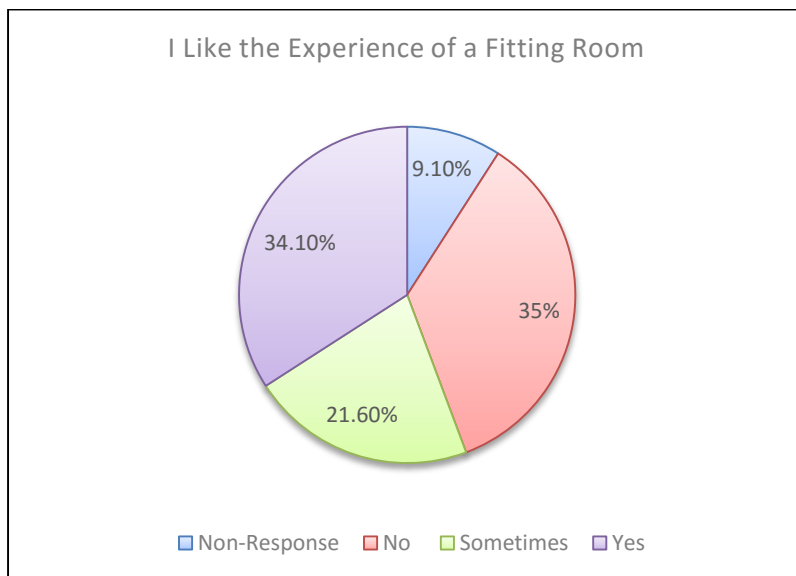
4.4.5 The Fitting Room Experience

Whilst the previous section focused on displaying the product on mannequins and models, this section is an analysis of leveraging on another area of the PS where the garment is also displayed, and that is on the end user in the fitting room. A fitting room could be considered as one of the main benefits of a PS, a channel that offers a facility to try on and see and feel the garment on a real person before making a purchase.

Where the PS has perhaps being able to leverage on the provision of a fitting room there has also been the recent emergence of new technological developments and the dawn of a virtual fitting room experience in the on-line store. This is a concept involving avatar's that simulate what the garment will look like on the customer through digitised means. This provides the customer with a more informed decision about what product to buy on a virtual platform (Greene, 2011; PR Newswire, 2012; Thomson, 2012; Croft, 2014). This enhancement arguably detracts from the uniqueness of a fitting room within a PS and questions the fitting room as part of the CE within the PS as a means of differentiation for competitive advantage.

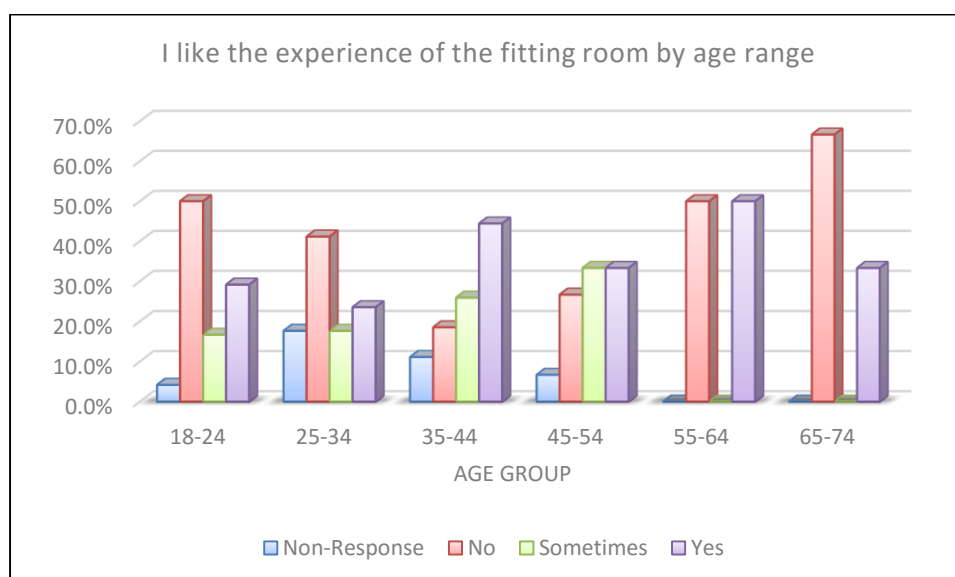
The empirical evidence from the survey revealed a mixed opinion on whether the experience of a fitting room was liked or disliked. These results are shown in 15.

Graph 15. The fitting room experience



Further analysis reveal that the majority of 18-34 and 25- 34 year olds do not like the experience of a fitting room within the PS whilst the 35-44 age range do; the 45-54 showed mixed results. These results are shown in graph 16 on the following page.

Graph 16. The fitting room experience by age range



These results may have a bearing on Piotrowicz (2012) who suggests that there is the emergence in the marketplace of a new generation of digital natives who trust technology and may be the reason as revealed in the empirical evidence that the younger generation are less concerned with trying on the PS. It is the FG that represented the 30+ age group who stated that it is important to have the facility to try on the garments, and that having the fitting room was the only reason that they went to a PS. However, according to the FG, this use of the fitting room is dependent on the garment type. A fitting room facility is needed less for trying on garments related to everyday wear and more for those needed for occasion wear.

Whilst the FG stressed that a fitting room in a PS was important, further discussions revealed that there was a significant amount of dissatisfaction of the fitting room experience. According to the FG, the lighting and mirrors used in fitting rooms manipulate the appearance of a garment, and in certain stores the fitting room area can appear 'tatty' and small. According to PF7 'even replacing curtain hooks would be a start'. The fitting room should have natural lighting, standard mirrors with front and back view, spacious, be clean and well maintained and have an assistant available for questions. Similar to opinions in the preceding section and the subject of manipulation in the use of displays, according to the FG, mirrors and lighting should reflect an image that is not distorted but true to what the garment will look like on the end user in the post-purchase stage. According to the FG, trying on at home not only offers the opportunity to try on where the customer has the correct underwear, shoes and accessories available, but can also be viewed in their own natural setting with more natural lighting and mirrors.

The empirical evidence reveals that the PS is not leveraging on providing a fitting room to enhance the CE. Simple changes in the areas of lighting, mirrors and general maintenance may create not just a place for someone to try on a garment but create a fitting room experience.

4.5 Customer Experience and the Level of Technology

In this section the second of the three pillars is reviewed. Three cornerstones are identified within this pillar: Technological Innovations within the PS, The Omni-Channel Experience and Leveraging on On-Line Purchases.

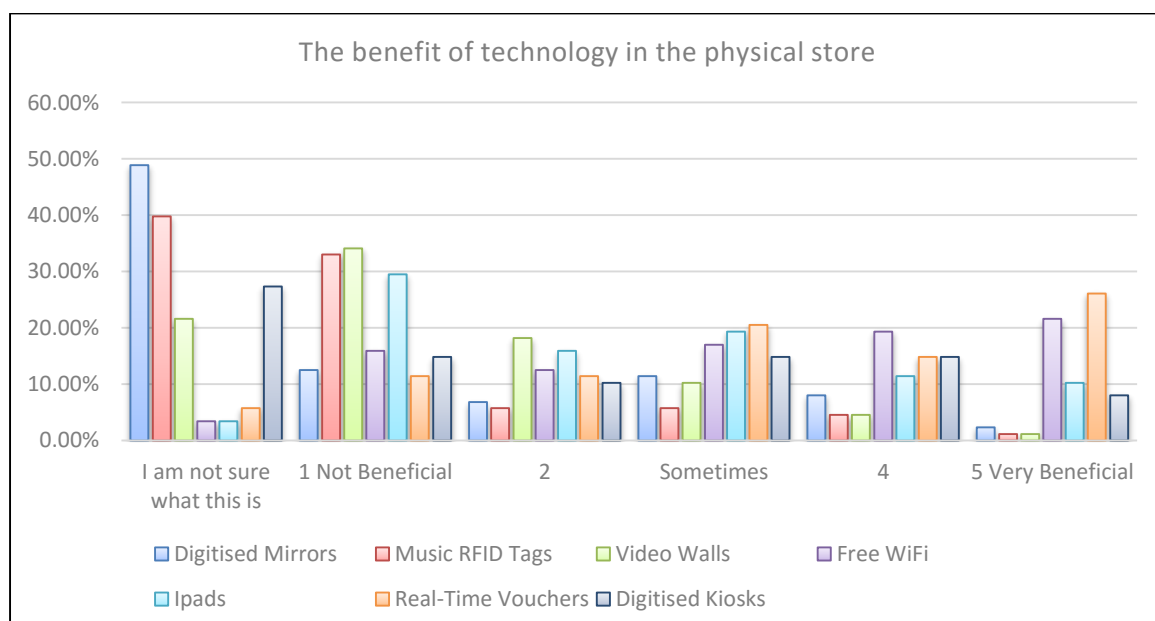
4.5.1 Technological Innovations in the Physical Store

Findings from the investigated literature show clothing retailers are looking for new technologies to integrate into their business model that will allow them to engage with the customer in different ways and remain customer focused (Chain Store Age, 2014).

Examples of such technologies integrated into the PS are: video walls, digitised mirrors, kiosks, instore Ipads, Wi-Fi access and music loaded onto RFID tags (Deloitte, 2011; Baker, 2012; Berman, 2012; Marks and Spencer, 2012 ; Retail Week 2012; Thomson, 2012; Minsker, 2014).

The results from the survey show that there is minimal awareness, among the respondents consulted, of the majority of these technological developments, in particular digitised mirrors, video walls, music loaded RFID tags and digitised kiosks. For those respondents who knew what these were, these technologies were not beneficial. The technologies that are the most beneficial are free Wi-Fi and real-time vouchers, as indicated in graph 17.

Graph 17. The benefit of technology in the physical store



The above outcome could possibly be to do with a direct correlation to the respondent's depth of knowledge. The setting in which the survey was conducted did not provide the opportunity to ensure there was a consistent depth of knowledge on each of the technologies where each could be demonstrated.

There was a similar lack of awareness of these technologies in the FG meeting. However, the FG setting provided the environment where the facilitator had the opportunity to describe the different technologies.

According to the FG, music loaded RFID is definitely not a benefit. Some thought that digitised mirrors may assist in matching garments and would possibly be of more benefit for the younger market who shop in e.g., New Look. The participants suggested that there is a cost attached to such technologies and did make a point that investment in digital enhancements in the PS may have an effect on the price of the garment. Other participants in the FG did not see a benefit of digitised mirrors in the PS and would much rather prefer they and their friends see the garment in the physical sense and not through digitised means. The general consensus within the FG is that any use of technology within retail should be simple and kept to a minimum to avoid confusion and information overload.

Piotrowicz (2012) suggests that the integrated customer experience across channels is through smartphones. Results from both the survey and the FG reveal free Wi-Fi and real-time vouchers to smartphones is a definite overall winner. PF3 described real-time vouchers delivered to smartphones as 'brilliant'. According to PF1 people want the vouchers when they are in the shop, not posted to the home address or emailed to be forgotten and not used.

4.5.2 The Omni-Channel Experience

As already established, there is a role for the PS; however, this role must be part of a multi-channel environment. Providing an omni-channel experience is identified as one of the cornerstones of the PS architecture. Both the empirical evidence and the investigated literature revealed an omni-channel experience allows the retailer to reach the remote customer (Thomson, 2012; Chapman, 2015). Some of the comments from Q5 of the survey show that for those who shop on-line, and get their parcel delivered to a convenient location, do so because the PS is too far away.

The results from the survey reveal that the customer is more likely to browse on-line first then visit the PS second. They are less likely to browse across channels when actually in a PS. When the respondent is in the PS they are more likely to purchase without any further research.

However, in the example of footwear, participants PM2 and PF6 in the FG, prefer to view in the PS first and then scan on-line second when in the PS to see if they can source the product cheaper.

4.5.3 Footfall Creation through Reserve-in-Store Initiatives

Whilst authors such as Berg (2014) and Clothing stores- quarterly update (2015) state that the PS is turning into a distribution hub through implementing a reserve-in-store option for those who shop on-line, the findings from the empirical research suggest that by offering this type of service does not mean that an organisation can leverage on an on-line purchase to create footfall in the PS. Findings from the survey reveal that for those who shop on-line, the majority prefer to get the product delivered to a convenient location as opposed to collect it from a PS. However, the opinions of those that answered the survey differ from the participants in the FG. According to PF1 the biggest factor that puts people off on-line shopping is the cost of delivery and the cost of returns so, if the option in Q5 of the survey of getting the product delivered to a convenient location had a cost of delivery attached to it, this may have presented a very different result. One that matched the opinions of PF1 in the preceding paragraph.

4.6 Customer Experience - The Organisation and the External Environment

This is the final of the 3 pillars and is an analysis of the external environment within which the PS is positioned. There are 2 cornerstones within this pillar.

4.6.1 The Town Centre as a Destination

One of the threats to the PS channel is the wide spread use of the internet that has resulted in fewer people who need to visit the town centre; people can work, shop, socialise, be entertained and educated from the home (Genecon LLP & Partners, 2011; Portas, 2011). This consequently has an impact on the opportunity for a PS to leverage on the footfall that would have historically passed through a town centre when on other business. According to Genecon LLP & Partners (2011), footfall can be measured by those passing through and those that choose the town centre as a destination.

Findings from Q7 of the survey reveal that the majority of respondents choose to select a particular destination to go and shop for their clothes as opposed to making a purchase when passing through on other errands. These results are shown in graph 18.

Graph 18. When people buy clothes in a town centre



These findings suggest that footfall has to be created through providing a destination that people will choose to visit and not one that relies on those who are just passing through.

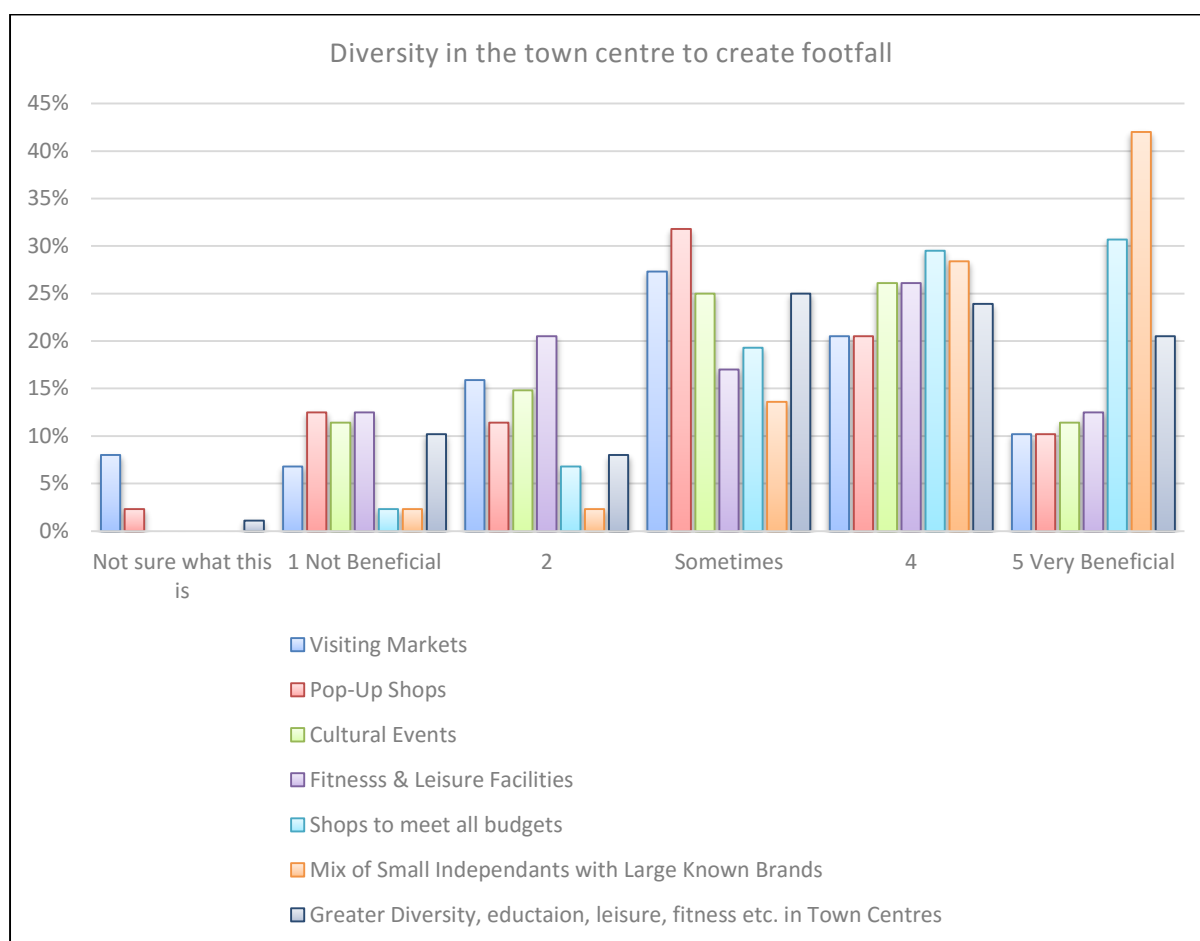
The other factor that detracts footfall from the town centre is poor infrastructure that hinders access. Findings from both the investigated literature and the empirical research reveal that poor infrastructure and insufficient and costly parking facilities have hindered access to a PS that is positioned in a Town Centre (Genecon LLP & Partners, 2011).

4.6.2 Diversity in the Town Centre

According to Porter & Kramer (2011) the success of a PS is not only attributed to the activities directly linked to the internal operations of the organisation. There is also the wider network to consider and the external area that surrounds the PS.

Findings from the survey reveal that the respondents would like to see a shopping destination that has a mix of small independents with large known brands, shops to meet all budgets, a mix of schools and universities, and leisure and fitness facilities amongst clothing. These results are shown in graph 19.

Graph 19. Diversity in the town centre to create footfall



According to the FG, town centres mostly consist of the same shops and are therefore boring. This is not just in British town centres, but also globally, with well-known high street retailers such as Marks and Spencer and H&M positioned similarly in Spain. A number of authors share the same opinion and suggest there is a lack of strategic planning in the development of a town centre. This is a shopping destination that has evolved from markets and through time have allowed shops to pop up with no thought behind the retail mix (De Kare-Silver, 2011; Genecon LLP & Partners, 2011; Portas, 2011). This scenario creates a fragmented approach to town management where there is no consideration towards the USP or branding that is in tune with the localised area (De Kare-Silver, 2011; Genecon LLP & Partners, 2011; Portas, 2011). Baker (2012) is of the opinion to leverage on the tourist trade, to create an environment which the on-line channel cannot. According to Centre for Retail Research (2015) the regions that will have fewer shop closures are those that are known for their tourism. Some cities are developing plans in implementing such strategies (Dawson, 2015).

The FG gave examples of cities that in their opinion provide a shopping experience, these include Chester, Cardiff, and Bricklane and Shoreditch in London. The FG opinion is that

these areas offer diversity in the form of culture, areas to relax, and a varied mix of retail outlets. Whilst tourism was not discussed in the FG, the success factor of these areas could arguably be related to the USP of the local area and level of tourism.

Discussions in the FG also revealed that certain times of year offer diversity. PM2 commented on visiting markets and Christmas lights that offer diversity which not only draws him into the town centre but creates an environment where he would look at different things and perhaps go into more shops than usual.

5 CONCLUSIONS

5.1 Introduction

Following the analytical interpretation of the results, this chapter offers the central conclusion to this research. The conditions in which the research was conducted do not allow for any generalisations to be made about the whole population. This research was the first step in exploring, in view of other distribution channels, if the physical store, (PS), within the context of clothing retail is a valuable asset. The research was also to determine the cornerstones within the PS architecture to help sustain competitive advantage and strategic growth. The conclusion draws on both the investigated literature and the empirical research.

An evaluation of the main concept, and the conclusion of the research, revealed that the PS is a valuable asset; however, not as a stand-alone entity but as part of a multi-channel retail enterprise. In addition, with the on-line channel offering the customer a new experience in retail, the role of the PS channel must change to engage with the customer in new ways.

Clothing can scarcely be differentiated through the product, but, rather, through offering the customer an experience. Clothing is a buyer-driven commodity (Abecassis-Moedas, 2006) placing the customer central to the success of a retail organisation. For this reason, the overarching theme for the pillars within the PS architecture was the Customer Experience (CE). CE encompasses all of the three pillars within the PS architecture: 'CE within the PS', 'CE and the level of technology', and 'CE-The organisation and the external environment'. Within each of these pillars are the cornerstones that will help to sustain competitive advantage and sustainable strategic growth. These cornerstones cover the areas of: staff; the senses ;a showroom strategy; displays; the fitting room experience ; technological innovations; the omni-channel experience; leveraging on e-tailing purchases; the town centre as a destination; diversity in the town centre. The pillars and their corresponding cornerstones can be viewed in Figure 1 section 1.7. These are used as the main framework for the results and analysis and the conclusion to this research.

5.2 The Physical Store as a Valuable Asset

Changes in retail have been driven by the introduction and growth of the internet, the implementation of broadband, and the emergence of an on-line shopping channel (Thomson, 2012). These new digital offerings have changed customer expectations (Berman, 2012). An experience in one channel raises the expectations in another (Berman, 2012). The on-line channel has offered the customer a new experience in how to browse, purchase and communicate via a digital platform. This was an environment that uses technological developments to find new ways to engage with the customer (Thomson, 2012).

The traditional retailer with PS presence has lagged behind. But with the emergence of digital retail they must review their customer value propositions and ensure that they have the right level of technology at the right time. They must ensure that the PS is positioned in a shopping destination people want to visit: and they must offer an enhanced CE when the customer is in the store.

What was clear from the empirical research and the investigated literature was that the PS was a valuable asset. However it is no longer a stand-alone bricks and mortar operation. For the PS to have a sustainable future, changes need to be made. Not all of these changes are necessarily through the implementation of new digital innovations. The empirical evidence also suggests engaging with the customer through making better use of what already exists within the traditional PS channel.

5.3 Customer Experience in the Physical Store

As already stated in the introduction, the empirical evidence suggests engaging with the customer through leveraging on existing traditional methods of retail. The first one of these was the effect staff have on the CE. The area of staff superseded all other discussions in the focus group, (FG), and therefore could be described as the fundamental cornerstone for change in the PS architecture within a multi-channel retail environment to help sustain competitive advantage.

Wellington (2010) and Investment Weekly News (2012) suggest that, with products becoming less distinguishable, the only way an organisation can differentiate itself from the competitor was through the customer service it provides. The empirical research clearly revealed that service from staff in a PS was poor and that this poor service was linked to factors such as, a lack of training, not enough incentives and substandard working conditions.

The second area is the sensory elements. Whilst experiential retailing encompasses a variety of senses, the senses that stood out in this research are those of sight and touch. The main strength the PS has that differentiates this channel from any other is the sensory elements, particularly those of sight and touch. Both the empirical evidence and investigated literature revealed that people like to feel and see the garments in the PS. As reviewed in section 2.2, these senses are a threat to the on-line channel and one of the reasons for a slow take-up in internet use for the retail of this product type (De Kare-Silver, 2011).

There are, however, differing opinions on the sense of sound and the influence of music. Whilst authors such as Ogben- Barnes & Barclay (2012) suggest that the sense of sound and the influence of music was of particular relevance to fashion retail, empirical evidence

reveals otherwise. The survey revealed that the majority of respondents do not find that music adds to the shopping experience.

The sense of sight and touch was also related to how a product was displayed. The empirical evidence revealed that, in some cases, complete outfits can be purchased based on effective use of displays. However, the displays need to represent reality, with minimal distortion. According to the empirical research clothing retailers use mannequins and real-life professional models that do not represent the true shape of the end user. The display must be true to what the product will look like on a person.

Another area where the garment is displayed is in the fitting room. This is when the garment is fitted on the actual person who is going to wear the product. The fitting rooms must have natural lighting, be spacious and have back-and-front view full-length mirrors. Similar to mannequins and professional models, the mirrors and lighting should not be of a standard that reflects a distorted image of the customer. In addition the fitting room area should be well maintained with simple attention to detail. As one participant stated, 'even replacing curtain hooks would be a start'. Linking this area with the issue of staff, it is important to position well-trained, incentivised staff in the fitting room, as this is the area that is arguably the last stage before the customer makes a decision on whether to purchase an item.

While, throughout, a number of authors suggest that the PS should be more of a showroom with less stock, that the PS could be an area to use theatricals to showcase a garment, the empirical evidence suggested otherwise. The customer would prefer the stock was available in the store, not only display purposes, but also to purchase. Jeanswear was a clothing product that would particularly benefit from being showcased in one area of the store and not dispersed across different sections and concessionary areas.

5.4 Customer Experience and the Level of Technology

Berman (2012) suggests reshaping an organisation's customer value propositions and transforming their operations using the digital resources available, to provide greater customer interaction and collaboration. According to Brown (1999) to ensure strategic customer care, the organisation must select the right level of technology and the appropriate time to implement it.

The empirical evidence reveals that the level of technology should be kept as simple as possible, or there was the danger of providing too much information that results in a customer who is confused. Technology in the form of video walls, kiosks, digitised mirrors and music loaded RFID's in a PS were less favoured in this channel. The main digital resources for greater customer interaction and collaboration are providing an omni-channel

experience; free Wi-Fi; and the delivery of real-time vouchers to smartphones. This was of the same view as Marketing Weekly News (2014) who suggest connecting the in-store experience with omni-channel capabilities, and Piotrowicz (2012) who states that an integrated customer experience across channels is best delivered through a smartphone.

With the exception of footwear, the customer does not shop across channels once in a PS. The empirical research revealed that movement across channels was seen more in the case of researching on-line before visiting the PS. Those that went directly to a PS would not use any other channel in the purchasing journey.

Some of the investigated literature stated that retailers with a PS presence are operating their stores more as a distribution hub with collect-from-store initiatives for on-line purchases. However, the empirical research revealed that the PS cannot leverage on these on-line purchases to create footfall in their stores. For those who purchase on-line there was a preference to get the product delivered to a convenient location.

5.5 Customer Experience – The Organisation and the External Environment

The empirical research revealed that people go and shop for clothes as an organised trip more than an impulse purchase. Customers want: diversity in the form of big brands and small independents to meet all budgets; shops in one location that are easily covered in one day; an area ideal for browsing where shopping is an event rather than a task; a nice environment to stop for lunch with an area to relax; and an environment that incorporates culture, leisure, universities, schools and libraries, pop-up shops and visiting markets into the mix. Cardiff, Chester, Shoreditch and Bricklane area of London were mentioned as ideal shopping locations. Town centres have become boring, offering the same brands not just across the nation but on a global scale. Not only this, but, access to the town centre has become laborious and costly.

6 RECOMMENDATIONS

This section will deliver the final objective of this research and will recommend the application of the cornerstones identified in the PS architecture to achieve competitive advantage and sustainable strategic growth, and recommend future research.

These recommendations comprise mainly the application of Porter's value chain through identifying the discrete value activities for competitive advantage. Porter's Value Chain is described in section 2.4.

6.1 Invest in the Staff

It is recommended that the PS leverage on the area that an on-line channel cannot, and that is face-to-face communications. The author recommends leveraging on the staff within the PS to enhance the customer experience (CE) by creating a link in the value chain between the Human Resource (HR) activity and the PS activity. The aim of such a link is to provide a discrete value activity that is based on an organised and facilitated staff training and development programme. A retailer that competes on cost should have a very different training programme from those which compete on focused differentiation. It is therefore recommended that this programme should be in-line with the retailers' competitive strategy.

Staff who work in the PS are at the forefront of the CE and represent the organisation that they work for. It is recommended that an organisation leverage on the uniqueness that people in an organisation can provide and encourages the staff to have a voice, allowing them to knowingly, and/or anonymously, feed-back on an organisation's operations. This can be as simple as placing anonymous post-it notes on the manager's door or encouraging an open door policy where staff can discuss, with confidence, possible opportunities for improvement, or alternatively, what is operating well. The author suggests recruiting store leaders who encourage this type of culture. These leaders would possess the attributes of good communication, enthusiasm, effective delegation, integrity, intuition, inspiration, and be drivers for innovation and continuous improvement.

There is also the opportunity to leverage on the appearance of staff in clothing retail. It is recommended that staff who work for branded retailers wear the current merchandise to endorse the brand. However, for the large department stores better care and attention could be paid to staff uniform, particularly for those who work in the fashion areas of the store. The author recommends that the PS leverage on uniforms and provide suitable clothing that is in keeping with the brand message. This may mean a uniform that is based on the same theme. However, it is also important that the design and fit suits the member of staff who is serving in a fashion department. This is not just from the perspective of staff appearance but

also to assist in making the staff feel good about themselves through wearing a garment that is the right fit, shape and colouring.

Staff can stagnate in their own areas of work and can be blind to what maybe others would see. Therefore it is recommended that a link is created between the PS and the infrastructure of the organisation in order to develop a discrete value activity that promotes a culture of openness and sharing best practices. This is a culture that can be achieved through moving staff around the different areas of the PS to either audit each other's workplace or work within the different workplaces as part of a cross-training and continuous improvement initiative. As part of staff training, a continuous improvement programme could expand to outside the clothing retail sector, through encouraging staff to have placements in other non-competitive industries where high performance in service and sales is important, e.g. car sales and Apple stores. This could make effective and efficient use of existing staff and reduce the danger of a stagnant environment.

This leads to the next recommendation: a) to promote retail as a career choice to become the employer of choice; b) to conduct further research in the area of employer branding for competitive advantage using literature from one of the identified leading writers in this area, Simon Barrow (Barrow & Mosley, 2005); and c) become the customer's choice of retailer.

6.2 Leverage on the Senses, Product Displays and the Fitting Room

Experience

The empirical evidence revealed that out of all the senses within experiential retailing, seeing and feeling the product in the PS is important. The literature also showed that to see and touch a product in a PS is the main strength of this channel. However, due to the nature of this particular research and a focus on the architecture of the PS and not just experiential retailing, it is recommended that further research is conducted that focuses on experiential retailing alone, by age ranges, product types, locations, SME and large retail corporations.

The empirical evidence revealed that it is important that what is on display should be available in the PS. The author therefore recommends that a discrete value activity is developed through creating a link between the PS, marketing, and the procurement activity. This discrete activity would involve the integration of these areas, (marketing, procurement and the PS), to ensure that stock arrives and is displayed and available to purchase in the PS in accordance to the organisation's marketing campaigns. This will require the implementation of effective and efficient SCM practices to ensure that in-line with the marketing campaigns, that, the procurement activity supplies the product to the PS, and the PS has the relevant product available to the customer in the PS.

Continuing on the topic of displays, the researcher recommends further research in the area of effective use of displays. Using both qualitative and quantitative research techniques, the researcher recommends a field study approach to the research. This field study will allow the participant to experience the different displays in the PS on a practical level. This will increase the participant's knowledge allowing them to make a more informed response to the questions asked within the study.

The author recommends that attention to detail is needed in the fitting rooms. The fitting room is arguably the last stage in the purchasing journey where the customer makes a final decision. For this reason well trained staff should be in this area. It is also recommended that there is simple attention to detail where there must be good housekeeping practices to ensure this area is well maintained.

6.3 Effective use of Technology

The PS can no longer compete as a stand-alone entity but needs to be part of a multi-channel retail enterprise. The author recommends that the on-line and the PS channel should complement each other rather than compete as separate business units. If the PS is analysed in isolation this may give a distorted view of its true value. Even if the sale does not occur in a PS, to measure the revenue created from only a PS could potentially lead to underestimating the true value of an asset that is generally deemed costly.

The author recommends that the same strategic planning is implemented across all channels. This can be achieved through creating a discrete value activity that links technology and the PS sales activity to provide an omni-channel experience that will deliver a coherent brand message and create a retail environment where the customer can move across channels with ease.

The empirical research revealed for those that order on-line the majority prefer the product to be delivered to a convenient location as opposed to collect it from the store. For this reason it is not recommended that on-line purchases are thought of as a means to create footfall in the PS.

The level of technology that enhanced the CE is free Wi-Fi and the delivery of real-time vouchers to smartphones. Further research is recommended with a field study approach to ascertain the level of technology required within a PS to engage with the customer and enhance the CE. It is recommended that a link is created between the technology and the sales activity within the organisation to provide a discrete value activity that represents R&D, that is, a project dedicated to establishing the level of technology that assists the customer in the decision making process.

6.4 The External Environment and the Wider Network

The author recommends a link between the organisation infrastructure, HR and the PS activity to create a task team within the organisation that will represent the retailer within the wider network. This task team will work with competitors, local government, tourist boards and other sectors as part of the drive to create a destination people want to visit.

An organisation should avoid creating a PS that is a one-size-fits-all experience for the customer. Instead organisations should work with local government for an informed approach to what is going on in the local area where the PS is positioned, understand the unique selling point (USP) of the district, and work with local tourism organisations and with other businesses in the surrounding areas. The aim is to provide the public with an enriched and wider retail experience and attract footfall.

It is recommended that this task team also has close links to those who work within the local tourist sector. According to Centre for Retail Research (2015) and Baker (2012) the regions that will have less of an impact on shop closures are those that are known for their tourism. To provide an environment which the on-line channel cannot, tourism can be used as a central theme when creating or reviewing a shopping area.

The recommendations made in this section provide the opportunity for those who work in the clothing industry and business generally:

- (i) To gain knowledge of the surrounding infrastructure the PS
- (ii) To be involved in initiatives to cluster similar products in order to complement rather than compete, offering the customer more choice through putting similar product types within close proximity to each other.
- (iii) To create footfall and variety through involving other sectors, e.g. gyms, near sports retailers, boutiques and well-known brands for all budgets, mixed with restaurants, cafes and green areas for relaxing.
- (iv) To offer their own knowledge.

6.5 Opportunities for Future Research

This was a study that encompassed all the product types within fashion. Further research is recommended using a scientific approach adopting Q3 and Q4 of the survey in this research, to provide a quantitative analysis to identify whether the PS is a valuable asset, by product type, split by gender and age range. The suggested product types are: Jeanswear, footwear, casual, smart wear, occasion wear, bags, jewellery and other accessories e.g. sunglasses etc.

The design of this research only included the administration of one survey and one focus group, (FG), meeting within a sample framework where generalisations could not be made about the wider population. The researcher recommends that this dissertation is viewed as a platform from which to extract certain pieces of information that can be used for further research. This further research is to be inclusive of both a statistical nature using a probability sample for quantitative analysis, or in the case of qualitative research, using a non-probability sample with a number of FG meetings with the objective of collating information to a level where the topic has been fully explored (Saunders & Lewis, 2012).

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8 APPENDICES

Appendix 1: Focus Group Invitation & Information Letter

XXXXXXXXXX
XXXXX
05/01/15
Phone:xxxxx

Dear xxx,

I would like to invite you to take part in a focus group discussion. This is a small discussion group to be held on Saturday 21st February 2015 at 12.00 in xxxxxxxx. This will take no longer than 1.5 hours with food and beverages afterwards.

There has been much concern in recent years of the demise of the town centre with an increase in vacant commercial properties and the rapid growth in browsing and shopping on-line. The discussion is about the need for a physical store in clothing within a multi-channel enterprise. There will be 6 discussion points within the topic that I would like to cover that address the different elements of shopping in the physical store; these are the displays, staff, fitting rooms, other facilities and the general experience. The results of this questionnaire will hopefully enhance my understanding of the physical store architecture and will be stored on an encrypted file. There is no need for you to prepare anything, just turn up, relax and look forward to food and drink afterwards!

The purpose of the focus group is to gather data on the above topic. The data collected from the discussions will be used for my Masters qualification that I am doing at the University of Wales Trinity Saint David. The focus group content and discussions will be confidential and all participants will remain anonymous. To ensure that all the discussions are captured for analysis they will be audio recorded. There will also be a short consent form to sign on your arrival. An example of the consent form is at the end of this letter and I will have this printed and ready for you. There will be no more than 10 participants consisting of people you may know and others.

I would also like to take the opportunity of using the focus group to test the survey element of my research. In advance of the focus group meeting I would be grateful if you would be so kind to complete two questionnaires that will take no longer than 5 minutes each. These have already been sent to you in the week leading up to the focus group via Facebook or email. This would greatly assist me as part of the preparatory stages of the questionnaire

element of my research and also it will be a good warm up towards the focus group discussions.

Your participation in this study is completely voluntary, you can withdraw from the questionnaire at any stage.

I thank you in advance for your time and participation. If any questions do arise, feel free to contact me at your convenience.

I look forward to seeing you soon.

Thank-you,

xxxxx

Appendix 2: Focus Group Participants Profile

To ensure complete anonymity of those who attended the FG, the participants were referenced as P for participant, F or M for female and male followed by a number 1 to 8; a number that was allocated based on which pre-numbered chair they selected to sit on. Together all three created participants' codes consisting of: PF1, PM2, PF3, PM4, PF5, PF6, PF7 and PF8.

Three of the participants were experts in the field; PF8 had a manufacturing background spanning 40+ years, PF3 is a partner in an on-line clothing store and PF7 had 20 years' experience as a fashion buyer for a major high street department store. The facilitator, (the author), is also an expert in the field and has been in the clothing industry covering a considerable variety of roles spanning 20 years.

Appendix 3: Focus Group Discussion Guidelines

Introduction

Thank-you all for volunteering to participate in this focus group. This research is really important to me and I hope you will enjoy the topic and discussions as much as I will. You may have noticed that each chair has a piece of paper stating respondent 1, 2 etc., this is to ensure confidentiality, it is not always possible but if you could try not to say anybody's name. At the end of the session if you could remove this piece of paper and write your age on it and hand it back to me that would be great. The information will only be used for my research towards a Masters qualification. To allow me to facilitate effectively without having to take notes or memorise what has been said, the session will be audio recorded.

Specify Rules

The focus group is confidential therefore if we could all respect one another's opinions even if you do not agree with them. There is no wrong or right answers or any answers better or worse than others. This is an open forum and it is important to me that you all feel relaxed and comfortable to speak how you feel about the topic, and that your answers are only shaped by others if that is what you genuinely agree and feel.

Only one person is to speak at a time and not to talk over each other. Everyone will have an opportunity to take part in the discussion. It is important for me that everyone here has an opportunity to speak even if it is just simply agreeing with other comments.

The plan is to have a break after each question to allow us to recap on what has been said and to allow for clarity and understanding to be confirmed.

Break the Ice

Before we start to get into what I am hoping will be some rich discussions on the research topic, we will have a moment of brief introductions; some of us know each other but I would still like us all to introduce each other, who we are and how you know me and any other persons in the group.

The Interview

Cast your mind back to different experiences you have had in the physical store when buying clothing. Try and think of not just experiences in the localised area but also outside of this district. For example, London, Cardiff, Bath etc. The following questions are going to cover topics such as customer service, fitting rooms, the displays and technology.

I will start with a highly structured question to gauge what the overarching opinions are in the group.

Question 1 (Preferred Method to Shop)

Do you prefer to shop for clothes in the physical store, on-line or both?

Question 2 (Staff)

How important is it to you to have face-to-face assistance in the physical store when purchasing clothing?

Prompts:

- a) In your opinion are staff of any value to you when shopping for a clothing? Why and How?
- b) What do you think their role should be?
- c) Would you like to see more interaction and knowledge from staff?

Question 3 (Fitting Rooms)

How important is it to you to be able to try a garment on in the shop?

Prompts:

- a) Is this a facility that is valuable to you when shopping in a physical store for clothing? Why?
- b) Is there anything a fitting room can offer that you do not get in your home environment that is important to you? For example added technology like music loaded RFID tags or digitised mirrors?

Question 4 (Displays)

Let us just think for a minute about all the displays that a physical store uses to showcase the garments. In your opinion are there any kind of displays that showcase the garments you feel add value to your shopping experience?

Prompts:

- a) Do they inspire you to browse and shop? Why?
- b) Can you think of any other type of displays that you would like to see more of in a physical store? Maybe it is something you read or a friend has told you about or there is already some in a store but you would like to see more.

Question 5 (Favourite retailers)

Which retailers positioned in a city or town centre would you list as your favourite?

Prompt:

- a) Can you describe why these are particularly your favourite?

Question 6 (The experience)

What is the perfect shopping experience in a physical store?

Prompts:

- a) What motivates you to shop for clothing in a physical store? For e.g. is it a day out with family friends, you are on vacation and have the time, the draw from visiting markets, events going on, pop-up shops, in town anyway?
- b) How important is technology when shopping.....does augmented fitting rooms, video walls, music driven RFID tags, the availability of Ipads, free Wi-Fi with real time vouchers of importance and inspire you
- c) Is it important to you to be amongst the sensory aspects of feel and see the garment, smell and sound (the music)?

Closure

Thank you very much for your time it really has been valid and enlightening. I am going to come to an end and start to close the discussion group. Are there any questions anyone wants to ask me, is there anyone who wants to clarify or change anything from the discussions.

Appendix 4: Matrix Analysis

The structure of the following Matrix is in keeping with the 3 pillars and cornerstones used to develop the PS architecture. The themes have derived from a combination of, what was found in the literature, the discussion guideline questions, and topics that arose from the discussions within the FG.

The following is written in such a way that there is minimal alteration to the participant's spoken word.

THE PREFERRED CHANNEL	
The data for this theme came from the pilot test responses. This revealed that the respondents liked to shop across both or the PS.	
Participant	The Discussion
PF7	Really likes to shop in the PS Comments
PF1	The PS is here to stay The biggest thing that puts people off on-line shopping is the cost of delivery and returns; as long as that exists I don't think people are ever going to embrace on-line shopping where there is an extra cost.
PM4	The downside of on-line shopping is not being able to try it on and the hassle of returns. Also Fitting Room
PM2	He will sometimes go to the PS to look for a pair of trainers, try them on, but will then scan on-line to see if he can get them cheaper. Also omni channel experience
PF6	PF6 agrees with PM2 last statement and does that all the time when looking for London Fly Boots, she looks in the PS then makes the purchase on-line. Even if this is £20 cheaper, Amazon put little touches on the packages like a gift bow on the box. Also omni channel
PM4	PM4 asks the question if the group prefer the PS because the represented age range is over 20

INTERNAL OPERATIONS	
The Role of the Staff	
PF1	It is important to have someone available but I do not want the hard sell approach or someone to flatter me. Staff Role
PF7	I do not need someone to come and say that looks fabulous and upsell; that is intimidating; however the presence of staff is important. Staff Role
PF1	It is important that someone is available for you to ask questions Staff Role
PF7	To get your size perhaps and to get another colour. I want them to be knowledgeable about the products that they sell. Staff Role
PM2	Staff are definitely important in sports shops when picking running shoes. But other shop types also to match items e.g. shirt and ties. Staff Role
PF6	You want an assistant to help for e.g. when shopping for Jeanswear and advice if the cut is right or wrong, find the right pair of jeans. I need advice on fit due to medical problems e.g. how low and high the waist is and the better fit for my size. I feel I do get this service if I go to the same shop. I know which shops suit my style now, this means I can also order them on-line if they do not have them in the PS. Staff Role
PF1	Older women want to spend more while younger people want disposable fashion. Older women are prepared to spend a bit more for something therefore the staff have got to work harder to sell it to them. The experience to be more pleasurable because they spend more money.
PF5	(Critical Incident) Some stores have dedicated personal shoppers – Perhaps make the staff personal shoppers. It was a Christmas Present in House of Fraser, and was described as poor. Height, eye and hair colour, and preferred colours were sent to the store as requested in advance of the appointment. On the day the room was nice and spacious however they appeared to get the hair colouring wrong and produced a rack of creams and browns that is not for me. I like bright

	colours, I had a bright top on at the time. The personal shopper was off sick so I had someone from the shop floor. I had been there early and had a browse round the shop, it was a case of just telling her what I saw in the shop and she went and got it.
The Level of Knowledge on where a Product is Sourced	
PF7	Staff knowledge on where the product is sourced is important but it depends on the where you shop. If you buy in Primark you are stupid if you think the worker has been given a decent price; however further upmarket like All Saints, not that All Saints are not capable of the Primark scenario, but you want to know where it is made and confident as an employee that it is ethically sourced
PM2	If you are paying for a suit say in Hugo Boss and paying a lot of money for it, I would like to know where the money going.
PF5	I don't even think about ethics
PF8	When garments where started to be made abroad everyone was losing their job and I felt I was not going to buy in Marks and Spencer but since this has all died down I do not think about it.
The Influence on what the Staff wear: Staff Uniform	
PF1	Yes occasionally e.g. Monsoon
PF7	It depends on the store sometimes you don't want to see the staff wearing the clothes other times you do. Fancy boutiques should wear the merchandise. M&S in Marble Arch uniform is undesirable for working in the fashion department and suggested in this environment nothing more is needed that a nice pair of black trousers and a blouse.
PM4	I like Timberland, the staff wear the merchandise and are therefore able to better advise because they are wearing the product.
PF7	I think it endorses the brand, individual brands like Timberland, Reece or smaller brands, it is essential for them to wear the stuff and the M&S and Debenhams of this world could have more of a generic uniform but one that is still a nice quality smart outfit.
PF6	You need to know who you can approach in the bigger stores. When you go into Superdry you know who is working there, there is only about 10 staff and they are folding shirts. If you went into Debenhams or M&S you would not have a clue who to ask if they did not have a distinctive uniform on.
PF7	They could have a badge on a nice green cotton shirt.

PM4	Branding is important, the strength of the brand, display of the logo e.g. Timberland. This is not required for shops like Primark where the price tag is more important
Conclusion	Boutiques must wear the merchandise. Department stores must have a flattering generic uniform that complements the fashion department.
Staff Working Conditions	
PF6	I don't think staff are very well paid, are on limited contracted hours, and are there to do their job and get out. Why should they learn about the garments when they get paid pittance. They are seasonal staff.
PF8	I think they need to invest more in wages and staff training; making retail an attractive career
PF3	I do think staff are undervalued, should be trained better to give a better shopping experience. If retail does not spend the money on training staff then the retail experience is not good enough.
PM2	Would you say training or more incentives?
PF3	A bit of both really, make them valued and part of the company at least they get more incentive to sell well if training motivates them more and they understand the product.
PF1	Staff feel disposable these days, they know if they do not want to do it there are 20 more people who do so the retailer does not need to give them the respect.
PF8	Most of the time they have only got a 16 hour a week and a 6 month contract
PM4	They are students that are really only there while they study for a career.
PF8	They know at the end of the day they are going to go. They are marking their time really
PM2	Just there to earn a bit of money
PF1	The John Lewis staff incentive definitely adds to the experience because they care, the store feeds ultimately back to them. They are ultimately going to benefit from the profit the store makes.
PF7	The John Lewis staff in Oxford Street have been around for years and are little old ladies who have not got a clue about fashion and can come across that you are hassling them; however, they are much better than what else there is around.
The Fitting Room & Technology Music Loaded RFID Tags & Digitised Mirrors	

PF1	Music I think would be irritating
PF5	A mirror definitely, music no
PM2	Has not heard of digitised mirrors and asked for an explanation
PF6	Emailing what the garment looked like to friends and sending a picture I think they still need to see it in the physical sense. The physical sense is better you get a feel for it, the bags and shoes to match.
PF5	I am hopeless at matching at least this will give you an idea of the look. I may not go for these exact items but it gives me an idea. However, augmented mirrors have an effect on the price of the clothing, they are not cheap I can imagine. Group strongly agreed with this comment.
PF3	Augmented mirrors are in places like New Look that target the younger market who tweet, Facebook each other and send to friends to get recommendations. This market is influenced and will not buy something unless their friends like it. This type of technology is for the younger group.
Conclusion	Technology will not enhance the fitting room experience
The Importance of having a Fitting Room in the PS	
PM4	This is the only reason I go the physical store; with my fit I find garments very rarely fit so I have to try them on first, I am an awkward shape so a fitting room is a must
PF6	It depends what you go in for, if it is work clothes and I have not got the time PF6 I pick a load up and go home to try on. If it is something specific like jeans or a dress to go out in I definitely have to try it on it depends on the time I have got and if I am bulk buying for work.
PM4	You can try on the exact same pair of jeans yet they both have a different fit so from that perspective it is important to have a fitting room but to buy in bulk try on at home and have the hassle of taking them back is too much hard work
PF5	Fitting rooms are small, you are confined to a space, the mirror is not good the lighting is not good. Much more comfort at home
Conclusion	The fitting room is an important aspect of the PS
Fitting Room versus Trying on at Home	
PF7	At home you have the right underwear on, shoes...ankle socks look terrible
PF5	if you do not have the right tights on you look awful

Conclusion	Your own accessories are available at home to mix and match the potential purchases with.
Fitting Room Requirements	
PF6	Lighting is a problem, sometimes too dim sometimes too bright, consistent lighting required, it can be ridiculously bright. Lighting needs to be more natural.
PF7	Full length mirror, spacious, good lighting, not tatty. Some stores like Debenhams are awful and so embarrassing; even just new curtain hooks. As a retailer you have got to invest in the physical and there is not enough of that.
PF5	The mirrors need to be a certain standard, some make you look slim and some not.
PM2	Bigger fitting rooms.
PF11	You are used to what u look like at home, that is your mirror and that is effectively what you look like. There are fitting rooms where you cannot see your back which is incredible because you can see what it is like from the front so you have to bring it home.
PF7	Sometimes I will buy something as therapy but then when I take it back home I look at it again and think do not need this and take it back In response to.
PM2	Do you mind me asking in your wardrobe do you still have items with tags on them
PF7	I do not have anything in my wardrobe with tags still on I wear all of my items
Conclusion	Whilst theme 3, 3.2 concluded that the fitting room is an important aspect of the PS, there is a considerable amount of dissatisfaction particularly with the mirrors and lighting.
Displays that Add Value	
PM2	I do not like shops like TK Maxx where everything is just thrown in and you have to root through every single one, however Superdry everything is on display in piles. This is much easier you may have models in the window and like the outfits they display.
PF6	Some places you go to and see the models and you think that is not bad
PM2	Ref video wall: I go round to look at clothes not a screen
PF5	They pin the garments to make them look like they are a better fit on the mannequins this is not indicative of a true fit e.g. Marks and Spencer

PF6	They should be natural the clothing should be as it is or you are deceived to the garment looking like something else
PF7	The mannequin itself is not real so they have to pin it back or else it will look like a sack.
PF6	get a real life mannequin then, a real life style mannequin like a person
PF5	I believe they did try this in Marks , Debenhams not sure
PF1	A more volumcious mannequin
PF7	Video wall....yes sportswear then you have a better idea.
PM2	PM2 I think that would be good but they must have the item in the store and if it is in the store you need to be told where in the store. Going back to the mannequins sometimes you look at the display and say that is nice sometimes it looks horrible and ask why have they done that, however, you may buy all 4 items instead of perhaps the one you were going to buy
PF5	I have done that before and bought the whole outfit if that had not been there I would not have bought the whole lot
PM4	That is funny as I have never looked at a mannequin and say I am going to buy that I ignore them. Not even a shop window it is the brand that influences me that is what I am sold on, Howie's, Timberland I would buy it as a fashion statement that you are buying that clothing rather than I just like a t-shirt
PM2	You are used to going into your normal stores that you would go into and don't tend to look at the window just go straight in and upstairs to the men's, women obviously different and they go and have a look around.
PF5	I hate sales when everything is together and TK Maxx especially in large dept. stores, if I am looking for jeans for example I want the jeans=s to be close together I know this is not possible with concessions. I want the jeans to be together instead of going round different concessions.
PM2	if you go to a Next sale they tend to bring out previous 2 years fashion which I do not want what I needed to come to a conclusion
PF7	Video walls - Sports shops yes but I could just flick through them. I needed someone to discuss with me. Nike have video walls for trainers. Whatever type of signage video wall it has to be kept to a minimum otherwise there is a danger of brain overload and mass confusion.

PF3	I don't mind TK Maxx but then it is down to time some people are more pressured for time which I understand, I like to buy one offs and things that are different, if I saw something on a mannequin or a window I would not wear it because someone might recognise it is from the window display, mannequins in shop windows do not entice me.
PF5	Video walls would have to show normal women not skinny models
PF6	Not 6ft tall
PF7	Like M&S real life women campaign with real women in a fashion show. All the skin companies that have used real women and that has worked, clothing has been slow to catch

THE LEVEL OF TECHNOLOGY	
Real-Time Vouchers Delivered to a Smart Phone	
PF3	Brilliant
PF6	Boots was used as a really good model, using the app when you go to the store to retrieve vouchers, they send you emails letting you know you have new ones uploaded.
PF1	Marks and Spencer's sending me vouchers and I forget they are or leave them in the house and then I am in Marks and Spencer. If they would just, they know when you are in there they could pick you up on their Wi-Fi and whatever just send you a voucher while you are there I think that would so incentivise people so much to shop you know pops up on your phone 10% off
Conclusion: This is a very brief table. This group are less enamoured of new technological innovations by which to engage with the customer through video walls, music loaded RFID tags, kiosks, Ipads, as this may provide too much information, however, they really did like the idea of receiving real-time vouchers to smartphones.	

THE EXTERNAL ENVIRONMENT	
PF1	Decent choice that is doable in a day
PM2	When you are in town around Christmas Time you have all the lights up, wooden huts, I like the experience and looking at different things and maybe going into shops more than normal In response to 1 I find that the problem these out of town places there are too many people and you never get a chance to look for clothes you want anyway.
PF3	I would rather go to Cardiff have lunch and browse round different things there is so much more variety than Swansea
PM4	I like the physical shop but I do not like going into the city centre because I find it a hassle trying to find somewhere to park the car that is a major factor for me, I tend to go out of town. I usually have a plan of where I want to go especially if I have children nothing worse than dragging round the shops and coming back with nothing. 1 I always find the day will be good or bad depending on how many people are there.
PF8	parking is a big factor you can pay a fortune to park in town if you want to shop all day while with out of town it is free
PF5	Chester because of it is a beautiful city so even though it is a day out the atmosphere there is lovely, nice cafes for you to have lunch, oldy worldly. It is not just Britain you also have Spain, M&S are out there
PF8	H&M
PF6	It is the preparation, to feel good about yourself to go into town to shop properly. Sometimes I take longer to get ready if I am going shopping and that I haven't got the children, things like that change the mood. Any high street you go into in Britain it is the same, it is the whole modernisation of the high street. It is not just Britain you also have Spain, M&S are out there It gets boring. I would like to consider and go to niche areas like Brick Lane and Shoreditch and all those kind of trendy areas in terms of finding something different more interesting than the West End.

Favourite Retailers	
PF1	John Lewis
PM2	Superdry
PF3	TK Maxx
PM4	Timberland because I find things that fit me, and Howie's because they are small Welsh independent brand and I like their branding but I very rarely buy stuff from there as it is a bit expensive
PF5	No particular one but if I had to choose it would be House of Fraser, Debenhams, Boden on-line, Next not so much because everyone wears stuff from Next and it is therefore distinguishable, Next for kids maybe, department stores are my real choice.
PF6	Superdry, Diesel. Diesel because of the fit
PF7	Joules, Selfridges, Cos an offshoot of H&M. Cos is probably my favourite independent individual brand in terms of very easy styling easy fit and not overdesigned and then it is just about individual brands like brand names that I would buy or look on-line but Cos is my no 1 affordable as well as not super expensive
PF8	I shop anywhere whether it is Debenhams, Asda, Tesco's it does not bother me if it suits me I will buy it

Appendix 5: Feedback Questions for the Pilot Survey

Thank you for participating in my survey. This is a feedback survey on the pilot that consists of 6 questions in total that will take only a few minutes to complete. Your feedback is important and will be used by the researcher to make any necessary adjustments to the pilot survey before it will go live[u2].

Please read through this questionnaire once before commencing with the pilot survey. After the pilot survey is completed could you please complete this survey with your feedback.

Q1 Please select from the list below how many minutes it took you to complete the pilot survey.

Q2 Please select from the list below those questions that were not clear.

Q3 Please select from the list below those questions that made you feel uneasy

Q4 In your opinion were there any topic errors?

Q5 Was the layout of the survey clear and attractive?

Q6 Please enter any additional comments applicable to the design and content of the survey that is not included in this feedback survey.

Appendix 6: Survey Questions

Thank you for participating in the survey.

There are 10 questions in the survey that will only take a few minutes to complete. This survey applies to only those that are older than 18 years of age.

The purpose of the survey is to determine if there is a need for a physical store for the retail of clothing. A physical store is a bricks and mortar building that is positioned in a city or town centre.

This survey is part of student research for a Masters qualification. All of the responses will be treated anonymously and your feedback is important.

Thank-you in advance.

1. What is your gender?
2. What is your Age Range?
3. When looking for a new item of clothing to wear do you prefer to browse
In a physical store; On-line; Both
4. Do you prefer to make a purchase
In a physical store; On-line; Both
5. When you shop on-line, please select your preferred delivery option from the dropdown list below. More than one option can be selected.
I do not shop for clothing on-line; No preference; Collect from store; Delivered to a convenient location; Other. Please give a reason for your answer in the comments box below or leave blank.
6. Please specify your top favourite clothing retailers. Leave blank if you do not have any.
1st favourite; 2nd favourite; 3rd favourite
7. When do you mostly buy your clothes in a physical store? More than one option can be selected.

I do not buy clothing in a physical store; an impulse purchase when in the town centre for other errands; a specific shopping trip to buy clothes; other.

8. Please answer the following statements with regards to shopping for clothing in a physical store.

(Each of the statements has an option of No, Sometimes and Yes)

I like the sensory aspects of seeing and feeling the garment in the physical store

The displays in the physical store inspire me to make a purchase

I think music adds to the shopping experience

The staff inspire me with what they wear

I find the staff help me in making a decision on what to buy

I like the experience of the fitting room in the physical store

I usually see the garment on-line first and then go into a physical store to view

I like to view the garment in the physical store first and then purchase on-line

Please rate: Would the following be of benefit to you as part of your shopping experience if positioned in a physical store

(Each of the initiatives below can be rated as follows:

I do not know what this is 1 not beneficial, 2, 3, 4, and 5 very beneficial)

Digitised mirrors

Music loaded onto RFID tags

Video Walls

Product related activities e.g. table-tennis in a sports shop

Limited one off products

Free Wi-Fi

The use of Ipads

Digitised kiosks

Real time vouchers sent to your smartphone

9. Please rate how beneficial you think the following would be if positioned in a town centre in creating footfall for a clothing retailer with a physical store presence.

(Each of the options below is rated as follows: I am not sure what this is, 1 not beneficial, 2, 3, 4, 5 very beneficial)

Visiting Markets

Pop-up Shops

Cultural Events

Fitness and Leisure Facilities

All types of shops to meet all budgets

A good mix of small independents amongst the large known brands^[U3]

Education: Libraries', Schools, Colleges and University

Appendix 7: Extracts from the Focus Group Audio Transcript

The following is written in such a way that there is minimal alteration to the participant's spoken word.

Facilitator: How important is it for you to have face-to-face assistance in the physical store when you are buying clothing? What value do they give when you are shopping?

PF1: I think it is important for someone to be available but I do not want anyone to talk me into buying something or flatter me.

PF1: I think it is important that someone is available for you to ask questions....

PF7: and to get your size perhaps. Does this come in another colour and yes you want them to be knowledgeable about the products that they sell but I agree with PF1 in terms of you don't want someone who will come and say, 'that looks fabulous', and come and upsell and do that all the time. That can be quite intimidating; but I think the presence of staff is important.

Facilitator: With regards to transparency and ethics, do you feel that the staff need to know where the garments are sourced?

PF7: I think so. It depends, I think it depends on how much you pay for something because I think if you buy in Primark and you are buying a t-shirt for £3 and well you are stupid if you think that the worker has got a decent price for that, but if you are in you know I don't know All Saints or somewhere and I am not saying they are not guilty of what's the Primark scenario you want to kind of know where this has been made. Are you confident that your company, your employer, doesn't actually employ sort of slave labour for want of another expression.

PM2: I think you are absolutely right. If you look at some suits or something like that I don't know say Hugo Boss, Armani you are paying a lot of money for it, it's like where is that money going?

PF5: I don't think I would have thought of it to be honest

Facilitator: How important is it that you are able to try a garment on in the store?

PM4: It is the only reason I go to the store. I very rarely find anything that fits so I have to try it on to find whether it can be shortened. I am quite an awkward shape so I very rarely find anything. I got to try it on, I cannot just buy it, I got to see if it fits in the fitting room, the fitting room is a must.

PF6: Sometimes it depends what you are going in for, sometimes I go in for work clothes and I have not got the time

Facilitator: Can you think of any other type of displays that would or would not inspire you?

PF7 You could do something like a M&S real women life campaign, a fashion show with real women in it. It doesn't have to be a catwalk. Think of all the skin companies that have done this sort of campaigns for older women, it has really worked hasn't it? Clothing I think are a bit slow to catch on there. It is not just about older women it is young women as well, suiting everyone different body shapes

PF7 I think whatever kind of what do you call it signage video wall it has got to be kept to a minimum because otherwise I think now we are in danger of having brain overload and out and about and oh god I am so confused

PM2 Coming back to the mannequins you sometimes do see a really nice display on a mannequin with a good choice of clothing that looks really good and other times you don't. If it looks nice I might buy all 4 things as opposed to just the one item.

PF5 I have done that before I have seen the mannequins, the whole outfit. If that had not been there I would not have bought the outfits.

Facilitator: I want to also talk about the external environment because to get to the physical store, what makes you go there, do you just go into town for that specific store, is there something else like a day out or are you on vacation, is it a draw from visiting markets, pop up shops (Bristol) where there is newness all the time?

PF1 It is choice I think, if you can get a decent choice in a reasonable doable in a day kind of area.

PF5 I like going to Chester because it is such a beautiful city, the atmosphere there is lovely nice cafes for you to have your lunch in, all that stuff as well. Oldy worldy

PM2 I think as well when you are in town around Christmas time you got all the lights up the wooden huts. I actually quite like that, the experience and looking at different things and maybe going into more shops than I would do normally.

PF3 I would rather go to Cardiff have lunch and browse round different things, there is so much more variety there than there is in Swansea.

PF8 I think parking is a big problem. You go into town, sometimes you can pay a fortune to park if you want to shop all day.

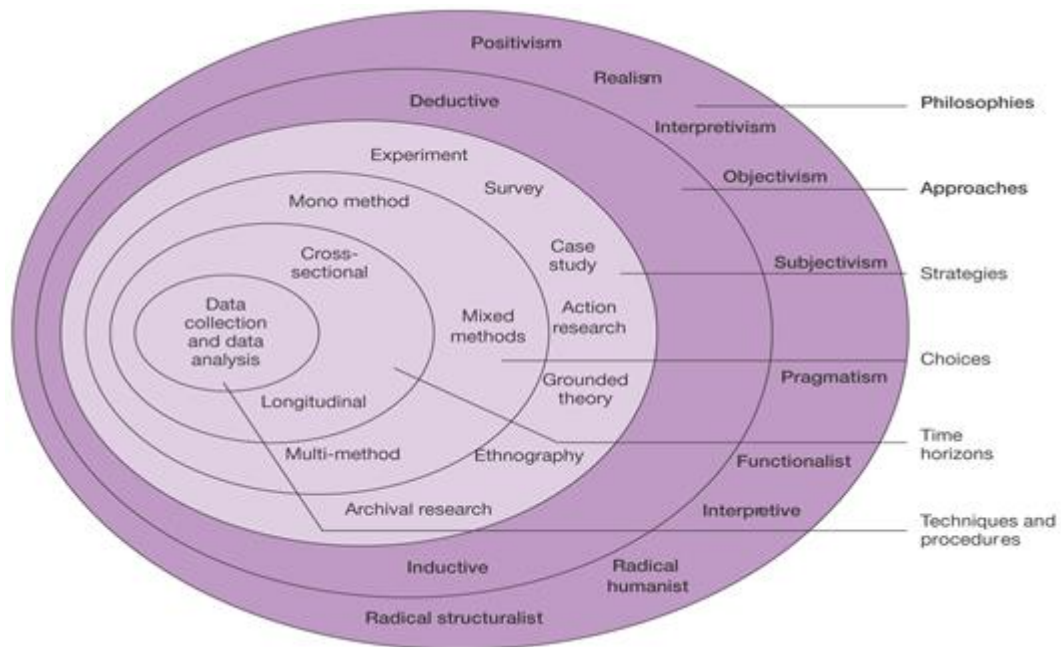
PF7: I think also whatever happens in any High Street you go into in Britain it is the same. It is the whole modernisation of the High Street.

PF5 Not just in Britain you go to Spain, Marks and Spencer

PF8 H&M they are there.

PF7 It just gets boring. I would like to consider and go to the smaller areas, the niche areas like Brick Lane and Shoreditch where it is really trendy, really hipster heaven in terms of finding something different and finding something more interesting than going in the west end I get much more out of that.

Appendix 8: The Research Onion



(Saunders et al., 2009)