University of Stirling

The Institute for Retail Studies

Grete Birtwistle

Customer and Company Perspectives of Store Positioning: A Study of the UK Specialist Menswear Fashion Sector

Submitted in fulfilment of the Degree of Doctor of Philosophy

May 2001

ABSTRACT

The UK market in fashion retailing is recognised as being the most concentrated in the world and companies in this sector are constantly striving to improve their market share and profitability. To do this requires a strong market position, which is developed, maintained and communicated to the target customer. This thesis explores the key issues of consumer and retailer perspectives of store positioning, how customers and retail employees perceive this image; and how image variables can be manipulated to defend or enhance market positioning. It concludes by developing a framework to indicate how image can be strategically managed.

The literature review commences by setting out the historical perspective of the study of consumer behaviour and discusses a number of models, which aim to explain shopper attitude towards store and product selection. It moves on to investigate the attributes contributing to store image perception and to explore a number of methods of measuring store image. Past and current trends in retailing are examined and marketing strategies in the formation of retail image are discussed.

The methodological pluralism used to obtain, generate and analyse data, is justified and results from four separate research phases. The exploratory research phase utilised qualitative methods to identify factors contributing towards store choice. In the second phase a multi-attribute model was applied to data to measure consumer and retail staff perception of store image. Furthermore, the congruence of customer and employee perception was evaluated. The third phase considered how consumers make store choice decisions by trading off attributes and allowed segmentation of sub-groups of customers with similar purchasing characteristics. The fourth phase used an interpretative approach to understand and compare key marketing strategies for two retailers.

The conclusion highlights the issues that retailers have to manage in a fragmented market of consumers with high expectations of product quality, customer service and store environment. The research identifies that store choice factors vary not only between sectors but also significantly within sectors and shows product quality to be the prime factor. In addition, employee store image perception is acknowledged to be a useful indicator of customer purchase intention and the research emphasises the importance of companies having an organisational culture, which nurtures employee attitudes, motivation and skills to anticipate consumer behaviour and to provide quality service.

ACKNOWLEDGEMENT

The author would like to express her sincere thanks to the following:

Professor Paul Freathy, The Institute for Retail Studies, University of Stirling, for his guidance, advice and support throughout the project.

BA/BA (Hons) Retail Management students, who as part of their own assessments, helped with data collection; and colleagues who helped with the piloting of questionnaires and content analysis of the exploratory phase.

Management of The Arcadia Group and Next Retail Ltd. who made the fieldwork phases possible and to whom I am indebted.

My husband Robert for his encouragement, support and proof reading.

Finally, I would like to dedicate the thesis to my mother who had hoped to be alive to see its completion.

DECLARATION OF AUTHENTICITY

This thesis is submitted in fulfilment of the requirements of the Degree of Doctor of Philosophy (by research) at the University of Stirling.

I declare that this document embodies the results of my own work and that it is composed by myself and has not been included in another thesis. Following normal academic conventions, I have made due acknowledgements of the work of others.

Grete Birtwistle
1 May 2001

AUTHOR'S DECLARATION

The following material has been published or presented prior to the completion of the PhD thesis.

Birtwistle, G., Clarke, I., & Freathy, P. (1999). Store image in the UK fashion sector: consumer versus retailer perceptions. The International Review of Retail, Distribution and Consumer Research, Vol. 9, No. 1, pp. 1-16.

Birtwistle, G., & Freathy, P. (1999). Customer segmentation in fashion retailing: a conjoint study. Journal of Fashion Marketing & Management,Vol.3, No. 3, pp. 245-254.

Birtwistle, G., Clarke, I., & Freathy, P. (1998). Consumer decision making in fashion retailing: a segmentation analysis. The International Journal of Retail & Distribution Management, Vol. 26, No. 4, pp. 147-154.

Birtwistle, G., & Freathy, P. (1998). More than just a name above the shop: a comparative case study of two UK fashion retailers. The International Journal of Retail & Distribution Management, Vol. 26, No 8, 318-323.

Birtwistle, G., Clarke, I., & Freathy, P. (1997). Image and store choice in fashion retailing: a conjoint analysis. Paper presented at the Retailing: End of a Century and a Look to the Future; The Fifth Triennial National Retailing Conference, St. Louis, Missouri.

Birtwistle, G., Clarke, I., & Freathy, P. (1997). Store choice: a conjoint analysis of UK fashion retailers. Paper presented at the XVII International Home Economics and Consumer Studies Research Conference, 'Lifestyle 2000', Dundee.

Birtwistle, G., Clarke, I., & Freathy, P. (1996). Consumer versus Retailer Perceptions of Store Positioning in the UK Fashion Sector . Working Paper No. 9602, Stirling: Institute for Retail Studies, University of Stirling.

Birtwistle, G., Clarke, I., & Freathy, P. (1996). 'O wad some pow'r the giftie gie us to see oursels as others see us: consumer versus retailer perceptions of store positioning in the UK fashion sector. Paper presented at the Marketing Education Group Annual Conference, University of Strathclyde, Glasgow.

Birtwistle, G., & Siddiqui, N. (1995). Store Image - characteristics for menswear fashion retailers. The Home Economist, Vol. 14, No. 6, pp. 20-22.

Birtwistle, G., & Siddiqui, I. (1995). Consumer perception of store image: a preliminary study. Paper presented at the XV International Home Economics and Consumer Studies Research Conference, Manchester Metropolitan University, Manchester.

TABLE OF CONTENTS

Chapter Four - Methodology

Chapter Nine – Discussion and Conclusions

INDEX OF TABLES

INDEX OF FIGURES

LIST OF APPENDICES

CHAPTER ONE

STORE CHOICE

1.1 Introduction

The aim of this thesis is to explore consumer store choice and to examine retail strategies for market positioning in the context of menswear fashion retailing. The economic rationale for creating strong market positioning is based on the theory that congruence between consumer perception of store image and the objectives of market positioning strategies result in customer loyalty towards a store (Samli and Lincoln, 1989). The argument is based on the assumption that retailers strive to attract consumers to their stores through an image created by emphasising particular factors, such as store design or product quality, and that this is effective if the chosen factors are those deemed important by the targeted customers (Rosenbloom, 1981). Ramsay (1992) suggests that individuals are affected by their surroundings and that retailers, to persuade consumers that gratification will be achieved through purchase of promoted goods, can manipulate their perception of what their needs are.

Studies on store choice have been approached from a variety of standpoints. These include store image (Bloemer and de Ruyter, 1998; Cassill *et al.,* 1993; Golden *et al.,* 1987; Hansen and Deutscher, 1977; Kunkel and Berry, 1968; Kuruvilla *et al.,* 1994; Lea-Greenwood, 1991; Lindquist, 1974; Martineau, 1958; Paulins, 1993; Thompson and Chen, 1998); store positioning (Davies and Brooks, 1989; Janssen, 1993; King and Rice, 1980); store loyalty (Osman, 1993); consumer behaviour (Darden and Ashton, 1974; Darden and Reynolds, 1972; Hirschman, 1979; Hirschman *et al.,* 1978; Lewis and Hawskley, 1990;

Reynolds *et al.*, 1974; Wortzel, 1987); customer service (Beatty *et al.*, 1996); and psychological judgements made by consumers (Amirani and Gates, 1993; Louviere and Johnson, 1991). However, much of this work has been concerned with supermarkets or department stores, and there has been only minimal sector specific research in multiple specialist fashion retailing. Fashion retailing, in this context, is defined as the organisations purchasing and selling mass produced fashionable clothing to satisfy consumer wants and needs (Adapted from Mueller and Smiley, 1995).

In order to fulfil the aim of the thesis the following specific objectives have to be achieved:

- to identify attributes or characteristics important to consumers in their choice of store when purchasing menswear fashion clothing;
- to analyse store image perceptions of consumers and retail employees for selected menswear fashion stores;
- to evaluate the importance of factors contributing to store choice;
- to explore retail strategies for market positioning;
- to develop a framework for successful market positioning.

The purpose of the first chapter is to examine models of consumer behaviour to provide a detailed framework of the relationships between inputs into the buying situation and the outcome in terms of store choice and purchase decisions (Chisnall, 1997). The second chapter identifies the factors contributing to store image formation and examines methods of measuring store image and store positioning. Trends in UK retailing are explored in the third chapter and an overview is provided of the major retailers selling fashion clothing. The methodology is justified in the fourth chapter and findings presented in subsequent chapters. The final chapter discusses the model for successful market positioning in the context of fashion retailing.

1.2 Marketing Management

> "Marketing means deciding who you want to sell to; defining what they may want to buy, how, when and where; defining your own style and image as a retailer so that you attract this target market; sourcing the appropriate goods at a price that 'fits' the chosen style; making people aware of what you are offering and then presenting the goods so that people want to buy them ... at an acceptable, residual profit."
>
> Walters and White (1987: 23)

Since the late 1980's, the fashion clothing sector has experienced very difficult trading conditions with pressure on profitability as a result of several factors, such as high interest rates and unemployment; increases in rent and changes to the business rating system; and greater competition between retailers resulting in higher customer expectation of value and service (Reynolds, 1989). In this increasingly competitive environment it has become vital for companies to understand how consumers make decisions on where and what they purchase. Marketing management is concerned with understanding consumer behaviour, identifying their needs and wants and satisfying these better than the competition. To understand why consumers purchase goods from one shop rather than another, marketing practitioners have to study the processes involved when individuals or groups select, then purchase and use products (Solomon, 1994).

It is argued that companies need to adopt a philosophy of total company orientation towards consumer satisfaction, which infers four major business implications:

- "The success of any firm depends above all on the consumer and what he or she is willing to accept and pay for;
- The firm must be aware of what the market wants, preferably well before production commences;

- Consumer wants must be continually monitored and measured so that, through product and market development, the firm keeps ahead of its competitors.
- Top management must achieve the integration of all components of marketing strategy ... into a single strategic plan based upon knowledge of consumer behaviour."

Foxall and Goldsmith (1994: 7-8)

Consumer behavioural research has evolved over the last few decades as economists, sociologists and psychologists have conducted empirical studies, developed theories and redesigned models. Engel *et al.* (1990: 3) define consumer behaviour as "those actions directly involved in obtaining, consuming, and disposing of products and services, including the decision processes that precede and follow these actions". There is general agreement about the complex nature of the purchase decision, but disagreement on how to interpret findings. Thus, some models of consumer behaviour are depicted as complicated flow charts, where relationships between variables and factors influencing behaviour can be suggested (Foxall, 1980), while others are grounded in theories derived from consumer attitude towards products. The remainder of this chapter will consider the main consumer behaviour models and theories and will identify one that can be used for interpreting and analysing perception of store image.

1.3. Comprehensive Models of Consumer Behaviour

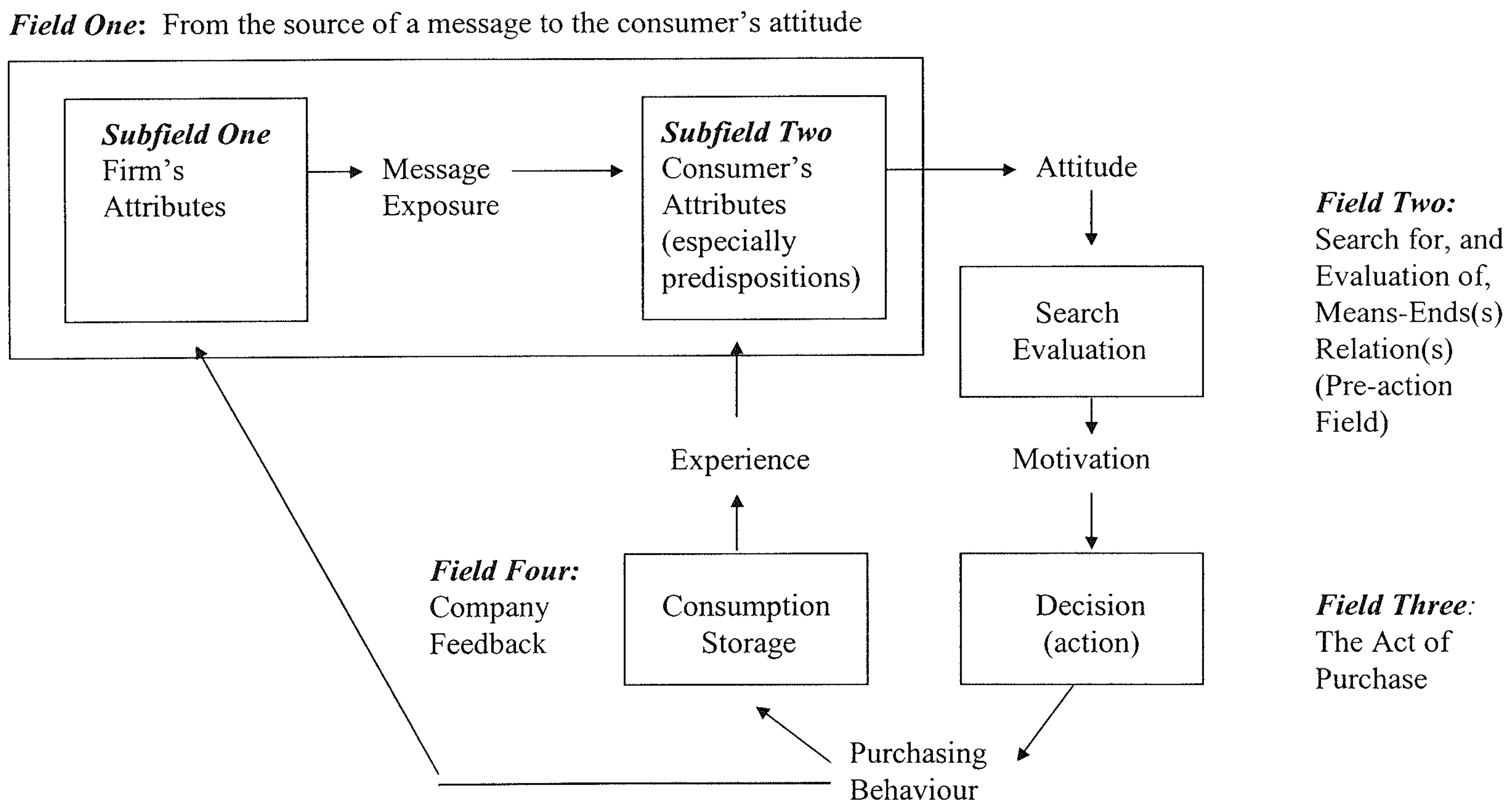
The American authors Nicosia; Howard and Sheth; Engel, Blackwell and Kollat; and Fishbein and Ajzen have lead the way in the development of consumer behaviour models. The first three depict consumer buying behaviour using intricate flow charts in contrast to Fishbein and Ajzen who designed a method to measure attitude and purchase intention.

1.3.1 The Nicosia model

The first comprehensive model, created by Francesco Nicosia in 1966, was grounded in extensive consumer behaviour research. The model described consumer behaviour when purchasing a new product or a new brand (Figure 1.1) (Horton, 1984; Nicosia, 1966). It is assumed that the psychological status of the consumer, from being aware of a need for a product, to satisfying the need by purchasing and then consuming or using the product, can be described in a way similar to the information processing operations of computers (McGuire, 1976; Olshavsky and Granbois, 1979). Nicosia (1966) interprets consumer behaviour as a series of cognitive problem solving and decision-making processes.

Nicosia suggests that the consumer decision process moves through four fields. In the first field the potential customer, not having heard of the product or brand, becomes aware of it through advertisements. If the consumer reacts positively to the message, an attitude may be formed and a need or a want for the product developed to motivate the consumer to move to the second field: the search for the brand and evaluation of the product against other brands. The potential customer may choose to move to the third field of deciding to purchase the brand, which in turn leads to the use or consumption of the product, at which stage the consumer forms an opinion about the product. The company selling the brand will generate feedback from the point of sale and this represents the fourth field. The whole process is continuous and the result of the fourth field feeds back into the first field of consumer predisposition, which leads to forming an attitude towards further 'message exposures'.

Figure 1.1 Summary description of the Nicosia model



Source: Nicoscia (1966)

Nicosia points out that the advertisement promoting a new brand is based on the company and the consumer profile. The consumer is assumed to receive the message and to use conscious or unconscious mental processes to reflect, understand and form an attitude to the brand. At this stage the consumer may move on to search for the brand. The search is normally founded on a combination of internal sources, such as memory about purchases of similar products and the perception of the company; and external sources, such as gaining information from peer groups, sales people and comparative shopping events. The search and evaluation stage may motivate consumers into buying the product. The third stage looks at the conditions under which the 'motivation to buy' is converted into making a purchase. Nicosia (1966) argues that the availability of the product, in-store promotions and attitudes of sales staff affect the purchase situation. The model examines, in its final stage, the consumer appraisal of the purchased product and the company feedback via management information systems (Foxall, 1991).

1.3.2 Evaluation of the Nicosia model

The model has a number of limitations. First, Nicosia's theory of consumer decision making is depicted as a circular decision model. Later models interpret consumer behaviour as one way, directional models that commence with the consumer realisation of a need and finish with the purchase decision or the attitude formation towards making repeat purchases (Horton, 1984). Secondly, the model is designed to explain consumer behaviour for a new product launch, but the theory describes a continuous process. However, when a brand is purchased, consumed and evaluated it is no longer a 'new brand' to that customer. Thirdly, the model includes company feedback as the fourth stage, in contrast to later models, which do not include the firm as a variable. Finally, Nicosia suggests that the model could be summarised in four linear equations based on four variables: communication sent by a company; attitude; motivation; and the final act of buying. Psychologists have since proved these equations not to be linear functions; for example, McGuire (1976) concluded that behaviour was not a linear function of attitude.

The Nicosia model has received little empirical examination (Zaltman *et al.*, 1973) as the model is difficult to test due to lack of information on the variables (Tuck, 1976). Moreover Nicosia depicts consumers as being highly rational, as do most of the comprehensive models of buyer behaviour, but this is not necessarily the way people behave (Horton, 1984). Research indicates there to be low correlation between attitudes and behaviour and that behavioural research into the decision process on attitude formation towards a product or brand also needs to include the analysis of actual purchases (McGuire, 1976).

Thus, the model is not suitable for measuring perception of store image since its objective is to measure behaviour from exposure to the advertising of a new product or brand. The Nicosia model may best be summarised as the first major comprehensive model of consumer behaviour based on information decision processes underpinned by research published up until 1965. Furthermore, the model has made an important contribution toward further research in the consumer behaviour field.

1.3.3 The Howard-Sheth model

Howard and Sheth (1969) developed a comprehensive model of consumer behaviour and, although minor amendments have since been made, the tenet of the theory has stayed the same. The model is based on the 'hierarchy of effect' of the information process (Figure 1.2).

Figure 1.2 Howard and Sheth information process

Attention

Brand Comprehension

Attitude

Intention

Purchase

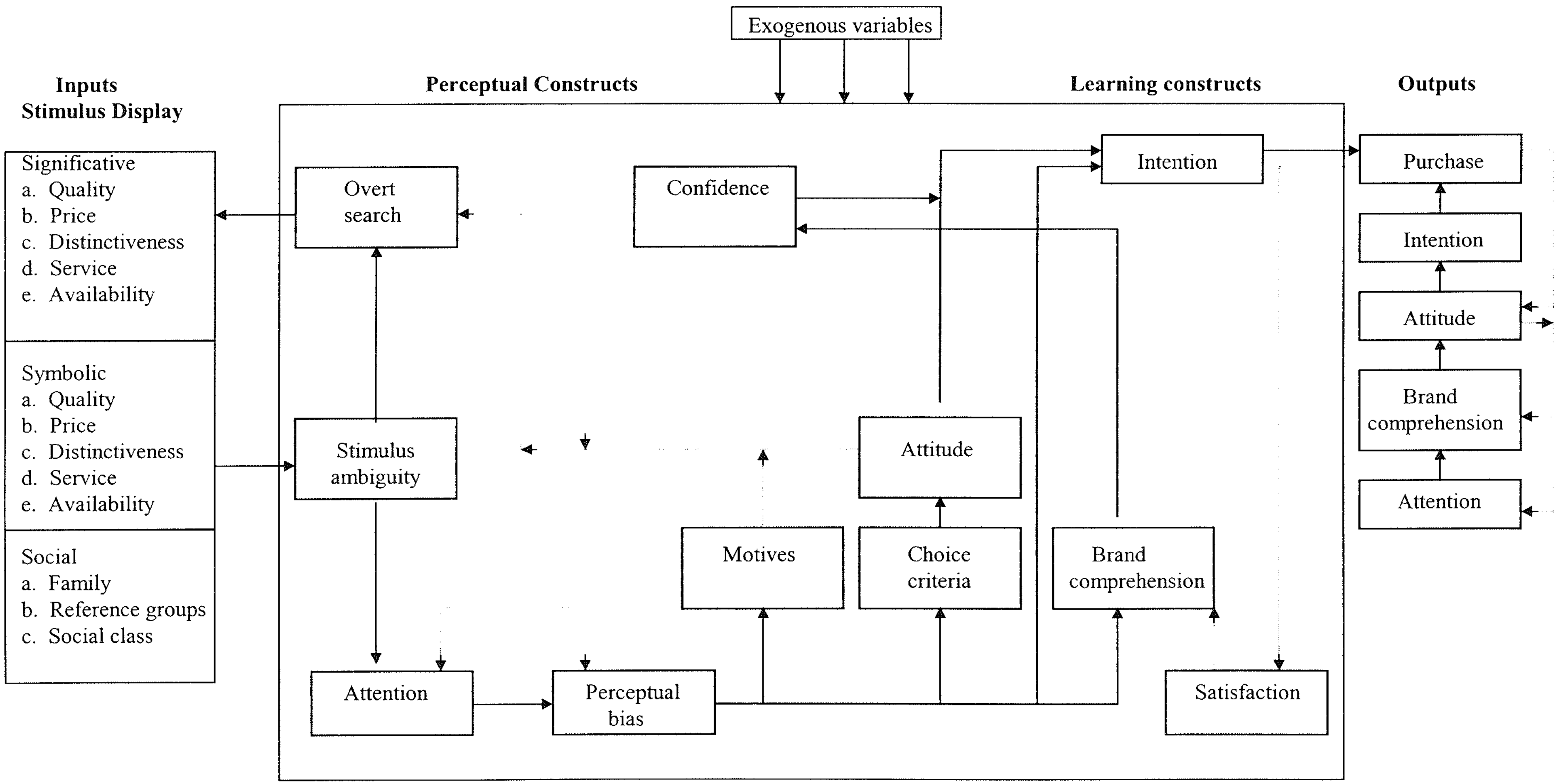
Source: Howard and Sheth (1969)

The model is divided into five specific elements: inputs, perceptual constructs, learning constructs, outputs and exogenous variables (Figure 1.3). The **inputs** combine the social and commercial stimuli influencing consumers. The model divides these into three categories: *significative inputs, symbolic inputs and social inputs* (Howard and Sheth, 1969).

Consumers are continually influenced by stimuli from the surrounding environment. Howard and Sheth argue that the *significative inputs* describe the product attributes, such as value for money, quality, availability and any other characteristics that influence consumers in their decision making. They interpret *symbolic inputs* as the way companies promote and advertise products and the way retail outlets present and sell them. *Social inputs* are the influences of referent groups, such as family, friends, peer groups, and social class that may affect the decision process. These inputs are all observable and are the "sum of all the social influences and of the marketing effort to which the buyer is exposed" (Howard and Sheth, 1969: 63).

The information inputs are processed and lead the consumer to have a perceptual bias. There are two processes involved in the **perceptual construct** stage: overt *search*, where the

Figure 1.3 Howard and Sheth's Model of Consumer Behaviour



Source: Howard and Sheth (1969)

consumer actively looks for information about a product and the *attention* process, which is passive. For example, the consumer may be aware of a need for a product, but does not actively search for information about it and may by chance become informed about the product through advertising or accidentally seeing it in a shop (Horton, 1984). Both these processes give feedback to the input elements and influence the consumer into forming a *stimulus ambiguity* from the information received so far. The interpretation is open to personal bias, which means that the individual consumer may distort or alter the information received (Howard and Sheth, 1969).

The central part of the Howard-Sheth model is the **learning construct** stage. This element consists of *motives, choice criteria,* and *brand comprehension.* Having processed and interpreted information, the consumer may move on to recognising a need or a want. To be able to satisfy this motive, the consumer must be able to identify the brand and, as a potential purchaser, must have developed a set of criteria to make a choice. In the Howard-Sheth model, brand comprehension is the identification stage and choice criteria are the evaluation stage. These three categories lead the consumer to form an *attitude* to a product or a brand (Horton, 1984), which over time may create *confidence* in the decision process to form an *intention* to purchase. Howard and Sheth suggest the degree of confidence in the product is determined by consumer motives, attitudes towards the brand and understanding of the brand attributes and this may lead to an intention to purchase (Foxall, 1980).

Post-purchase *satisfaction* is measured as the actual experience during the consumption stage as compared to the expectation held by the purchaser. Although this stage takes place after purchasing the product, Howard and Sheth (1969) suggest it is still part of the learning constructs due to the evaluation process. This may in turn affect the level of confidence in the brand and influence repeat purchasing (Foxall, 1980).

The hypothetical constructs of perception and learning are the information processes that cannot be observed. The **outputs** are the elements of consumer behaviour that can be observed and measured, and consist of *purchase, intention, attitude, brand comprehension* and *attention.* The purchase stage can be both observed and measured via sales data, in contrast to the other elements which require surveys to establish consumer awareness, perception and attitude towards a brand and the level of intention to purchase the brand (Howard and Sheth, 1969).

Howard and Sheth (1969) point out that external variables affect buyer behaviour indirectly. They do not affect the decision process, but may influence consumer intention to purchase. Schiffman and Kanuk (1994) advise marketing managers to be aware of these influences when they analyse market segmentation data. Howard and Sheth (1969) identify the salient **exogenous variables** to be the importance of the purchase; the consumer background, such as culture, reference groups, personality traits; time available for shopping; and financial status. These variables have to be considered by marketeers when targeting products at specific consumer segments. However, Howard and Sheth (1969) point out those variables can be added without changing the basic model. Howard and Sheth designed the model to have twelve primary functional relationships and suggested these should be tested in further research. Consequently, it is probably one of the most empirically tested models in the field of consumer behaviour research.

Howard amended the Howard-Sheth model after further research and replaced it in 1977 with the Howard model (Howard, 1977). A number of versions of the model were developed depending on whether the behaviour could be explained as extended problem-solving, routine or somewhere on the continuum between these. In the extended problem-solving model

Howard replaced *stimulus display* by an *information available* variable as a result of input from commercial and social communication, such as advertising and family and social influences. The information received would be lodged in the consumer short- or long- term memory and would change the individual's state into one of recognising a need, a brand or product, or instigate an intention to purchase. Changes in the model are minor and reflect the belief that consumer purchase decisions are arrived at through previous cognitive processes rather than coming afterwards, as in low involvement buying, where involvement is defined as the level of perceived personal importance and interest evoked by a stimulus or stimuli in a specific situation (Engel and Blackwell, 1982; Sheth, 1983). The decision making process is complex and consumers will attempt to speed it up by simplification (Wilkie, 1990). When involvement is low and the purchase risk is minimal, consumers undertake limited information processing and evaluation of alternatives (Krugman, 1965; Ray, 1982), which is typical for impulse purchases such as confectionery and soft drinks or repetitive purchases such as groceries (Evans *et al.*, 1996). In contrast, high involvement purchases are those that are of great significance to the consumer to the perceived personal or financial risk in purchasing the product. Hence, buying fashion clothing, a car or a house represents high involvement purchasing decisions (Laurent and Kapferer, 1985; Schiffman and Kanuk, 1994).

1.3.4 Evaluation of the Howard and Sheth model

The main critique of the model is the problem of converting its qualitative nature into quantitative measures (Ehrenberg, 1988). Howard and Sheth express the relationships between the different variables as twelve equations to allow the theory to be tested empirically. Nevertheless, the majority of studies have only tested specific functional relationships, due to the complexities of the theory and, consequently, only a narrow section of the theory has been tested in any experiment, rendering results difficult to validate (Holbrook, 1974; Lehmann *et al.,* 1966; Lehmann *et al.,* 1974). The one exception is Farley and Ring's (1970: 434-35) empirical research attempting to test the whole model. They argue that findings suggests that the test generated "estimates of the coefficients of the endogenous variables [that] show far stronger than chance results, in terms of the joint hypotheses", but that "the relationship involving the informational, exogenous variables were universally unsatisfactory, probably indicating that the section of the model involving the attention variable should be re-specified and that better measures of the exogenous variables were needed". The tests generated results which were only just statistically significant, possibly due to the difficulty of obtaining data to fit the model (as the data was not collected specifically to test the Howard-Sheth model). In light of this, Farley and Ring (1970) make three recommendations for future researchers attempting to test the theory:

1. That specific data should be collected to be able to measure each endogenous and exogenous variable.
2. That precise definitions should be made for the exogenous variables, as they hold the answer to company marketing strategy.
3. That techniques for piloting and collecting information should be clarified and standardised. When 'noisy' data has been collected it is difficult to identify later when all data is being analysed.

Farley and Ring (1970) accept that the Howard-Sheth model brought an increased awareness of consumer behaviour, but argue that their test did not satisfactorily endorse the model for use by marketing specialists. Taylor and Gutman (1974) point out that many of the variables are complicated to measure and that a number of measurements do not closely reflect the theoretical specification. It has also been suggested that additional endogenous and exogenous variables need to be included in the model (Ehrenberg, 1972; Engel and Blackwell, 1982).

The main contribution of the model is that, for the first time, it "brings together relatively confirmed hypotheses from learning theory, cognitive theory and exploratory behaviour theory ... [as well as] ideas from conflict theory and information processing theory" (Zaltman *et al.*, 1973: 117). Furthermore, changes made by Howard (1977) augmented the concepts of information processing within the model (Horton, 1984).

Howard and Sheth (1969) classify decision making into three categories: routine response behaviour, limited decision-making and extended decision-making. Routine response behaviour is used when consumers are buying frequently purchased, low cost goods such as groceries. Limited decision-making happens when consumers get to know about new products or brands within a familiar product class and decide to gain further information. An example of this is fashion purchasing where opinions are sought in the first instance from sales personnel and post purchase from family or friends. Extensive decision-making is used by consumers planning to buy expensive or infrequently purchased products, such as a car, when a wide search for information, via advertising, consumer reports and discussions with referent groups, can be observed (Lunn, 1974).

Although Howard and Sheth (1969) state that their model can be used for all three types of decision making, critics point out that consumers do not always follow the model through the whole process (Cobb and Hoyer, 1986; Horton, 1984; Kassarjian, 1978; Olshavsky and Granbois, 1979). They contend that the theory may be viable for high risk purchases, but looks too complicated for routine shopping in a supermarket where less information is sought before choosing a specific brand, while the unspecified exogenous factors, such as price and availability could have a large influence on the purchase decision. In fact, there is some evidence that a quite a few purchases may not be preceded by any decision process, even when a product or brand is purchased for the first time, but may be a result of conforming to group norms, imitation of others, personal recommendations, or deriving from lifestyle or cultural background (Olshavsky and Granbois, 1979). The changes that Howard (1977) made in the view of a number of critiques are still influenced by the belief that decision making takes place before all purchasing decisions and does not take into account the impulse or routine buyer who makes purchases and evaluates the goods afterwards.

Phillips and Bradshaw (1993) argue that comprehensive models are not realistic as consumers may be in several different stages of the decision process at any one time, rather than moving through the model in sequence. Moreover, they agree that the point of sale, visual perception and the environment all affect the purchase behaviour. Other critics maintain that the theory does not incorporate group decision making unless it is included as an exogenous variable (Zaltman *et al.,* 1973). Peer pressure, conforming to standards within the group and taking advice from family or partners are strong factors which need to be incorporated in any model, especially when buying fashion items (Miller *et al.,* 1993). As a result of this critique, Howard and Sheth developed the 'Sheth model of family decision making' (Sheth, 1974). This model is intended to demonstrate how purchasing decisions are made within families taking factors of gender, confidence, personality, peer groups, social class, lifestyle and role orientation into consideration. Furthermore, it recognises that joint purchasing decisions are prevalent when risk purchases, such as clothing, holidays or a car are contemplated (Smith, 1994).

On the positive side it is the only comprehensive model to have been empirically tested and amended by the authors in light of further studies (Howard, 1974; Howard, 1977). Additional research could overcome some of the problems highlighted above, but it is recognised, that, although the model is attractive in its exploration of consumer decision making, it is difficult to implement and expensive to test (Smith, 1994).

In retail terms, the purchase behaviour model suggests that differences in attribute importance are a function of the retail sector, the choice of stores within that sector and product type (Arnold *et al.,* 1997; Hansen and Deutscher, 1977; James *et al.,* 1976; Sheth, 1983). This relationship is not easy to test using the Howard-Sheth model, although part of the model was adapted to test consumer behaviour in a department store (Swan, 1977). To improve the performance of the theory Laroche and Howard (1980) recommended that future studies should utilise non-linear methods rather than econometric techniques to enhance the significance of the mainly qualitative theory.

To summarise, the model helps the researcher to understand the problems involved in interpreting consumer behaviour when choosing a brand, but does not provide a testable equation, which can be used for measuring store image. Sheth (1983) highlights the absence of a model for 'patronage behavior' and suggests this to be an area for further research.

1.3.5 The Engel-Kollat-Blackwell model

In 1968, Engel, Kollat and Blackwell (EKB) presented their consumer behaviour model as a response to the demand for an academic textbook on the subject (Engel and Blackwell, 1982). The authors used the Nicosia and the Howard-Sheth theories as underpinning for the model, have continuously adapted it in line with current research, and argue that a model of consumer behaviour represents a replica of a phenomenon since it comprises the 'building blocks' and variables in a flow chart to illustrate how these are related to each other (Figure 1.4). The model has four purposes:

1. "A frame of reference is provided for research.
2. Research findings can be integrated into a meaningful whole.
3. Models become useful in theory construction.
4. Explanations are provided for behavior itself."

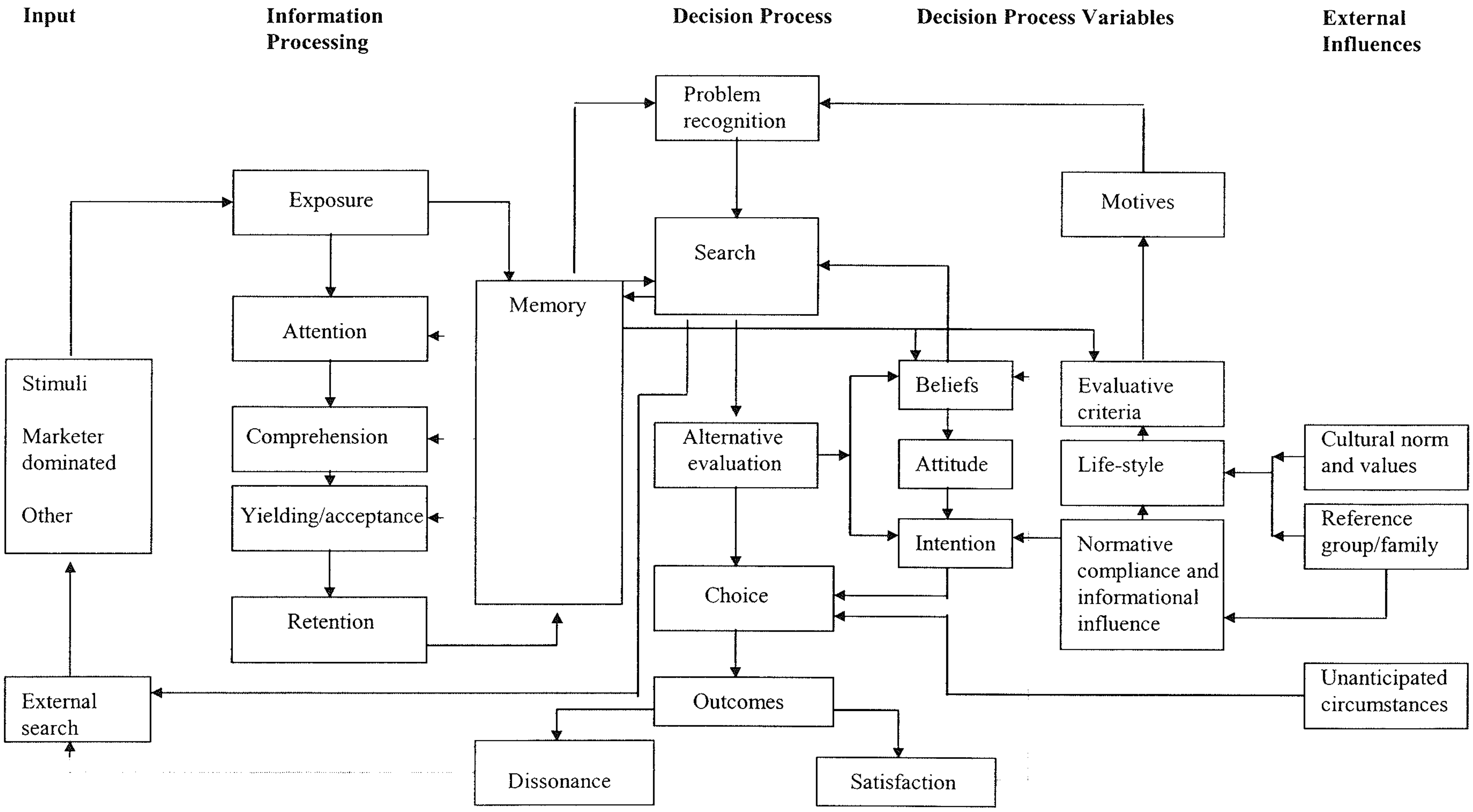
Engel and Blackwell (1982: 23)

The EKB model is based on consumers using high involvement decision processes such as in fashion clothing purchasing, due to the purchase price and the risk involved in making a wrong choice (Engel and Blackwell, 1982; Lewis and Hawskley, 1990). Decision-making is interpreted in terms of problem solving based on Dewey's (1910) model:

1. "**Problem recognition.** What happens to initiate the process?
2. **Search.** What sources of information are used to help arrive at a decision and what is the relative influence of each?
3. **Alternative evaluation**. What criteria are used by the consumer to assess alternatives? What are the resulting beliefs and attitudes about the alternative? What is the status of purchase intention?
4. **Choice.** What selection is made from among the available alternatives?
5. **Outcomes.** Is choice followed by satisfaction or by doubt that a correct decision was made?"

Engel and Blackwell (1982: 23)

Figure 1.4 The Engel, Kollat and Blackwell Model of Consumer Behaviour



Source: Engel, Kollat and Blackwell (1978)

The first stage establishes that the recognition of a problem or a need can come from an outside stimulus, which in turn will incite motives. This could be from an advertisement or by seeing goods in retail outlets. The consumer is induced into action when it is perceived that there is a difference between the present and the ideal condition. At the search stage, it is evaluated if enough is known about the product by using previously stored information or whether an external search is required. This is achieved by obtaining information from advertising, peer groups or sales staff. In the first two stages the consumer is using memory influenced by the information process progression encompassing exposure, attention, comprehension, yielding or acceptance and retention (Engel and Blackwell, 1982).

During the third stage, the consumer will advance to evaluate the information gained by the search and to make a choice of which product or brand to purchase. The evaluation process is based on the development of beliefs about a brand, the change in attitudes towards buying and may lead to the intention to purchase. Consumers compare different products by measuring them against a set of standards, the 'evaluative criteria'. For example, a positive attitude would be followed by a 'purchase intention', although this is influenced by the external forces and affects the attitude towards making an actual purchase. The choice stage relates to where the consumer plans to make the purchase; it could be on the high street, in a shopping centre, through mail order etc. (Engel *et al.*, 1990).

The evaluation process continues after the consumer has made the purchase choice. When choosing a product of high personal importance such as clothing where the product reinforces or enhances self image (Lewis and Hawksley, 1990; Thompson and Chen, 1998), the wrong decision is of greater consequence. Taking the product into use will give the consumer new information, which, in turn, will influence beliefs, attitudes and intentions towards repeat buying of the product or brand. Customer satisfaction is achieved if the consumer is happy with the purchase. The consequence of dissatisfaction may result in further external search or lead to complaints to the company that sold the product.

1.3.6 Evaluation of the EKB model

There are many structural similarities between the Howard-Sheth and the EKB models and both are depicted as comprehensive flow charts. The main difference between them is that Engel *et al.* clearly define the stage of 'problem recognition' and endeavour to include the possibility of 'dissatisfaction' at the post-purchase stage. Another advantage of the 1982 version of EKB model is the inclusion of the findings from the 'Fishbein behavioural intentions model' (described below), by including 'normative compliance' as a variable. Furthermore, out of all the three comprehensive models it is only EKB that incorporates culture as an environmental variable in recognition of how culture might influence consumer motives and problem recognition (Yau, 1994). A number of researchers argue that cultural background has a strong relationship to purchasing behaviour and that an understanding of targeted consumer culture would help to predict the acceptability of a product (Markin Jr, 1974; Sheth and Sethi, 1997).

The EKB model was not designed to be empirically tested, but was intended as a descriptive model of the purchasing process. The EKB model's main strength is as an academic consumer behaviour text. This was the authors main objective and to that end it has been very successful. However, the authors do suggest that it is possible to derive equations from the text, but as the model is not founded on a mathematical equation it cannot be utilised to measure brand or store image.

1.3.7 Evaluation of comprehensive models

Most researchers agree that consumer behaviour is a result of how the consumer reasons and processes information (Howard, 1983). The main criticism of comprehensive models is that they are best employed to describe the process of consumers making 'infrequently purchased, high cost products', but are not nearly as relevant for 'frequently purchased, low cost goods' (Lunn, 1974). Furthermore, McGuire (1976) points out that it is difficult to analyse the consumer buying processes using these models as consumers themselves are unsure of their true reasons for making a purchase decision. Research has also established gender differences in the decision making process with women being more likely to use more efficient approaches, such as decision trees and categorical methods, in contrast to men who prefer to utilise trade-off techniques (Meyers-Levy and Strenthal, 1991). These finding are particularly important when displaying merchandise within a store (Phillips and Bradshaw, 1993; Phillips *et al.,* 1997). It is argued that customers use fashion retailers as a destination store with an intent to purchase, but that the actual product bought may be different and based on the range stocked by the retailer (Stern, 1962).

All the comprehensive models regard the consumer as a person processing information and making decisions in a rational way using the whole of the decision making process. Research now suggests that this is not necessarily correct (Olshavsky and Granbois, 1979). Moreover, they explore consumer behaviour as a result of information gained from advertising, and therefore, describe consumer cognitive processes after the exposure. This does not allow for the high proportion of unplanned or impulse purchases, which have now been recognised as general shopping behaviour (Cobb and Hoyer, 1986; Iyer, 1989; Rook, 1987). Recent consumer desire for instant gratification has led to individuals making choices more impulsively, particularly if there is no control to hinder this behaviour (Sheth *et al.* 1999).

Impulse purchasing is defined as an unplanned decision to purchase a product (Davidson and Doody, 1966) without a need having been established before entering the store (Engel *et al.*, 1978). More recently, due to the critique of identifying the difference between unplanned purchases, where the consumer may use the store layout to remind them of purchase needs such as milk or bread, and impulse purchases, Rook (1987) re-specified the term impulse purchasing. Thus purchases are categorised as planned or unplanned and impulse purchases, where planned purchases are identified as products or brands intended to be bought, an intentional act. Unplanned purchases are those made by a consumer where a deliberate decision had not been made before entering the store and are subdivided into three groups:

- **Restocking unplanned purchases**, which are purchased goods, used regularly by the consumer but were not planned to be purchased on that visit. However, these products will be needed in the future;
- **Evaluated new unplanned purchases** are needs not acknowledged by the consumer before entering the store. These are products not in need of substitution but purchased as additional items to increase existing range previously bought. Fashion clothing is often unplanned acquisitions.
- **Impulse purchases** is an extreme form of unplanned purchasing where the goods are not required and bought due to a sudden urge or desire. Some consumers need instant gratification and will purchase fashion clothing in order to get self-satisfaction, cheer themselves up or to rewards themselves. These purchases may well be made instantly without an appraisal of requirements (Rook, 1987).

It is estimated that up to 70 per cent of all goods purchased are unplanned and retailers maximise sales by designing a retail environment to optimise planned, unplanned and impulse purchases. This is achieved by the way the store is laid out and is also influenced by other factors such as prices, product characteristics, packaging and merchandising as well as the intervention of sales personnel (McGoldrick, 1990). Unplanned and impulse purchasing is at its highest in supermarket shopping and reduces with the increase in the cost of goods.

Research into fashion related sales have found that a high proportion of goods sold might be unplanned purchases (Cobb and Hoyer, 1986; Rook and Fisher, 1995). For example, Bellenger *et al.* (1978) identified costume jewellery purchases to be in excess of 60 per cent; Willian and Dardis (1972) found that 46 per cent of women's outerwear and 30 per cent of women's underwear were unplanned; and both Williams and Dardis (1972) and Bellenger *et al.* (1978) found that the rates of unplanned or impulse buying in the menswear clothing section were respectively 32 and 40 per cent. However, the difference between unplanned and impulse purchases are not clearly defined by these authors.

Unplanned or impulse buying does not sit comfortably with comprehensive consumer behaviour models, since the decision process is not planned and rational. In addition, unplanned buying may be an increasingly dominant factor as shopping has become more of a leisure activity (Dibb *et al.,* 1994). A number of authors note that comprehensive models are not satisfactory in explaining consumer behaviour and argue that exogenous factors, such as situational influences, account for more variance than personal consumer characteristics (Bearden and Woodside, 1976; Mattson, 1982; Phillips and Bradshaw, 1993; Ward and Robertson, 1973). Engel *et al.*, (1978) do suggest that both individual characteristics and situational factors contribute to the decision process, but Bowers (1973) and Lutz and Kakkar (1974) conclude that it is the interaction between these two elements that is critical. Lutz and Kakkar contend that situations are of a subjective nature and defined situational influences to be:

"An individual's response to, or interpretation of, all factors particular to a time and place of observation which are not stable intra-individual characteristics or stable environmental characteristics, and which have a demonstrable and systematic effect on the individual's psychological process and/or his overt behavior."

Lutz and Kakkar (1974: 439)

In contrast, Belk (1974) argues that situations should be objectively defined without considering intrapersonal factors and should be described as a number of situational dimensions:

1. **Physical surroundings,** such as location, decor, sounds and other environmental factors.
2. **Social surroundings,** which include the social interactions of the situation.
3. **Temporal perspective** provides a time description.
4. **Task definition** features the intent to shop for, select or obtain information about a purchase.
5. **Antecedent states,** which are momentary conditions or moods, recognised to be antecedents to the situation.

This interpretation can help retail managers to understand how consumers can be influenced in the decision to purchase or not to purchase from a selected store and hence, develop strategies to optimise sales. Both these interpretations are complementary rather than contradictory (Yau, 1994). In summary, comprehensive models can help marketing practitioners understand the consumer decision process and purchasing behaviour, but are impractical and, therefore, not appropriate for marketing management (Foxall, 1980).

1.4 Attitude Models

Research into 'attitude' was developed by social psychologists at the same time as the comprehensive cognitive models were developed. While psychologists were researching problem solving and decision making, social scientists were studying the relationship between attitude and behaviour. Allport (1935) defines attitude to be a cognitive state of preparedness to react, which is established as a result of experience and applies an active influence on behaviour. Psychologists believe that a change in attitude would be followed by a change in behaviour. A scalar method was developed to measure attitudes for or against an idea or a product (Thurstone, 1929; Thurstone and Chave, 1929). Attitude surveys became used on a regular basis, since measurements were easy to implement, but by 1935 there was a realisation that they were not in themselves sufficient to measure behaviour (Allport, 1935). This led to further research into the relationships between attitude, intention and behaviour.

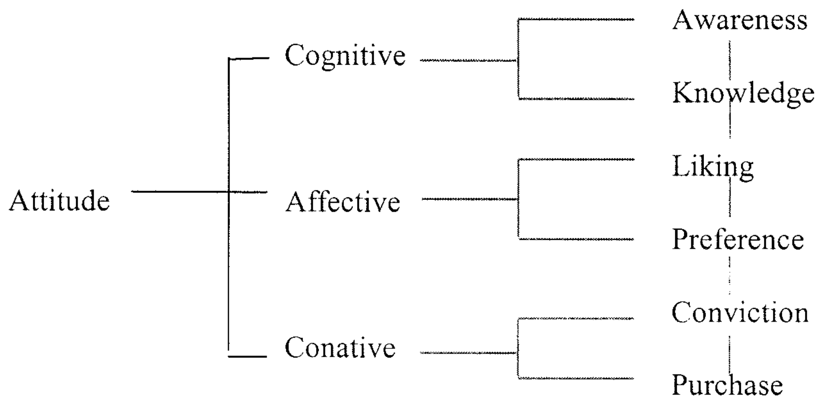
1.4.1 Consumer attitudes

The knowledge that consumers develop an attitude towards an object is very important to marketing managers as attitudes are a long term, extensive evaluation of people, objects or issues (Baron and Byrne, 1987). Fishbein and Ajzen (1975: 6) define attitude as "learned tendencies to perceive and act in some consistently favourable or unfavourable manner with regard to a given object or idea, such as a product, service, brand, company, store or spokesperson". This can be influenced by conditions, and as such can provide an indication of future behaviour (Schiffman and Kanuk, 1994). Attitudes are not something people are born with, but are developed as a result of communication, experience, knowledge and reflection (Lutz, 1991). Both the Howard and Sheth and the EKB models illustrate attitude as an outcome of learning and as "any change in behaviour which comes about as a result of experience" (Foxall, 1980: 39).

Retailers need to be aware of consumer *beliefs* about a product, the sales environment or the company, because these influence their attitude in a positive or negative way (Jobber, 1995). Consumers develop beliefs either in their search for a product or by post purchase experience based on one or more criteria. It is important for retailers to have a realistic view of consumer perceptions, otherwise sales may be affected and company reputation damaged with long-term consequences. To a marketing department, the study of consumer attitudes and behaviour is important due to the link between learning, perception and a consumer tendency to act in a certain way (where perception is the individual interpretation of the product, brand or store) (Schiffman and Kanuk, 1994). With this understanding, a marketing strategy can be based on relevant information. Consequently, market research is important in monitoring consumer attitudes. In the first place, it can examine target customer beliefs about the company and its products to enable problem areas to be addressed. Secondly, marketing communication can reinforce the positive beliefs of consumers and attempt to change misconceptions about the brand.

Attitude consists of three components: cognitive, affective and conative (Schiffman and Kanuk, 1994). The cognitive dimension refers to information known about the object, person or situation; for example knowledge about a product. The affective dimension relates to the feeling an individual has about the product, which may be voiced in terms of likes or dislikes. The conative dimension concerns the person's behaviour or attitude making them likely or unlikely to purchase the product. This is usually termed the intention to purchase within a specified time (Solomon, 1994). The relationship between these three components is thought to vary in strength independently of the others and, it is argued, portray the nature of the attitude (Krech and Crutchfield, 1962). Attitude can be depicted as a simplified flowchart (Figure 1.5).

Figure 1.5 Attitude components and buying behaviour



Source: Easey (1995)

1.4.2 Multi-attribute models

Fishbein (1967a) developed a multi-attribute model, Attitude-toward-Object, to measure attitude based on behavioural learning theory. The model presumes that "consumer's attitude (evaluation) of an attitude object (A_o) will depend on the beliefs he or she has about several or many attributes of the object" (Solomon, 1994: 165). Attitude is measured by two components: beliefs about the object and evaluative aspects of these beliefs (Fishbein, 1983). Belief about a concept is defined as the probability that a relationship exists between an object and the concept. For example that quality clothes are durable. The evaluative aspects of a belief reflect the importance assigned to the concepts in forming an attitude towards the object, such as the importance of purchasing clothes that are durable. The model consists of an algebraic formula, which calculates consumer attitude towards an object (Figure 1.6).

Figure 1.6 Fishbein's model of Attitude-toward-Object

$$A_o = \sum_{i=1}^{N} B_i a_i$$

where

A_o is the overall attitude toward object o

B_i is the belief that object o possess some concept i

a_i is the evaluation of the goodness or badness of concept i

N is the number of beliefs

Source: Adapted from Doyle and Fenwick (1974)

Fishbein recommends that seven point semantic differential scales be utilised for measuring belief about behaviour (Fishbein and Raven, 1962). The most salient beliefs are incorporated into statements based on findings from exploratory research. Studies indicate that the six or seven most salient beliefs account for over 60 per cent of total responses (Tuck, 1973). The second component evaluates the consequences of the behaviour in question (Dabhlokar, 1994). Again seven point semantic differential scales are utilised. Fishbein contends that attitude is equal to the sum of the product of beliefs and evaluations. Moreover, attitude towards a brand is uni-dimensional and can be measured separately utilisng semantic differential scales (Ajzen and Fishbein, 1980; Tuck, 1973).

1.4.3 Evaluation of multi-attribute models

Although the Fishbein model has been employed extensively, it has been criticised for the method utilised at the application stage. In the first place, measurement of attitude is based on respondents completing scalar questions to which people react differently some utilising the middle range and others by ticking extremes (Samson and Harris, 1970). It is difficult to separate differences in response style from actual differences in beliefs about the attributes, despite the fact that techniques are available to adjust measurements to eliminate scalar effects. Moreover, comparison of groups becomes difficult to substantiate due to the different response patterns. In addition, critics suggest respondents may be influenced by the halo-effect when evaluating well known brands (Doyle and Fenwick, 1974).

Bagozzi (1994) argues that attitudes are multi-dimensional, consisting of 'affective-cognitive-conative parts', and cannot be equal to a single $\Sigma B_i a_i$ measurement (Oliver and Bearden, 1985). Fishbein and Ajzen (1975) insist that the model interprets attitude to be uni-dimensional and is an evaluative concept and not an aggregation of evaluation, cognition and behavioural dispositions (East, 1990). Reviewers denote that Fishbein's theoretical statement is intended to measure attitude to a single stimulus, while marketing applications have adapted the model to evaluate multiple stimuli, such as consumer choice, which is beyond the scope for which it was designed (Doyle and Fenwick, 1974).

Identifying a favourable attitude to an object does not necessarily mean that it reflects an intention to purchase (McGuire, 1976), but researchers note that measuring attitudes to a behaviour, such as purchasing a brand, has high correlation to the salient beliefs about the brand (Ajzen and Fishbein, 1980). Recent research claims that, even if there is a link between attitudes and actual behaviour (Katona, 1960), holding a positive or negative attitude will not necessarily make consumers behave in a particular way, as they may have conflicting attitudes towards a certain behaviour (Assael, 1998). For example, shopping for designer labels may be perceived as a pleasurable activity, but spending a large amount of money on an individual garment may be believed to be inappropriate. A number of studies have found the correlation between actual behaviour and attitudes to be low and argue that behaviour is determined by a number of factors and not exclusively by attitudes (Anon, 1990).

Attitudes in the main are useful in predicting behaviour when beliefs are strong and based on experience as well as being closely related to the predicted behaviour (Assael, 1998).

Measurement of intentions to act has been found to be more reliable than using a multi-attribute model (Knox and de Chernatony, 1994), but infers that researchers do not understand the underlying factors that combine to make the consumer behave in a particular manner. For this reason, researchers and retailers continue to find multi-attribute models important in understanding consumer decision making (Schiffman and Kanuk, 1994) and consequently it is chosen in this study as a suitable model for analysing and interpreting perception of store image.

1.4.4 The Extended Fishbein model

Critique of the Fishbein model, led Fishbein and Ajzen (1975) to develop an improved version named 'the Theory of Reasoned Action', which measures behavioural intentions with the knowledge that certain factors constrain intentions being converted to behaviour. Ajzen and Fishbein (1975: 42) define behavioural intentions as "a measure of the likelihood that a person will engage in a given behavior".

There are two main changes from the Fishbein model (Figure 1.7). First, the measurement of attitude towards an object; A_o, is changed to $A_{act,}$ which stands for the measurement of attitude towards the act with regard to the object, although it recognised that a consumer could have a favourable attitude towards a brand without having the intention of purchasing it. The second change is to include a variable, the subjective norm, measuring the perceived pressure to behave in a certain way. The subjective norm includes two components, one measuring the normative beliefs, the influence of peers, friends and family on the decision, and the other measuring consumer motivation to comply with the referent group. Measurements for beliefs and evaluation of those beliefs come from questions expressed in terms of intentions towards purchasing the object (Foxall and Goldsmith, 1994; Horton, 1984; Tuck, 1976).

Figure 1.7 Theory of Reasoned Action

$$B \cong BI = (A_{act})w_1 + \sum_{j=1}^{k} (NB_j \text{ x } MC_j)w_2$$

where

B	is overt behaviour;
BI	is behavioural intention;
A_{act}	is the attitude towards taking a specific action;
NB	is normative beliefs;
MC	is motivation to comply with the normative beliefs;
k	is the number of normative beliefs;
w_1 w_2	are the weights reflecting the relative importance of the two components that must be statistically estimated via regression analysis.

A_{act} is defined as A_o in the Fishbein model:

$$A_{act} = \sum_{i=1}^{N} B_i a_i$$

Source: Fishbein and Ajzen (1975)

When the model is utilised for marketing research, Ajzen and Fishbein (1980) suggest that 'salient attributes' should be replaced by 'evaluative criteria', such as store layout, merchandising, price etc.; 'belief', B_i, should be replaced by a measurement of 'satisfaction/lack of satisfaction'; and 'attribute evaluation', a_i, replaced by an importance criterion. In the equation w_1 and w_2, relative importance, and the subjective norm remain the same.

1.4.5 Evaluation of the Extended Fishbein model

Empirical studies have found improved results from using the extended version compared with the original model (Bonfield, 1974; Knox and de Chernatony, 1994; Ryan and Bonfield, 1975; Tuck, 1973). The main advantage of the model is that it is designed to predict voluntary behavioural intentions and not only attitudes based on the assumption that intentions will closely correlate with actual behaviour if the environment is right (Foxall and Goldsmith, 1994).

The model measures consumer attitude to a behaviour when given a possible choice (Tuck, 1976). Ajzen and Fishbein (1980: 165) suggest that in a purchasing situation, where the consumer has a choice, "intentions to buy a given product, and actual buying behavior, are determined not by attitudes toward the brand per se, but by attitudes toward buying the brand and by subjective norms with respect to this behavior". An additional strength of the model is that fashion buying is an area where people are affected by peer or family pressures (Miller *et al.*, 1993).

It should be noted that the model is often used for purposes for which it was not designed. Ajzen and Fishbein define beliefs as the perceived consequences of an action rather than the perceived attributes of a brand. Rather than rating a brand on its attributes the model is recommended to rate consumer attitudes based on the likelihood of outcomes of the behaviour (Ajzen and Fishbein, 1980). The model is intended to measure predicted behaviour and not to forecast the outcome of the behaviour (Solomon, 1994). Moreover, a number of studies have found it difficult to identify reliable variables to measure, as well as identifying the interrelationship between attitude and normative beliefs, which can make results difficult to interpret (Miniard and Cohen, 1981; Wilkie, 1990).

Research indicates that there is a high correlation at an individual level, between behaviour and intention, if the time lapse between measurement of intention and actual predicted behaviour is short, but the correlation decreases as the time span between the two increases (Ajzen and Fishbein, 1980; East, 1990; Foxall, 1983; Foxall, 1984; Ryan and Bonfield, 1975). For example, unforeseen events, such as a change of economic status, can intervene to change intention (Knox and de Chernatony, 1994). Furthermore, the model sets out to predict behavioural intentions and not actual behaviour and problems have been detected when consumers do not feel very strongly about a particular brand or their intentions are transitory.

As a result of this critique, Ajzen and Fishbein (1980) reached the conclusion that it is only possible to predict behaviour from intentions when the conditions are very closely specified. They recommend researchers to focus on four factors to achieve high correlation between intention and behaviour: the object must be clearly expressed; the intended behaviour must be clear to the respondent; and the time and context must be defined.

1.5 Conclusion

Marketing departments are continually trying to find ways of making the marketing strategy more effective, and product development, advertising and distribution more efficient. In the early part of this century, it was economists who studied the behaviour of consumers, but after the second world war marketing departments started to employ psychologists to investigate how consumers could be motivated into buying the increased production (Engel and Blackwell, 1982).

Research has identified that companies, to persuade individuals they have needs and that gratification will be achieved through the purchase of promoted goods, may manipulate consumer perception. A number of models have been created to explain human motivation for consumption. These fall into two main types: comprehensive, rational models, suggesting that individuals make purchase decisions based on rational thought processes with an aim to optimise consumption benefits (Schiffman and Kanuk, 1994); and attitude models which propose consumer behaviour is influenced by personal, subjective criteria such as desire to express self image through purchases and consumption (Hirschman and Holbrook, 1982).

The comprehensive models have been found useful to increase understanding of the consumer decision process, but have, nevertheless, been found too complex to use as an instrument for quantitative measurements. The consumer decision process, which formed the basis for the EKB model, could equally well be utilised for store choice (Merrilees and Miller, 1996) as problem recognition is not only applicable to brand choice, but also to selecting the appropriate retail outlet. In reality, the qualitative nature of comprehensive models has led both researchers and companies to utilise attitude models, since they are easy to employ for applied consumer research.

Attitudes are learned dispositions towards an object, person or situation that may, in retail terms, lead to a favourable or unfavourable outcome. Many researchers have tested the multi-attribute model and found it to be a useful method to assess consumer attitude to a brand, product or a store as it is assumed that purchase rates are a direct result of attitude towards a product. For example, Bass and Talarzyk (1972) found that by using the multi-attribute model, they obtained a higher percentage of correct forecasts of actual preference than by using other models. Although, it is acknowledged that the underlying theory of the Fishbein model does not explain the adapted multi-attribute model, but in practice it has been used to great effect by many researchers and is reasonably reliable as long as the conditions have been clearly expressed (Ajzen and Fishbein, 1980; Bass and Talarzyk, 1972).

Retailers promote their brand to targeted consumers in terms of price, quality or design of merchandise and stores, which allows shoppers to evaluate alternatives. The motivation for individual purchasing behaviour is grounded in both functional and symbolic needs depending on the type of product sought (Bhat and Reddy, 1998). Store image is a particularly important factor when purchasing clothing, as the decision of where to shop will be based on the overall image perceived by the consumer in relation to their own image or their personal aspirations. Moreover, post-purchase evaluation of the merchandise and the shopping experience will reinforce the attitude towards the retailer and the brand in a favourable or unfavourable manner.

CHAPTER TWO

STORE IMAGE

2.1 Introduction

There are indications that store image is an important differentiator, particularly for fashion retailers during times of recession. The literature on fashion theory suggests that fashion clothing is a form of communication influenced by social norms and self-expression (Beck, 1985); and a personal handwriting that uses symbolism to convey the social identity a person seeks to communicate (Davis, 1985; Dichter, 1985); as well as revealing the personality of the individual (Goldsmith, 1990). Fashion clothing has changed from being mainly utilitarian and functional to become aspirational and self-enhancing (Jackson and Shaw, 2001).

Fashion as a noun is defined as a 'style of clothes or behaviour; in the latest style' of as a verb as 'to design, to create, to construct' (Collins, 1991: 362). In the context of fashion clothing it refers to the prevailing style of dress worn by individuals at a particular time (Mueller and Smiley, 1995) and 'whenever a style is accepted and worn by a sufficient number of people it is in fashion or becomes a fashion' (McJimsey, 1973: 48). These definitions also imply that different styles can be in fashion at the same time since individuals value diversity, hence, different fashion clothing can exist simultaneously. Nevertheless, fashion clothing only stays in vogue for a short time until new styles follows (Jackson and Shaw, 2001; Perna, 1987) and this is the reason why fashion retailers promote ranges for short periods, normally no longer than one season.

Most high street fashion clothing is mass produced having been adapted from styles created by fashion designers in London, Paris, Milan or New York and UK retailers have to deliver the latest fashion 'look' to their outlets with increasing speed to stay ahead of the competition and in order to satisfy consumer needs and wants (Jackson and Shaw, 2001). This infers that multiple fashion retailers are organisations that purchase and sell seasonal mass-produced fashionable clothing to satisfy consumer wants and needs (Adapted from Mueller and Smiley, 1995). However, this definition also exhibit the manifest complexity of fashion retailing since it implies that this sector sells clothing that is in fashion for a limited period and thus constantly changing its product ranges.

The aim of this chapter is to examine the main body of store image research and to evaluate the methods utilised in measuring retail image in department store and fashion retailing. Furthermore, the chapter explores the issue of consumer and employee congruence of store image and concludes with an examination of store positioning strategies utilised in fashion retailing.

2.2 Store Image

Store image has been identified as one of the most important marketing mix variables (Greenley and Shipley, 1987; 1988). Understanding store image is a complicated process, yet vitally important for retail managers. Store choice has been approached from a variety of standpoints in marketing literature, but much of this work has been carried out in supermarkets or department stores with limited research in multiple specialist fashion retailing and few studies have attempted to evaluate consumer trade-off on salient variables as defined by consumers.

2.2.1 Definition of store image

Martineau's (1958) seminal paper on store image suggests that consumers perceive retail stores to have personalities and that these are created from a combination of store layout and architecture; symbols and colours; and advertising and sales personnel. Martineau (1958: 47) describes store image as "the way in which the store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes". The study proposes that consumers choose a store with the image that most reflects their own self-image and, consequently, the importance for retailers to understand why shoppers perceive stores differently and how marketeers can manipulate store image factors to influence store choice (Hite and Bellizzi, 1985). After empirically testing the self and store image congruence hypothesis Bellenger *et al.* (1976) conclude that retailers projecting an image replicating the targeted consumer image would increase store loyalty.

Kunkel and Berry (1968: 22) define store image as "the total conceptualized or expected reinforcement that a person associates with shopping at a particular store" and conclude that image is gained through experience and, therefore, learned. This behavioural approach illustrates the view that consumers will act in a deliberate way to a given set of stimuli. After reviewing nineteen image studies, Lindquist (1974: 31) highlights the issue of different store image definitions and observes that cited definitions lead to the agreement that store image is complex and consists of "a combination of tangible or functional factors and intangible or psychological factors that a consumer perceives to be present".

A behavioural approach is proposed by James *et al.* (1976: 25) and cause them to define store image as "a set of attitudes based upon evaluation of those store attributes deemed important by consumers". Concordant with Kunkel and Berry (1968) they conclude that the perception of store image is acquired based on individual experiences in a store, by talking with friends, or by seeing advertisements and window displays. Mazursky and Jacoby (1986) point out that previous definitions do not reflect the process of store image development and hence, define store image as "a cognition and/or affect which is inferred either from a set of ongoing perceptions and/or memory inputs attaching to a phenomenon and which represents what that phenomenon signifies to an individual". They suggest that their definition does not refute previous definitions, but encapsulates both cognitive and affective components of image perceptions.

2.2.2 Factors contributing to store image

Store image research can be divided into conceptual and behavioural research. The first endeavours to discover factors contributing towards the concept of store image; the second considers differences in store positioning and retailer image as well as the association between store image and consumer behaviour (Peterson and Kerin, 1983). Kunkel and Berry's definition has been empirically tested in Berry's (1968, 1969) study of three department stores and is based on a sample of 350 account holders from each store. Respondents were asked three unstructured questions about the store with which they held an account: what they liked and disliked most about the store and why they thought other people used the store. Responses were assigned to one of twelve pre-determined image dimensions and explained 99 per cent of consumer responses (Table 2.1). Kunkel and Berry (1968) conclude that the empirical findings supported the hypothesis that store image consist of twelve image dimensions and identify that different combinations of dimensions and components describe the image profile of each store.

Lindquist (1974) included the work of Martineau (1958) and Kunkel and Berry (1968) in the review of store image studies and created a list of nine store image dimensions (Table 2.2). Lindquist calculated the frequencies of categories mentioned by researchers and these are

Table 2.1 Image dimensions and components

1 Price of Merchandise
a. low prices
b. fair or competitive prices
c. high or non-competitive prices
d. values, except with specific regard to premiums, such as stamps, or quality of merchandise

2 Quality of Merchandise
a. good or poor quality of merchandise
b. good or poor department(s), except with respect to assortment, fashion, etc.
c. stock brand names

3 Assortment of Merchandise
a. breadth of merchandise
b. depth of merchandise
c. carries a brand I like

4 Fashion of Merchandise

5 Sales Personnel
a. attitude of sales personnel
b. knowledgeability of sales personnel
c. number of sales personnel
d. good or poor service

6 Location Convenience
a. location from home
b. location from work
c. access
d. good or poor location

7 Other Convenience Factors
a. parking
b. hours store is open
c. convenience with regard to other stores
d. store layout with respect to convenience
e. convenience (in general)

8 Services
a. credit
b. delivery
c. restaurant facilities
d. other services (gift consultants, layaway plans, baby strollers, escalators, etc)

9 Sales Promotions
a. special sales, including quality or assortment of sales merchandise
b. stamps and other promotions
c. fashion shows and other special events

10 Advertising
a. style and quality of advertising
b. media and vehicles used
c. reliability of advertising

11 Store Atmosphere
a. layout of store without respect to convenience
b. external and internal decor of store
c. merchandise display
d. customer type
e. congestion
f. good for gifts, except with respect to quality, assortment or fashion of merchandise
g. 'prestige' store

12 Reputation on Adjustments
a. returns
b. exchange
c. reputation for fairness.

Source: Kunkel and Berry (1968: 26)

quoted here in brackets. The review concludes the most important image factors to be merchandise dimensions, consisting of selection (42 per cent), quality (38 per cent), pricing (38 per cent) and fashion and style (27 per cent). Two other components, general service (27 per cent) and sales clerk service (27 per cent), are identified as the next most important factors. The findings of both Lindquist and Kunkel and Berry are similar demonstrating a high consistency between studies.

Table 2.2: Store Image Attributes

The Most frequently cited attribute dimension including the contributing components	Other attribute dimensions
1. Merchandise - quality - price - selection - fashion and style	2. Service 3. Clientele 4. Physical facilities 5. Convenience 6. Promotion 7. Store atmosphere 8. Institutional 9. Post-transaction

Source: Lindquist (1974)

Hansen and Deutscher (1977) base their work primarily on the store image dimensions identified by Lindquist (1974) when they examined the importance of different attributes of store image in the different retail sectors of grocery and department stores. Whilst similar attributes are identified for both these sectors, the order of priority is found to be different. In both cases, the most important attribute is the dependability of the product. However, for supermarket shoppers, features that stress utility and time-pressures like store cleanliness, easy accessibility of products and speed of checkout are significant factors. This finding is in contrast to department store shopping, where value for money and product quality are perceived as being important factors.

Greenley and Shipley (1992) also found similar differences between these two sectors and added after-sales service and efficient/friendly sales assistants to the attributes stressed for department stores. Hansen and Deutscher (1977) propose that store image attributes should be prioritised for each retail sector and practitioners should note the most important and least important dimensions to optimise capital investment.

Hansen and Deutscher (1977) observe store image terminology to be confusing and propose a three level classification of image measurement to be used: dimension, component and attribute. By 'dimension' they mean the largest element, for example merchandise; by 'component' they refer to the selection of merchandise; and 'attributes' would signify the brands stocked by the retailer. They suggest that there would be less confusion and studies could be compared if researchers were more specific in classification of image elements.

Greenberg *et al.* (1983) consider store 'product offerings', 'promotional efforts' and 'atmospherics' to be the most important influences on consumer perception, where atmospherics is defined as "the effort to design buying environments to produce specific emotional effects in the buyer that enhance his purchase probability" (Kotler, 1973 50).

Mazursky and Jacoby (1986) suggest that consumers form a set of beliefs about a store and decide whether a shopping environment is reflective of the type of store from which they want to be seen to purchase. Hence, if a retailer can identify those store attributes that appeal to a segment of consumers, it might be possible to manipulate the physical and/or the psychological image components to attract those consumers without loosing the existing customer base. If a retailer uses a marketing strategy with store positioning criteria different from the selection criteria of the targeted consumer, sales may be lost and the marketing budget wasted. Retailers need to know what is important to the intended consumer to maximise the effectiveness of customer communication and satisfaction (Darden and Ashton, 1974; Hansen and Deutscher, 1977; Hirschman, 1979; Malhotra, 1986; Rich and Portis, 1964).

Arnold *et al.* (1997: 112) conducted extensive store choice surveys over two decades across a number of different retail sectors. They propose that differences exist across sectors and that some variances occur within sectors. The primary attributes identified in all sectors were location, price and assortment and the secondary factors were quality, service, value and sales promotions. The order in which these attributes are prioritised depends on the sector. The authors hypothesise that variances within retail sectors relate "to the degree of competitive market structure differentiation, i.e. the extent to which competitors in a particular market differ from each other on a specific store choice attribute". Within fashion retailing this may well be a factor (the above study focused on food retailing) since customer preferences, lifestyles and self-image may dictate to retailers the combination of attributes required by different customer segments.

Empirical findings confirm the significance attached to attributes differs between retail sectors (Alpert, 1971; Arnold *et al.,* 1983; Bearden, 1977; Lumpkin *et al.,* 1985)., but recent results suggest that it is the interaction between these that is important. For example, Sweeney *et al.* (1997) argue that value is the core marketing differentiator in the current retail climate - where 'value' is defined as the trade-off between product quality and price (Dodds *et al.*, 1991; Monroe, 1990; Monroe and Petroshius, 1981) and 'perceived value' is the way the product is influenced by the quality of service provided (Dodds *et al.,* 1991; Sweeney *et al.,* 1997). Product selection and availability of sales assistants are important to time-pressured shoppers, whereas consumers, who perceive fashion clothes shopping as a leisure activity, require service to be friendly and non-pressured with products providing value for money (Hansen and Deutscher, 1977; Mattson, 1982). Consumers also regard fashion clothes shopping as high risk and will purchase goods from stores with a reputation for giving honest advice and good service as well as having a good returns policy (Lewis and Hawksley, 1990).

It is generally agreed that retailer intention of store positioning is not necessarily the same as consumer perception, but that it is the opinion of the targeted consumer that is important and thus, should be identified by the retailer (Greenberg *et al.,* 1983; Kotler, 1973; Rosenbloom, 1981; Rosenbloom, 1983). Moreover, Rosenbloom (1981) notes the difficulty of measuring store image and suggests the relationship between store choice and store image has not been proved in rigorous research.

2.2.3 Store image studies in fashion retailing

A number of specific store image studies have been conducted within fashion retailing, for example women's fashion stores (Lewis and Hawskley, 1990; Marks, 1976; Mason and Mayer, 1973; Paulins, 1993) menswear fashion stores (James *et al.,* 1976), combined women and menswear clothing stores (Lea-Greenwood, 1991), teenagewear stores (Janssen, 1993); westernwear fashion stores (Kuruvilla *et al.,* 1994); and variety stores (Davies, 1992a); but by far the majority of empirical work has been undertaken with department stores (Bellenger *et al.,* 1976; Bloemer and de Ruyter, 1998; Cassill *et al.,* 1993; Golden *et al.,* 1987; Greenberg *et al.,* 1983; Hansen and Deutscher, 1977; Jain and Etgar, 1976; Kunkel and Berry, 1968; Malhotra, 1986; Martineau, 1958; McDougall and Fry, 1974; Peterson and Kerin, 1983; Rich and Portis, 1964; Zimmer and Golden, 1988). Most of these studies have identified specific store image dimensions and evaluated the importance of these for the sector studied and some of them have attempted to analyse how store image affects store selection and shopping behaviour.

Davies and Brooks (1989) point out that stores should aim to have a 'good' image and that this image should differentiate a retailer from its competitors and that merchandise, service and location appear to be the most important image dimensions. The image of a store creates an aura that, in conjunction with the reputation of the retailer, is more important than the actual shopping experience (Schiffman and Kanuk, 1994). Although Bloemer and de Ruyter (1998: 511) argue that loyal customers always have a positive perception of a store because "the effect of the image of the store comes via store satisfaction ... store loyalty is built through store satisfaction. And that satisfaction is built among other things (like emotions, values, attributions, etc.) by store image".

James *et al.* (1976) identify price, assortment, personnel, atmosphere, service and quality to be important dimensions for store choice within the menswear sector. Similar results were observed by Lewis and Hawksley (1990) when they identified three clusters of fashion clothing purchase behaviour. They found merchandise, service and pricing to be important selection criteria as well as the atmosphere of the store, its name and the customer shopping experience.

Conceptual research has identified a number of image dimension, components and attributes influencing shoppers in their purchase decision. The majority of these studies note merchandise characteristics to be the most important factors followed by secondary determinants such as store environment, service or store reputation. Schiffman and Kanuk (1994) conclude that the image of a store may predispose consumers to have a notion of the quality of products they carry, as well as influence them in their decisions of where to shop.

2.3 Measurement of Store Image

Researches have measured store image by applying techniques such as open ended questions, attitude scaling, multi-attribute models, multi-dimensional scaling, and conjoint analysis (Kunkel and Berry, 1968; McDougall and Fry, 1974; McGoldrick, 1990; Zimmer and Golden, 1988). By measuring a store or retail image it is possible to compare it with that of the main competitors or to utilise the results for a longitudinal study.

Zimmer and Golden (1988) point out that although some consumer perceptions of store image are attribute-specific, others have a holistic perception of image and yet others have an apprehension of a behavioural or product/brand related nature. They note that most mentions are affective descriptions and propose that as images are of a complex nature it is difficult for consumers and retailers to describe factors contributing to store image and this in turn makes it harder to measure perception of image. Blawatt (1995) confirms that individuals examining the problem differ in the way they process information. This variance is on a continuum polarised by the categories of the 'imager', who sees things in a visual holistic way, and the 'verbalist', who feels comfortable with using concrete descriptions. Thus, it is important for researchers to consider the design and the measurement techniques of a survey and these must be taken into consideration when drawing conclusions based on the results. These difficulties cause researchers to disagree on how or what to measure regarding store image and may be due to the empirical findings that important image attributes vary between sectors (Amirani and Gates, 1993).

2.3.1 Open ended techniques

In most studies researchers have utilised a limited number of attribute dimensions to compare results with those of close competitors. Hence, the image dimensions to be measured have first to be identified. Zimmer and Golden (1988) recommend employing an unstructured measurement technique using open-ended image data to identify elements of image attributes important to consumers for a specific retail sector. When salient dimensions have been identified researchers can commence to measure the image of a store.

Salient attributes are determined by individuals from factors influencing purchasing behaviour. These factors include the level of involvement, perceived risk, self-image and aspirational image (Hite and Bellizzi, 1985). Furthermore, demographic, socio-economic and lifestyle variables have been suggested to affect purchase behaviour (Arnold *et al.,* 1997; Mason *et al.,* 1983; Schiffman *et al.,* 1977). The attributes most frequently mentioned or ranked highest are identified as being salient image factors. The assumption is that consumers are aware of these and are prepared to state them, but research indicates that some respondents may falsify their answers to improve their own image (Townsend, 1991). McDougall and Fry (1974) point out that open-ended questions demand a good verbal ability from the respondent and this may reduce the reliability of a study. Moreover, the use of unstructured measurement techniques requires difficult coding processes, which may introduce subjectivity in the grouping stages (Amirani and Gates, 1993). Nevertheless, the advantage of using qualitative methods for exploring store image is that it does not limit image dimensions and ensures that variables relevant to respondents are utilised.

2.3.2 Scaling techniques

The semantic differential scale was developed by Thurstone (1929) and improved by Osgood *et al.* (1957). It has been used extensively to measure consumer perception of store image (McGoldrick, 1990) and is administered by applying either a five- or seven-point bipolar scale and with extremes being defined by opposites like 'good value' and 'poor value'. McDougall and Fry (1974), Golden *et al.* (1987) and Cassill *et al.* (1993) utilised various versions of semantic differential scales. The problem with the process is that respondents are uncomfortable in using the negative end of the scale even if this demonstrates an accurate attitude towards the store in question (McDougall and Fry, 1974).

Staple scales have been applied to studies where respondents evaluate the importance of an attribute in describing it by a single adjective and allocating it a value from zero to ten or one to seven, where the higher numbers signify 'extreme importance' (Hansen and Deutscher, 1977; James *et al.*, 1976). By applying staple scales, measurements indicate how well a store fulfils consumer expectation.

Cassill *et al.* (1993) analysed shopping behaviour using a Likert scale where respondents had to agree or disagree with a series of statements. They administered 529 questionnaires to regular shoppers at department stores and attribute dimensions were pre-determined by the researchers. The 84 Likert-scaled items were analysed using factor analysis to enable three department stores to be compared on a number of summarised elements. Studies, administering scales with pre-selected attribute criteria, force consumers to respond to characteristics they might not have thought of themselves. This lack of objectivity can skew the results as they are influenced by the selection of salient attributes (Kunkel and Berry, 1968; Zimmer and Golden, 1988).

2.3.3 Multi-attribute models

The advantage of utilising a multi-attribute model rather than a comprehensive model, such as the Howard-Sheth or EKB model, is the diagnostic power. Findings can be used to formulate marketing strategies in an attempt to change consumer attitudes (Horton, 1984). Being aware of which evaluative criteria consumers value highly and how they rate these for a particular store makes it possible to analyse the effectiveness of existing strategies and evaluate them against new approaches.

Bass and Talarzyk (1972: 93-4) adapted the Fishbein model of Attitude-toward-Object to be suitable for measuring attitudes towards a brand and concluded that it proved to be more reliable in predicting consumer preferences than demographic, personality or general attitude models. It is their belief that the model deals with attitude as an uni-dimensional concept, which provides a holistic measurement of the individual attitude to a brand. They describe the equations as "a function of the relative importance of each of the product attributes and the beliefs about the brand on each attribute".

The adapted model can also be utilised to measure store image as well as brand image, by substituting stores for brands (Ehrenberg, 1988; James *et al.,* 1976). Thus, the model measures store image as a function of the importance of a number of store attributes and the evaluation of these for a particular store. The model is represented by the equation:

$$A_s = \sum_{i=1}^{n} W_i B_i$$

Where A_s = the attitude towards a particular store;

W_i = the weight of importance of attribute i;

B_i = the evaluative aspect or belief towards attribute i for a particular store;

n = number of attributes important in the selection of a given store.

Source: James *et al.* (1976)

Both James *et al.* (1976) and Kuruvilla *et al.* (1994) utilise multi-attribute models for researching store choice for fashion retailers. The model measures store image by analysing the "evaluation of all salient aspects of the store as individually perceived and weighted" (Doyle and Fenwick, 1974: 40). However, the researcher has to establish relevant attributes to be measured either through exploratory research or by selecting attributes established from previous findings. Not all consumers find the same attribute dimensions equally important and market segmentation can be included in store image studies to enable a re-formulation of the marketing strategy (Doyle and Fenwick, 1974; James *et al.,* 1976).

2.3.4 Multi-dimensional scaling

Multi-dimensional scaling (MDS) techniques have been used to make visual presentations of results to advise retailers of their own image and that of the competition. Similarity data are collected for two stores using a scalar instrument and analysed by a MDS programme. The presentation of the results is by a spatial representation to inform interested parties of differences in consumer perceptions between competitors in terms of image dimensions (van Auken and Lonial, 1991).

Doyle and Fenwick (1974) applied multi-dimensional scaling (MDS) techniques to establish a two dimensional perceptual map of store positioning for different grocery outlets. Jain and Etgar (1976) later applied MDS techniques to surveys administered in department stores and presented the results on a three dimensional map.

A major study utilising MDS compared positioning strategies in a number of retail sectors (Davies, 1992a; Davies and Brooks, 1989). These findings were displayed on two-dimensional maps and based on a number of attributes identified to be relevant for each sector. The survey identified the positioning of a perceptual 'ideal store' and compared this with a number of retail companies within the sector.

Although MDS techniques can be employed as a diagnostic tool (van Auken and Lonial, 1991) the spatial representations are difficult to understand. Furthermore, they are based on consumer current store choice criteria, which may well change over time, as well as omitting choice criteria as a result of the prescriptiveness of the technique (van Auken and Lonial, 1991).

2.3.5 Conjoint analysis

Since Green and Srinivasan (1978) applied conjoint analysis to marketing problems, it has become a widely utilised method for understanding and predicting consumer choices and comprehending trade-offs made by customers in their purchase decisions (Louviere, 1994). The most important reason for using conjoint analysis in formulating marketing strategy is its predictive capability in evaluating interacting salient factors. In addition, conjoint analysis allows for segmentation of responses and identification of homogeneous groups within the overall targeted group of customers, potentially enabling more efficient marketing communications based on consumer preferences (Amirani and Gates, 1993; Lockshin *et al.* 1997).

Conjoint analysis enables a concept to be decomposed into a number of variables important to consumers in decision making. It is presumed, that the consumer evaluates store image as a holistic concept and that important factors are appraised as a 'bundle of attributes' (Hair and Anderson, 1985). This type of attribute-anchored conjoint model has the advantage of conceptualising the 'Gestalt nature' of measurement of overall store preference (Green and Desarbo, 1978; Keaveney and Hunt, 1992).

To administer a conjoint survey, a set of profile cards are designed containing all the chosen features, i.e. attribute dimensions. Green (1977) notes attributes chosen for the analysis should be 'benefits' sought from the product or service. Each feature has a minimum of two different levels. Respondents evaluate each profile by ranking these in order of preference or by rating them on a scale. The analysis estimates the contribution of each feature to the decision process and evaluates the trade-offs between a number of specified features at different levels.

For example, a conjoint analysis could identify the trade-off respondents make in store choice decision. The approach involves asking each respondent to express a level of preference for a hypothetical store description, which is summarised in terms of a number of features (for example store location) and stating a specific level for that feature (high street or within an out-of-town shopping centre).

There are five stages in a basic conjoint analysis study (Lehmann *et al.,* 1997; van der Pol and Ryan, 1996):

1. establish attributes;
2. assign attribute levels;
3. design profile cards;
4. design questionnaire and administer;
5. evaluate customer preferences, segment size and utilities.

In the analysis it is possible to determine which features are the most important to customers and also which level of each feature is preferred. By using the results from a conjoint analysis, the retail mix and store positioning can be manipulated by the retailer to suit ever-changing consumer expectations.

By employing this technique to generate market research data it is possible, for fashion retailers, to understand the principal dimensions involved in store choice and to evaluate how customers make their purchasing decisions. The technique, utilised with a small sample of customers, enables identification of individual sub-segments within a large group of customers, which in many cases are believed to be homogenous, that is all with fairly similar demographic profiles and views of the retail chain.

Green *et al.* (1987) compared MDS and conjoint analysis techniques on ski resort shops and observed that the methods were complementary. They pointed out that MDS is better for presentation purposes, where relationships between attributes and stores are displayed as distances on a two or three dimensional map, but that the advantage of conjoint analysis is its ability to make predictions for effective store positioning strategies by analysing the strengths of existing stores and by identifying gaps in the market.

Applied market research studies have used conjoint analytical techniques to evaluate retail positioning for supermarket chains; banks; sports and leisure services; service stations; fast food outlets; convenience stores and the entertainment sector (Johnson, 1997). However, with few exceptions this technique has not been employed in academic studies of fashion retailing, despite the fact that a procedure of this kind could do much to provide a basis for more effective marketing and loyalty-building programmes (Amirani and Gates, 1993; Louviere and Johnson, 1990).

2.3.6 Segmentation

Market segmentation is seen as an essential component of marketing strategy (Doyle, 1994; Kotler *et al.* 1996; McDonald and Dunbar, 1995; Tynan and Drayton, 1987) because it is believed that an understanding of group characteristics is essential for marketing communication and is a basis for forming an effective store image. For example, it has been concluded that segmentation is "one of the most fundamental concepts of modern marketing" (Wind, 1978: 317) enabling the needs of consumers with differing "tastes, needs, attitudes, motivations, life-styles, family size and composition etc." to be met (Chisnall, 1985: 264). Segmentation is of value in defining market scope, for developing organisational policy, for positioning brands and for identifying market opportunities (Baker, 1984; Lunn, 1978; Walters and White, 1987).

Traditionally, segmentation has been pursued by using demographic or geographic variables, although recently psychological, psychographic or behavioural variables have been employed to develop both products and services. Some retailers have also identified similarities within sub-segments of their customers such as lifestyle, shopping behaviour or leisure activities. These factors should not be used in isolation, but information from them can be combined to provide store positioning better suited to a number of customer sub-segments. For example, in fashion retailing increased turnover may be created by adding merchandise lines or outlets to appeal to a new target segment (Cort and Dominguez, 1977). This shift in emphasis is important, as it reflects the move towards defining segments on the basis of behaviour as a more solid foundation for the marketing planning process (Easey and Sorensen, 1995; Kotler *et al.*, 1996). Benefit segmentation is central to fragmenting the target market to provide customers with the advantages they value most. If a retailer knows what the customer wants, an assessment can be made of how closely the brand can be made to satisfy the customer (Easey and Sorensen, 1995). Hence, in fashion retailing, segmentation based on price and quality positioning, which also takes design and style into consideration, is often the primary factor (Wileman and Jary, 1997).

Segmentation studies can help to identify new opportunities for retailers (Easey and Sorensen, 1995; Walters and White, 1987). To be effective segments must be:

- viable - large enough to be potentially profitable;
- identifiable - consumers can be distinguished in terms of address, behaviour, attitudes or lifestyle etc.;
- measurable - numbers of consumers grouped in terms of amount of household income and outlay;
- accessible - consumer groups able to be targeted with sales and promotional effort.

Although, from an academic perspective, market segmentation is a very important concept to marketing practitioners, it appears that retailers do not normally apply these methods at the development stage for a range or a retail outlet (Boedeker, 1995). In contrast, retailers base market segmentation and targeting of customers on a continuous cyclical feedback process, rather than utilising these methods as a precursor to the development of new products (Danneels, 1996). Moreover, profiling of customers is available from EPOS data and can be utilised to build a picture of high spending loyal customers as well as to manage stock levels and distribution in general (Corporate Intelligence on Retailing, 1998).

2.4 Store Image Congruency

Research into store image has undoubtedly served to inform retailers on the positioning strategies for their outlets, enabling them to differentiate their stores in terms of either their products, their prices or the services they offer (Wortzel, 1987). While empirical research has demonstrated a link between product quality and market share (Buzzell and Gale, 1987; Davies, 1992a; Lees and Worthington, 1989) there is less evidence of a clear relationship between store image, store choice and customer loyalty (Berry, 1969; Samli, 1989; Sirgy and

Samli, 1985; Smith and Burns, 1996). Taylor and Baker (1994) set out to test the connection between purchase intention, service quality and customer satisfaction and found that these factors were at best moderators in the final purchase decision. However, a strong market position does tend to lead to greater customer through-flow and hence profitability (Davies and Brooks, 1989).

Osman (1993) has attempted to relate these factors, by proposing that consumer attitudes to store choice are affected by the store rating on each of the contributing attributes. The argument is that if retailers meet or exceed customer expectations it will mean that customers have a positive experience, make repeat purchases and increase their loyalty towards the store. Conversely, a low degree of congruence between the image perceived by the customer and the intended market positioning could, potentially, be an indicator of future problems.

Employee perception of the company image influences not only the way they serve customers, but also the way they discuss the company with their family and friends (O'Connor, 1991). Thus, congruence of image is an important area for further research, as staff have often been shown to perceive their company image differently from that of their customers (McClure and Ryans, 1968; Pathak *et al.,* 1974; Samli and Lincoln, 1989).

Pathak *et al.,* (1974) compared consumer and retailer perception of the image of four department stores. Results indicated that managers had a good understanding of consumer opinion with regard to tangible aspects of the merchandise, but were less certain of customer perception of symbolic factors, such as store atmosphere. Furthermore, Samli and Lincoln (1989) found divergence when they compared retail manager and consumer perceptions. Overall, they found managers to have a more positive image of the store, although on some factors they had a lower opinion than customers. They conclude that total congruence is not likely but highlight the importance of evaluating differences in perception. In contrast, May (1974) identified consumers to have a more favourable perception than managers on many attributes. This is credited to the fact that retailers are in the store regularly and, maybe, have a more realistic view or tend to be more critical than consumers.

Kuruvilla *et al.* (1994) used Likert scale techniques in their survey to evaluate importance and satisfaction levels. This study found that retail employees gave greater importance to merchandise, service and atmosphere and thought store atmosphere more commendable than did consumers. In contrast, customers were in general more satisfied with merchandise characteristics than employees. Overall Kuruvilla *et al.* (1994) discovered a reasonable congruence between consumer and employee perception of store image in contrast to previous studies, which had found that employees consistently overvalued their stores (May, 1974; Pathak *et al.,* 1974; Samli and Lincoln, 1989). Nevertheless, it is recommended that retail companies should assess how well they are anticipating the perceived importance of store image attributes and the extent to which they satisfy their customers by regularly measuring store image congruity (Osman, 1993; Oppenwal and Timmermans, 1997).

2.5 Store Positioning Strategies

> "A company selects its market position as its response to its understanding of the needs, desires and behavioural characteristics of its targeted customers. This requires a coordinated 'statement' to be made to the customer through merchandise selection, trading format, customer services and customer communication."
>
> Harris and Walter (1992:3)

Positioning is defined "as the design and implementation of a retail mix to create an image of the retailer in the customer's mind relative to its competitors" (Levy and Weitz, 1998). Store or brand image acts by communicating social signals of symbolic nature which provide the market positioning of a retailer with psychological importance, as brand ownership transfers the image of the brand to the wearer (Schiffman and Kanuk, 1994). Strategic positioning concerns the identification of image dimensions that add unique value in the eyes of the targeted consumer (Wortzel, 1987). Consequently, understanding the way target consumers react to marketing communications and monitoring their effectiveness have become a focus of research activity.

Jobber (1995) suggests that successful positioning is based on four concepts:

Clarity: The position must be clear to the target market by the way it is communicated to the customer and in the way it offers a differential advantage.

Consistency: Consumers must receive marketing communication, which is consistent and does not change from year to year.

Credibility: The positioning of a brand must be credible to the target market, especially when retailers are trying to change market positioning.

Competitiveness: Two factors are important to fashion retailers: the need to have a stylish image to distinguish the brand from the competition, and the need to have a reputation for product quality which is acknowledged by consumers.

Market positioning, based on price, product differentiation and service provision, is central to the competitive strategy of multiple retailers (Ellis and Kelly, 1992; Walters, 1988; 1994; Walters and Laffy, 1996; Wortzel, 1987). The main technique for determining consumer perception of retailer market positioning is to utilise perceptual mapping. This depicts different retailers over two or three dimensions, such as price, design and quality. The significance is that when the market positioning has been identified and compared with immediate competitors, the retailer can decide how best to reaffirm positioning (Easey and Sorensen, 1995). Focused differentiation is the way retailers can target a market by understanding the life-style of its customers (Porter, 1985). For example, Next for Men, Burton Menswear and Austin Reed each target specific consumer groups by creating a store image, providing a product and offering a service to satisfy their specific market segment.

Strategies to improve the consistency of the merchandise offer and to increase differentiation include (West, 1988):

- Maximise staff training to ensure all employees are competent in achieving agreed service levels. Ensure recruitment procedures and staff motivation obtain commitment to the company.
- Invest in improving product quality and product presentation within the store.
- Centralise the buying and merchandising function for consistency in product availability and quality.
- Invest in technology to increase the speed of check-out.
- Standardise store layout to increase consistency across all outlets.
- Invest in clear labelling and product information to benefits customer self-selection.

In the following sections, fashion retailer strategies are discussed in terms of the main factors identified by Lindquist (1974). These are 'price of merchandise'; 'quality of merchandise'; branding, which includes 'selection' and 'fashion and style'; service provisions; store environment, which includes 'physical facilities' and 'store atmosphere'; and customer communications, which includes 'promotions', 'institutional' and 'post transactions'.

2.5.1 Price of merchandise

The price points of merchandise are important because they can attract or deter the target market. If prices are too low the retailer may send confusing messages and potential customers may view products as being of poor or low quality. In contrast, promoting high price points will encourage consumers to shop around to find products offering better value for money. Some consumers may feel high prices indicate better quality and more exclusiveness (Easey, 1995). In general, consumers perceive a close relationship between price, quality and the image projected.

Verdict (1994) note 'value for money' to be the key criteria consumers use to compare stores. They define value as the balance between price and product quality and include the additional effects of other store characteristics such as selection of stock lines, service, accessibility and store atmosphere. There are two principle ways of changing the 'value' of merchandise to the customer: by reducing price points whilst keeping product quality consistent; or by holding price points stable and improving product quality (Gale and Klavans, 1985).

2.5.2 Quality of merchandise

"Perceived product quality is an idiosyncratic value judgement with respect to the fitness for consumption which is based upon the conscious and/or unconscious processing of quality cues in relation to relevant quality attributes within the context of significant personal and situational variables" (Steenkamp, 1990: 317). Consumer perception of merchandise quality is increasingly important as an element of the marketing strategy for fashion retailers as they find that customers are willing to pay extra for consistently high product quality (Evans, 1995).

In fashion retailing, image positioning is important because the product expresses something about the wearer. The old adage 'we are what we wear' still holds true for fashion clothing. Many consumers buy brands that project their self-image or the image to which they aspire (Hite and Bellizzi, 1985); they do not buy clothes just for the functional qualities they possess (Firat and Shultz II, 1997; Shin and Dickerson, 1999). The individual selection of attire has been described as "a personal signature that symbolically communicates the social identity that a person seeks to project and is a reflection of the personality of the wearer" (Thompson and Chen, 1998: 162). Thus the quality of the purchased fashion clothing is important as it communicates something about the wearer.

2.5.3 Branding

The concepts of branding of national and private labels have been extensively researched (de Chernatony *et al.,* 1994; de Chernatony and McDonald, 1992; Doyle, 1991; Macrae, 1996; Randall, 1997). Such studies have focused upon the grocery sector with less investigation of the issues for fashion retailers (Moore, 1995). Successful brands in fashion retailing create an image or are perceived by the consumer as having a 'personality' (Doyle, 1991). De Chernatony and McDonald (1992: 237) define a brand as "an identifiable product, service, person or place, augmented in such a way that the buyer or user perceives relevant, unique added values which match their needs most closely". The interacting attributes, which contribute to this image of a brand, are formulated from factors important or aspirational to the consumer (D'Arcy *et al.,* 1989). It is these points of difference that influence customers to look for a particular product and even to be prepared to pay a premium price (Evans, 1997).

These factors can be functional and tangible, such as product quality and durability. Often they may be tenuous and symbolic such as fulfilling a status or satisfying an emotional need (Jones, 1986). The attributes or points of difference define the product in the mind of consumers and give an image or an aspirational lifestyle to which the customer can relate (Evans, 1989). When a brand is communicated through advertising, packaging and merchandising, it aims to create confidence (Doyle, 1991) and minimise the purchasing risk to the consumer. Such attributes, it is held, are particularly important when buying fashion products (de Chernatony and McDonald, 1992). When a brand is successful, it can command a premium, allowing the retailer greater opportunity to maximise profitability with less need to discount prices (Doyle, 1991). Moreover, lifestyle branding sends out social signals, which can incorporate symbolic connotations of status and affluence and are utilised to attract customers by attempting to satisfy these aspirations (Fernie *et al.,* 1997; Lewis and Hawskley, 1990).

For fashion retailers, maintaining a sustainable competitive advantage will be dependent upon translating company core values into a coherent brand strategy. De Chernatony and McDonald (1992) maintain that a retailer may adopt either an *added value* or *cost driven* strategy. Value added brands are positioned to exceed the functional value of the product. Applied to fashion retailing, this may be achieved through innovations in style and design, by improvements in product quality or through store ambience. Staffing levels and the provision of skilled and knowledgeable staff may also be considered important.

In contrast, a cost driven strategy attaches little symbolic value to the product. Low price remains the primary focus and is achieved via bulk orders, less work on individual garments, cheaper materials and by limiting ranges. Costs driven strategies are reinforced at store level by reduced staffing, provision of minimal staff training and tight management control. Davies (1992b) maintains that to be deemed a brand, as opposed to merely a product label, a product or retailer must satisfy four criteria:

- Does the consumer differentiate the brand positively in comparison with the main competitors? (Differentiation)
- Has the brand an image for quality that enables the retailer to command a premium price? (Premium price)
- Can the brand be valued, used, sold or licensed separately from the business owning the brand name? (Separate existence)
- Does the brand offer augmented symbolic value to the customer? (Psychic value)

A successful brand should meet all these criteria otherwise the name can only be perceived as a label for different ranges. There is anecdotal evidence that it is only the store name which is able to command a premium price (Davies, 1992b). Clive Vaughan, retail analyst with Verdict Research, confirms that "Own label can't be a cheap 'me too'. It's got to be a genuine product with its own signature" (Rees, 1997). Brands themselves can be divided into two broad categories: national or manufacturer brands and retailer brands.

National / Manufacturer brands: These are designed, manufactured and in the majority of instances, marketed by the supplier. The objective is to establish an image and create a demand for the product by communicating directly with the consumer (Levy and Weitz, 1995; Randall, 1997). Suppliers of national brands have to build in cost to cover advertising and promotion. However, these ranges stocked by a number of retailers in the same area can lead to increased competition and reduced margins. Hence, many UK retailers have decided to invest in their own retail brand, which at the same time improves gross margin.

Retailer brands: Historically, private label or own-label merchandise has had a poor image and been perceived by the consumer to be of a lower quality than national brands. However, in recent years retailer brands have improved greatly (Davies, 1992b). In the fashion sector this has been due primarily to retailers becoming more involved in product creation and investing in their own design, buying and marketing teams (Levy and Weitz, 1995).

Fashion retailers have the choice of selling either national or private label brands or a combination of both. The retailing of own-labels can increase the control the retailer has over the supply chain allowing greater direction to be exercised over the choice of fabrics, make-up, quality control and distribution. It also provides the retailer with an intangible symbolic differentiator that is difficult to replicate (Moore, 1995).

Although the retail outlet may be a brand, some retailers prefer to develop a number of lifestyle brands that target different customer groups. For example, certain fashion retailers use the store name as the product name and only promote the one brand to their targeted customers. A typical example of this is Next Retail Ltd. with their label 'Next'. In contrast, the Arcadia outlets prefer to promote a combination of national and own label brands.

A survey conducted by Kurt Salmon Associates to identify how different management techniques correlated with financial returns for European clothing retailers, acknowledged that "the most successful companies are those that have tight financial controls and which remain focused with relatively few brands and a clear target market" (Taylor, 1997: 25).

Retail branding is concerned not only with the branding of products and services offered by the firm, but with the retail company as a whole and is crucial since many customers purchase brands not products. It involves the development and maintenance of product and company values and beliefs that are coherent, appropriate, distinctive and attractive to customers in their attainment of differentiation and customer loyalty (Murphy, 1992). These values and beliefs in the brand are communicated to the customer via product quality, packaging, product presentation and store environment (Aaker and Biel, 1993; Fernie *et al.,* 1997).

2.5.4 Service provisions

Service quality is a contributor to consumer perception in all interactions between customers and staff and these evaluations contribute towards the perceived image based on a number of store visits (Bitner *et al.,* 1994). Many consumers do not have the time to compare product quality, but may rely on friends or sales staff to influence them. Advice to the consumer may help to sell the merchandise, particularly if the purchase is perceived as being of a high-risk nature. Thus, it is not surprising that many multiple retailers are turning to staff service provision to differentiate themselves in the high street (Turnbull and Wilson, 1989). It has also been acknowledged that customers have different needs and that retail employees need to adapt their approach to customers to satisfy individual requirements (Beatty *et al.,* 1996). In addition, the cost-benefit ratio of enhanced service provisions needs to be estimated and controlled since additional services may in effect reposition the company or not be required by the target customer.

Service is accepted as being a key differentiator between retailers (Zeithaml *et al.,* 1990). Increasing loyalty and retaining customers is understood to be more efficient than developing new customer business (Gould, 1995). In trying to manage service it becomes important to decide whether to prioritise the hard or the soft factors. Some companies stress the hard factors of customer segmentation and communication; measuring service standards; benchmarking; information management; and procedural systems. Others emphasise the soft factors and point out the significance of customer relationships; listening to customers; culture of organisations; empowerment; support systems and appreciating staff contributions (Cook and Macaulay, 1997; Cunningham *et al.,* 1996; Stauss and Weinlich, 1997). For example, recent profit warnings from Marks & Spencer have led Mr Salsbury, the chief executive, to state that the company "needs clearer lines of communication throughout the business and shorter reporting lines to the board" as well as recommending that "decision making will be devolved, enabling us to respond more effectively to our customers and to compete better in all our markets" (Rankine, 1999c).

In retailing the soft factors of customer service are difficult to manage and are the real differentiators between retailers. Creating an acceptable working environment in a company where the lowest paid staff have the highest contact with customers is vital (Richer, 1996). A strong culture in itself is not enough, it must also be relevant for the situation (Payne, 1991). The customer service level provided by any organisation cannot be imposed on staff, it is a result of the culture, the company structure and the human resource policy (Broadbridge, 1996b). Staff have to enjoy work and be motivated to provide excellent customer service. Empowerment can aid employees to be motivated (Foy, 1993), but suitable reward, staff development and communication systems also have to be in place (Choppin, 1997; Stauss and Weinlich, 1997; Thomason, 1988).

Service orientated companies find it beneficial to develop staff entrepreneurial skills and empower employees to make decisions as if the business was their own. Empowerment is defined as "the total enabling of individuals to succeed in areas owned by the individual, for the good of the whole organisation" and it is suggested that empowerment only works in companies having a culture designed to permit decision-making at the lowest level (Choppin, 1997: 202). There are three inter-linked strategies encouraging the development of an empowered, customer focused workforce: selection and recruitment; staff development; and team organisation (Boshoff and Mels, 1995; Broadbridge, 1996b; Cunningham *et al.*, 1996).

Customer complaints are important in any organisation. By monitoring the type of complaints and reacting to them quickly retailers can minimise future complaints and customer dissatisfaction (Easey, 1995). Refund or complaint policies are marketing tools that lead to increased loyalty if dealt with to the customer's satisfaction (Ward *et al.*, 1998). Refund and exchange policies are very similar in all the major fashion retailers, the main difference is the way these policies are implemented at store level. In reality, if customers feel they have been treated badly or made to jump through unnecessary hoops when returning goods, they are unlikely to shop with that retailer again. Companies recognise the importance of the lifetime value of a customer and realise that retaining customers is a good investment (Duffin, 1997; Gould, 1995).

Although both quality and price and, therefore, value are still very important, service is becoming the most significant differentiator, particularly in fashion retailing where staff can have high customer contact (Broadbridge, 1996b; Evans, 1995). The real key to increasing customer satisfaction is to "balance customers' expectations and perceptions and close the gaps between the two" (Zeithaml *et al.*, 1990: 33).

Paul Smith, one of Britain's most successful fashion designers who promotes his designs in over 200 of his own international outlets, most of which are located in Japan, attributes much of his company success to the people employed in the business (Smith, 1996). He suggests that it is crucial to have a flat management structure and to train and empower people to provide a high standard of service (Rawlings, 1996). This link between personnel practices and financial results is confirmed by a recent study at Warwick Business School. It compared human resource polices for 139 UK quoted companies and identified a relationship between productivity and organisations using 'complementary' practices of incentive remuneration, job security, flexibility, employee communication systems, skills training and team working. The research suggests that companies implementing all of these applications can increase productivity by up to eight per cent compared to firms with less systematic and structured human resource routines (Walsh, 1998).

2.5.5 Store environment strategy

Store design is being used as a competitive tool to attract customers to a retailer with a clear identity (Baker *et al.,* 1994; Corporate Intelligence on Retailing, 1998), to develop customer loyalty and to maximise profit potential (Thomas-Emberson, 1998). Customers evaluate the total product offer, which incorporates both the merchandise and the store environment, and thus the setting in which it is sold will influence the perception of a brand (Akhter *et al.,* 1994; Kelley and Hoffman, 1997).

Fashion retailers find window displays the most important way of attracting potential customers into their store as it is the initial communicator of retailer brand image (Moore and Lochhead, 1998). Retailers now design their windows to allow passers-by to see the store interior behind the displays. Store layouts are important in projecting and reinforcing the image and thus, influencing the purchase decision. The retail environment attempts to create an atmosphere or a 'mood' that induces the customer into purchasing. Some studies have suggested that consumers enjoy surprise, innovation and intrigue and this has led to fashion retailers having frequent store refits to create clear, distinctive and memorable brand identities (Dooling, 2001; Bruce and Cooper, 1997; Fitch and Woudhuysen, 1987; Moore and Lochhead, 1998). Verdict (1994: 8) confirms that there are still opportunities for fashion retailers to differentiate "by style, both in terms of store design and garment cut"; but Conran suggests that there is a growing awareness that shop fittings are secondary to the merchandise (Thomas-Emberson, 1998).

Sometimes a brand needs to be repositioned due to poor sales performance or changes in customer requirement. Retailers can change their market position by identifying new target markets or by gaining differential advantage. Intangible repositioning can be made by changing branding, level of customer service, store environment or customer communications (Sharp, 1996). Davies and Liu (1995) argue that well trained staff and store design are two efficient techniques for successful repositioning in contrast to media advertising, which appears to be less effective. Management of the Lewis Trust Group successfully changed the positioning of Chelsea Girl and Concept Man by designing ranges to appeal to slightly older age groups, increasing price points and investing in new shop designs (Lea-Greenwood, 1991). Design has become part of the business strategy to optimise profit potential by attracting new and retaining existing customers. Design has brought added value to the shopping experience (Thomas-Emberson, 1998). "Successful retailers are those who have created an image that is readily understood by their target market. Although difficult to define, image is the clear expression of a corporate philosophy based on a particular business ethics: design being a means of realising it" (Healey & Baker, 1985 :125).

2.5.6 Customer communication

Customer communication to identify expectations and needs is an important part of any marketing communication strategy. It is not enough to monitor and analyse complaints and compliments, forward looking companies set up systems to encourage customers to voice their views on satisfaction with the company, its products and service and to seek suggestions on how customer satisfaction might be increased (Cook, 1997). One such solution has been to improve in-store communication via better merchandise labelling to explain features and benefits of new products, fabrics or finishes as well as providing care instructions. Thus, customers can obtain information without having to approach staff.

2.6 Conclusion

Retailers need to understand the image consumers have of the company and its stores. Lindquist (1974) identified nine physical and psychological dimensions contributing towards consumer image formation and established that merchandise characteristics, customer service and store environment to be the most important components. Hansen and Deutcher (1977) tested these dimensions and found regular customers in different retail sectors prioritised attributes differently. Furthermore, recent research has indicated that customers from different retailers within a sector perceived combinations of attributes to be distinct for each store (Arnold *et al.,* 1997).

Martineau (1958) proposed that a store projecting an image close to the targeted customer self-image would increase loyalty towards the retailer. The link between store image perceptions and customer loyalty has been commonly accepted (Kerin *et al.*, 1992; Osman, 1993). Studies suggest that attitude to a store is created by the composite of consumer purchase expectation and actual purchase experience. Customer satisfaction is forged when retailers manage to prioritise store image characteristics the way customers demand. Thus, store image is here defined as *the total conceptualised perception that a person associates with shopping at a particular store, grounded on a combination of functional and psychological attributes deemed important to the individual.*

Researchers have found it difficult to compare store image studies due to the variety of method and research designs utilised in studies such as multi-attribute models, multi-dimensional models and conjoint analysis. Moreover, some of these studies have utilised predetermined attributes, and thus, included attributes that may be irrelevant to the customer leading to distortions of the findings. Multiple fashion retailers conduct market research, on a regular basis to evaluate customer attitudes towards the product and service provision. There is some evidence to show that measuring the importance of different attributes is not always satisfactory since respondents are inclined to assess everything as relatively important and, hence, results provide minimal variance (Johnson, 1997). This is why more sophisticated survey techniques such as conjoint analysis prove valuable. Furthermore, segmentation research can help inform retailers on the requirements, behaviour and attitudes of their targeted customers.

Consumers purchase from stores that come closest to the individual specification of determining choice factors, such as 'value for money' and 'perceived value'. These concepts influence retailers in deciding their strategy for the retail mix of product quality, service provision and store environment that will best satisfy their target market.

CHAPTER THREE

TRENDS IN FASHION RETAILING

3.1 Introduction

This chapter examines the trends in fashion retailing during the last three decades and contextualises the research. The first half outlines the contemporary issues in UK retailing of market concentration, consolidation, retail location and internationalisation. This is followed by an examination of the different sectors promoting menswear fashion clothing and concludes with an examination of issues specific to consumer purchasing of this type of product.

3.2 Contemporary Perspectives in Retailing

Retailing is very important to the UK economy as 17 per cent of the available workforce, nearly four million people, are employed within the wholesale, retail, trade and repair sector (Employment Gazette, 1997) and over two million people, approximately 12 per cent of the labour force, work in retail related jobs (Nielsen, 1993). Furthermore, a third of national output comes from the retail and distribution sector (Gardner and Sheppard, 1989). As such, retailing contributes to the economic and social stability of the country.

Since the 1960's retailing in the UK has undergone an exceptional transformation. In the post-war period, the consumer was conditioned to rationing and retailers were in a strong marketing position (Kay, 1989). The abolition of Resale Price Maintenance in 1964 encouraged retailers to invest in larger shops, resulting in economies of scale and greater buying strength (Akehurst and Alexander, 1995; Monopolies and Mergers Commission, 1981). The outcome was the dynamic development of regional and national multiple retailers and the demise of many independently owned outlets.

Greater competition in the 1980's forced retailers to improve their understanding of customer needs and to design products and a selling environment for their target market (Bubb, 1992). As consumer expectations continued to increase and diversify, retailers have had to target an increasingly fragmented market (Dawson and Broadbridge, 1988; O'Brien and Harris, 1991; Walters and White, 1987). This fragmentation is, in part, due to cyclical economic factors, which have affected the level of disposable income and consumer expectation of discretionary purchases (Dawson, 1995).

During the 1990's clothing sales increased by value, year on year (Table 3.1). The exact turnover of the clothing market is difficult to categorise due to the variety of outlets selling clothing, which vary from specialist fashion retailers, variety retailers and department stores to supermarkets, craft outlets and car boot sales. Some reports include sales of all textiles, such as shoes and accessories as well as childrenswear and household textiles making comparison difficult. Mintel defines the clothing market to be all men's and women's underwear and outerwear from all outlets (Mintel, 1997d). Furthermore, they identify a multiple specialist fashion retailer to be a chain of stores selling clothes for a particular target market either in stand alone outlets or as concessions in larger stores not necessarily owned by the specialist retailer (Mintel, 1995b).

Table 3.1 Consumer spending on women's and men's clothing (1992 - 97)

	Womenswear		**Menswear**	
	£m	**Percentage annual change**	**£m**	**Percentage annual change**
1992	10,355	-	5,147	-
1993	11,100	+7.2	5,515	+7.1
1994	11,726	+5.6	5,673	+2.9
1995	12,273	+4.7	5,887	+3.8
1996	13,112	+6.8	6,278	+6.6
1997 (est.)	13,590	+3.6	6,430	+2.4

Source: Mintel (1997d)

3.3 Market Concentration in Fashion Retailing

Retailers are normally categorised in terms of the number of outlets they operate, that is into 'single outlet' retailers, 'small multiples', with between two and nine outlets, and 'large multiples', with ten or more outlets (McGoldrick, 1990).

The structure of retailing is defined "as a snapshot of the state of play in the competitive struggle between retail companies and businesses, each of which is seeking not only to survive but to grow" (Akehurst and Alexander, 1995: vii). This contest has led fashion retailing in the UK to become the most concentrated in the world (Smith, 1996), with multiple specialist retailers, such as Benneton, Next and Arcadia, variety retailers, such as Marks & Spencer and Bhs, and department store retailers, such as Debenhams and House of Fraser being responsible for over 50 per cent of the womenswear, menswear and childrenswear clothing market (Table 3.2) (Mintel, 1997d; Willans, 1995).

Table 3.2 Retail distribution of women's and men's clothing by outlet type (1996)

Outlet type	Womenswear		Menswear	
	£m	Percentage	£m	Percentage
Multiple specialists	3,409	26.0	1,563	24.9
Variety stores	2,767	21.1	1,199	19.1
Independent specialists	1,600	12.0	1,099	17.5
Mail order	1,377	10.4	377	6.0
Department stores	1,233	9.4	441	7.0
Discounters/factory outlets	446	3.0	669	10.6
Others*	2,280	17.4	992	15.8
Total	13,122	100.0	6,278	100.0

Source: Mintel (1997d)
Note: Data may not equal totals due to rounding
* Including supermarket chains, airport shops, market stalls and other non-specialist retailers

Retail concentration is measured by the market share held by the multiple retailers (Alexander, 1997). Sales from the top 101 clothing and footwear companies, with turnover in excess of £4.5 mn., accounted for 73 per cent of sector sales in 1996 (Corporate Intelligence, 1997d). The forecast is that multiple retailers will increase their domination of the market by opening additional outlets at the expense of the independent fashion retailers (Mintel, 1997d). In 1994, the seven largest retailers in the sector, Marks & Spencer, the Burton Group (now Arcadia and Debenhams), Sears, C&A, Storehouse, Littlewoods, and Next had in excess of 45 per cent of total sales (Corporate Intelligence, 1997d). Two companies, Marks & Spencer and the Burton Group, controlled about a third of UK fashion clothing sales (Broadbridge, 1996a; Mintel, 1997a).

The multiple retailers' increase in market share was partly a result of mergers and acquisitions. Between 1980 and 1987 retailers spent £8.5 billion in take-overs and mergers across all sectors (O'Brien and Harris, 1991). Within fashion retailing this was exemplified by Burton Group merging with Debenhams in 1985 (Retail Trade Review, 1996) and Next Retail Ltd. purchasing Combined English Stores and Grattan in 1987 (Next, 1987).

Later, Marks & Spencer acquired 19 stores from Littlewoods in 1997 as part of their expansion plans (Mills, 1999a).

The implication of this concentration was two-fold. First, amalgamation in the 1980's led to fewer multiple fashion retailers trading on the high street. Moreover, multiple retailers had a tendency to adopt similar store designs and operational systems and consequently, outlets became increasingly uniform with retailers providing products and services which were alike (Akehurst, 1995; Boedeker, 1995; Newby, 1993; Walters and White, 1987). Secondly, the average size of outlets increased to provide the retailer with economies of scale, increased control over the distribution chain and the possibility of investing in technology (Davies, 1992a; Sparks, 1988).

In the pursuit of market share, sales turnover and profit margin, a number of multiple fashion retailers chose to diversify from their core operations and to exploit alternative market opportunities. For example Marks & Spencer opened food halls and Next Retail Ltd. launched menswear, childrenswear, home furnishings and jewellery departments. This strategy provided the opportunity for the retailer to increase the overall transaction value with existing customers and also to attract new customers to the store. In contrast, other organisations identified promising opportunities by specialisation in niche markets. These included retailers such as Tie Rack and Knickerbox. Similarly, the Burton Group utilised their growth to increase sales by targeting different customer segments with focused retail outlets, such as Top Shop/Top Man for the younger customer, Dorothy Perkins and Burton Menswear for the slightly older age group and Evans for the outsized market (Burton, 1996).

In the 1990's, as fashion multiples converged in the eyes of the consumer, differentiation has been sought either through competitive price points or by retailers augmenting the product or service provision by creating an aspirational image. This has provided an opportunity for smaller independent and designer led retailers to target the more discerning up-market customers. These smaller retailers have often located their stores in secondary sites within city centres or on the edge of town (Dawson, 1995). The consequence of this polarisation has been the decline of the medium-sized retailer (Brown, 1995a; Kirby, 1976).

In order to clearly differentiate and state market position, many fashion retailers have moved away from competing mainly on price to promote non-price factors such as quality, design and fashion (Easey, 1995; MTI, 1998). Moreover, there has emerged an expectation from consumers, that to purchase fashion clothing should be a pleasurable experience in comfortable surroundings and, as such, has become a leisure activity (Dawson, 1995; Newby, 1993).

In the late 1990's, the strategy of some of the larger retail groups has been to de-merge or sell off non-core areas of the business. For example, the Burton Group de-merged into Arcadia and Debenhams in January 1998 (Hall, 1997a) and the Sears Group has disposed of many of its shoe outlets (Miller, 1998) and sold its fashion clothing outlets in 1999 to Arcadia. Arguably the similarity of the large multiple specialist fashion retailers has provided an opportunity for some smaller multiple fashion retailers, such as Jigsaw and Monsoon, to promote a specific brand image, which appeals to a large enough segment of the market to be profitable (Mills, 1999b).

3.4 Consolidation

Following the recession of the early 1990's many fashion retailers have been forced to consolidate their operations. To achieve the desired financial outcomes strategies have had to be designed in terms of the product or brand; human resources; and the store environment.

3.4.1 Product strategy

According to 'the wheel of retailing' (Hollander, 1960; McNair, 1931; McNair and May, 1976), sales strategies follow a cyclical pattern moving from price-based, low-margin, high-turnover goods to service-oriented, high-margin, low-turnover products (Brown, 1995a). During times of recession sales of womenswear continued to increase but sales of menswear declined, thus competition on price becomes particularly prevalent (MTI, 1998). In contrast, during periods of growth retailers focus on strategies to satisfy customer expectations for higher quality and variety of products (Dawson, 1995, MTI, 1998; Dawson and Broadbridge, 1988).

National multiple fashion retailers operate in an environment characterised by high levels of market concentration, centralised control and format standardisation (Davis, 1997; Evans, 1997; Moore, 1996). Consequently, these retailers have two main choices when deciding buying strategy: they can have their own design team with garments made up either in their own factories or subcontract their designs to UK or overseas manufactures; alternatively they can purchase garments designed and made up by other companies (Easey, 1995; Tse, 1985). For example, River Island and Next Retail Ltd utilise the first strategy and Marks & Spencer the second (Jagger, 1999; Lea-Greenwood, 1991; Next, 1995). The role of the designer is vital to the success of any fashion retailer or manufacturer. Their task is to translate current designer fashion influences into ready-to-wear product lines, which are coherent in terms of product characteristics, such as quality, styling and assortment. Moreover, ranges have to communicate the brand image and be suitable for the target market (Atkinson, 1995; Moore and Shearer, 1998; MTI, 1998). Consequently, in-house design teams are argued to be the most important factor in creating a strong and successful own-brand label (Moore and Shearer, 1998).

Consumer opinion today is paramount and is exemplified by the need for fashion retailers to sell specialised merchandise, in short runs to niche markets (Thompson, 1993). Furthermore, fashion retailers must not carry too much stock, since changes in consumer expectations have reduced the quantity of each line that the retailer can reasonably expect to sell at full price. Consequently, the large multiples have developed close relationships with their suppliers and, by sharing sales information, can react to fashion changes. Fashion retailers have increasingly been able to improve the design and style of garments and to negotiate shorter production runs with manufacturers (Easey, 1995). The large multiples are acknowledged to have significant control over the supply chain in terms of costs, design input and the speed and flexibility of physical distribution (Hines, 1995; MTI, 1998). Furthermore, they have been able to reduce lead-time to four weeks from a traditional twelve weeks when using UK suppliers. Companies importing goods have to order well in advance of the agreed delivery date. The balance between supply and demand is crucial, as retailers experienced to their cost during the late 1998, when a large amount of overstock led them to move into 'sale mode' prior to Christmas resulting in decreased margins (Rankine, 1999b).

3.4.2 Human resource strategy

In the early 1990's, the recession increased pressure on management to control costs whilst at the same time increasing opening hours. This compelled companies to negotiate new employment contracts to allow greater flexibility in working hours by reducing the number of full-time staff and employing more part-time, and hence, more flexible but less experienced staff (Alexander, 1995a; Dawson, 1995; Freathy and Sparks, 1996; Warnaby and Woodruffe, 1995). Increased flexibility enabled change to be made quickly and reduced cost (Freathy and Sparks, 1995). However, part-time staff requires equivalent training and pro-rata benefits if they are to give comparable performance.

One of the primary objectives of human resource management is to increase employee productivity, that is the ratio between sales turnover or profit and the cost of employees to the retailer (Walters and Laffy, 1996). One way in which this may be achieved is by the recruitment of quality personnel. Richer (1996) maintains that the recruitment of sales staff should focus on people with good interpersonal skills rather than selection based on previous retail experience. This is particularly important in fashion retailing where customer contact is high and some customers demand personal service. Consequently, retailers have to choose a strategy consistent with customer expectations to achieve competitive advantage (Warnaby and Woodruffe, 1995).

Current opinion is that enlightened organisations are working towards devolved and decentralised decision making, and that large firms cannot afford to maintain bureaucratic structures and procedures (Thompson, 1993). Flat organisational structures benefit retailers, not only by making them more economical to operate by de-layering management and making the company leaner (Freathy and Sparks, 1995), but also by being more efficient in terms of communication: upwards, horizontally and downwards (Naisbett, 1982; Thompson, 1993). Thus, some companies have delegated accountability to independent units, as the drive and initiative to move the business forward comes from the people close to the customer, not from the centre (Broadbridge, 1998; Handy, 1989). This is particularly pertinent to fashion retailing where consumer preference is paramount. These new structures are based on employee agreement of the company culture and give staff professional autonomy within a tightly controlled framework facilitated by developments in computerisation and telecommunication to allow the centre to concentrate on strategy, while tactical and operational management is decentralised (Hyman, 1988). This can cause problems in the separation of execution from conception, that is the extent to which store management and staff implement polices and procedures issued from the centre. However, operational tasks in decentralised organisations can be evaluated against performance criteria, which are both task and behaviour oriented (Thompson, 1993), in addition to assessing the financial results against budget forecasts.

Staff retention is a problem for many retailers. A survey, conducted on behalf of Reed Personnel Services in 1998, found that the average staff turnover was three times higher in retailing than in manufacturing. Career prospects and progression were quoted as the main reason, followed by remuneration (Anon, 1998b). Many retailers have tried to stabilise staff turnover by improving training opportunities and job grading in the belief that if employees feel valued and the company is prepared to invest in their development, they are less likely to move (Broadbridge and Davies, 1993; Porter, 1997b).

3.4.3 Store environment strategy

Previous research has highlighted the importance of the design contribution to the creation of fashion retailer brand image and identity (Lewis and Hawskley, 1990). Developments in store design have emphasised comfort and simplicity and store layouts have been created to facilitate customer flow and to provide guidance and information to the consumer (McGoldrick, 1990). Image led retailing, (that is companies who attract customers though a combination of interacting factors such as design, service and merchandise) emerged as a strategic concept with the launch of Next in the early 1980's (Mort, 1996; Davies, 1989). The design of the stores and the way they are merchandised presents a visual message about the brand values of the retailer and the merchandise offer and, as such, the function of design is used to add value to the product, the environment and the shopping experience (Forty, 1989). Retailers such as Jigsaw and The Gap base their image on a strong design concept to project and reinforce their market positioning and to influence the purchase decision. The interplay between concentration and standardisation has compelled some smaller fashion retailers to develop branding strategies, which communicate individuality to their target audience. For example, management at Jigsaw believe that the stores should reflect regional differences and be designed to attract the local market (Willans, 1995, MacLeod, 1998). Paul Smith states that retailers have to 'think globally but act locally' by having different types of stores, eye-catching windows and unique stock specifically targeted to differentiate in each area (Smith, 1996). In contrast, the major multiples utilise centralisation to keep store formats, windows and management systems to a specified standard to make all outlets look the same.

At the same time as investing in shop design retailers have also increased the average size of outlets to develop economies of scale (Sparks, 1988) and increase market share (MTI, 1998). This is in part achieved by reducing stock levels held in the outlets and storing stock in regional or central distribution centres. However, this requires the retailer to have an efficient computerised stock management system (Christopher, 1992).

3.5 The Trend of Edge-of-town and Out-of-town Shopping Locations

Economic trends have shown real spending increases on household goods and fashion products in the late 1980's, in proportion to consumer outlay on food (Musannif, 1988). These trends follow a cyclical pattern influenced by the nation's economy, taxes, interest rates, consumer credit, property values and unemployment figures (Dawson, 1995). Similarly, the increase in disposable income has led to growth in car ownership and access to shopping by car and this has extended the distance consumers are prepared to travel for fashion clothing purchases and thus the patronage of out-of-town or edge-of-town shopping centres (McGoldrick, 1990). Simultaneously, the high street, traditionally the centre for retailing, has declined in attractiveness to the affluent mobile shopper, who prefers regional or out-of-town shopping centres (Bromley and Thomas, 1993).

The trend of selecting retail locations away from the high street has taken place in three phases during the last thirty years (Schiller, 1986; Thomas, 1989). The first development was the establishment of supermarkets and hypermarkets with adequate parking facilities on edge-of-town brownfield sites. The second phase featured the move of DIY stores and large goods retailers, selling furniture and carpets, into retail warehouses. The third phase signalled the development of out-of-town shopping centres, which offered multiple specialist retailers the opportunity to move into purpose built formats. At this stage, Marks & Spencer announced it was going to invest in out-of-town locations as well as in city centre sites

(Fernie, 1998) which made other multiple fashion retailers follow the same dual location strategy.

The first out-of-town shopping centre to open was Brent Cross in London in 1976 (Miller *et al.*, 1998) followed by the Metro Centre in Gateshead in 1986 (Thomas, 1989). Both promoted the idea of family 'shopping' as a leisure activity. This was the first time that fashion retailers considered store location feasible away from the high street. After the success of Brent Cross and the Metro Centre, other large out-of-town centres opened such as the Merry Hill Centre in Dudley (1989) Meadowhall in Sheffield (1990) and Lakeside in Thurrock (1990). Shoppers have been attracted to these large shopping and leisure environments and it has been claimed that sales turnover in the Metro Centre and Meadowhall exceeds the sales in the local city centres of Newcastle-upon-Tyne and Sheffield (Mintel, 1995b). This trend has been particularly beneficial to multiple specialist retailers since they can afford the fixed costs of locating in out-of-town centres, but is to the detriment of independent retailers (Mintel, 1995b). Multiple fashion retailers and department stores are now perceived to be attractive anchor tenants and are offered favourable contracts as they draw additional custom to a centre. Moreover, these shopping malls offer a mix of multiple specialist fashion retailers for comparison shopping as well as leisure facilities and food courts to attract shoppers (McGoldrick and Thompson, 1992).

Research conducted on behalf of Marks & Spencer found that shoppers for fashion clothing purchases are prepared to travel on average up to 30 minutes compared to just 20 minutes for food shopping (Trefgarne, 1998). Furthermore, Miller *et al.* (1998) confirm the reasons that consumers give for using out-of-town or edge-of-town shopping centres to be convenience, safety, cleanliness and choice by providing comparative retail outlets under one roof as well as offering a leisurely shopping environment and free car parking facilities.

Recent legislation has sought to confine the expansion of out-of-town centres (Worthington, 1998). The government, in its Planning Policy Guidelines (PPG6), has limited retail activities to existing town centres unless an indication of significant growth in the population or retail expenditure is manifest and where investment in the town centre is unlikely to be seriously affected by new development (Miller *et al.*, 1998). Furthermore, green belt land is to be protected and the use of private transport minimised in favour of public transport (PPG13). The PPG6 has encouraged planning authorities, city centre management groups and retailers to revitalise city centres by creating new public open spaces; improving streetscape, cleanliness and security using CCTV; and providing park and ride schemes in order to bring back local shoppers lured away by large out-of town developments (Miller *et al.*, 1998; Worthington, 1998). Traditionally, fashion retailers have always had their place on the high street, even if most of the multiple specialist retailers have seized the opportunity to open additional outlets in shopping centres.

Consumers have indicated they prefer to shop in an environment that is suitable for all ages, is safe and provides choice. This has encouraged shopping centre management to promote 'families values' to attract all consumers. The strategy of providing safer shopping for the majority of middle-class consumers is to the detriment of the young and the unemployed, who may lack opportunities or resources to shop in these centres (Miller *et al.*, 1998).

3.6 Internationalisation

International retailing is defined 'as the operation, by a single firm, or shops, or other forms of retail distribution, in more than one country' (Dawson, 1993: 26). Retail internationalisation takes place in two principal ways: first, sourcing of goods from external markets and second, the operation of retail outlets in more than one country (Dawson, 1993).

3.6.1 Sourcing of goods

Sourcing of garments from international markets has taken place for many centuries; for example, silk from the Far East. Recently, mass produced goods have been imported, due to lower wage cost in the developing countries. Moreover, buyers order international goods to extend ranges and provide variety for their customers.

Trade restrictions and the impact of the Multi-Fibre Agreement on imports have resulted in retailers having to source goods from several countries (Dawson, 1993). However, the implications of quotas and tariffs under GATT and the design of bilateral trade agreements have reduced barriers and encouraged increased product selection in fashion clothing outlets (NCC, 1991).

Fashion retailers have two choices. They can give their manufacturers clear specifications about fabric content, colour, design and garment quality and monitor production methods (UN, 1985), as is typical of own brand retailers, such as Marks & Spencer, which work closely with their suppliers to ensure garment quality. Some retailers choose to select from manufacturer's lines and have less control over production. Fashion retailers promoting national brands have no influence over the design, colour or fabric utilised in the manufacturing process.

3.6.2 Internationalisation of UK based retailers

There is an increasing trend for retailers to internationalise their operations in the pursuit of growth. The number of retailers within the European Community trading internationally increased from 35 in 1960 to 1,321 in 1992 (Tordjman, 1994). In 1992, the European Union sought a free market, which encouraged retailers to establish outlets outside their home territory, particularly if it was saturated or if a market segment had been identified as not being served by retailers in the host country (Alexander, 1995b; Muniz-Martinez, 1998). Moreover, some retailers decided to follow existing customers to the host country (Dawson, 1993). These retailers made the decision to target similar customer segments in different countries by globally using the same trading format employed in the home market (Salmon and Tordjman, 1989). For example, Laura Ashley, Benetton and Next employ this strategy. Treadgold (1990) notes that these companies are exceptional and that most retailers mould their format to suit the culture of the local market. Fashion retailers operating internationally perceive they have a differentiated product and a clear market positioning that will make them thrive (Alexander, 1997).

UK retailers employ four main methods to enter international markets. These are to acquire an existing company, via joint ventures, by franchising or by opening new units (Alexander, 1995b). The first option provides UK retailers with an existing business and distribution network whilst also providing 'organic growth'. Joint ventures and franchising offer the security of local knowledge and lower investment costs compared to launching outlets managed from the home country (Alexander, 1995b). Companies such as Marks & Spencer use a combination of all these methods depending on the differences in culture and legislation within the host country (Dawson, 1993). In contrast, Next has decided only to operate overseas using franchising as the preferred method of expansion (Clark, 1998).

3.6.3 Fashion retailers entering the UK

Multiple fashion retailers are increasing aware of competition from international companies establishing a presence in the UK as an attractivel growth area. "The world is witnessing a convergence of consumer tastes and aspirations particularly among the middle classes and the young" (Davies and Finney, 1998: 2). Until 1970 internationalisation was very limited with only a few companies such as C&A successfully expanding throughout Europe. During the 1980's a number of European and American fashion retailers successfully entered the UK market with global brands, such as Benetton and Stephanel. Expansion increased in the 1990's with companies such as Ouiset, Kookai, Morgan, Hennes, Naf Naf, The Gap and Levi entering the UK, and designer brands including Donna Karan, Ralf Lauren, Versace, Armani, Gucci and Diesel opening outlets in larger cities (Davies and Finney, 1998; Moore, 1998). The merchandise offered by these companies is largely fashion-led and targets younger customer groups with a strong sense of personal style (Moore, 1998). The motivation of these companies to enter the UK fashion clothing market is attributed to its lack of differentiation and the image possessed by an international brand, be it French, Italian or American (Moore, 1996).

3.7 Menswear Fashion Retailing in the UK

The total size of the menswear clothing market grew strongly in the late 1980's but the recession affected menswear clothing sales much more than womenswear and although consumer spending on womenswear decreased in real terms between 1990 and 1992, menswear fared far worse (Table 3.3). After the recession, sales of menswear increased (Table 3.1) and reached £6.6 bn. in 1997, an increase of 6.9 per cent on the previous year (MTI, 1998).

Table 3.3 Consumer expenditure on clothing, at current prices, 1988-93.

	1988 £m	1989 £m	1990 £m	1991 £m	1992 £m	1993 £m	% Change
Womenswear	8,700	9,500	9,800	9,979	9,993	10,270	+18.0
Menswear	4,370	4,770	4,945	4,785	4,558	4,698	+ 7.5

Source: Mintel (1993b)

HMSO (1991) identify four broad categories of menswear consumers: the traditional formal customer buying business suits, formal shirts and ties; the sophisticated customer purchasing stylish formal and casual wear; the fashion avid customer, who wants the latest look in casual clothing for an 'up-to-date' look; and the mainstream customer wanting clothes that are not fashionable but provide value for money. Only department stores or variety retailers can aim to cater for this wide spectrum of customers, from the very young and trendy to the more traditional shopper, because this type of store can create specific areas designed for each of these categories.

Multiple specialist fashion retailers are responsible for approximately a quarter of all menswear clothing sales. Their competition comes from five different sectors: variety retailers, department stores, independent fashion retailers, sportswear retailers, and the supermarkets (Table 3.2). In total, multiple fashion retailers have a greater share of menswear clothing sales (57 per cent) than independent retailers (17.5 per cent) (Mintel, 1997d). Moreover, most consumers shop at a number of different stores even if they have a preferred outlet (Appendix 1) (Verdict, 1994).

3.7.1 Multiple specialist menswear retailers

Many menswear fashion purchases are made from multiple specialist fashion retailers, which in the main sell own-brand merchandise. These stores traditionally provide a deep product range with a clear image, targeting clearly defined customer segments (Dawson and Broadbridge, 1988). Own-brand goods accounts for about 60 per cent of fashion sales in the UK (Broadbridge, 1996a).

The company with the largest share of the specialists menswear fashion market in 1993 was the Burton Group with the three fasciae of Burton Menswear, Top Man and Principles for Men with 7.6 per cent, 3.0 per cent and 1.0 per cent market share respectively (Verdict, 1994). After the demerger from Debenhams and the renaming of the group to Arcadia these fascia are managed as one operation rather than as separate companies to gain advantage from economies of scale (MTI, 1998). The Arcadia Group also operates the womenswear outlets of Dorothy Perkins, Top Shop, Principles for Women and Evans. Furthermore, the company purchased the fashion clothing chains of Wallis, Warehouse, Miss Selfridge, Richards and Outfit from Sears in 1999 and thus increased the market share of womenswear clothing to 12.2 per bringing it near Marks & Spencer, which is estimated to have 14.8 per cent share (Mills, 1999c; Rankine, 1999d).

By 1997, movements in the market meant that Burton Menswear had a reduced market share of 3.1 per cent and in 1998, the Arcadia Group was estimated to have about seven per cent of the menswear market (Corporate Intelligence, 1997d; Corporate Intelligence, 1998; MTI, 1998). Burton Menswear has over 360 outlets, Top Man approximately 200 and Principles for Men trades from about 175 sites. All three formats sell a combination of national brands and own label goods. Furthermore, all the different outlets in Arcadia offer merchandise via the Internet and mail order catalogue, the latter in co-operation with Littlewoods. New developments include the launch of a new fascia, Style Union, in which several of Arcadia's own-brands are on sale with manufacturers brands, and the acquisition of Wade Smith, a retailer of designer brands (MTI, 1998). Arcadia has integrated all the different operations and will now declare annual results based on the split between menswear (approximately 35 per cent of the company's turnover before the Sears purchase) and womenswear rather than on store formats.

The second largest retailer within this sector is Next for Men with a market share of 2.5 per cent in 1993 which increased to 4.6 per cent in 1997 (Corporate Intelligence, 1997d; Corporate Intelligence, 1998). Next for Men is part of Next Retail Ltd. which also sells women's and children's clothing. The retailer has consistently increased sales per square foot to £676 in 1998 compared to the Arcadia Group density of approximately £320 per square foot. This is still below the strongest return on space achieved by Jigsaw at nearly £1.000 per square foot (MTI, 1998; Potter, 1999). Next trades out of 331 stores and promotes own label goods (Osborne, 1999). It is estimated that Next for Men and Next Directory together have about five per cent of the menswear market (MTI, 1998). Next communicates with its customers not only by the design of the store environment and the product presentation, but also through the ticketing and point of sale material which emphasise the design features to promote the value of the brand (Moore and Shearer, 1998).

Moss Bros. has in recent years increased its share of the menswear market to three per cent, partly through the acquisition of Blazer from Storehouse. The group has 187 outlets trading under a number of fascia: Moss Bros., Savoy Tailors Guild, Cecil Gee, Blazer and The Suit

Company as well as three Hugo Boss stores and one YSL outlet (MTI, 1998). Moss Bros. has about 13.5 per cent of the suit market and aims to become the market leader in this area by the end of 1999 by outperforming Marks & Spencer, which currently has about 15 per cent (Phelps, 1999).

The privately owned company, River Island, has approximately 350 stores and promotes both womenswear and menswear from joint units. The company sells both own label and some national brands and has a two per cent share of the menswear market. River Island is continuing its repositioning strategy to promote goods that appeal to its existing customer segment as it ages (MTI, 1998). All the other multiple specialist retailers have less than three per cent of the menswear market (Table 3.4).

In recent years a number of smaller multiple specialist retailers, such as USC, Capolito Roma and Active Venture, have entered the menswear fashion sector promoting branded goods to the fashion aware younger male customer. Ciro Citterio, which promotes its own label merchandise, has been one of the fastest growing groups and trades under the formats of Oakland, Hornes and The Sweater Shop (MTI, 1998). However, the main competition to the multiple specialist menswear retailers comes from variety stores, such as Marks & Spencer and Bhs; department stores such as Debenhams; independent retailers selling national brands; and sportswear retailers.

Table 3.4 Market share for menswear retailers (1993)

Retail company	Market share of menswear - 1993	Market share of menswear - 1997
Marks & Spencer	16.9	15
Arcadia	N/A	7
Burton Menswear	7.6	*
Top Man	3.0	*
Principles for Men	1.0	*
Debenhams	4.4	4
C&A	4.2	4
Moss Bross	ϕ	3
Bhs	2.7	2
Next for Men	2.5	5
Fosters	2.2	ϕ
Littlewoods stores	2.0	ϕ
River Island	1.7	2
House of Fraser	1.6	ϕ
John Lewis	1.0	ϕ

Source: MTI (1998) and Verdict (1994)
Note: * indicates these companies are now quoted as Arcadia
ϕ indicates data was not available

3.7.2 Variety retailers and department stores

The variety store sector includes fashion clothing retailers such as Marks & Spencer, Bhs and Littlewoods. In 1993, Marks & Spencer, the largest menswear fashion retailer, had a market share of 16.9 per cent of the total menswear clothing market (Verdict, 1994). By 1997, this had been reduced to about 15 per cent (MTI, 1998) and continues to fall as competition among the major retailers intensifies (Anon, 1999). The competitor analysis carried out by Verdict (1994) indicates that Marks & Spencer is a strong competitor to all the multiple specialist retailers, but that these also individually compete with each other (Appendix 1). The area that Marks & Spencer has neglected is the increased demand for branded menswear clothing. In contrast they have developed casual ranges that have been very successful (MTI, 1998). This has been achieved by using designers, such as Paul Smith on a consultancy basis, to update and improve the styling of ranges (Moore and

Shearer, 1998). Marks & Spencer has particular strengths in men's outerwear with 35 per cent of the trouser market (Corporate Intelligence, 1997c); 25 per cent of suit sales (Corporate Intelligence, 1997a) and 16 per cent of the shirt market (Corporate Intelligence, 1997b).

Recently, Marks & Spencer has seen a 41 per cent reduction in pre-tax profit due to reduced consumer loyalty and negative publicity. Hence, management have announced that new designers, such as Timothy Everest, the Savile Row tailor, are advising the company on style and design and that stores will be selling basic classical ranges at improved prices (Alexander, 1999; Rankine, 1999a). An additional problem for the company has been the purchase of 19 Littlewood stores, which have not performed to plan, and it may take several years before Marks & Spencer again makes £1 billion pre-tax profit (Rankine, 1999a). In May 2000, Marks & Spencer announced a cut in the dividend due to poor trading over the last eighteen months. The company blames increased competition and polarisation in the UK clothing market "with better branded offers at one end of the market and discounters at the other" (Menary, 2000).

John Lewis Partnership is the largest department store group in the UK based on turnover, but Debenhams with 4.4 per cent market share of the menswear market is the largest department store in terms of fashion sales (MTI, 1998; Verdict, 1994). Debenhams sells a high proportion of own label goods from its 92 stores as well as the Arcadia labels and has recently strengthened its offer with a number of designer ranges.

House of Fraser has about 50 stores and has successfully tried to attract younger shoppers by promoting new brands such as Tommy Hilfiger, DKNY and Ralph Polo Jeans. It has also developed its own Linea label very successfully (MTI, 1998). The department stores traditionally promote a number of concessions to broaden their offer, but both House of Fraser and Debenhams are trying to strengthen their own brands to become less reliant on concession sales (MTI, 1998).

C&A, the privately owned retailer, has its head office in Düsseldorf as well has having a strong presence in Holland. The company has approximately 120 stores in the UK and 580 stores in Europe and is a network of autonomous national companies managed by the Brenninkmeyer family (MTI, 1998). In the UK the company has a market share of 4.2 per cent of the menswear market. Traditionally, C&A positioning has been between the discounters and the variety stores, but the company tried to reposition its brand during 1999 (MTI, 1998). However, in June 2000 the decision was announced to close all the UK and Irish stores during the next nine months. This is due to the increased competition from the discount retailers such as Peacocks, Matalan and New Look (Hope, 2000).

3.7.3 Independent menswear fashion retailers

One of the distinctive features of menswear fashion retailing, compared to the womenswear sector, is the low number of multiples trading in the market (MTI, 1998). This is partly to be expected since menswear sales are approximately half that of womenswear (Mintel, 1997d), however, menswear outerwear sales from multiple specialist retailers only account for 25.4 per cent compared to womenswear outerwear sales of 32.6 per cent and this has provided the opportunity for the independent sector to retain approximately 18 per cent of all fashion clothing and footwear sales (MTI, 1998). This percentage is gradually decreasing, but is still approximately six per cent more than for womenswear and nine per cent more than for childrenswear sales (Mintel, 1993b; Mintel, 1997d).

The independent retailers cannot compete on price, as they are unable to buy in bulk, and suffer from intense competition from department stores and multiple retailers on the high street. However, these retailers have the ability to offer a personal service to their customers and a more exclusive branded product. Consequently, they are gradually trading up and targeting consumers with a higher disposable income by providing a service tailored to their customer's needs (Anon, 1998a; Mintel, 1997d; MTI, 1998). Middle-aged men in the ABC1 socio-economic groups are the most likely customers of independent retailers. These are discerning customers seeking fashion clothing, which is different in styling and quality from the merchandise on offer at the multiple retailers (Mintel, 1993b).

3.7.4 Sportswear retailing

Sportswear retailers, with a market share of 9.9 per cent of the menswear market (MTI, 1998), are increasing their sales at the expense of high street fashion chains (Harverson, 1998). Menswear retailers traditionally sold formal and casual ranges, but have now increased product lines to promote a narrow selection of sportswear fashion goods (Mintel, 1997b) and this has provided the opportunity for sportswear retailers to promote fashionable sportswear ranges in much greater depth than the menswear retailers can provide (Harverson, 1998; Mintel, 1997c).

Comparative analysis of this sector is difficult since official statistics combine sports goods stores with those selling leather goods, toys and fancy goods. However, recently sportswear retailers have increased sales of fashionable sportswear clothing and hence JJB Sports is now listed as a clothing retailer (Mintel, 1997c). Nevertheless, MTI (1998) include sports shops and clubs as a separate sector within menswear clothing sales and list this to be nearly one tenth of all clothing sales with the specialist multiples being responsible for the turnover of just under a quarter of all menswear clothing.

The expansion of sportswear retailing is also due to increases in leisure time and a move by some people towards healthier lifestyles, which encourages people to take more exercise and, thus, the need for practical clothing suited to these pursuits. This type of sports clothing has become part of everyday wear (Easey, 1995; MTI, 1998). In total, sales of sports merchandise grew nine per cent during 1996 (Mintel, 1997c). Sports shops are where younger people seek sports related fashion brands, such as Reebok, Nike and Adidas (Mintel, 1997c) and these retailers target their displays towards the fashion orientated and brand aware youth shopper.

Sports Division, based in Scotland, became the largest UK sportswear retailer after purchasing Olympus at the end of 1995. The group had an estimated sales turnover of £350 million in 1997 with 260 outlets, including over 30 superstores, in the UK (Mintel, 1997c). In July 1998, JJB Sports merged with Sports Division to become the market leader with a 16 per cent market share and trading from 472 outlets (Osborne, 1998). JJB Sports was achieving better margins (17 per cent) than Sports Division (9.6 per cent) and it is envisaged that the merger will provide opportunities for efficiencies (Williamson, 1998).

A consumer survey found that product quality and durability are the most important factors to the majority of sportswear shoppers, with a third each seeking comfort or well-known brands. Low prices were only important to a fifth of respondents. Shoppers do not appear to be bargain hunters, in contrast to customers in other retail sectors, but realise they have to pay higher prices for fashionable premium brands or high performance products (Mintel, 1997c). The market for sportswear retailing appears to be slowing down and those retailers focusing less on fashion and more on leisure and sports activities may well be in the best market position (Murden, 1998; Steiner, 1998; Williamson, 1998).

3.7.5 Clothing sales from supermarket outlets

Traditional fashion outlets are meeting increasing competition from the supermarket retailers such as Asda with the George range, Sainsbury's Savacentre and Tesco's clothing section. Supermarkets have a 2.7 per cent market share of clothing sales with significant strengths in sales of childrenswear, hosiery and underwear (MTI, 1998). These retailers are able to undercut the high street retailers on price (Mills, 1998) and have been able to promote branded merchandise, such as Calvin Klein underwear, bought on the grey market at discount prices (MTI, 1998).

Multiple food retailers promote destination shopping aiming to provide customers with a one stop shopping experience. Longer shopping hours, easy parking, and convenient location have made it possible for food retailers to increase their market share in non-food ranges. Asda has announced its goal of achieving £1 bn. in sales from clothing, which is twice its current sales turnover (MTI, 1998). Consequently, the company has increased the space allocated to clothing and sales have increased as a direct result of the strength of the brand. Furthermore, both Tesco and Safeway have given greater prominence to cut-price designer clothes, increased ranges and improved methods of display (Bray, 1997).

3.8 Purchasing Trends for Menswear Fashion Clothing

> "Customers are becoming more affluent, sophisticated and selective. Growing importance is attached to protecting their identity and this is reflected in the clothes, eating habits and home"
>
> Musannif (1988: 3).

Consumer demand for fashion clothing is becoming increasingly fragmented (Firat and Shultz II, 1997) and the choice of store is based on the consumer perception of the retailer (Easey, 1995). This is created through a series of interactions typically generated on two levels: the customers purchase experience and the consumption of the product.

3.8.1 Customer purchase experience

Consumer expectations of the overall shopping experience have risen since the recession of the late 1980's with customers seeking bright and clean environments, well designed stores, stock displayed for ease of selection, good size ranges, frequently changing product lines providing 'value for money' and good customer care (O'Brien and Harris, 1991).

In 1997, the National Consumer Council identified consumer attitudes to be an important factor influencing purchasing behaviour. The main determinants were price, 'value for money', style and quality of merchandise. Other factors highlighted were convenience, assortment of goods, branding and the return policy. Consumers in Scotland followed the UK pattern of perceiving price and quality to be the two most important factors, but differed from the majority of the UK population in stating selection and choice of goods to be more important than fashion and style (MTI, 1998).

Research conducted on behalf of Marks & Spencer indicates that male shoppers prefer not to have to go through a ladieswear department before entering the menswear section. This has resulted in the company planning to restructure the layout of their stores and move menswear fashion departments to stand alone units or to a ground floor location (Trefgarne, 1998). Male consumers are less influenced by the style of the merchandise and convenience than women are. Younger shoppers are particularly price and fashion oriented and less concerned about quality, in contrast to the older age groups where price and quality appear to be the main factors (MTI, 1998).

Customer expectation of service level is increasing to the extent that retailers attempt to employ staff that mirror the targeted customer groups by reflecting their lifestyle and beliefs (Freathy and Sparks, 1996; Lowe, 1991). Overall, retailers have been successful in improving the shopping experience, which has mirrored the increase in customer expectation (Evans, 1997), but retailers have yet to resolve how they can consistently provide the service expected by customers.

3.8.2 Consumption of the product

The largest group of consumers, shopping for menswear fashion, are the 19 to 44 year olds, male or female, in the C1C2 socio-economic groups and consequently many of the high street fashion retailers concentrate their market positioning to attract these customers (Mintel, 1997d; Musannif, 1988). Patterns of employment are changing with the number of blue collar workers decreasing and white collar jobs in service industries, professional and semi-professional occupations increasing and reinforcing the fragmentation of the market (Mintel, 1997d).

Men traditionally have a working wardrobe, particularly if they are in the clerical, supervisory or management occupations and many companies now have a dress code even if this is only applied through peer pressure (MTI. 1998). From 1989 to 1997 suit sales declined by 25 per cent whilst the proportion of white collar to blue collar workers increased (Porter, 1997c). This is in part due to the recession, but also to the trend to a more casual working wardrobe (Easey, 1995; MTI, 1998). Several companies now encourage employees to dress down on Fridays, which in essence results in employees having two sets of clothing for work: formal wear for Monday to Thursday and smart casual for Friday (Novina, 1996; Porter, 1997c; Rasband, 1996; Saporito, 1993; Townsend, 1998).

Since the late 1970's, the media has become an important influence in fashion purchasing by advising readers on seasonal styles and garments with 'street cred' (Easey, 1995). This is also confirmed by the number of fashion magazines now available, such as Loaded, Esquire and GQ, and targeting male consumers (Mintel, 1997e). Many young male consumers are, as a result, more fashion conscious and wish to express their self-image by the clothing they wear. Buying the right brand provides a sense of status and self-enhancement (Jobber, 1995; Lewis and Hawskley, 1990). Men are influenced by advertising and contemporary store design and induced into buying more fashionable clothing (Verdict, 1994) although most still prefer to purchase established safe brands (Drew and Dallanegra, 1995; Foxe, 1998). Younger brand aware consumers want to wear the 'right' label as reference groups influence the fashion purchasing decision (Horn and Gurel, 1981; MTI, 1998; Willans, 1995).

Multiple specialist fashion retailers identify the customer groups they want to target and design or purchase ranges especially for them. These targeted groups are normally identified in terms of the male socio-economic profile and do not credit the female contribution towards the purchasing decision. In excess of thirty per cent of menswear clothing, such as underwear, socks, shirts and knitwear is purchased by women shopping for their partners (Mintel, 1997b). Higher risk purchases, such as formal suits, are often a family decision with the female partner strongly influencing the decision process (Shin and Dickerson, 1999). This was confirmed by the Access/BMRB's 'Men Shopping Badly' survey, which found that approximately three quarters of all menswear purchases were influenced by women (cited in MTI, 1998). This highlights a dichotomy between the younger fashion aware consumer, who looks to peer groups for confirmation of the 'right' brand, and the slightly older shopper, who may be less confident in choosing fashion clothing and thus require a female partner to give the final approval.

The retailer has to know the needs and wants of the male consumer. In the field of fashion, where products occupy a symbolic as well as a functional role (Elliott, 1994; Holman, 1981; McCracken and Roth, 1989), there is an even greater need to understand the process and content of consumer perceptions as a basis for more effective market segmentation (Du Gay, 1996). Consumers may need clothing to keep them warm, but they desire fashion items, which signify status, lifestyle and image and which provide an opportunity to project their personality and identity as individuals. Creating these needs is central to the concept of fashion marketing.

3.9 Conclusion

This chapter has explored retail trends over the last three decades and examined pertinent issues for multiple specialist fashion retailers including merchandise factors, customer service requirement, location and internationalisation. It has highlighted a number of choices available to fashion retailers in choosing their strategies to achieve company objectives and mission.

In this dynamic environment a critical success factor is the need for retailers to be able to respond quickly to changes in consumer expectations (Dawson, 1995). It is important to establish consumer attitudes to a brand or a store, to analyse market trends and thereby to establish the direction of the marketing. Furthermore, company success will depend on how well retailers analyse and understand information and how "through a series of creative acts and processes transmute that knowledge into unique and wantable goods, services and systems" (Sorrell, 1996: 4).

In addition, the chapter has examined some of the trends in fashion retailing in terms of market concentration, consolidation and internationalisation. The chapter contextualised these trends within UK menswear fashion sector and examined the main players within the menswear clothing market. This exploration found those fashion retailers lacking a strong brand and a differentiated product range to be vulnerable, as niche shifts and new entrants alter the dynamics of the market. The chapter concluded with an examination of trends in menswear fashion purchasing and highlighted the change in the working wardrobe, the role of the media and the influence of women as important contributors to the decision process of what and where to purchase menswear fashion clothing.

CHAPTER FOUR

METHODOLOGY

4.1 Introduction

In Chapter One different models of consumer behaviour were examined; in Chapter Two consumer perceptions of store image and methods of store image measurement were discussed and the way fashion retailers use marketing positioning strategies to compete on the high street were explored; and in Chapter Three an overview of past and current retail trends was presented. These chapters sought to illustrate how consumers and retailers interact in the marketplace.

The aims of the thesis are to evaluate consumer and retailer perception of store image and to identify marketing strategies that influence consumers in their choice of store in the context of menswear fashion purchases. To achieve these aims it is necessary to understand purchaser expectation and evaluation of menswear fashion retailers and the conditions on which they base their choice of store. It is also necessary to evaluate retail employee perception of their own company and to consider the manner in which competing firms operate. This chapter will therefore argue that the realist epistemology and ontology are most appropriate to the achievement of these aims and will describe the methodology for each of the four phases of research. Analysis of each research phase is presented in separate chapters from which a series of conclusions and recommendations are derived.

4.2 Philosophical Foundations

4.2.1 Positivist philosophy

Social science research methods were traditionally modelled on the natural science techniques of testing logical theories using rigorous quantifiable measurements and applying deductible analysis. The term 'sociology' was formulated by Comte meaning the scientific study of human society (von Wright, 1993). Positivist research, a description also developed from Comte's terminology 'positive philosophy' (Kolakowski, 1993) aims to follow the principles of natural scientific research by testing theories through experiments to probe whether the theory is correct or false.

Positivists believe that knowledge of the world is based on objectively defined truths which "exist externally to the individuals who make up humanity" (Jupp and Norris, 1993: 40). They argue that the social world follows a set of laws based on cause and effect and that scientific methodologies are the way to establish these causal relationships (Henwood and Pidgeon, 1993).

Holmans (1964) identifies theory developed by positivist methodology as a number of interrelated proposals from which clarification can be deduced. Denzin (1989b) points out that theory, to positivists, consists of proposals or hypotheses that combine descriptive and relational ideas and that when deductions have been made 'theory is explanation' and these allow for predictions.

Positivist researchers within the social sciences accept that research methods should be deductive. Hypotheses are deduced from theory and presented as a number of related variables which can be tested by measuring the observable (Kolakowski, 1993). This is why this process is also termed the hypothetico-deductive method (Popper, 1959, 1963). In this way the hypotheses and, as a consequence, the theory can be verified or declared false (Jankowicz, 1995). The generalisation of results means that theories can be tested and advances in knowledge made by improving those theories.

Deductive methods of thinking are based on facts or situations, which comply with rules and theories. First, a conceptual or theoretical structure is developed prior to empirical observation (Gill and Johnson, 1991). Researchers use logical deduction as a starting point to formulate theories or hypotheses before investigating whether the situation will fit the theory and draw conclusion from this. The theory links two or more concepts together in a causal chain and comprises untested statements about the relationships of these concepts. If the concepts are not observable they have to be operationalized to enable empirical testing (Gill and Johnson, 1991) (Figure 4.1). For example, if company strategy complies with an accepted theory or model when tested against observable, measurable indicators such as profit, labour turnover etc., it would indicate the company to be effective. However, a company with a strategy that did not fit the model would, therefore, be reasoned to be ineffective. If the company was successful on the measurable indicators, but the company strategy did not fit the established theory, then the theory would be rejected and the model would have to be adjusted. The causal analysis can be described as follows:

A causes B

or

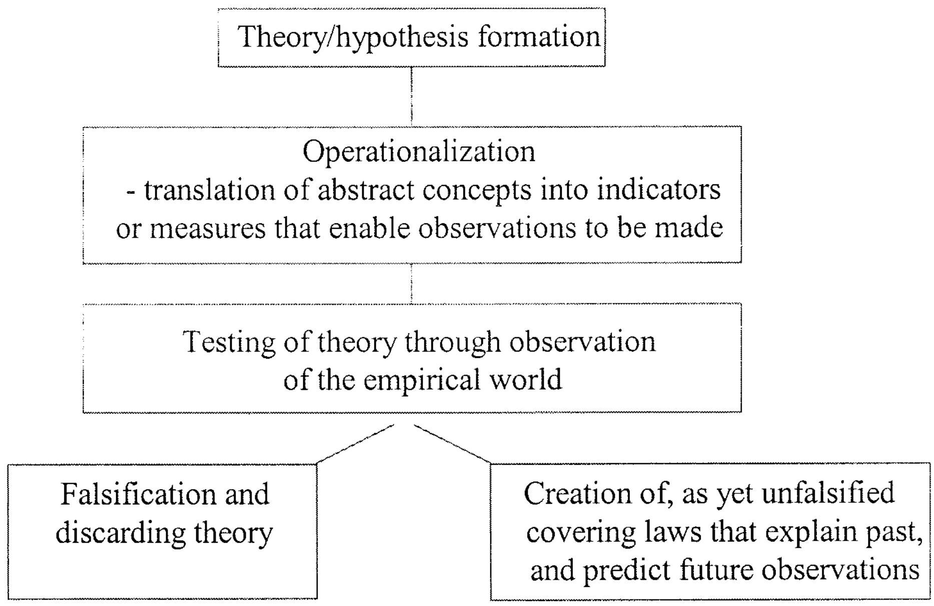
Variation in A causes variation in B

that is

Stimulus A causes response B

Positivist research seeks to make inferences about causal factors between two or more social phenomena (Jupp and Norris, 1993) and thus provide the answers to the question 'why' from data which are categorised and analysed to fit the concepts (Denzin, 1989a). The positivist methodology uses analytical language and data can be verified using empirical quantitative measurements on a directly observed phenomenon (Merton, 1967). It does not attempt to describe a phenomenon that cannot be analysed within this environment. The objectives of this method are to predict behaviour without including any subjective experiences (Smith, 1986). Using standardised procedures in administration to ensure that the study can be replicated to test reliability eliminates the subjective influence the researcher or observer could have on the data. Moreover, if interviewees make responses based on the same 'stimuli' then the information can be compared (Fielding and Fielding, 1986).

Figure 4.1 The process of deduction



Source: Gill and Johnson (1991)

The positivists argue that any research objective should be observable, quantifiable and measurable and that the social world that cannot be quantified, measured objectively or controlled scientifically should not be included in the analysis (Wittgenstein, 1922) and that respondent opinion about individual experience and meaning should be excluded from positivists studies (Denzin, 1989a). Anti-positivists criticise the dismissal of qualitative data from analysis and the positivists aim of generalisation (Gill and Johnson, 1991).

Positivist methods of research have the advantage of applying proven methods from the natural sciences and presenting the results clearly and concisely. A major criticism is that the social scientist cannot remain completely objective, as the phenomena investigated involves dealing with human beings, and if the researcher optimises objectivity, valuable data would be excluded from analysis. In contrast, the natural scientist may conduct experiments with inanimate objects to test out theories and thus be able to eliminate subjectivity.

Positivist reasoning supports the process of theory or hypothesis formation and focuses on the method of empirical testing of the theory and the knowledge which explains the causal relationships between concepts (Keat and Urry, 1982). But critics of positivism and deductive techniques reject the causal model as inappropriate in the social sciences and would argue that situations involving people are never simple. Interactions take place and what may appear to be a cause may in itself be an effect of a more basic cause (Laing, 1967). Furthermore, Burrell and Morgan (1979) state that science is based on fundamental value-free assumptions, which cannot generate objective knowledge when trying to understand how people interact. This is because there are essential differences between studying inanimate objects using experimental designs and studying social behaviour. In particular, critics of positivism accuse deductive research for imposing an "external logic upon phenomena that have their own internal logics" (Gill and Johnson, 1991: 8) and thus natural science approaches are useful for studying subjects that cannot communicate their own behaviour, but are irrelevant in the study of human behaviour. Positivist approaches do not take into account that individual actions are influenced by the interpretation of circumstances, beliefs, attitudes and motives (Laing, 1967).

The deductive methods of the positivists have also been criticised by Glaser and Strauss (1967), who suggest that explanations of social phenomena are meaningless unless they are based on observation and experience, and that theory should not be formulated *a priori,* but as a result of the inductive analysis of empirical research and hence be more likely to be credible. Social science deals with human beings who interpret events in a given situation influenced by their motivation, attitude, intentions and behaviour all of which are of a subjective nature. The researcher becomes part of the situation and bases interviews and interpretation on previous experiences, which in themselves are subjective (Sayer, 1992). The inductivists reject the stimulus theory of deduction and advocate the use of respondent subjectivity as a way of interpreting reality. Theory formulation, in the view of the hermeneutic, should therefore be *a posteriori* (Fielding and Fielding, 1986).

If research into consumer and retailer perceptions of store image had to be conducted using positivist methods, it would entail developing a theory concerning attributes contributing towards store choice. This theory could then be tested with shoppers and proved to be true or false. If the theory was proved it could be used to predict future purchasing behaviour and if it was proved false, the theory would be rejected. The positivist philosophy of hypothesis testing is rejected since it would not facilitate the development of in depth knowledge or understanding of how consumers decide their choice of store; neither would it enhance comprehension of how retailers successfully build and maintain a strong market positioning in the minds of their customers.

4.2.2 Humanist philosophy

The post-positivists, interpretavists or humanists disagree with the positivist methodology of "objectivity; hypothetical-deductive theory; external lawlike relations; exact and formal language; and the separation of facts and meaning" (Lincoln and Guba, 1985: 29). They argue that there are fundamental differences between the natural and social sciences and that therefore different methods are required to explain and understand social phenomena (Benton, 1977).

The anti-positivist philosophy of science came to the fore at the end of the nineteenth century. Advocates of this style, Droysen, Dilthey, Simmel and Weber were critical of research methods taken from the natural sciences with its aim of generalisation about phenomena which could be replicated and predicted. In contrast, they perceived that investigation should have the aim of studying the individual and the uniqueness of a situation. Furthermore, Droysen and Dilthey criticised the positivist way of 'deduction and explanation' but encouraged 'erklären and verstehen' translated as 'meaning and understanding'. They suggested that researchers should understand the phenomena by putting themselves mentally into the situation being investigated using empathy (von Wright, 1993). This is in complete contrast to the positivist view where the researcher should be able to prove objectivity.

This humanist or phenomenological model is based on the search for understanding by interpreting the phenomenon rather than explaining it (Easterby-Smith *et al.,* 1991). The paradigm views the world as being socially constructed and thus has to be interpreted by people who are participating in the situation and consequently cannot be objective (Husserl, 1931). Research undertaken by post-positivist methods views the interactive meaning of language, behaviours, attitudes and feeling as important mainstays (Denzin, 1989b). The paradigm uses qualitative data collection methods to describe the reality as seen by respondents, to interpret it in the holistic sense within its context and to analyse the data generated with an aim to develop concepts (Henwood and Pidgeon, 1993). The model suggests that researchers should gain an appreciation of the historical perspectives of people; that they could use a 'narrative' presentation of the situation under scrutiny; and base the work on 'real' people and 'real' situations (Denzin, 1989b; Habermas, 1974). As such the researcher focuses on subjective accounts which are generated by the interactions of people within the world in which they operate (Burrell and Morgan, 1979; Lee, 1972).

To ensure effective induction Clover and Balsley (1979) recommend that researchers comply with a number of criteria:

- Observations must be thorough and documented accurately;
- Observations must be a true reflection of the population investigated;
- Observations must include sufficient sample numbers;
- Conclusions must be limited to declarations verified by the results and must not be too universal or comprehensive.

In conclusion, Bechhofer (1974: 73) claims that the research process is not a clear-cut sequence of procedures following a neat pattern but "a messy interaction between the conceptual and empirical world, deduction and induction occurring at the same time".

The humanist or hermeneutic philosophy of research has many advantages as it provides insight and understanding of the phenomena being investigated. The main criticism concerns the danger of subjective interpretation by both respondents and researchers, which may lead to distortion in the presentation of results. Positivists criticise humanists because of the lack of structure in research techniques and propose that this leads to unreliable results because this type of research is not easily replicated (Giddens, 1976). In this study of store image perceptions and development of store image by retailers, the advantages of the interpretavist philosophy is utilised to gain a deeper understanding of both the consumer and retailer perspectives of store choice and marketing strategies.

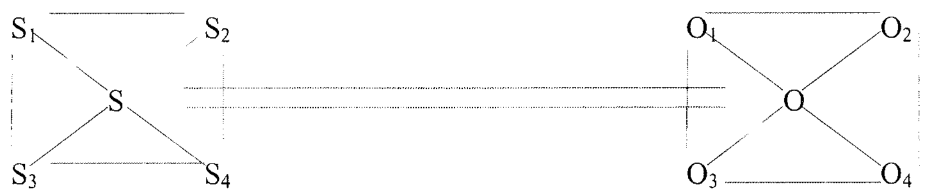
4.2.3 Realist philosophy

In the 1980's, understanding of realist philosophy began to be adopted by social science researchers. In research dealing with people, the task of understanding relationships between objects, events and causes, is multi-dimensional and therefore complex. "The task of assessing the nature of each of the constituent processes without being able to isolate them experimentally throws a huge burden onto abstraction - the activity of identifying particular constituents and their effects" (Sayer, 1992: 3).

The realists argue that the world is independent of our comprehension of it and that this knowledge is flawed and 'theory-laden'. Furthermore, the world consists of events and objects, including structures capable of creating events, which may not always be realised (Sayer, 1992). Sayer (1992) illustrates the realist perspective by demonstrating the relationship between the researcher and the phenomena being researched, by explaining that the social world is subdivided into a number of social groups each with their specific social relationships. For example a researcher, subject S, observes, records and interprets information about the phenomena, object O, which exists in another social group. Each social group have their own specific internal structures. Knowledge and practice is developed from S's investigation of O, but in order to do that there has to be a meaning attributed to the ideas, beliefs, concepts and knowledge held by both social groups (Figure 4.2) (Sayer, 1992). The meaning that the structure, practices, roles and responsibilities have to O and the social group, of which O is part, is concept-dependent (Winch, 1958). At the same time, the understanding and interpretation that O has of the phenomena is not necessarily the same as the interpretation given to them by S. Both S and O have a personal perception of reality. Moreover, S must understand the concepts within the environment in which they occur. They are 'context-dependent' (Sayer, 1992).

Not only social groups but also inanimate objects are associated with symbolic (concept-dependent) meaning. This occurs with fashion products, where wearing a particular brand can confirm the wearer's self-image. This, according to Sayer (1992), means that although material goods are without meaning in themselves, society interprets and translates the communication of these to have symbolic meaning to both the wearer and the observer. In effect there is a reciprocal relationship between S and O, which infers a 'concept-dependence of social phenomena', the interpretation of which is generally labelled hermeneutics.

Figure 4.2 Subject and object



where

$S_1, S_2, ...S_n$ represent knowing subjects within a social group S

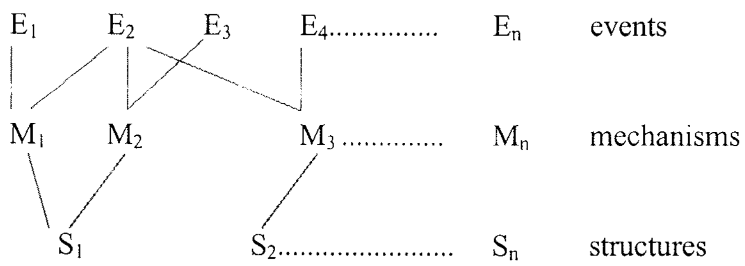
$O_1, O_2, ... O_n$, are social objects within a social group O

.... represent social relations within and between groups

Source: Adapted from Sayer (1992)

The realists argue that there is a causal relationship between the structure of the object, the mechanism (other objects with causal powers and liabilities) and the resulting effects or events. A mechanism is defined as the tendency to produce a change in an object or the causal event. For example little is known about the mechanism involved in the connection between a person's intention to buy fashion clothing and the actual action of doing so. In contrast, much more is known about synthetic fabrics such as Goretex and how the scientific process or mechanism works. When a mechanism intervenes, a number of different outcomes may result depending on the conditions in which they operate (Figure 4.3). Similarly, the same type of events may be due to different causes. Realist researchers investigate objects in terms of their structures and these are interpreted as more than just social compositions, the causal relationships between the intervening mechanisms and the effects or events (Sayer, 1992).

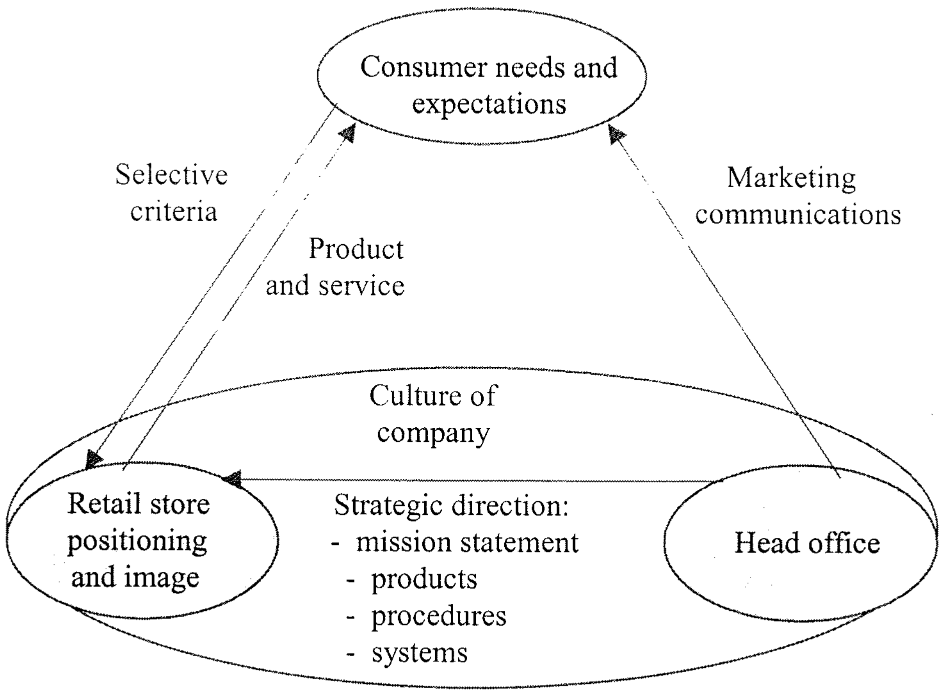
Figure 4.3 Structures, mechanisms and events



Source: Adapted from Sayer (1992)

This means that the researcher must first identify the causal mechanisms, by way of abstractions to improve understanding of the processes, along with obtaining qualitative data on the nature of the objects to discover patterns of behaviour or causal relationships (Sayer, 1992). An example of structures and the causal relationships within the retailing environment is presented in Figure 4.4 .

Figure 4.4 Simplified realist structure



A causal mechanism can become dynamic if relevant operative conditions exists (Freathy, 1992). For example the human relations policy of a company can be affected due to either employment regulations or the financial state of the company. An application of causal explanations relevant to this research topic is presented in Table 4.1.

Social theorists refute the positivist attitude of explanation and prediction and describe social interactions as having certain distinguishing features: a dialogue of the postmodern world; a text containing fragments of conversation, which should develop a depiction in the mind of the researcher and reader; an experience in which the observer cannot be objective but is part of the interaction; and that all societies are forever fragmentary and developing (Bruner, 1986; Tyler, 1986).

Table 4.1 An application of causal explanation of store positioning

Retail Sector	**Mechanisms**	**Conditions**	**Events**
Fashion retailing	*Marketing strategy*	• Branding • Growth of lifestyle marketing	Strong store positioning
	Human resource policy	• Ratio of full time to part time employees • Customer service requirements	High employee turnover
	Distribution	• Investment in technology	High productivity

Source: Adapted from Freathy (1992)

Realists attempt to understand the world in which we live by interpreting the 'how'. The research methodology employs responses and statements from individuals in an attempt to interpret these and to explain and understand their experiences (Denzin, 1989a). The realist philosophy is accepted in this thesis as the fundamental principle for investigating how consumers formulate store image, how they use store image attributes in store choice and how retailers marketing strategies are utilised to develop and maintain a market positioning which attracts the targeted consumer.

4.2.4 Post-modernist philosophy

Postmodernism has attracted extensive discussion in recent years. It is particularly evident in areas of the arts: architecture, music, fashion, film, literature and visual arts (Brown, 1995b). "Postmodernism brings the modernist hegemony to closure. It examines the ends, goals, hopes of modernist activity, situating it in its context of premodernist frameworks" (Silverman, 1990: 1). By this Silverman refers to the way postmodernists examine the philosophy and tenets of modernism. They extend the boundaries of modernism and examine the world by experiencing life from a subjective standpoint. Furthermore, as a reaction to the positivist philosophers, such as Comte, postmodern philosophy "enframes, circumscribes and delimits modernist thinking" (Silverman, 1990: 5). It encapsulates the subject-object interaction of human activity and experience and is the "critical questioning of the modernist dream" (Silverman, 1992: 140). "Epistemic suspicion is at the core of postmodernism" (Seidman, 1992: 68). Postmodernism is fragmented, discontinuous, multiple and dispersed, in contrast to modernism which is focused and continuous (Silverman, 1990). The modern era has come to an end and postmodernism is the reaction to it. Faurschou (1990) points out that postmodernism in the fashion world recycles objects previously given cultural value and reintroduces them in a stylised form. Fashion garments reinterpret history to provide a new message for the wearer. Brown (1995b) suggests that postmodernism is constructed from diverse often contradictory elements and that in reality it is an 'umbrella term' for a number of pluralist beliefs that combine elements in reaction to modernism. Gergen (1992) endorses this view by suggesting that objectivity is not desirable as rational methodologies conceal many alternative opinions.

Postmodernism shares many of the post-positivist characteristics, yet differentiates from each specific philosophy in that it "rejects the notion that individuals have unmediated access to external reality, but it also questions the very existence of the free thinking subject" (Brown, 1995b: 172). In this sense interpretation of human knowledge becomes unreliable and fragmented and Seidman (1992) argues that local postmodern narratives cannot be generalised, but are centred in the society on which they are based. This means that it is not possible to generalise or develop theories from empirical research and that any kind of research framework or methodology is problematic (Brown, 1995b). A postmodern research methodology is rejected in this thesis for these reasons and the realist view, that it is possible to investigate and develop "structures, practices and discourses of a society, and how they are constituted and interact" (Best and Kellner, 1991: 260) is accepted.

4.3 Research Techniques

Quantitative and qualitative research techniques both result in analysing data to make sense of the phenomenon. Researchers justify the methodology used based on "their suitability in answering particular research questions" (Bryman, 1988: 109).

4.3.1 Quantitative research methods

When a researcher uses quantitative methods to gather data it is quite separate from the analysis stage (Easterby-Smith *et al.*, 1991), although the planned analysis will affect the way the instrument is designed and data collected. The method used most frequently to generate data is the survey instrument which utilises interviews or structured questionnaires (Bennett, 1991). The design of the questions for the quantitative interview or questionnaire is very important as is selecting a representative sample. When surveys are administered all interviews or questionnaires should be conducted in a consistent way with each respondent.

Quantitative techniques are effective for consumer surveys, to measure attitude or preferences and are useful for generalisation of data from large samples. Moreover, they enable testing of reliability and validity (Easterby-Smith *et al.,* 1991). Examination of quantitative or macro analytical methods indicates that they are easier to analyse than qualitative techniques due to the nature of the responses. Surveys are cheaper and quicker to conduct than many other research techniques but they often lack depth of information (Bennett, 1991). Views and opinions cannot always be understood by using quantitative methods of analysis as much richness of experience, presentation and interpretation is lost. The post-positivist or humanists argue that generalisations from a survey administered to a sample of respondents neglect the differences of opinions between respondents due to the constraints of the instrument and the method of analysis (Cicourel, 1981). Hence, quantitative methods are only used as an indicator of general tendencies in this study, where it is judged to be appropriate and where they can contribute towards achievement of the research objectives.

4.3.2 Qualitative research methods

The emphasis in qualitative or micro analytical studies is on generating data from which the researcher can obtain insight and understanding by exploring the information in depth (Crouch and Housden, 1996). In qualitative studies, the researcher, seeking to investigate the 'natural' environment in which people live and work, becomes part of the environment and consequently cannot be completely objective or neutral. The methodological approach is also more open to eclecticism (Fielding and Fielding, 1986). Hammersley and Atkinson (1983) conclude that the most important issue of social research is faithfulness to the phenomena being researched rather than to any particular set of procedural principles, however strongly these are sustained by philosophical arguments. They point out that the difference between the social world and the natural world is that behaviour is based on motives, beliefs, attitudes and intentions and cannot therefore be understood in terms of causal relationships. The humanists perceive social environments as complex and hence they should not be oversimplified by using generalisations but be interpreted by highlighting the 'meaning' of personal experiences (Hammersley and Atkinson, 1983).

One of the advantages of using qualitative methods in the research design is that only a small but specifically selected number of respondents are required and information gained may highlight important views or opinions which may not be in the public domain. Qualitative research has three purposes:

- To discover significant variables in a field situation;
- To formulate a foundation for systematic testing of hypotheses;

- To discover relationships among variables.

Kerlinger (1976)

There are two main weaknesses when generating qualitative data: the inclination to choose information that fits neatly with preconceived ideas; and a disposition towards gathering conspicuous data because of its effect and omit more ordinary information which could possibly be of a more significant nature (Fielding and Fielding, 1986). The main disadvantage of qualitative research is that interviews take much longer to conduct and the results cannot be generalised (Crouch and Housden, 1996). Positivists would also question the reliability and validity of the findings and would argue that qualitative interviewing, using an unstructured design, means that researchers cannot know the relationship between the response and the cause unless this is particularly addressed by the interviewer. Thus the hypothesis cannot be tested and analysis can only be speculative (Fielding and Fielding, 1986).

The philosophical positions discussed so far have examined the polarised viewpoints of some researchers. However many research methods fall somewhere in-between these two camps (Easterby-Smith *et al.*, 1991; Gill and Johnson, 1991). In effect, one could view these philosophies as being at either end of a continuum with many researchers using methods somewhere in-between or even advocating the combination of a number of methods (Fielding and Fielding, 1986). Whilst composite research methods can be utilised, research philosophies cannot be combined. In summary, these positions can be compared in terms of their emphasis on deduction or induction, the degree of structure, the way data is generated and the method of interpretation (Table 4.2).

Table 4.2 A comparison of positivist and realist research methods

Positivist research methods	Realist research methods
• Deduction - theory *a priori*	• Induction - theory *a posteriori*
• Explanation via analysis of causal relationships	• Explanation of subjective meaning systems and explanation by understanding
• Generation and use of quantitative data	• Generation and use of quantitative indicative and qualitative interpretative data
• Use of various controls, physical or statistical, so as to allow the testing of hypotheses	• Commitment to research in everyday settings, to allow access to, and minimise reactivity among the subjects of research
• Highly structured research methodology to ensure study can be replicated	• Minimum structure to ensure generation of relevant and sufficient data
• Results are generalised	• Results are specific for the situation
• Researcher is objective	• Researcher is involved and subjective

Source: Adapted from Gill and Johnson (1991)

4.3.3 Triangulation of methodologies

Hammersley and Atkinson (1983), Kane (1985) and Denzin (1989b) are advocates of triangulation or combination of methodologies during the investigation of a situation or phenomena. Moreover, Gill and Johnson (1991) and Sayer (1992) consider that there is no single best method, but that researchers must select the most effective approach to solve each problem taking into account the nature of the situation, the expected outcome and the availability of resources.

"Data-source triangulation involves the comparison of data relating to the same phenomenon, but deriving from different phases of the fieldwork, or ... the accounts of different participants (including the ethnographer's) involved in the setting" (Hammersley and Atkinson, 1983: 198). Furthermore, multiple data sources avoid the risks that stem from dependence on a single type of data. Triangulation, in which data of different kinds can be compared increases validity of the analysis (Hammersley and Atkinson, 1983). Using more than one methodology is also recommended by Fielding and Fielding (1986) who suggest that methods could be combined with the intention of adding depth to analyses, but not with the objective of obtaining unprejudiced facts. Realist researchers advocate the use of triangulation, which can include the use of different sources of data, researchers and methodologies (Sayer, 1992), but the most popular is the across-method triangulation. By this Denzin (1989b) means combining two or more research techniques to study the situation. Confidence is increased in the analysis if data from different sources uphold the same inference (Fielding and Fielding, 1986) although the results of each method should not be expected to be exactly the same, as each uses a different perspective to investigate the same phenomenon (Lincoln and Guba, 1985). The importance of triangulation is the breadth and depth of information gained by merging different sources of data (Trend, 1978).

Many researchers use a multiple-strategy approach to generate qualitative data, to refute the critique of the work being subjective or biased, but triangulation in itself does not guarantee validity or reliability, which is still based on the quality controls that the researcher designs into the study. However, triangulation can help the researcher in testing the collected data and identify its strengths and weaknesses. Using a number of methods will, in the end, support the researchers opinion that the tenet of the findings will hold up to close scrutiny. Gill and Johnson (1991) point out that none of the main approaches to management research is without its shortcomings and recommend that the best way to overcome the disadvantages, weaknesses and limitations of each method is to combine these within the research study. This research evaluates the attitudes and opinions of consumers and retail employees and consequently a combination of qualitative and quantitative methods have been used to interpret the phenomenon and to strengthen the analysis.

Zelditch (1962) and Denzin (1989b) recommend that researchers should consider the relevance of different methods in the overall achievement of the research objectives. For example, how adequate data can be generated, which are sufficient, satisfactory and collected within the cost and time constraint. Although many researchers use triangulation within either a positivist or humanist research philosophy this study combines qualitative and quantitative methodologies using a realist philosophy. "Qualitative work can assist quantitative work in providing a theoretical framework, validating survey data, interpreting statistical relationships and deciphering puzzling responses, selecting survey items to construct indices and offering case study illustrations" (Fielding and Fielding, 1986: 27). For example, exploratory qualitative methods have been seen to ensure that quantitative measures are relevant in the research context (Silverman, 1985) and Reicher and Emler (1986) used a quantitative survey instrument to establish relevant interview groups for the subsequent qualitative stage. Jones (1988) agrees that the two approaches are complementary rather than exclusive. Due to the level of generalisation in macro research, the results become indicative or suggestive and, thus, there is a need for a more detailed investigation. This is where the strength of micro research becomes complementary and can enrich these inquiries. As such, the combination of the two provides a profoundness of analysis not available if either a positivist or a humanist methodology is pursued.

Collecting survey data, based on attitude questionnaires, would suggest that findings describe behaviour, which can be predicted from analysis of a number of variables. In opposition to this positivist view, the humanists propose that data about individuals will not predict social behaviour although they do agree that generalisations from quantitative analysis can enable the qualitative researcher to base in depth investigation on identified categories (Fielding and Fielding, 1986). Fielding and Fielding (1986) reason that both quantitative and qualitative data should be analysed using interpretative methods in order to evaluate the information. This means that interpretative sociology has helped to evolve the methodology of social science by declaring that people within their environment have to be recognised as a dynamic system which needs 'meaningful' explanation.

Needham (1981) points out that dividing data into its constituent parts does not provide increased knowledge about the social world, but that the results of synthesis are 'highly semantic and contextual particulars', which only become meaningful when evaluated from a holistic perspective. In addition, Evered and Louis (1991) advocate alternating between positivist and humanist methods of research as they feel that using only one method would hamper the capacity of comprehending the breadth, depth and fullness of the way of life within companies. They suggest that the two methods could be synergistically linked to overcome the deficiencies of each.

4.4 Research Design

4.4.1 Research context

The survey research was undertaken on fashion clothing purchasing since a gap had been identified in previous studies. In particular, there was a need for sector-specific image work; a requirement for customers to determine attributes important to store image rather than using pre-defined categories; and a need to evaluate the relative strength and importance of attributes of store image.

The research was mainly conducted in Glasgow, a city that has an approximate population of 800,000 and a catchment population of 1.5 million. Sixty per cent of all of Scotland's population live in the Central Belt between Lothian and Strathclyde (Fernie and Woolven, 1995). Glasgow is the largest city in Scotland, is one of the key destinations for fashion clothing purchasing and is second only to London in a UK context (Davidson, 1998; Porter, 1997a; Seenan, 1998). It has approximately 650,000 sq.m. of selling space and about 20,000 people are employed within the retail sector (Hyams, 1996). Furthermore, it has a national reputation for fashion retailing with the presence of a wide variety of locally owned stores as well as national and international chain stores (Rawlinson, 1995).

Many city centres are now being redeveloped due to restrictions in planning policies on edge-of-town developments (Dawson, 1995). Scotland has yet to see any of the large out-of-town shopping centres comparable with the Metro Centre in Gateshead, Meadow Hall in Sheffield, or Lakeside in Thurrock, but edge-of-town developments such as the Gyle centre in Edinburgh have been very successful. The confidence in the area for developing new retail centres is illustrated by the investment made in two new shopping centres: Buchanan Galleries, which opened in 1998, and Braehead, just west of Glasgow, which commenced trading in 1999 (Kinswell, 1997). The area is populated by a high proportion of affluent consumers with a disposable income greater than those living south of the border (Fernie and Woolven, 1995).

4.4.2 Research objectives

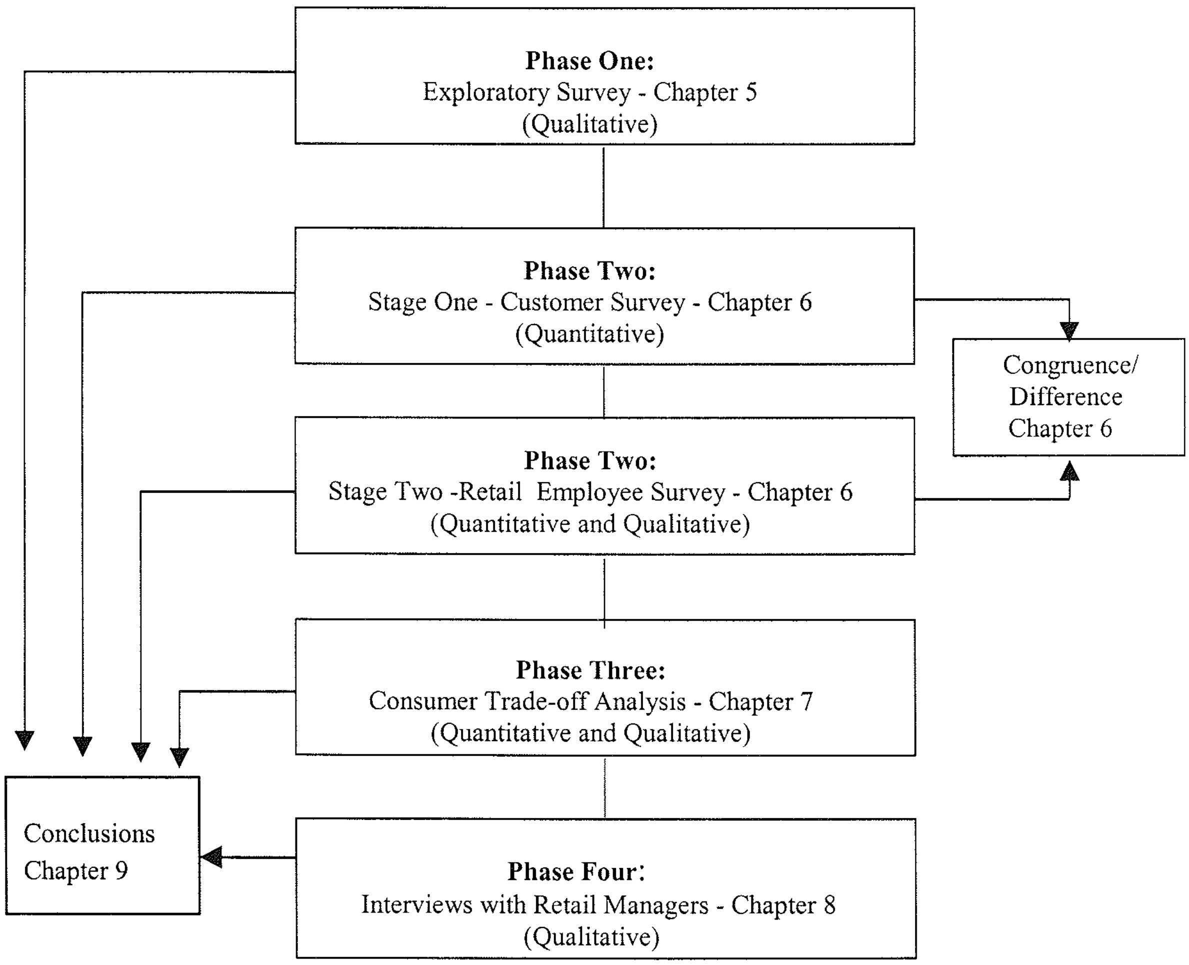
The general aim of the research was to identify how retailers implement marketing strategies to influence consumers in their choice of store. In order to achieve the specific objectives of the thesis the purposes of the primary research were:

- to identify attributes or characteristics important to consumers in their choice of store when purchasing menswear fashion clothing (phase one);
- to analyse store image perceptions of consumers and retail employees for selected menswear fashion stores (phase two);
- to evaluate the importance of factors contributing to store choice (phase one and two);

- to explore retail strategies for market positioning (phase three);
- to develop a framework for successful store positioning (phase four).

A methodological framework, within a realist philosophy, comprising four different phases, was designed to achieve the objectives (Figure 4.5). The following section will describe the methodology for each of the four phases.

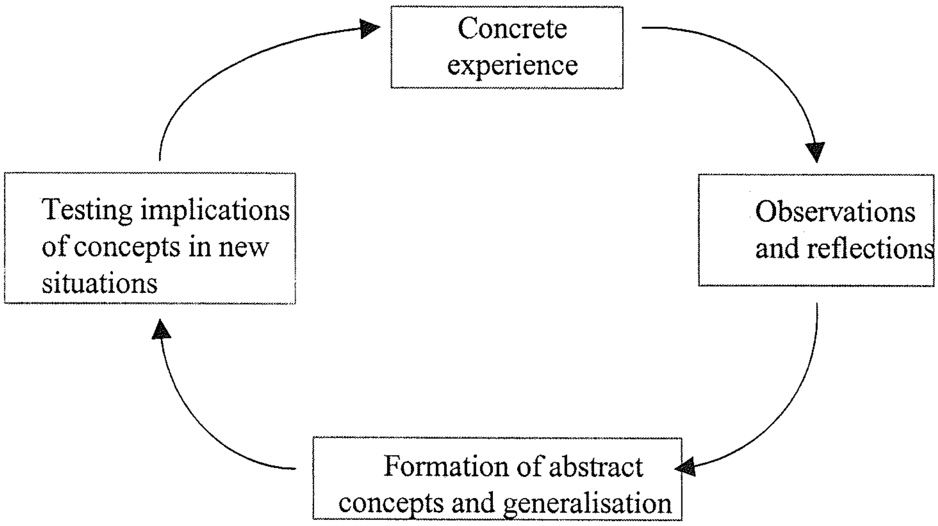
Figure 4.5 Research framework



4.5 Design of the Methodological Framework

The objective for conducting research is that it should improve our knowledge. This is attained through learning. Kolb (1983) examined the way people learn and hence evolved the model titled the experiential learning cycle (Figure 4.6). According to Kolb, working clockwise around the model, learning might commence with a concrete experience which, when the individual reflects on it, can be used to explain the situation. From this the individual may develop an idea of how to handle the event next time. These abstract conceptualisations can then be tested in a new situation leading to a new experience. For the purpose here the model can also be applied to reflect the way we learn from research using either deductive or inductive methods or a combination of both.

Figure 4.6 Kolb's experiential learning cycle



Source: Kolb *et al.* (1979)

The stages of deductive research correspond with Kolb's stages of 'Abstract conceptualisation' and 'Testing implications of concepts' and induction conform with the other stages of 'Concrete experience' and 'Reflecting upon that experience' (Gill and

Johnson, 1991). Inductive methods are used to explore consumer reasons for store choice and, having formulated the factors, they are validated using deductive methods to determine their reliability. From this reflection new theory can be developed.

The design for this research is in part determined by methodologies of previous studies which have identified image attributes that are important for one type of retailer, are not necessarily as important for another sector (Hansen and Deutscher, 1977). Previous studies have used semantic differential scales to identify the importance of image attributes (Hansen and Deutscher, 1977; James *et al.,* 1976; Malhotra, 1983; Schiffman *et al.,* 1977; Swinyard, 1977) and have, in the main, been decided by the researcher. This facilitates ease of completion, but constrains respondents to rate a store on a set of image attributes, which he or she may not have thought of themselves. Thus, the survey may include unimportant factors, and important store image dimensions, from the respondent perspective, may be left out (Zimmer and Golden, 1988). It is therefore meaningful for the research to commence with an exploratory phase to identify a set of attribute dimensions which a sample of consumers specify as being important when purchasing menswear fashion clothing.

The second phase utilises the results from the first phase. The identified attribute dimensions are validated as being salient variables in the choice decision. Furthermore, the store image of a number of retailers will be evaluated in terms of these variables. A theory for store choice can be developed and tested during this phase. In the third phase, a conjoint analysis will further augment the understanding of how consumers make their purchase decision based on store positioning.

Zelditch (1962) suggests that the most efficient way to get information about any company's policies and strategies is to interview key informants. Hence management research is frequently carried out using inductive methods (Bennett, 1991). As a consequence, the final phase will interpret data, generated from key informant interviews, with the objective of identifying the strategies retailers use to manipulate the image perceptions of their stores. A number of cases will be examined and proposals suggested for the maintenance and strengthening of store image.

This methodology requires an integration of quantitative and qualitative data by virtue of the different levels and sources of the data. Duster (1981) used a research design that interrelated different levels of investigation with methodologies appropriate for each level. This methodological design combined macro- and micro-analysis as data were generated from shop floor to senior management levels. The model formulated by Sayer (1992) and described previously (See section 2.2.1), will be applied to this study to identify those conditions that are within retailer control in the achievement of retail positioning (Table 4.3).

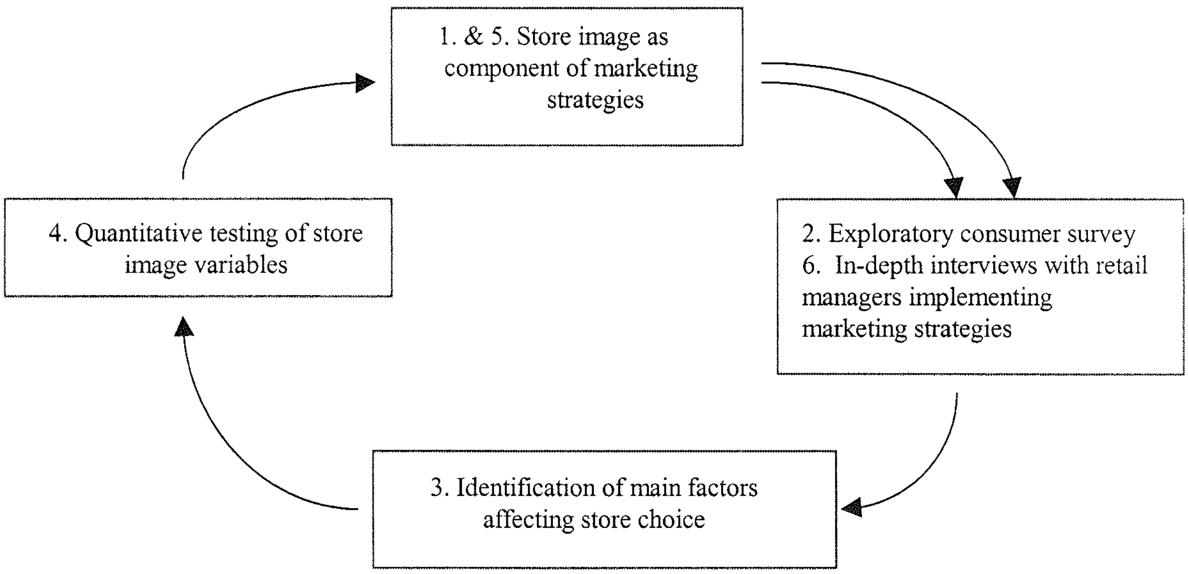
Table 4.3 Framework for identifying conditions within retailer control

Retail sector	Mechanisms	Conditions within retailer control	Events
Menswear fashion retailing	Marketing strategies	1. (To be identified in this study)	• Consumers to increase time spent in store
		2. as above	• Increase in customer loyalty
		3. as above	• Increase in transaction value
		...	• Increase in sales turnover
		n. as above	• Increase in profitability

Source: Adapted from Freathy (1992)

Survey research does not necessarily need to be founded in positivist research methodology, but can rely more on a combination of deductive and inductive methods by the way the survey is constructed, administered and interpreted (Bryman, 1988; Glaser and Strauss, 1967). For example, the first survey is exploratory and of a qualitative nature using open ended questions which are analysed using content analysis, a quantitative method of analysis (Holsti, 1969). Theory is developed inductively from the exploratory phase and tested in the second phase using a structured questionnaire. In the third phase, deductive and inductive methods are combined to obtain in-depth information about consumer purchase and store choice decisions. The full research design concludes with a purely inductive stage in which key informants are interviewed using an unstructured format and utilises the whole of Kolb's experiential learning cycle to emphasise and confirm understanding of the principles involved in store image strategies (Figure 4.7).

Figure 4.7 Research phases based on Kolb's experiential learning cycle

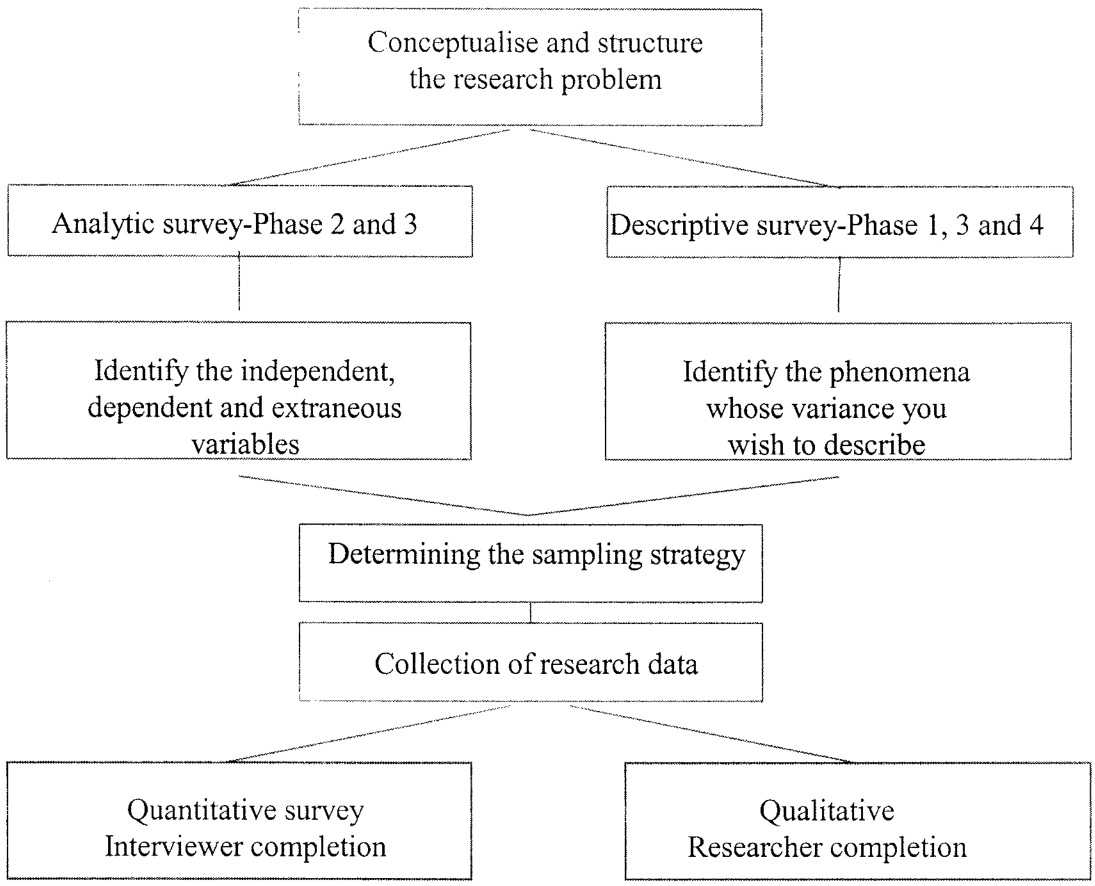


Source: Adapted from Kolb (1983)

The third and fourth research phases identify similarities and differences in two retail companies. It is suggested that the case study approach of investigating features in either one or several organisations can be useful in establishing some generalised thoughts about relationships between causes and effects (Bennett, 1991). It is an efficient method to elucidate organisational topics, both past and present, and to make recommendations about future strategies (Jankowicz, 1995). This type of exploratory qualitative research may not be as rigorous as some of the more thorough quantitative studies, but can lead to greater understanding of management issues and processes. The selection of companies included in the research is justified in section 5.5.

Gill and Johnson (1991) recommend that a plan is developed to guide the researcher through the different phases of the research (Figure 4.8).

Figure 4.8 Planning the research



Source: Adapted from Gill and Johnson (1991)

4.6 Phase One - Exploratory Research

The aim of the first phase was to evaluate how consumers conceptualise 'store image' for menswear fashion retailers. This was achieved using primarily qualitative methods via a semi-structured questionnaire. The study identified salient attributes of store image dimensions; examined stores patronised; and explored respondents shopping behaviour. The exploratory phase was conducted using survey techniques, since Jankowicz (1995: 172) points out that a survey is the "systematic and orderly approach towards the collection of data [by directing] ... questions at relatively large groups of people, in order to explore issues largely in the present". Consequently, this was judged to be the most efficient method of achieving the objectives of phase one. Results from the exploratory phase are analysed and discussed in Chapter Five.

4.6.1 Questionnaire design

The questionnaire was designed to be administered in face-to-face interviews and included both qualitative and quantitative data within four sections (Appendix 2). This type of interview is a "verbal interchange in which one person, the interviewer, attempts to elicit information or expressions of opinions or beliefs from another person or persons" (Maccoby and Maccoby, 1954: 499). Section one of the questionnaire focused respondents on menswear fashion retailing by identifying whether they had purchased menswear clothing within the last six months. If the response was positive they were then asked which stores they had patronised during the last six months. Fourteen store options were listed with opportunity to append others. Respondents could list up to three retailers.

Section two, elicited those attributes of store image important to the interviewee. They were asked to describe the image of the identified stores by listing attributes or characteristics they liked or disliked. The open question could be answered by using a one-word description or a detailed narrative, which could be positive or negative. The replies were written down verbatim. The questionnaire provided opportunity to list up to ten attributes or image descriptions. As the survey used an unassisted open-ended questioning technique, respondents were offered the opportunity to describe store image in the way they conceptualised it. The interviewee might choose to mention a number of specific image attributes; choose to describe a store by likes or dislikes; or use descriptions to explain their preferences by including store comparisons; describe goods sold; the size of store; the type of consumers frequenting the store; or they might use a mixture of all of these (Zimmer and

Golden, 1988). The interviewers administering the questionnaire were advised of this and requested to record responses accurately.

Qualitative data have a number of features which provide an opportunity to discover how people perceive the subject under investigation (Miles and Huberman, 1994). Moreover, McDougall and Fry (1974) found that, whilst respondents were able to determine image components, valuable insights could be gained by listening to how responses were phrased and could lead to a more meaningful classification than predetermined scales would provide.

When this stage had been fully explored, respondents were asked to rank their answers in order of priority. This was accomplished by allocating a number to each description with a low number indicating a high priority. Individual responses were analysed using content analysis techniques, which facilitated measurement of the frequency of attributes. Subsequently the salience of each dimension was analysed using statistical methods.

The third and fourth sections of the questionnaire both used a fully structured questioning technique to investigate preferred shopping habits and to identify the demographic profile of shoppers. Shopping behaviour was established by asking interviewees how often they visited menswear stores; for whom they purchased; and whether they preferred to shop on their own, with friends or with their partner. The demographic profile of respondents was identified based on McDonald and Dunbar (1995) approaches to consumer market segmentation based on analysis of the gender and age of respondents as well as the socio-economic description of the main provider of the household. The analysis of social class or grade is still the main indicator used by fashion marketers to ascertain consumer lifestyles, attitudes and values (Constantino, 1998) and appears to be a reasonably good indicator of consumer purchasing behaviour (Evans, 1999). The National Readership Survey define socio-economic classes as follows:

A - Upper middle class (higher managerial, administrative, professional);

B - Middle class (middle managerial, administrative professional);

C1 - Lower middle class (supervisory, clerical, junior management, administrative, professional);

C2 - Skilled working class (skilled manual workers);

D - Working class (semi and unskilled manual workers);

E - Subsistence level (state pensioners, widows with no other earner, casual or lowest-grade workers (Evans, 1999; McDonald and Dunbar, 1995).

The authors do not identify where students should be included, however, a high proportion of students hold casual jobs and would be identified to have a low income during the years of study. Thus, in this study they have been recognised to be a separate category within the E classification. For control purposes, the interviewers included details of when and where the questionnaire had been administered.

4.6.2 Piloting

It is essential to pilot surveys, but the number conducted is not important (Crouch and Housden, 1996). The questionnaire was first tested with five respondents, to identify errors and assess overall clarity. This resulted in some revisions. Then, thirty-eight retail degree students piloted the instrument and were trained to administer the survey, to ensure that all interviewers used the same wording and administered the survey in the same way. The questionnaire was revised based on student feedback and finally administered in November 1994. During the piloting students found it difficult to avoid prompting. To overcome this problem, permission was given to allow a specific prompt. Thus, if a respondent encountered difficulties in completing the open question, the interviewer could clarify by asking "What makes you choose to shop in one store and not another?" For validation purposes all the questionnaires had to be completed in the presence of two students and initialled by them both.

4.6.3 Population and sample selection

The population to be surveyed was identified as those consumers who regularly purchased menswear fashion clothing within the Glasgow area. As this sample frame is not known, it was decided that a non-probability quota sample was the most efficient way of achieving the objectives. Quota sampling involves choosing respondents to represent the profile of the population in the same proportions as the variance within population (Lehmann *et al.*, 1997). It is not as rigorous as random sampling but is representative of the population studied. Thus, each student had a quota of ten questionnaires to administer to seven male and three female consumers. Each interview commenced with a pre-screening question to identify that respondents had purchased menswear fashion clothing within the last six months. In total 380 questionnaires were to be completed by 266 male and 114 female shoppers. The breakdown of male to female was decided with reference to Mintel (1997b), which points out that more than 30 per cent of men's clothing is purchased by women for their husbands or partners.

Students were directed to administer the survey within the three main shopping areas of Glasgow, utilising all the days of the week and using different time segments to ensure the sample would contain a cross section of shoppers. The three shopping areas highlighted have different shopping profiles and contain a large number of multiple and independent menswear retailers.

4.6.4 Response rate and consumer profile

All questionnaires were checked by two researchers for validity and numbered for easy referencing. Out of the quota sample of 380 questionnaires, 343 were deemed usable and analysed; a response rate of 90 per cent. The final sample was made up of 70 per cent male and 30 per cent female respondents. Analysis of the demographic profile suggests that there is a bias of respondents who are either young students or older retired people; those, perhaps, with time available to respond to market research questionnaires (Table 4.4). All socio-economic groups were represented, but skewed towards higher managerial and student sections. This bias is partly due to interview refusals, which can partially be controlled by evaluating the sample bias against the demographic distribution of the population (Table 4.5) (Sudman, 1994). As established in the earlier discussion in Section 4.6.1, students are listed separately under the socio-economic group E, since both Evans (1999) and McDonald and Dunbar (1995) do not identify students to belong to a specific category.

Table 4.4 Demographic profile of respondents, in percentages

Gender		**Age**		**Occupation**	
Male	70	**16 - 25**	47	**A**	9
Female	30	**26 -35**	25	**B**	21
		36 -45	11	**C1**	18
		>45	17	**C2**	10
				D	9
				E **Students**	10 23

Table 4.5 UK Socio-economic groups, in percentages

Occupation of main provider	Social grade	Percentage of adults
Higher managerial or professional	A	3
Intermediate managerial of professional	B	10
Supervisory, clerical or junior managerial	C1	23
Skilled manual workers	C2	33
Semi and unskilled manual workers	D	22
Pensioners, widows, casual workers	E	9

Source: McDonald and Tideman (1996) based on British census returns

Questionnaires were administered on all the days of the week and during different time slots to minimise bias (Table 4.6). Any interview involves interaction between interviewer and respondent and they must be interpreted against the environment in which they take place (Denzin, 1989b; Hammersley and Atkinson, 1983). Since these interviews were conducted on the street or in shopping centres, the interviews had to be as short as possible and the interviewer had to record responses verbatim and these were later collated in themes.

Table 4.6 Survey administration in terms of day, time and place in percentages

Day of the week		Time slot		Place	
Monday	1	**8.00 - 11.00**	20	**Argyle Street & St. Enoch Centre**	50
Tuesday	1	**11.00 - 14.00**	41	**Buchanan Street & Princes Square**	22
Wednesday	1	**14.00 - 17.00**	35	**Sauchiehall Street, Renfield Street &Union Street**	28
Thursday	11	**after 17.00**	4		
Friday	24				
Saturday	53				
Sunday	9				

4.6.5 Analysis of data

The information generated in the exploratory phase required analysis to create meaningful categories or themes. The technique of content analysis was employed to classify data whilst ensuring that reliability and validity was being maximised (Henwood and Pidgeon, 1993). Content analysis is defined as a "research technique for the objective, systematic, and quantitative description of the manifest content of communication" (Berelson, 1952: 18). It is recommended, that rules are formulated to systematically analyse the data (Holsti, 1968). Moreover, it is preferable to have two or more people analyse data independently with the aim of gaining similar outcomes. Analysis should be conducted in a systematic way of excluding or including data by applying an agreed set of criteria. The assembly of descriptions into groups, categories or themes should be agreed by researchers to minimise the possibility of subjective influences (Holsti, 1968). The exploratory data were analysed using positivist methods of content analysis and the frequency of themes was quantified. Analysis was concerned with literal responses, since a deeper interpretation was not required at this stage.

The technique of content analysis was used by Zimmer and Golden (1988) when they analysed consumers image perceptions of three retail chains. They suggested that this method of analysing attributes gained not only quantitative data but also valuable qualitative information. Content analysis has previously been used to collate store image attributes by identifying the most frequently occurring words (Dickson, 1977; Jain and Etgar, 1976; Myers, 1960); by grouping similar terms (Burke and Berry, 1974; James *et al.*, 1976; McDougall and Fry, 1974); by using attribute components already identified in previous studies (Berry, 1969; Kunkel and Berry, 1968); or by using independent sorters to analyse descriptions (Zimmer and Golden, 1988). In this study a combination of methods have been applied.

All verbatim quotations were tabulated based on the meaning of the description. For example, individual *attributes* were assembled where the informants used the same words or similar words, such as store layout and shop layout. In the second stage, these were collated into *attribute components* when close comparable areas were covered, such as mentions of layout, interior floorspace or 'well set out'. At the third stage, related components were grouped into *attribute dimensions.* For example, all the attribute components mentioning internal factors were grouped into one dimension, internal layout, design and store appearance (Hansen and Deutscher, 1977). The categories of attribute themes were not influenced by previous research findings, as specific research into store image factors in menswear fashion retailing was not available, and the objective was to explore differences with previous generalised findings. Reliability was sought by having two researchers grouping attribute themes in all the stages. Where differences of opinion occurred an agreement was gained in defining characteristics and groupings by discussion.

The qualitative data was tabulated to enable analysis utilising a statistical package to measure frequency of responses and to evaluate importance ratings by analysing means. Furthermore, shopping behaviour and correlation between behaviour and demographic profile were analysed. Similarities and differences were examined using the chi-square test of association (Kinnear and Gray, 1994).

4.6.6 Selection of retail companies

In the exploratory survey, respondents indicated where they had made their most recent menswear fashion purchases (Appendix 11). For the next phase of the study, a number of retailers had to be selected for comparison purposes. Many fashion retailers believe their main competitors are those retailers providing similar products (Constantino, 1998). A decision was taken to select national multiple non-discount high street fashion stores from those listed by Verdict (1994) to have a measurable market share; to be trading from comparable outlets and selling main stream fashion clothing; and was targeting similar customer groups. Thus, stores such as Marks & Spencer, Bhs and Debenhams were excluded since they were perceived to be mixed retailers or department stores trading from very large outlets. Independently owned stores in Scotland, such as Slaters Menswear, Cruise and Smith's Menswear, were also omitted since they were not included in the Verdict survey and did not have an identified market share. In addition, Slaters Menswear trade from very large premises and Cruise and Smith's Menswear sell designer fashion brands rather than main stream fashion clothing and are not perceived to promote comparable products.

Marks & Spencer was the retailer most frequently mentioned by respondents followed by Next for Men, River Island, Top Man and Burton Menswear. In eleventh and twelfth position came Principles for Men and Fosters respectively. As the second survey was to be conducted in the central Glasgow area, Fosters was excluded since the company did not have an outlet in the city centre. Five retail companies remained and were selected for in depth study (See company profiles in Appendix 3). Results from the exploratory survey demonstrated that respondents purchased a high proportion of menswear clothing from these five national multiple specialist fashion retailers (Table 4.7; See also Appendix 11) and that they were acknowledged to be competing directly with each other (Verdict, 1994). The identification of where consumers chose to purchase menswear goods did not correlate to national market share results (Verdict, 1994) and this may be due to the number of retail outlets available within the area and bias in the respondent sample due to refusals.

Table 4.7 Companies selected for the second survey

Retail Company	Percentage of users	Market share (Verdict 1994)	Outlets in Glasgow area
Next for Men	36.7	2.5	4
River Island	34.4	1.7	3
Top Man	28.3	3.0	4
Burton Menswear	28.0	7.6	5*
Principles for Men	7.6	1.0	2*

n = 343
* Denotes inclusion of one outlet in Debenhams

4.7 Phase Two - Perception of Store Image

The main aim of the second phase research was to confirm the attributes identified in the first phase as salient factors in store choice and to evaluate the image of five selected retailers utilising these attributes. Moreover, since the perception by retail staff of their own store image is deemed to be important (Osman, 1993), data were generated, analysed and compared with customer perceptions. To simplify the second phase it was divided into three stages: first a survey was administered to customers of the five specialist menswear retailers; then a similar questionnaire was completed by retail employees in two of these companies; and finally, results were compared. The data analyses and discussion are presented in Chapter Six.

4.7.1 Stage One - Consumer survey

The specific objective of the survey was to evaluate the perceived image of each of the selected retail outlets, based on the eight most salient attributes identified in phase one. A multi-attribute model, Fishbein's Attitude Towards an Object (Ajzen and Fishbein, 1980; Doyle and Fenwick, 1974; Fishbein, 1963; Fishbein, 1967a; Fishbein, 1967b; James *et al.*, 1976; Kuruvilla *et al.,* 1994; Schiffman and Kanuk, 1994) was used as a tool to provide a holistic measure of store image. Fishbein suggests the model leads to a better understanding of consumer attitude towards a product or a brand and can be used to explain the complex interaction of multiple variables involved in consumer decision making. The second phase survey utilised an adaptation of this model (Doyle and Fenwick, 1974).

4.7.2 Questionnaire design

Questionnaires were designed for each of the five retail companies (Example in Appendix 4). The first section of the questionnaire ensured the respondent was qualified to be part of the judgement sample and investigated which of the other four stores, besides the specified store, the respondent patronised. Schiffman and Kanuk (1994) describe attitude measurement as having three components. A *conative* element concerned with the likelihood or tendency to behave in a certain way; in this case the future purchase intention. A *cognitive* element or the perceptions acquired by the respondent that the attitude to the object is based on a number of attributes of varying importance. The *affective* element, concerning the respondent's feelings and evaluation of the brand or store in terms of the identified attribute dimensions.

The second section of the questionnaire contained the conative component and measured the likelihood of respondents buying their next menswear purchase from the specified store (Schiffman and Kanuk, 1994). This 'intention-to-buy' question was measured on a seven-point scale, ranging from 'Very likely' to 'Very unlikely'. The data was interpreted using a uni-polar scale with the higher number indicating a greater intention. The third section measured the cognitive component and used the eight attributes of store image identified in the exploratory survey to be the most important factors (Table 4.8). These were used as variables for both the cognitive and affective components.

Table 4.8 Store image attributes

Merchandise Quality	Refund Policy and Company Procedures
Merchandise Price	Reputation
Merchandise Fashion and Style	Professional and Friendly Staff
Merchandise Selection	Internal Layout and Design

The eight questions in the third section, the cognitive component, measured the importance to the respondent of each of the eight attribute dimensions. Fishbein (1963) label these 'Behavioural Beliefs'.

All the questions measuring store image attributes utilised a seven point semantic differential scale. For example, "I believe that shopping in a store that has a good selection of clothes is ...."

Very important						Not important

For the purpose of data analysis, these questions were interpreted by using uni-polar scales from 6 for 'Very important' to 0 for 'Not important' (Ajzen and Fishbein, 1980).

The fourth section, containing the affective component, measured respondents evaluation of the specified store on the salient attributes (Schiffman and Kanuk, 1994). Fishbein (1963) names these the 'Evaluative Beliefs'. Similar to section three, this section utilises semantic differential scales for the eight attributes.

For example, "The selection of clothes in Burton Menswear is...."

Very good Very poor

These questions were interpreted using bi-polar scales from +3 for 'Very good' to -3 for 'Very poor'.

The final section defined the demographic profile of respondents, that is gender, age, occupation and postcode. The questionnaire was largely based on Schiffman and Kanuk's (1994) interpretation of the 'Attitude Toward an Object' model. A number of amendments were made after piloting and students administered the survey during November and December 1995.

4.7.3 Analysis of the multi-attribute model

Consumer responses were analysed in six stages:

1. Respondents were identified to be 'regular customers', that is customers who have purchased menswear fashion garments within the last six months, or 'browsers', which were customers exiting the store who had not purchased menswear fashion garments within the last six months;
2. Competitors were identified in terms of respondents preferences in store choice;
3. Respondent future purchase intention was evaluated;
4. Attribute importance was evaluated for the total sample and for 'regular customers' per retailer;
5. Respondent evaluation of each store was analysed;
6. Attitude towards store image was evaluated for each attribute and as a holistic

measurement per retailer (Ajzen and Fishbein, 1980; Fishbein, 1963; Fishbein, 1967b; Fishbein, 1967c; Schiffman and Kanuk, 1994).

Mean values were calculated for each attribute, both on attribute importance (salience) and store attribute evaluation (valence). A comparison of means and an analysis of variance (ANOVA) was made between different retailers. Mean values were ranked in order of importance for each store. The multi-attribute equation was utilised to calculate retailer image by multiplying the salience and valence values for each attribute dimension, and by totalling these values to provide a holistic measurement. Analysis of variance was calculated for the five group means, at each level of analysis, and a comparison made across attributes.

4.7.4 Sample selection of consumers

The survey was administered by students to a non-probability judgement sample of 750 consumers exiting outlets operated by the five retailers (consequently 150 for each retail company). Interviews were carried out over four different time periods and on all seven shopping days (Table 4.9 and 4.10). The interviewers approached shoppers leaving one of the five retailer outlets and gained respondent agreement to participate in the survey. The interviewer first identified whether interviewees had purchased menswear clothing in the last six months from one of the five companies, to ensure that the respondent was eligible for inclusion in the sample.

Table 4.9 Consumer responses per time period, in percentages

Time	9.00 - 10.59	11.00 - 13.59	14.00 - 16.59	17.00 - 20.00
Responses	5.8	55.4	34.5	4.3

Table 4.10 Consumer responses per day, in percentages

Day of the Week	Sun.	Mon.	Tues.	Weds.	Thurs.	Fri.	Sat.
Responses	6.9	20.6	23.0	13.2	11.5	12.3	12.5

4.7.5 Response rate and consumer profile

A significant proportion of responses (n = 671; 89.5 %) were deemed usable. All of these respondents had purchased menswear clothing from one of the five retailers in the last six months, but not necessarily from the retailer where the exit interview took place. As a result, a decision was made to split responses into two categories. The most important of these were respondents who had purchased menswear clothing from the specified retailer within the last six months and thus appeared to be 'regular customers'. The other group consisted of 'browsers' who had exited the store without buying any menswear clothing at that time or in the previous six months (Table 4.11).

Table 4.11 Respondent distribution by retailer

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Regular Customers	91 (71%)	69 (55%)	105 (75%)	88 (65%)	107 (76%)
Browsers	38 (29%)	57 (45%)	35 (25%)	47 (35%)	34 (24%)
Total	129	126	140	135	141

Demographic details were analysed for the total sample and for each retailer customer group to identify similarities and differences. Respondent distribution (See Table 4.12, 4.13 and 4.14) broadly mirrored the distribution of the company customer profiles (Verdict, 1994). The sample appeared to be slightly biased due to the high proportion of student responses, which might have been a result of students having a propensity to interview fellow students, however, it is confirms the market positioning of these multiple specialist fashion retailers.

Table 4.12 Respondent distribution by gender, in percentages

Gender	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Male	75	80	86	76	83
Female	25	20	14	24	17

n = 671

Table 4.13 Respondent distribution by age, in percentages

Age	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
16 - 25	44	28	63	49	46
26 - 35	24	42	23	25	35
36 - 45	18	27	9	18	14
46+	14	3	5	8	5

n = 671

Table 4.14 Respondent distribution by occupation, in percentages

Occupation	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
A	10	16	8	17	13
B	8	40	13	14	26
C1	15	16	10	31	20
C2	18	10	23	14	16
D	10	1	12	5	6
E	18	9	8	5	6
Students	21	8	26	14	13

n = 671

The majority of respondents lived within the Glasgow area and had a Glasgow postcode; some were living within commuting distance and had, for example, a Paisley postcode; and yet others had travelled from outwith the city from places such as Edinburgh, Stirling and Falkirk as well as from Dundee and Inverness. A few respondents were staying with friends and were shopping with them (Table 4.15).

Table 4.15 Geographical distribution of respondents, in percentages

Area	Percentage of sample
Glasgow area	61.5
Commuter area	10.0
Outlying area	6.6
Visitors to the area	2.2
Non response	19.7

4.7.6 Stage Two - Retail employee survey

Initially all the five retailers were approached via their head offices to allow a survey to be conducted with front line staff. The aim of the survey was to identify how employees on the shop floor perceived the image of the store and the company they worked for. However, management at River Island refused access and for more than a year management of the head offices at Burton Menswear, Principles for Men and Top Man declined to make a decision. In contrast, management at Next head office gave permission for store managers to distribute the questionnaire to their own staff. Due to these problems an alternative strategy had to be implemented.

A post hoc test was conducted on the holistic measure of attitude towards store image for all of the five retailers. The Scheffé test is recommended for complex post hoc comparisons (Diamantopoulos and Schlegelmilch, 1997; Howell, 1992). When the Scheffé test was applied to store image results for the total sample, it indicated that store image for

Next for Men (mean = 62.81) was significantly different to that of Burton Menswear (mean = 41.86), Principles for Men (mean = 41.93) and Top Man (mean = 44.38); and store image for River Island (mean = 55.25) was significantly different to that of Burton Menswear. The area manager in Glasgow for Burton Menswear was contacted and he gave permission for store managers to administer the staff survey. Thus, due to the length of time it took to get access it meant that it was only possible to survey staff from two of the retailers. Nevertheless, this did allow two retailers with different store image to be compared during both the quantitative and qualitative phases.

4.7.7 Questionnaire design

Two questionnaires were designed for retail employees and management based on the consumer questionnaire design but with two main differences. Demographic details were substituted with employment questions identifying length of employment and current job position. Moreover, a number of open questions were asked of each respondent to elicit employee perception of their target market, store environment and products (Appendix 5). The management version of the questionnaire included additional qualitative and quantitative questions to allow for supplementary information (Appendix 6).

4.7.8 Sample selection and response rate of retail employees

Managers from the two retailers were approached during the summer of 1996. Four Next for Men outlets and three Burton Menswear stores in Glasgow were used for staff and management surveys. Store managers invited staff to complete the survey and due to the voluntary basis completion rates varied; Burton Menswear 68 per cent and Next for Men 27 per cent. The lower rate of completion for Next for Men can be attributed to employment figures, which are based on the whole store and not just for the menswear department, in contrast to Burton Menswear stores, which are stand alone outlets. Company employment status and length of employment for respondents are presented in Tables 4.16 and 4.17.

Table 4.16 Retail employee responses by employment category

	Burton Menswear	Next for Men
Management	2	11
Full time staff (> 30 hours)	8	13
Part time staff (< 30 hours)	18	32
Total number of responses	28	56

Table 4.17 Length of employment of retail respondents, in number and percentages

	Burton Menswear	Next for Men
Three years or more	12 (43%)	30 (54%)
One year but less than three	6 (21%)	14 (25%)
Six months but less than one year	5 (18%)	7 (13%)
Less than six months	5 (18%)	5 (8%)

4.8 Phase Three - Segmentation Analysis

The aim of the third phase was to develop an understanding of the way consumers made their purchase decision by using a technique known as conjoint analysis (Kinnear and Taylor, 1996). This method has the advantage of enabling respondents to make choices as in a real purchase situation, by trading off features, one against others (Green and Srinivasan, 1978; Green and Wind, 1975). It is a useful tool to market researchers, as it provides a process for estimating consumer preferences in situations where complex attribute options are available. Furthermore, it allows a marketing practitioner to make decisions on the most favourable combination of product attributes for the target market (Kinnear and Taylor, 1996; Louviere, 1994). The analysis and discussion of the data is presented in Chapter Seven.

Conjoint analysis enables a concept to be disaggregated into a number of variables important to consumers in their decision making. This means that the researcher first has to identify the factors and specific levels important to consumers. By employing this technique it is possible to understand the principal dimensions involved in store choice, to evaluate how customers make their purchasing decisions and to identify sub-groups of customers in terms of similar purchase behaviour. The five stage approach of the conjoint analysis is described in the following sections.

4.8.1 Establishing attributes

The exploratory consumer survey (phase one) established factors that influenced store choice and the larger quantitative study (phase two) measured the importance of eight of these factors. The specific objective for this phase was to establish how different customer groups made judgements on store choice in terms of those attributes that could be directly influenced by retailers. The quantitative survey confirmed the four most important attributes to be merchandise price, merchandise selection, merchandise quality and the service provided by staff (Table 6.7). Hence, a series of profile cards were designed to contain these four features.

4.8.2 Assigning attribute levels

Once attributes had been established levels had to be assigned which were both credible and suited to trade-off. In many studies, price has been treated as a quantitative attribute with a number of specific prices assigned, but in this study all features were treated as qualitative with levels based on customer perception of the average for the sector. This decision was based on previous research by Amirani and Gates (1993) who used customer expectations compared with a perceived average standard. It is recognised that qualitative levels are more difficult to assign than quantitative and require thorough piloting, for levels to be meaningful to respondents (van der Pol and Ryan, 1996).

A number of pilot studies were conducted with initially two, and subsequently three, levels for each feature and the final solution was to utilise a combination of levels. This resolved feedback from respondents on the difficulty of trading off highly polarised statements. The profile cards were finally designed with three levels for price and product quality and two levels for product selection and staff service. This allowed different degrees of price sensitivity to be traded off against three levels of merchandise quality, and two levels for staff service and two levels of merchandise selection (Table 4.18). It was appreciated that most consumers would prefer lower prices and that this might be a weakness in the study. However, most studies using the technique utilise a variety of levels for each feature and this does not normally bias the results.

Table 4.18 Profile cards, features and levels

Features	Levels
Price	Generally higher than average (H) Generally average (A) Generally below average (L)
Product Selection	Providing good variety (G) Providing limited variety (L)
Staff	Giving better than average service (B) Giving worse than average service (W)
Product Quality	Generally higher than average (H) Generally reasonable (A) Generally below average (L)

4.8.3 Designing profile cards

Once the attributes had been selected and the levels assigned, profile cards could be designed to describe a hypothetical scenario. Each feature had a number of levels, which were combined in random order. The attributes and levels selected for this study gave the opportunity for 36 different combinations (3x2x2x3). To overcome the possibility of co-linearity among features and to keep the number of profile cards to a minimum, an orthogonal fractional factorial design was used (Cochran and Cox, 1950; Winer, 1973). Based on respondent evaluation of a small number of profile cards the conjoint analysis can predict the way the respondent would evaluate all the scenarios (Bretton-Clark, 1990). Twelve orthogonal profile cards were designed and two additional 'holdout' cards added, as this method provides a good test of the internal validity of a conjoint model.

Figure 4.9 Example profile card

Prices generally higher than average
Product selection providing limited variety
Staff giving better than average service
Product quality generally higher than average

How likely are you to make your next purchase here:

Not at all likely									Very likely
1	2	3	4	5	6	7	8	9	10

In essence, fourteen profile cards were designed to describe the market positioning of fictional stores based on the four selected features (Figure 4.9). The design also included a rating scale from one to ten, with a higher score indicating a greater likelihood for purchasing in a store with the described profile.

4.8.4 Method of administration and questionnaire design

Each respondent received a randomly arranged set of profile cards. Interviewees were introduced to the activity by way of two example cards (the holdout cards) and thereafter asked to rate each of the twelve profiles. This made the judgements very real as respondents were forced to consider all features at the same time, not just one against another. The advantage of using conjoint analysis is that consumers will concentrate their decision making on attributes offering high utility to themselves, when they trade-off one feature against others. Respondents could group profile cards or go back through them as much as they liked. The order in which they rated the profiles was not important, in fact it was preferred if cards were completed in a random order. The rating of each profile was noted on the questionnaire. Additionally, the respondent was asked to select one profile card that best described Burton Menswear and/or Next for Men.

Phase three of the research, the conjoint survey, was administered in Glasgow at the end of 1996 and the beginning of 1997, a year after the second research phase. The technique was applied to data generated from a new sample of customers of the two menswear fashion retailers; Burton Menswear and Next for Men. A questionnaire was designed for the survey that included the responses to the profile cards (Appendix 7). The first two questions were included to select the judgement sample of customers (Crouch and Housden, 1996). The respondent was asked whether they had purchased fashion clothing from one of these two retailers in the last six months and, if the response was positive, the interviewee was required to indicate, in percentage terms, the disposition of purchasing from this retailer again within the next six months. This was ascertained by respondents rating the likelihood on a scale of 0 to 100; where 0 represented 'not at all likely' and 100 represented 'extremely likely'. If the score was 50 or higher, respondents were defined as regular customers. Respondents were also asked two qualitative questions. The first question sought to elicit why the respondent chose to shop at that particular store and the second whether there were any improvements they would like the retailer to make. The concluding section contained questions to identify the demographic profile of the respondent.

4.8.5 Evaluating customer preferences, segment size and utilities

Conjoint analysis is based on a linear additive model to determine consumer preferences. When conducting a conjoint analysis, the utility or 'part-worth' of the concept is assumed to be equal to the sum of utilities or 'part-worth' of each feature. This means that the technique presumes that individuals, when they make their judgements, aggregate the benefits of each feature to verify their preference (Hair *et al.*, 1995).

The model is specified as:

$U = \beta_1 + \beta_2 + \beta_3 + \beta_4$

where:

U is the overall utility or preference score for the fictional store

β_1 is the part worth of $level_i$ for price

β_2 is the part worth of $level_j$ for merchandise selection

β_3 is the part worth of $level_k$ for staff service

β_4 is the part worth $level_l$ for merchandise quality.

The first analysis was carried out for each respondent separately, at the disaggregate level, and the fit of the model was examined. At this point, responses that did not fit the model were excluded from further analysis. This could have been due to respondents not understanding the task required of them. Then group statistics were analysed at the aggregate level taking into account that whole populations are not generally homogenous and thus these results could be misleading. Findings are not utilised to evaluate individual preferences, but are analysed to enable estimation of market share (Hair *et al.*, 1995) but this is not required for this study.

The final stage evaluated customer preferences by establishing the segment size of each sub-group and the 'utilities' of each level for each feature. That is, the benefits perceived by respondents for each attribute at the appropriate levels. Thus, the overall perceived benefits to customer groups can be calculated by adding the individual utility value for the appropriate level of each feature. For the purpose of this analysis, clusters were identified for the retailer to a level where customer preferred product combinations were different, but the size of each customer group appeared to be worth investigating and targeting.

This phase of the research explored the way consumers made their preferred purchase decisions by trying to understand how customers traded-off the four attributes of product price, selection of product, product quality and the service provided by staff. The results indicated the presence of groups, their preferences and relative size (Bretton-Clark, 1993).

4.8.6 Sample selection, response rate and consumer profile

The questionnaire was administered to regular customers of Burton Menswear and Next for Men by a group of students. Each student had four questionnaires to complete with a judgement sample. In all, 244 questionnaires and sets of profile cards were administered. Half of the questionnaires were given to predominantly Burton Menswear shoppers and the other half to Next for Men customers. Profiles were only used if the respondent could be included as part of the judgement sample by having purchased from the company within the last six months and if the likelihood of shopping again with the specified retailer within the next six months was rated 50 per cent or above. Of these, 97 questionnaires for Burton Menswear and 107 questionnaires for Next for Men were included in the final conjoint analysis; a rate of 80 and 88 per cent respectively. The group of respondents included in the analysis appeared to be a fair reflection of the target market. That is, Burton Menswear has a higher response rate from C2 customers than Next for Men (Table 4.19).

Table 4.19 Customer profiles, in percentages

	Gender		Age		Occupation	
Burton Menswear	**Male** **Female**	61 39	**16-25** **26-35** **36-45** **>45**	51 23 15 11	**A** **B** **C1** **C2** **D&E** **Students**	16 16 17 28 8 13
Next for Men	**Male** **Female**	60 40	**16-25** **26-35** **36-45** **>45**	42 25 20 12	**A** **B** **C1** **C2** **D&E** **Students**	17 18 17 17 9 23

Note: not all columns may add to 100 due to rounding.

4.9 Phase Four - Qualitative Research

The aim of the fourth phase was to explore the development of retail marketing strategies and to identify how different companies work to strengthen consumer perception of their outlets through store positioning. It was judged that the best method to obtain insight and understanding of these issues was to utilise inductive qualitative methods, which involved listening to people's experiences and observations. The aim of the key informant interviews was to tease out the mechanisms and conditions management recognised as being important in communicating to their target customers. Miles and Huberman (1994) point out that qualitative research has a number of characteristics when practised in a 'live' situation: a search for significant themes; an understanding of the holistic position, the factors involved and their inter-relationship; and a discovery of how people in different job-positions understand the situation. Furthermore, qualitative research seeks to increase knowledge by applying the information to existing theories.

Key informant interviews are effective because respondents have specialised knowledge due to their position in a company. The pertinent issues can be extracted by the researcher from this data by interpreting the way these are comprehended by the interviewee, deduced from their personal experience and practised in the organisation (Tremblay, 1982). The interpretation of the information is presented in Chapter Eight.

4.9.1 Questionnaire design

Empirical research sought to compare marketing strategies for two of the UK's leading multiple specialist menswear fashion retailers: Burton Menswear and Next for Men. These retailers were selected previously on the basis that store image perceptions by customers were disparate. The objective of the semi-structured interviews was to generate qualitative data that would permit interpretation of the phenomena under investigation. Therefore, interviews were structured into subject headings based on findings from the previous research phases. The loose sequence of open-ended questions allowed the interviewee the opportunity to raise issues not mentioned in the questionnaire structure. As such, the interviewer allowed the content and quality of information to be directed in part by respondents as long as the purpose of the interview was being achieved. The lack of definite structure also gave the researcher freedom to probe areas, which during the interview presented opportunities not previously envisaged (Denzin, 1989b). Both the senior marketing managers and one store manager requested that an outline of the questions should be submitted before the interview to prepare for the meeting. Hence, a longer version of the interview structure, which included a question for each heading was designed to give prospective interviewees guidance about the type of questions they would have to answer (Appendix 8).

4.9.2 Sample selection

Patton (1990) recommends that purposive sample selection should be used for qualitative interviews and respondents should continue to be selected until interviewee contributions do not add additional useful information. Gummesson (1993) confirms that additional respondents should be decided by saturation until augmentation provided by additional respondents no longer takes place.

It was not necessary to use a sample frame or make the sample representative of the population, as the aim of using qualitative techniques was to explore and understand opinions, but respondents were selected with the intent of being able to present views and experiences from different levels within each company. Hence, it was considered important to gain information from selected employees who had different job responsibilities within the same company. Senior managers were contacted to gain permission to conduct in depth interviews with employees. Both companies were willing to co-operate and in return were promised the findings from the consumer research phase.

Respondents were interviewed during the summer of 1997 and included a sales assistant, two store managers, an area manager and a marketing manager from each company (Appendix 9). By initially conducting two interviews with store managers, in which the second interview provided little additional information, Gummerson's (1993) point about saturation of information was experienced. From then on only one specialist at each level was interviewed. A total of ten interviews was conducted. A store manager from each company piloted the semi-structured interview format and changes were made to refine the format. Furthermore, these first interviewees recommended key personnel who were in a position to discuss the issues from a different perspective.

4.9.3 Fieldwork method

Face-to-face interviews are a convenient but time consuming way of gaining in depth opinions and views of company representatives. The shortest interviews, lasting between 30 and 45 minutes, were with sales staff, whereas the duration of conversations with marketing managers and area managers averaged 90 minutes.

The interviews were conducted as objectively as possible although no interviewer can be completely objective as they themselves are interacting with the interviewee and hence part of the situation (Hammersley, 1992; Sayer, 1992). Interviews are social events, which must be translated and the meaning understood as part of the situation in which they take place (Denzin, 1989b; Hammersley and Atkinson, 1983). Consequently, all interviews were conducted at the interviewees chosen place. This was normally at their place of work, which allowed them to relax and encouraged them to speak freely. Conversations were recorded and transcribed after the interview and notes made about relevant behaviour. As note taking during the interview was not necessary, it facilitated the continual flow of information, although the recording of interviews may have put a constraint on some of the interviewees. Accordingly, the degree of openness and respondents critical evaluation of their own company may have been affected even if individual confidentiality had been assured (Silverman, 1993).

4.9.4 Analysis of qualitative data

Transcriptions were checked against recorded interviews and amendments made. The volume of information generated was overwhelming and required reduction and sorting. There are three linked processes involved in qualitative data analysis: data reduction, data display and conclusion drawing and verification (Miles and Huberman, 1984). First data had to be reduced within the conceptual framework of the study. All through the process of transcription of interviews, categorisation, identification of emergent themes, clustering of these and writing up the results, data was selected and condensed (Huberman and Miles, 1994). Huberman and Miles (1994) define data display as a systematic and abridged version of reduced data that allows for the final stage of discussion and conclusions to be made. This involved drawing a meaning from the data and identification of causal explanations and relationships.

Mason (1996) outlines three methods of sorting and analysing qualitative data: cross-sectional and categorical indexing; non-cross-sectional data organisation; and the use of diagrams and charts, but points out that these are not mutually exclusive methods but can be combined. The first method is recommended for text based data where a systematic overview is required, topics are not presented in an easily accessible manner and generation of conceptual themes aide analysis and comparisons (Mason, 1996). In this study, categories and sub-categories were based on the realist philosophy of identifying structures, mechanisms and conditions that could create an effect or a result. Within these structures, company strategies were identified where interventions could manipulate conditions which could lead to wanted or unwanted results.

The first stage of sorting the data was to colour code hard copies of transcripts, one for each company. In the second stage each interview was indexed with respondent's initials. Having read all interviews several times content analysis techniques were utilised for the third stage (Holsti, 1969). This meant grouping responses into categories that allowed for interpretation in terms of interview emphasis (Mason, 1996). The final sorting stage identified sub-categories within each theme.

Thus, analysis used categorical indexing methods to compare the two case studies and six separate themes emerged:

- Target customer groups and main competitors
- Commercial management
- Product and brand characteristics
- Customer service
- Marketing communication
- Future developments.

Even within these broad themes the researcher is not neutral, but influences, during the sorting stage, the way analysis is interpreted and by the way data is sub-grouped into categories or even omitted from interpretation (Mason, 1996). Some of the problems involved with the cross categorisation of data are that broad categories become too large for in depth analysis, that sub-categories also relate to other categories and linkages may be missed or are only possible when using transcripts of interviews based on a similar structure (Mason, 1996). The last limitation is not an issue in this study as all interviews had similar objectives and responses allowed sorting into broad themes. The other weaknesses were overcome by using a diagrammatic analysis in the final discussion to identify causal linkages between themes and sub-categories (Miles and Huberman, 1994).

The data analysis sought to emphasise respondent interpretation and understanding of the issues related to each theme and sub-category by using comparative explanations to provide evidence for causal mechanisms or linkages. Miles and Huberman (1994: 432) propose that researchers should use a number of tactics in analysis of qualitative data:

1. Noting patterns and themes;
2. Seeing plausibility;

3. Clustering;
4. Making metaphors - to improve integration of data;
5. Counting - to ensure integrity of analysis;
6. Making contrasts and comparisons;
7. Partitioning variables – re-categorisation or sub-grouping of data;
8. Subsuming particulars into the general, shuttling back and forth between first-level data and more general categories;
9. Factoring - allowing observable data groups to be summarised into hypothetical variables;
10. Noting relations between variables;
11. Finding intervening variables;
12. Building a logical chain of evidence;
13. Making conceptual or theoretical coherence - by making comparison referent constructs in literature.

This study accepts the realist approach to research and as such promulgates that qualitative data is particularly useful in identifying causal relationships by demonstrating how a number of processes lead to specific events (Miles and Huberman, 1994; van Maanen, 1979). Miles and Huberman's (1994) suggested process for analysis has in general terms been applied to the data and the outcomes are discussed in Chapters Eight and Nine.

4.10 Data Validity and Reliability

Fielding and Fielding (1986) recommend that the same criteria of internal, external and construct validity, which is normally applied to quantitative research, can also be utilised in qualitative studies. Construct validity refers to the ability of the research method to measure the identified concepts; internal validity reflects the extent to which interviewee responses are being interpreted; and external validity concerns the ability of replicating the study.

Furthermore, the construct validity and reliability in qualitative studies are observed by using content analytical methods to highlight themes that are repeated in different responses. In this way qualitative analysis follows the same rules as quantitative analysis by using repeated measurements (Fielding and Fielding, 1986). Internal validity, to assure consistency at the qualitative phase, was ensured by checking responses within each organisation with other interviewees. By describing in depth the way data was analysed to enable the study to be replicated within the same organisations but in different locations or with other retail companies affirms the external validity.

In the quantitative phases, reliability has been achieved by administering data collection and analysing information in a systematic and objective way. For example, an additional researcher was employed to ensure consumer statements were allocated to the correct theme and reliability tests were applied to the quantitative data. Reliability was concerned with the consistency and accuracy of data collection and analysis. This is not viable with qualitative information, but the methodology should ensure that the qualitative data generated were analysed in an honest and accurate way to reflect the concept and objectives of the study (Mason, 1996).

Analysis of qualitative results is open to criticism of subjectivity as interviewee data is interpreted by the interviewer and this information might have been portrayed differently by another interviewer. The realists defend this by pointing out that the person interacting with the interviewee can interpret the phenomena in much greater depth as a result of participating and emphasising in the exchange of views (Sayer, 1992). Another criticism about the validity of qualitative data is that the inferences about causal linkages that may not be identified due to the small size of the purposive sample (Sykes, 1991). It was found that saturation of information was reached by interviewing two store managers and the other interviews discussed the same phenomena from differing perspectives but did not yield new areas or discussion.

4.11 Limitations of the Quantitative and Qualitative Research

All research studies investigating social science phenomena are subject to certain limitations compared to scientific investigations, where conditions can be controlled (Denzin, 1989b). In evaluating the results these limitations, therefore, have to be taken into account.

- The consumer surveys were administered to a population for which there was no clear sample frame and thus respondents were selected based on non-probability samples. This means that results cannot be generalised (Denzin, 1989b).
- An effect may arise due to the number of respondents refusing to participate in the surveys (Denzin, 1989b; Luck and Rubin, 1987; Sudman, 1976). Furthermore, the companies in question target specific socio-economic groups and the survey contained a customer profile that was at variance with these published figures.
- An unidentified number of respondents answered the socio-economic question of social class based on their own profile rather than that of the occupation of the chief wage earner. For example, students were identified during piloting to be a separate group but they are not included in the National Readership Survey (Constantino, 1998; McDonald and Dunbar, 1995).
- Marks & Spencer, the company with the largest market share of menswear clothing was excluded from the study because of its different trading format.
- The questionnaires relied on a number of students administering the surveys and differences in interviewing and reporting techniques could have occurred even with

safeguards put in place (Denzin, 1989b).

- The questionnaires relied on consumer and employee ability to recall, analyse and synthesise information relevant to this study. Not all respondents would be equally capable of doing this and some may have taken more time over completion than others.
- A problem can arise by respondent falsification or fabrication of responses. These are difficult to control in structured questionnaires where the interviewer cannot probe the interviewee responses (Denzin, 1989b).
- There are problems connected with using key informant interviews that may introduce error due to falsification or misunderstanding of information on behalf of the interviewee.
- As this study was conducted over a number of years, the surveys and interviews were not all completed at the same time and consumer and employee perception of store image could have undergone changes over this period (Denzin, 1989b).
- A number of processing errors may also exist although double checking of analysis and data inputs should have minimised such bias and errors (Denzin, 1989b).
- Qualitative data is open to personal and professional bias and may also lead to misinterpretation by the researcher (Demming, 1944). The researcher's previous experiences and preconceptions would influence the interactions within the interview. The outcomes and meanings following the analysis may also be affected by the interviewer's position although attempts were made to be as objective as possible. When opinions were expressed by the researcher in the qualitative interviews, these were as a result of the analysis of consumer data. All the interviews followed a similar format and analyses and syntheses of data were identical to minimise the effect of bias.
- The quantitative surveys were all administered in Glasgow and thus are not able to be generalised to the whole population or the whole company.

- Constraints of time and resources will affect most studies (Luck and Rubin, 1987). For example, larger populations could be used for the quantitative analysis and a computerised package could have been used for analysis of the qualitative data but time and financial resources were limited.

4.12 Conclusions

This chapter commenced with a philosophical discussion about the realist ontological opinion about research methods and concluded that a combination of quantitative and qualitative methods was the most suitable way of achieving the research objectives.

In the first phase of the research, a qualitative approach was utilised to identify consumer reasons for store choice. A quantitative phase confirmed the salient attributes and measured and compared customer and staff perception of these attributes for a number of multiple specialist menswear fashion retailers. The third phase combined qualitative and quantitative techniques to obtain a deeper understanding of consumer decision making of store choice and the final phase used purely qualitative methods to interpret retail employee opinions and perceptions of the marketing strategy. The advantage of using a combination of these techniques is to build on the strengths of each, whilst minimising the limitations of specific methods.

A number of limitations have been identified, but efforts have been made to minimise these and as a result data has been interpreted to enable an insight into consumer and employee perception of store image and the way factors contribute towards image formulation. However, marketing strategies have also been investigated and results have been compared with retail employee and customer perceptions. Findings from the four research phases are presented in the following chapters.

CHAPTER FIVE

PHASE ONE: EXPLORATORY RESEARCH

5.1 Introduction

Market positioning, based on price, product differentiation and service provision, is central to the competitive strategy of multiple retailers (Walters and Laffy 1996; Wortzel 1987). Research into these areas influencing store choice has mainly been carried out in supermarkets or department stores and only a limited amount in speciality retailing. Previous studies confirm that, in the minds of the consumer, key attributes and their order of sequence differ from sector to sector. The purpose of this first exploratory phase is to examine choice characteristics and to identify salient attribute dimensions in the purchase of menswear fashion clothing.

The exploratory phase used mainly qualitative methods by conducting face-to-face interviews in administering a structured questionnaire. Respondents were asked to identify those characteristics or attributes they thought best described the image of the stores from which they normally purchased. It was assumed that these attributes would indicate reasons for store choice in the purchase of menswear fashion clothing. A content analysis of the data facilitated the formation of fifteen attribute dimensions, summarised from respondents store choice descriptions, and an indication of the salience of each dimension mentioned. Furthermore, the results identified the shops recently used by respondents and the chapter concludes with an analysis of respondents preferred shopping behaviour.

5.2 Content Analysis of Attributes

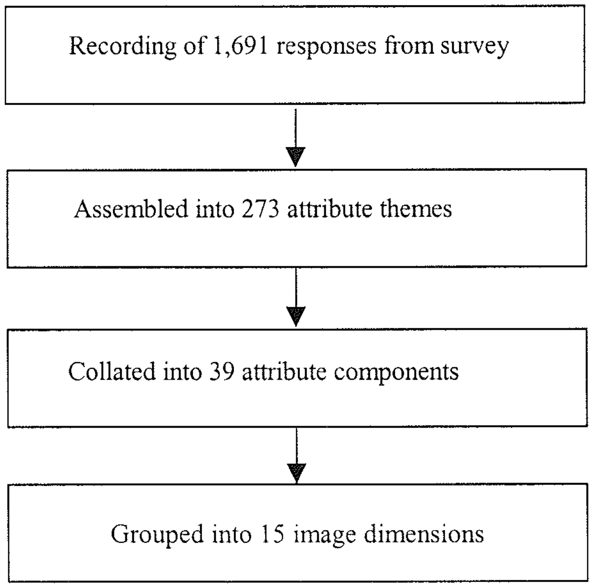
The review of previous literature identified that the majority of studies used bipolar scales with predetermined image attributes. In contrast, this study allowed respondents to choose how they would like to answer the open-ended question identifying store characteristics, or attributes influencing store choice. From the 343 useable questionnaires, a total of 1,691 responses were collected, a mean of five. The data confirm the view that consumers prioritise factors most important to themselves and base their choice on a few factors and not on all the information available to them (Miller, 1956).

5.2.1 Content analysis process

Responses were analysed using content analytical methods to determine consumer perception of store image and to identify reasons for store choice. The methodology (Chapter 4, Section 5.4) described the method of the content analysis as it was applied to the data. There were three stages to the analysis: first individual attributes were assembled into 'image attribute' themes; second, these attribute themes were collated into 'components'; and, finally, components were grouped into 'dimensions' (Fig. 5.1) (Hansen and Deutscher, 1977). Hence, the first stage of the analysis was to collate the data from the 343 questionnaires into 'image attributes' and 273 different themes were identified. A number of these image attributes were related, and thus, at the second stage of analysis they could be grouped into 39 'image components' (Appendix 10). In the final stage, associated components were collated into 15 'attribute dimensions' (Table 5.1).

All dimensions were arrived at using the same process. For example, content analytical techniques identified the dimension of 'professional and friendly staff' to be relevant. All descriptions containing a reference to staff were assembled into themes using respondents' exact wording. In total there were 15 different mentions with regard to staff attitude and these responses were collated under one component, 'Friendly Staff', and included both positive and negative responses, such as friendly or unfriendly staff; helpful; attitude of staff to customers; personal advice; relationships with staff; made to feel appreciated; etc. Finally, components that were similar were grouped into an attribute dimension. In this case there were six attribute components: professional staff; friendly staff; attractive staff; customer service; pressure to buy; and queues. The six component groups were all related to service provided by staff and, thus, were grouped together. In all cases key verbatim quotes were used to identify which 'image attribute' respondents were identifying and to aggregate attributes into components. A record was kept of all quotations under each component and dimension and checked by the second researcher.

Figure 5.1 Content analysis of store image responses



5.2.2 Attribute importance

Respondents first completed the open question and subsequently ranked their responses in order of importance. The most important characteristic was allocated a mark of 1, the next a mark of 2 and so on. Hence, it was possible to analyse the frequency of each mention and its importance ranking by measuring the mean of each attribute (Table 5.1).

Table 5.1 Ranking and frequency of mentions of attribute dimensions

Attribute Dimensions	**Mean**	**Frequency of Mentions**	**Frequency in Percentage**
Merchandise quality	2.00	249	72.6
Merchandise price	2.20	309	90.1
Merchandise fashion and style	2.22	132	38.5
Merchandise selection	2.75	163	47.5
Refund policy and procedures	3.45	20	5.8
Reputation	3.65	23	6.7
Professional and friendly staff	3.66	247	72.0
Internal layout and design	4.09	160	46.6
Opening hours	4.33	3	0.9
Location and parking	4.57	79	23.0
Atmosphere	4.61	72	21.0
Merchandise presentation	4.63	35	10.2
Facilities	4.95	22	6.4
Promotions	5.43	21	6.1
Windows and fascia	6.00	21	6.1

n = 343; mean calculated on 1 = most important, 2 = next most important etc.

Results indicate that 'merchandise price' was mentioned by 90.1 per cent of the sample, but that price, with a mean of 2.20, was not the most important factor in deciding where to shop. 'Merchandise quality' (response rate 72.6 per cent) was perceived to be more important than price with a mean of 2.00. There was no significant difference between responses based on gender, age groups or occupation.

Value is often identified as the main store choice factor (Dodds *et al.,* 1991; Monroe, 1990; Monroe and Petroshius, 1981; Sweeney *et al.*, 1997; Verdict, 1994), but only 16 respondents specifically mentioned 'value for money'. However, when it was listed it was given high importance with a mean of 2.4.

'Merchandise fashion and style' was deemed very important for 38.5 per cent of respondents with a mean of 2.22. This result may have been influenced by the proportion of younger people completing the survey, although there was no significant difference between demographic groups. The 'merchandise fashion and style' responses included mentions of style of clothes, trend-factor, originality, brand names and labels, quality names, designer labels, individuality, exclusivity and up-market statements.

'Merchandise selection' was mentioned by 47.5 per cent of respondents with a mean of 2.75. Thus selection, comprising a good and varied range of clothes with a reasonable quantity of stock, appears to be very important to shoppers.

The attribute dimensions of 'refund policy and company procedures' and 'reputation' both received a low response rate of around six per cent, but both were of fairly high importance with means of 3.45 and 3.65 respectively.

'Professional and friendly staff' and 'merchandise quality' both achieved a similar number of mentions (247 and 249 respectively), but customers perceived professional and friendly staff, offering good customer service less important than the merchandise attributes 'quality', 'price', 'fashion' and 'selection'.

One hundred and sixty respondents (46.6 per cent) mentioned 'Interior store layout and design'. Three components contributed to this dimension: layout, design and store appearance. The individual attribute themes mentioned most often were the style of the shop, tidy layout, ease of shopping, the design of interior and the shop appearance and style. Although interior layout (mean of 4.09) was mentioned by nearly half of the respondents it was not perceived as important as merchandise factors. This suggests that store layout may attract shoppers, but is not likely to initiate a purchase. On the other hand, poor and cluttered layouts with narrow aisles may discourage a potential customer from buying. These findings support the view that consumers have more than a purely functional approach to fashion clothing purchasing.

The eight image dimensions mentioned above represent the main reasons for store choice in the menswear fashion sector. Only three people mentioned 'opening hours'. This could possibly be due to the fact that many stores in Glasgow city centre are open on a Sunday and have a late night opening on a Thursday. Of the rest, 'location and parking' and 'atmosphere' obtained responses of 23 per cent and 21 per cent respectively and were ranked tenth and eleventh in importance. With regard to 'atmosphere' respondents mentioned attributes such as shop comfort, the aura and ambience, the relaxed atmosphere, a clean and bright environment, its olfactory sense and air conditioning in a store.

'Merchandise presentation' with a 10.2 per cent response rate and an importance ranking of 4.63 included comments about the tidiness of a store, whether stock was ironed and well presented, and called for stock presentation that was 'not too tacky'. Based on retailers perception of the importance of visual merchandising it is surprising that it was ranked so low by consumers.

Store 'facilities', i.e. escalators, facilities for the disabled or children, space for wheelchairs and prams as well as other products offered under one roof, were important to some respondents as were 'promotions', i.e. special offers and advertising. 'Windows and facia' were mentioned by very few people and was the concluding theme when results were ranked. Retail managers give great importance to their window displays and design of their shops to attract shoppers, yet customers do not appear to consider it a substantial choice factor.

5.3 Store Patronage

The questionnaire examined which menswear fashion retailers the interviewees had patronised within the last six months. Data indicated that 41.1 per cent had purchased menswear clothing from Marks & Spencer. This is not surprising as Marks & Spencer has the largest share of the UK menswear market with 16.9 per cent (Verdict, 1994). Multiple specialist fashion retailers were the next most used shops with Next for Men (36.7 per cent), River Island (34.4 per cent) and Top Man (28.3 per cent) compared to their UK market share of 2.5 per cent, 1.7 per cent and 3.0 per cent respectively (Appendix 11). This data may be skewed due to the high proportion of younger respondents in the sample as these retailers target younger age groups.

Burton Menswear was listed as the fifth most frequented shop with 21.0 per cent of respondents having shopped there. Its market share is 7.6 per cent, which is more than Next for Men, River Island and Top Man added together (Verdict 1994). Bhs and Debenhams were ranked eight and ninth on the list although their UK market share is estimated by to be 2.7 per cent and 4.2 per cent respectively (Verdict, 1994). Three independent locally owned shops were also listed in the top 12. These were Slater Menswear with 21.0 per cent, Cruise with 16.9 per cent and Smith's Menswear with 9.6 per cent. Independent retailers have a 17.5 per cent market share of men's clothing (Mintel, 1997d) and this may be even larger in a city like Glasgow where fashion outlets are prominent (Hyams, 1996).

5.4 Shopping Behaviour of Respondents

Consumers were asked to evaluate how they preferred to shop for menswear fashion clothing. About a fifth said they went into fashion shops every week and nearly half of all respondents said they shopped approximately once a month. Just under a third shopped about four times a year and the remainder, less than one twelfth of the interviewees, only shopped about once a year. Women appeared to shop less frequently than men for menswear fashion, with just over a third of women shopping monthly and a third shopping about four times a year on behalf of their partner (Chi-square = .01). In contrast, a quarter of all male respondents shopped at least once a week and about half went into menswear fashion shops on a monthly basis. There was no significant difference in frequency of purchasing behaviour based on occupational groupings.

The shopping purpose occurrence was split into three choices: shopping for yourself, for a present or for your partner. As expected, women purchased mainly for their partner, but this was followed closely by shopping for presents. Male respondents predominantly 25 to 35 year olds, in the main shopped for themselves. A third of the respondents, mainly the over 35 year olds, would be accompanied by their partner. A quarter of both male and female shoppers liked to have friends with them when they shopped. These respondents tended to be under 25 years old. Only a third of women and just under half of the men preferred to shop on their own.

5.5 Limitations of the Survey

Respondents found it difficult to be precise about the attributes or characteristics contributing towards the image of a store. They could not articulate why they had chosen a particular store and found the terms 'attributes' and 'characteristics' difficult to comprehend. It appears that shoppers find it complex to conceptualise what they are evaluating when deciding where to purchase goods and, thus, find it hard to voice their perceptions (McDougall and Fry, 1974). When consumers were asked why they purchased clothing from a particular store they found it much easier to explain their choice. Zimmer and Golden (1988) found respondents could readily describe 'the image of Sears', but had difficulty when asked 'to describe Sears' and many respondents asked what was meant by the question.

Consumers extract relevant marketing information and when asked to recall their reasons for store choice they will generally mention the most important points and describe a representation of what the chosen store signifies to them (Mazursky and Jacoby, 1986). Furthermore, Mazursky and Jacoby recommend that surveys should only be administered with regular customers since characteristics may be distorted, confused or forgotten by respondents if they have not recently visited the stores in question.

In addition, problems may occur due to some respondents giving false answers, having misunderstood the instructions (Bennett, 1991) or because some interviewers make specific prompts or suggestions. For this phase of the study it was identified, during piloting of the survey, that respondents had difficulty in understanding the exploratory question and interviewers had to make suggestions such as 'what respondents liked or disliked about a store' or 'why they chose to shop in a particular store'. Consequently, it was decided that all interviewers could prompt by asking: "What makes you choose to shop in one store and not another?" The results of the content analysis make this evident by the number of positive and negative responses such as 'excellent quality'; 'friendly staff'; 'not too much loud music'; and 'not staffed by pushy staff'.

Most respondents found it easy to prioritise their list of attributes and, hence, would have found it easy to rate a predetermined list. Several studies have used researchers pre-determined attributes, but this would have prejudged consumers store choice factors and may have led to the omission of important aspects or details of merchandising, service or facilities that shoppers find important.

Besides having difficulty in getting respondents to explain their conceptualisation of store choice factors, interviewers had a problem in getting a non-biased sample due to the number of people who refused to respond. Interviewers found that people who work were generally too busy to stop and answer questions. Thus, a bias is introduced by including a higher proportion of students and retired people in the sample as they have more time available. Non-response bias in samples do provide error, but as this survey incorporated 343 responses from a reasonable cross section of shoppers the bias, at this exploratory stage, was not perceived to alter the result in a way that would affect the next phase of the study.

5.6 Conclusion

This chapter contains the results of the first phase of the study. The main objective was to identity attributes important to consumers when shopping for menswear fashion clothing. Fifteen attribute dimensions were identified based on 343 responses and 1,691 individual attribute mentions. Many of the detailed responses offered were specific attributes such as price or quality, but a few respondents used holistic terminology e.g. everything under one roof, nation wide retailer and store being busy (MacInnis and Price, 1987). Zimmer and Golden (1988) found that although some consumers described stores by the way of comparison to other stores or global descriptions the majority described stores in attribute specific terms in a positive or negative way e.g. good selection, low prices and good quality merchandise. This exploratory phase confirmed their finding as the majority of responses were positive, although a few interviewees used negative statements. In some cases store image was described in terms of the products offered, e.g. shoes or designer labels, and a few respondents described stores by the customers they attracted or what their friends thought about a particular store. These responses confirm research completed about conceptualisation of store image as being a combination of specific and global attributes; positive and negative responses; as well as including product comments and behaviour responses (MacInnis and Price, 1987; Zimmer and Golden, 1988).

Lindquist's (1974) list of image attributes was developed by reviewing existing findings and describes image elements relating to any type of store. The findings of this survey are specific to menswear fashion retailing, however, many attributes on Lindquist's list are contained within the attribute dimensions identified to be important in fashion clothing purchasing. Even if respondents did not mention some characteristics listed by Lindquist, this exploratory study confirms previous findings that merchandise characteristics, such as quality, price, selection and fashion, are the most important choice criteria. In addition, the results stress that 'professional and helpful staff' and 'interior layout' are determinants of increasing consequence. It is suggested that consumer expectation has increased for both these factors and that they are more important in fashion retailing than in other sectors.

Shopping behaviour was also investigated and it appears that younger male shoppers are happy to shop on their own, but that more mature men shop with their partners when making fashion clothing purchases. Most men purchase clothing for themselves or take their partner along for advice, but women appear to be happy to buy menswear clothing on behalf of their partner as well as purchasing menswear fashion merchandise as presents. This is partly a result of standard sizing, which makes purchasing of items like shirts and knitwear very easy, but also the ease by which products can be exchanged (Mintel, 1993a). Menswear retailers target male shoppers, but do recognise that between a quarter and a third of purchases are made by women. However, this does not appear to influence in-store communication, store layout or merchandising which are designed to attract the end user and not the female partner (Mintel, 1993a).

The exploratory survey elicited a list of the stores frequented by respondents and Marks & Spencer was the store listed by the majority of shoppers being the retailer with the largest market share. A number of national multiple specialist fashion retailers were also listed such as Burton Menswear, Principles for Men, Top Man, River Island and Next for Men. These companies all have prominent stores in Glasgow City centre and trade from similar sites. Consequently, the next phase will use these five high street retailers for comparison. Although, Marks & Spencer was used by the majority of shoppers this retailer was excluded from the second phase of the research since their store format and size is not comparable to that of the multiple specialist fashion retailers.

CHAPTER SIX

PHASE TWO: PERCEPTION OF STORE IMAGE

6.1 Introduction

The research objectives of the second phase were to measure and compare consumer and retail employee attitude towards store image, using a multidimensional attribute model as the measurement tool (Ajzen and Fishbein, 1980; Doyle and Fenwick, 1974; Fishbein, 1967a; James *et al.,* 1976; Kuruvilla *et al.,* 1994). This chapter reports the analysis of the consumer and retail employee data.

First, consumer responses for the five selected retailers are analysed in terms of the importance of contributing factors towards store image for menswear retailers. The findings also evaluate each retailer image as perceived by their regular customers and a comparison is made. Secondly, analysis of retail employee questionnaires is compared for two of the retailers and findings of consumer and retail employee surveys are summarised and contrasted.

6.2 Stage One: Consumer Survey

The quantitative analysis, undertaken in phases two and three of the research, is complementary to the qualitative phases. The positivist approach, that if something exists it can be numerically measured, means that the researcher has to concentrate on a limited number of variables deemed important. Repeated observations or information can be aggregated and data analysed by statistical methods to decide whether results are significant and factors are interrelated (Jankowicz, 1995). In this instance, the information used for the consumer survey was selected from the qualitative content analysis in phase one, which confirmed specific attributes as contributors to store choice and formulation of store image. By applying triangulation in the second phase, that is cross checking results from phase one with phase two, the importance of specific attributes can be measured and the contribution to store image evaluated (Kane, 1985).

6.3 Stage One: Analysis of Consumer Survey

Initial analysis confirmed that perceptions differed, if respondents were regular customers of a retailer, rather than just having a look around, comparing prices or generally browsing. Thus the first level of analysis involved dividing respondents into 'regular shoppers', who had purchased menswear clothing from the retail shop being evaluated during the last six months, and 'browsers', who had not made a purchase at that retailer during the last six months.

The next analysis calculated the likelihood of consumers making repeat purchases from the retailer (Ajzen and Fishbein, 1980; Fishbein, 1967a). The subsequent analysis identified the importance of store image attribute dimensions to respondents as well as evaluating the specified store on the same attributes. Finally, attitude towards store image was calculated for the five stores and differences highlighted.

6.3.1 Regular shoppers versus browsers

The consumer interviews compared the proportion of 'regular shoppers' with the number of 'browsers'. For instance, it was noted that Principles for Men had the lowest ratio of 'regular customers' to 'browsers' and Top Man and Next for Men had the highest (Table 4.6). Retailers analyse the conversion rate, which is the ratio of customers who purchase on their visits, to browsers. Staffing levels are allocated, based on sales transactions and sales turnover, not on how many customers may be in the store. If there is a low conversion rate, customers may fail to get the service they expect or require and, hence, leave empty handed. A low ratio of 'regular customers' to 'browsers' may indicate a low conversion rate and could be investigated by the retailer. Burton Menswear is the only retailer included in the survey that purely sells menswear and boyswear, in contrast to the other four retailers, which sell ladieswear as the predominant department. When comparing the percentage of regular customers to browsers, these four retailers would accordingly be expected to have a higher proportion of customers leaving the store without having purchased menswear merchandise.

It is advantageous for retailers to know from which other outlets their regular customers purchase to enable identification of main competitors. It is also essential to identify where browsers actually make their purchases, since these are the potential customers who visit the store but leave without purchasing. Findings indicate that half of the 671 respondents shop with Burton Menswear, Top Man, River Island and Next for Men, but only a quarter of all respondents shop at Principles for Men (Table 6.1). These results are important because they confirm that most consumers visit more than one store and are aware of retailers offers before making the purchasing decision. Burton Menswear would have been expected to have the highest number of customers, based on market share, and consequently results may be an indication of their falling market share.

Table 6.1 Purchase behaviour of all respondents

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Customers	329 (49%)	185 (28%)	288 (43%)	331 (49%)	353 (53%)
Non – Customers	342 (51%)	486 (72%)	383 (57%)	340 (51%)	318 (47%)

n = 671

6.3.2 Competitor analysis

The empirical findings demonstrate that most people shopping for fashion clothing will visit several shops and are aware of products and prices (Table 6.2). The results, for these five retailers in Glasgow, indicate the extent to which they are in direct competition. For example, Burton Menswear regular customers also shop in Top Man, followed by River Island and Next for Men. In contrast, few Burton Menswear customers shop in Principles for Men. Customers leaving Principles stated they also used Next for Men, Burton Menswear and River Island respectively. The main competitors to Top Man are River Island and Burton Menswear. River Island's main rival is Next for Men and visa versa.

Table 6.2 Competitor analysis by regular customers

Regular customers at Burton Menswear also shop at:

Respondents	Principles for Men	Top Man	River Island	*Next for Men*
Number	19	41	40	39
Percentage	21%	45%	44%	43%

n = 91

Regular customers at Principles for Men also shop at:

Respondents	Burton Menswear	Top Man	River Island	Next for Men
Number	41	21	39	42
Percentage	59%	30%	57%	61%

n = 69

Regular customers at Top Man also shop at:

Respondents	Burton Menswear	Principles for Men	River Island	Next for Men
Number	53	16	55	41
Percentage	50%	15%	52%	39%

n = 105

Regular customers at River Island also shop at:

Respondents	Burton Menswear	Principles for Men	Top Man	Next for Men
Number	37	24	30	46
Percentage	42%	27%	34%	52%

n = 88

Regular customers at Next for Men also shop at:

Respondents	Burton Menswear	Principles for Men	Top Man	River Island
Number	34	30	33	49
Percentage	32%	28%	31%	46%

n = 107

Analysis of where the browsers normally purchase may indicate where these retailers might expand their customer group (Table 6.3). Results testify that most of the browsers at Burton Menswear and Top Man mainly shop in Next for Men; browsers at Principles for Men shop predominantly in Next for Men and River Island, whereas River Island browsers would normally be loyal customers at Burton Menswear, Next for Men browsers would shop at River Island. These analyses are based on low numbers and thus can only be an indicator for further investigation.

Table 6.3 Competitor analysis by browsers

Browsers at Burton Menswear shop at:

Respondents	Principles for Men	Top Man	River Island	Next for Men
Percentage	21%	26%	32%	50%

n = 38

Browsers at Principles for Men shop at:

Respondents	Burton Menswear	Top Man	River Island	Next for Men
Percentage	35%	32%	44%	47%

n = 57

Browsers at Top Man shop at:

Respondents	Burton Menswear	Principles for Men	River Island	Next for Men
Percentage	39%	25%	33%	53%

n = 35

Browsers at River Island shop at:

Respondents	Burton Menswear	Principles for Men	Top Man	Next for Men
Percentage	48%	15%	35%	28%

n = 47

Browsers at Next for Men shop at:

Respondents	Burton Menswear	Principles for Men	Top Man	River Island
Percentage	37%	11%	46%	31%

n = 34

6.3.3 Direct measure of intention to purchase

All respondents were asked the uni-dimensional measure of the likelihood of purchasing from the store they were evaluating within the next six months. Results were analysed for regular customers and total sample, which included the browsers. The question was interpreted using a scalar response with 1 indicating a 'Very unlikely' and 7 indicating a 'Very likely' intent to purchase again within the next six months. Next for Men attained the highest mean value and River Island the lowest for regular customer future purchase intentions (Table 6.4). Principles for Men averaged the lowest mean from all respondents and an ANOVA test indicated that there was a significant difference in future purchase intentions between the five retailers (df = 4; F = 4.45; sig. = .0015).

Table 6.4 Regular customers and all respondents future purchase intention

	Burton Menswear		**Principles for Men**		**Top Man**		**River Island**		**Next for Men**	
	Reg. Cus.	**All Resp.**	**Reg. Cus.**	**All Resp.**	**Reg. Cus.**	**All Resp.**	**Reg. Cus.**	**All Resp.**	**Reg. Cus.**	**All Resp.**
N	91	129	69	126	105	140	88	135	107	141
Mean	5.10	4.33	5.16	4.18	5.13	4.59	5.08	4.60	5.54	5.04

6.3.4 Importance of store image attributes

The multi-attribute model examines the importance of store image factors to customers and allows a specific customer store image profile to be created (Ajzen and Fishbein, 1980; Doyle and Fenwick, 1974; Fishbein, 1967a; James *et al.*, 1976; Kuruvilla *et al.*, 1994). Previous research has demonstrated that retailers need to understand the relative importance of consumer beliefs to allow senior management to optimise resources. Each attribute importance for regular customers of the five retailers is analysed (Table 6.5). Moreover, results are ranked in order of importance (Table 6.6). By comparing and contrasting values between loyal customer groups, a number of notable results can be highlighted. For example, customer perception of store layout was consistently the least important factor in deciding where to shop, whereas price, which reflects value for money, was the most important attribute for all the customers. However, significant differences occurred in customer perception of the importance for staff to be knowledgeable and friendly. This factor was ranked second for Next for Men, but only rated fifth for Burton Menswear and Principles for Men. Top Man and River Island customers put high value on choice and selection of merchandise, whereas quality was less significant. This differs from the other retailers where quality of merchandise was ranked the second or third most important attribute. Selection of products was seen as fairly important to all the customers except for loyal customers at Next for Men. They may be conditioned to a slightly narrower selection. These findings confirm that specialist retailers in fashion clothing have a different order of attribute importance compared with other retail sectors (Hansen and Deutscher, 1977), however, they also indicate that individual stores have target customer groups with their own priorities.

The summarised mean values of attribute importance indicate that customers at River Island have the highest expectation of the shopping experience closely followed by customers at Next for Men in contrast to shoppers at Burton Menswear who have the lowest expectation. This might denote that loyal customers of River Island and Next for Men may be more critical of the merchandise and the shopping environment than customers at the other retailers.

Table 6.5 Importance of attributes to regular customers

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Fashion	4.35	4.71	4.79	4.65	4.61
Layout	4.14	4.35	4.24	4.38	4.50
Price	5.23	5.32	5.27	5.40	5.55
Quality	4.86	5.16	4.73	5.11	5.08
Refund	4.78	4.70	4.60	5.06	4.98
Reputation	4.35	4.77	4.48	5.01	4.97
Selection	4.95	4.96	5.05	5.26	4.77
Staff	4.65	4.74	4.92	5.16	5.12
Total	36.31	38.81	38.08	40.03	39.58

Table 6.6 Rank order of attribute importance to regular customers

Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Price	Price	Price	Price	Price
Selection	Quality	Selection	Selection	Staff
Quality	Selection	Staff	Staff	Quality
Refund	Reputation	Fashion	Quality	Refund
Staff	Staff	Quality	Refund	Reputation
Fashion	Fashion	Refund	Reputation	Selection
Reputation	Refund	Reputation	Fashion	Fashion
Layout	Layout	Layout	Layout	Layout

Analysis of the 671 responses in the second phase of the investigation shows price to be the most important factor for shoppers at specialist multiple menswear retailers with selection and quality also being significant influencing factors. Service provided by staff is more important at this type of retailer than intimated by respondents in the exploratory stage, whereas fashion and style of the product was less important to most shoppers except for customers at Top Man who use fashion and style as key indicators in store choice. Comparisons of attribute importance for the exploratory phase and phase two are presented in Table 6.7.

Table 6.7 Comparison of importance of attributes in phase one and two

Phase One			Phase Two	
Attributes	**Frequency in percentage for all responses**	**Mean value for all respondents**	**Attributes**	**Mean Value for all Regular Customers**
Price	90.1	2.20	Price	5.32
Quality	72.6	2.00	Selection	4.95
Staff	72.0	3.66	Quality	4.93
Selection	47.5	2.75	Staff	4.92
Layout	46.6	4.09	Refund	4.85
Fashion	38.5	2.22	Reputation	4.67
Location/parking	23.0	4.57	Fashion	4.49
Atmosphere	21.0	4.61	Layout	4.27
Reputation	6.7	3.65		
Refund	5.8	3.45		

n = 343 n = 671

An examination of attribute importance highlighted variances between different customer groups (Table 6.8). These customer groups were defined based on the three variables of gender, age group and occupation. The store image dimension of fashion and style was of high importance to younger customers and decreased in relation to age, in contrast to store layout, which became increasingly significant to older customers. There was no major difference between customer groups with regards to the price of garments since all groups felt this dimension to be of high significance. However, quality was perceived to be of more value to female customers than male and the significance of purchasing quality clothes increased with social-economic class. Having a good refund policy was of more importance to female customers than male and this increased with age. The reputation of the company was valued more by the higher social-economic classes A and B and declined with the unemployed finding it of less consequence. The selection of clothes was equally important to all customer groups, however, service provided by staff was again regarded as more essential to female customers than male and became increasingly significant with the age of the customer.

Table 6.8 Attribute importance variance between customer groups

	Gender		Age		Occupation	
	F	Sig.	F	Sig.	F	Sig.
Fashion	-	-	6.00	.0005	-	-
Layout	-	-	2.97	.0317	-	-
Price	-	-	-	-	-	-
Quality	4.75	.0297	-	-	2.46	.0129
Refund	6.85	.0092	8.19	.0000	-	-
Reputation	-	-	-	-	2.46	.0129
Selection	-	-	-	-	-	-
Staff	4.33	.0380	3.94	.0085	-	-

All retailers use strategies to retain or increase their loyal customer base often by questioning customers and by identifying their specific characteristics or needs (Osman, 1993). Hence, differences between regular customers for each of the retailers are of great importance, as are trends in customer expectation. By investing in market research, to identify consumer expectation and to measure customer satisfaction, retailers can target loyal customers by providing tailored products and services to specific customer groups to increase satisfaction. All attribute dimensions were analysed for correlation, to determine the strength of association between different variables. It was judged that there was no serious overlap in attribute dimensions as the highest correlation for any of the variables was between quality and fashion (R^2 = .45; sig. = .0000) and that this coefficient was low enough to be acceptable for the two variables to remain separate (Jankowicz, 1995).

6.3.5 Store evaluation on store image attributes

Regular customers evaluated each retailer on the eight store image factors and mean values were calculated for each attribute dimension (Table 6.9). Holistic store evaluations for browsers are presented for comparison purposes (Table 6.10). Data indicate regular customer evaluation of the product provision and the sales environment in holistic terms, which is compared with that of the competition. Furthermore, findings demonstrate differences between the perception of regular customers and those of browsers. Next for Men is the company where variance between the two groups is lowest. Burton Menswear and Top Man obtain very low store image evaluation from browsers which could mean that the retailers have less opportunity to increase sales from these consumers.

Table 6.9 Store attribute evaluation from regular customers

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Fashion	1.32	1.72	1.83	1.84	1.79
Layout	1.29	1.38	1.10	1.66	1.47
Price	1.43	1.25	1.47	1.20	1.34
Quality	1.67	1.78	1.46	1.78	1.87
Refund	1.43	1.19	.97	1.43	1.66
Reputation	1.45	1.57	1.66	1.89	1.90
Selection	1.33	1.67	1.54	1.64	1.41
Staff	1.27	1.14	1.11	.98	1.52
Total	10.95	11.70	11.13	12.42	12.96

Table 6.10 Total store attribute evaluation from browsers

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Total	.83	4.81	2.74	7.89	9.88

6.3.6 Variance between retailers

Regular customer evaluation of retailers are presented in Table 6.11. When the two rankings are compared, that is customer belief of how important each attribute is against the consumer evaluation of the store on the same attributes (Tables 6.6 and 6.11) results indicate how successful the retailer is in prioritising the factors important to customers. Burton Menswear customers are most satisfied with the quality of merchandise, company reputation and the price of merchandise, but are less happy with product selection and staff interactions which are both deemed important. Customer evaluation of service provided by staff is a problem to all the retailers, with Principles for Men, Top Man and River Island all obtaining particularly low evaluation. Three companies, Principles for Men, River Island and Next for Men are also perceived as charging higher than average prices for merchandise.

Table 6.11 Rank order of mean valence values from regular customers

Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Quality	Quality	Fashion	Reputation	Reputation
Reputation	Fashion	Reputation	Fashion	Quality
Price	Selection	Selection	Quality	Fashion
Refund	Reputation	Price	Layout	Refund
Selection	Layout	Quality	Selection	Staff
Fashion	Price	Staff	Refund	Layout
Layout	Refund	Layout	Price	Selection
Staff	Staff	Refund	Staff	Price

Comparisons of importance ranking and store evaluation also indicate that Top Man and Principles for Men have a problem in dealing with refunds. As most fashion retailers now have very similar refund and exchange policies, this may refer to local difficulties and not necessarily be a countrywide phenomenon. When stores have trouble in achieving sales targets staff are inclined to be less enthusiastic in offering customers their money back.

Retailers could prioritise the most important attributes, as perceived by the customer, and try to increase satisfaction in these areas. By way of illustration, customers at Burton Menswear intimated that price, selection of merchandise and merchandise quality were the three most important attributes; however, store evaluation for these priorities attributes were ranked third, fifth and first respectively. This would identify that the attribute, merchandise selection, can be identified as being a problem based on store image rankings.

In contrast, customers at Next for Men perceived price, friendly and knowledgeable staff and merchandise quality to be of high importance, but only one of these attributes, quality of merchandise, was ranked in the top three. The attributes of price and service were both ranked in the lower half. This could suggest that perception of the store, in terms of price and staffing, are out of step with customer expectation and may present a strong case for either reviewing pricing policies or, alternatively, communicating the intended price position more effectively and examining staff training programmes.

Several of the companies state in their Annual Reports that staff are an asset to the company, but customer feedback from this survey suggest that retail sales staff are not regarded as particularly friendly or knowledgeable. Although this issue is more important to some customers than others, customer service is one way that fashion retailers can differentiate themselves from their main competitors. Many retailers now invest in customer service training programmes (Beatty *et al.,* 1996), measure staff attitudes to evaluate motivation and provide performance related pay systems based not only on sales turnover but also customer service satisfaction (Richer, 1996). From the analysis, all the retailers, other than Next for Men, appear to need to review existing customer service training programmes.

Another method available to judge the success of each retailer in satisfying the needs of their customers, as well as comparing the rank of attribute importance and actual evaluation of store image variables, is by considering mean values. For example, it appears that satisfaction with merchandise quality in Burton Menswear (1.67) is not perceived to be as good as that at Next for Men (1.87) although quality was the variable at Burton Menswear with which customers were most satisfied.

Principles for Men score highly on quality (1.78) and fashion (1.72), although the latter was not perceived to be very important; Top Man fare well on fashion (1.83), reputation (1.66) and selection (1.54) and River Island on reputation (1.89), fashion (1.84) and quality (1.78). Next for Men, which attained the highest overall scores, did well on company reputation (1.90), quality of merchandise (1.87) and fashion and style (1.79). Results for this retailer are the highest for the four attributes of reputation, quality, refund (1.66) and staff (1.52) and second highest for store layout (1.47) when compared with the other four companies. The categories on which Next for Men came first were all factors perceived by customers to be highly important. The main problem for this retailer is to convince target customers that it is worth paying extra for the style and the quality of merchandise and that goods are providing value for money.

6.3.7 Measure of attitude towards retailers store image

Attitude towards retail image is calculated by multiplying the importance value for each attribute with store evaluation. Overall perception towards store image is measured by summing individual attitude measurements (Ajzen and Fishbein, 1980; Doyle and Fenwick, 1974). Store image values for regular customers (A); browsers (B); and respondents (C) can be compared (Table 6.12). An analysis of variance between the five groups of consumers (Table 6.12 - C) indicates that store image evaluations for the five retailers are different and highly significant (df = 4; F = 8.07; sig. = .0000).

Table 6.12 Attitude to store image

A) Regular customers attitude

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Fashion	6.24	8.30	8.78	8.73	8.75
Layout	5.84	6.10	4.95	7.47	7.42
Price	7.63	6.75	7.96	6.82	7.54
Quality	8.61	9.62	7.09	9.34	9.59
Refund	7.31	5.83	4.87	7.58	8.69
Reputation	6.46	7.52	7.48	9.65	9.71
Selection	7.02	8.25	7.75	8.74	7.22
Staff	5.94	5.74	5.90	5.47	8.27
Total	55.08	58.12	54.78	63.78	67.20
	n = 91	n = 69	n = 105	n = 88	n = 107

B) Browsers attitude to store image

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Attitude	10.21	22.33	13.17	38.91	48.16
Variance between A and B	81.46%	61.57%	75.96%	38.99%	28.33%
	n = 38	n = 57	n = 35	n = 46	n = 32

C) Consumer attitude to store image (total sample)

	Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Attitude	41.86	41.93	44.38	55.25	62.81

n = 671

Next for Men achieves the highest mean value for overall store image from regular customers (67.20) and also the best evaluation by all respondents (62.81). This compares favourably with Top Man, which had the weakest image when evaluated by their own customers (54.78) and Burton Menswear, which had the least agreeable image (41.86) of all five retailers based on the total sample. Respondents at Burton Menswear, followed by Top Man and Principles for Men recorded the largest variance between regular customer and browser perception. In contrast, both River Island and Next for Men have less variance between regular customer and browser observations.

It is advantageous to rank store image attributes (Table 6.13) to indicate which variables have the most positive customer evaluation to identify which factors require attention. For example, the best appraisal for Top Man was for merchandise fashion and style and their worst image dimension evaluations were for refund policy, store layout and staff service. Customers of River Island and Next for Men rate their reputation highly, which may be a reflection of a stable positioning strategy by these two companies in contrast to Burton Menswear, Principles for Men and Top Man, all of which have been repositioned recently. The variables achieving the lowest evaluation may be areas requiring attention, particularly if these are variables important to targeted customers.

Table 6.13 Rank order of regular customers mean attitude values

Burton Menswear	Principles for Men	Top Man	River Island	Next for Men
Quality	Quality	Fashion	Reputation	Reputation
Price	Fashion	Price	Quality	Quality
Refund	Selection	Selection	Selection	Fashion
Selection	Reputation	Reputation	Fashion	Refund
Reputation	Price	Quality	Refund	Staff
Fashion	Layout	Staff	Layout	Price
Staff	Refund	Layout	Price	Layout
Layout	Staff	Refund	Staff	Selection

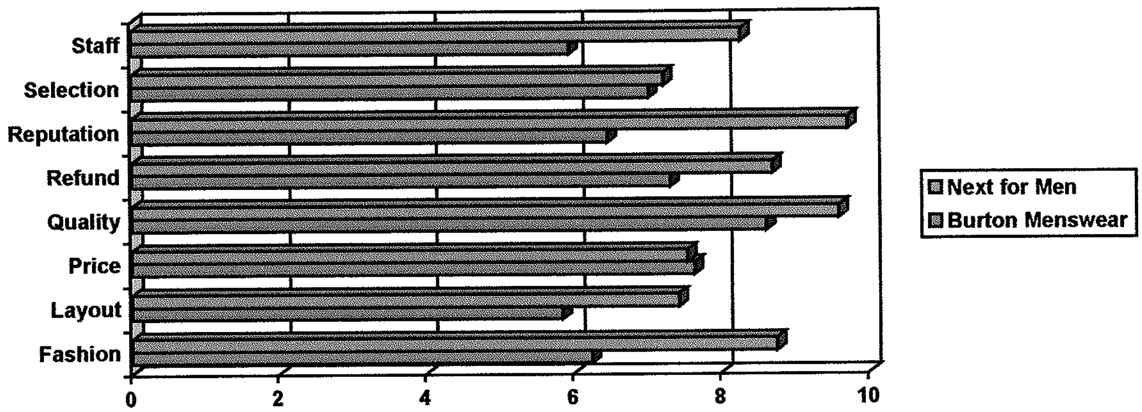
The uni-dimensional measure of future intentions to purchase can be correlated with the overall image attitude measurement. The outcome identifies the correlation coefficient to be .634 ($p<.000$), which compares favourably with James *et al.,* (1976) results of .513 ($p<.001$). Consequently, more than 40 per cent of the uni-dimensional measure of intent to purchase is explained by the attribute dimensions included in the overall attitude measurement. This is within the range of previous image results (Bass and Wilkie, 1973) and confirms the multi-attribute model as an effective market research tool for store choice.

6.4 Stage Two: Retail Employee Survey

Competition in fashion retailing is intense, with image holding a central role. Thus, it is important that retailer resources are invested carefully to maximise customer satisfaction and increase customer loyalty. Store image congruence, between employee and customer perception, is important as it is can provide a quick feedback mechanism for management on trading strategy. Congruence theory suggests that companies, which have successfully built long-term customer relationships, identify retail managers and customers to have fairly similar image perceptions (Osman, 1993), and that significant difference between cognition may be an indicator of vulnerability (Samli and Lincoln, 1989). Hence, the next stage of this study examines how front line staff, in two of these retail companies, perceive the image of the company they work for. From these findings, comparisons can be made between regular customers and retail employee perceptions.

The methodology justified how Burton Menswear and Next for Men came to be selected for this next stage of the study since they registered the highest and the lowest overall attitude measure, based on the evaluation from all respondents (Figure 6.1). Consequently, in this stage of the research, staff and management perception of store image are compared with consumer perception, and congruence and discrepancies evaluated.

Figure 6.1 Customer attitude measurements for Burton Menswear and Next for Men



6.4.1 Competitor analysis by retail employees

Employees from both retailers were first asked, which companies they perceived to be their main competitors (Table 6.14). Staff at Burton Menswear view River Island as the main rival of the five companies surveyed with Next for Men in second place. The consumer surveys indicated Top Man also to be a strong competitor.

Table 6.14 Retail employees perception of main competitors, in percentages

	Burton Menswear Employees	Next for Men Employees
Burton Menswear	*	27%
Principles for Men	19%	65%
Top Man	41%	18%
River Island	81%	71%
Next for Men	67%	*
Marks & Spencer	37%	70%
Slaters Menswear	11%	14%
Debenhams	0%	11%
BhS	19%	0%
Reiss	0%	11%
	n = 28	n = 56

Staff at Next for Men agreed with regular customers, that River Island was one of the main competitors, but also perceived Marks & Spencer as a direct rival. Browsers at Next for Men mainly shopped at Top Man and Burton Menswear, but these were not perceived to be strong contestants. Staff also perceived Principles for Men as a close competitor, but this was not confirmed by the consumer survey, which indicated that both Burton Menswear and Top Man were in a stronger competitive position than Principles for Men. Retailers are aware that consumers are increasingly transient when shopping for fashionable clothing (McGoldrick and Andre, 1997) and thus companies need to ensure strategies achieve optimum customer satisfaction.

6.4.2 Measure of direct intentions to purchase

Retail employees were asked to assess their purchase intention from the outlet had they not been employed by the company. Results present the prospect that staff at Burton Menswear are less interested, in purchasing merchandise from their own store, than are staff at Next for Men (Table 6.15). Many fashion retailers attract staff who would like to purchase merchandise for themselves or their families. A generous staff discount is one of the most highly rated benefits (Rothery, 1997) consequently, staff try to get employment where this benefit is of most use.

A comparison of regular customer and staff purchase intention shows that employees at Next for Men have similar propensity to purchase as regular customers (Tables 6.15 and 6.4). However, there is a significant difference between regular customer and staff intention to purchase at Burton Menswear and management should identify why this is so. Findings indicate that initially employees have an above average intention to purchase goods, but this intention declines over a period of six months. Burton Menswear staff, with six months to three years length of employment, appear to have a lower than average intention to purchase and only those staff, who have been with the company longer than three years, increase their purchase intention. In both companies, management had a higher intention to purchase than sales staff. An ANOVA test indicated a high significant difference between the purchase intention of employees in the two companies (d.f = 1; F = 26.1; Sig. = .0000). Thus, the measure of staff intention to purchase could be a surrogate indicator for senior management of customer purchase intention. In fact, some retailers already use the propensity of staff to order from new season ranges as a method of indicating likely best sellers.

Table 6.15 Direct measure of future purchase intention by retail staff

Employee segments	Burton Menswear n = 28	Next for Men n = 55
All management	4.50	6.20
All staff	3.54	5.31
Management and staff - < 6 months employment	3.80	6.40
Management and staff - > 6 months < 1 year employment	3.20	5.14
Management and staff - > 1 year < 3 years employment	2.33	5.43
Management and staff - > 3 years employment	4.33	5.41
All employees	3.61	5.47

6.4.3 Attitude towards store image by retail employees

Retail employee perception of attribute importance and evaluation of their own store on these same attributes are presented in Table 6.16. Overall attitude is calculated as previously and an analysis of variance is shown for each attribute. The greatest difference between the two companies is in the staff perception of the fashion and style of merchandise (F = 23.57; Sig. = .0000). Employees at both retailers rate this with similar importance, but front line staff at Burton Menswear rate their company products very badly. The second most important difference between employees at the two companies is in the perception of the selection of merchandise with Burton Menswear being rated lower than Next for Men for both attribute importance and store evaluation (F = 13.15; Sig. =

.0005). Other significant variances are company reputation (F = 8.72; Sig. = .0041) and merchandise quality (F = 4.46; Sig. = .0378). Furthermore, difference in staff perception of price points is very nearly significant (F = 3.95; Sig. = .0505).

Table 6.16 Retail employee perception of store image

Attributes	Burton Menswear			Next for Men			Attitude - Analysis of Variance	
	Attribute Importance	Store Evaluation	Attitude to Store Image	Attribute Importance	Store Evaluation	Attitude to Store Image	F	Sig.
Fashion	4.32	.50	2.18	4.32	1.79	7.98	23.57	.0000
Layout	4.82	1.29	6.47	4.75	1.63	7.96	*	*
Price	5.00	1.64	8.50	5.43	2.04	11.34	3.94	.0505
Quality	4.96	1.43	7.29	5.29	1.86	10.09	4.46	.0378
Refund	5.32	2.50	13.32	5.54	2.61	14.59	*	*
Reputation	4.64	1.21	5.96	4.95	2.05	10.11	8.72	.0041
Selection	4.89	1.04	4.68	5.46	1.84	10.09	13.15	.0005
Staff	5.39	2.11	11.32	5.52	2.27	12.50	*	*
Total		11.71	59.71		16.07	84.66	11.32	.0012

n = 28 n = 56

Note: * Not significant

Overall employee attitude can be broken down into segments based on status and length of employment (Table 6.17). Similarly to findings on purchase intention, managers have an image perception that is more favourable than the staff or customers. After initial engagement, employee image perception tends to decline but those with more than three years service have a halo perception of the store and its provisions. However, it must be taken into account that only a small number of employees are included in the survey and a cross sample from all stores across the country should be made for results to be valid.

The qualitative section of the employee survey highlighted some interesting views. The target customer at Burton Menswear was perceived to be 'men who haven't enough money for really good shops'; aged between 20 and 50; mostly family men 'who want stylish but not high fashion clothes at competitive prices'. In contrast staff at Next for Men believed that their company appealed to the 'smart business man and students with money' as well as the 'young fashion conscious office worker'. There was general agreement that the age group for casual wear was approximately 18 to 35, but men wanting formal wear could be up to 55 years of age.

Table 6.17 Store image attitude perception by retail staff

Employee segments	Burton Menswear		Next for Men	
	n	Mean	n	Mean
All management	2	81.50	11	99.18
All staff	26	58.04	45	81.11
Management and staff - < 6 months employment	5	62.60	5	86.60
Management and staff - > 6 months < 1 year employment	5	55.40	7	89.86
Management and staff - > 1 year < 3 years employment	6	39.67	14	81.93
Management and staff - > 3 years employment	12	70.33	30	84.40
All employees	28	59.71	56	84.66

The store image of Burton Menswear was described as reliable, very bland and middle of the road with aspirations of being like Next and providing customer service comparable with that of Marks & Spencer. Staff from Next for Men perceived their store environment as being stylish, classy and simple whilst the store provided good quality classic and fashionable clothing supported by excellent customer service. Staff at Next thought prices were reasonable and that goods provided good value for money. Moreover, they felt that stores had a strong brand image and an exclusive feel which was unmatched on the high-street.

Store managers were asked for additional information, which was provided by those at Next for Men but was declined by Burton Menswear managers. At Next managers thought the working environment was 'friendly, pleasant, relaxed and professional' and that 'team morale was excellent and all employees knew exactly the role they play'. They believed that the company differentiates itself from the competition in a number of ways, such as by 'innovative design and fabrics'; 'offering excellent quality, fashionable clothing at ... prices unmatched anywhere on the high street'; and by the way stores are merchandised 'only displaying a few items to give the product that exclusive feel'; and 'by offering excellent customer service from well trained knowledgeable sales consultants'. Furthermore, managers at Next thought that staff promoted the image of the stores by the way that they were trained. 'Staff must be professional and competent in all aspects and each person is given individual training by a sponsor. This training is ongoing throughout their time in Next'. All the Next managers mentioned the importance of ongoing staff training in product knowledge and customer service.

6.4.4 Congruence of store image

Although it is important to note differences in employee perception of their own companies the main reason for measuring employee attitudes was to compare them with customer perception. The initial analyses of staff perception appear to confirm previous studies in showing that employees see the store in a less critical light than do regular customers (Table 6.18).

Table 6.18 Congruence of regular customer and retail employee perception

	Burton Menswear				Next for Men			
	Regular Customer Attitude	Employee Attitude	Variance Absolute and Percentage		Regular Customer Attitude	Employee Attitude	Variance Absolute and Percentage	
Fashion	6.24	2.18	-4.06	-65%	8.75	7.98	- 0.77	- 9%
Layout	5.84	6.47	0.63	11%	7.42	7.96	0.54	7%
Price	7.63	8.50	0.87	11%	7.54	11.34	3.80	50%
Quality	8.61	7.29	-1.32	-15%	9.59	10.09	0.50	5%
Refund	7.31	13.32	6.01	82%	8.69	14.59	5.90	68%
Reputation	6.46	5.96	-0.50	- 8%	9.71	10.11	0.40	4%
Selection	7.02	4.68	-2.34	-33%	7.22	10.09	2.87	40%
Staff	5.94	11.32	5.38	91%	8.27	12.50	4.23	51%
Total	55.08	59.71	4.63	8%	67.20	84.66	17.46	26%

Figure 6.2 and Figure 6.3 illustrate this point with results of each attribute dimension for Burton Menswear and Next for Men. Overall, staff have an image perception that is more positive than the customer, but when individual dimensions are examined differences can be identified. This is especially so at Next for Men where staff perception of refund provision, service provided by staff and price points are particularly positive. The only attribute that staff evaluate slightly below that of regular customers is merchandise fashion and style. In contrast, Burton Menswear staff are more critical of merchandise fashion and style, selection of merchandise, merchandise quality and company reputation than customers.

Figure 6.2 Store image congruence for customers and employees at Burton Menswear

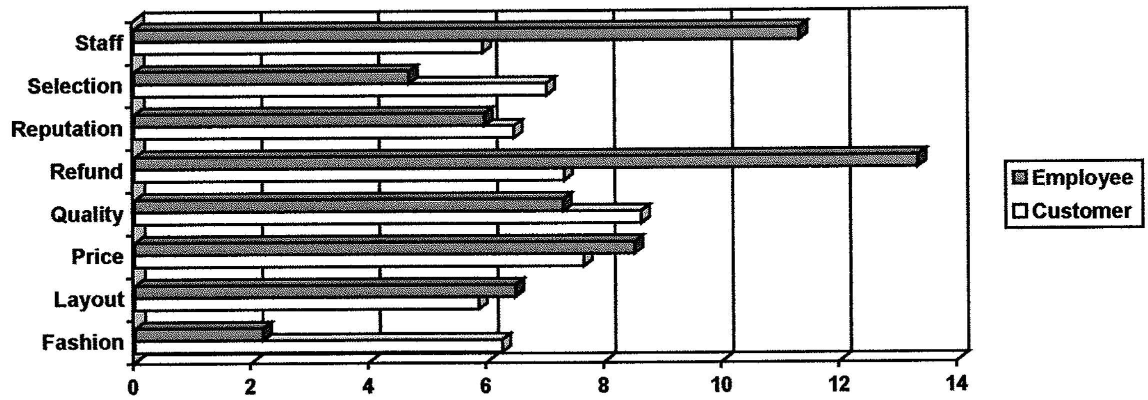
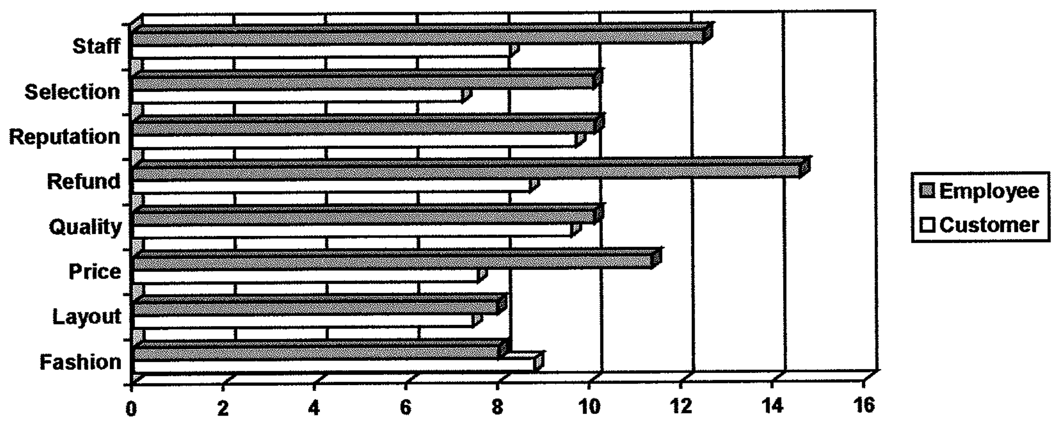


Figure 6.3 Store image congruence for customers and employees at Next for Men



Clearly, employees in both companies see their service provision in a more positive light than do their customers, but staff at Burton Menswear appear to have a very inflated view of their efficacy. This high perception of their own service provision and the way they implement the company refund and exchange policy means that they have an overall image perception of their own store that is more favourable than that of customers. Based on merchandise factors alone the image perception by staff at Burton Menswear would have been negative when compared with that of customers (-16 per cent). At Next for Men staff still have a favourable image of their company and their store (+ 15 per cent) even if the two variables are excluded. It is worrying to see a company, positioned in the mainstream fashion clothing sector, whose employees hold the product range in such low esteem, when customer service provisions and staff interaction with customers can be a real differentiator (Beatty *et al.,* 1996; McGoldrick and Andre, 1997). These findings, therefore, confirm Osman's (1993) conclusions that measurement of the congruity gap (where it exists) can offer valuable feedback to management on marketing strategies.

6.5 Conclusion

Store image is important to retailers, as it represents their most significant method of communication with targeted customers. This chapter identified store choice for menswear fashion consumers and concluded that most shoppers would purchase from a variety of outlets, even if they were particularly loyal to one. The chapter also evaluated the variability in the mix of attributes customers felt important when deciding where to purchase. The precise 'mix' of attributes appeared to be dependent on the retail sector, target market and motivation of the consumer, with the combination of image attributes being more important than each factor taken in isolation. The study of menswear fashion retailing evaluated the attributes important in this single retail sector - not only relative to each other, but also between retailers. In so doing, findings confirm that - in this sector at least - there appear to be significant differences in the composition and importance of attributes of store image between retailers with similar market positioning. The data analysis was based on Fishbein's (1967) multi-attribute model, which is recommended for use in the field of consumer behaviour (Doyle and Fenwick, 1974; Schiffman and Kanuk, 1994).

The measurement of attitude towards store image demonstrated that there is significant difference between stores, as perceived by their regular customers. However, browser perception was less favourable than customer perception for all the retailers in the study. An understanding of how companies might improve the retail mix stems from evaluation of consumer attitude towards store image, hence a number of recommendations are suggested for the retailers in the study. Whilst not the principal focus for the study, the results do appear to indicate a relationship between overall store image perception and financial performance. This is suggestive of a link between image, store loyalty and performance which clearly deserves further attention.

Customer feedback from this survey would suggest that retail sales staff are not regarded as particularly knowledgeable or friendly and that service provisions do not measure up to expectations. This detailed information is valuable for marketing practitioners to understand how regular customers perceive their 'product' offering in a holistic sense, compared with that of the competition, and to help them decide how to manage the retail marketing mix.

This chapter also studied the store image perception of front line staff in two of the companies and results generally confirm previous findings. Nevertheless, it is suggested that for a company to be successful in the fashion sector, front line staff must have a high regard for the store, its products and the environment in which they work, lest they fail to transmit the positive image sought by their customers. The disposition of staff to buy their own store fashion merchandise appears, from these findings, to be a good measure of consumer reaction to the product and could be a good indicator of best sellers. If staff do not show an inclination to buy the merchandise it means, for a fashion store at least, that there may be a problem with the range of goods demanding investigation. One practical upshot of this chapter is that it has underlined the need for retail management to ensure that staff perception of the store image is more positive than the views of their customers. By confronting this issue, it is hoped that retailers can maintain and enhance the differentiation from their competitors more effectively.

The next phase of the research will explore how consumers 'trade off' store choice attributes between individual retailers. By doing this, it is anticipated that deeper insights will be provided into the relationship between store positioning, store image and segmented customer groups, and thus shed light on important issues pertinent to the management of store image by retail companies.

CHAPTER SEVEN

PHASE THREE: CONJOINT ANALYSES

7.1 Introduction

The purpose of this chapter is to examine the principle dimensions involved in store choice decisions and to discuss the trade-offs consumers make in their judgements between salient variables. The main elements of store image, market positioning and customer segmentation have been considered previously and it has been recognised that few studies have attempted to evaluate consumer trade-offs on salient store image variables in fashion retailing. Conjoint analysis has been used to measure market positioning for US department stores (Amirani and Gates, 1993; Louviere and Johnson, 1990) and to analyse European food and fashion retailer perceptions of their own store image and competitive positioning (Oppenwal and Timmermans, 1995). Thus, this phase of the research utilised this technique to examine how consumers choose where to purchase fashion clothing based on their perception and trade-offs of four salient attributes: price, merchandise selection, staff service and merchandise quality. These were identified as the four most frequently cited attribute dimensions in the exploratory phase of the study (Table 5.1) and were perceived by customers to be the four most important attributes in the second phase (Table 6.7). Two menswear retailers, Burton Menswear and Next for Men were used for the investigation and 244 respondents were interviewed to elicit the preferred 'bundle' of attributes they felt influenced store choice.

First, the chapter examines how the technique of conjoint analysis can make a contribution towards retailer understanding of store choice. Secondly, the results of the conjoint analysis are discussed for each company. An attempt is made to evaluate the trade-offs involved in the choice process and the implications for competitive positioning are examined for each retailer based on different needs, identified in six sub-segments. The chapter concludes by comparing and contrasting the market segmentation for the two retailers.

7.2 Conjoint Analysis

When consumers intend to purchase, they are inclined to make comparisons between alternative brands or stores and the advantages and disadvantages they think are involved in making the purchase decision (Chisnall, 1997). The extent to which evaluations take place depends on the type of product, whether the decision is high or low involvement and the ramifications of purchasing the wrong product.

Conjoint analysis is a technique used to measure consumer preferences and to establish the relative importance of different attributes. It was used originally by market researchers to identify and understand how the demand for commodity products is influenced by certain factors and which combinations of factors would maximise sales (Wriens, 1994). Some of these might be tangible product attributes while others could be augmenting factors such as after sales service, warranty, etc. (Kotler *et al.*, 1996).

It is assumed that the product or brand is decomposed into a number of attributes important to the consumer. In conjoint studies these attributes are normally called features. Conjoint analysis provides a quantitative approximation (known as the 'utility') of how each feature affects the decision, as well as showing the relative contribution, in percentage terms, of each feature to the overall decision process ('relative importance') (Bretton-Clark, 1992). When conducting the conjoint analysis, the utility of the concept is assumed to be equal to the sum of utilities for each feature (Bretton-Clark, 1993). Respondents are presented with the profile cards, as discussed in the methodology, and the results are analysed using a part-worth model appropriate for categorical or qualitative features. A cluster analysis was carried out to segment customers into homogenous groups. Clusters were identified for both companies to a level where customer preferred product combination was different, but still worth investigating, and distances in clusters were similar.

7.3 Conjoint Analysis for Burton Menswear

7.3.1 Data validity

The first stage of analysis investigated the data validity. The fit for respondent evaluations was quite high with the average correlation for Burton Menswear resulting in an Adjusted R^2 of 0.81 with an estimated degree of error of .004. This indicated that the model fitted the data extremely well. Furthermore, the internal validity, as measured against the holdout cards, indicated an Adjusted R^2 of 0.86 implying that the holdout cards and the twelve profile cards were completed with statistically significant internal validity. This is important, as some conjoint analyses contain a high number of profile cards, which may confuse respondents or lead to respondent fatigue and consequently lead to inconsistencies.

7.3.2 Group utility for Burton Menswear

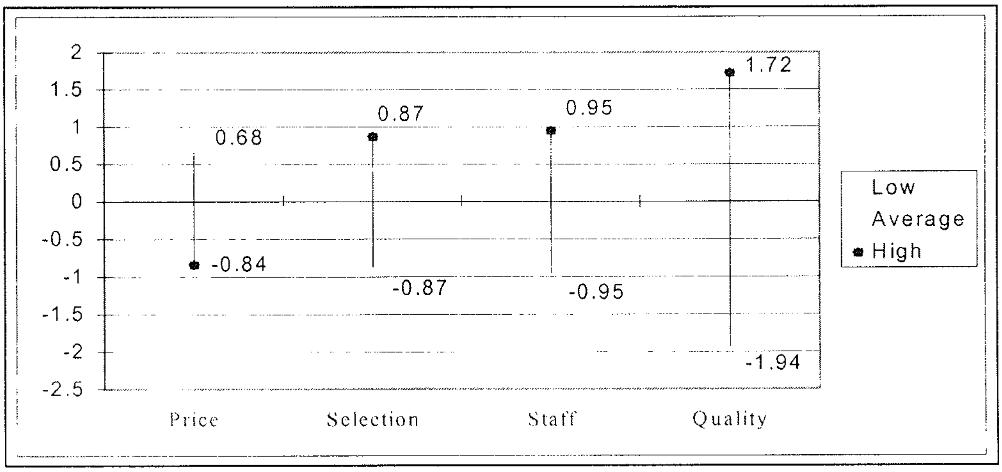
The initial analysis contains group statistics for the four selected features (Table 7.1; Figure 7.1). Although group statistics can be misleading, as individual customers within the target market would be expected to have different predisposition, an initial evaluation is made of the overall preferences of Burton Menswear customers. The group results suggest that customers make their main decision based on merchandise quality (41.50 per cent) followed by staff service (21.43 per cent); selection of merchandise (19.80 per cent) and merchandise price with the lowest relative importance (17.27 per cent).

Table 7.1 Group utility function for Burton Menswear

Feature	**Group Relative Importance**	**Utility:** ***Below Average***	**Utility:** ***Average***	**Utility:** ***Above Average***
Price	17.27%	0.68	0.16	-0.84
Merchandise selection	19.80%	-0.87	-----	0.87
Staff	21.43%	-0.95	-----	0.95
Merchandise quality	41.50%	-1.94	0.22	1.72

n = 99; Av. Adj. R^2 = 0.82

Figure 7.1 Group utility function for Burton Menswear



A stronger indication of consumer requirement is found by interpreting the utility function. It must be remembered, that the influence of each feature and level is analysed relative to the influence of all the other features and levels in the study (Bretton-Clark, 1992). Therefore, the utility score gives an indication of how much benefit the respondent group allocates to a particular feature when traded off against the other features. For example, the merchandise quality level of 'generally higher than average' gains the highest utility (1.72), and consequently is perceived to be of high benefit to the customer. On the other hand, merchandise quality, when rated 'generally average' has less utility (0.21) and quality viewed as 'generally below average' received the lowest utility score (-1.94), thus indicating that it offers little benefit to the consumer.

One constraint of the model is that utilities for each feature always sum to zero, which signifies that utility scores should be compared for all features. The percentage of customers choosing different levels, that is the respondents who had greater utility for a particular level, is presented in Table 7.2. Results suggest that 66 per cent of Burton Menswear customers seek lower than average prices compared with 24 per cent who are prepared to pay average prices and 9 per cent who will accept higher than average prices.

Table 7.2 Distribution of preferred levels for Burton Menswear customers

Feature	'Below Average' in percentages	'Average' in percentages	'Above Average' in percentages
Price	66.31	24.48	9.20
Merchandise selection	4.50	-----	95.50
Staff	3.93	-----	96.07
Merchandise quality	0	20.06	79.94

n = 99;
Note: percentages may not sum to 100 due to rounding

7.3.3 Segmentation analysis for Burton Menswear

A cluster analysis was administered to the group data since the target customer group was assumed to be heterogeneous, consisting of many individuals each with their own preferred composition of features. By segmenting the group into smaller clusters of fairly homogenous customers their preferences can be identified and decisions made whether these sub-groups can be accommodated profitably by the retailer.

Burton Menswear appears to appeal to at least six different customer sub-segments, each with their own particular requirements (Table 7.3). All the sub-groups give the highest relative importance to merchandise quality, as indicated by the group results, thus, it is the second and third feature that separate the segments as well as the strength of the utility for the preferred level of each feature.

Table 7.3 Burton Menswear customer profiles

		Group 1	**Group 2**	**Group 3**	**Group 4**	**Group 5**	**Group 6**
Descriptor		*'Service oriented'*	*'Value for money'*	*'Choice and value'*	*'Neutral'*	*'Quality and service oriented'*	*'Choice and quality conscious'*
Segment size		27%	18%	15%	14%	14%	12%
Price:							
Rel. Imp.		22%	25%	16%	18%	9%	6%
Utility:	H	-0.903	-1.007	-0.603	-0.595	-0.053	0.096
	A	0.169	0.39	0.073	0.200	-0.221	0.113
	L	0.734	0.769	0.530	0.395	0.273	-0.209
Selection:							
Rel. Imp.		15%	23%	28%	20%	7%	30%
Utility:	G	0.545	0.822	0.955	0.559	0.190	0.751
	L	-0.545	-0.822	-0.955	-0.559	-0.190	-0.751
Staff:							
Rel. Imp.		26%	9%	23%	22%	33%	17%
Utility:	B	0.951	0.309	0.782	0.616	0.865	0.440
	W	-0.951	-0.309	-0.782	-0.616	-0.865	-0.440
Quality:							
Rel. Imp.		37%	44%	33%	40%	51%	47%
Utility:	H	1.486	1.517	1.018	0.998	1.143	1.024
	A	-0.251	0.091	0.234	0.197	0.410	0.327
	L	-1.234	-1.608	-1.252	-1.195	-1.552	-1.351

n = 99;
Note: percentages may not sum to 100 due to rounding

The first two groups - the *service oriented* customers and the *value for money* shoppers - together make up nearly half the sample group and both are very quality and price conscious. Group one - just over a quarter of all the respondents - places a high relative importance and utility on staff service, in contrast to selection of merchandise, which is less important to these customers. Typical comments from customers shopping in Burton Menswear were that products were 'reasonably priced' and that the 'quality is quite good and staff are helpful'. The second group, nearly a fifth of the respondents, is customers seeking 'value for money'. These customers are even more concerned about product quality and price than the first group, and are distinguished by their high expectation of merchandise selection. They shop at Burton Menswear because they find that 'there is a good selection of clothing, with reasonable prices and quality' and that the retailer provides 'value for money'.

The third and fourth sub-groups, each representing about a sixth of the respondents, are less price sensitive. Group three - the *choice and value* shoppers - are less likely to be influenced by product quality than the rest of the respondents, but place the highest utility of all groups on merchandise selection. They noted that the shop provided 'low prices or average prices for a wide variety of good quality [merchandise]'. The *neutral shoppers*, in group four, were influenced by product quality with the other three features contributing equally towards the purchasing decision. These shoppers reasoned that they shopped in Burton Menswear because the product was of 'average quality, [and] reasonably priced'; that there was a 'fair selection' of merchandise and some added that stores could be found 'in most high streets'.

Groups five and six, totalling about a quarter of all respondents, were the least price conscious sub-groups. About fifty percent of the decision of where to purchase was based on product quality. Group five - the *quality and service oriented* customer - base their store choice on higher than average merchandise quality and staff providing above average service. This is more important to them than all the other customer segments.

These shoppers indicated that the shops provided 'reasonable and good service 'from' friendly and helpful staff with 'greatly improved stock'. One shopper also observed that the retailer provided 'comfortable shopping for my age group (36-45)'. Group six - the *choice and quality conscious* shopper - preferred to pay an average or above average price for their purchases and expected a good variety of products. They stated that their reasons for shopping at Burton Menswear was that 'there is a good selection of suits and shoes' and that the store provided 'quality garments'. This suggests that all of Burton Menswear customers look to quality first and then appraise other factors afterwards, but that sub-segments within the target customers each have their own preferences that need to be satisfied.

7.3.4 Qualitative responses from Burton Menswear customers

The majority of customers at Burton Menswear mentioned that they purchased fashion clothing from this retailer because they found prices and quality reasonable and that stores offered value for money. Selection was also a criteria mentioned by a high proportion of respondents, but only a few mentioned fashion and style of merchandise as a choice criteria. Many respondents gave similar suggestions when asked how this retailer might increase customer satisfaction. One person encapsulated this as 'quality is quite good, staff are helpful, prices are low and selection is large but [I] would like to see better quality, better designs, so clothes are more trendy'. Furthermore, many customers mentioned they would like both merchandise quality and selection to be improved. Although some respondents made positive remarks about in store service, others criticised the service provided by staff and suggested that 'staff could be more friendly and helpful; [or] more customer orientated' and that staff needed better product knowledge and should be 'prepared to phone other stores if merchandise isn't available'.

The image and layout was criticised by many respondents. They would like to see stores being 'more up to date', and find that 'the shop is mixed up, [and that it is] difficult to find things'. Others recommended that stores should have 'more attractive displays' and that the company should try to be 'more like Next with [a good] reputation'. These recommendations could provide scope for future action to be taken by the retailer to increase customer satisfaction and thereby sales and profits. Although the limitation of these observations is that comments reflected only the store most frequently used by the respondents and their most recent shopping experience and may not reflect the national picture.

The results can assist strategic marketing decisions and product positioning, and offer customer segmentation data relevant to specific targeting of customer groups. The study also highlights the advantages of understanding customer perception of store attributes in encouraging customer loyalty. From the analysis of respondent groups, it appears that Burton Menswear appeals to a cross section of consumers, who describe the stores as providing merchandise of reasonable quality, at prices that are below average. In addition, some customers feel that this retailer offers a good selection of fashion clothing and staff provide a service that is, at best, varied in quality.

The company is trying to reposition its stores to attract the mainstream consumer wanting affordable clothing. Customers appear to be satisfied with the price points but are expecting more in the way of service and garment ranges. The mainstream customers, as identified by the Arcadia Group, are not homogeneous but are made up of many different sub-segments, all with their individual requirements and needs. The inference is, that Burton Menswear could strengthen the brand by using customers suggestions. For example findings suggest that one quarter of the customers would be prepared to pay more for the product if quality was improved.

7.4 Conjoint Analysis for Next for Men

7.4.1 Data validity

The evaluation of the profile cards used the same model as the previous analysis. The fit for the respondent evaluations was high, with the average correlation resulting in a high proportion of the variance in the data being explained (Adjusted R^2 value of 0.79 with an estimated degree of error of .004). Internal validity, as measured against the holdout cards, also achieved a high Adjusted R^2 of 0.86, indicating that the twelve profile cards were rigorously administered.

7.4.2 Group utility for Next for Men

The group statistics for the four features are indicated in Table 7.4 and Figure 7.2. The group results suggest that regular customers are keenly aware of the retailer objective of high product quality (44.47 per cent) followed by selection of merchandise (20.60 per cent); and service offered by staff (20.10 per cent). However, the importance attached to price was relatively low (14.82 per cent). A stronger indication of customer requirement is found by interpreting the utility function. Thus, merchandise quality, described as 'generally higher than average', was perceived as having the highest utility (2.04), but a smaller group of customers would be satisfied with average quality with the utility score -0.10. In general terms, customers perceived selection of merchandise and staff service to offer the second highest utility, whereas price, for the customers of this particular retailer, provided the lowest utility. It is perhaps to be expected that customers prefer to pay 'lower than average prices'.

Table 7.4 Group utility functions for Next for Men

Feature	Group Relative Importance	Utility: *Below Average*	Utility: *Average*	Utility: *Above Average*
Price	14.82%	0.59	0.15	-0.74
Merchandise selection	20.60%	-0.92	-----	0.92
Staff	20.10%	-0.90	-----	0.90
Merchandise quality	44.47%	-1.94	-0.10	2.04

n = 107; Av. Adj. $R^2 = 0.79$

The results of how customer groups gain different utility from particular levels can be gleaned from Table 7.5. Surprisingly just over a half of Next for Men customers sought lower than average prices, compared with a quarter who were prepared to pay average prices, and nearly a fifth who expected to pay higher than average prices for the merchandise at this retailer. Only about ten per cent of respondents preferred a limited selection of merchandise with just over ninety per cent wanting a varied selection. Nearly all customers, ninety six per cent, expected above average service from staff. Nobody desired below average merchandise quality, but an eighth of the respondents were happy with average quality with the balance of respondents indicating that they wanted above average quality.

Figure 7.2 Group utility for Next for Men

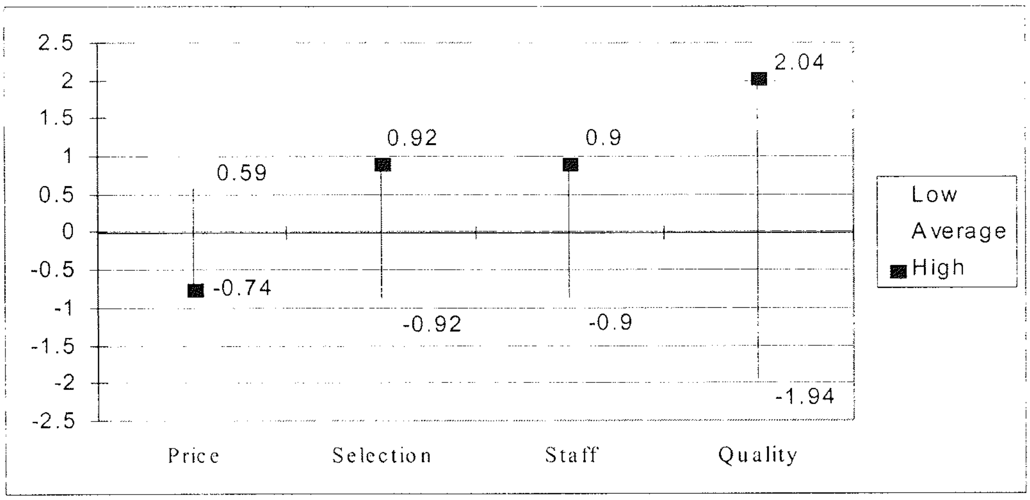


Table 7.5 Distribution in percentages of preferred levels for Next for Men customers

Feature	'Below Average' in percentages	'Average' in percentages	'Above Average' in percentages
Price	59.09	24.32	16.61
Merchandise selection	8.93	------	91.07
Staff	5.22	------	94.78
Merchandise quality	0	13.99	86.01

n = 107;
Note: percentages may not sum to 100 due to rounding.

7.4.3 Segmentation analysis for Next for Men

The second stage of the analysis explored these variations in more depth by examining the differences between coherent groups obtained from a cluster analysis procedure (Table 7.6). The results suggest that this retailer appears to appeal to at least six different customer sub-segments, each with their own particular requirements of the store. The first four groups are of similar size, each representing about one fifth of the total.

All except group five attached very high importance to merchandise quality and all segments stated product quality had a higher than average utility. Three of the groups - just under half of the respondents - gave low relative importance to price, preferring to pay average or above average prices for the goods. It is possible to attach tentative 'labels' to each of these sub-segments of Next for Men customers by interpreting the importance and utility weightings together. These interpretations can be illustrated with reference to qualitative comments gleaned from respondents.

Table 7.6 Next for Men customer profiles

	Group 1	**Group 2**	**Group 3**	**Group 4**	**Group 5**	**Group 6**
Descriptor	*'Service oriented'*	*'Value for money'*	*'Quality oriented'*	*'Selection value'*	*'Price conscious'*	*'Choice and quality conscious'*
Segment size	19%	18%	18%	18%	15%	12%
Price:						
Rel. Imp.	9%	22%	4%	18%	28%	10%
Utility: H	-0.348	-0.877	-0.025	-0.688	-1.313	0.188
A	0.134	-0.058	0.126	0.362	0.299	-0.343
L	0.214	0.935	-0.101	0.326	1.013	0.155
Selection:						
Rel. Imp.	18%	16%	16%	24%	28%	25%
Utility: G	0.532	0.651	0.405	0.715	1.183	0.660
L	-0.532	-0.651	-0.405	-0.715	-1.183	-0.660
Staff:						
Rel. Imp.	35%	18%	21%	13%	18%	12%
Utility: B	1.059	0.725	0.535	0.377	0.741	0.305
W	-1.059	-0.725	-0.535	-0.377	-0.741	-0.305
Quality:						
Rel. Imp.	38%	44%	59%	46%	27%	54%
Utility: H	1.106	2.079	1.429	1.144	1.396	1.514
A	0.066	-0.637	0.238	0.456	-0.554	-0.182
L	-1.172	-1.443	-1.667	-1.600	-0.841	-1.332

n = 107;
Note: percentages may not sum to 100 due to rounding.

Group one customers were distinguishable by their service-*orientated* emphasis, with the utility score indicating the perceived high benefits from this attribute. Respondents noted that they received 'good service [from] friendly and helpful staff'. Group two customers were characterised by the importance they placed on achieving *value for money* - whilst this group gave the highest utility to merchandise quality, there was also a preference for paying below average prices. Typical comments from such customers were that Next 'provide good quality clothing for fairly reasonable prices', and they are '...reasonably cheap, and I don't mind paying more money for better quality clothes'. This rationale contrasted with that of the customers from group three who were more overtly *quality-oriented*; the neutral price utility showing that they were prepared to pay to achieve this level of quality. Typically, they decided to shop at Next for Men because of the 'quality of clothes', its 'general layout' and because it is perceived to be a 'respectable company'.

The main factor important to customers in group four was a shift in importance to the overall range - with a combined emphasis on *selection value.* This indicates a subtle difference from customers in group two who preferred to pay lower prices, but placed a stronger emphasis on the selection available rather than quality alone. People in group four noted that the store provided products that were of 'good quality, not too expensive [offering]...different styles' and the provision of 'fashionable clothes', with products which were 'good for leisure and office wear'. Group five was the most *price conscious* of all the customer groups, preferring to pay lower than average prices, whilst looking for a good selection of products. Typical comments were '[I] like the quality of products and prices [which] are generally reasonable, [and the stores have] a good selection and staff are pleasant'. In contrast, Group six customers placed little emphasis on price, and were more *choice and quality conscious.* A statement typical of this group is 'although the variety is limited and prices are higher than average, the quality is good'.

7.4.4 Qualitative responses from Next for Men customers

These results suggest that core values, attached by customers to Next for Men, tend to be reflected in observations such as '[the company offer] good quality, stylish clothes with good brand image' and that customers come back for repeat purchases because they find there is 'good choice and quality from a respectable company'. The majority of respondents described the stores as providing merchandise of high quality and that they were prepared to have less choice and pay more to ensure a quality product, as suggested by one customer who stated that 'although the variety is limited and prices are higher than average, the quality is good'. Specific comments about the clothes being durable and of 'good materials that maintain colour and shape' reinforced the benefit to customers of buying clothes of good quality that will last. Purchase experience also confirms that shoppers are happy with the products with remarks such as 'happy with past purchases', 'consistency in stock throughout stores' and '[I] will always find something to buy'.

Customers did suggests some ways by which they would like to see Next for Men improve their product offer and their stores. The majority of customers would like to see ranges increased in variety and sizing and recommended the menswear department should be as large as ladieswear. Others who wanted larger stores confirmed this. A smaller number of customers proposed that prices could be lower and that there should be special discounts for students. Conversely, a couple of customers suggested that Next for Men could make the offer more expensive to make stores more exclusive. A high proportion said that they 'enjoy Next the way it is' and did not want any changes. Overall, these customer evaluations are very positive and it appears that Next for Men has something to offer most of their targeted customers, but that the majority would like to see increased selection and choice within larger stores.

7.5 Comparison of the Segmentation Analysis for the Two Retailers

Both companies appeal to very similar customer groups. Burton Menswear states they target the C1, C2 , 25 - 49 year old mainstream customer (Burton, 1996) and Next for Men endeavours to target the 20-35 year old consumer within the A, B, C1 social economic groups (Next, 1995). Both segmentation analyses would suggest merchandise quality to be the priority factor for all customers, with a high proportion being fairly price sensitive. Next for Men customers gain greater utility from 'higher than average quality products' than Burton Menswear customers, although they also use quality as the main deciding factor. Having a good choice is a much more important factor to Next for Men shoppers (utility range from 0.53 to 1.18), than those at Burton Menswear (utility range from 0.55 to 0.96) based on five sub-groups accounting for about 85 per cent of customers. Next for Men customers are also more demanding in their requirements for staff to provide a better than average service (utility range from 0.54 to 1.06), than shoppers at Burton Menswear (utility range from 0.62 to 0.95), based on four sub-groups accounting for approximately 70 per cent of shoppers. Price orientation is more predominant with shoppers at Burton Menswear, where 45 per cent are price sensitive and trust that they gain an advantage from lower price (average utility 0.75). This differs from customers at Next for Men, where 33 per cent of customers are price sensitive and believe that they obtain a high usefulness from 'lower than average prices' (average utility of 0.96). These differences may be as a result of a keen pricing policy in Burton Menswear and indicates that a reasonable proportion of

Next for Men customers is very susceptible to price points.

When analysing segmentation data it is important that the four criteria of viable, identifiable, measurable and accessible are considered (Walters and White, 1987). In this instance, each company would have to evaluate which segments are large enough to be profitable; whether potential sub-groups can be distinguished in terms of lifestyle and income and thus targeted through promotions and advertising. Only then will segmentation studies fulfil their true potential.

7.6 Conclusion

Lifestyle marketing to focused customer segments appears to correlate to market success in the fashion sector (Lewis and Hawskley, 1990; Moore, 1995). The results of this analysis show that these over-arching values eclipse different needs and images of sub-segments in the customer groups, which place differing emphases on combinations of the key choice attributes. These differences are important for two reasons. First, they suggest that the 'hard and fast' categorisation and matching of customer profiles by retailers is misleading, and that there is a need to be more sensitive to the subtle differences *within* a retailer's customer base. Second, the implication of these tentative findings is that retailers could reach different parts of their target group by emphasising combinations of attributes important to sub-segments of their customer base within their communication activities.

This segmentation analysis began by focusing on two retail chains, Burton Menswear and Next for Men. Conjoint analysis revealed the different emphases put on attributes of store image by sub-segments of the customer base, with the empirical study isolating the preferred 'bundles' of attributes for these customer groups. This pragmatic methodology is in-line with the idea of store and product positioning and offers customer segmentation data relevant to specific targeting of customer groups. The study highlights the implications of understanding customer perception of store attributes when encouraging customer loyalty and, from the analysis of respondent groups, it appears that both retailers appeal to a cross-section of consumers. However, differences between the sub-segments suggest that there is significant scope for fashion retailers to tailor their market position within the overall customer base to meet customer needs more specifically.

This closer targeting process has two main dimensions, the most obvious of which is in terms of the strategic marketing of individual companies. A second potentially fruitful area for further research could address how staff themselves might help tailor marketing activity and improve effectiveness at the store level. A key factor in this process will be for staff to identify the different behaviour patterns of customer groups and, hence, to modify their approach to meet the needs of different customers more effectively. Such a strategy clearly requires larger-scale studies of in-store behaviour patterns to be able to construct such a typology. Hence, there is a need, having identified the main attributes of store choice involved in fashion retailing, to examine in greater detail how these 'bundles' of attributes vary between retailers, and to examine, through additional qualitative research, how the process of trading-off works in specific circumstances and how it comes together in individual purchasing acts. Equally important is a need for the retailer to explore their own image perception and how and why this might vary from that of their customers. Undertaking such analysis would provide fashion retailers with the knowledge to meet the needs of their own customer groups and would allow them to concentrate their marketing activities on those attributes, which are the most effective in increasing their customer base. In these ways, future research into store choice could have some very important strategic and trading ramifications.

The next phase will compare customer evaluations of Burton Menswear and Next for Men with retailer perceptions of their own market position as well as evaluating the way store and marketing managers from these two companies communicate and attempt to build the image of their stores.

CHAPTER EIGHT

PHASE FOUR: QUALITATIVE RESEARCH

8.1 Introduction

The first phase, of empirical research, identified attributes important to consumers when they choose where to purchase menswear fashion clothing. The second phase utilised a multi-attribute model to confirm these attributes as important and to measure consumer store image perception of five national multiple menswear retailers. Two retailers with disparate store images were then selected for in-depth analysis. Retail staff perceptions of store image were evaluated using the multi-attribute model; then the consumer behaviour of customers from two retailers with disparate store image were considered using conjoint analytical techniques. Finally, in this chapter, company strategies and trading operations are compared with the aim of identifying any similarities or differences that may contribute towards customers having differing store image perceptions.

This phase utilises a qualitative approach by conducting key informant interviews with a purposive sample taken from both companies. The chapter presents the results of these interviews and compares the techniques retailers use to maintain and strengthen their store image and market positioning in the eyes of their customers.

Qualitative methods were used during this phase of the research to understand the phenomena as presented by the interviewees. There was no requirement for statistical rigour in selecting respondents as it was more important to interview those with extensive knowledge of the situation. The employees understanding of how their company utilised marketing strategies to sell merchandise, and to communicate with their customers and staff, were identified and modus operandi compared for both retailers. The analysis focuses on methods and processes and highlights a number of critical success factors. The information from the key informant interviews was analysed using content analysis techniques and six separate themes emerged:

- Target customer groups and main competitors
- Commercial management
- Product and brand characteristics
- Customer service
- Marketing communication
- Future developments

The following sections consider these views in detail and where appropriate, the respondents own words are quoted verbatim.

8.2 Target Customer Groups and Main Competitors

Burton Menswear targets 25 to 49 year old males within the C1C2 socio-economic groups (Burton, 1996) though they also have many A and B group customers. The area manager expressed very succinctly that the 'average Burton Menswear customer is probably 35 years old, not too conscious about brands and labels, but wants to be dressed in quality clothes and be fairly up to date but not in high fashion, in terms of design and what he is wearing'. This may vary from store to store, as the manager at the largest outlet in Glasgow suggested the majority of shoppers came from the C2 socio-economic group and described them as 'normal working class men, age group 25 - 40, [shopping with] their family'. Furthermore, by stocking a range of youth wear for the nine to fifteen year old, the company aims to target customer groups which includes the whole family within these parameters.

The area manager highlighted one of Burton Menswear problems as 'trying to be all things to all people between the ages of 25 and 45'. This was confirmed by another spokesperson who suggested that the company goal was 'to serve everybody, not just the selected few'. For example, at one time the company would be concentrating on the younger end of the market and trying to sell very fashionable, youthful ranges and later there would be a U-turn in the buying strategy and the company would concentrate on trying to satisfy the needs of the older end of the market.

Burton Menswear is looking for new ways of segmenting customers. Previously the company had rigid targeting structures: the classic, the progressive and the contemporary customer. The classic customer was identified to be the older gentleman who had purchased from Burton Menswear for several decades; the progressive customer was described to be in his mid thirties and attempting to be trendy; and the contemporary shopper would be the mature end of the Top Man target customer group, who was just graduating into the Burton Menswear range. This method of fixed targeting is now being reviewed.

Next for Men designs ranges for the 20 to 35 year old customer from the ABC1 groups (Next, 1995). These consumers are considered as having the highest fashion spend. However, they acknowledge that around a third of the business is generated from customers from the C2 group. The group marketing research manager at Next suggested that many younger consumers shop at their stores despite having a modest income. They find that these customers have money to spend on clothes as, in the main, they live at home with parents. The marketing manager stated 'we are catering to a broadening spectrum. Our customers are concerned about their personal appearance and have a strong sense of style, but they are not fashion innovators'. All of the interviewees thought that Next for Men had a unique market position without direct competition.

Both companies cater for a variety of lifestyles to suit the fashion conscious consumer or the businessman; at work and play. Furthermore, approximately a third of purchases are bought by women for their partner or as gifts. This corresponds with national surveys where women are identified as playing an important role in the purchase of menswear clothing. Women, in general, buy the cheaper items such as shirts (43 per cent) and knitwear (38 per cent) which can be exchanged easily. This trend, however, is diminishing as younger men are gaining in confidence and also trading up (Mintel, 1993a; Mintel, 1994).

Both retailers identify their main competitors (Table 8.1) and conduct comparative shopping activities to assist in the identification of points of differentiation. These include the bench-marking of competitors products and promotional events which influence customer purchase decisions and hence sales.

Previous empirical research within this study identified the proportion of customers who purchased from a combination of these retailers (See Chapter 6, Section 3.11). This is confirmed by managers at Burton Menswear who view their two main competitors to be Marks & Spencer and Next for Men. River Island is not perceived by Burton Menswear managers to be a strong competitor but they accept that there is some competition within the suits and jeans market. Burton Menswear also describe niche retailers and sportswear retailers as competitors, particularly on a local basis. For example, nearly a fifth of the company turnover comes from sales of denim ranges. This includes their own brand, Nico, and the national brands of Levi, Wrangler and Lee. Most of this competition comes from retailers specialising in selling jeans. The area manager pointed out that sportswear retailers within a small town can help to keep customers shopping in their local high street, and could, thus, be seen to support the sales of formal clothing in Burton Menswear, however it would also result in a decrease of turnover in the sportswear department.

Table 8.1 Summary of competitor analysis for Burton Menswear and Next for Men

Competitors	**Burton Menswear**	**Next for Men**
Marks & Spencer	Higher priced main competitor	Main competitor, used for bench-marking on prices and quality
River Island	Higher price and fashion-led	Fashion-led; used by younger customers
Principles for Men	Fashion- led for middle age group	Competitor on quality and style
Top Man	Fashion- led competitor for the younger age groups	Competitor at lower price end ranges; used by younger customers
Next for Men	Second main competitor	N/A
Burton Menswear	N/A	Not perceived as a competitor by management at Next
French Connection, Reiss, Jigsaw etc.	N/A	Strong competition in fashion forward ranges
Cruise and upmarket independent retailers	N/A	Local competition on designer fashion
Sportswear retailers	Strong local competition	Some basic competition at the lower end
Slaters Menswear	N/A	Competition mainly in suit ranges
Discount fashion retailers	Strong local competition in casual and formal wear	N/A

Source: Company interviews

None of the interviewees perceived Slaters Menswear provided competition to Burton Menswear in Glasgow, either in formal or casualwear ranges. This is surprising since Slaters Menswear promote the company as being listed in Guinness Book of Records as being 'The world's largest menswear store' selling suits at up to 40 per cent discount on ranges such as Daks, Baumier and many other makes. They also sell casualwear, denim ranges and shoes and offer free alterations. They promote themselves as being a 'one stop gents shopping' environment.

The main competitors of Next for Men are identified to be Marks & Spencer, Principles for Men, River Island and Slaters Menswear, although the area manager felt that, recently, Marks & Spencer was providing less competition 'because we feel that with the priority we have put on customer service over these last twelve months, we seem to take a lot [of trade] from them'. The Burton Group of companies were all perceived as less of a threat due to 'the quality and the price we offer. We are very competitive'. Some of the up market fashion retailers, such as Jigsaw, Reiss, Cruise and French Connection, are also perceived to be direct competitors. They are not individually particularly important, but collectively have an impact on the market. Moreover, the independent sector is particularly strong in menswear and thus is aggregating a large share of the market.

The view of the marketing research manager was that Next for Men had increased its market share from 1.5 per cent in 1991 to about 4 per cent in 1997 due to a clear understanding of customer needs. Furthermore, she suggested 'that people are quite prolific when it comes to fashion shopping. There is a degree of loyalty, but people will shop anywhere or everywhere depending on the budget and the particular need they are trying to fulfil.'

In summary, both companies target similar customer groups with Burton Menswear trying to appeal to a very broad consumer base whereas buyers and merchandisers at Next for Men appear to be more focused on designing their products for clearly defined customer groups. Furthermore, respondents at Next were more aware of their main competitors.

8.3 Commercial Management

8.3.1 Mission statement

Managers at Burton Menswear were not sure whether the company had a mission statement, but the marketing communications manager suggested that the company aims 'to be the one stop shop for men'. In contrast, interviewees were aware that the company wanted to increase customer orientation by 'making the customer the focus of everything we do'. Although this statement was not known by all interviewees it was suggested that it was part of the embedded culture of the company.

All staff at Next are issued with a handbook which includes the mission statement and the view was that the general content was known by nearly all staff. The company aims 'to be the natural choice retailer, in the UK, for fashion aware men and women who expect style, distinction and quality from their clothes' (Next, 1995).

8.3.2 Structure and employment policies

Both companies use a traditional hierarchical system of management with a company structure depicted in Figure 8.1 and Figure 8.2. At Burton Menswear only management and supervisors are on full time contracts. All sales staff are either on part-time or zero-hour contracts. These zero-rated staff or key time staff, as they are also called, are brought in when required and paid on a weekly basis. This often occurs at very short notice and some weeks they may not be required to work at all. This can be unsettling for staff as they do not know how much money they will be earning each week and has lead to high staff turnover. These employees are particularly cost efficient for the company as they collect no additional benefits, such as paid holiday, sick leave or have national insurance contributions to pay, as long as earnings fall below a stipulated amount and they are not provided with the same benefits, such as staff discounts, as full time staff (Burton, 1995). Part-time staff have fixed term contracts. This can be for eight hours up to a maximum of 28 hours per week. Part time staff work four hour shifts and thus are not entitled to tea or lunch breaks. Moreover, Burton Menswear utilise staff employed by concessionaires to provide service on their specific areas. Typical employment profile for a large store would be: six full time managers, six part time sales staff contracted 20 hours (five shifts of four hours), approximately eighteen part time staff on zero hours contracts, a YTS trainee and nine concession staff (St. Enoch Centre).

Figure 8.1 Company structure at Burton Menswear

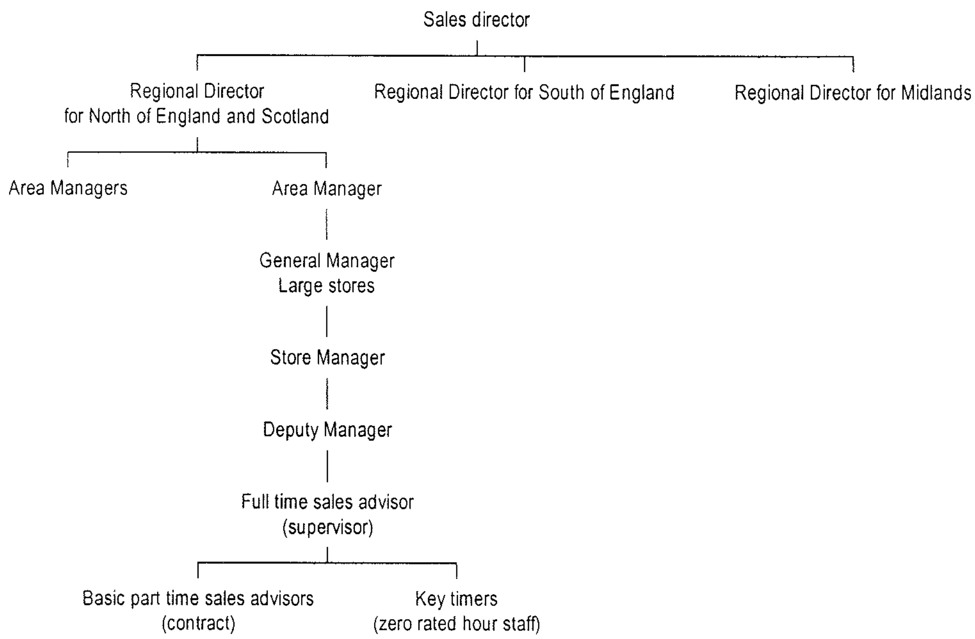
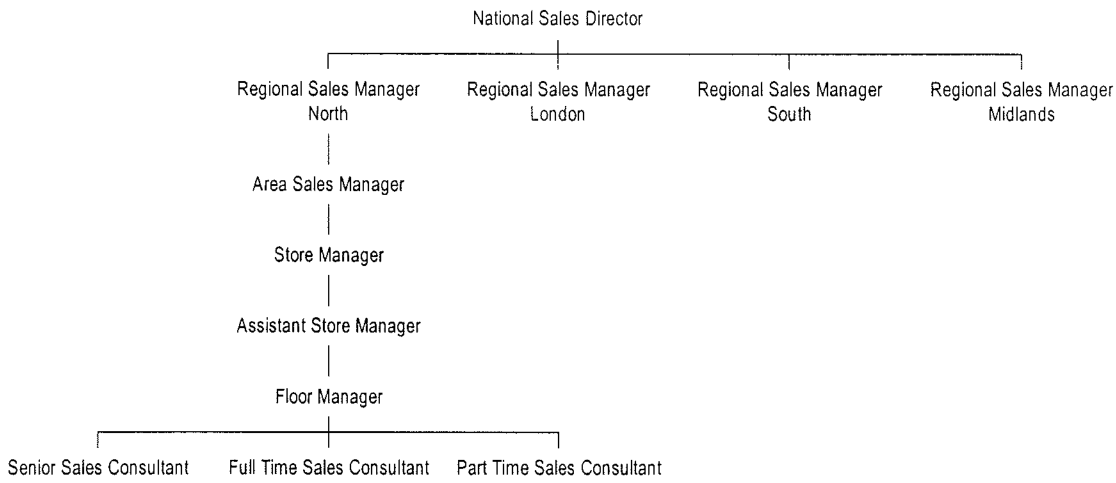


Figure 8.2 Company structure at Next for Men



A complex system of individual commission and store based bonuses are paid to staff. The marketing manager agreed that there appeared to be a problem in staff motivation and referred to Richer's (1996) suggestion of there being a correlation between staff turnover, motivation and customer service. Furthermore, it was suggested that staff in Burton Menswear were rewarded in ways that may not optimise the business. Recently, Burton Menswear has reviewed their employment policy. 'We are starting to recruit again for full time staff. We now feel that it was really the wrong way to go.'

Next, in contrast, employ an equal proportion of full time and part-time staff with one store reporting that it had a higher number of full time than part-time staff. Only employees taken on for the Christmas trade have temporary or fixed term contracts. All other staff have permanent contracts from eight hours up to 39 hours per week. The staff feel secure, as they know how much they will take home in pay every month. The company now finds that 'everyone wants to work for Next, both in head office and in the stores'. Management suggest that, good rates of pay, staff benefits such as paid holiday and sick leave; generous uniform allowance; staff discount schemes; and enhanced staff participation by way of share and savings schemes lead to increased staff loyalty and result in lower staff turnover. When someone joins the company 'they get into the Next culture and realise how friendly the team is is'. Many sales consultants and managers have worked at Next for many years because they have confidence in the company. They feel that the company treats them well and they feel part of a team.

8.3.3 Culture of the company

The culture of Burton Menswear was not a theme that emerged from the interviews with the staff, even with the managers interviewed who had worked there for many years. The marketing manager did point out that decision-making 'is very hierarchical, particularly when the division is not doing well, when it gets a lot of input from senior management. The company is very centralised - a lot of downward communication rather than upwards'. There appear to be little interaction between store management and head office departments. Furthermore, staff identified that barriers existed between the managers, who had been with Burton Menswear for a number of years, and their staff, but this was less of an issue with the younger managers. It may be that team efforts emerge as undervalued compared to individual performances due to the high number of part-time employees.

In contrast, respondents from Next claimed that the culture is very team orientated with everybody working together to achieve the common goal. Bonus structures are based on the store achieving targets and are paid pro rata on hours worked. As a result of an improved communication and networking system, designers and merchandisers frequently visit the retail outlets to talk to management, staff and customers to identify the reasons for fast and slow selling product lines. 'Store managers and senior sales staff are also involved in product selection at a very early stage...because we realise that they are the people who speak to the customers'. The sales consultant described the store staff as a 'family' and was very positive about the way Next systematically trained staff and promoted from within. An example was the Argyle Street store, the largest Next in Glasgow, where five floor managers, two assistant managers and the store managers had been promoted from sales consultant positions.

8.3.4 Management of stores

In the past, store managers at Burton Menswear were very strictly controlled from head office. The marketing communications manager suggested that there had been problems with the general standard of presentation within the stores and as improvement became apparent, other factors such as 'customer focus' would take over for a period. In general, most decisions are managed from head office with some discretion given to store managers, but local decision making was not confirmed by any of the store interviews. Store managers are particularly focused on completing the weekly paperwork such as the competitor reports. These inform senior management at head office of competitor promotions and windows displays and also ensure that store managers are aware of best sellers at other retailers and that they have similar product options available. In some stores, managers hold weekly meetings with senior staff, but in general, store management communicate on an informal basis, with sales staff.

The area manager at Next stated that 'managers have become a lot more commercial than a few years ago'. They are supported in their role by computerised reports for space management, best seller lists and sales records, which are used in conjunction with floor walk records. Store managers can now make decisions based on factual information and do not rely on their own intuition or common sense. As space is limited and very expensive, managers have to be very aware of 'hot spots', best sellers and space wasters. For example, store staff can move stock around to ensure that best sellers are 'forward faced' and accessorised in prime selling areas to ensure all customers see them and space wasters are identified and taken off the floor.

8.3.5 Training schemes

Burton Menswear has systematic procedures laid down for staff training for both new and existing staff and it is the store manager's responsibility to ensure staff competence. A handbook and a number of training cards are issued to new starters (Burton, 1995). In practice this may mean that 'managers will speak to new starters for an hour and then let them loose on the customers'. The comment from the sales assistant interview was that 'I did not get very much training. You just pick things up as you go along on the floor. Managers have guidelines for induction, but I did not receive that'. This incident did not happen in isolation as he continued 'one new starter was told to stand by the Chino's. I felt sorry for him. He did not know how to approach customers. He just had to pick things up as he went along; it was the same every Saturday. A lot is to do with selling skills, but they tell you nothing about that. You don't get any product training ... if a customer asks you something you get really stuck'. This current training problem was also confirmed in focus groups conducted with staff by an exploratory study (Arnold and McLean, 1998) and by a newly appointed area manager, who joked that 'training material issued from head office is used as door stoppers in stores' (Reid, 1998).

These statements contrasted with the manager perceptions of the way they trained their staff. They pointed out that the best training is on-the-job and that the company provided training literature, about products and procedures, for staff to read in their spare time. The area manager confirmed that the company does not have a formal training procedure, but hoped 'that our recruitment and selection procedures are correct and ...we give staff as long as they need to get comfortable in serving customers'. It was suggested, though, that a tailored training programme for new starters would be useful, although evidence of structured induction programmes was produced elsewhere. The same manager also confirmed that staff did not know enough about the products they had to sell and that 'they were more geared up to filling shelves'. Training, in some stores, was provided to staff on a compulsory, unpaid basis and delivered outside trading hours. This, in particular, does not enthuse staff but may only be a local issue. The training department issue a number of workbooks geared to different levels and these are available for on-going training of staff. Completion of each level results in a higher rate of pay and an opportunity to be trained for a management position, when all levels have been successfully completed. Annual performance appraisals are conducted for all staff and linked to the salary review.

Management at Next believe that part of its success is due to the systematic training they give all staff and managers. There has been an increased investment in the development and education of all employees. All new starters have to complete a three months training programme including on-the-job training in selling skills, customer service, till training, stock room systems, fitting room procedures, merchandising and display. Although the sales consultant interviewed did point out that most of the training just happened as she worked on the floor and was therefore not appreciated to be 'training' as such. On its completion they receive a salary increase and are known as qualified members of staff. New starters are also allocated a sponsor or mentor to help with on-the-job training. These mentors have all undertaken a train-the-trainer course. All staff attend product training sessions which occur every six to eight weeks, when new phase stock arrives in the store.

The training lasts half an hour but is updated in the daily ten minute team briefings, where features and benefits of specific merchandise ranges are discussed. Moreover, training packs and videos are available in the stores for subjects such as security, customer service and health and safety.

Senior sales staff undertake systematic management training. For each promotional step a programme of training days has to be completed: three days for supervisors; four days for floor managers; and five days for store managers. There are additional training events for store trainers and new developments such as IT.

Next allows staff to be empowered, to use initiative and be responsible for their decisions. As one manager said 'the company is not parental, it allows you to develop your own style, to make your own commercial decisions and to make mistakes. It does not dictate what you have to do, so consequently ... we run our stores as our own business because we are given total control'. This trust between senior and store management has helped develop the potential of many managers. Furthermore, management at Next also view one of the reasons for high staff motivation to be their standardised appraisal system, as it encourages everyone work towards the same goal.

In summary, the marketing manager appraised Burton Menswear stores to be tightly controlled from head office with managers generally using an autocratic management style. In contrast, managers at Next appear to be more empowered and try to develop their staff. This may be a result of the extensive systematic training provided at all levels within Next as opposed to Burton Menswear where induction and ongoing training appears to be less structured even when a systematic training programme is provided from head office. The culture, as observed during interviews with Burton Menswear staff highlights the differences between management who had been with the company for a number of years and sales floor assistants. This is very different to Next where management and staff work together and are rewarded individually as well as in teams. This is partly a result of the different employment polices in the two companies as the sales consultant from Next put it: 'Next does have many rules and policies, but they don't stifle staff in their work. The rules and polices are there to give staff direction and to inform them of the standards that the company expects'.

8.4 Product and Brand Characteristics

Empirical research in the second phase identified product characteristics to be of the highest importance to customers. Retailers, therefore, have a number of product options to consider when deciding how to build and reinforce their brand. It is important to gain an understanding why consumer perception is different for these two retailers and analyse how the companies manipulate product variables to enhance their image.

'Burton Menswear is not at the cutting edge of fashion but is probably one season behind in design seen at the fashion shows' (Britton, 1997). The company has a strategy of selling some national brands, for example Wrangler and Lee jeans, alongside their own-label 'Nico' casualwear range. Similarly, sportswear is sold under the 'Atlantic Sports' label and larger stores also sell Nike and Reebok brands. All formal suits are sold in a concession-style arrangement and sub-branded 'Burton Menswear'; 'Jonathan Adams'; or 'Jeff Banks', depending on price and design. Large stores may have additional concessions such as Stonebridge, Afters shirts and Savannah leather besides the Baird suits. The strategy in developing the two designer suit brands is that younger people are very brand aware and it was recognised that a Burton Menswear label would not project the 'right' image. The area manager stated that 'what matters to the customer is the credibility of the garments they are wearing. If customers are telling us that the Burton Menswear label doesn't have credibility - we take the label off and put another on'. The older customers still believe in the Burton Menswear label and this accounts for two thirds of the suit business.

The product proposition at Burton Menswear, was summarised by the company as being 'very reasonable ... at a competitive price'. It was suggested that the company's main difficulty was 'to convince customers that Burton Menswear is trying to get rid of the image it had years ago'. The strategy of the company then was to trade quality standards off against highly competitive pricing. This, it was felt, has led to an image problem and reinforced customer perceptions of poor quality. It has been observed by both staff and management that 'some customers come in and buy something, but as soon as they are out of the door they take it out of the bag, throw it [the carrierbag] away and put it in another bag'. The marketing communications manager confirmed that people 'are not proud to carry a Burton Menswear bag down the high street'. They are embarrassed to be seen with the Burton Menswear brand and it will be very difficult to change this image and reputation.

Burton Menswear holds a number of focus groups with customers to gain reaction to a range before it is launched. Some research has also been undertaken on the presentation of folded garments. The response has been that the customer is unsure whether to unfold them or to wait for staff help. Hence, product presentation is being reviewed. One positive point that recent research has indicated was that the quality of some selected lines compared favourably with Marks & Spencer and Next for Men in unlabelled comparisons, but in labelled testing issues were raised about quality.

The broad consumer base, that Burton Menswear is targeting, has caused a number of market positioning problems. These were highlighted by a manager who noted that 'when I put high fashion at the front of the store I chase away the older customer ... when I put classic stock there, the younger guy will not come in'. The marketing manager confirmed that these problems had been identified in previous research conducted for the company, which found that loyal users perceive the product to be of acceptable quality at a good price, but the non users 'see the product as naff, lower quality, either too old for them or too young. We suffer from both ends of the spectrum. From the heritage of suits and formal wear, which is the strength of Burton Menswear ... and the reputation from the 80's and early 90's of deep discounting and very cheap products'. Furthermore, the older customer now feels that Burton Menswear is targeting the younger customer. The company has historically catered for the older man and his son. The issue facing the company is whether the merchandise assortment and brand image is sufficiently strong to cater for the younger, brand aware consumer while at the same time keeping the core of the business.

In contrast, the design and buying team at Next for Men provides a selective product range to cater for those customer groups who want a fashionable product. The quality of the merchandise is critical to Next's brand strategy. 'We have quality checks on the fabrics at head office before it [the garment] is made up and we have quality checks in the warehouse when the garments come in.'. The whole presentation of products to the customer implies quality. Furthermore, the company knows that the product is only available in Next stores.

A senior manager summarised the product proposition at Next as being 'an equation of style, quality and price ... with a brand image that is acceptable and safe'. 'Next still has the classic customer, who wants the two pleated trousers, but recently the designers have increased the amount of higher fashion edge garments. This means that there is less stock available for the classic customer and more product options for the fashion-led shopper'. The view of the area manager was that the current range over accented high fashion garments which might affect sales.

Contrary to Burton Menswear, one spokesperson for Next suggested that 'using a Next bag is synonymous with having good style, good taste; you are buying a marginally more expensive suit that is going to be of good quality and you are going to look good in it'. The marketing manager confirmed that 'lots of people use Next carrier bags ... which speaks volumes'.

8.5 Price Structures

The poor image perception of Burton Menswear may also be due to the fact that consumers see price points as an indicator of quality (de Chernatony and McDonald, 1992; Dodds *et al.*, 1991; Donovan *et al.*, 1994; Martins and Monroe, 1994; Monroe, 1990; Monroe and Petroshius, 1981). Some managers at Burton Menswear are of the view that 'the cheaper you make it [means that] people will not trust it, especially in clothing'. And 'As a company, we focus on being reasonably priced; when we should be focusing on the quality of the garment'. Field managers are not involved in the pricing of merchandise but some of them feel that price structures are too low and it would benefit the company to sell at slightly higher price points. Moreover, they think that customers do not trust clothing priced too cheaply. The area manager identified the price of products and the label on the clothes to be a problem for the company and suggested that this could be remedied by using new labels, which would also facilitate new price structures.

Next for Men view Marks & Spencer as 'having a presence in the market and they are the ones we inevitably benchmark ourselves against on price and quality on the basic type item'. In the past, products at Next were thought to be expensive, but the company has endeavoured to change this viewpoint by introducing basic product lines at price points which match Marks & Spencer. They have also changed the window displays which now give clearer price indications, and have trained staff to sell the features and benefits of the product. The marketing research manager pointed out that customers regularly say that they 'are prepared to pay that bit extra for the styling and quality; but we remain observant and constantly check our price positioning'. Average prices are higher than similar garments at Top Man, Burton Menswear and River Island.

A comparative shopping exercise was carried out by the researcher on Tuesday 3 June, 1997 in Oxford Street, London. The five companies, on which the research has been based, were all visited. In addition, Marks & Spencer was included since all the retailers use the company as a benchmark. Seven items of fashion clothing were selected and the cheapest price point on that day for each product was listed (Table 8.2). Thus, the product compared, were not necessarily of the same fabric composition, style or quality.

Analysis of price points confirms that Burton Menswear is cheaper than the other retailers listed for casual wear, and that Top Man and River Island have the lowest price points for formal wear. In three of the selected product groups, price points at Next for Men are higher than Marks & Spencer.

Table 8.2 Comparative price points, in £'s, on cheapest garments for sale.

Product	Burton Menswear	Next for Men	Marks & Spencer	Principles for Men	Top Man	River Island
T-shirt	**6**	8	10	8	**6**	7
Polo shirt	**10**	13	13	13	13	15
Chinos	**23**	27	28[a]	25	25	25
Jeans	**20**	25	22	25	22	23
White shirt	10	15[b]	12[c]	20	**9**	13
Blazer	85	90	90	90	85	**70**
Suit	120	130	110	160	**100**	110

Source: comparative shopping

[a] Marks & Spencer had a version with elasticised waist at £23

[b] Next for Men had a pack of two for £20

[c] Marks & Spencer had a pack of two for £22

8.6 Customer Service

Subsequent to the empirical research being undertaken in this study, Burton Menswear has concentrated on improving customer service skills and now evaluate in-store customer service by completing mystery shopping reports. The marketing communications manager stated that customer service has now improved and thinks the service now to be on par with Next. Each store and each member of staff are measured and rewarded on the provision of good customer service if targets are achieved and costs are maintained within budgets.

One of the Burton Menswear store managers suggested that training sessions on selling skills and customer service had a very high profile, yet the staff had to attend these training sessions after work and were not paid for their attendance. The employee view was that staff got little induction or ongoing training in selling skills and product knowledge but 'that you had to pick things up as you went along ... You could get more sales if you knew more'. The area manager did point out that customer service should be a priority as it is 'probably the single most important thing' that store managers and staff can influence and although it might not be as important as the product, from a customer's point of view, it can make a big difference in sales turnover.

The area manager at Burton Menswear thought the product should be selling itself. Service should be good, but he admitted that staff in general probably only knew about 30% of the product knowledge expected of them. Information is made available but it is up to staff to use it to advantage.

'The culture ... in Next is one of genuinely providing the best shopping experience that customers can possibly have' (Peacock, 1997). Customer service, as part of the whole image, was confirmed by a Next manager to be the way the company differentiates itself, by ensuring 'a style edge and consistency, which is applied to the product, store layout, labelling and the quality of staff'. The company uses mystery shopper reports to monitor the service provided and stores receive detailed feedback on performance. Currently, there is an emphasis on the fitting rooms, both the physical environment and the service provided by staff. Good customer service and honest feedback is important and the mystery shoppers test this out.

Strengths and areas for development are identified for each employee and if they are particularly good servicing the fitting rooms, they are used to train other staff to be confident in providing this service. Each new employee has an individual training programme tailored to their needs and the store's requirements. As mentioned previously, the company also provides a number of videos to help with customer service and selling skills to which employees have access. All training is normally conducted during working hours, but on special occasions additional training may need out of hours sessions for which staff are paid.

The marketing research manager pointed out 'that 95 per cent of people who come into a Next store never have any interaction with staff except at the till point' and that store layout, graphics, merchandising and clear labelling provide the initial sales information. The important point is to be able to 'read' what the customer wants and then to be able to provide the service required. Mystery shopper reports identified that staff were not good at assessing when a customer wanted assistance, but the service provided and staff knowledge of the product was excellent when help was requested.

In brief, both companies use mystery shopping reports four times a year to monitor the service provided by staff and the stores receive detailed feedback on their performance. The effectiveness of these reports depends on the criteria measured being important to customers (Richer, 1996; Woodruff and Gardial, 1996; Zeithaml and Bitner, 1996). In fashion retailing, customer service is of very high importance and it is here that retailers can differentiate themselves (Beatty *et al.,* 1996). The main difference between the companies emerges in the practice of staff training. The Burton Menswear system appears to be unstructured, in the stores utilised for this study, compared with Next where training is structured, systematic and implemented. Research indicates that customer satisfaction is related to staff motivation and staff turnover and if employees are satisfied, customers will be gratified and return (Zeithaml and Bitner, 1996).

8.7 Marketing Communication

8.7.1 External marketing communication

Recently Burton Menswear advertised its retailer brand through a campaign photographed by David Bailey to promote a particular image and lifestyle rather than specific products. This was less successful than the company had hoped because the message became diffused in the presentation (Corporate Intelligence, 1997d). Burton Menswear uses window displays as the prime method of building product awareness. Window layouts are controlled centrally and implemented locally by store staff. Merchandising within the store is product blocked within ranges and displayed ether hung up or alternately folded on tables or shelves.

Burton Menswear advertises in magazines such as Loaded and FHM, which target ABC1 men in their late teens to late twenties (Mintel, 1997e), and stores receive a weekly list of advertised products. But the store managers felt that effective communication with customers also consisted of staff approach on the shop floor and invitations to account customers for special preview nights.

Complaint handling is important for any organisation. Most retail companies have a customer service department. The marketing manager at Burton Menswear confirmed that standard complaints are not routinely forwarded to senior management and only the worst complaints made their way to head office as most were dealt with at store level.

Next builds up customer awareness by window displays, in-store merchandising and via the staff. The windows, which consist of product displays and graphics, are very important to Next and they have a dedicated window display team. Window layout instructions are sent from head office to travelling display personnel to ensure consistency across the chain.

Stock within Next for Men is product blocked and displayed forward facing for improved visibility. The company has moved away from folded and stacked garments. Presentation of merchandise is very important to Next staff and helps to establish the 'quality' image that Next is consistently trying to promote. The company has started to use swing tickets to inform customers of new developments in the nature of fabric finishes and contents rather than rely on sales staff. This is partly market driven as Marks & Spencer takes a particularly strong lead in this area and Next is keen not to be left behind. Next communicates with its customers not only by the design of the store environment and the product presentation, but also through the ticketing and point of sale material, which emphasise the design features to promote the value of the brand.

Next management use the Next Directory mail order catalogue, as a prime method of communicating with customers away from the stores. This was voiced by one senior manager who stated that 'The Next Directory is without doubt one of our biggest benefits compared to other retailers'. The company sends out a preview Directory to selected customers three months before the new season stock is launched in the stores. Customers can pre-order and these orders indicate to the buyers which lines are likely to be best sellers and enables them to adjust orders. The company judges this way of communicating with their customers to be a real differentiator between themselves and their nearest competition and it is interesting to note that both Marks & Spencer and Burton Group are investing in mail order businesses to eliminate this advantage.

Next do not have a large budget for media advertising. They take the view that 'we have a conversion rate of one in four or one in five; and we know that a very high proportion of our target market use us and, therefore, we tend to use market communication in or around the stores' (Williams, 1997). The company feels that this makes commercial sense since they can measure the payback from money spent on stores, but cannot see the return on media advertising, although some advertising is placed in magazines and on TV to support the brand. The company has been very successful in using PR to get coverage in magazines such as 'Loaded' as well as the regional press, but in the main they are more successful in obtaining ladieswear editorials (Williams, 1997).

Regular product surgeries (focus groups) are held with customers to gain their opinion of product and service provision at Next. Customer relationship developed by the company is considered very important. 'Next does a lot of consultation with customers to find out what they want and take it on board' (Peacock, 1997). The company also takes complaints very seriously. From a company perspective complaints are monitored for each store as part of performance management and forwarded to regional, area and store managers. It was pointed out that 'most complaints come from staff. They hear them before anybody else. Staff complain because if there is a problem with the store, the fixtures or the product, they are the first to suffer and may lose their bonuses. So staff contact relevant departments directly to be able to solve problems quickly'. It is very important to the company that customers enjoy their shopping experience and want to return.

8.7.2 Internal marketing communication

Good internal communication is key to quality management (Crosby, 1980; Quinn, 1990; Richer, 1996; Woodruff and Gardial, 1996). Burton Menswear buyers, area and regional managers work together to bring the season's ranges into the stores. For example, proposed new ranges are presented to the managers to gain their opinion. The area manager's view was that 'we can influence as a group not as an individual' Area managers also provide qualitative sales information to the weekly board meeting and directors consider issues if the same point emerges from different divisions or regions. It was suggested that 'it is easy to impact the business because the Board takes notice of area manager feedback' but this was qualified by the view that 'it is human nature not to bring bad news, so managers are unlikely to forward derogatory or negative customer comments'. There is only a limited amount of communication between the buying and merchandising departments at head office and the stores. This main link is via an e-mail system.

Burton Menswear have a staff suggestion scheme in which employees are rewarded appropriately. The marketing manager pointed out that because the stores were not performing particularly well, interactions tended to be downwards rather than encouraging upwards communication.

In 1992, Next introduced a system to improve communications throughout the business. A document identified everyone who worked at head office, gave a brief description of responsibilities and listed extension numbers. Store managers, floor managers and senior sales consultants were encouraged to telephone the relevant person when they had a product query or problem. The area manager mentioned that managers had been afraid to telephone head office and were unlikely to know who to speak to. Now he said 'you can ring the buyer or merchandiser and say I have a problem with this garment or I have not got this garment and expect an answer'. The buyers and merchandisers also find this fast track line of communication beneficial. They can identify problems early in the season and contact manufacturers to ensure it can be solved. Furthermore, the company conducts many trials and 'wearer tests' with specific garments and fabrics. Consequently, staff undertaking wearer tests have to give regular feedback on the products they purchase. This is an additional way of testing quality in practise and will influence the next season's range.

During the design and planning of a new season's range, area managers and selected staff are involved in the selection process and will discuss best and poor sellers of the current season with the buyers. Both sides of the company, head office and store staff, find this a very useful way of breaking down traditional barriers.

Staff at Next have a similar suggestion scheme to that at Burton Menswear. One such idea was to design a hanger to present folded stock. This is now being trialed in the stores and staff have been asked to inform head office of the benefits or disadvantages of this method of merchandising.

The marketing research manager at Next was surprised by the number of people working at head office who had 'come through from the stores. There is none of the 'them and us' type attitude between head office and store staff you find in many companies' and together with the improved communication lines, has led to more direct contact between the stores and head office and has greatly improved the business.

Senior management consider the company applies quality management techniques and stated that 'we are continually listening, not only to our customers, but to staff, mystery shoppers and customer group forums'. Improving upward communication from stores to head office and from customers to designers, buyers and merchandisers, helps to improve the business.

In summary, both companies find that window display is important in attracting customers into the store and that men prefer to have products blocked rather than presented in co-ordinated ranges. Management at Next believe that merchandise should be presented hanging to improve visibility for the customer whereas Burton Menswear presents many lines folded, but acknowledge that some customers are hesitant in investigating folded stock. The main differences are in the significance put on media advertising; Burton Menswear using magazines which appeal to the younger brand aware male shopper and Next preferring to promote the brand via the Next Directory in women's magazines and TV advertising.

Strategies for internal communication are very different with Burton Menswear using a traditional hierarchical approach by communicating down the organisation to retail staff. In contrast, senior management at Next encourage retail staff to talk to relevant departments at head office to improve the total product and service provision to customers.

8.8 Future Developments

Burton Menswear is trying to re-position its stores. In the past, the company has pursued a strategy of product mark-downs. The aim now is to sell merchandise at full price for a longer duration. In March 1997, The Burton Group linked all its menswear brands to form a new retail concept called Style Union. Together with its in-house labels, these outlets also sell national brands, such as Ben Sherman shirts, not normally sold in Burton Menswear. The format is aimed at targeting the younger brand aware customer but, to date, these pilot stores are still on trial. The Burton Menswear holding company, Arcadia, were planning to open three additional Style Union outlets during 1998, although Chris Dawson, of Management Horizons, is of the opinion that the concept lacks purpose and the marketing strategy needs a clearer focus (Anon, 1997c).

Within Burton Menswear the ranges are being re-assessed and the view is that there will be 'three ranges: good, better and best'. The price sensitive shoppers will have a *good* basic range with keen price points, the *better* range will offer the customer extra features and the *best* range will offer slightly higher quality to the less price conscious consumer. Moreover, management is trying to change the image of the product by using different labels within separately defined departments each with their own image and environment.

Next plans to increase the average store size from 4,000 to 15,000 sq.ft. with larger stores occupying over 20,000 sq.ft. selling space. For example, the site purchased from Littlewoods on Oxford Circus will be their largest store with between 17,000 and 20,000 sq.ft.; the new Argyle street store in Glasgow will be 16,000 sq.ft. and the store planned for Buchanan Galleries in Glasgow is situated in a unit of 30,000 sq.ft. with a planned sales floor area of about 20,000 sq.ft. This will allow improved depth in the range to increase availability and make it possible to pilot smaller ranges designed for a particular sub-segment of customers. The marketing manager suggested that the purpose was to sell increased ranges and product options in greater depth and thereby increase stock availability to customers. New ranges could be golf or sportswear and be designed for merchandising on separate gondola units. The aim is to 'cater to our existing customers with a broader range for their particular needs than we used to do'. Additional ongoing developments are to set up franchise and partnership agreements in the Far East. Senior management at Next recognise that they do not possess the necessary local expertise to develop outlets outwith the UK.

Market research from accompanied shopping events, conducted on behalf of the company, has identified that the shopping patterns for menswear are changing. Young men now shop in groups behaving in ways which were traditionally the preserve of women. 'Shopping for the pleasure of it, swapping clothes, reading the press for fashion ideas and ringing their friends to discuss what they are planning to wear at night'. This viewpoint has also been confirmed by other research (Corporate Intelligence on Retailing, 1998; Woodruffe, 1998) and has implications for branding and merchandising. Loyalty has been developed from people who started to buy Next products in the 1980's, when Next was launched and presented a differentiated image on the high street. The group marketing research manager questioned whether today's youth, who will have started to shop in Next only recently, held the brand in the same esteem as the original customers.

8.9 Productivity Analysis

Retailers are under continuous pressure to satisfy investors expectations in terms of return on capital employed and dividend paid. The competition between retailers has increased the burden on managers to control budgets whilst optimising sales. Retailers and analysts often use standard ratios to compare performance and analyse productivity. The most prevalent of these are 'sales per employee' (George, 1966; Ward, 1973) and 'sales per square foot' (Alexander, 1995a) besides sales turnover, profit margin and stock turnover (FAME, 1998).

Productivity ratios for each of the five companies in the study vary (Table 8.3). For example, the highest sales turnover for 1996 for the five retailers, based on company accounts, was achieved by Next Retail Ltd; the highest profit margin by River Island and the lowest by Burton Menswear. The best stock turnover was gained by Top Man/Top Shop with Principles having the worst; best sales per full time employee equivalent was again accomplished by Next Retail Ltd. with Principles having the lowest. The highest profit per full time employee equivalent was again Next and Principles had the lowest; these results were replicated in sales per square foot.

Table 8. 3 Productivity ratios

	Sales turnover[a] (000)	Profit margin[a] %	Stock turnover [a]	Number of FTE[a]	Sales per FTE[a]	Profit per FTE[a]	Sales per square foot[b] (1994)
Burton Menswear[c]	224,270	2.10	8.86	4,252	52,745	1,108	294
Principles[c]	116,662	2.78	5.80	3,024	38,579	1,072	220
Top Man/Top Shop[c]	241,616	8.76	10.12	5,034	47,997	4,205	277
River Island[d]	285,451	13.18	9.15	6,763	42,208	5,563	288
Next Retail[e]	862,912	11.74	7.60	12,904	66,872	7,851	350

Source: [a] FAME (1998)
[b] Verdict (1994)
[c] Burton Group Financial Reports - year ending 08/96
[d] River Island Financial Report - year ending 12/96
[e] Next Retail Financial Report - year ending 01/97

In the annual results for 1996 Next Retail Ltd. increased group turnover by 22.3 per cent to £946.8 mn. compared with the preceding year, of which one third is attributed to Next for Men (Next, 1995). Sales space increased by seven per cent during this period (Corporate Intelligence, 1997d). In contrast, Burton Menswear achieved a turnover of £227 mn., a reduction of 1.8 per cent compared to the previous year; this was partly due to a small reduction in selling space (Burton, 1996; Corporate Intelligence, 1997d). Store numbers for the two companies were similar, but market share is increasing for Next for Men and reducing for Burton Menswear.

8.10 Conclusions

In summary, both retailers recognise that they are targeting customer groups which are becoming more fragmented in their taste and needs. Next's way of dealing with this is to have clearly targeted ranges to suit different customer groups whilst Burton Menswear desire 'to be all things to all people' and thereby allows this message become diffused.

There appears to be a polarisation within fashion retailing, between those companies targeting the more aspirational shoppers, who have high expectations of product quality, and those, at the lower end of the market focusing on cost driven strategies (Davis, 1997). Burton Menswear, by targeting a number of dissimilar client groups, is being squeezed by retailers with a clearer brand strategy and market position. Customers, whilst appreciative of the reasonable prices, do not regard purchases as being of high quality or of offering an aspirational image. Some customers are even embarrassed to carry the Burton Menswear carrier bag or to have the Burton Menswear label on their clothes.

The Next for Men label seems to have been developed successfully as a lifestyle statement. The image, the company projects, has been nurtured through the design and style of the product, the store environment and the service provided. Each adds real value in the eyes of the target customer (Moore, 1995). Next differs from Burton Menswear in four ways: they promote a single brand; they have an in-house design team responsible for the design direction of all products as opposed to a buying department; their products are positioned to be more fashion-led than Burton Menswear; and Next augments its brand with a higher quality service provision than their main competitors.

The results of this preliminary research confirm Next for Men as a successful retailer brand. The results also illustrate that the past product strategy at Burton Menswear is influencing its ability to respond to changes in the fashion market. The company's attempt to reposition itself and develop a reputation and image centred on augmented brand value is likely to take considerable time. As Gerald Ratner learnt, it takes a long time to build a reputation but you can lose it overnight.

In summary, by taking a holistic view of the qualitative interviews a number of critical success factors emerge, which are visible to or experienced by the customer:

1. Window and in store presentation.
2. Product perception.
3. Customer service.

These factors have a causal relationship with the following centrally controlled functions:

1. Buying and merchandising strategies;
2. Consistency and standard setting;
3. Company culture and employer-employee-customer attitude;
4. Human resource policies;
5. Investment in staff and management training;
6. Improved communication systems.

Customer perceptions of a retailer can be viewed as being the tip of the iceberg, that is to say the ten per cent of the company that is on view to the public such as the store environment, the product and the staff. The balance is unseen by customers, but affects their image perception and consequently the company financial results. This includes the operation of all centralised support functions and effects induced by company structure, communications systems, company policies and procedures and the way different support departments, such as sales; buying and merchandising; marketing; and human resource management interpret and implement these policies and procedures. The final chapter summarises the research findings and explores how fashion retailers can identify interrelated activities and implement strategies that may ensure successful market positioning.

CHAPTER NINE

DISCUSSION AND CONCLUSIONS

9.1 Introduction

The aim of this thesis was to explore the key issues influencing the perspectives of store image perceived by the consumer as a result of retailer store positioning strategies. In addition, the work examined how this information might be utilised by the retailer to direct marketing strategies. The qualitative and quantitative findings, which constitute the main body of the thesis, have been discussed in detail. The purpose of this chapter is to summarise the research findings and draw together the key conclusions. In the first section, the initial aims and objectives are reviewed and findings summarised and discussed in terms of their contribution to the extant literature. The implications of the findings are considered and future research directions highlighted.

The first three chapters revealed the complexity of the consumer decision process and the importance of image perception and highlighted a shortfall in research that specifically explored strategic choices in fashion retailing. Given that in the UK it is characterised by high levels of market concentration, centralisation and outlet standardisation, the discussion stressed a need to develop a clearer understanding of the relationship that contributed to store positioning.

The objectives of the thesis were:

- to identify the attributes or characteristics important to consumers in their choice of stores when purchasing menswear fashion clothing;

- to analyse the store image perceptions of consumers and retail employees for selected menswear fashion stores;
- to evaluate the importance of factors contributing to store choice;
- to explore retail strategies for market positioning;
- to develop a framework for successful market positioning.

This study has explored issues relating to consumer behaviour and attitude to store image in menswear fashion retailing. The first part of the primary research identified store image attributes important to consumers and served to address Objective One (Chapter Five). The outcome of Objective Two was discussed in Chapter Six by measuring customer and retailer perception of store image utilising the eight salient dimensions identified in the previous Chapter. To achieve the third objective, the four most important factors from the research were used to explore how store image dimensions interact in store choice decisions (Chapter Seven). Objective Four was achieved through key informant interviews that identified causal linkages between consumer perception and key marketing strategies (Chapter Eight). The causal connections highlighted the complexity of store positioning and consumer perception of store image. Changing conditions may alter retailer positioning and hence, project a different image in the eyes of their customers. This chapter aims to achieve the final objective of developing a framework for successful store positioning. Findings are discussed in terms of previous theories with a view to identifying particular issues related to fashion retailing.

9.2 Contribution to Knowledge

The exploratory phase of the research identified 15 store image dimensions contributing to store choice in menswear retailing. The findings confirm that all these factors have a strong influence on store choice. The identified dimensions are similar, but not identical to previous findings (Kunkel and Berry, 1968; Lindquist, 1974; Zimmer and Golden, 1988) and confirm Hansen and Deutscher's (1977) conclusions *that attributes important in store image formation and store choice vary between retail sectors.* Of the eight dimensions used for this research, the first four of merchandise price, quality, fashion and style, and merchandise selection are directly linked to product or branding strategies. Two other dimensions, the implementation of the refund and exchange policy and the service provided by staff, are linked to the human resource strategy. The implementation of the visual merchandising and store design strategy influence consumer perception of store layout. The final dimension of retailer reputation is more complex and has associations with all the noted dimensions and their implementation.

Eight salient attribute dimensions were included in the survey utilising a multi-attribute model (Doyle and Fenwick, 1974; Fishbein, 1967a). Analyses *indicated the precise mix of attributes to be different for retailers, not only between retail sectors but also within a sector.* Overall attitude measurement of the five retailers, demonstrated significant differences between stores. Arguably there is a relationship between image perceptions and market share, profit margin and sales turnover. Hence, it is essential for fashion retailers to identify the specific combination of image attributes demanded by their customers to ensure a strong image and effective market positioning.

Congruence of store choice evaluative criteria is considered to be important in optimising retail resources and, therefore, the second stage of the research explored the image perception of store employees. Results confirmed extant findings, that the overall image perception of retail employees was generally higher than that of their customers (McClure and Ryans, 1968; Osman, 1993; Pathak *et al.*, 1974), although closer scrutiny found congruence gaps to confirm Samli and Lincoln's (1989) findings that stress the importance of identifying differences in employee and customer image perception. *Thus retailers should take notice when the image perception of employees is lower than that of the customers on specific attributes.* Results indicated advantages for retailers who employ staff with a positive perception of the store, its products and the environment in which they work. *Findings also demonstrated a relationship between the propensity of staff to purchase goods from the store in which they work, and customer reaction to the product.* Thus, staff purchases can be an early indicator of consumer preference on new ranges and be used as a management control system.

The standard marketing response to heterogeneous markets is segmentation; one of the major contributions of marketing thought to modern business practice (Lockshin *et al.* 1997). Segmentation research helps retailers to identify behavioural differences within their customer target groups (Samli, 1989). Consumer levels of involvement with the buying decision vary even within fashion clothing purchases (Engel *et al.*, 1990; Laurent and Kapferer, 1985). This can range from being highly involved in the act of purchasing by seeking specific low risk brands with the right image, to being less involved in the selection of clothing and more conscious of price and value. Customer clusters have been found on the continuum between this dichotomy and it is important for retailers to understand the different levels of involvement within their targeted customer groups.

The study utilised conjoint analyses to explore how consumers made clothing purchase decisions and to illustrate sub-segmentation results for two retailers. Conjoint analyses illustrated how a number of store choice factors interact and highlighted opportunities by which retailers might tailor the product, the service or the store environment to suit individual sub-segments within the overall target group. *Both studies confirmed product quality as the prime factor for all sub-segments of customers when several factors had to be considered.* These customer groups judged the three other factors of merchandise price, selection, and service provided by staff to be of varying subsidiary significance in their store choice decisions. *Fashion retailers cannot satisfy the whole market, but should identify segments of smaller homogenous groups to which they can tailor their offer.*

Based on the information from a number of key informant interviews, the study proposed a schemata for successful store positioning which integrates marketing and human resource strategies and identifies that it is the way these strategies interact which is important. *These links suggest a connection between image perception by staff and customers and financial outcomes and are grounded in this complex interaction of the marketing and the human resource strategies.* It is this complexity that makes it difficult for retailers to maintain or strengthen their image reputation.

9.3 Model of Store Positioning

9.3.1 Philosophical underpinning of the model

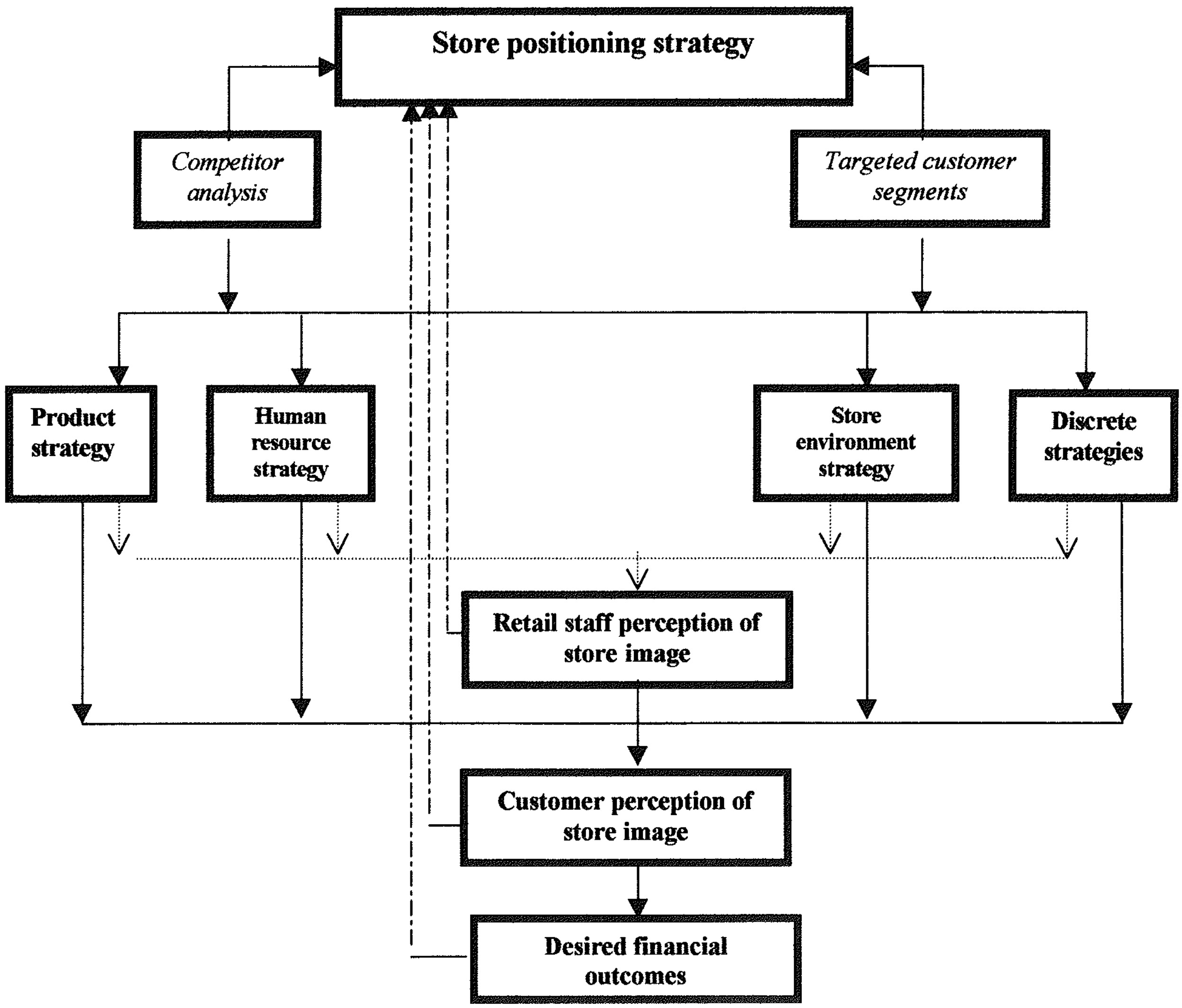
Sayer (1992) points out that events are a result of conditions, which have their original cause in the mechanisms within a situation, which in this context is the retail organisation. The abstract mechanisms are illustrated by the marketing communication modus operandi of four separate strategies: **product**, **customer service, store environment** and **discrete strategies**. These are all developed based on the outcome of the analysis of the **competitive environment** and the identification of **targeted customer groups**. The proposed schemata is a simplistic model supported by extant empirical research into store image and market positioning. The abstract conditions are the consequence of the strategy decisions, as the mechanisms contain powers or liabilities when activated. A positive or negative change in the events occurs when conditions interact with mechanisms (Table 9.1 and Figure 9.1).

Table 9.1 Framework for identifying causal linkages within retailer control

Mechanisms	Conditions within retailer control	Events
• Product strategy	• Branding strategy • Quality consistency • Price positioning • Product selection • Fashion and design constancy • Refund/exchange policy	• Increase in sales turnover • Increase in profitability • Increase in market share
• Customer service strategy	• Employment contracts - payment systems - staff benefits - ratio of f/t to p/t staff • Recruitment • Orientation • Staff development • Team work • Empowerment • Company structure • Company culture • Customer communication	• Increase in customer loyalty • Increase in transaction value • Increase in sales per FTE • Increase in sales per square foot • Improved staff retention • Improved staff perception of company
• Store environment strategy	• In-store layout - product presentation - window displays • Store design	• Increase in number of customers • Increase time spent in store
• Discrete strategies	• Location • Advertising and promotion • Opening hours	• Number of customers • Increased sales turnover

Thus, the Schematic Model of Successful Market Positioning is based on the four interacting strategies of Product, Customer Service, Store Environment and Discrete strategies. The latter strategy is based on issues which are not central to this study. Initially senior managers formulate strategies based on information about targeted customer groups and knowledge of the main competitors. In particular, the strengths and weakness of the competition provide opportunities for improving the company's position in the market. The retailer has then to decide how to position the company by examining all the contributing factors of each strategy.

Figure 9.1 Schemata for successful store positioning



9.3.2 Advantages of the schemata

Kunkel and Berry (1968) and Lindquist (1974) identified store image factors important for store positioning. However, their work did not explore how different store image factors interact in the mind of the consumer or how these factors influence the choice of store. Furthermore, the studies did not specifically examine fashion retailing, where store image incorporates symbolic connotations through lifestyle branding to attract customers by striving to satisfy their social aspirations (Fernie *et al.,* 1997; Lewis and Hawskley, 1990). Harris and Walters' (1992) model of store positioning, based on four overlapping circles of merchandise characteristics, trading format, customer service and customer communication, is proposed to be central to the competitive strategy of multiple retailers. The authors suggest the four factors interact to create the market positioning of a company and provide detailed flowcharts and descriptions for each contributing factor, many of which are confirmed by this study. Moreover, they link store positioning to critical success factors, such as sales revenue; gross profit and gross margin; and sales per square foot. However, the model does not integrate the human resource aspects to optimise the marketing strategy nor does it include customer or retail employee perception of store image as a feedback mechanism to inform the store positioning strategy (Harris and Walters, 1992; Walters, 1994).

Davies and Brooks (1989) used multi-dimensional scaling to model store positioning for a number of retail sectors. However, retail practitioners do not find these two or three dimensional maps easy to understand. Nevertheless, Davies and Brooks do note that image-led positioning is based on the three main factors of design, service and merchandise. The results presented in this thesis agree with Davies and Brooks findings that the main sector of fashion retailing utilise image-led strategies. However, the discount sector implements a cost driven strategy based on price led differentiation.

The store choice research undertaken by Arnold *et al.* (1997) in the food sector confirmed that differences in choice factors existed across sectors and in addition, identified that some variances occur within sectors. They identified the primary attributes in all sectors to be location, price and assortment and the secondary factors to be quality, service, value and sales promotions with the order in which these attributes are prioritised depending on the sector. However, in fashion retailing lifestyles and self-image determine the combination of attributes required by different customer segments.

9.3.3 Product strategy

This thesis has identified the most important characteristics of fashion clothing to be the product strategy defined as *product quality, price position, product selection*, and the *fashion and design* of the merchandise. These interacting attributes, which contribute to the image of a brand, are formulated from factors important or aspirational to the consumer (D'Arcy *et al.,* 1989). The points of difference influence customers in their purchase decision and encourage them to choose a particular product and even to pay a premium price (Evans, 1997). These findings differ from other sector research such as Lindquist (1974) and Arnold *et al.* (1997) in the order in which factors are prioritised.

Many respondents in the exploratory phase mentioned that ***branding*** was an important issue. From a retailer perspective this means the choice of selling either national or private label brands or a combination of both. Own labels also provides the fashion retailer with an intangible symbolic differentiator that is difficult to replicate (Moore, 1995). A strong retail image is ascribed to a clear and consistent brand communication strategy. In contrast, having a poor brand image can be historical, but can also be a result of a diffused brand strategy and lack of a consistent, recognisable house style. *The strongest source of differentiation between multiple specialist fashion retailers is the development of a strong, quality retail brand and this is in contrast to other retail sectors.*

Findings indicated that product quality was the most important factor to most consumers when they had to trade-off price against quality. From a retailer perspective ***consistency in product quality*** is essential as it takes a long time to rebuild a company reputation. The integrity of the retail brand comes from brand positioning and a consistency of value in terms of range, pricing and product quality (Wileman and Jary, 1997). This appears to agree with previous research findings.

Price is often seen as an indicator of quality and a high proportion of respondents pointed out that they would be prepared to pay more for a quality product. There is evidence that lower prices may infer a lower product quality. Recent research suggests that by augmenting the product and providing excellent service a company can charge more for the products (Cook, 1997).

Some consumers chose the retailer based on ***product selection.*** However, companies such as Next have become known for having a specialised edited range targeting a profiled customer. This finding contrasts clearly with supermarket and department store retailing where selection is the main factor in store choice (Lindquist, 1974).

The branding and buying strategy in a company is responsible for the ***fashion and design consistency***. Respondents did not assess the style and fashion of garments to be as important as quality and price, although design can be very distinctive and people who like a retailer style tend to become loyal customers. Some own brand companies are recognised as having a strong buying and design departments that maintain the style consistency of the product and give range planning high importance to ensure co-ordination. The importance of this factor varies with the age of the consumer and is more applicable to fashion and department store retailing than food retailing.

9.3.4 Customer service strategy

As competition has become more intense and retailers have realised that they cannot compete on price alone, hence, many companies have developed a strategy of providing superior customer care to differentiate their products and services. Extant research indicates that customer service is a combination of interacting factors. The basis for good or excellent service provision is founded in the company human resource policy and is the reaction to how individuals feel they are treated. Most issues within the customer service strategy have a causal link to the human resource policy of a company. ***Employment contracts, payment systems*** and ***staff benefits*** can be crucial in minimising staff turnover (Anon, 1998b; Cook, 1997), although not believed to be motivational factors, many companies insist that incentives and bonuses are the best method of maximising performance. Recent management philosophy suggests that employees demonstrate greater commitment to organisations when reward systems are based on business success rather than individual achievement (Bank, 1992; Choppin, 1997; Clutterbuck and Kernaghan, 1994; Cook, 1997; Richer, 1996).

Recruitment of front line staff should concentrate on people with qualities, such as friendliness, enthusiasm and common sense. Sales personnel make an immediate impression on customers and reinforce the image of the company. *This is particularly important in fashion retailing due to the high customer interaction in the sales process.*

Orientation or induction is vital to ensure the employee becomes part of the team and to ensure important issues such as health and safety, company procedures and product knowledge are covered. In reality some retailers find it difficult to provide with the necessary training. Companies which invest in ***staff development*** reap the benefit of a motivated and well trained flexible work force.

The ***ratio of full time to part-time staff*** differs between companies. This can result in skill gaps, de-motivation and problems in succession planning. However, when part-time and full time staff undertake the same training and receive the same staff benefits, these policies have been found to improve communication, motivation and ***teamwork*** and to minimise staff turnover. In fashion retailing, where the product range is constantly changing these issues are particularly important.

Many successful organisations have increased employee ***empowerment*** in terms of decision making at a tactical level, resulting in improved profitability (Broadbridge, 1998; Foy, 1993). Empowering staff can be effective in improving motivation and attitude and influence how staff perceive their own company. They then become advocates to the public. In addition, good two-way ***communication systems*** between customers, staff and head office encourages shared knowledge and enables company performance to be optimised. This link between personnel practices and financial results is confirmed by a study which suggests that companies implementing 'complementary' practices of incentive remuneration, job security, flexibility, employee communication systems, skills training and team working can increase productivity by up to eight per cent compared to firms with less systematic and structured human resource routines (Walsh, 1998).

Company structures can encourage decision making at the lowest level. In contrast, companies with tall hierarchical structures ensure that decisions are made at a higher management level and thus de-motivate front line staff, but do ensure a standard is kept in all outlets (Broadbridge, 1998). Decentralised control enables store managers to tailor merchandise to local requirements and can lead to increased staff morale.

Corporate values are very important in ensuring that employees at all levels perform well. Studies have found that organisations, which encourage teamwork and empowerment, are likely to achieve longer-term stability and growth and to increase horizontal and upward communication (Thomason, 1988).

This thesis differs from many other store image studies in that it highlights the interaction between the different contributors to the retail mix and proposes that service consistency is becoming ever more important, and hence should not be identified to be a discipline outwith the marketing sphere. *Marketing practitioners in all retail sectors confirm that customer service is becoming increasingly important as a differentiator. This is particularly so in the fashion sector where there is a high interaction between customers and staff.*

9.3.5 Store environment strategy

The exploratory consumer research identified ***in-store layout*** and ***product presentation*** as key factors of store choice. Store layout is similar for most fashion retailers although they may differ on product presentation. The density of stock is also important as lower density communicates a more exclusive offer.

Fashion retailers find the most important way of attracting customers to be the ***window displays,*** which present the retailer image. Good window displays provide co-ordination ideas for customers and bring the windows to life (Walters and Laffy, 1996).

Store design has never been more important to project and reinforce image and influence the purchase decision, but this will always be secondary to the product or brand strategy. The in-store layout was perceived by customers to be the least important dimension of the eight utilised in the second survey, but retail strategists see the design of a store, its layout and merchandise presentation as a strong competitive factor. Retailers have two methods of encouraging customers to re-evaluate the retail offer: a strong media advertising campaign or refits of stores. A new design incorporating different fixtures and fittings, lighting, colour and layouts can force consumers to reassess product quality, selection and service.

9.3.6 Discrete marketing strategies

The exploratory research phase identified additional dimensions important in store choice, including ***store location***, ***opening hours*** and ***advertising and promotions.*** For example, retailers decide how best to maintain positioning by reviewing store locations or by creating interest through media campaigns (Easey and Sorensen, 1995). While these factors influence consumer image perceptions, they are not discussed here as they are believed to be strategies outwith the scope of this research.

9.3.7 Focused store positioning

Customer segmentation and market positioning are closely linked. Store positioning is "the design and implementation of the retail mix to create an image of the retailer in the customer's mind relative to its competitors" (Levy and Weitz, 1998: 165). Jobber (1995) suggests that successful positioning is based on four concepts: a clearly communicated positioning to offer differential advantage; the message must be consistent; the brand must be credible to the target market; and in order to be competitive, the retailer needs to have a strong image to distinguish its brand from the competition. The apparent success some fashion retailers have achieved is attributed to the image and 'street cred' of the brand; the distinctive style and design of the merchandise; and typified by the number of people becoming advocates for these retailers.

9.3.8 Customer and retail staff perception of store image

Analysis of customer and retail staff perception of store image are useful feedback mechanisms for marketing practitioners. If both staff and customers perceive a retailer to have a strong image it will affect their intention to purchase. A reasonable customer perception and a poor staff opinion could be a problem indicator. In fashion retailing, staff inclination to purchase goods for own use or as presents can be tracked as an early signal of future sales pattern. Research indicates that staff would normally be expected to have a more positive evaluation than customers, when this is reversed it should be investigated and contributing factors minimised or eliminated before customer perception and company reputation are damaged.

9.3.9 Financial outcomes

The proposed schematic model concludes with the measurable results of the marketing strategy. A number of financial indicators can be used such as profit margin, market share, sales turnover, sales per square foot; sales per full time equivalent (FTE) and profit per

FTE. It is the trend in any of these indicators that should be noted and compared with the nearest competitors and the sector in general. If the trend is negative it should be investigated by working through the model; however, if the trend is positive, the model can also be used to identify the interaction leading to the change to enable it to be strengthened.

9.4 Implications of the Research

The marketplace is becoming increasingly similar in terms of products and store formats, but customer service is one method to differentiate outlets and provide added customer value. Moreover, it is more difficult to replicate than merchandise variables or price points and, hence, is the real differentiator between the multiple specialist fashion retailers.

The fashion market is fragmented and qualitative information about consumer response to products is important. By utilising a behavioural approach in identifying consumer preferences, management should discover priorities and be able to improve those components contributing towards consumer dissatisfaction. This reinforces the theory that both marketing and human resource strategies interact to present the retail mix, which is conceptualised as a holistic image in the mind of the customer. This level of abstraction can serve as a useful framework for a future marketing strategy.

This study confirms that for a brand to be successful, the company must offer a quality product, provide value for money and have a team of people that is a 'real' asset. In fashion retailing products occupy both a symbolic as well as a functional role and, as a consequence, there is an even greater need to understand the process and content of consumer perceptions. Such an understanding provides a basis for more effective market positioning. Consumer perception of a retail image is, therefore, a combination of the products innate characteristics and the environment in which it is presented. The success of the retail offer depends on how well this image meets targeted customers expectation.

9.5 Future Research

Recommendations for future research comprise issues for consideration in the short and medium to long term. Short-term issues are those which have arisen directly from the current study, and which due to time constraints were not addressed. These research projects relate to testing the schemata in both menswear and womenswear fashion retailing as well as identifying differences in consumer decision-making when purchasing menswear and womenswear. The medium to long term study could replicate the methods to identify regional differences and cultural differences. As retailers extend their geographical locations, one of the primary factors influencing marketing success or failure is the degree of acceptance by local consumer cultures. Hence, it is proposed that a study exploring consumer behaviour, not only in regional areas of the UK but also in other countries, would be central to a more developed understanding of retail marketing. In addition, conjoint studies could investigate the trade-offs consumers make by adding additional image dimensions to evaluate the extent further variables change the consumer decision outcomes and utilise results to measure the viability of customer sub-segments.

9.6 Conclusion

In conclusion this thesis has reported on the development of a schemata of successful store positioning for fashion retailers. The present study has increased understanding through a clarification of the complexity and the interrelationships existing among model variables. This model is deemed reliable for two important reasons. First, the methodological approach adopted in model development utilised triangulation. Model development was grounded in qualitative and quantitative insights and existing theory and statistical rigour was sought through empirical findings. Secondly, the large sample size of both the quantitative phases adds further validity to the model. The establishment of a schemata of successful store positioning strategies for fashion retailers, in a context where decision-making is complex and understandings are limited, serves to develop an improved comprehension of the way in which consumers and retailers make choices. Such insights into the mechanics of consumer decision-making are vital to retailers seeking to appeal to the middle market.

References

Aaker, D., and Biel, A. (1993). *Brand Equity and Advertising*. Hillsdale, NJ: Lawrence Erlbaum.

Ajzen, I., and Fishbein, M. (1980). *Understanding Attitudes and Predicting Social Behavior*. Englewood Cliffs, New Jersey: Prentice-Hall.

Akehurst, G. (1995). Concentration in Retail Distribution: Measurement and Significance. In G. Akehurst and N. Alexander (Eds.), *Retail Structure*. London: Frank Cass.

Akehurst, G., and Alexander, N. (Eds.). (1995). *Retail Structure*. London: Frank Cass.

Akhter, S. H., Andrews, J. C., and Durvasula, S. (1994). The Influence of Retail Store Environment on Brand-related Judgements. *Journal of Retailing and Consumer Services, 1*(2), 67-76.

Alexander, H. (1999, 7 July). Back-to-basics Collection Gives Marks New Spark. *Electronic Telegraph*, pp. 1503.

Alexander, N. (1995a). Contemporary Perspectives in Retail Development. In G. Akehurst and N. Alexander (Eds.), *Retail Structure* . London: Frank Cass.

Alexander, N. (1995b). Retailing Post - 1992. In G. Akehurst and N. Alexander (Eds.), *Retail Structure* . London: Frank Cass.

Alexander, N. (1997). *International Retailing*. Oxford: Blackwell.

Allport, F. W. (1935). Attitudes. In S. Murchinson (Ed.), *A Handbook of Social Psychology* (pp. 798-844). Worchester, Mass.: Clark University Press.

Alpert, M. I. (1971). Identification of Determinants Attributes: A Comparison of Methods. *Journal of Marketing Research, 8*(May), 184-191.

Amirani, S., and Gates, R. (1993). An Attribute-anchored Conjoint Approach to Measuring Store Image. *International Journal of Retail and Distribution Management, 21*(5), 30-39.

Anon. (1990, 4 April). Recession Coming? Ask the Consumer. *The New York Times*, pp. D6.

Anon. (1997a, 27 September). Next Grows Sportswear with Golf Line. *Drapers Record*, 3.

Anon. (1997b, 20 March). Next to Grow Overseas after Rise in Profits. *Drapers Record*, 9.

Anon. (1997c, 5 September). Style Union Chain to Double. *Retail Week*, 2.

Anon. (1998a, 13 June). Independent Clothing Retailers are Trading up. *Drapers Record*, 4.

Anon. (1998b, 15 April). Working Briefs: Staff Retention and Recruitment Highlighted in Surveys. *Financial Times*, pp. 33.

Anon. (1998c, 4 April). What the Brokers Say. *Daily Telegraph*, pp. B2.

Anon. (1999, 8 March). M&S Share of Clothing Market Falls Sharply. *Electronic Telegraph*, pp. Issue 1382.

Arnold, A. and McLean, M. (1998) Customer Service: Focus Groups with Sales Staff (Unpublished Report - Glasgow Caledonian University).

Arnold, S. J., Oum, T. E., and Tigert, D. J. (1983). Determinant Attributes in Retail Patronage: Seasonal, Temporal, Regional, and International Comparisons. *Journal of Marketing Research, 20*(May), 149-157.

Arnold, S. J., Tigert, D. J., and Handelman, J. M. (1997). *Competitive Market Structure Differentiation and Store Choice Attribute Determinacy*. Paper presented at the Retailing: End of a Century and a Look to the Future, St. Louis, Missouri.

Assael, H. (1998). *Consumer Behavior and Marketing Action*. (6 ed.). Cincinnati, Ohio: South-Western College Publishing.

Astrop, V. (1997, 3 May). Next to launch NX Women's Sportwear via Catalogue. *Drapers Record*, 3.

Atkinson, S. (1995). Designing and Marketing Fashion Products. In M. Easey (Ed.), *Fashion Marketing* (pp. 107-133). Oxford: Blackwell Science.

Bagozzi, R. P. (1994) *Principles of Marketing Research*, Cambridge, Mass., Blackwell.

Baker, J., Grewal, D., and Parasuraman, A. (1994). The Influence of Store Environment on Quality Inferences and Store Image. *Journal of the Academy of Marketing Science, 22*(4), 328-339.

Baker, M. J. (Ed.). (1984). *Macmillan Dictionary of Marketing and Advertising*. London: Macmillan.

Baker, M. J. (Ed.) (1999) *The Marketing Book,* Oxford:Butterworth-Heinemann.

Bank, J. (1992). *The Essence of Total Quality Management.* Hemel Hempstead: Prentice Hall.

Baron, R. A., and Byrne, D. (1987). *Social Psychology: Understanding Human Interaction.* (Fifth ed.). Boston: Allyn and Bacon.

Bass, F. M., and Talarzyk, W. W. (1972). An Attitude Model for the Study of Brand Preference. *Journal of Marketing Research, 9*(February), 93-96.

Bass, F. M. and Wilkie, W. L. (1973) A Comparative Analysis of Attitudinal Predictions of Brand Preference. *Journal of Marketing Research,* 10(August), 262-69.

Bearden, W. D., and Woodside, A. G. (1976). Commentaries on Belk, 'Situational Variables and Consumer Behaviour'. *Journal of Consumer Research, 2*(December), 165.

Bearden, W. O. (1977). Determinant Attributes of Store Patronage: Downtown Versus Outlying Shopping Centres. *Journal of Retailing, 53*(Summer), 15-22,92,96.

Beatty, S. E., Mayer, M., Coleman, J. E., Reynolds, K. E., and Lee, J. (1996). Customer-Sales Associate Retail Relationships. *Journal of Retailing, 72*(3), 223-247.

Bechhofer, F. (1974). Current Approaches to Empirical Research: Some Central Ideas. In J. Rex (Ed.), *Approaches to Sociology* . London: Routledge.

Beck, K.W. (1985), Modernism and Fashion: A Social Psychological Interpretation, in *The Psychology of Fashion*, M. Solomon, Ed. Lexington, MA: Lexington Book.

Belk, W. R. (1974). An Exploratory Assessment of Situational Effect in Buying Behaviour. *Journal of Marketing Research, 11*(May), 156-163.

Bellenger, D., Robertson, D., and Hirschman, E. (1978). Impulse Buying Varies by Product. *Journal of Advertising Research, 18*(Dec.), 15-18.

Bellenger, D. N., Steinberg, E., and Stanton, W. W. (1976). The Congruence of Store Image and Self Image, As it Relates to Store Loyalty. *Journal of Retailing, 52*(1), 17-32.

Bennett, R. (1991). How Is Management Research Carried Out? In N. C. Smith and P. Dainty (Eds.), *The Management Research Handbook* . London: Routledge.

Benton, T. (1977). *Philosophical Foundations of the Three Sociologies.* London: Routledge and Kegan Paul.

Berelson, B. (1952). *Content Analysis in Communication Research.* Glencoe, Ill.: Free Press.

Bernoth, A. (1997, 9 February). River Island Awaits Return of its High Street Fashion Visionary. *Sunday Times*, pp. 3.

Berry, L. L. (1968). *The Components of Department Store Image: A Study of Three Selected Department Store in Phoenix, Arizona.* Unpublished Unpublished D.B.A. Dissertation, Arizona State University, Tempe.

Berry, L. L. (1969). The Components of Department Store Image: A Theoretical and Empirical Analysis. *Journal of Retailing, 45*(Spring), 3-20.

Best, S., and Kellner, D. (1991). *Postmodern Theory: Critical Interrogations.* London: Macmillan.

Bhat, S., and Reddy, S. K. (1998). Symbolic and Functional Positioning of Brands. *Journal of Consumer Marketing, 15*(1).

Bitner, M. J., Booms, B. H., and Mohr, L. A. (1994). Critical Service Encounters: The Employee's Viewpoint. *Journal of Marketing, 58*(October), 95-106.

Blawatt, K. (1995). Imagery. *Journal of Retailing and Consumer Services, 2*(2), 83-96.

Bloemer, J., and de Ruyter, K. (1998). On the Relationship between Store Image, Store Satisfaction and Store Loyalty. *European Journal of Marketing, 32*(5/6), 499-513.
Boedeker, M. (1995). New-type and Traditional Shoppers: A Comparison of Two Major Consumer Groups. *International Journal of Retail and Distribution Management, 23*(3), 17-26.
Bonfield, E. H. (1974). Attitude, Social Influence, Personal Norms and Intentions Interactions as Related to Brand Purchase Behavior. *Journal of Marketing Research, 11*, 379-89.
Boshoff, C., and Mels, G. (1995). A Causal Model to Evaluate the Relationships among Supervision, Role Stress, Organizational Commitment and Internal Service Quality. *European Journal of Marketing, 29*(2), 23-42.
Bowers, K. S. (1973). Situationism in Psychology: An Analysis and a Critique. *Psychological Review, 80*(September), 307-36.
Bray, L. (1997, 8 November). Room for Manoeuvre. *The Grocer*, 41.
Bretton-Clark. (1990). *Conjoint Designer, Version 3.* Morristown, NJ.
Bretton-Clark. (1992). *Conjoint Analyzer, Version 3.* Morristown, NJ.
Bretton-Clark. (1993). *Conjoint Segmenter.* (3 ed.). Morristown, NJ.
Britton, R. (1997) Interview with The Marketing Communications Manager, Burton Group, London, 4 June.
Broadbridge, A. (1996a). *Distribute Trades Profile: A Statistical Digest.* Stirling: Institute for Retail Studies, University of Stirling.
Broadbridge, A. (1996b). Female and Male Managers - Equal Progression? *The International Review of Retail, Distribution and Consumer Research, 6*(3), 259-279.
Broadbridge, A. (1998). Barriers in the Career Progression of Retail Managers. *The International Review of Retail, Distribution and Consumer Research, 8*(1), 53-78.
Broadbridge, A., and Davies, K. (1993). Management Education at a Distance and its Effect on career Progression: The Case of MBA in Retailing and Wholesaling Students. *Distance Education, 14*(1), 6-26.
Bromley, R. D. F., and Thomas, C. J. (1993). Retail Change: Retrospect and Prospect. In R. D. F. Bromley and C. J. Thomas (Eds.), *Retail Change, Contemporary Issues* (pp. 247-258). London: UCL Press.
Brown, S. (1995a). An Integrated Approach to Retail Change: The Multi-Polarisation Model. In G. Akehurst and N. Alexander (Eds.), *Retail Structure* . London: Frank Cass.
Brown, S. (1995b). *Postmodern Marketing.* London: Routledge.
Bruce, M., and Cooper, R. (Eds.). (1997). *Marketing and Design Management.* London: International Thomson Business Press.
Bruner, E. M. (1986). Experience and Its Expressions. In V. W. Turner and E. M. Bruner (Eds.), *The Anthropology of Experience* (pp. 3-30). Urbana, Ill.: University of Illinois Press.
Bryman, A. (Ed.). (1988). *Doing Research in Organizations.* London: Routledge.
Bubb, N. (1992). Retailing and the City. In D. Ricketts (Ed.), *Risk and Opportunities in Retailing in the 1990's* (pp. 161-172). London: Newman Books.
Burke, M. C., and Berry, L. L. (1974). Do Social Actions of a Corporation Influence Store Image and Profit? *Journal of Retailing, 50*(Winter), 63-72.
Burrell, G., and Morgan, G. (1979). *Sociological Paradigms and Organisational Analysis.* London: Heinemann.
Burton. (1995). *Retail Handbook: A Guide to Your Employment within the Burton Group;* London.
Burton. (1996). *Review 96* (Report and Accounts). London: The Burton Group PLC.
Buzzell, R. D., and Gale, B. T. (1987). *The PIMS Principle.* New York: Free Press.

Cassill, N. L., Williamson, N. C., McEnally, M., and Thomas, J. (1993). Intratype Competition among Department Stores. *International Review of Retail, Distribution and Consumer Research, 3*(1), 65-78.

Chisnall, P. M. (1985). *Marketing: A Behavioural Analysis.* (2 ed.). Maidenhead, Berkshire: McGraw-Hill.

Chisnall, P. M. (1997). *Marketing Research.* (5 ed.). London: McGraw-Hill.

Choppin, J. (1997). *Total Quality Through People: A Blueprint for Proactive Total Quality Management.* Leighton Buzzard: Rushmere Wynne.

Christopher, M. (1992). *Logistics and Supply Chain Management.* London: Pitman.

Cicourel, A. V. (1981). Notes on the Integration of Micro and Macro Levels of Analysis. In K. Knorr-Cetina and A. V. Cicourel (Eds.), *Advances in Social Theory and Methodology: Towards and Integration of Micro- and Macro-sociologies* . London: Routledge and Kegan Paul.

Clark, A. (1998, 26 June). Next Drops Stores for Franchises Overseas. *Daily Telegraph*, pp. 32.

Clover, V. T., and Balsley, H. (1979). *Business Research Methods.* (Second edition ed.): Grid Publishing.

Clutterbuck, D., and Kernaghan, S. (1994). *The Power of Empowerment: Release the Hidden Talents of your Employees.* London: Kogan Page.

Cobb, C. J., and Hoyer, W. D. (1986). Planned Versus Impulse Purchase Behavior. *Journal of Retailing, 62*(4), 384-409.

Cochran, W. G., and Cox, G. M. (1950). *Experimental Designs.* New York: John Wiley and Sons.

Collins (1991), *The New Collins Dictionary and Thesaurus.* Glasgow: Harper Collins.

Constantino, M. (1998) *Fashion Marketing and PR,* London: BT Batsford.

Cook, S. (1997). *Customer Care.* (2 ed.). London: Kogan Page.

Cook, S., and Macaulay, S. (1997). Customer Service: What's a Smile Got to do with it? *Managing Service Quality, 7*(5), 248-252.

Corporate Intelligence. (1996). *Burton* (Retail Trade Review 38). London: Corporate Intelligence.

Corporate Intelligence. (1997a). *Men's Outerwear, Part 3: Suits* (Retail Business 468). London.

Corporate Intelligence. (1997b). *Men's Outerwear, Part 4: Shirts* (Retail Business 469). London.

Corporate Intelligence. (1997c). *Men's Outerwear, Part 5: Trousers* (Retail Business 471). London.

Corporate Intelligence. (1997d). *Sector Analysis: Clothing and Footwear Retailers* (UK Retail Report 81). London.

Corporate Intelligence. (1998). *UK Retail Report* (UK Retail Report 89). London: Corporate Intelligence.

Corporate Intelligence on Retailing. (1998). *Strategic Issues in Retailing - An Aide Memoire for Management* . London: Corporate Intelligence.

Cort, S. G., and Dominguez, L. V. (1977). Cross Shopping as Incremental Business in Concentric Growth Strategies. *Journal of Retailing, 53*(Winter), 3-16, 96.

Crosby, P. B. (1980). *Quality is Free: The Art of Making Quality Certain.* New York: Mentor.

Crouch, S., and Housden, M. (1996). *Marketing Research for Managers.* Oxford: Butterwoth-Heinemann.

Cunningham, I., Hyman, J., and Baldry, C. (1996). Empowerment: The Power to do What? *Industrial Relations Journal*, 143-153.

Cunningham, S. (1998a, 28 March). Criticism Acts as a Spur to Chief as Next Loses Fashionable Tag. *The Times - Business News*, pp. 30.

Cunningham, S. (1998b, 27 March). Next Star Wanes in Wake of Profit Warning. *The Times - Business News*, pp. 34.

Dabhlokar, P. A. (1994). Incorporating Choice into an Attitudinal Framework: Analyzing Models of Mental Comparison Processes. *Journal of Consumer Research, 21*(June), 100-118.

Danneels, E. (1996). Market Segmentation: Normative Model Versus Business Reality. *European Journal of Marketing, 30*(6), 36-51.

D'Arcy, Masius, Benton, and Bowles. (1989). *Marketing*. London: Mercury Books.

Darden, W. R., and Ashton, D. (1974). Psychographic Profiles of Patronage Preference Groups. *Journal of Retailing, 50*(4), 99-112.

Darden, W. R., and Reynolds, F. D. (1972). Predicting Opinion Leadership for Men's Apparel Fashions. *Journal of Marketing Research, 9*(3), 324-328.

Davidson, J. (1998, 21 January). Streets Paved with Style. *The Herald*, pp. 14.

Davidson, W. R., and Doody, A. (1966). *Retailing Management*. New York: Ronald Press.

Davies, G. (1992a). Positioning, Image and the Marketing of Multiple Retailers. *The International Review of Retail, Distribution and Consumer Research, 2*(1), 13-34.

Davies, G. (1992b). The Two Ways in Which Retailers Can Be Brands. *International Journal of Retail and Distribution Management, 20*(2), 24-34.

Davies, G., and Liu, H. (1995). The Retailer's Marketing Mix and Commercial Performance. *International Review of Retail, Distribution and Consumer Research, 5*(2), 147-65.

Davies, G. J., and Brooks, J. M. (1989). *Positioning Strategy in Retailing*. London: Paul Chapman.

Davies, R., and Finney, M. (1998). Retailers Rush to Capture New Markets. *Financial Times, Mastering Global Business*, pp. 2.

Davis, F. (1985), Clothing and Fashion as Communication, in *The Psychology of Fashion*, M. Solomon, Ed. Lexington, MA: Lexington Book.

Davis, G. (1997). Mainstream Fashion at Mercy of Small Fry. *Retail Week, October 3*, 6.

Dawson, J. (1995). Retail Trends in Scotland: A Review. *International Journal of Retail and Distribution Management, 23*(10), 4-20.

Dawson, J. A. (1993). The Internationalization of Retailing. In R. D. F. Bromley and C. J. Thomas (Eds.), *Retail Change, Contemporary Issues* (pp. 15-40). London: UCL Press.

Dawson, J. A., and Broadbridge, A. M. (1988). *Retailing in Scotland in 2005*. Stirling: IRS, University of Stirling.

de Chernatony, L., Knox, S., and Chedgey, M. (1994). Brand Pricing in a Recession. In M. Jenkins and S. Knox (Eds.), *Advances in Consumer Marketing* (pp. 100-115). London: Kogan Page.

de Chernatony, L., and McDonald, M. H. B. (1992). *Creating Powerful Brands*. Oxford: Butterworth-Heinemann.

Demming, W. E. (1944). On Errors in Surveys. *American Sociological Review, 19*, 395-69.

Denzin, N. K. (1989a). *Interpretive Interactionism*. (Vol. 16). Newbury Park, Calif.: Sage.

Denzin, N. K. (1989b). *The Research Act: A Theoretical Introduction to Sociological Methods*. (Third ed.). Englewood Cliffs, New Jersey: Prentice Hall.

Dewey, J. (1910). *How We Think*. New York: Heath.

Diamantopoulos, A., and Schlegelmilch, B. B. (1997). *Taking the Fear out of Data Analysis*. London: The Dryden Press.

Dibb, S., Simpkin, L., Pride, W. M., and Ferrell, O. C. (1994). *Marketing: Concepts and Strategies*. (Second European Edition ed.). Boston: Houghton Mifflin.

Dichter, Ernest (1985), Why We Dress the Way We Do, in *The Psychology of Fashion,* Michael R. Solomon, Ed. Lexington, Mass.: Lexington Books.
Dickson, J., and Albaum, G. (1977). A Method of Developing Tailor-made Semantic Differentials for Specific Marketing Content Areas. *Journal of Marketing Research, 14*(February), 87-91.
Dodds, W., Monroe, K., and Grewal, D. (1991). Effects of Price, Brand, and Store Information on Buyers' Product Evaluations. *Journal of Marketing Research, 28*(August), 307-319.
Donovan, R. J., Rossiter, J. R., Marcoolyn, G., and Nesdale, A. (1994). Store Atmosphere and Purchasing Behavior. *Journal of Retailing, 70*(3), 283-294.
Dooling, B. (2001) Role of Creativity in Store Design, The New Retail Landscape, Retail Week Conference, London.
Doyle, P. (1991). Branding. In M. J. Baker (Ed.), *The Marketing Book* (2 Eds.): Butterworth-Heineman.
Doyle, P. (1994). *Marketing Management and Strategy*. Hemel Hempstead: Prentice Hall.
Doyle, P., and Fenwick, I. (1974). How Store Image Affects Shopping Habits in Grocery Chains. *Journal of Retailing, 50*(4), 39-52.
Drew, W., and Dallanegra, F. (1995, 6 July). Menswear Gains Ground on Womenswear Sector. *Fashion Weekly, 1848*, 3.
Duffin, D. (1997). Winning customer Ownership - The Jaeger Service Excellence Story. *Managing Service Quality, 7*(2), 80-86.
Du Gay, P. (1996). *Consumption and Identity at Work*. London: Sage.
Duster, T. (1981). Intermediate Steps between Micro and Macro Integration. In K. Knorr-Cetina and A. V. Cicourel (Eds.), *Advances in Social Theory and Methodology: Towards an Integration of Micro- and Macro-sociologies* . London: Routledge and Kegan Paul.
Easey, M. (Ed.). (1995). *Fashion Marketing*. Oxford: Blackwell Science.
Easey, M., and Sorensen, C. (1995). Segmentation and the Marketing Mix. In M. Easey (Ed.), *Fashion Marketing* (pp. 95-106). Oxford: Blackwell Science.
East, R. (1990). *Changing Consumer Behaviour*. London: Cassell Educational.
Easterby-Smith, M., Thorpe, R., and Lowe, A. (1991). *Management Research: An Introduction*. London: Sage.
Ehrenberg, A. S. C. (1972). *Repeat Buying*. Amsterdam: North Holland.
Ehrenberg, A. S. C. (1988). *Repeat-Buying: Facts, Theory and Applications*. London: Charles Griffing and Company.
Elliott, R. (1994). Exploring the Symbolic Meaning of Brands. *British Journal of Management, 5*(Special Issue, June), S13-S19.
Ellis, B., and Kelly, S. W. (1992). Competitive Advantage in Retailing. *The International Review of Retail, Distribution and Consumer Research, 2*(4), 381-96.
Employment-Gazette. (1997). *Regional Marketing Pocket Book* . London: The Advertising Association, NTC Publications.
Engel, J., and Blackwell, R. D. (1982). *Consumer Behavior*. (Fourth ed.). New York: The Dryden Press.
Engel, J., Blackwell, R. D., & Kollat, D. T. (1978). *Consumer Behavior*. (3 ed.). New York: Holt, Rinehart and Winston Inc.
Engel, J. F., Blackwell, R. D., and Miniard, P. W. (1990). *Consumer Behavior*. (6 ed.). Orlando: The Dryden Press.
Evans, M. (1989). Consumer Behaviour towards Fashion. *European Journal of Marketing, 23*(1), 63-69.
Evans, M. (1997, 16 May). Brand of Hope and Glory. *Retail Week*, 33.

Evans, M. (1999) In *The Marketing Book* (Ed, Baker, M. J.) Oxford: Butterworth-Heinemann.

Evans, M. J., Moutinho, L., and Raaij, W. F. V. (1996). *Applied Consumer Behaviour*. Harlow: Addison-Wesley.

Evans, R. J. (1995). Quality versus Cost - Lessons for the late 1990s. *Managing Service Quality, 5*(1), 6-10.

Evered, R., and Louis, M. R. (1991). Alternative Perspectives in the Organizational Sciences: 'Inquiry from the Inside' and 'Inquiry from the Outside'. In N. C. Smith and P. Dainty (Eds.), *The Management Research Handbook* (pp. 7-22). London: Routledge.

FAME. (1998). Company Reports.

Farley, J. U., and Ring, L. W. (1970). An Empirical Test of the Howard-Sheth Model of Buyer Behavior. *Journal of Marketing Research, 7*, 427-438.

Faurschou, G. (1990). Obsolescence and Desire: Fashion and the Commodity Form. In H. J. Silverman (Ed.), *Postmodernism - Philosophy and the Arts* (pp. 234-259). New York: Routledge.

Fernie, J. (1998). The Breaking of the Fourth wave: Recent Out-of-town Retail Developments in Britain. *The International Review of Retail, Distribution and Consumer Research, 8*(3), 303-317.

Fernie, J., Moore, C., Lawrie, A., and Hallsworth, A. (1997). The Internationalization of the High Fashion Brand: The Case of Central London. *Journal of Product and Brand Management, 6*(6), 151-162.

Fernie, J., and Woolven, J. (1995). The Scottish Grocery Market: An Overview. *International Journal of Retail and Distribution Management, 23*(10), 21-27.

Fielding, N. G., and Fielding, J. L. (1986). *Linking Data*. Newbury Park, Calif.: Sage.

Firat, A. F., and Shultz II, C. J. (1997). From Segmentation to Fragmentation: Markets and Marketing Strategy in the Postmodern Era. *European Journal of Marketing, 31*(3/4), 187-207.

Fishbein, M. (1963). An Investigation of the Relationships between Beliefs about an Object and the Attitude toward the Object. *Human Relations, 16*, 233-40.

Fishbein, M. (1967a). Attitude and the Prediction of Behavior. In M. Fishbein (Ed.), *Reasons in Attitude Theory and Measurement* . New York: John Wiley and Sons.

Fishbein, M. (1967b). A Behavioral Theory Approach to the Relations between Beliefs about an Object and the Attitude toward the Object. In M. Fishbein (Ed.), *Readings in Attitude Theory and Measurement* (pp. 389-400). New York: John Wiley and Sons.

Fishbein, M. (1967c). A Consideration of Beliefs and Their Role in Attitude Measurement. In M. Fishbein (Ed.), *Readings in Attitude Theory and Measurement* (pp. 256-66). New York: John Wiley and Sons.

Fishbein, M. (1983). An Investigation of the Relationships between Beliefs about an Object and the Attitude towards that Object. *Human Relations, 16*, 233-39.

Fishbein, M., and Ajzen, A. (1975). *Belief, Attitude, Intentions and Behavior: an Introduction to Theory and Research*. Reading, MA: Addison-Wesley.

Fishbein, M., and Raven, B. H. (1962). The AB-scales: An Operational Definition of Belief and Attitude. *Human relations*, 15.

Fitch, R., and Woudhuysen, J. (1987). The Strategic Significance of Design. In E. McFadyen (Ed.), *The Changing Face of British Retailing* (pp. 14-21). London: Newman Books.

Forty, A. (1989). *Object of Desire, Design and Society*. London: Thames and Hudson.

Foxall, G. R. (1980). Marketing Models of Buyer Behaviour: A Critical View. *European Research, September*, 1995-206.

Foxall, G. R. (1983). *Consumer Choice*. London: Macmillan.

Foxall, G. R. (1984). Consumers' Intentions and Behaviour. *Journal of the Market Research Society, 26*, 231-241.

Foxall, G. R. (1991). Consumer Behaviour. In M. J. Baker (Ed.), *The Marketing Book* (pp. 128-150). Oxford: Butterworth-Heinemann.

Foxall, G. R., and Goldsmith, R. E. (1994). *Consumer Psychology for Marketing*. London: Routledge.

Foxe, D. (1998, 28/29 March). How New Man Lost His Fear and Learnt to Love Style. *Financial Times*, pp. XI.

Foy, N. (1993). *Empowering People at Work*. Aldershot: Gower.

Freathy, P. (1992). *The Use of Realist Philosophy as a Methodological Research Framework in the Social Sciences*. (Vol. 29). Tokyo: Society of Business and Commerce, Keio University.

Freathy, P., and Sparks, L. (1995). Flexibility, Labour Segmentation and retail Superstore Managers: The Effects of Sunday Trading. *The International Review of Retail, Distribution and Consumer Research, 5*(3), 361-385.

Freathy, P., and Sparks, L. (1996). Understanding Retail Employment. In N. Wrigley and M. Lowe (Eds.), *Retailing, Consumption and Capital: Towards the New Retail Geography* (pp. 178-195). Harlow: Longman.

Gale, B. T., and Klavans, R. (1985). Formulating a Quality Improvement Strategy. *Journal of Business Strategy, 5*(Winter), 21-32.

Gardner, C., and Sheppard, J. (1989). *Consuming Passion: the Rise of Retail Culture*. London: Unwin Hyman.

George, K. D. (1966). *Productivity in Distribution*. London: Cambridge University Press.

Gergen, K. (1992). Organization Theory in the Postmodern Era. In M. Reed and M. Hughes (Eds.), *Rethinking Organization* (pp. 207-26). London: Sage.

Giddens, A. (1976). *New Rules of Sociological Method*. London: Hutchinson.

Gill, J., and Johnson, P. (1991). *Research Methods for Managers*. London: Paul Chapman Publishing.

Glaser, B. G., and Strauss, A. L. (1967). *The Discovery of Grounded Theory*. Chicago: Aldine.

Golden, L. L., Albaum, G., and Zimmer, M. (1987). The Numerical Comparative Scale: An Economical Format for Retail Image Measurement. *Journal of Retailing, 63*(4), 393-410.

Goldsmith, R.E., J.R. Heitmeyer, and E.B. Goldsmith (1990), Social Values and Being Well Dressed, *Perceptual and Motor Skills*, 70, 1010.

Gould, G. (1995). Why it is Customer Loyalty that Counts (And How to Measure It). *Managing Service Quality, 5*(1), 15-19.

Green, P. E. (1977). A New Approach to Market Segmentation. *Business Horizons, 20*(1), 66-73.

Green, P. E., and Desarbo, W. S. (1978). Additive Decomposition of Perceptions Data via Conjoint Analysis. *Journal of Consumer Research, 5*(June), 58-65.

Green, P. E., Krieger, A. M. and Carroll, J. D. (1987) Conjoint Analysis and Multidimensional Scaling: A Complementary Approach, *Journal of Advertising Research*, October.November, 21-27.

Green, P. E., and Srinivasan, V. (1978). Conjoint Analysis in Consumer Research: Issues and Outlook. *Journal of Consumer Research, 5*(September), 103-123.

Green, P. E., and Wind, Y. (1975). New Way to Measure Consumers' Judgements. *Harvard Business Review, 53*(4), 107-115.

Greenberg, C. J., Sherman, E., and Schiffman, L. G. (1983). The Measurement of Fashion Image as a Determinant of Store Patronage. In W. R. Darden and R. F. Lusch (Eds.), *Patronage Behavior and Retail Management* . New York: Elsevier Science.

Greenley, G. E., and Shipley, D. (1987). Problems Confronting UK Retailing Organizations. *Services Industries Journal, 7*(3), 353-364.

Greenley, G. E., and Shipley, D. (1988). An Empirical Overview of Marketing by JK Retailing Organizations. *Service Industries Journal, 8*(1), 50-66.

Greenley, G. E., and Shipley, D. (1992). A Comparative Study of Operational Marketing Practices among British Department Stores and Supermarkets. *European Journal of Marketing, 26*(5), 22-35.

Gummesson, E. (1993). *Qualitative Methods in Management Research*. London: Sage.

Habermas, J. (1974). *Theory and Practice*. London: Heinemann.

Hair, J. F., Anderson, R. E., Tatham, R. L., and Black, W. C. (1995). *Multivariate Data Analysis with Readings*. (4 ed.). Englewood Cliffs, New Jersey: Prentice Hall.

Hair, J. F. J., and Anderson, R. E. (1985). *Multivariate Data Analysis with Readings*. (2 ed.): Macmillan.

Hall, L. (1997a, 22 November). Restructuring Adds up for Burton. *Drapers Record*, 12-13.

Hall, L. (1997b, 20 December). Top Man's Loss is Top Shop's Gain. *Drapers Record*, 5.

Hammersley, M. (1992). *What's Wrong with Ethnography?* London: Routledge.

Hammersley, M., and Atkinson, P. (1983). *Ethnography: Principles in Practice*. London: Tavistock.

Handy, C. (1989). *The Age of Unreason*. London: Business Books.

Hansen, R. A., and Deutscher, T. (1977). An Empirical Investigation of Attribute Importance in Retail Store Selection. *Journal of Retailing, Vol. 53*(No. 4, Winter), 59-72,95.

Harris, D. and Walters, D. (1992) *Retail Operations Management - A Strategic Approach,* Hemel Hempstead: Prentice Hall.

Harverson, P. (1998, 17 March). Relegating Less Active Sectors. *Financial Times, Survey*, pp. 3.

Healey & Baker. (1985). *Retail Report* (The Retail Image). London.

Henwood, K. L., and Pidgeon, N. F. (1993). Qualitative Research and Psychological Theorizing. In M. Hammersley (Ed.), *Social Research: Philosophy, Politics and Practice* (pp. 14-32). London: Sage.

Hines, T. (1995). Strategies for Supply Chain Management. *Journal of clothing Technology and Management, Special Edition*, 96-112.

Hirschman, E. C. (1979). Intratype Competition Among Department Stores. *Journal of Retailing, 55*(4), 20-34.

Hirschman, E. C., Greenberg, B., and Robertson, D. (1978). The Intermarket Reliabilitiy of Retail Image Research: An Empirical Examination. *Journal of Retailing, 54*(1), 3-12.

Hirschman, E. C., and Holbrook, M. B. (1982). Hedonic Consumption: Emerging Concepts, Methods, and Propositions. *Journal of Marketing, 46*(Summer), 92-101.

Hite, R. E., and Bellizzi, J. A. (1985). The Psychological Relationship between Self-Image, Product Image, and Store Image with Regard to Retailing. *Mid-South Business Journal, 5*, 7-11.

HMSO. (1991). *Inside Britain*. London: The Foreign and Commonwealth Office.

Holbrook, M. B. (1974). A Synthesis of the Empirical Studies. In J. U. Farley, J. a. Howard, and W. L. Ring (Eds.), *Consumer Behavior: Theory and Applications* . Boston: Allyn and Bacon.

Hollander, S. C. (1960). The Wheel of Retailing. *Journal of Marketing, 24*, 37-42..

Holman, R. (1981). Apparel as Communication. In E. Hirschman and M. Holbrook (Eds.), *Symbolic Consumer Behavior* (pp. 7-15). New York: Association for Consumer Research.

Holmans, G. C. (1964). Contemporary Theory in Sociology. In R. E. L. Ferris (Ed.), *Handbook of Modern Sociology* (pp. 951-77). Chicago: Rand McNally.

Holsti, O. R. (1968). Content Analysis. In G. Lindzey and E. Aronson (Eds.), *The Handbook of Social Psychology* (Second ed., Vol. 2, pp. 596-692). Reading, Mass.: Addison-Wesley.

Holsti, O. R. (1969). *Content Analysis for the Social Sciences and Humanities*. Reading, MA.: Addison-Wesley.

Hope, C. (2000 , 16 June) Retail Giant that Lost Pace with the Times, *The Scotsman, p. 5.*

Horn, M., and Gurel, L. (1981). *The Second Skin*. Boston, M.A.: Houghton.

Horton, R. L. (1984). *Buyer Behavior: A Decision-Making Approach*. Columbus: Bell and Howell.

Howard, J. A. (1974). Confidence as Validated Construct. In J. A. Howard and L. E. Ostlund (Eds.), *Buyer Behavior* (pp. 426-442). New York: Alfred A. Knopf.

Howard, J. A. (1977). *Consumer Behavior: Application of Theory*. New York: McGraw-Hill.

Howard, J. A. (1983). Marketing Theory of the Firm. *Journal of Marketing, 47*, 90-100.

Howard, J. A., and Sheth, J. N. (1969). *The Theory of Buyer Behavior*. New York: Wiley and Sons.

Howell, D. C. (1992). *Statistical Methods for Psychology*. (3 ed.). Belmont, Ca.: Duxbury Press.

Huberman, A. M., and Miles, M. B. (1994). Data Management and Analysis Methods. In N. K. Denzin and Y. S. Lincoln (Eds.), *Handbook of Qualitative Research* (pp. 428-444). Thousand Oaks, Ca.: Sage.

Husserl, E. (1931). *Ideas: A General Introduction to Pure Phenomenology*. New York: Macmillan.

Hyams, J. (1996, 17 May). Shopping Without the Hazards of Cars. *Retail Week*, 17.

Hyman, R. (1988). Flexible Specialisation: Miracle or Myth. In R. Hyman and W. Streek (Eds.), *Trade Unions, Technology and Industrial Democracy* . Oxford: Blackwell.

Iyer, E. S. (1989). Unplanned Purchasing: Knowledge of Shopping Environment and Time Pressures. *Journal of Retailing, 65*(1), 40-57.

Jackson, T. and Shaw D. (2001), Fashion Buying and Merchandising Management. Basingstoke: Macmillan.

Jagger, S. (1999, 18 January). Suppliers Braced for Shock Wave from M&S. *Electronic Telegraph*, pp. Issue 1333.

Jain, A. K., and Etgar, M. (1976). Measuring Store Image Through Multidimensional Scaling of Free Response Data. *Journal of Retailing, 52*(4, Winter), 61-70.

James, D. L., Durand, R. M., and Dreves, R. (1976). The Use of a Multi-Attribute Attitude Model in a Store Image Study. *Journal of Retailing, 52*(2, Summer), 23-34.

Jankowicz, A. D. (1995). *Business Research Projects*. (Second ed.). London: Chapman and Hall.

Janssen, W. (1993). *Force: an Instrument to Measure the Strength of Shop Formulae*. Paper presented at the 7th International Conference on research in the distributive Trades, Stirling.

Jobber, D. (1995). *Principles and Practice of Marketing*. Maidenhead: McGraw-Hill.

Johnson, M. (1997). Retail Positioning Techniques : Research International.

Jones, J. P. (1986). *What's in a Name?* D.C. Heath, Lexington: Gower Hampshire.

Jones, M. O. (1988). In Search of Meaning: Using Qualitative Methods in Research and Application. In M. O. Jones, M. D. Moore, and R. C. Snyder (Eds.), *Inside Organisations: Understanding the Human Dimension* . London: Sage.

Jupp, V., and Norris, C. (1993). Traditions in Documentary Analysis. In M. Hammersley (Ed.), *Social Research: Philosophy, Politics and Practice* (pp. 37-51). London: Sage.

Kane, E. (1985). *Doing Your Own Research: Basic Descriptive Research in the Social Sciences and Humanities*. London: Marion Boyars.

Kassarjian, H. H. (1978). Presidential Address, 1977: Anthropomorphism and Parsimony. In H. K. Hunt (Ed.), *Advances in Consumer Research* (Vol. 5, pp. xii-xiv). Ann Arbor, MI: Association for Consumer Research.

Katona, G. (1960). *The Powerful Consumer*. New York: McGraw-Hill.

Kay, W. (1989). *Battle for the High Street*. London: Corgi Books.
Keat, R., and Urry, J. (1982). *Social Theory as a Science*. (2 ed.). London: Routledge and Kegan Paul.
Keaveney, S. M., and Hunt, K. A. (1992). Conceptualization and Operationalization of Retail Store Image: A Case of Rival Middle-level Theories. *Journal of the Academy of Marketing Science, 20*(2), 165-75.
Kelley, S. W., and Hoffman, K. D. (1997). An Investigation of Positive Affect, Prosocial Behaviors and Service Quality. *Journal of Retailing, 73*(3), 407-427.
Kerin, R., Jain, A., and Howard, D. J. (1992). Store Shopping Experience and Consumer Price-Quality-Value Perception. *Journal of Retailing, 68*(4), 376-97.
Kerlinger, F. N. (1976). *Foundations of Behavioural Research*. London: Holt, Rinehart and Winston.
King, C. W., and Rice, L. J. (1980). Market Positioning Across Retail Fashion Institutions: A Comparative Analysis of Store Types. *Journal of Retailing, 56*(1), 37-55.
Kinnear, P. R., and Gray, C. D. (1994). *SPSS for Windows Made Simple*. Hove: Lawrence Erlbaum Associates.
Kinnear, T. C., and Taylor, J. R. (1996). *Marketing Research; An Applied Approach*. (5 ed.). New York: McGraw-Hill.
Kinswell, T. (1997, 1 November). Searching for the Perfect Fit. *Drapers Record*, 35-37.
Kirby, D. A. (1976). The North American Convenience Store: Implications for Britain. In P. Jones and R. Oliphant (Eds.), *Local Shops: Problems and Prospects* (pp. 95-101). Reading: Unit for Retail Planning Information.
Knox, S., and de Chernatony, L. (1994). Attitude, Personal Norms and Intentions'. In M. Jenkins and S. Knox (Eds.), *Advances in Consumer Marketing* (pp. 85-99). London: Kogan Page.
Kolakowski, L. (1993). An Overall View of Positivism. In M. Hammersley (Ed.), *Social Research - Philosophy, Politics and Practice* (Vol. 1-8,). London: Sage.
Kolb, D. A. (1983). *Experiential Learning*. London: Prentice-Hall.
Kolb, D. A., Rubin, I. M., and McIntyre, J. M. (1979). *Organization Psychology: An Experiential Approach*. London: Prentice-Hall.
Kotler, P. (1973). Atmospherics as a Marketing Tool. *Journal of Retailing, 49*(4), 48-64.
Kotler, P., Armstrong, G., Saunders, J., and Wong, V. (1996). *Principles of Marketing: The European Edition*. Hemel Hempstead: Prentice Hall.
Krech, D., and Crutchfield, R. S. (1962). *Individual in Society*. New York: McGraw-Hill.
Krugman, H. E. (1965). The Impact of Television Advertising: Learning Without Involvement. *Public Opinion Quarterly, 29*(Fall), 349-56.
Kunkel, J., and Berry, L. (1968). A Behavioral Conception of Retail Image. *Journal of Marketing, 32*(October), 21-27.
Kuruvilla, S., Oliver, B., and Bickle, M. (1994). *Image of a Western-Wear Store: Consumers' and Retailers' Perceptions*. Paper presented at the E.I.R.A.S.S., Alberta, Canada.
Laing, R. D. (1967). *The Politics of Experience and the Birds of Paradise*. Harmondsworth: Penguin.
Laurent, G., and Kapferer, J. N. (1985). Measuring Consumer Involvement Profiles. *Journal of Marketing research, 22*(February), 41-53.
Laroche, M., and Howard, J. A. (1980). Nonlinear Relations in a Complex Model of Buyer Behavior. *Journal of Consumer Research, 6*(March), 377-388.
Lea-Greenwood, G. (1991). River Island Clothing Co.: A Case Study on Changing an Image. *International Journal of Retail and Distribution Management, Vol. 21*(No. 3), 60-64.
Lee, A. M. (1972). *Toward a Humanist Sociology*. Englewood Cliffs, N.J.: Prentice-Hall.
Lees, R., and Worthington, S. (1989). Achieving Above Average Profitability in Retailing. *International Journal of Retailing, 4*(2), 17.

Lehmann, D. R., Farley, J. U., and Howard, J. A. (1966). A 'working' System Model of Car Buyer Behavior. *Management Science, 23*, 235-47.

Lehmann, D. R., Gupta, S., and Steckel, J. H. (1997). *Marketing Research*. Reading, Mass.: Addison-Wesley.

Lehmann, D. R., O'Brien, T. V., and Farley, J. U. (1974). Some Empirical Contributions to Buyer Behavior Theory. *Journal of Consumer Research, 1*, 43-55.

Levy, M., and Weitz, B. A. (1995). *Retailing Management*. (Second ed.). Chicago: Irwin.

Levy, M., and Weitz, B. A. (1998). *Retailing Management*. (3 ed.). Boston: Irwin McGraw-Hill.

Lewis, B., and Hawskley, A. (1990). Gaining a Competitive Advantage in Fashion. *International Journal of Retail and Distribution Management, 18*(4), 23.

Lex. (1998, 28/29 March). Pick of Lex - Whatever Next. *Financial Times - Weekend Money*, pp. 4.

Lincoln, Y. S., and Guba, E. G. (1985). *Naturalistic Inquiry*. Beverly Hills: Sage.

Lindquist, J. D. (1974). Meaning of Image. *Journal of Retailing, 50*(4), 29-38;116.

Lockshin, L. S., Spawton, A. L., and Macintosh, G. (1997). Using Product, Brand and Purchasing Involvement for Retail Segmentation. *Journal of Retailing and Consumer Services, 4*(3), 171-183.

Louviere, J. J. (1994). Conjoint Analysis. In R. P. Bagozzi (Ed.), *Advanced Methods of Marketing Research* . Cambridge; Mass.: Blackwell.

Louviere, J. J., and Johnson, R. D. (1990). Reliability and Validity of the Brand-Anchored Conjoint Approach to Measuring Retailer Images. *Journal of Retailing, 66*(4), 359-382.

Louviere, J. J., and Johnson, R. D. (1991). Using Conjoint Analysis to Measure Retail Image. In A. Ghosh and C. A. Ingene (Eds.), *Research in Marketing; a Research Annual* (Vol. Supplement 5, pp. 137-156). Greenwich, Conn.: Jai Press.

Lowe, M. (1991). Trading Places: Retailing and Local Economic Development at Merry Hill, West Midlands. *East Midland Geographer, 14*, 31-48.

Luck, D. J., and Rubin, D. S. (1987). *Marketing Research*. (7 ed.). Englewood Cliffs., N.J.: Prentice-Hall.

Lumpkin, J. R., Greenberg, B. A., and Goldstucker, J. L. (1985). Marketplace Needs of the Elderly: Determinant Attitudes and Store Choice. *Journal of Retailing, 61*(Summer), 75-105.

Lunn, J. A. (1974). A Review of Consumer Decision Process Models. In P. Doyle, C. Weinberg, P. Law, and K. Simmonds (Eds.), *Analytical Marketing Management* (pp. 48-66). London: Harper and Row.

Lunn, T. (1978). Segmenting and Constructing Markets. In R. M. Worcester and J. Downham (Eds.), *Consumer Market Research Handbook* (2 ed., pp. 343-376). London: Van Nostrand Reinhold.

Lutz, R. J. (1991). The Role of Attitude Theory in Marketing. In H. H. Kassarjian and T. S. Robertson (Eds.), *Perspectives in Consumer Behavior* (Fourth ed.,). Englewood Cliffs: Prentice-Hall.

Lutz, R. J., and Kakkar, P. (1974). The Psychological Situation as a Determinant of Consumer Behaviour. In M. J. Schlinger (Ed.), *Advances in Consumer Research, 2* (pp. 439-54). Ann Arbor: Association of Consumer Research.

Maccoby, E. E., and Maccoby, N. (1954). The Interview: A Tool of Social Science. In G. Lindzey (Ed.), *Handbook of Social Psychology* (Vol. 1, pp. 449-87). Reading, Mass.: Addison-Wesley.

MacInnis, D. J., and Price, L. L. (1987). The Role of Imagery in Information Processing: Review and Extensions. *Journal of Consumer Research, 13*(March), 473-91.

MacLeod, C. (1998, 1 November). Jigsaw - Doing It Their Way. *The Appointment*, 6-7.

Macrae, C. (1996). *The Brand Chartering Handbook*. Harlow: Addison-Wesley.
Malhotra, N. K. (1983). A Threshold Model of Store Choice. *Journal of Retailing, 59*(2, Summer), 3-21.
Malhotra, N. K. (1986). Modeling Store Choice Based on Censored Preference Data. *Journal of Retailing, 62*(2, Summer), 128-144.
Markin Jr, J. (1974). *Consumer Behavior: A Cognitive Orientation*. New York: Macmillan.
Marks, R. (1976). Operationalizing the Concept of Store Image. *Journal of Retailing, 52*(Fall), 37-46.
Martineau, P. (1958). The Personality of the Retail Store. *Harvard Business Review, 36*(1), 47-55.
Martins, M., and Monroe, K. (1994). Perceived Price Fairness: A New Look at an Old Construct. *Advances in Consumer Research, 21*, 75-78.
Mason, B. J., Durand, R. M., and Taylor, J. L. (1983). Retail Patronage: A Causal Analysis of Antecedent Factors. In W. R. Darden and R. F. Lusch (Eds.), *Patronage Behavior* (pp. 339-351). New York: North-Holland.
Mason, J. (1996). *Qualitative Researching*. London: Sage.
Mason, J. B., and Mayer, M. (1973). Insights into the Image Determinants of Fashion Speciality Outlets. *Journal of Business Research, 1*(Summer), 73-80.
Mattson, B. E. (1982). Situational Influences on Store Choice. *Journal of Retailing, 58*(3), 46-58.
May, E. G. (1974). Practical Applications of Recent Retail Image Research. *Journal of Retailing, 50*(4), 15-20, 116.
Mazursky, D., and Jacoby, J. (1986). Exploring the Development of Store Images. *Journal of Retailing, 62*(2), 145-165.
McClure, P. J., and Ryans, J. K. (1968). Differences between Retailers' and Consumers' Perceptions. *Journal of Marketing Research, 5*(February), 35-40.
McCracken, G., and Roth, V. (1989). Does Clothing Have a Code? Empirical Findings and Theoretical Implications in the Study of Clothing as a Means of Communication. *International Journal of Research in Marketing, 6*, 13-33.
McDonald, M., and Dunbar, I. (1995). *Market Segmentation*. Basingstoke: Macmillan Press.
McDonald, M., and Tideman, C. (1996). *Retail Marketing Plans*. Oxford: Butterworth-Heinemann.
McDougall, G. H. G., and Fry, J. N. (1974). Combining Two Methods of Image Measurement. *Journal of Retailing, 50*(4, Winter), 53-61.
McGoldrick, P. J. (1990). *Retail Marketing*. London: McGraw-Hill.
McGoldrick, P. J., and Thompson, M. G. (1992). The Role of Image in the Attraction of the Out-of-town Centre. *The International Review f Retail, Distribution and Consumer Research, 3*(1), 81-98.
McGoldrick, P. J., and Andre, E. (1997). Consumer Misbehaviour. *Journal of Retailing and Consumer Services, 4*(2), 73-81.
McGuire, W. J. (1976). Some Internal Psychological Factors Influencing Consumer Choice. *Journal of Consumer Research, 2*(March), 302-319.
McJimsey, Harriet T. (1973), *Art and Fashion in Clothing. Ames*, Iowa: Iowa State University Press.
McNair, M. P. (1931). Trends in Large-scale Retailing. *Harvard Business Review, 10*, 30-39.
McNair, M. P., and May, E. G. (1976). *The Evolution of Retail Institutions in the United States*. Cambridge: Marketing Science Institute.
Menary, S. (2000, 20 July) Sales at M&S dip after brief recovery, *The Scotsman,* p.17.
Merrilees, B., and Miller, D. (1996). *Retailing Management - A Best Practice Approach.* Collingwood, Victoria: RMIT Press.
Merton, R. K. (1967). *On Theoretical Sociology*. New York: Free Press.

Meyers-Levy, J., and Strenthal, B. (1991). Gender Differences in the Use of Message Cues and Judgements. *Journal of Marketing Research, 28*, 84-96.
Miles, M. B., and Huberman, A. M. (1984). *Qualitative Data Analysis: A Sourcebook of New Methods*. Newbury Park, Ca.: Sage.
Miles, M. B., and Huberman, A. M. (1994). *Qualitative Data Analysis: An Expanded Sourcebook*. (2 ed.). Newbury Park, Ca.: Sage.
Miller, C. M., McIntyre, S. H., and Mantrala, M. K. (1993). Toward Formalizing Fashion Theory. *Journal of Marketing Research, 30*(May), 12-157.
Miller, D., Jackson, P., Thrift, N., Holbrook, B., and Rowlands, M. (1998). *Shopping, Place and Identity*. London: Routledge.
Miller, G. A. (1956). The Magical Number Seven, Plus or Minus Two: Some Limits on Our Capacity for Processing Information. *Psychological Review, 63*(March), 81-97.
Miller, L. (1998, 3 January). Aiming to be A Man for all Seasons. *Drapers Record, Focus*, ii-iv.
Mills, L. (1997a, 26 September). Burtons Farms Out Key Central Roles. *Retail Week*, 1.
Mills, L. (1997b, 21 November). Burton's Tailors In-store Ranges. *Retail Week*, 1.
Mills, L. (1998, 8 November). Secret Figures Reveal M&S's Market-share Woes. *Electronic Telegraph*, pp. Issue 1262.
Mills, L. (1999a, 31 January). M&S Seeks to Sell Littlewoods Store. *Electronic Telegraph*, pp. Issue 1346.
Mills, L. (1999b, 24 January). Monsoon Moves into Furnishings. *The Sunday Telegraph*, pp. B3.
Mills, L. (1999c, 4 July). Arcadia to close all Richards' stores. *Electronic Telegraph*, Issue 1500.
Mills, L. (2000, 9 April) Arcadia to Slash Menswear Chains, *Electronic Telegraph,* Issue 1780.
Miniard, P. W., and Cohen, J. B. (1981). an examination of the Fishbein-Ajzen Behavioral Intentions Model's Concepts and Measures. *Journal of Experimental Social Psychology, 17*(July), 309-339.
Mintel. (1993a). *Clothing and Footwear Retailing* (Retail Intelligence). London: Mintel Publications.
Mintel. (1993b). *Independent Specialists Clothing* (Market Intelligence). London: Mintel Publications.
Mintel (1994). Clothing Retailing, *Retail Intelligence,* Vol. 6, London: Mintel Publications.
Mintel. (1995a). *Clothing Retailing* (Retail Intelligence Vol. 6). London: Mintel Publications.
Mintel. (1995b). *Specialist Clothing Retailers* (Market Intelligence). London: Mintel Publications.
Mintel. (1997a). *Clothing Retailing* (Retail Intelligence 6). London: Mintel Intelligence.
Mintel. (1997b). *Menswear* (Market Intelligence). London: Mintel Publications.
Mintel. (1997c). *Sports Goods Retailing* (Retail Intelligence 4). London: Mintel Publications.
Mintel. (1997d). *The UK Clothing Consumer - Looking inside the Wardrobe* (Special Report). London: Mintel International.
Mintel (1997e). Lifestyle Magazines, *Market Intelligence*, London: Mintel Publications.
Monopolies and Mergers Commission. (1981). *Discounts to Retailers*. London: HMSO.
Monroe, K. (1990). *Pricing: Making Profitable Decisions*. (2 ed.). New York: McGraw-Hill.
Monroe, K., and Petroshius, S. (1981). Buyer' Perceptions of Price: An Update of the Evidence. In T. Robertson and H. Kassarjian (Eds.), *Perspectives in Consumer Behavior* (3 ed., pp. 23-42). Glenview, IL: Scott Foresman.

Moore, C. M. (1995). From Rags to Riches - Creating and Benefiting from the Fashion Own Brand. *International Journal of Retail and Distribution Management, 23*(9), 19-28.
Moore, C. M. (1996). La Mode Sans Frontieres? The Internationalisation of Fashion Retailing. *Journal of Fashion Marketing and Management, 1*(4), 345-356.
Moore, C. M. (1998). L'internationalisation du Pret-a-porter: The Case of Kookai and Morgan's Entry into the UK Fashion Market. *Journal of Fashion Marketing and Management, 2*(2), 153-158.
Moore, C. M., and Lochhead, M. (1998). The Management of Retail Design: Demystifying the Activity. *Journal of Consumer Studies and Home Economics, 22*(3), 121-130.
Moore, C. M., and Shearer, L. (1998). Competitive Asset or Unnecessary Expense? The Role of the Designer within UK Fashion Retailing. *Journal of Fashion Marketing and Management, 2*(3), 217-229.
Mort, F. (1996). *Cultures of Consumption: Masculinities and Social Space in Late Twentieth-Century Britain*. London. Routledge.
MTI. (1998). *The UK Fashion Report 1998/99* . London: Market Tracking International/EMAP Fashion.
Mueller, C.S. and Smiley, E.L. (1995), *Marketing Today's Fashion.* Englewood Cliffs, NJ: Prentice Hall
Muniz-Martinez, N. (1998). The Internationalisation of European Retailers in America: The US Experience. *International Journal of Retail and Distribution Management, 26*(1), 29-37.
Murden, T. (1998, 28 July). Hunter Moves up a League in Dream Deal. *The Sunday Times, Business Section*, pp. 11.
Murphy, J. M. (1992). What is Branding? In J. M. Murphy (Ed.), *Branding: A Key Marketing Tool* (2 ed., pp. 1-12). Basingstoke: Macmillan.
Musannif, Y. (1988). Introduction: Store Wars - The Background to UK Retailing. In A. West (Ed.), *Handbook of Retailing* . Aldershot: Gower.
Myers, R. H. (1960). Sharpening Your Store Image. *Journal of Retailing, 36*(Fall), 124-137.
Naisbett, J. (1982). *Megatrends*. New York: Warren Books.
NCC. (1991). *Trade and Competition Policy: The Consumer Interest. International Trade and the Consumer* (Working Paper 5). London: National Consumer Council.
Needham, R. (1981). *Circumstantial Deliveries*. Los Angeles: University of California Press.
Newby, P. (1993). Shopping as Leisure. In R. D. F. Bromley and C. J. Thomas (Eds.), *Retail Change, Contemporary Issues* (pp. 209-228). London: UCL Press.
Next. (1987). *Interim Statement* . Leicester: Next plc.
Next. (1995). *Next Factfile*. Leicester: Next PLC.
Nicosia, F. M. (1966). *Consumer Decision Processes*. New York: Prentice-Hall.
Nielsen. (1993). *The Retail Pocket Book* . London: NTC Publications.
Novina, T. (1996). Casual Dress Poses Industry Challenges: http://www.web4u-.com/ati/September1996/!casuald.htm.
O'Brien, L. G., and Harris, F. W. (1991). *Retailing: Shopping, Society, Space*. London: David Fulton.
O'Connor, M. J. (1991). On the Subject of Image. *International Trends in Retailing, 8*(2), 17-29.
Oliver, R. L., and Bearden, W. O. (1985). Crossover Effects in the Theory of Reasoned Action: A Moderating Influence Attempt. *Journal of Consumer Research, 12*(December), 324-40.
Olshavsky, R. W., and Granbois, D. H. (1979). Consumer Decision Making: Fact or Fiction? *Journal of Consumer Research, 6*(September), 93-100.

Oppenwal, H., and Timmermans, H. (1997). Retailer Self-perceived Store Image and Competitive Position. *International Review of Retail, Distribution and Consumer Research, 7*(1), 41-59.

Osborne, A. (1998, 24 July). JJB and Sports Division Team up as Biggest Players. *Daily Telegraph*, pp. 31.

Osborne, A. (1999, 16 September). Next springs 36pc surge at midway. *Electronic Telegraph*, pp. 1574.

Osgood, C. E., Suci, G. J., and Tannenbaum, P. H. (1957). *The Measurement of Meaning*. Urbana, Illinois: University of Illinois Press.

Osman, M. Z. (1993). A Conceptual Model of Retail Image Influences on Loyalty Patronage Behaviour. *International Review of Retail, Distribution and Consumer Research, vol. 3*(No. 2), 133-148.

Parker, G. (1997). How to Make the Grade. *Retail Week*.

Pathak, D. S., Crissy, W. J. E., and Sweitzer, R. W. (1974). Customer Image versus the Retailer's Anticipated Image: A Study of Four Department Stores. *Journal of Retailing, 50*(4), 21-28, 116.

Patton, M. (1990). *Qualitative Evaluations and Research Methods*. California: Sage.

Paulins, V. A. (1993). *The Effect of Store Attributes on Apparel Store Preference*. Paper presented at the E.A.R.C.D., University of Stirling.

Peacock, S. (1997) Interview with Store Manager, Next Retail Ltd. Glasgow, 4 April.

Payne, R. (1991). Taking Stock of Corporate Culture. *Personnel Management, July*, 16-29.

Perna, R. (1987), Fashion Forecasting: Fairchild Publications.

Peterson, R. A., and Kerin, R. S. (1983). Store Image Measurement in Patronage Research: Fact and Artifact. In W. R. Darden and R. F. Lusch (Eds.), *Patronage Behavior and Retail Management* (pp. 293-306). New York: Elsevier Science Publishing.

Phelps, J. (1999, 8 April). Moss Hangs Hope on Brands in a Threadbare High Street. *The Scotsman*, Section 2, 28.

Phillips, H., and Bradshaw, R. (1993). How Customers Actually Shop: Customer Interaction with the Point of Sale. *Journal of the Market Research Society, 35*(1), 51-62.

Phillips, H., Broderick, A., and Thompson, P. (1997). Perception, Selectivity and Decision Making at the Point of Sale. *The International Review of Retail, Distribution and Consumer Research, 7*(1), 79-89.

Pook, S. (2000, 14 April) Retail Giant Arcadia to Shed 3,5000 Jobs, *Electronic Telegraph*, Issue 1785.

Popper, K. R. (1959). *The Logic of Scientific Discovery*. London: Routledge and Kegan Paul.

Popper, K. R. (1963). *Conjecture and Refutations*. London: Routledge and Kegan Paul.

Porter, J. (1997a, 26 September). Booming Marvellous. *Retail Week*, 12.

Porter, J. (1997b, 31 October). Life beyond Brands. *Retail Week*, 24.

Porter, J. (1997c, 7 February). Vive la Difference. *Retail Week*, 21.

Porter, M. E. (1985). *Competitive Advantage; Creating and Sustaining Superior Performance*. New York: Free Press.

Potter, B. (1999, 22 January). Lure of the Premier League Behind Arcadia's Attraction. *Electronic Telegraph*, pp. Issue 1337.

Quinn, F. (1990). *Crowning the customer: How to become Customer-Driven*. Dublin: O'Brien Press.

Ramsay, M. (1992). *Human Needs and the Market*. Aldershot: Avebury.

Randall, G. (1997). *Branding*. London: Kogan Page.

Rankine, K. (1998, 27 March). Next Plunges as Fashions Fail to Shift. *Daily Telegraph - Business News*, pp. 33.

Rankine, K. (1999a, 7 July). M&S racks up on clothing sizes. *Electronic Telegraph*.

Rankine, K. (1999b, 15 January). M&S Shocks City with Profits Alert. *Electronic Telegraph*, pp. Issue 1330.
Rankine, K. (1999c, 25 February). M&S Wields Axe at Baker Street. *Electronic Telegraph*, pp. 1371.
Rankine, K. (1999d, 8 July). Green 'to net £160m' from Sears clothing chains sale. *Electronic Telegraph*, pp. 1504.
Rasband, J. (1996). *America's Going Down the Tube in a T-shirt!: Decline in Dress Reflects Decline in Culture*. Provo, Utah: Conselle Institute of Image Management.
Rawlings, L. (1996). A Dedicated Leader of Fashion. *The Sunday Times*, pp. Section 11 - 2.
Rawlinson, R. (1995, 6 July). Comment. *Fashion Weekly*, 2.
Ray, M. L. (1982). *Advertising and Communication Management*. Engelwood Cliffs, NJ: Prentice-Hall.
Rees, G. (1997). Stores Put Faith in Own-label Revival. *Drapers Record Focus*.
Reicher, S., and Emler, N. (1986). Managing Reputations in Adolescence: The Pursuit of Delinquent and Non-delinquent Identities. In H. Beloff (Ed.), *Getting into Life* . London: Methuen.
Reid, S. (1998) Interview with Area Manager for Arcadia, Glasgow, 7 December.
Retail Review. (1996). *'Next' Excels Yet Again - Annual Results* (221). Manchester: CWS.
Retail Trade Review. (1994a). *Burton* (Company Profile 30). London: The Economist Intelligence Unit Ltd.
Retail Trade Review. (1994b). *Company Profile No. 2: Burton* (30, p.104-109). London: The Economist Intelligence Unit.
Retail Trade Review. (1996). *Company Profile No. 2: Burton* (38). London: Corporate Intelligence.
Reynolds, J. (1989). *Retailing in the 90s: Threats to Profitability*. Harlow: Longman.
Reynolds, R. D., Darden, W. R., and Martin, W. S. (1974). Developing an Image of the Store Loyal Customer. *Journal of Retailing, 50*(Winter), 73-84.
RI. (1992). *Market Research Report and Recommendations*. London: Research International.
Rich, S. U., and Portis, B. D. (1964). The 'Imageries' of Department Stores. *Journal of Marketing, 28*(April), 10-15.
Richer, J. (1996). *The Richer Way*. (Second ed.). London: Emap Business Communications.
Rook, D. W. (1987). The Buying Impulse. *Journal of Consumer Research, 14*(September), 189-198.
Rook, D. W., and Fisher, R. J. (1995). Normative Influences on Impulsive Buyer Behavior. *Journal of Consumer Research, 22*(December), 305-313.
Rosenbloom, B. (1981). *Retail Marketing*. New York: Random House.
Rosenbloom, B. (1983). Store Image Development and the Question of Congruency. In W. R. Darden and R. F. Lusch (Eds.), *Patronage Behavior and Retail Management* (pp. 141-149). New York: Elsevier Science.
Rothery, C. (1997). *A comparison of fashion retailers' staff benefits* (Unpublished company project): Glasgow Caledonian University.
Ryan, M. J., and Bonfield, E. H. (1975). The Fishbein Extended Model and Consumer Behavior. *Journal of Consumer research, 2*(September), 118-136.
Salmon, W. J., and Tordjman, A. (1989). The Internationalisation of Retailing. *The International Journal of Retailing, 4*(2), 3-16.
Samli, A. C. (1989). *Retail Marketing Strategy. Planning, Implementation, and Control.* Westport, Conn.: Quorum Books.
Samli, A. C., and Lincoln, D. (1989). Management Versus Customer Perception of Image. In A. C. Samli (Ed.), *Retail Marketing Strategy: Planning, Implementation, and Control* (pp. 193-205). New York: Quorum.

Samson, P., and Harris, P. (1970). A User's Guide to Fishbein. *Journal of the Market Research Society, 12*(3), 145-66.

Saporito, B. (1993). Unsuit Yourself: Management Goes Informal. *Fortune, 128*(6), 118-121.

Sayer, A. (1992). *Method in Social Science: A Realist Approach.* (Second ed.). London: Routledge.

Schiffman, L., Dash, J., and Dillon, W. (1977). The Contribution of Store-Image Characteristics to Store-Type Choice. *Journal of Retailing, 53*(2, Summer), 3-14, 46.

Schiffman, L. G., and Kanuk, L. L. (1994). *Consumer Behavior.* (Fifth Edition ed.). Englewood Cliffs, New Jersey: Prentice-Hall.

Schiller, R. (1986). Retail Decentralisation: The Coming of the Third Wave. *The Planner, July*, 13-15.

Seenan, G. (1998, 21 January). The Regeneration of Glasgow - Fashioning a future. *The Herald*, pp. 14.

Seidman, S. (1992). Postmodern Social Theory as Narrative with a Moral Intent. In S. Seidman and D. G. Wagner (Eds.), *Postmodernism and Social Theory* (pp. 47-81). Oxford: Blackwell.

Sharp, S. (1996). Telephone Interview with Marketing Director of S. Sharp Associates. London.

Sheth, J. (1983). An Integrative Theory of Patronage Preference and Behavior. In W. R. Darden and R. F. Lusch (Eds.), *Patronage Behavior and Retail Management* (pp. 9-28). New York: North-Holland.

Sheth, J. N. (1974). *Models of Buyer Behavior.* New York: Harper and Row.

Sheth, J.N., B. Mittal, and B.I. Newman, *Customer Behavior, Consumer Behavior and Beyond.* 1999, Orlando, FL: Dryden Press.

Sheth, J. N., and Sethi, S. P. (1997). A Theory of Cross-cultural Buyer Behavior. In A. G. Woodside, J. N. Sheth, and P. D. Bennett (Eds.), *Consumer and Industrial Buying Behavior* (pp. 369-86). New York: North-Holland.

Shin, S., and Dickerson, K. (1999). Personal and Non-personal References used by South Korean Men in Apparel Purchase Decisions. *Journal of Fashion Marketing and Management, 3*(1), 7-17.

Silverman, D. (1985). *Qualitative Methodology and Sociology.* Aldershot, Hants.: Gower.

Silverman, D. (1993). *Interpreting Qualitative Data: Methods For Analysing Talk, Text and Interaction.* London: Sage.

Silverman, H. J. (Ed.). (1990). *Postmodernism - Philosophy and the Arts.* New York: Routledge.

Silverman, H. J. (1992). Between Merleau-Ponty and Postmodernism. In T. W. Busch and S. Gallagher (Eds.), *Merleau-Ponty, Hermeneutics, and Postmodernism* (pp. 138-147). Albany: State University of New York Press.

Sirgy, M. J., and Samli, A. C. (1985). A Path Analytic Model of store Loyalty. *Journal of the Academy of Marketing Science, 13*(June), 265-91.

Smith, I. (1994). *Meeting Customer Needs.* Oxford: Butterworth-Heinemann.

Smith, L. D. (1986). *Behaviorism and Logical Positivism: A Reassessment of the Alliance.* Stanford, Calif.: Stanford University Press.

Smith, P. (1996). The Paul Smith Masterclass . Royal Concert Hall, Glasgow.

Smith, P., and Burns, D. J. (1996). Atmospherics and Retail Environments: The Case of the "Power Aisle". *International Journal of Retail and Distribution Management, 24*(1), 7-14.

Solomon, M. R. (1994). *Consumer Behavior.* (Second ed.). Boston: Allyn and Bacon.

Sorrell, M. (1996). Beans and Pearls - The Beginning of the End of either/or? . Design and Art Direction President's Lecture Series: WPP Group plc.

Sparks, L. (1988). Change in UK Retail Distribution. , 10-16.

Stauss, B., and Weinlich, B. (1997). Process-oriented Measurement of Service Quality: Applying hte Sequential Incident Technique. *European Journal of Marketing, 31*(1), 33-55.

Steenkamp, J.-B. E. M. (1990). Conceptual Model of the Quality Perception Process. *Journal of Business Research, 21*, 309-333.

Steiner, S. (1998). Nike Faces Loss as it Falls Out of Step with Fashion . Electronic Telegraph: Telegraph Group Ltd.

Stern, H. (1962). The Significance of Impulse Buying Today. *Journal of Marketing, 26*, 59-62.

Sudman, S. (1976). Sample Surveys. *Annual Review of Sociology, 2*, 107-20.

Sudman, S. (1994). Sampling. In R. P. Bagozzi (Ed.), *Principles of Marketing Research* (pp. 73-115). Cambridge, Mass.: Blackwell.

Swan, J. E. (1977). Consumer Satisfaction with a Retail Store Related to its Fulfilment of Expectations on an initial Shopping Trip. In R. L. Day (Ed.), *Consumer Satisfaction, Dissatisfaction, and Complaint Behaviour* (pp. 10-17). Bloomington: Indiana University.

Sweeney, J. C., Soutar, G. N., and Johnson, L. W. (1997). Retail Service Quality and Perceived Value. *Journal of Retailing and Consumer Services, 4*(1), 39-48.

Swinyard, W. R. (1977). Market Segmentation in Retail Service Industries: A Multiattribute Approach. *Journal of Retailing, 53*(1, Spring), 27-34, 92-93.

Sykes, W. (1991). Taking Stock: Issues from the Literature on Validity and Reliability in Qualitative Research. *Journal of the Market Research Society, 33*(1), 3-12.

Taylor, J., and Gutman, J. (1974). A Reinterpretation of Farley and Rings's Test of the Howard-Sheth Model of Buyer Behavior. In S. Ward and P. Wright (Eds.), *Advances in Consumer Research* (Vol. 1, pp. 436-446). Urbana,Ill.: Association for Consumer Research.

Taylor, R. (1997, 24 March). Private UK Clothes Retailers Outperform Euro Rivals. *Financial Times*, pp. 25.

Taylor, S. A., and Baker, T. L. (1994). An Assessment of the Relationship Between Service Quality and Customer Satisfaction in the Formation of consumers' Purchase Intentions. *Journal of Retailing, 70*(2), 163-178.

Thomas, C. J. (1989). Retail Change in Greater Swansea: Evolution or Revolution. *Geography*, 201-213.

Thomas-Emberson, S. (1998, 4 September). Simply Design. *Retail Week*, pp. 26.

Thomason, G. F. (1988). *A Textbook of Human Resource Management*. London: Institute of Personnel Management.

Thompson, K. E., and Chen, Y. L. (1998). Retail Store Image: A Means-end Approach. *Journal of Marketing Practice: Applied Marketing Science, 4*(6), 161-173.

Thompson, P. (1993). Postmodernism: Fatal Attraction. In J. Hassard and M. Packer (Eds.), *Postmodernism and Organizations* (pp. 183-203). London: Sage.

Thurstone, L. L. (1929). Theory of Attitude Measurement. *Psychological Review, 36*, 222-41.

Thurstone, L. L., and Chave, E. J. (1929). *The Measurement of Attitude*. Chicago: University of Chicago Press.

TMS. (1992). *Menswear Presentation to Next Retail Ltd* . London: The TMS Partnership.

Tordjman, A. (1994). European Retailing: Convergences. Differences and Perspectives. *International Review of Retail Distribution and Consumer Research, 22*(5).

Townsend, A. (1998). *Workplace Casualties*: http://www.activedayton.com/business/stories/1998/Jul.05/casual.html.

Townsend, B. (1991). Consumers Don't Always Do What They Say. *American Demographics, 13*(April), 12-13.

Treadgold, A. (1990). The Emerging Internationalisation of Retailing: Present Status and Future Challenges. *Irish Marketing Review, 5*(2), 11-27.

Trefgarne, G. (1998, 20 August). M&S Menswear Expansion. *Electronic Telegraph*, pp. Issue 1182.

Tremblay, M. A. (1982). The Key Informant Technique: A Non-ethnographic Application. In R. Burgess (Ed.), *Field Research: A Sourcebook and Field Manual* . London: Allen and Unwin.

Trend, M. G. (1978). On the Reconciliation of Qualitative and Quantitative Analyses: a Case Study. *Human Organization, 37*, 345-54.

Tse, K. K. (1985). *Marks & Spencer: Anatomy of Britain's Most Efficiently Managed Company*. Oxford: Pergamon.

Tuck, M. (1973). Fishbein Theory and the Bass-Talarzyk Problem. *Journal of Marketing Research, 19*, 345-48.

Tuck, M. (1976). *How Do We Choose?* London: Methuen.

Turnbull, P. W., and Wilson, D. T. (1989). Developing and Protecting Profitable Customer Relationships. *Industrial Marketing Management, 18*(August), 233-238.

Tyler, S. A. (1986). Post-Modern Ethnography: From Document of the Occult to Occult Document. In J. Clifford and G. E. Marcus (Eds.), *Writing Culture: The Poetics and Politics of Ethnography* (pp. 122-40). Berkeley: University of California Press.

Tynan, A. C., and Drayton, J. (1987). Market Segmentation. *Journal of Marketing Management, 2*(3), 301-335.

UN. (1985). *Transnational Trading Corporations in Selected Asian and Pacific Countries* (ESCAP, UNCTC, Series B, 6). New York: United Nations.

van Auken, S., and Lonial, S. C. (1991). Multidimensional Scaling and Retail Positioning: An Appraisal. *International Journal of Retail and Distribution Management, 19*(3), 11-18.

van der Pol, M., and Ryan, M. (1996). Using Conjoint Analysis to Establish Consumer Preferences for Fruit and Vegetables. *British Food Journal, 98*(8), 5-12.

van Maanen, J. (Ed.). (1979). *Qualitative Methodology*. Beverly Hills, Ca.: Sage.

Verdict. (1994). *Retail Fashion Images* (Special Report). London: Verdict Research Limited.

von Wright, G. H. (1993). Two Traditions. In M. Hammersley (Ed.), *Social Research: Philosophy, Politics and Practice* (pp. 9-13). London: Sage.

Walsh, J. (1998, 23 July). HRM's Full Complement Works Better. *People Management, 4*, 14.

Walters, D. (1988). *Strategic Retailing Management: A Case Study Approach*. Hemel Hempstead: Prentice-Hall.

Walters, D. (1994) *Retailing Management: Analysis, Panning and Control*. Basingstoke: Macmillan.

Walters, D., and Laffy, D. (1996). *Managing Retail Productivity and Profitability*. Basingstoke: Macmillan Press.

Walters, D., and White, D. (1987). *Retail Marketing Management*. Basingstoke: Macmillan.

Ward, P., Sturrock, F., Schmidt, R. A., and Lea-Greenwood, G. (1998). *To Shop or Deshop: Motivational Aspects of Product Returns*. Paper presented at the Academy of Marketing, Sheffield Hallam University.

Ward, S., and Robertson, T. S. (1973). *Consumer Behaviour: Theoretical Sources*. Engelwood Cliffs, N.J.: Prentice Hall.

Ward, T. S. (1973). *The Distribution of Consumer Goods*. London: Cambridge University Press.

Warnaby, G., and Woodruffe, H. (1995). Cost Effective Differentiation: An Application of Strategic Concepts to Retailing. *The International Review of Retail, Distribution and Consumer Research, 5*(3), 253-269.

West, A. (1988). Differentiation and Retailing - The Continuing Struggle. In A. West (Ed.), *Handbook of Retailing* (pp. 186-22). Aldershot: Gower.

Wileman, A., and Jary, M. (1997). *Retail Power Plays: From Trading to Brand Leadership*. Basingstoke: Macmillan.

Wilkie, W. L. (1990). *Consumer Behavior*. (2 ed.). New York: John Wiley and Sons.

Willans, J. (1995). Fashion Distribution. In M. Easey (Ed.), *Fashion Marketing* (pp. 150-166). Oxford: Blackwell Science.

Williams, F. (1997). Interview with Group Marketing Research Manager, Next plc, Nottingham, 21 July.

Williams, J., and Dardis, R. (1972). Shopping Behavior for Soft Goods and Marketing Strategies. *Journal of Retailing, 48*(Fall), 32-41.

Williamson, M. (1998, 26 July). Between a Rock and a Hard Place. *Scotland on Sunday; Focus*, pp. 4.

Winch, P. (1958). *The Idea of Social Science*. London: Routledge and Kegan Paul.

Wind, Y. (1978). Issues and Advances in Segmentation Research. *Journal of Marketing, 15*(3), 315-337.

Winer, B. J. (1973). *Statistical Principles in Experimental Design*. (2 ed.). New York: McGraw-Hill.

Wittgenstein, L. (1922). *Tractacus Logico-Philosophicus*. London: Routledge and Kegan Paul.

Woodruff, R. B., and Gardial, S. F. (1996). *Know Your Customer: New Approaches to Understanding Customer Value and Satisfaction*. Cambridge, Mass.: Blackwell.

Woodruffe, H. (1998). *Shop Till you Drop* [TV programme]. London: McDougall Craig Production for Channel 4.

Worthington, S. (1998). Loyalty Cards and the Revitalisation of the Town Centre. *International Journal of Retail and Distribution Management, 26*(2), 68-77.

Wortzel, L. H. (1987). Retailing Strategies for Today's Mature Marketplace. *Journal of Business Strategy, 7*(4), 45-56.

Wriens, M. (1994). Solving Marketing Problems With Conjoint Analysis. In G. J. Hooley and M. K. Hussey (Eds.), *Quantitative Methods in Marketing* (pp. 37-53?). London: Academic Press.

Yau, O. H. M. (1994). *Consumer Behaviour in China - Consumer Satisfaction and Cultural Values*. London: Routledge.

Zaltman, G., Pinson, C. R. A., and Angelman, R. (1973). *Metatheory and Consumer Behavior*. New York: Hold Rinehart and Winston.

Zeithaml, V. A., and Bitner, M. J. (1996). *Services Marketing*. New York: McGraw-Hill.

Zeithaml, V. A., Parasuraman, A., and Berry, L. L. (1990). *Delivering quality Service: Balancing Customer Perceptions and Expectations*. New York: The Free Press.

Zelditch, J. M. (1962). Some Methodological Problems of Field Studies. *American Journal of Sociology, 67*, 566-76.

Zimmer, M. R., and Golden, L. L. (1988). Impressions of Retail Stores: A Content Analysis of Consumer Images. *Journal of Retailing, 64*(3), 265-93.

Appendix 1

Competitor analysis in terms of the percentages of customers who also purchase from different retail outlets

	People who shop at: Marks & Spencer	People who shop at: Bhs	People who shop at: Burton Menswear	People who shop at: C&A	People who shop at: Next for Men	People who shop at: River Island	People who shop at: Debenhams	People who shop at: House of Fraser	People who shop at: Littlewoods	People who shop at: Top Man	People who shop at: Principles for Men
Also shop at: M & S	*	69	31	36	45	44	60	66	38	25	51
Also shop at: Bhs	18	*	9	18	7	10	15	15	15	5	14
Also shop at: Burton Menswear	17	18	*	26	24	30	27	18	18	43	40
Also shop at: C&A	15	29	21	*	9	13	25	19	28	14	18
Also shop at: Next for Men	15	9	14	7	*	33	12	18	7	21	46
Also shop at: River Island	14	12	17	10	31	*	10	13	6	28	42
Also shop at: Debenhams	14	13	11	14	8	8	*	18	10	10	19
Also shop at: House of Fraser	12	11	6	8	10	8	14	*	7	6	16
Also shop at: John Lewis	10	11	3	5	7	6	7	22	ϕ	4	8
Also shop at: Littlewoods	10	15	9	18	6	5	12	11	*	5	11
Also shop at: Top Man	10	7	32	14	26	37	17	13	7	*	33
Also shop at: Principles for Men	8	9	13	7	24	22	14	15	7	14	*

Source: Verdict (1994)

Note: ϕ means no record

Appendix 2

Phase One - Exploratory Survey

GLASGOW CALEDONIAN UNIVERSITY
Faculty of Business
Department of Consumer Studies

I am a student at Glasgow Caledonian University. I wonder if you would help me by completing the following questionnaire.

Date:	Time:	Place:	Student 1:	Student 2:

Part 1: Store Image

1. From which stores have you purchased menswear fashion articles in the last six months?

(List up to three and identify with ✓)

Burton Menswear		Slaters Menswear	
Principles for Men		Fosters	
Top Man		Next for Men	
Debenhams		Austin Reed	
Marks & Spencer		Moss Bros./ Tailors Guild	
Bhs		Cruise	
Other: (please specify)		Smiths Menswear	

2. Please describe the image of the above stores by listing the specific characteristics or attributes that you like and dislike. (Complete the table below).

3. Rank each attribute in order of importance. Allocate a score of 1 for the most important, 2 for the next and so on. (Complete table below).

	ATTRIBUTE (Question 2)	**IMPORTANCE (Question 3)**
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Part 2: Personal Shopping Behaviour

4. How often do you visit Menswear Fashion shops? (Tick only one)

Every week	[ ]
Approximately once a month but less than every week	[ ]
Approximately four time a year but less than once a month	[ ]
Approximately once a year but less than four times a year	[ ]

5.. What is the main purpose of your shopping? (Tick only one)

Shopping for yourself	[ ]
Shopping for presents	[ ]
Shopping for you partner	[ ]

6. When you shop in Menswear Fashion shops do you preferably: (Tick the most appropriate)

Shop on your own	[ ]
Shop with friends	[ ]
Shop with partner/spouse	[ ]

Part 3: Personal Details

7. Gender

Male	[ ]
Female	[ ]

8. Age

16 - 25	[ ]
26 - 35	[ ]
36 - 45	[ ]
Over 45	[ ]

9. Occupation of the main provider in the household.

Higher managerial or professional	[ ]
Intermediate managerial or professional	[ ]
Supervisory, clerical or junior management	[ ]
Skilled manual workers	[ ]
Semi and unskilled manual workers	[ ]
Students	[ ]
Housewife	[ ]
Unemployed	[ ]
Retired	[ ]

Thank you for completing the questionnaire

Appendix 3

Company Profiles

The Arcadia Group

At the beginning of the century the company started out as Burton the Tailors, a menswear store selling made-to-measure and ready-to-wear suits to the mass market. During the 1980's Ralf Halpern expanded the business through acquisitions and created a number of facias each targeting specific consumer segments. Furthermore, Debenhams was purchased in 1985 and converted to sell all Burton Group brands as well as being a forum for concessions (Retail Trade Review, 1994b).

In January 1998, the Burton Group restructured the business into two separate groups of companies: Arcadia and Debenhams. Arcadia includes the fashion chains of Burton Menswear, Principles, Top Shop/Top Man, Dorothy Perkins and Evans and has outlets in over 450 towns in the UK specialising in menswear and ladieswear retailing. All formats sell a combination of national brands and own label goods and offer their merchandise via the Internet and in a mail order catalogue in co-operation with Littlewoods.

Each company, within the Burton Group, used to be independently managed, but a new centralised infrastructure will permit the company to gain benefits and efficiencies as overlaps in central functions of the different facia are removed (Hall, 1997a). Moreover, outsourcing of functions such as personnel; retail design and development; and buying and merchandising is being investigated (Mills, 1997a). Research into customer purchases per outlet is being used to define 'local' customer profiles and to identify product lines for each store. If this assessment manages to identify customer requirement clusters for a number of stores, it will necessitate development of a new logistics system (Mills, 1997b).

In April 2000, the group announced a radical review of the menswear business due to under performance and worse than expected half-year losses. Principle for Men stores will all be closed and the number of Burton Menswear and Top Man are expected to be reduced and some brands brought together (Mills, 2000). In all at least 400 stores will close across ladies and menswear with a loss of 3,500 jobs (Pook, 2000).

Burton Menswear

Burton the Tailors has undergone a number of name changes in the last decade: Burton, Burtons and most recently Burton Menswear. Burton Menswear had a market share estimated to be 7.6 per cent for 1993, from a sales area of 1.1 m. sq. ft. and an estimated sales density of £294 per sq. ft. (Verdict, 1994). The average store size was around 2,650 sq. ft. and Burton Menswear employed approximately 4,200 full and part time staff in 377 stand alone stores and 38 concessions.

Burton Menswear attracts customers mainly from the C1C2 socio-economic group in the 25 to 49 year old age groups (Burton, 1996). The majority of customers are under 35, but 35 to 54 years old men are also well represented (Verdict, 1994). Burton Menswear aim to offer consumers 'mid-priced mainstream' fashion garments and appear to outperform other fashion retailers on price. Their main competitors are Top Man, Marks & Spencer, C&A, Fosters, River Island, Next for Men and Principles. Consumer perception of merchandise quality is low compared to its competitors, with only Top Man and Littlewoods being perceived to sell clothing of a lower quality (Verdict, 1994).

The stores are on prime sites across the UK on the high street or in out-of-town shopping centres. All Burton Menswear locations have been reviewed and new shopfits carried out (Mintel, 1993a). The stores have a new fascia and the Burton Menswear logo and store layouts have been modernised. In the future, space allocated to menswear across the group may be reduced as these departments occupy 40 per cent of space but contribute only 30 per cent of sales (Hall, 1997b).

Burton Menswear is trying to recover from the recession by using a combined strategy of controlling costs and reviewing brands, by upgrading and focusing merchandise ranges to achieve better targeting of consumers. The main cost control strategy has been to increase the use of part-time staff and the ratio of part-time to full-time employees changed drastically during 1993. In 1992, the Burton Group employed 18,091 full-time and 17,873 part-time workers, which by 1995 had changed to 11,673 full-time and 27,612 part-time; a ratio of 70 per cent part time. This was the outcome of negotiating new employment contracts in 1993 (Corporate Intelligence, 1996; Retail Trade Review, 1994a).

The main product strategy has been to focus increasingly on casual and sportswear ranges and as a result youth wear has been consolidated. Furthermore, during the recession a high proportion of stock was sold at discount prices but recently a greater proportion of goods have been achieving full price (Mintel, 1995b; Wileman and Jary, 1997). Stock is sold under the Burton Menswear label or alternatively branded with company own labels, such as Nico for casual wear or Atlantic for sportswear. Suits are all sold under a concession agreement with William Baird, who also employs all staff in the suit department. Additional concessions also take space within larger stores (Corporate Intelligence, 1997a).

One problem at Burton Menswear has been a lack of clear definition of the target market. By aiming to satisfy the mainstream customer it faces competition from Marks & Spencer, BhS, C&A, Next for Men and River Island as well as its own group competitors of Principles for Men and Top Man. Compared to these competitors, Burton Menswear lack price, quality and style consistency and positioning (Wileman and Jary, 1997).

Principles for Men

In the mid 1980's the Burton Group decided to launch a new company as a competitor to Next in the 'fashion forward' end of the ladies and menswear market. The new stores were named Principles.

In 1992/93 Principles employed 2,064 full- and part-time staff in 176 outlets of which 57 were concessions. The average size of outlet was 1140 sq. ft., similar to Next for Men at the same period. The company's market share was estimated in 1993 to be 1.0 per cent from approximately 200,000 sq. ft. (Verdict, 1994). The company underwent review, as part of the Burton Group policy and as a result some relocation and closures of stores took place. Now as part of the Arcadia Group, the company is trading from 135 outlets of which 85 sell the menswear range (Burton, 1996).

The company targets the ABC1 socio-economic groups within the 25 to 45 age range (Burton, 1996). Younger people are attracted to Principles, especially the under 35 year olds, although consumers over 35 from C2DE's also frequent the stores. The main competitors are assessed to be Marks & Spencer, Next for Men, River Island, Burton Menswear and Top Man, in that order (Verdict, 1994). Next for Men, River Island and Principles for Men all appeal to the younger fashion conscious male shopper.

Most of the clothing is sold under the Principles brand name, but the stores also sell a number of concession designer brands, such as YSL; Wilson suits; and ASCO shirts and knitwear. In 1993, Principles was perceived to have prices which were above average for the sector and was not considered to provide as good a value as their main competitors (Verdict, 1994). Product quality was then a problem, which has now been resolved (Hall, 1997a). Principles was evaluated favourably for store design, out performed by only River Island which was thought the best by consumers (Verdict, 1994).

In the spring of 2000, John Hoerner, the chief executive, announced plans to close all the Principles for Men outlets due to under performance across the menswear sector in Arcadia (Mills, 2000).

Top Man

Top Shop/Top Man is part of the Arcadia Group and was one of the fascias created by Ralf Halpern in the 1980's. Top Man occupied around 430,000 sq. ft. of space in 1993, had an estimated market share of 3.0 per cent and sales density of £277 per sq. ft. (Verdict, 1994). The company now operates from 187 outlets, 160 of which are menswear and sales for the company increased in the financial year of 1997 by four per cent to £242 mn. (Hall, 1997a).

The stores target the younger fashion conscious 15 to 29 year olds from the C1C2 socio-economic groups (Burton, 1996). Consumer research indicates that Top Man is relatively classless and attracts consumers from all socio-economic groups. The main competitors are Burton Menswear, River Island, Marks & Spencer, Fosters and Next for Men respectively. The main reasons for shopping in Top Man is thought to be the keen price points and the fashion and styling of goods. This is in contrast to product quality, customer service and value for money, which were perceived to be poor in comparison to Top Man's competitors (Verdict, 1994).

The company has been experiencing problems with product and store appeal and a new layout incorporating video screens was not successful. The marketing department is now trying to design a new format with broader merchandise ranges to tempt customers back into the shops (Retail Trade Review, 1996). Currently attempts are being made to reduce space in Top Man in favour of Top Shop as sales growth doubled on ladieswear in 1996. This will result in Top Man brands being moved to Burton Menswear stores (Hall, 1997b). Most of these brands are own label goods, but Top Man also stocks national brands, such as Wrangler and Levi. Both formal wear and jeans are normally sold under concession agreements (Verdict, 1994).

River Island

River Island is Britain's largest privately owned fashion retail company with the main activity being the retailing of ladies and men's fashion goods. The company is managed by the Lewis Trust Group and has been trading under the name of River Island since 1988, when the Chelsea Girl and Concept Man stores were repositioned.

The Lewis family started trading family clothing in 1954 from an outlet in Tooting (Lea-Greenwood, 1991). Consumer purchasing behaviour changed dramatically in the 1960's and stores were repositioned to appeal to the youth market under the name of Chelsea Girl. These stores were very successful and led to the introduction of menswear, under the facia of Concept Man in 1983. In 1988 a new trading format, River Island, was piloted as a consequence of the downturn in the youth market and increased competition. This was very successful and all stores were progressively converted to the new format (Bernoth, 1997; Lea-Greenwood, 1991).

The company now operates from 350 outlets (MTI, 1998) and has recently opened overseas branches in Dublin and Paris. The River Island menswear department occupies approximately 2,400 sq. ft. and was estimated in 1993 to have a sales density of £288 per sq. ft. (Verdict, 1994).

River Island targets the C1C2, 20 to 35 year old fashionable shopper (Mintel, 1995b), but many customers also come from the A and B socio-economic groups (Verdict, 1994). River Island's main competitors on menswear are Marks & Spencer, Top Man and Next for Men (Bernoth, 1997; Verdict, 1994). The company is continuing its strategy of repositioning in order to appeal to a wider consumer base (MTI, 1998). Store layout and window displays are designed to be eye-catching and originally promoted a Victorian and Edwardian image, but recently these have been simplified and props minimised to appeal to a slightly more mature customer (MTI, 1998).

Verdict (1994) found River Island to be more expensive than most of the specialist retailers such as Burton Menswear, Top Man or Fosters, but cheaper than Next for Men, House of Fraser or Principles. This survey also found that consumers did not rate River Island highly on value for money but extremely well on product style, choice and store design compared to other high street multiple menswear retailers. These evaluations are attributed to the company's in-house design team (Verdict, 1994). Product designs are either manufactured in house or contracted out to manufactures to be made up in the fabric, colour, size and design specified by the company.

The reasons for River Island's success is attributed to tight controls on expenditure, manufacturing and design, whilst at the same time clearly identifying the needs of their customers (Bernoth, 1997). In a survey conducted by Kurt Salmon Associates, River Island was quoted as making about 60 per cent return on capital each year and being one of the most profitable companies when compared with other European clothes retailers (Taylor, 1997).

Next for Men

Next Retail Ltd. was launched by the parent company, Joseph Hepworth and Sons, in 1982. Both Hepworth and Burton relied on selling made-to-measure suits and both had extended their range into off-the-peg formal wear. This market was diminishing and consequently management at Hepworth decided to diversify by launching a ladieswear range. George Davies spearheaded this as the merchandise director. The company decided to sell quality merchandise and to develop an air of exclusivity by presenting products in up-market surroundings using minimalist techniques (Gardner and Sheppard, 1989). The ladieswear trading format became so successful that a number of Next for Men outlets were opened in 1984. The objective was to target the younger, more fashion aware males with a range of clothes that would satisfy customer needs for formal work clothes and casualwear for leisure time. Over the next couple of years, all Hepworth stores were refitted and renamed. Although many retailers were already using segmentation to position their stores, Next became the most publicised retailer to clearly target groups of customers with specific lifestyles (Easey, 1995).

Next was also one of the first retailers to adopt a concept known as 'edited retailing'. This denotes that merchandise is selected by designers, buyers, and merchandisers to offer the customer a limited but co-ordinated look and enables the retailer to have a low stock holding but the opportunity to link or cross sell (Walters and White, 1987; Willans, 1995).

The recession hit Next particularly hard due to over expansion and lack of financial controls. In 1988, George Davies and his wife, the then product director at Next, left the company following a boardroom coup. David Jones, who took over as chief executive, has restructured the business, strengthened the Next brand to ensure good profit growth and increased market share (Cunningham, 1998a). The recovery was based on outlets having a strong store design, identifying core ranges of best sellers and by clearly identifying the customer base and their needs and wants (Bubb, 1992).

In 1998, a profit warning was issued by David Jones. The company admitted having selected a range of ladieswear clothing that was too fashionable for their regular customers. Moreover, they suffered an overstock problem in 1997 and an under-stock problem of best sellers in 1998. This appears to have been a short term problem particularly affecting ladieswear and not menswear (Corporate Intelligence, 1998; Cunningham, 1998b; Rankine, 1998). Customers and the city still have faith in the strength of the brand (Anon, 1998c) and Next was voted Retailer of the Decade by Retail Week in 1998 . The company has recognised that previous growth of 8 to 12 per cent per year is no longer achievable and a more realistic target of 5 to 6 per cent is now anticipated (Lex, 1998).

Next for Men traded from 267 outlets in 1993 and had a market share of 2.3%. The sales area given to menswear was estimated to be 314,000 sq. ft., sales per sq.ft. was around £350 and the average size of a Next for Men outlet was 1,050 sq.ft. By 1997, sales density across the company had increased to £606 per sq.ft. (Davis, 1997). In 1993 the company employed 6,234 full- and part-time staff (Verdict, 1994). The company is now planning to increase the size of its outlets and has taken 2,790 sq. m. on London's Oxford Street; 2,139 sq. m. in the Metro Centre, Gateshead; and 3,255 sq. m. in Buchanan Galleries, Glasgow (Parker, 1997).

Next menswear clothing is mainly sold in joint sites with ladieswear, childreswear and in some cases home furnishings (Next, 1995). The majority of the stores are on prime high street sites near Marks & Spencer or in prestige out of town shopping centres such as Brent Cross, Meadow Hall, Merry Hill, Lakeside at Thurrock and Fosse Park at Leicester. There are also a number of franchised branches in Europe and Asia (Next, 1995). The company plans to increase its overseas outlets to 45 world-wide and this includes opening four stores in Japan and additional outlets in Hong Kong, Malaysia, Thailand, Middle East and Europe (Anon, 1997b). The company owned stores in USA and France are to be closed (Clark, 1998).

Store designs are continually being reviewed and new space utilisation has improved the look of store layouts without making them too congested. Next is now concentrating on the core of their products, having experimented with various logo's and fascia's, and is trying to obtain a uniform environment across all outlets. The buying and design team target the range for customers from ABC1 socio-economic groups within the age of 20 to 35 years (Next, 1995), but the company is also perceived to attract the younger customer and is thus accepted to have a general appeal to the under 35's of all socio-economic groups (Verdict, 1994). The main competition for Next for Men comes from Marks & Spencer, River Island, Top Man, Burton Menswear and Principles respectively (Verdict, 1994).

Next is acknowledged to have a strong design and buying team and only sells its own branded goods with the Next label. Recently Next announced its plan to launch a sportswear range via the Next Directory catalogue with the sub-brand of NX. Retail analysts are concerned that this may lead Next down the multi-branding route which might diffuse the strength of the brand (Astrop, 1997). A golf line is also being developed within the NX range and following successful testing within the catalogue, the sports ranges would be allocated space within the larger stores (Anon, 1997a)

The quality and style of all the Next ranges were improved after an extensive marketing research exercise in 1992, to enhance the offer to their recognised targeted customer (RI, 1992; TMS, 1992). The strengthening of product quality along with strong price points helped Next recover their position on the high street and Next's original mission of offering stylish quality clothes at affordable prices is now back (Retail Review, 1996).

Appendix 4

Phase Two – Consumer Survey

GLASGOW CALEDONIAN UNIVERSITY
Faculty of Business
Department of Consumer Studies

Questionnaire for Burton Menswear

I am a retail student from Glasgow Caledonian University. This survey is part of my course. I wondered if you could spare me a couple of minutes by answering a few questions.

Date	Time	Place	Student 1	Student 2

Part 1: Introduction

1. **Have you purchased any menswear fashion clothing in the last six months?**

   Yes [ ] No [ ]

2. **Have you purchased from any of these stores in the last six months?**

	Yes	No
Burton Menswear	[ ]	[ ]
Principles for Men	[ ]	[ ]
Top Man	[ ]	[ ]
River Island	[ ]	[ ]
Next for Men	[ ]	[ ]

Part 2: Direct Measure of Intention to Buy

3. **Next time you shop for menswear fashion clothing how likely are you to purchase from Burton Menswear?**

Very likely — Very unlikely

Part 3: Importance of Store Image Attributes - Importance Weight

4. **I believe that buying clothes from a company with a good reputation is**

Very important						Not important

5. **I believe that wearing fashionable and stylish clothing is**

Very important						Not important

6. **I believe that to shop in a well designed store with a good layout is**

Very important						Not important

7. **I believe that the price I pay for the goods should give me value for money is**

Very important						Not important

8. **I believe that wearing quality clothes is**

Very important						Not important

9. **I believe that buying clothing from stores that have a good refund and exchange policy and other customer friendly policies is**

Very important						Not important

10. **I believe that shopping in a store that has a good selection of goods is**

Very important						Not important

11. **I believe that shopping in a store where the staff are friendly and knowledgeable is**

Very important						Not important

Part 4: Store Rating on Store Image Attributes - Evaluative Beliefs

12. **The reputation of Burton Menswear is**

Very good						Very poor

13. **The style and the fashion of clothing in Burton Menswear is**

Very good						Very poor

14. **The layout and design of Burton Menswear is**

Very good						Very poor

15. **The price of goods in Burton Menswear is**

Very good						Very poor

16. **The quality of clothes in Burton Menswear is**

Very good						Very poor

17. **Burton Menswear has a refund and exchange policy and other customer friendly polices that are**

Very good						Very poor

18. **The selection of clothes in Burton Menswear is**

Very good						Very poor

19. **The knowledge and friendliness of staff in Burton Menswear is**

Very good						Very poor

Part 5: Personal Details

20.	**Gender**	Male	[ ]
		Female	[ ]
21.	**Age**	16 - 25	[ ]
		26 - 35	[ ]
		36 - 45	[ ]
		46 and over	[ ]

22. **Occupation of the main provider**:

Higher managerial or professional	[ ]
Intermediate managerial or professional	[ ]
Supervisory, clerical or junior management	[ ]
Skilled manual workers	[ ]
Semi and unskilled manual workers	[ ]
Housewives	[ ]
Students	[ ]
Unemployed	[ ]
Retired	[ ]

23. **Postcode..**

Thank you for your time and for completing the questionnaire

Appendix 5

Phase Two – Staff Survey

GLASGOW CALEDONIAN UNIVERSITY
Faculty of Business
Department of Consumer Studies

Staff Questionnaire for Burton Menswear

Date	Place	Length of Employment	Full time/Part time

Part 1: Introduction

1. Who are your main competitors?

	Yes	No
Principles for Men	[ ]	[ ]
Top Man	[ ]	[ ]
River Island	[ ]	[ ]
Next for Men	[ ]	[ ]

Others (please list):..

....

2. Who is your target customers? Please describe them.

3. How would you describe the store image of Burton Menswear?

4. If you did not work for Burton Menswear, how likely would you be to purchase your own or partners clothing from here?

Very likely						Very unlikely

Part 2: Importance of Store Image Attributes

1. **I believe that buying clothes from a company with a good reputation is**

Very important | Not important

2. **I believe that wearing fashionable and stylish clothing is**

Very important | Not important

3. **I believe that to shop in a well designed store with a good layout is**

Very important | Not important

4. **I believe that the price I pay for the goods should give me value for money is**

Very important | Not important

5. **I believe that wearing quality clothes is**

Very important | Not important

6. **I believe that buying clothing from stores that have a good refund and exchange policy and other customer friendly policies is**

Very important | Not important

7. **I believe that shopping in a store that has a good selection of goods is**

Very important | Not important

8. **I believe that shopping in a store where the staff are friendly and knowledgeable is**

Very important | Not important

Part 3: Store Rating on Store Image Attributes

1. **The reputation of Burton Menswear is**

Very good						Very poor

2. **The style and the fashion of clothing in Burton Menswear is**

Very good						Very poor

3. **The layout and design of Burton Menswear is**

Very good						Very poor

4. **The price of goods in Burton Menswear is**

Very good						Very poor

5. **The quality of clothes in Burton Menswear is**

Very good						Very poor

6. **Burton Menswear has a refund and exchange policy and other customer friendly polices that are**

Very good						Very poor

7. **The selection of clothes in Burton Menswear is**

Very good						Very poor

8. **The knowledge and friendliness of staff in Burton Menswear is**

Very good						Very poor

Thank you for taking the time to complete this questionnaire.

Appendix 6

Phase Two – Management Survey

GLASGOW CALEDONIAN UNIVERSITY
Faculty of Business
Department of Consumer Studies

Management Questionnaire for Burton Menswear

Date	Time	Place

Part 1: Introduction

1. Who are your main competitors?

	Yes	No
Principles for Men	[ ]	[ ]
Top Man	[ ]	[ ]
River Island	[ ]	[ ]
Next for Men	[ ]	[ ]

Others:..

....

2. Who are your target customers? Please describe them.

3. How would you describe the store image of Burton Menswear?

4. How would you describe the products you sell?

- by fashion and style
- by price
- by quality
- by selection

5. How would you describe the environment in which you work?

6. How do you think you differentiate yourself from your competitors?

7. How do you train staff to the image you want to project?

8. Do you publish any internal training/information literature for staff in connection with store image and customer profiles?

9. If you did not work for Burton Menswear, how likely would you be to purchase your own or partners clothing from here?

Very likely						Very unlikely

Part 2: Importance of Store Image Attributes

1. **I believe that buying clothes from a company with a good reputation is**

Very important						Not important

2. **I believe that wearing fashionable and stylish clothing is**

Very important						Not important

3. **I believe that to shop in a well designed store with a good layout is**

Very important						Not important

4. **I believe that the price I pay for the goods should give me value for money is**

Very important						Not important

5. **I believe that wearing quality clothes is**

Very important						Not important

6. **I believe that buying clothing from stores that have a good refund and exchange policy and other customer friendly policies is**

Very important						Not important

7. **I believe that shopping in a store that has a good selection of goods is**

Very important						Not important

8. **I believe that shopping in a store where the staff are friendly and knowledgeable is**

Very important						Not important

Part 3: Store Rating on Store Image Attributes

1. **The reputation of Burton Menswear is**

Very good						Very poor

2. **The style and the fashion of clothing in Burton Menswear is**

Very good						Very poor

3. **The layout and design of Burton Menswear is**

Very good						Very poor

4. **The price of goods in Burton Menswear is**

Very good						Very poor

5. **The quality of clothes in Burton Menswear is**

Very good						Very poor

6. **Burton Menswear has a refund and exchange policy and other customer friendly polices that are**

Very good						Very poor

7. **The selection of clothes in Burton Menswear is**

Very good						Very poor

8. **The knowledge and friendliness of staff in Burton Menswear is**

Very good						Very poor

Part 4: Personal Details

1. Store position:..

2. Length of employment with company:...................................

3. Number of staff: Management/supervisors:.........

   Full time:......................

   Part time:......................

   Saturday:......................

Thank you for taking the time to complete this questionnaire.

Appendix 7

Phase Three – Conjoint Analysis

Store Image Questionnaire

I am a student at Glasgow Caledonian University. As part of my course I need to complete an assignment about store image. I would be grateful if you would spend a few minutes of your time answering a few questions.

Interviewer:... **Respondent Number:........................**

Have you recently purchase clothing from Burton Menswear or Next for Men?

Burton Menswear	Yes	No
Next for Men	Yes	No

If yes to either company please continue the interview.

1. **Have you purchased clothing from these stores in the last six months?**

Burton Menswear	Yes	No
Next for Men	Yes	No

2. **On a scale of 0 to 100, how likely are you to purchase clothing in the next six months from:**

   Burton Menswear __________ Next __________

   {Indicate on a scale of 0 = not at all likely to 100 = extremely likely)

3. **The cards give a profile of a fictional store. Please complete the following scores for these profiles** (Use the two practice cards first):

   Practice card 1 Score ☐ Practice card 2 Score ☐

Card 1	Score ☐	Card 7	Score ☐
Card 2	Score ☐	Card 8	Score ☐
Card 3	Score ☐	Card 9	Score ☐
Card 4	Score ☐	Card 10	Score ☐
Card 5	Score ☐	Card 11	Score ☐
Card 6	Score ☐	Card 12	Score ☐

4. **Which profile card best describe:**

   Burton Menswear ☐ Next for Men ☐

5. **Which are the main reasons you choose to shop in Burton Menswear?**

....

....

6. **Which are the main reasons you choose to shop in Next for Men?**

....

....

7. **Is there any improvements you would like to see in Burton Menswear?**

....

8. **Is there any improvements you would like to see in Next for Men?**

....

Personal Details

9. **Gender**
- Male ☐
- Female ☐

10. **Age**
- 16 - 25 ☐
- 26 - 35 ☐
- 36 - 45 ☐
- 46 and over ☐

11. **Occupation of the main provider:**
- Higher managerial or professional ☐
- Intermediate managerial or professional ☐
- Supervisory, clerical or junior management ☐
- Skilled manual worker ☐
- Semi and unskilled manual worker ☐
- Housewife ☐
- Student ☐
- Unemployed ☐
- Retired ☐

12. **Postcode:...**

Appendix 8

Phase Four – Qualitative Interview Format

GLASGOW CALEDONIAN UNIVERSITY
Faculty of Business
Department of Consumer Studies

Date	Time	Company	Name and Position of Interviewee

COMPETITION:
Who are your main competitors?

	Yes	No
Burton Menswear	[ ]	[ ]
Marks & Spencer	[ ]	[ ]
Next for Men	[ ]	[ ]
Principles for Men	[ ]	[ ]
River Island	[ ]	[ ]
Top Man	[ ]	[ ]

Others:..

TARGET CUSTOMERS:
Who are your target customers? Please describe them.

MISSION STATEMENT
Does the company have a mission statement? What is it?

STORE IMAGE/SHOPPING ENVIRONMENT
How would you describe the store image or shopping environment that you are trying to achieve?

MERCHANDISE/DISPLAY
How do you use merchandise and display in supporting the shopping environment?

WINDOWS
Describe the concept of the window displays?

DESCRIPTION OF THE PRODUCT
How would you describe the products you sell?

PRICE COMPARISON
How would you describe your price points in comparison to your competitors?

COMPARISON ON QUALITY
How would you describe your product quality in comparison to your competitors?

COMPARISON ON SELECTION
How would you describe your product selection/options availability in comparison to your competitors?

COMPARISON ON STAFF SERVICE PROVISION
How would you describe your staff service provision or customer service compared to the competition?

WHAT ARE THE PROPORTION OF FULL TIME STAFF TO PART TIME OR ZERO RATED STAFF
Full time includes management.

TRAINING INPUT PER PERSON PER YEAR
How do you train staff to the image you want to project

CUSTOMER PERCEPTION OF THE PRODUCT
If a customer had to describe the product or merchandise for sale in one sentence, what would they say?

COMMERCIAL MANAGEMENT
How are stores managed? To what degree are store managers accountable and be able to make their own decisions?

FUTURE DEVELOPMENTS
What are the directions the company is taking at the moment?

MARKETING COMMUNICATION
How do you communicate with customers?

DIFFERENTIATION
How do you think you differentiate yourself from your competitors?

REASON FOR COMPANY'S SUCCESS
How does the company manage to keep its market share?

Appendix 9

Interview Schedule Summer 1997

Burton Menswear:

Alan Scade Part-time Sales	St. Enoch Centre, Glasgow	Monday 14 July 1997
Willie Mark Store Manager	St. Enoch Centre, Glasgow	Monday 14 April 1997
Danny Bowie Acting Store Manger	Sauchiehall Street, Glasgow	Monday 14 April 1997
Michael Hughes Area Sales Manager	Paisley	Thursday 31 July 1997
Rachel Britton Marketing Communications Mgr.	Head Office, London	Wednesday 4 June 1997

Next for Men:

Carol Rothery Part-time Sales	Sauchiehall St., Glasgow	Monday 23 June 1997
Sarah Peacock Store Manager	Argyle Street, Glasgow	Friday 4 April 1997
Margaret Chrystal Store Manager	Sauchiehall St., Glasgow	Wednesday 30 April 1997
Paul Seston Area Manager	Argyle Street, Glasgow	Monday 7 July 1997
Francis Williams Group Marketing Research Manager	Browne Jacobson, Nottingham	Monday, 21 July 1997

Appendix 10

Phase One Findings
Store Image Attributes - Key Words Used

Attribute Dimension: Merchandise Quality

Quality	Standards
quality	durability
quality clothes	durability of clothes
quality of product	standards
quality of garments	practical
quality of stock	
quality of merchandise	
quality of goods	
consistency of product and quality	
good quality	
genuinely good quality clothes	
excellent quality	

Attribute Dimension: Merchandise Price

Price	Value
reasonable price	value for money
decent prices	value
happy with price of clothes	
good prices	
competitive prices	
competitive	
expense	
affordability	
low price	
inexpensive	
cheap	
fairly cheap	
cost	

Attribute Dimension: Merchandise Fashion and Style

Fashion

fashion

fashionable products

fashionable clothes

fashionable

trend-factor

trendy

trendy fashion

modern clothes

stylistic style

stylish clothes

style for younger generation

quality names

casual

style of clothes

nice clothes

individuality

originality

attraction

Brand names

brand names

named brands

quality brands

trade name

designer

designer labels

labelling

labels

name quality

quality designer labels

Up market

up market

upper class

exclusivity

prestige

high profile store

Customer

type of customer

customers' age

style of shoppers

Image

shop image

image

quality image

no price

packaging

carrier bag

Attribute Dimension: Merchandise Selection

Selection

selection

good selection

good selection of styles

poor selection of footwear

choice

good choice

choice of goods

variety of merchandise

variety

good range

wide range

good and varied range

product range

range of clothes

different types of clothes

amount of stock

quantity

type of product

product it sells

Size

sizes

size labels

good selection of sizes

range of sizes

consistent sizing

Availability

whether product is in stock

has the product I look for

Attribute Dimension: Refund policy and Company Procedures

Refund Policy

easy to get refunds

shop refund procedures

good service - money back

after sales service

exchange

Procedures

shop procedures

shop policy

availability of guarantee

switch

credit cards

card usage

discounts

student discount

Attribute Dimension: Reputation

Reputation

shop reputation

reputable company

respectable clothing

established good name

credibility

discretion

nation-wide chain store

Attribute Dimension: Professional and Friendly Staff

Professional Staff

professional staff

efficient staff

staff knowledge

personal advise

quality staff

well staffed

staff

Attractive Staff

attractive staff

look of staff

staff image

staff appearance

Friendly Staff

friendly

friendly attention

friendliness

unfriendly

helpful

staff helpfulness

staff help

helpful staff

unpleasant staff

personality of staff

staff courteousness

made to feel appreciated

appreciative staff

relationships with staff

attitude of staff to customers

Customer Service

staff service

good staff service

good service

customer relations

customer care

customer service

Pressure to Buy

pressure to buy

pressure sale

pushy staff

leisurely pace

relaxed

no pressure-ease of - shopping

service experience

sales care

quality of service

shop assist. don't harass you too much

Queues

queues

checkout

more checkouts

speed of service

no queuing

Attribute Dimension: Internal Layout and Design

Layout

shop layout

layout of store

layout of shop

good sensible layout

tidy layout

open layout

well laid out

ease of shopping

interior floor space

room for prams

size of shop

well set out

Design

shop design

interior design

design of interior

interior design

style

style of shop

environmental designs

decorations

Store Appearance

store appearance

shop appearance and style

shop appearance

interior

style in shop

appealing interior

interior decor

overall look of shop

colour

lighting

well lit

security

new ideas

Attribute Dimension: Opening Hours

Opening hours

opening hours

Sunday trading

Attribute Dimension: Location and Parking

Location

location

good location

in town location

good site situation

accessibility and location

easily accessible

accessibility

easy access

convenient

convenience

handy

Parking

parking

Attribute Dimension: Atmosphere

Atmosphere

atmosphere

atmosphere in retail- establishment

good atmosphere

good store atmosphere

pleasant atmosphere

relaxed atmosphere

friendly atmosphere

nice atmosphere

welcoming atmosphere

comfort

shop comfort

ambience

aura

Music

loud music

music too loud

good music

Noise

noisy

not too noisy

busy

quiet shop

Clean and Bright

clean and bright

cleanliness

Warm

air-conditioning

temperature of shop

not too warm

comfort

hygienic

smell

Attribute Dimension: Merchandise Presentation

Merchandise Presentation

merchandise presentation

ironed presentation

'not too tacky'

tidy

untidiness

Displays

interior displays

displays-floor space

Attribute Dimension: Store Facilities

Facilities

facilities

amenities

facilities for disabled or-children

wheelchair use

space for wheelchairs and-prams

escalators

ease of exit and access

Departments

goods under one roof

everything under one roof

shoe department

what is on offer in store - e.g .coffee shop

Attribute Dimension: Promotion

Promotion

promotions

media advertising

special offers

offers

Attribute Dimension: Window and Facia

Window	Facia
window attractiveness	front of shop
window display	outer appearance
window presentation	external appearance
window dressing	attractive shop exterior
window advertising	exterior outlook
window advertising	

Appendix 11

Phase One Findings – Store Choice

UK Market Share and Patronage of Stores in Glasgow

Name of Store	UK Market share 1994*	Number of users	Percentage of users
Marks & Spencer	16.9	141	41.1
Next for Men	2.5	126	36.7
River Island	1.7	118	34.4
Top Man	3.0	97	28.3
Burton Menswear	7.6	96	28.0
Slater Menswear	IND.	72	21.0
Cruise	IND.	58	16.9
Bhs	2.7	51	14.9
Debenhams	4.2	40	11.7
Smith's Menswear	IND.	33	9.6
Principles for Men	1.0	26	7.6
Fosters	2.2	19	5.5

*Source: Verdict Report (1994)