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THE FASHION RETAILSCAPE: **INNOVATIONS IN SHOPPING**

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Bernadette Schrandt

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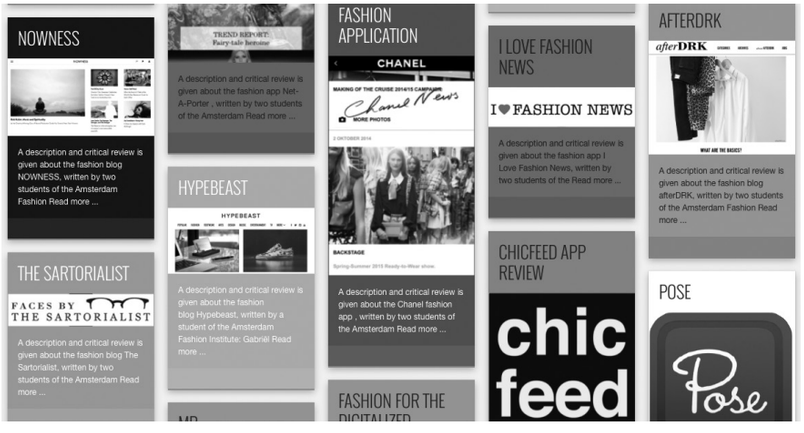

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INTRODUCTION: THE FASHION RETAILSCAPE

An interactive full-length mirror that allows your customers to browse through an endless collection of clothing that you offer and see immediately whether something fits them, including when they turn around, and which also allows them to quickly send a picture to their family and friends in order to hear what they think. This mirror is a technological development that is already possible and which is being launched in various fashion outlets. But how probable is it that this technological innovation will become a permanent feature of our shopping experience? How probable is it that a retailer will invest in such a mirror? To answer this question we shall describe the expectations regarding the developments in shopping in the next few years. We shall then examine to what extent these developments already play a role in shopping now, in 2015. In order to maintain clarity, we shall present a structured overview of innovations. All of the innovations mentioned are ultimately aimed at offering added value for the consumer, but who is the consumer and what does he or she need? An inventory of how the shopping consumer is viewed makes it clear that new perspectives are required in order to do justice to the complexity of shopping behaviour and the shopping experience. Finally, we will briefly examine specific cross-media aspects of shopping, such as the multichannel strategy of retail outlets and the role of the physical store in relation to the webshop. We end by explaining how researching the developments through the concept of servicescapes can answer a number of essential questions on the probability of innovations more systematically.

We will enrich the developments we sketch and the arguments we use in two ways. Firstly, examples of current innovations are given throughout the text. Secondly, insights from interviews with Amsterdam fashion retailers are presented at the end of each main section. In 2014, students of the Amsterdam Fashion Institute (AMFI) interviewed retailers in Amsterdam to ask about the future of fashion retailing. In total, 16 fashion retailers in various segments - from small boutiques to well-known international brands - were interviewed (they have been anonymised in this publication). During these interviews, students were specifically interested in the usage of new and digital strategies to engage with (potential) customers. Four main insights and challenges for the near future were clearly highlighted by these interviews.

LOOKING AHEAD

SHOPPING IN 2020

The year 2020 is the new 2000. When we drew back the curtains on January the first 2000, we discovered that the world had changed completely. For hundreds of years we had speculated about what 2000 would look like and all of the possibilities that modern times and, specifically, technology would bring us. And finally we were able to see with our own eyes all of the future scenarios around us. On the first of January in 2020 our world will once again look different, even if it is just the way in which we shop (Shopping2020, 2013).

The proximity of 2020 means that the predictions have a more realistic character compared to the science fiction associated with 2000. A number of those predictions are extrapolations of current developments that will almost certainly unfold over the coming years, in other words trends. Demographic developments are an example of this: an increase in the population of the Netherlands (17.1 million by 2020), the number of people over 50 that will be larger than the number of 20 to 49 year olds and the increase in the number of single person households (GfK, 2013). Although these are general trends they do have direct consequences for the retail sector: older people have specific wishes with regard to the delivery of goods ordered online and, because of the increase in single person households, the home delivery of goods ordered will become a bigger problem (Schut et al., 2014).

Over the coming years, economic developments will also occur within a limited bandwidth. Expectations are that there will be virtually no growth in consumer expenditure (Wolters, 2013; Erich, 2014), spending power will stagnate or drop, more international players will join the Dutch market, and the retail offering on the periphery will become leaner (GfK, 2013). This not only means that consumers will primarily base their choices on price and that they will mainly be interested in new services that can save them money (DigitasLBi, 2014), but it also means that investments in the retail sector will decline or only be made by the major players in the market. And major players or retail chains behave differently in the market compared to small independents, with all of the consequences this entails for the development of retail as a sector. And

that is before we consider the increasing number of empty retail premises, which is expected to increase from 6.3% to 10% by 2020 (Shopping2020, 2013).

In the predictions there are major uncertainties, for instance about the role of ecological developments (the role of sustainability, 'green' policies) and political developments (including privacy legislation, rental legislation for retail premises and opening hours policy). However, technology remains the best subject for the party game in which we envisage the situation in the (near) future. Technology and what that will bring us plays a recurring and leading role in all kinds of speculation about retail developments (e.g. Hofste & Teeuw, 2012; GfK, 2013; Shopping2020, 2013; PwC, 2014; Shopping2020, 2014b). The current star players are big data, 3D printing and wearables.

Big data is the analysis of linked databases in order to provide new insights. The integration of (real-time) structured data (for example payment transaction data) and unstructured data (for example, social media sentiment about a brand) is the Holy Grail of being able to understand patterns in the customer journey, the ability to identify trends and new target groups and for building up a profile of each customer so that the range of products on offer and the prices can be adapted in real time.

Much is expected of wearables

3D SCANNER FOR BRA-SIZE

Bra shopping; it takes a lot of time, patience and awkward moments when the sales person wants to measure your exact bra-size. So wouldn't it be great if there was a solution for all this? Lincherie claims to have it! The Dutch lingerie label Lincherie launched a new technique for measuring the bra-size of customers in a fast and precise manner in one of their Amsterdam stores. You no longer need staff assistance when you want to know your exact size. How does it work? A 3D body scanner is hidden in a mirror inside the fitting room. The mirror itself tells the customer to spread their arms slightly and spin slowly. In less than a minute it takes 140 measurements of the upper body. The customer then receives her exact bra-size. Besides all of this, the mirror can also give customers information about what's in stock. Lincherie's store manager claims that this mirror makes lingerie shopping less frustrating for women who are particularly shy .

The 3D printing trend is seen as the future disruption to the production chain because customers can print (parts of) a product themselves without the intervention of a manufacturer or supplier, apart from the 3D model design. The phase of 3D printing of gadgets and miniatures is slowly coming to an end and 'normal' products are increasingly forming part of what is available: at Shapeways.com it is possible to order a 3D printed bikini. For fashion retail, it appears that the development of 3D scanning is a trend that is just as important. Because measurements are different in each country and for each brand it is often difficult for consumers to find clothes that fit properly without actually trying them on, and all of the consequences this entails (such as returns for online orders). A 3D scanner performs a 360-degree scan of a person's body, on the basis of which advice is given on the sizes of the different brands to be chosen (for example, see www.me-ality.com).

Much is expected of wearables (Shopping2020, 2014b). There is a great deal of press interest in wearable virtual reality (Google Cardboard, Oculus Rift). An increasing number of major names such as Samsung and Apple are, for instance, focusing on smart watches. Although these examples are the most high profile, wearables also include sensors in shoes and clothing. These sensors can be used to provide more information about an article of clothing when held up in front of an interactive mirror in the store or they can be given a health monitoring function – from step counters in training shoes to sensors in clothing that measure heart rate, blood sugar and emotions. It remains to be seen which of these will be truly useful, for example the vibrating 'HAPIfork' that uses Bluetooth to monitor whether you are eating healthily by recording how quickly you eat (see www.hapi.com/products-hapifork.asp). And all that for just 100 dollars.

STEALTH UNPOCKET

The Affair, funded by Kickstarter, introduce with their new collection '1984' the UnPocket™' stealth technology that secures your phone, passport and bankcards with police-grade high performance shielding to ~100 dB. In other words: you become untrackable and unhackable. UnPocket is a stealth pocket that securely blocks all Cellular, WiFi, GPS and RFID signals. A whole collection of clothes is built around these removable and water resistant pockets, so you can carry devices with you in style. People can be tracked easily because of the GPS or WiFi on their phone. Personal data on your contactless bank card or e-passport can be stolen or skimmed. This can be prevented, according to The Affair, by using UnPocket. Just pop your phone, passport and bank cards in the pocket and you become invisible to Big Brother. The Affair-1984 state on their website that their goal is to create: "Fashion for an under-surveillance society. Because let's face it, Big Brother knows way too much already…"

All three developments are already underway, which means that this future is already here, however hesitantly that may be in some cases. The real question is whether they will survive the hype cycle and, subsequently, how and when they manage to acquire a permanent presence in the behaviour of organisations and consumers.

In addition to these three current developments, we also encounter a number of familiar faces in the predictions about important technological developments. One example is 'The Internet of Things', the increasing interfacing of objects with the Internet as a result of which 'everything talks with each other' (and which also makes everything hackable, like in the Ubisoft game *Watchdogs*). An iconic example of that general connectivity is the refrigerator that places orders when, for example, you are about to run out of milk. The initial performance of these types of commercial products dates back to 1998 by the Japanese firm V-Sync (with a Pentium II proces-

sor!). In this case it seemed that science fiction followed the current events with an appearance by a 'smart' refrigerator in the film 'The 6th day', released in 2000. These days, the smart refrigerator is the example that is cited when underlining the fact that technology can be way off target: "Truth is, no one wants to communicate with their fridge. No one wants the obligation of keeping their fridge informed unless they're seriously short on inter-personal relationships." (The Guardian, 2012). Perhaps it is indeed not necessary at all that every object has to be connected directly to the Internet. The possibility of uniquely identifying an object via a barcode, QR code or through augmented reality and thus be able to retrieve additional information via the Internet, is probably sufficient for discovering whether we are buying a piece of healthy meat, whether the item of clothing is cheaper elsewhere or whether your friends enjoyed reading a certain book. Another long-term technological development or discussion is the one concerning Trusted Identity - the ability to establish the identity of a person in a safe and reliable manner both online and offline. This development is, of course, very important for payments and the new payment methods that are being created such as via Near Field Communication (NFC). However, it also plays a role within the framework of, amongst other things, personalisation and loyalty programmes. Knowing what one and the same person does online and in-store can result in a much better personalised offering. Convenience is the name of the game because, for example, standard information does not need to be entered for every webshop or because multiple devices are required for payments (cash, cash/chip card, switch card, credit card, mobile, Bitcoin, etcetera). Behind Trusted Identity there are major discussions taking place about technological infrastructure, security, fraud and privacy, which also affect more legal principles such information ownership or more moral principles, such as who 'owns' your DNA profile.

Knowing what one and the same person does online and in-store can result in a much better personalised offering

For example, the Dutch department store the Bijenkorf in Rotterdam has implemented iBeacons. These small devices recognise customers when they approach the cash register (www.emerce.nl, 2014). The staff can, among other things, see which preferences the customer has and what the customers bought previously at the Bijenkorf. Not long after the Bijenkorf implemented iBeacons in their store, papers started to write about privacy issues in relation to the use of iBeacons (De Volkskrant, 2014). Does the profile that an online shop or a social media platform builds up about me on the basis of my click pattern and purchases belong to that company or to me?

Apart from using iBeacons to collect information about the customer, it also can be used to send information *to* the customer. In the byAMFI store in Amsterdam we tested the effect of sending information to customers on their shopping experience via beacons. Every time a customer approached a certain collection, he or she received extra information about that collection on a mobile phone. The beacons provided text and photographs about the designer and the concept behind the collection. Customers who were interviewed responded partially positively to this manner of information transfer. They said, for example, that they think that this manner of information provision suits not only the store, but also the future. They wished that more stores had a system like this. One of the interviewees even said that she was willing to pay more for the clothes now she knows more about the concept behind the garments. Another claimed that she really liked receiving information in this manner, because she loves to shop anonymously and using the beacons meant that she did not have to ask the staff for extra information. Besides these positive reactions, there was also criticism: "You have to have time in order to use this app. If you don't have time, the app can be annoying"; "I prefer to decide for myself about which garment I want to receive more information and about which garment I don't." The study's overall result of the survey is that the group of customers that shopped with the app perceived the store's atmosphere in a significantly more negative manner than the group that shopped without the app. Also, customers who used the app where significantly less willing to recommend the store to others than customers who did not use the app. Despite some of the positive reactions of customers, there were no positive effects of beacons found in this study (Moes & Van Vliet, 2015). A clear indication that technological innovations do not necessarily lead to a more positive shopping experience.

MEET ALEX & ANI WITH iBEACON

Everybody is talking about it: iBeacon. As with most new technologies, fashion retailers are not sure whether to invest in it or not. Alex & Ani, an American fashion retailer focusing on authentic jewellery, gave it a try. The main goal for Alex & Ani to use iBeacon was to get consumers into the store who are not familiar with the brand – something many brands strive for. Additionally, it is expected that the software will create a rich profile of shoppers' browsing and purchasing behaviour. Gender-specific information combined with time and location spent in-store plus purchase preferences should give Alex & Ani more insight into the behaviour and wishes of their (future) customers.

Alex & Ani (www.alexandani.com/our-story) is the first companyin the US to start working with iBeacon nationwide (Swirl, 2014). Their aim is to make people who do not know Alex & Ani yet more aware of their existence. However, before rolling out, the company did some tests from May to July 2013 in order to determine the success rate of the technology. They found that over 75% of shoppers read Alex & Ani's offerings and half of these shoppers redeemed the promotion (20% discount on a bracelet). Although actual sales conversion rates are not known, Alex & Ani therefore seem to be enthusiastic about the possibilities of iBeacon for their company.

KNOWING YOUR CUSTOMER IN 2020

A common way of still being able to obtain a clear picture of (uncertain) future developments is to draft scenarios. A very common form of this is to take a development with an uncertain direction, for example, how people will deal with their possessions in the future. Two extremes are then formulated, for example, 'buying will continue as usual' or 'there will be an economy based on bartering and sharing'. When this is done for two developments these axes can be

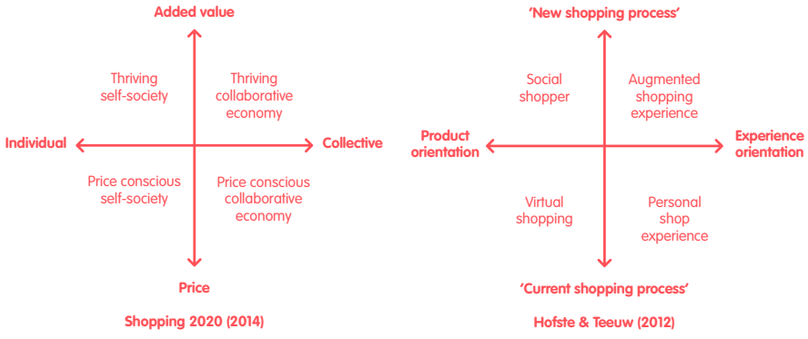


Figure 1: Future shopping scenarios

intersected in a coordinate system, which produces four possibilities that can be further defined. Here we describe two of these types of scenarios for the retail sector: one focuses on retail in general, and one focuses on fashion shopping patterns facilitated by technology.
The 'Business Models of the Future' report (Shopping2020, 2014a) states two uncertainties:

1. Do consumers act on the basis of a) individual interest – are they focused on control and not willing to share, or b) collective interest – are they focused on sharing and teamwork?
2. Are consumers looking for a) the lowest price or b) are they willing to pay more for extra added value such as convenience, luxury and sustainability?

Four scenarios emerge when we intersect these two uncertainties (Figure 1). The first scenario, a thriving collaborative economy is about consumers having access to services and products that they wish to use, which they do not necessarily have to own, but which they can hire and use on a temporary basis. This can be for reasons of convenience or because of sustainability considerations. In the price-conscious collaborative economy (scenario number 2) the power of the collective is used to negotiate good deals through collective purchasing and agreements relating to, for example, energy and insurance. Products, such as cars, are also shared because it is less expensive to do it that way. Objects are also shared between people because this makes good economic sense (see https://peerby.com). In the third scenario, price-conscious self-society, the main aim for the individual consumer is to find the best deal, and it makes no difference whether it is a different supplier or a different brand each time. Online marketplaces are consulted in order to find that best deal (see www.beslist.nl). The lowest price is what counts, much more than convenience and sustainability. In the last scenario, the thriving self-society, the individual consumer is looking for convenience, luxury and experience, for which he or she is willing to pay. Online marketplaces are used to find unique products and services. This type of consumer is happy to be advised and often takes out a subscription in order to be able to continue to enjoy the experience (see www.winecast.com).

Hofste & Teeuw (2012) also present four scenarios; however, these are more closely tailored to the consumer and how he or she shops. As a consequence, these scenarios are less abstract compared to the scenarios discussed above. This is a direct consequence of the uncertainties that were chosen:

1. Does the consumer act on the basis of a) purchasing a product or service, or b) focusing on the experience?
2. Does the current shopping process change or not under the influence of, for example, the mobile phone?

Both axes are, in fact, not chosen very well. The first axis does not so much describe an uncertainty but two different 'consumers' (see discussion below). For the second axis, the outcome was already known at the time of publication in 2012: yes, the shopping process is changed even just by using a smartphone in the shop (to compare prices), or for advance online orientation (comparison sites). This is, therefore, far from being an uncertainty, already a reality (in 2012). Four more possible scenarios can also be generated on the basis of these two axes (Figure 1). In the first scenario, the 'Augmented Shopping experience', the consumer's experience is central. The store makes optimum use of virtual techniques in order to show how the personally selected clothing suits you. Interactive full-length mirrors, 3D models and virtual catwalks intensify the experience. In the 'Personal shop experience' scenario the consumer buys as he currently does, but the store is enriched with extra experience moments through smell, sound and visual stimulants matched to personal aspirations. For 'Virtual shopping', technology is used to enable the consumer to make a selection from a large range by creating a virtual fitting room and the ability to show the choice immediately to friends via a Tweet mirror. In the last scenario, that of the 'Social shopper', social media play an important role in the buying process, both online and offline. Review sites and the opinions of family and friends are consulted in order to decide what to buy. Brands and shops monitor this and try to influence it and to learn from their customers by analysing thoughts and statements.

ONLINE IN THE PAST, PRESENT AND FUTURE

It is undeniable that online developments are playing a major role in the future scenarios that have been outlined. What have those developments been and what are the future prospects? Weltevreden (2012) identified four phases in the evolution of online shopping. In the first phase, between 1994 and 1999 only 16% of people in the Netherlands had access to the Internet at home. In this period, the vast majority of the activities consisted of surfing the net and using e-mail. Retail chains and mail order firms in particular had websites, although only 4% also used the website as a sales channel. The website during this period was mainly used as a referral to the store (opening times, location). There was virtually no online shopping: in 1998, only 2% of the Dutch population bought via the Internet. By 2003, this had already risen to 31% due to a substantial growth in the number of households that became connected to the Internet between 1999 and 2003: around 68%, of which one-third was already using a broadband connection. By this time, an increasing number of retail chains and independent retailers had a website, which was used to provide more information about products and services and for e-mailing newsletters to keep customers informed and to build loyalty.

In the period between 2004 and 2009, the number of households with access to the Internet had increased even further to 91% and webshops and social media were becoming popular. By 2009 more than two-thirds of the Dutch population were shopping online, and the amount of spending online and the average amount spent was increasing substantially. This period showed the mass emergence of (smaller) web-only firms, which resulted in a threefold increase in online sales. However, the traditional retail sector lagged behind when it came to developing webshops: only 18% of the retail chains and only 6% of the independent retailers had a webshop in 2006.

3D SHOPPING FROM HOME

Want the total in-store experience without having the trouble of traveling to the store and having to deal with crowds? In 2012, Keytree developed an interactive system that enables users to shop virtually in their living room. By developing what is known as an 'immersive' 3D environment, users can walk virtually through the supermarket and order their items. In this way, shoppers do have the experience of being in a store, but don't have to actually go there and queue up to get their products. Keytree works with Kinect technology, thereby making it possible to navigate through the environment without using a mouse or PC. Rather, your body becomes the console. The store data is provided by Tesco, Amazon and eBay and by tracking the personal behaviour of both the individual and the total amount of shoppers, and personalisation is offered by both the individual preferences and suggestions based on what others bought.

The impact of online sales on physical shops was substantial

In the final phase, between 2009 and 2012, virtually every Dutch person was connected to the Internet, where a shift could be detected towards the use of the laptop and the smartphone as the preferred device, rather than the desktop. In 2012, three-quarters of the Dutch population shopped online and although the number of orders placed and the amount of the spending were still increasing, the rate of growth was levelling off. The number of webshops operated by retail chains and independent retailers was increasing. However, retailers with a physical store still remained in the majority (61% in 2011) compared to 17% web-only firms in the retail sector. By 2011, around 22% of retailers had both a physical store and a webshop.

Weltevreden (2012) concludes that the impact of online sales on physical shops was substantial, in addition to factors such as the economic crisis, increased rents for physical stores, opening time legislation and suchlike: "In sectors in which (parts of) the product or the service can be digitised, such as financial products (digital policies), holidays and travel (e-tickets), photograph/film (digital photographs) and media goods (music, films), the number of stores has declined considerably in the last decade. Telecom is the only exception; in this sector the number of stores has increased substantially, which is in part due to the growth in demand for mobile Internet devices." (p. 20). Conversely, it applies that "Especially in (…) sectors that are interesting for recreational shopping, such as clothing, shoes, personal care and sports products, there is an increase in the number of stores" (p. 20).

We can extrapolate the historical development outlined by Weltevreden to the present day and to the future and can do so on the basis of the results of the Shopping2020 research programme. This research programme asked how consumers would be shopping in 2020. This question has become relevant and urgent in the context of the current economic crisis and developments such as changing consumer behaviour, changes in the value chain, the emergence of new technology, the digitising of products and profound (international) competition.

The Shopping2020 study reveals that in 2012, of the total consumer spending[1] 17% was online, and 83% was in physical stores.[2] This spending represents an online turnover of 11 billion Euros out of a total of 65.9 billion Euros. The product categories that have the largest share in this are insurance, travel and ticket sales (flight ticket, accommodation). Of the 11 billion Euros of online sales, 4.8 billion Euros were generated in the retail sector. Fifty per cent of that 4.8 billion Euros is shared between ten sellers: RFS Holding (Wehkamp, Fonq, Create2fit), Bol, Zalando, Albert.nl, BAS group (Dixons, MyCom, Dynabyte), Coolblue, KPN, H&M, Hema and Ticketmaster Nederland. If you then look at fashion retail, it represents approximately 10% of total online sales: 0.9 billion Euros for clothing and 0.3 billion Euros for shoes and personal lifestyle (Shopping2020, 2013; Wolters, 2013; Schut et al., 2014).

It is expected that the online share will increase substantially over the coming years. The forecast growth to 2020 does, however, depend on who one asks. According to consumers, the online share will increase from 17% to 50%, but according to experts the share will only increase to 36% (Wolters, 2013).[3] The expectations differ considerably for each product category. The biggest growth is expected in the product categories that were already doing well online in 2012: event tickets, package holidays, individual flight tickets and accommodation and insurance are expected to increase from the current 50% to between 70% and 80% of the share of online sales. For fashion, according to the experts, the current share of 10% of online sales will increase to 27% for both clothing and shoes & personal lifestyle (Wolters, 2013). An estimate that can also be found in a recent ING report on shopping domains (Erich, 2014). The same pattern, but with different figures, can be seen when consumers are asked about the products that they will no longer be buying in a physical store in 2020. The top of that particular list has the same product categories stated by the experts: event tickets, package holidays, individual flight tickets and accommodation and insurance. Around 40% of consumers say that they will no longer be going to physical stores for these products. For fashion, the number is considerably lower: 17% (shoes and personal lifestyle) and 12% (clothing) (Peters & Witte, 2013).[4] We shall return to the potential reasons for this when we discuss the role of the physical store.

Besides online shopping, there is another interesting development happening in the world of online fashion. Fashion apps and fashion blogs are becoming more and more popular. Fashion apps are applications that offer a shopping and/or inspirational platform for the app user.

Like other apps, these can be downloaded onto smartphones from an app store (Magrath & McCormink, 2013). These days, fashion blogs function as a central platform where fashion-related news and information circulates (Rocamora, 2012). Fashion blogs can inspire their readers. Advertisements that are 'hidden' in the blogs can affect consumer's (brand) attitude and shopping behaviour. These blogs have the ability to create a strong personal relationship with their readers. Advertisements viewed in such a personal and non-intrusive context can influence consumers in a more subtle way than traditional media can (Halvorsen et al., 2013).

FASHION BLOGS: AUTHENTICITY IS FOR SALE

Last year, Yara Michels wrote an article in her blog This Chick's Got Style about her ninth ear piercing. She also told her readers where she bought her other eight piercings, among which was a particular shop in Amsterdam. A few days later Yara received an e-mail from this particular jewellery maker: a lot of people showed up to her store and everybody showed Yara's picture, they all wanted to have the same earring.

This is an example of how fashion blogs influence the shopping behaviour of consumers. Because of their influence, fashion blogs can function as a marketing communication tool for retailers. A recent study by Maaike Driessen revealed some interesting results. A survey answered by 108 fashion blog readers, showed that fashion blogs influence the shopping behaviour of consumers. Apparently, 93 percent of fashion blog readers bought something after they saw it in a fashion blog. Besides this, the results show that fashion blog readers are influenced by product reviews and they are more likely to buy something after they have seen it in a fashion blog.

In interviews with the bloggers, they said that they started blogging because they wanted to do something beside their study, they wanted to share their style or were bored. Fashion bloggers are becoming marketing tools since they work together with retailers and are paid for writing articles. None of the fashion bloggers spoken to dreamed of getting paid for what they loved to do. A lot of them do now, and all fashion bloggers are happy to work with retailers. But bloggers have a few terms and conditions. First, the retailer should suit their style and second they like to get something in return.

Retailers are also eager to work with fashion bloggers but the research shows they do not really know how to use fashion bloggers for their marketing strategy. The website www.blogmakelaar.nl was created as a result of this research. This website allows retailers to get to know more about fashion bloggers as a marketing communication tool.

THE FUTURE IN 2015

What is missing among all of these (extrapolated) numbers is a more qualitative picture of the changes that will take place: What will the innovations be that will ensure that more is sold online or that consumers still go to stores? It is true that all of the Shopping2020 reports are interspersed with examples of innovations, from a more science fiction type character (the 'Sight'-video on http://vimeo.com/46304267) to the constantly recurring Google Glass type innovations. However, the examples are used for illustrative purposes only. There is no systematic inventory of the changes currently taking place in the retail sector, and that can be regarded as being the forerunners of what will become reality by 2020.[5] The scenarios outlined earlier have such a system within them, but, what is more, the future perspectives outlined are often abstract (Shopping2020, 2014a) or have a limited view, such as a technological view (Hofste & Teeuw, 2012). The choice of a limited number of uncertainties when developing scenarios also means a full description of all innovations can never be given.

There is no systematic inventory of the changes currently taking place in the retail sector

In September 2013, the Cross-media research group of the Amsterdam University of Applied Sciences (AUAS) in collaboration with the Amsterdam Fashion Institute (AMFI) started a study on innovations in fashion retail on the basis of two fundamental principles. The first fundamental principle concerns the method of classifying all occurrences observed, for which a mix of a taxonomy and a typology was chosen. A taxonomy is a systematic classification of aspects based on observations. By observing multiple occurrences, many of their aspects can be classified into similarities and differences. The result is often a hierarchical classification, such as the taxonomy of species in flora and fauna. Whilst a taxonomy starts on the basis of observed occurrences, a typology starts on the basis of a concept. The distinctive properties that potential occurrences could normally possess are devised and the actual occurrences are then classified in accordance with these rules. We then talk about 'types' as opposed to 'kinds', as in the case of a taxonomy. One can say that taxonomies are created empirically or inductively and that typologies are created conceptually or by deduction. In order to make an inventory of the innovations in fashion retail we have opted to work at the highest level using conceptual classification (typology) and then to use two levels 'below' that have resulted in 'kinds' of innovations on the basis of observations (taxonomy). The decision to work at the highest level using a typology arises from the framework that has been developed for examining new services by the cross-media research group (see Van Vliet, 2014).

The second fundamental principle concerns the typology to be used for the innovations. We have opted for the STOF model as it is a well-founded framework in business model innovation research. The STOF model is part of the STOF methodology, a design method for business models. The STOF model describes business models on the basis of four associated domains: the Service domain (the added value of the service), the Technology domain (the technical functionality and architecture required in the service), the Organisation domain (the network of parties involved and the processes for delivering the service) and the Financial domain (the method of income generation and the sharing of risks, investments and income amongst the various actors in the network). It is from these four domains that the methodology derives its name (Haaker, 2012).

For the time being, these fundamental principles have resulted in the following classifications for the innovations that have been found (Table 1). The actual inventory of innovations in fashion retail is published on the website www.fashionretailfuture.com. The regularly updated inventory

on the website can be viewed as 'data' that can be part of future research. In the next section we shall examine the four innovation domains in more detail, give a few examples and describe a particular development for each domain in more detail.

Service Domain	Technological Domai	Organisational Domain	Financial Domain
Personalisation Customer Cards Personalised products **Experiences** The shop as an event Atmospherics Playful experiences Social experiences **Crowdsourcing** Designed by customers Co-creation	**In-Store** Interactive mirrors Shopping walls Interactive shop windows Customer tracking 3D body scans Smart hangers Touchscreens Smart Garments **Online** 3D shopping Virtual mirrors 3D fitting **Mobile** Scanning Holographic and augmented reality LBS/Routing **Public Space** Shopping walls Public screens	**Collaboration** Outlet platforms Affiliates **Logistics** Smart integrated inventory Smart inventory management Click & Collect Stockless store Pop-up store **Value Chain** Fast fashion Reverse supply chain	**Payments** Alternatives Coupons **Crowd funding** **C2C**

Table 1: Classification of innovations in fashion retail

INSIGHTS AND CHALLENGES AMSTERDAM FASHION RETAILERS: ONLINE PRESENCE

Most of the retailers that were interviewed by AMFI students have a – still simple – webshop. Some because they want to make sure that they have an online presence, while others really see it as a way of increasing sales. However, most retailers struggle with how to handle this effectively: making sure that people find your website and are seduced to buy your products on it. Retailer T: "Recently, I asked two boys, with no knowledge of what I was doing, to buy a pair of jeans from our webshop. And after doing so, they said that it was unclear to them whether or not they could actually buy a pair of jeans on our website. So for them, it was a website, not a web*shop*. This really triggered me; it is so easy to become blind in this business. So I drastically lowered the amount of clicks to get to the point of purchase and gave more information about our terms in relation to online sales. Hopefully, it has now become more clear that we also run a webshop" (personal conversation, 2014).

Looking at the future of fashion stores, retailer T has only one thing to say: "It will all be about online and digitalisation, like, marketing wise. The paper era is blowing its last breath. [...] I mean, this is relevant to all retailers. In the end, you want to remain profitable. Paper advertising is a tradition of ours, but it is hard to tell conversion rates. If I buy 100,000 books to sell in my store, I do want to make sure that enough customers will buy them" (idem). He therefore pays a lot of attention to his website and SEO optimisation. Adding the right text, and the right links. "My goal is to appear in the top ranking in Google within one month. So if we have a new collection, I make sure that I announce it well, that everybody knows about it when searching for it. This is where the main part of the marketing budget goes to" (idem). Other retailers confirm this challenge: if people look for certain brands or fashion items, they want to make sure they are found quickly. But how to do that, remains a big task, especially when marketing budgets are limited.

INNOVATIONS ON ALL FRONTS

SERVICE INNOVATIONS

The service domain concerns the added value that a service or product provides for the customer. A great deal is expected of personalisation, in other words, the customising of the service or product for a particular individual so that a more or less unique service or product is created. The most literal interpretation of this is tailor-made clothes and the independent creation of, for example, a Louis Vuitton bespoke handbag from The Haute Maroquinerie in Bond Street in London. Personalisation is not just about creating a unique product or service; it also relates to finding an appropriate or unique product or service for an individual. Recommendations for you, the customer, based on your previous purchases or based on preferences of people with similar tastes can be found in many webshops. Another example is Buyosphere where you can obtain personal fashion advice from other visitors. Personalisation is also about customising the information about the service or product by taking into account the specific moment (morning rush hour, Wednesday afternoon, during Sunday opening hours, et cetera) and the precise location (in-store, en route, at home, et cetera). This personalisation can be improved by gathering as much information as possible about the customer: from buying trends via store cards and online click and buy patterns on PC, tablet, Smartphone and Smart-TV to personal information (zip code, e-mail address) and all kinds of sensor information (how you move around the store, what you look at, what products you pick up or take to the fitting room, et cetera). This combination of data can then be used to persuade the customer with targeted special offers or by adapting advertisements on TV, online, in magazines or on billboards in real time, as depicted in a scene in the film *Minority Report* released in 2002.

FASHION ADVICE @BUYOSPHERE

Buyosphere was a fashion advice community where one could browse style guides that were created by members of the community or simply ask advice on where to find something that is exactly what the consumer was looking for. Born out of personal frustration with finding unique products online, Buyosphere focused on finding that exclusive item that consumers couldn't seem to find using traditional methods. As Buyosphere said : "Our goal

is to create the best and most unique content through user curation – unearthing unique designers and products you won't find through a traditional search." With Buyosphere, shoppers could sign up for the Fashion Advice Community that enabled users to 1) ask questions to get help in finding that perfect item, 2) check style guides of other members and 3) save those items that customers love to their personal profile, thereby also having the ability to share these items with their personal network. Becoming an editor – an active member who is, for instance, able to create style guides that can function as an inspiration to others – was also one of the options Buyosphere offered. In this role, one could (as already mentioned) create style guides, be featured on the homepage and in newsletters and get a special profile where one could build a personal fashion magazine and style portfolio. The failure of Buyosphere proves that not all new interactive communities are a guarantee for success. After existing for two years, Buyosphere pulled the plug in 2014. As they said: "It was a million things that led to this not turning out the way we wanted it to."

Consumers do not wish to be identified when entering a store in order to be presented with a personal shopping experience

However, research shows that only 14% of consumers want a personalised offering, 42% do not and 44% are undecided (Peters & Witte, 2013). Of consumers, 77% also say that they do not wish to be identified when entering a store in order to be presented with a personal shopping experience. One possible explanation for this is fear amongst consumers about what happens with their data. Of those questioned, 67% were willing to share information with the retailer in order to be presented with relevant offerings but did not want their details to be shared with other parties. That makes it difficult to create an overall profile of a person and personalisation therefore remains restricted to a brand, store, social media platform, app or webshop despite the fact that benefits are to be had, including for the customer, by making information available to other suppliers about a person's preferences. Musical preference (iTunes downloads, Spotify playlists, radio listening pattern) is, for example, not an isolated feature of an individual but is related to all kinds of preferences. The North & Hargreaves (2007) study shows that musical preference is associated with choices of particular newspapers, radio stations, TV channels, TV programmes, magazines, books, the amount of time spent reading and the preference for certain leisure activities. In that sense music preference says something about a person's lifestyle. It is not unimaginable that a fashion webshop can recommend something relevant to a customer based on that customer's music preference.

A theme that is just as important as personalisation is the provision of *experiences*. Piet Zoomers said in an interview: "Those that want to survive in the future will have to pay a great deal of attention to the in-store experience, certainly if one wishes to take on online shopping." (in Hofste & Teeuw, 2012, p. 6). Veenstra (2012) regards 'experience' as an important weapon in combating inner-city property vacancy. Williams (2014) sees Disney's "Merchantainment' strategy as the next phase of e-commerce: the retail-store strategy of offering environments where consumers want to spend time - and money (p. 114). Ter Haar (2014) talks about the 'total retail experience'. And in the PwC trend report (2014) the (digitising of the) *shopper experience* is referred to as a megatrend: "A digital experience of products and services is achieved by creating a clear experience of his product and/or formula, in which online and offline are integrated. This digital experience is achieved by using and combining technological developments such as mobile devices, augmented reality, video wall holograms." (p. 12). What is striking is that new technology is often regarded as the bringer of good news: an experience is created 'automatically' through holograms, augmented reality, video walls, digital fitting rooms and virtual shopping.[6] Examples are the Burberry store with large screens and magic mirrors (that respond to RFID tags in clothing), interactive Coca Cola floors in shops and apps that allow you to shop 'socially' because you and your friends can all go shopping at the same time using social media (www.bevyup.com). Still, all too often experience is seen as a key to success without stating precisely what constitutes that experience.

The fact that there are other views about experience and shopping apart from the purely technological aspect can be found in the study undertaken by Erdman (2008). He tried to devise a number of design principles for adding experience to shopping areas so that their distinctive capacity would increase. He based this on, amongst other things, the well-known Pine & Gilmore theory on the Experience Economy (Pine & Gilmore, 1999). In that theory, Pine & Gilmore derive a number of design principles for creating experiences. In his study, Erdman examined the extent to which these could be used in the context of shopping areas and in so doing allowed himself to be guided by 12 experts. In the end, he devised four principles. Their strength is that he attempted to translate them into specific instructions:[7]

1. Achieve harmony, in other words harmonise all variables within a shopping area with each other. For example, appropriate for the environment, logical routing, correct size and scale in the shopping area, correct retail choice (sectoring, price, quality), quantity and quality of catering.
2. Avoid negative impressions that can affect the experience such as dirty and unsafe environments, poor accessibility, high parking charges, unoccupied property, wind nuisance, etcetera.
3. Activate the senses to create stimuli that feed the experience: light, smell, sounds, climate control, sight lines and visual aspects.
4. Create an identity by paying attention to recognisability (landmark, logo, promotion) and by creating a safe and pleasant atmosphere.

One final remark on experiences is necessary. In Van Vliet (2012) it is already stated, as a result of reviewing the Pine & Gilmore theory, that strong doubts can be raised about the unilinear process of economic evolution advocated by Pine & Gilmore, in which 'experiences' are a fourth step in the escape from the 'commodity trap'. The few historical examples that were referred to in Van Vliet's study (2012) as counter-example can now be supplemented further by examples

from the retail context. In the 1930s, Carl W. Dipman described a number of future visions on the development of food retail, in which recurring aspects are self-service and "shopping is to be an *experience*, not just a job to be done" (in Bowlby, 1997, p. 99). Furthermore: "In the late eighteenth century Oxford Street had already been described as a 'dazzling spectacle' of 'splendidly lit shop fronts' and 'alluring' and 'handsome' displays." (Nava, 1997, p. 64). Even more important than a vision and an illustrative example is that particular experiences were 'produced' and perceived around the turn of the 19th to the 20th century, the most iconic example of these being department stores. Department stores were more than just a place for doing your shopping; they formed a new public venue for displaying modernity and were visited as tourist attractions. The Selfridges department store was regarded, like Westminster Abbey and other places, as one of the biggest attractions in London. One of the Selfridges advertising slogans was: "Shopping at Selfridge's: A Pleasure - A Pastime - A Recreation". Department stores were 'fantasy palaces', luxuriously built from marble, iron ornaments, large open staircases, parquet flooring and silk and leather furniture. They were the first public places that used electric lighting, and not just for illuminating but also for the theatrical effects. Everything was configured for service and having fun whilst shopping, supported by unique spaces for children, restaurants, roof terraces, zoological gardens, ice-skating rinks, libraries, galleries, travel agencies, banks and all manner of services for delivering your purchases to your home. And that wasn't everything: "In their display of goods and use of colour, they often drew on the convention of theatre and exhibitions, continually innovating in order to produce new, vivid and seductive environments, with *mise-en-scenes* which combined, or offered in sequence, modernist, traditional and exotic decors (…) These magnificent stage sets also served as a backdrop to live entertainment, which was provided on a regular basis. There were live orchestras in the restaurants and tea rooms and even, occasionally, in the grocery departments. Dress shows and pageants were regular events. 'Spectacular oriental extravaganzas', which included live tableaux of Turkish harems, Cairo markets or Hindu temples, with live performers, dance, music and of course oriental products, were also held frequently." (Nava, 1997, pp. 66-67; also see Stobart, 2008).

TECHNOLOGICAL INNOVATIONS

The technology domain in the STOF model concerns the technology that is required to produce a new product or deliver a new service. A multitude of examples can be found in this domain, in which the development has already gone beyond QR codes, iPads, narrowcasting and information kiosks (Molenaar, 2011). Actual shop experiments are being undertaken with interactive full-length mirrors, from the 'simple' form where more information about the item of clothing is displayed on the basis of an RFID chip in the item of clothing (*magic mirror*) or where a picture is taken of the clothing that you are trying on and you have the possibility to share it via social media (*tweet mirror*), to gesture-based browsing through a collection where a selected item of clothing is projected on top of your image in the mirror and you can also move to see whether it 'fits' (*virtual mirror, Kinect-shopping*). There are plenty of examples of in-store touch-screens: from iPads to large video walls, which can be used by the staff or the consumer to search, select and order. Screens also appear increasingly in store windows (*interactive storefronts*), making it possible to search and order at the physical location of the store when it is closed. This is not necessarily linked to the store as such. Examples can also be found of self-service digital stores in public spaces such as airports (an example of which is Tesco at London Gatwick Airport) and in metro stations – the next generation of vending machines. Or the technology is in the clothing (tags) or on the clothes hangers – showing the number of 'likes' for the item on social media. Technology is not always visible to the customer, there is increasingly more in-store technology (sensors, cameras, WiFi-tracking, iBeacons) for monitoring customer patterns such as the route taken and items of clothing picked up, to cameras in mannequins that follow the eye movements of the customers.

USE THE TWEET MIRROR WHILE SHOPPING

At the 'Honeymoon shop' bridal shop in Rotterdam, they have an in-store Twitter Mirror. This smart mirror can take pictures that shoppers can email, tweet or post to whomever they want. With this new technology, it is perhaps a little less difficult for the brides to choose the dress of their dreams. The bridal shop's main goal is to help the customer to make a carefully considered choice about her wedding dress. One can use the Tweet Mirror by simply standing in front of it. You can use the virtual buttons on the screen to take and save pictures. This allows customers to see all of the dresses that they tried on and compare them with each other, without having to try them on again.

Technological innovations can also be found online. There are various examples of online *virtual mirrors* (*online fitting rooms*) as counterparts to in-store interactive full-length mirrors, where the image of the person filmed using a webcam is used for the virtual 'fitting' of all kinds of goods, from glasses, wigs, jewellery to make-up. Complete 3D shops can also be found online in which you can walk through the shop like 'in real life' and do your shopping. These can also be personalised so that you do not have to spend an endless amount of time looking for that one particular product. Because sizes are a significant bottleneck when ordering clothing online, online solutions for this have been developed that allow you to have a model of yourself produced and have that model try on the clothes (http://corpo.myvirtualmodel.com/index.html) or upload photographs of yourself and your sizes so that a 3D model of you can be produced, for example *Tesco's 3D fitting room*.

3D FITTING @TESCO

In 2012, Tesco launched a web-application that enabled consumers to create a 3D-photo-realistic model by entering body measurements and uploading two photos. Users of the Tesco feature were invited to upload a photo of their face to create the face of the virtual model. After some small adjustments, such as entering some identification points to calculate face measurements and adding a hairstyle, one could start creating the body by giving information about height, weight, and hip measurements (or by uploading a body photo). After the avatar was created, the consumer could start the shopping and fitting process. After the consumer created a model, (s)he could start adding clothes and see how the garments fitted. This meant that shoppers could 'try on' clothing while sitting at home behind their laptops, without having to pay a visit to the actual store.

With this feature, Tesco hoped to offer an extra service that would allow consumers to avoid long queues and try on clothing via their virtual avatar. However, looking at their website, www.clothingattesco.com, the application now seems to be removed and replaced by subjects that are more related to fashion advice and trends.

Finally, there are also technological innovations in the area of smartphones that are worth mentioning. Virtual reality has, for instance, become possible through the use of a certain app in combination with the Google Cardboard. We created an app like this, in which anyone with a smartphone and a Google Cardboard can virtually 'walk' through the byAmfi Statement Store in Amsterdam, wherever they are (Riester & Van Vliet, 2014). You can stand in six different places in and around the store and literally look around. A voice-over will guide you through the store at the pace you decide. Augmented reality via the smartphone is also used to boost the consumer experience and to provide additional information about a product. The latter is a common use of the smartphone: whether it is by scanning QR codes, via Bluetooth (beacons) or RFID, the smartphone is a commonly used device for providing consumers with personalised extra information or for informing them about special offers. This additional information is often combined with information about the consumer's location (*location based services*). For example, a few years ago Wehkamp was able to launch a campaign that gave consumers a 10% extra discount on Wehkamp products if the consumer was in a competitor's physical store, for example in the Mediamarkt, at that moment (Hofste & Teeuw, 2012). Another example is the Shopkick app (www.shopkick.com), which rewards you every time for simply walking into a particular store (the 'kick'). If you do this often enough, you will receive in-store discounts.

AUGMENTED REALITY ADVERTISEMENTS

Do you want to show multiple products in one advertisement, but don't have the space to do so? Or do you want to offer a new experience for consumers while browsing through advertisements? Augmented reality advertising does just that. Augmented reality ads can offer a new product experience. According to Layar (www.layar.com/why-layar/) consumers are 165% (!) more likely to buy a product when it includes an AR marketing component. The type of AR ad that we are talking about here is an ad as we know it: a picture in, for example, a magazine. Only with AR, consumers can point the camera of their phone at the ad. The camera then searches for 'recognition marks' to identify the object in the picture. As it does this, it shows the content that is linked to the information on the phone's screen, such as a shoe collection, or the possibility to see a dress in multiple colours, as a layer over the actual photo. Most of the time one needs an app that enables the possibility to recognise the products. From this perspective, the process is the same as with a regular QR-scanner: scan the item and then extra information will appear. The extra information in the case of AR-technology contains a 'pop-up'. One can suddenly see a 3D version of a product, or one can pick different colours for a certain outfit.

The level of prominence of smartphone usage in the consumer's current buying process is apparent from, among others, the DigitasLBi study (2014). Around two-thirds of Dutch consumers stated that using a mobile phone has had a significant impact on the buying process. For example, 90% of consumers use their mobile phone to search for more information about a product when they are at home, at work or school, and around 40% do this when they are in the store. So as a retailer it is worth considering how to create a valuable experience for your customers with smartphones. The mobile phone is used in the store to search for information, to compare prices and to ask the opinion of friends and family about the products. The Snaptell app, for example, allows you to take a photograph of a book, CD or videogame and then shows reviews and ratings for the product. Purchases made by mobile phone are lagging behind somewhat; when asked if they had purchased a product via their smartphone in te last three months, only 18% of Dutch consumers said yes (DigitasLBi, 2014).

As a retailer it is worth considering how to create a valuable experience for your customers with smartphones

We can see comparable results in the Kilcourse & Rowen study (2014): one-third of customers use their mobile phone in the store and do so mainly for price comparison (62%) followed by product ratings and reviews (45%) and improved online choice (39%). Williams (2014) writes about more than half of the consumers using a mobile device in the store, primarily for comparing prices. Of those consumers, 36% visit the retailer's website or app for the store in which they are located at that moment. A Google study (Google, 2013) also reveals the advance of the smartphone in the shopping process: 90% of the smartphone users asked said that they use the smartphone before shopping (finding store locations, opening times, price comparison, special offers, browsing catalogue) and 84% use the smartphone in the store; for clothing this is 80%. The most important activity on the smartphone in the store is price comparison, although this is more prevalent for appliances and electronics (>70%) than for clothing (44%). Search engines are mainly used for this and, in second place, the store's website. The study also finds that consumers who use smartphones frequently in the buying process spend 25% more money compared to consumers who only use smartphones for this purpose occasionally.[8] The researchers regard the smartphone as "one of the biggest influencers in the store today; it presents tremendous opportunities" (Google, 2013, p. 15).

At the same time, not all retailers and advertisers are 'up to speed' with these developments. Only one-fifth of retailers consider contextualisation of information for a consumer to be important (Kilcourse & Rowen, 2014) and only one-third of advertisers use mobile marketing – mainly for boosting sales and greater brand and customer engagement; amongst advertisers with a loyalty programme the mobile phone plays no role in two thirds of the cases (Velti, 2013). It is expected that attention to and budget for mobile marketing will increase substantially in the coming years (Shankar et al., 2010; Williams, 2014), especially for *location-based services* and *couponing* (Velti, 2013). The latter can, for example, be via an 'opt-in' procedure where the customer can decide whether or not to receive coupons. These expectations are not only based on

the increasing use of smartphones, but also on the fact that the smartphone is experienced as being personal and the retailer has the possibility to 'follow' the consumer everywhere: "Retailers can now enter the consumer's environment through the mobile device, and, because the mobile device stays with the consumer, the retailer can be anywhere, anytime" (Shankar et al., 2010, p. 112). There is, however, a shift taking place in the belief that mobile devices not only have to have a function for attracting the consumers to the store but that they also have to be seen as a channel that must support the entire sales process, including in the store: "Mobile's role is to bind the digital and physical selling environments together in a meaningful way for consumers." (Kilcourse & Rowen, 2014, p. 22). The main reasons why retailers and advertisers are lagging behind are budget and knowledge as well as mistrust on the part of consumers about (push) marketing (Shankar et al., 2010; Velti, 2013; Kilcourse & Rowen, 2014).

In our study, conducted by students, into the use of technology in 60 fashion retail stores in Amsterdam, we also found little evidence of all of the technological possibilities (Schrandt, Riester & Van Vliet, 2014). The stores rarely use any of the current digital opportunities. Products are mainly promoted using flyers, bags and posters. Feedback from customers is mainly obtained via forms. Interactive screens are the most common form of digital expression although here too only one-third of the shops studied made use of this. Visitors are being asked to visit the website/webshop (for example by printing the URL on the till receipt). The websites/webshops of the shops studied often contain the same information that people would encounter in the store. Cautious use is being made of technologies such as 3D visualisations, but this is somewhat limited. The most important technologies being used are search functions and viewing catalogues using zoom functions for photographs. In some cases (one-third) it is also possible to leave feedback and view other reviews, but that too is only on a limited scale. As regards mobile phones, one-third of the shops have an Android app and almost half have an iPhone app. However, you are hardly ever asked to install the app in the store or on the website. This small-scale study therefore seems to confirm the statement: "There is a vast distance between retailers' understanding of the value of many of today's technical solutions and actual use - even though many of those technologies have been available for quite some time" (Kilcourse & Rowen, 2014, p. ii). Almost a year later we conducted the same study again (Moes & Van Vliet, 2014) to see if there were any differences. In the course of almost a year not much has changed, but there were a few differences. The amount of stores that offered a loyalty program increased from 49% to 57%, more stores ask customers in store to use a certain Twitter hashtag (increase of 3% to 9%) and to visit their website (40% to 51%). Some things have also changed online. In webshops, customers are more frequently asked to use their mobile phone to complete a certain task (4% to 15%) and it is now even more common to give customers a full refund for returned goods ordered online than it already was (increase from 90% to 98%).

ORGANISATIONAL INNOVATIONS

The organisation domain in the STOF model concerns innovations in collaboration with other parties in the value chain and the organisation of the processes for delivering the service to the customer. An innovation that has been ongoing for somewhat longer in the value chain is what is known as 'fast fashion'. For many fashion retailers, the process commences with the supplier and designer who design a new collection a year beforehand. New collections are, for example, launched twice per year in the store, after which the consumer buys the clothing. With 'fast fashion' the starting point is the buying pattern of the consumers, which is monitored closely: what is popular, what is the big seller, et cetera. The store manager then places orders with designers on the basis of this information. The logistics process is configured in such a way that the new collection is on display in the store within two weeks. This involves higher logistics and production costs, but, on the other hand, only products are sold for which there is a demand, so they can be sold at full price, and little of the collection ends up in the sales. Examples of stores that use this process are Zara (Inditex), Peacocks and Forever21. This so-called chain reversal is seen as an important future strategy for physical stores (Molenaar, 2011).

Another innovation for which various examples can be given is online collaboration. For small, independent retailers it is difficult to compete online against the large platforms due to the costs and the knowhow required and also because it is difficult to attract sufficient consumers to a relatively unknown website or webshop. An increasing number of major players such as Amazon and Bol.com give small shops the possibility to use their platform. The benefit for such a platform is that their product range increases even further, and their position as a *one-stop-shop* is strengthened. For the small retailers, they not only benefit from all kinds of webshop logistics processes (order fulfilment, secure payments) but the penetration to potential customers is increased many times compared to them having just their own webshop. In the fashion industry, the Scandinavian firm Miinto is a good example of this. This platform provides independent fashion retailers with their online webshop, which is part of the general catalogue of the platform. The fashion retailers can also 'buy in' other services from Miinto such as collection photography and transaction handling. Other examples are etsy.com, jeansonline.nl and topshoe.nl. The collaboration does not need to be exclusively based on product category (jeans, shoes) but can also, for example, be based on location – an example of which is the 9straatjes in Amsterdam (9straatjesonline.com).

SELL ON MIINTO

The formerly Scandinavian company Miinto is a perfect example of how to achieve online success. Miinto offers independent fashion retailers a platform for them to spread their online wings. Boutiques not only get their own online spot and are listed in the general catalogue of the platform, they can, for instance, also outsource the photography of their collections and the payment transactions to Miinto. Individual stores suddenly become e-tailers that can now profit from the power of online commerce. Boutiques can easily sign up by contacting Miinto. They will then check whether the boutique meets the conditions they think apply to their company. After a boutique is signed up, it can use Miinto's resources to sell products online and even use their photo studio. Many small players are becoming a large force in the online market. Miinto is now the largest fashion store in Denmark and is currently expanding worldwide.

However, the majority of the innovations encountered in the organisational domain concern logistics. For example, the smart integration of stock systems so that it is possible to see whether and where a product is still available in the store or online. There are also so-called *stockless stores* where customers can see the complete stock or collection in a physical store using iPads or large video walls, place their orders and have the products delivered to their homes. At most, there are some demo products available in the store. An example of this is the Scottish retailer House of Fraser. The vast majority of the examples are, however, about delivery of products to customers. In fashion, delivery is one of the most important aspects of consumer satisfaction (Peters & Witte, 2013). Customer satisfaction is not only an important criterion for paying a lot of attention to delivery; the costs are also important. In 2012, a quarter of the 88 million online orders resulted in a return. For fashion this was as high as 60%, while for electronics it was only 5% (PwC, 2013). Returns and the logistics surrounding them cost a lot of money. As long as it remains difficult to implement suitable sizing online and to properly convey the colour and texture properties returns will, for the time being, continue to be an important aspect of the service and the costs.

Research shows that ability to choose a fixed delivery time is the most important

Although several criteria play a role in delivery, such as speed, convenience, costs and reliability, for the consumer it appears that the ability to remain in control is important. Research shows that the ability to choose a fixed delivery time is the most important aspect (31%), followed by pick-up points from a local store (24%), next-day delivery (24%) and same-day delivery (8%) (PwC, 2013). Schut et al. (2014) also found that being able to determine the time of delivery is an important criterion for the customer (90%), while this is only offered in 12% of the cases. Free returns are also a wish that emerged, with around 60% of consumers stating that this is important. In reality, only 15% of deliveries can be returned free of charge. A further important aspect of returns is: quick and clear instructions about the return process and money credited to the customer's account.

All kinds of innovative logistics solutions are now being used, from ordering online and in-store collection and/or returns (*Click & Collect* concepts) to online reservation of an item of clothing in a particular store (Hunkemöller's *Check & Reserve*) and the delivery of ordered products to specific pick-up points, for which experiments are already being conducted with fitting rooms at pick-up points so that pick-up and returns can be combined (see www.deburen.nl). These can be staffed pick-up points (filling stations, schools, libraries, stores) or unstaffed pick-up points (safe-deposit boxes). In the Netherlands, there are already around 6000 pick-up points (Schut et al., 2014). The ideal solution is not easy to find, so a customised solution sounds logical. However, there are many variables that have to be taken into account which, in any event, include the type of product (size, non-food/fresh/frozen, requirement for personal contact for signing or installation, for example) and the type of customer. One customer will prefer speed, another convenience or price. Harmonisation between product, customer and process does not only require good operational implementation, but also strategic choices about how to deal with deliveries (see Schut et al., 2014).

BIJENKORF: BUY ONLINE, COLLECT OFFLINE

The effort and the costs that both companies and customers undertake to get a package delivered at one's house, often leads to a real challenge. Therefore, a logistic innovation that is becoming increasingly popular is ordering online and collecting the items in the store. On the one hand it offers consumers the option to pick up their items whenever it suits them best. On the other hand it saves the retailer, in this case Bijenkorf, a lot of time trying to get the package delivered to the right address.

Bijenkorf's main goal with this 'buy online, collect offline-principle' is to offer a better service to their customers. The benefit for consumers is that they don't have to be at home during specific hours, just waiting for their order to arrive. They could also try the garments in the store and return the items if not wanted. Retailers don't have to stop at the house multiple times per week to see if the customer is at home. Additionally, they have an extra point of contact with the consumer.

The buying process is very simple. First, the customer orders items online. There is no minimum amount to be spent. If customers order before 9 pm, they can pick up their items the day after at the service desk of the Bijenkorf. Customers receive an e-mail stating that their order is ready for pick-up. Of course, some ID is required, such as a driver's license. Items will be reserved for 14 days. If not picked up, they will be sent back to the warehouse.

FINANCIAL INNOVATIONS

The financial domain concerns the way in which incomes are generated from a specific service or product, and the way in which risks, investments and revenues are shared between the different actors in the network. An example of this is innovations in pricing. Price comparison websites (kieskeurig.nl; preisroboter.de) provide insight into the prices of different providers and lead to price adjustments on a daily basis in order to be able to sell at 'lowest prices'. Prices are adjusted dynamically on the basis of demand, competitors and seasonal fluctuations and data about other variables in which patterns are discovered that determine the sale of products (for example, see Daphne Stores: http://vimeo.com/45975732). Alternatively, 'exclusive' clubs are formed in which members can buy clothing at a substantially reduced price (www.vente-exclusive.com, fashiondeal.nl, Brandinvites.nl). Loyalty programmes (customer cards) and also coupons are making a return with providers such as Groupon, Sweetdeal and Friendstix, where substantial price reductions can be achieved by means of temporary and local special offers. A considerable amount of innovations concern payment methods, which are often managed by technological development and are focussed on customer convenience. A collaboration between Samsung and Paypal means that Paypal is pre-installed on the Gear2 Watch. A development like Near Field Communication (NFC) incorporated in, amongst other things, bank cards or mobile phones makes it possible to make payments easily and quickly. Contactless

payment systems are, like the name already suggest, systems whereby customers can pay for their goods without having to insert their card into a payment terminal. Signatures and PIN codes are also no longer a necessity. Just keep your card (or even mobile phone) close to the machine in order to pay. The embedded chip and antenna enable consumers to swipe their card over a reader at the point of sale. In the Netherlands you can pay amounts up to 25 euro in this manner. If you have to pay a higher amount, you still have to insert your PIN code.

POWATAG

PowaTag is a new payment enabling technology that claims to seamlessly integrate the physical and online experience, thereby transforming the future of shopping. Powa Technologies introduced an app that enables consumers to purchase items directly via their smartphone while scanning items that they are interested in. With this app, consumers can purchase items from sources such as visual media, articles, announcements on events or radio- and television commercials. PowaTag combines mobile commerce with bluetooth geolocation technology, which makes it possible to buy items impulsively. Impulse buying is facilitated in this way. By scanning the item, which must be available in PowaTag's database of course, the product is recognised and can then be purchased by the user. Giving personal information, such as your name and billing information (just like one would do at a regular webshop), enables the customer to buy the item. Additionally, (physical) retailers can send special offers to consumers that are near to a site equipped with PowaTag bluetooth beacons. And as you can already guess, PowaTag also tracks what consumers actually do and purchase with the app.

Transactions do not always need to involve money or alternative currencies (Bitcoins). The campaign team responsible for Kellogg's cereal brand Special K created an experiment in 2013 where consumers could pay by simply posting something while using the hashtag #SpecialKPO. Kellogg's goal was to find new ways to interact with consumers and thereby also get the opportunity to collect consumer data. Additionally, as Nick Scotcher, marketing manager of snacks at Kellogg, mentioned: "We wanted to give people something in return for the things they already do naturally on social media."[9] The something that consumers got in return was a sample of Special K Cracker Crips, not the real full product.

A more serious development is that of consumer-to-consumer transactions. On the one hand this concerns marketplaces where consumers can trade between each other, with the most well-known examples being eBay.com and marktplaats.nl. This has expanded into all kinds of products and services, such as travel (airbnb.com), hiring a car from someone local (snappcar.com), selling homemade products (etsy.com) and peer-to-peer lending without the intervention of a bank (prosper.com). On the other hand, it is also about borrowing and exchanging, as is the case on peerby.com, where you can borrow things from local people, or thuisafgehaald.nl where you share meals with your neighbours. This so-called 'C2C-market' has grown enormously in recent years. However, there are calls for some scepticism about all of the enthusiastic stories and the sharing economy. For example, SnappCar's alleged success is open to question (Wijnen, 2014). Sharing personal goods (car, telephone, clothing) is indeed something completely different to sharing digital goods or your tastes (Spotify, LibraryThing). It is expected that 'sharing' will play a less significant role in fashion because consumers say they are less willing to share clothes (Shopping2020, 2014a).[10]

INSIGHTS AND CHALLENGES AMSTERDAM FASHION RETAILERS: SOCIAL MEDIA

Almost all interviewed fashion retailers say that social media are an important communication channel for their business. Reasons to use these channels differ at a variety of levels. First, there is the practical level. As accounts on Facebook, Pinterest and Twitter are free of charge, it obviously cannot hurt to try. Online presence is guaranteed. This applies to almost all fashion retailers and is often used to present the collection visually. Here, social media are used as a channel to present the collection and activities. Then, there is the second, somewhat more strategic argument. Online activities on for example Facebook and Instagram are visible to retailers, which enable them to monitor responses, views, likes and so on, and act directly on this information. Here, social media are used to monitor how online readers react to and interact with (potential) customers. The third and last argument is a clear strategic argument that shows that digital is part of the organisation's heart. Social media are part of a multi-channel strategy and the retailer wants to be relevant to its target group by presenting different promotional campaigns to different target groups. "Digital media are not only cheaper, but you can also target them a lot better and hence calculate the ROI more easily" (Anonymous retailer H, 2014). Sometimes collections are also sold via other webshops (such as Zalando, Wehkamp) in order to ensure that retailers do not miss the opportunity to make contact with a (potential) customer. Because, as one retailer puts it: "Customers choose the channel where they are at that specific moment. As a company, you have to follow your customers, you have to be where they are" (idem).

Social media also involve challenges for the retailers. The retailers all mention that they use social media especially because they are free, but they do find it hard to use them in a positive manner. How does one deal with complaints? Or what to do with fake accounts, promising discounts and free gifts that are not available? What to do with the comments and data that it produces? When do you know when you are doing well? Does 10,000 likes represent good positioning? A lot of questions arise about how to deal with the (potential) customer, how to create a good dialogue, how to use the data that companies receive and what kind of actions should be related to it. What percentage of those 10,000 likes will actually buy something of your brand? Recommend your brand? Or discourage others to buy something of your brand? The interviewed retailers are whistling in the dark.

THE SHOPPER

THE CONSUMER & THE SHOPPER

All of the innovations that have been mentioned are ultimately aimed at adding value for the consumer. However, not all consumers are the same. A party game that is just as entertaining as predicting technological developments is characterising consumers. This is not the exclusive domain of the retail sector. Museum and archive visitor types have been introduced such as sniffers, grazers, excavators, snackers, educators, nomads, butterflies and grasshoppers (Van Vliet, 2009). The shopping public has to tolerate less poetic designations and more Tarantino-like names such as 'the keeper', 'the banker', 'the hunter' and 'the courier' (Sansolo, 2012). Characterising the consumer or the shopper – the person who makes the actual purchase – has a history going back around 60 years. In Stone's first typology, devised in 1954, the characterisations of the economic shopper (oriented towards for price and quality) and the apathetic shopper (shopping is a necessity and a chore) had already appeared (Westbrook & Black, 1985). The importance of a shopper typology is that it gives the retailer the possibility to make better decisions about products offered and special offers (Westbrook & Black, 1985).

A frequently recurring contrast in the characterisation of shoppers is that of 'doing the shopping' versus 'going shopping', which is the difference between: "Shopping *for* and the recreational shopping *around*; the latter being an autonomous realm of experience and action in which the economic (instrumental) aspect has been marginalized." (Falk & Campbell, 1997, p. 6). This concerns the distinction between instrumental (doing the shopping) and recreational (going shopping) (Westbrook & Black, 1985; Hewer & Campbell, 1997; Molenaar, 2011): "Going shopping is a vague activity, an *extravagance* - literally, 'wandering out'. It is open-ended, with no precise plans or destinations: you can spend all day or not, you may just look and not buy. Going shopping is pleasurable, and possibly transgressive and excessive: you may spend too much time or too much money. Doing the shopping, on the other hand, suggests an obligation or a regular routine. It implies something both planned and limited: the definite article, with no extras or deviations. Going shopping points to fashion, clothes and leisure; doing the shopping is food shopping, for the most part regarded as a chore. Food is necessary, fashion is fun and spontaneous." (Bowlby, 1997, p. 102).

Lehtonen & Mäenpää (1997) described these two types of shoppers in more detail by contrasting them with each other (see Table 2). This distinction does not say that both forms cannot occur simultaneously: instrumental aims can play a role when going shopping, and when doing the shopping we can also amuse ourselves (Falk & Campbell, 1997). Incidentally, shopping for pleasure is not something that has only occurred recently due to the increase in affluence, it is already referred to in the classic figure of the *flâneur/flâneuse* and has a longer history than one often assumes (Stobart, 2008).

Shopping as a pleasurable social activity	Shopping as a necessary maintenance activity
Spending of time	Scarcity of time
An end in itself	A means
Does not necessarily imply making purchases	Always implies making purchases
Impulsiveness	Planning
Dreaminess and self-illusory hedonism	Realistic satisfaction of needs
Effectiveness unimportant	As effective as possible
Pleasure	Necessity
Outside the routine of everyday	An everyday routine amongst others
Emphasis on experience	Emphasis on rationality
Playfulness	Seriousness

Table 2: Two types of shoppers (Lehtonen & Mäenpää, 1997, p. 144)

More than two decades later we continue to see the same characterisations in a Shopping2020/GfK publication (GfK, 2013). For example, this report makes a distinction between the shopper who regards shopping as a necessity and the shopper who regards shopping as a pleasurable activity. The study also raises an aspect that Lehtonen & Mäenpää (1997) used in their characterisation of these two types of shoppers and introduces it as a separate dimension: planned/prepared versus unplanned/spontaneous. The intersection of these two opposites or axes produces a profile of four types of shoppers (Figure 2):

1. The calculating shopper: 'shopping is like work'. This type of shopper includes men and women, and all age groups are represented in it, though the 40-64 age group is more prevalent. Average income is lower than average, as is the academic level. This shopper lives in a family with children more often than the average. Purchases are planned. The preference is for own brands, and they are not sensitive to fashion or new trends. They believe that accessibility and parking facilities are important and do not find small specialist business to be particularly important. Price is the general motive for product selection. This shopper shops in well-known retail chains and well-known webshops. Online, prices are mainly compared because it is easy to do so, and a quality mark is important,

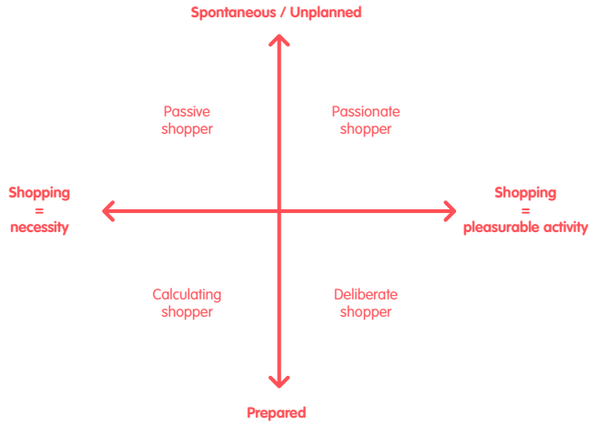


Figure 2: Four types of shoppers (GfK, 2013)

as is the ease of return. With regard to reviews, those of acquaintances are preferred. In the future, this shopper will buy more online because of the decline in local retail. Typical stores that are visited are V&D, Wehkamp, Hornbach, C&A, Bonprix, Scapino and kieskeurig.nl.

2. The deliberate shopper: 'shopping is like sport'. This type of shopper also includes just as many men as women. All ages are represented, but the average age is lower than in the other groups. Income is above average and academic level is relatively high. This shopper sets out well prepared, orientates himself/herself using the Internet, chooses quality, is brand-sensitive, specialists stores are preferred and he/she likes to talk to experts in order to confirm their research. Online is easy to fit in with the hectic lifestyle and is used for comparing products and gathering more information. In the store, they seek the touch and feel and personal advice. Accessibility and an extensive range are important. Greater value is placed on experts than on their own social circle. In the future, online will be used even more for preparing for the offline visit. Typical stores visited are Duthler, We, de Bijenkorf, Cool Blue, Tommy Hilfiger and Wehkamp.nl.
3. The passive shopper: 'shopping is like a visit to the dentist'. This type of shopper is more often a man than a woman. All ages are represented, but the average age is higher than in the other groups. Income is average and academic level is relatively low. This shopper only goes shopping when it is absolutely necessary – at well-known retail chains in shopping centres or at local retailers where there is ample opportunity for parking. This shopper is sensitive to store staff recommendations or those made by acquaintances. Online is especially easy and well organised but the personal attention is lacking. This shopper goes for shopping convenience and minimum risk and mainly wants a simple buying process. Because of the decline in local retail this shopper will shop more online in the future, with a few well-known retailers that provide good service. Typical stores that are visited are C&A, Hubo, TerStal and Hema.

4. The passionate shopper: 'shopping is a hobby'. This type of shopper will more often be a woman than a man. All ages are represented, but the younger age categories are more strongly represented within this group. Income is lower on average, and academic level is average. Shopping is a pleasurable activity, can be done anywhere, is a social experience and is relaxing. This shopper likes to be tempted and is driven by brand image as well as price and quality. Prefers to shop where there are a lot of stores at one location, with major brands and retail chains present. Shops mainly have to provide atmosphere and inspiration. Shops online and offline, and likes a wide choice. Online mainly means reduced experience, time between purchase and delivery and a fuss about delivery and returns. Opinions of family/friends are important, also via social media. Typical stores that are visited are Zara, Action, Zalando, Primark, H&M and Vero Moda.

ALTERNATIVE VIEWS ON THE SHOPPER

The descriptions of the different shoppers remain an eclectic mishmash of psycho-demographic characteristics. There are at least two distinct alternative views that can provide a sharper picture of the different types of shoppers. The first alternative is to look at the underlying motives. A study like the one by Westbrook & Black (1985) shows that a focus on underlying motivations reveals a more differentiated picture of the 'recreational', 'economic' and 'apathetic' shopper than is often depicted. However, there is little agreement about the underlying motivations of shoppers (also see Lesser & Kamal, 1991). Performing a meta-analysis of the studies already conducted, comparable with the meta-analysis of studies on the motivations of visitors to festivals (Van Vliet, 2012) seems to be a logical step forward in this discussion.

A second alternative is to look at 'consuming practices', in other words the characterisations of shopping patterns: 'What do people do when they consume?'. Those patterns do vary considerably between people and situations such that it would be inadequate to explain them exclusively on the basis of the (economic) benefit and the (symbolic) significance of the object that is being consumed (Holt, 1995), or on the basis of fixed types of shoppers (GfK, 2013). According to Holt (1995), consumption has to be regarded as a form of social act where people use consumption objects in different ways. He concludes that there are four classifications of such practices based on two axes: the structure of consuming (focused on the object or focused on the interpersonal) and the purpose of consuming (a purpose in itself, in other words, 'autotelic' or instrumental for another purpose). This leads to four types of metaphors for describing the practices, which in Holt's study is explained by means of the 'consumption' of a baseball game (Figure 3):

1. 'Consuming as experience': the subjective emotional reactions to consumption objects. This means the ability to interpret the object: what it is, how it works, what conventions are applicable, et cetera (understanding the 'world of baseball'), the evaluation of the object against standards, expectations, previous experiences (for example, on the basis of baseball statistics), and the emotional appreciation of those (ecstasy when there's a home run or admiration for the elegance of a throw).
2. 'Consuming as integration': mastering and manipulating the (symbolic) significance of the consumption object in relation to your identity. This means: acquiring knowledge about the object so that one becomes competent or by wearing visible references to the object (logos, paraphernalia), trying to become part of the object or its makers (becoming a fan) and the personalising of the object by linking personal objects to it (attire during games).
3. 'Consuming as classification': the buying, possessing and displaying of consumption objects in order to identify with a group and thus achieve affiliations and distinction: "shopping as a performance becomes important in shaping status and identity." (Stobart, 2008, p. 14). Whilst this is easy (to show) for material goods, for 'services' it is indirect – for example, through photographs and souvenirs that prove you were there or by demonstrating expertise (telling stories, being aware of conventions).
4. 'Consuming as play': using consumption objects as a play element in social intercourse. On the one hand, this concerns the use of consumption objects for exchanging shared experiences (telling tall stories). On the other hand, it means using the consumption objects to entertain each other (imitating commentators for example).

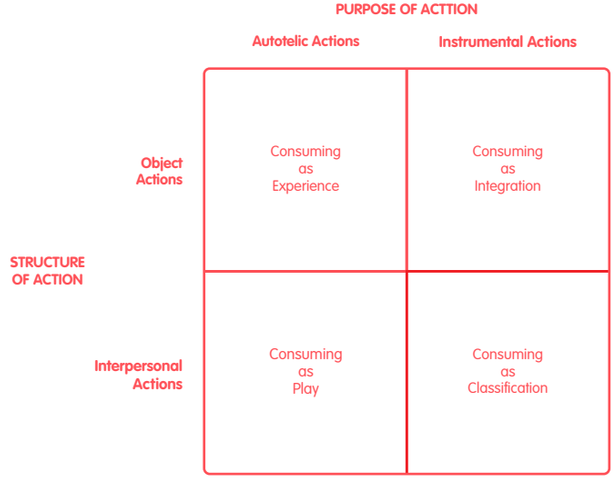


Figure 3: Consuming practices (Holt, 1995)

These 'consuming practices' occur in variable relationships: "One important implication is that consuming is never just an experience, a disinterested end in itself. Consumer actions directed toward consumption objects have many faces: they are lived experiences that enlighten, bore, entertain, or raise our ire, but they are also means that we use to draw ourselves closer to valued objects and resources that we use to engage others - to impress, to befriend, or simply to play." (Holt, 1995, p. 15). That varying relationship is not just down to the fact that the different practices can play a role simultaneously, but that they can also occur consecutively. Consuming is a process in which practices can vary.

To view consuming as a process raises the question of possible steps or stages. In the characterisation of this process as a 'customer journey' or 'shopping journey', there are three stages that are always mentioned: orientation, selection and decision/transaction (Hofste & Teeuw, 2012). A more detailed classification from the perspective of the consumer has six stages: *awareness* (the recognition that there is a need), *collect* (collecting information about products and suppliers), *evaluate alternatives* (evaluating the various alternatives), *decide* (the actual decision to buy), *use* (the use of the product) and *evaluate* (the evaluation of the product and the buying process).[11] All kinds of developments have influenced all of these stages in recent years: from search engines (*collect*) and comparison websites (*evaluate alternatives*) to talking on social media about purchases (*evaluate*).

Discriminating different stages in the consuming process, possibly comes across as a compulsory, linear and rational process

Discriminating different stages in the consuming process, possibly comes across as a compulsory, linear and rational process. Of course, enough examples can be found where the customer journey is not linear and the shopper does not always act purposefully: "there is a tendency to present the shopper as both an information-processor, a problem-solver and a rational maximiser of utility. The limitations of such a model have long been known. Apart from the a priori nature of the assumptions that they contain, such perspectives ignore all the evidence that shows (…) that problem-solving behaviour is a relatively rare occurrence, and that habitual behaviour is a far more common feature of consumer behaviour." (Hewer & Campbell, 1997, p. 188). However, this does not detract at all from the conceptualising for recognising different phases - we just have to take into account a much more dynamic process. Furthermore, the fact that all kinds of unconscious processes that can be manipulated play a role in the customer journey does not mean that the consumer has become entirely 'irrational' (Maas, 2013). That would be throwing the baby out with the bathwater.

From a retailer's perspective two further stages are often added to the previously mentioned three stages: *delivery* and relationship management/after-sales (*customer care*) (Schut et al., 2014). Although this appears to be a logical addition it is necessary to realise that we are dealing with two processes: a consumer process and a supplier/retailer process, which are not organised in the same way. The consumer is, of course, also involved in a delivery, but clicking a button on a website to have the package delivered to a local branch is somewhat different to the fulfilment of this order. From a retailer's perspective, marketing is more likely to look like the following: 'create demand, identify where product could be purchased, expose and engage the shopper, capture transaction data, apply lessons learned to the next marketing action' (Blatt, 2012). The two perspectives or processes are difficult to understand in one 'journey', just like some concepts are reasoned more from the customer perspective (omni-channel) and others more from the retailer perspective (cross-media) (see Van Vliet, 2014). The fact that the customer process and the retailer process 'touch' is obvious, and has recently been expressed in the increasingly popular term 'touchpoints' (Shopping2020, 2014b). However, a clear definition of the term touchpoints is lacking: theoretical embedding, conceptual definition and operationalization are still rarely encountered. Furthermore, the question arises about where touchpoints differ from the 'old' term of 'service encounter' as 'a period of time during which a consumer directly interacts with a service' (Clarke & Schmidt, 1995).

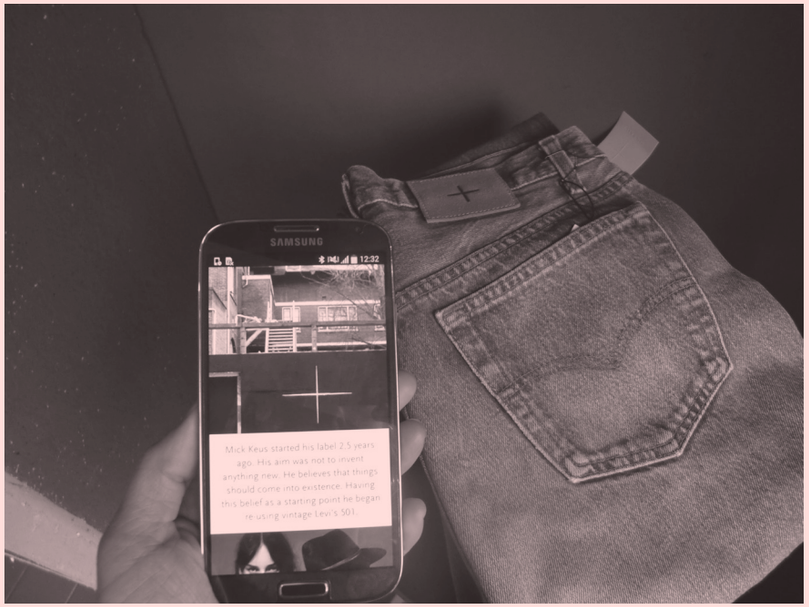
INSIGHTS AND CHALLENGES AMSTERDAM FASHION RETAILERS: PERSONALISATION

A major issue that is mentioned during the interviews is the notion of personalisation, in many different forms and expressions. Fashion retailers clearly mention the importance of 'personal' contact with customers, whether physically or digitally. It seems that boutiques tend to have a preference for personal contact in its physical form, partly because they state that this is one of their brand values, which reinforces their business proposition. Physical personalisation exists in the form of personal advice, VIP treatments and exclusive loyal customer events in the store. Digital personalisation is often related to differentiation in promotions, which can be accomplished by membership cards or insights into the buying history of customers. Some retailers mention using more innovative technologies to do this, such as interactive mirrors, but also explain that this is not something that is appropriate for their budget. They are, however, interested in it, and some of them follow developments very closely.

An important shift was therefore noticeable in recent years: it is less about branding and push-strategies, and more about listening to your customer and what a brand and its products can do for them. "It's important to build a relationship with the customer and that they become a fan of your brand. Then they become ambassadors of your brand when they are sharing their experiences about you on their Facebook page" (Anonymous retailer H, 2014). Retailers believe that honesty and emphasizing how the brand can cater to customers' needs, will be important values in the upcoming years.

There are also a couple of challenges involved with regard to personalisation. There is the discussion on privacy issues and regulations that might obstruct obtaining data that could really add value to one's personalised offering (see section 'Shopping in 2020'). Besides that, if fashion retailers really want to offer personalised promotions, the retailers would have to be able to follow the customers in all channels: "Sometimes customers come into my store and tell me: I really like this jacket. But if I order this online, I can get it for 15 Euros less. What can you do about that?" A true story, told by a retailer in Zeeuws-Vlaanderen (Bomont). Customers are increasingly aware of the possibilities that they have online – and offline – and apparently feel free to start negotiating about in-store prices. Although interviewed retailers in Amsterdam did not share these experiences, they do confirm the difficulties around online pricing and how to survive in such a fickle environment. Some retailers mention that their added value is therefore to offer that extra service, such as free clothing alteration or special events.

Switching channels and brands has become really easy for customers, as it is literally just one click away. But the main issue with the changes in channels might not be that shops have the feeling that they are losing customers to online channels, but the fact that they are not able to track them. Merging on and offline channels is high on the priority list of the interviewed Amsterdam retailers. Not just to create rich profiles and learn more about the behaviour of customers and alter your strategy appropriately, but also to advise customers better: "When a customer comes in the physical store and is already logged in on the app as a member, then we are able to see her buying history and our staff can do a suggestion what she might also find interesting. [..] And if a customer is searching for a panty on the mobile website and later on a desktop, I would like to be able to recognise them and respond to it by offering them a discount. That is the ultimate goal in a multi-channel strategy" (Anonymous retailer H, 2014). Additionally, stores would have a better insight into whether customers actually just leave the store and buy an item elsewhere, or leave the store and buy *your* product online. Merging channels therefore not only relates to better and personal offerings for customers, but also greater ability to divide sales targets into off and online channels. This will, no doubt, remain an issue in the upcoming years, as it is very hard to track the same customers both physically and digitally, especially when they do not possess a membership card.



CROSS-MEDIA AND RETAIL

CHANNELS, CHANNELS AND MORE CHANNELS

The question about the effect of (technological) developments in the near future and the question about who will make use of them, why and in which way, are necessary but relatively generic questions and are not specific for cross-media research. The actual developments do indicate that the question about the orchestration of all possibilities of, for example, a retailer communicating with a customer is one of increasing complexity and urgency (Van Vliet, 2008). It is expected that there will be further shifts in channel use in the coming years. In the Wolters study (2013), according to the experts the following channels will grow: social media (from 4% to 6% share), in-store online sales (from 5% to 8%) and generalist retailer webshops (from 15% to 19%) at the expense of brand and producer webshops (from 31% to 24%). By 2020, there will be greater use of tablets (from 22% to 33%) and smartphones (from 10% to 21%) as sales devices, and this will be at the expense of laptops (from 32% to 15%) and desktops (from 31% to 10%). For fashion, by 2020 the estimated share of sales via a tablet is 26% for clothing and 31% for shoes and personal lifestyle. This shifting of channel use will require organisations to adapt their cross-media strategy appropriately to secure the orchestration of all of the options offered by (media)channels. And who knows, maybe tablets will eventually be replaced by virtual salespersons.

VIRTUAL SALESPERSONS

In a store you need staff. Gathering information from a salesperson is one of the benefits of physical stores. But in Australia they invented virtual salesmen. Would this work? It is best compared with a projector that projects a semi 3D-salesperson on an acrylic cut-out. Using the latest holographic projection technology, someone is filmed while delivering a presentation. The footage is then rear projected onto an acrylic cut-out that precisely matches the body shape of that person in order to give the impression of a semi-3D image. So it is not really a 3D hologram, but it looks like it. When finished, retailers can put the projector wherever they want. This 'person' can provide information about, for example, products. It can even 'hold' items like flyers or tablets. Reasons stated by Vision2Watch why retailers should consider purchasing such a projector, are that it could "offer an exciting and promotional alternative to the tired old human being" and because "it perfectly delivers your advertising message (over and over)".

The multitude of communication channels enable stores to communicate with their customers in a variety of ways and at a variety of times (Rangaswamy & Van Bruggen, 2005; Van Vliet, 2008). Using several channels also allows the possibility of providing improved service via channel integration, such as online ordering and offline collection, or offline returns of products ordered online. Online orientation and offline buying – known as webrooming - are undertaken by the vast majority of consumers (more than 80%); offline orientation and online buying – known as showrooming – is still considerably less, at just 44% for fashion (DigitasLBi, 2014). The Internet has specifically encouraged a cross-media approach because, for example, it has become very cost-effective to offer services and products through webshops. This service can result in greater customer satisfaction, increased loyalty, improved sales and larger market share. A cross-media approach has positive consequences for sales, consumers who use more channels buy more, they are more active, and they are more satisfied (Sharma & Mehrotra, 2007): "The average multi-channel consumer spends more than a single channel consumer. This is partly because multi-channel consumers have on average a higher income and spending pattern than other consumers. The exact increased amount in spending of multi-channel consumers ranges from two to ten times as much as single channel consumers." (Van Ameijden et al., 2012, p. 6). However, the generality of this statement is not encountered in all empirical studies (Teerling et al., 2007) and Wolters (2013), for example, finds that the omni-channel customer does, in fact, spend more but is less loyal. Retailers do say though that the expected increase in sales is the most important reason for a multi-channel strategy (Van Ameijden et al., 2012).

Online orientation and offline buying – known as webrooming - are undertaken by the vast majority of consumers; offline orientation and online buying – known as showrooming – is still considerably less

Each channel has its type of consumers and its motivations for using that channel. Motivation for using a channel can be economic advantage, product range, convenience, social status, opportunity, freedom of choice, greater satisfaction, social interaction, et cetera. It is not just the motivation that can differ per channel; the loyalty displayed to a channel and the degree at which cross-buying occurs can also differ. The latter refers to the level of 'reward' for the consumer and the time that it takes (channel adaption duration) to switch from one channel to another. This switching pattern is a significant challenge (Weltevreden, 2012). The most commonly used ways of encouraging online visitors into a physical store are: 1) special offers online can also be used in the store, 2) the webshop looks like the store, 3) products ordered online are collected in the store. Conversely, the most commonly used ways of encouraging store visitors to go the webshop are: 1) URL visible in the store, 2) webshop and store look alike, 3) special offers in the store can also be used online (Van Ameijden et al., 2012). Fashion businesses still make little use of online strategies for encouraging store visits (Boels & Weltevreden, 2013). An example of a similar looking webshop and physical store is Burberry, where the fundamental principle is that each element of the website is recreated offline (Williams, 2014).

BURBERRY REGENT FLAGSHIP STORE

"There was a time when sales assistants at Burberry would have carried tape measures. These days, those working at the luxury retailer's 545 stores, concessions, outlets and franchises across the world are rarely seen without iPads." In the Burberry flagship store at Regent Street all sorts of new digital solutions are offered to the customer to enhance the experience. A 'magic' mirror tells shoppers more about the item they are currently carrying with them, mannequins wear the same outfits as shown on the website, there is a giant screen that can be used to show the latest shows and they even put up a secret stage. The whole concept is to integrate off- and online to stimulate an immersive experience. In their video, Burberry explains that they want to tell authentic stories. And to tell authentic stories, they also believe that the language spoken is very important, and, as Angela Ahrendts puts it, "their [consumers] language was rapidly becoming digital". Hence, Burberry decided it should create that authentic experience by using both physical and digital languages and use the best of both to make it an immersive experience.

Times are difficult for the physical store

Consumers who still only use one channel for gathering information and deciding to buy are becoming a minority (Stone et al., 2002; Rangaswamy & Van Bruggen, 2005; Teerling et al., 2007; DigitasLBi, 2014). However, harmonising and managing channels, for example, in order to link customer data across different channels appears to be a significant challenge. The result of this is that returning customers are not recognised (whilst, for example, they are entitled to a discount) or customers are bombarded with the same information from different channels. It is about the integration of cultures, technologies, marketing strategies, elements of the organisation and understanding different consumer patterns; not exactly a trivial matter (PwC, 2007). Even more important: there are also negative 'drivers' (Sharma & Mehrotra, 2007). Firstly, the revenue drops when multiple channels are used: the revenues from a new channel are often lower than from existing channels. After all, those existing channels have the 'easy' customers tied to them. Furthermore, the costs of the acquisition and the maintenance of a new channel place pressure on the earnings, also because channels are still often maintained separately as far as the organisation is concerned due to their own (technical) infrastructure, staffing and management (Stone et al., 2002; Rangaswamy & Van Bruggen, 2005). Secondly, there is 'sales cannibalization'. In other words, the channels compete against each other for the total revenues. The most important way of preventing this is not to have price discrimination across different channels, to have complementary product ranges and to have an integrated stocking system (Van Ameijden et al., 2012).[12] Thirdly, channels can also come into conflict with each other because they differ in the information about products and services, for example, or because it is not clear whether the same products can be bought online and offline (Rangaswamy & Van Bruggen, 2005). Price differences can also result in conflicts and undesirable behaviour from the perspective of the business. Consumers also make use of this by gathering extensive information and having the product demonstrated in the store and then buying via the Internet.

THE PHYSICAL STORE IN A CROSS-MEDIA CONTEXT

The latter touches on a prominent concern in the retail sector: the role of the physical store. Times are difficult for the physical store. Newspapers regularly carry reports about the increasing number of empty stores and inner-city degeneration (Rijlaarsdam, 2013; Toonen, 2014) and unsettling reports are published about the loss of the high street (Erich, 2014). Reported causes for this are: the rise in online competition, direct selling by brand manufacturers, municipal policy, changing consumer buying patterns and a separation in the steps in the buying process as a result of which orientation, selection and transaction no longer necessarily have to take place in the physical store: "These days customers buy in a different way than they did in the past. Firstly we look on the Internet at what we want to buy, the prices and we compare products and then we decide where we want to buy. Buying in the store has become a choice and no longer a necessity." (Molenaar, 2011, p. 10).

The importance of the store is often substantiated by a number of specific figures that are repeatedly quoted – namely that 70% of buying decisions are made in the store and 68% of them are impulse buys (Stahlberg & Maila, 2012). This has caused a shift in budget to in-store advertising, eye-catching packaging and in-store special offers. However, the percentage of impulse buys is substantially lower (44%) and the majority of people use a shopping list (Levy, 2012). With regard to the 70%, Van Gaalen (2012) says: "We would love this to be true, but it does seem a bit high, doesn't it?" (p. 131). In his study involving more than 10,000 shoppers he found that only 20% of people made 'unplanned purchases': "the majority of shoppers *do* plan what products they will buy in advance, as well as which brand they will buy. (…) The effect of in-store impulses is lower than many people like to believe." (p. 132). An even more important argument that makes a plea for the physical stores is to refer to the conversion ratio of shops: "Conversion rates in the physical stores are way better than in the online world. (…) The conversion rate from going to a site to buying something is only 0.5 to three per cent. In the real world it's 20 per cent in fashion, 50 per cent in electronics and 96 per cent in grocery stores" (Williams, 2014, p. 116).

POPUP STORES

All over the world, stores pop up that are aimed at short-term sales. That is, creating a temporary venue where customers can buy, for instance, niche products. According to Wikipedia, Vacant (LA) was the first company that began to experiment with the concept. The store 'pops up' within only a couple of days, for it to quickly melt away (within a couple of days or weeks). As such, these temporary sales venues are very suitable for seasonal specials. In a time where some brick-built stores can no longer pay their rent, partly due to growing online sales, cities are having to deal with increasing numbers of empty outlets. Empty stores and offices don't make anybody happy. They are even a little bit depressing. So why not transform them into a temporary store? This is a great opportunity for brands that do not want to spend great amounts of money on a monthly basis, but do want to sell seasonal products, or just get temporary attention. In the Netherlands, specific websites or apps help those interested in setting up a temporary store. These websites show where vacant and available stores are located. An example is Popupsquare. Popupsquare is a platform for pop-up stores. Pop-up queen Caroline de Jager initiated the concept, because she believes that nobody benefits from vacancy. Not the consumer, not the owner of the property and not the retailer. Popupsquare brings people together who are looking for an empty store with people who are offering an empty store. Becoming a member of popupsquare.nl makes it possible to see other peoples' posts. Then you fill in your own profile and let others know what you are looking for or what you have to offer. If you're really serious, you also write down your plan for the store.

The positioning of the physical stores as a channel must take into account the strengths and weaknesses of the channel compared to a different channel, such as webshops, for example (see also Van Vliet, 2008). Table 3 contains a list of the features of these two channels. These features relate to the selling of physical products. For digital products, such as music downloads and streaming (iTunes, Spotify) and the purchase of tickets (travel, concerts) it seems that the argument is already won because this is where the disappearance of physical stores is happening the most.

Physical stores	Webshops
- Limited opening times	+ Open 24/7
- Accessibility	+ Always accessible online
- High overheads	+ Low overheads for webshop
- Limited product range	+ Unlimited product range
- Local reach	+ Worldwide reach
± Limited knowledge gathering about customers (customer cards)	+ Extensive knowledge gathering about customers
+ Personal contact/advice from staff	- Anonymous
+ See, feel and try a product	- Products are not tangible
+ Take away immediately	± Delivery can take a relatively long time
± Store appearance	± Webshop appearance
+ Location (local embedding)	- Ability to find webshops

Table 3: Features of the physical store versus the webshop channels[13]

What is interesting are the crossovers that are created for parrying the strengths of the other channel.[14] The concept of the 'endless aisle' in the store is intended to counteract the normally limited product range by also presenting the online product range to the in-store customer, but with the added benefit, for example, of advice from the store staff. Another crossover is to remove the queues at the tills in the physical store by having a lot of staff in the store so that the customer can pay immediately (Apple Store in Amsterdam), or the endless searching in a supermarket for a product whilst it can be found immediately online: "To illustrate the future role of the

portability of mobile devices, consider a customer with a RFID-enabled mobile device that also contains a personal shopping list. When he walks into a grocery store, the store's RFID reader can identify him and match his preferred brands to the listed items. The mobile device can display an in-store aisle-by-aisle route using the GPS, update the invoice in real-time as items are added in the shopping cart, and make an electronic payment as he walks out the store without having to wait in line to pay." (Shankar et al., 2010, p. 119).

DIGITAL STOREFRONTS

Have you ever visited a shopping mall after closing time? Or walked through a street with empty stores? This is often very depressing. It is abandoned, because there is simply nothing to do. Digital storefronts can contribute to lively surroundings, even when stores are closed or empty. Digital storefronts are touchscreen store windows made from connected glass. These windows provide customers with a virtual shop in a real mall or shopping street. It is interactive and never closed. It is online shopping, with an offline experience. How does it work? Customers see these digital store windows and can swipe through a virtual collection. Whether it's after closing time or not and whether the store behind the window is empty or very crowded, this digital storefront is always open. If customers see something that they like, they can hit the 'order' button and a link will be sent to their mobile phone. That way, people can pay in private with Paypal, for example. To use the words of Steve Yankovich, eBay vice president of innovation and also the man that partnered with the retail experience firm Westfield Labs to launch a series of digital storefronts at the Westfield San Francisco Center: "It brings the best of online and new technologies to the physical world".

The majority of survival scenarios for the physical store focus on the strengths of the store and the weaknesses of the webshop: personal contact/advice from the staff, the ability to feel and see products and the appearance of the store/local environment: "Online shopping lacks the aesthetic value compared to traditional shopping - colours, fabric and sizes - as well as the fun and social component" (PwC, 2013); "The ambiance in a shop is becoming an increasingly important sales aspect " (Hofste & Teeuw, 2012, p. 22); and "Shops have to create added value through advice, the presence of physical products or through offline experiences." (Molenaar, 2011, p. 112). This is also what consumers themselves say are the most important reasons for continuing to go to the shops: seeing and trying the products, personal in-store advice from the staff, immediate availability of the product as well as special in-store offers (DigitasLBi, 2014). For consumers, the most important reasons for not ordering online are: want to see/feel products before buying (37%), delivery costs too high (36%), concern about quality of products (26%) and the ease of sending returns (20%) (Schut et al. (2014). Capitalising on the physical location / environment of the store results in all kinds of scenarios for achieving the best possible response to the unique location and the consumer who is present there, such as in inner cities and at train stations, workplaces and events (see INretail, 2014).

A recurring word is 'experience': shopping must be an indelible experience and must mainly be enjoyable (Molenaar, 2011; Rijlaarsdam, 2013; Van Heusden, 2013; Shopping2020, 2014b).

Occasionally, it seems that naivety strikes and it is merely a question of a coffee corner and a smile from the staff: "Think, for example, of a social corner with newspapers, magazines and coffee, a smile from friendly staff, videos and music in the store, nice posters and terminals where purchases can be made. It's not so difficult" (Molenaar, 2011, p. 21). The fact that it is somewhat more complicated than this is evident from, for example, the experience of the J.C. Penney clothing store. This department store brought in Apple's top manager Ron Johnson in order to address falling visitor numbers and sales. The restyling resulted in an interior like an Apple retail store: austere white cabinets, bright light, natural varnished wooden floor, lots of space and no special offers. The customers fled en masse to competitor Target (from where Johnson was once headhunted by Apple!) on the other side of the shopping centre. Exit Apple big shot (Van Heusden, 2013).

INTEGRATED FRAMEWORK: SERVICESCAPES

In the above description of the (future) retail landscape we have seen a lot of sub-problems and partial solutions and a number of mantras such as 'experience'. In order to view the developments, problems and opportunities in a more structured manner we need an integrated framework – one that distinguishes the relevant components, establishes relationships between them and generates with hypotheses that can be tested. This integrated framework will have to relate to the 'service encounter', the contact moment between customer and service. The way in which the customer 'enters' the moment is important (expectations, mood, state of mind, etc.), as well as how the service is orchestrated by the provider. From the point of view of cross-media, it is interesting to see what role the physical environment or store plays in relation to the strong forces of digitalisation and new media. The theoretical framework that we shall use for this is the conceptualisation of 'servicescapes'.

In order to view the developments, problems and opportunities in a more structured manner we need an integrated framework

Bitner (1992) introduced the term servicescape.[15] In her study, Bitner shed light, from a marketing perspective, on the influence of the physical environment on consumers and staff. To indicate this, Bitner used the term servicescape: "All of the objective physical factors that can be controlled by the firm to enhance (or constrain) employee and customer actions." (1992, p. 65). The most succinct expression of the role of the servicescape is in service environments such as hotels, restaurants, banks, stores and hospitals. These are typical service organisations where consumers and staff have direct contact in complex and decorated environments. The services are produced and consumed simultaneously and the consumers are, as it were, 'in the factory': a dental treatment, a visit to the hairdresser, eating out and going to a concert are examples of this. This is in contrast to services such as a self-service laundrette or filling station where, in fact, it is only the consumer that acts, and where services can be delivered reasonably 'lean' like the products sold on the market or a motoring breakdown service.

Servicescapes are about a space manipulated by people. That manipulation can take on many forms, for example, light, temperature, furniture, music, colour, room layout, symbols, artefacts, etcetera. According to Bitner, all of these different types of manipulation can ultimately be allocated to three dimensions:[16]

1. Ambient conditions. These are features of the space such as temperature, light, sound, music, smell and other aspects that have an immediate effect on our senses. Many studies into workplaces show that these factors have an influence on staff performance and satisfaction. Consumers are also influenced by these factors: the tempo of music in supermarkets influences the tempo of shopping, the length of stay in the supermarket and the amount spent; in restaurants customers stay longer and they drink more when the tempo of the music is slower. Familiarity with the music also has an influence: if customers do not know the music in a store they think they have been shopping longer than is actually the case. The same applies to a pleasant smell: consumers think they have not been in the store for as long as they actually have been and they also give a more positive evaluation of the store. Modalities also reinforce each other: a combination of a Christmas smell and Christmas music has a stronger effect than if they are experienced individually. This cross-modality is, however, complex: music that is or is not congruent with the product influences, product recognition and the likelihood of a sale (also see Peck & Childers, 2008).
2. Spatial layout and functionality. This is about the spatial arrangement of fittings (furniture, plants, etc.) and their mutual positioning. It is also about the support that the spatial layout gives to achieving specific aims. An example of this is whether the checkouts in a store are clearly visible and easily accessible for the customers so that they can pay quickly. The addition of plants and flowers in public spaces and benches for sitting on sometimes has substantial consequences for behaviour in that space. However, not much research has been conducted into the question of how consumers experience these types of manipulation. One example is a study on the behaviour of business people that travel regularly and often stay in hotels. They seem to make hotel rooms look more like home by moving the furniture until the arrangement is 'like home'. Another trick they use to feel more at home is personalising the room by removing all objects and signs that refer to a hotel and replacing them with their own objects (Bardhi & Askegaard, 2011). It is a known fact that people in spaces where they have to follow a route, walk faster through the second section. This applies to museums (Van Vliet, 2009) and to stores as well: "In general, as shoppers get nearer and nearer the checkout they shop faster and faster - using most of their 'leisure time' at the beginning of the trip. The phenomenon is so pronounced and regular that we refer to it as 'the checkout magnet'." (Sorensen, 2012, p. 57/58).
3. Signs, symbols & artefacts. There are all kinds of explicit signs present in rooms, from labels (name of a company, advertising) and directional signs ('exit') to signs that communicate codes of conduct ('no smoking'). However, there are also all kinds of implicit signs, symbols and artefacts that say something about the space: white table cloths and dimmed lights in a restaurant represent good service and high prices; the size of the desk and the certificates on the wall influence the image that people have of the manager or therapist. This is a complex totality that cannot always be kept 'under control' or interpreted as was originally intended.

These three dimensions are intended to describe the influences of the servicescape clearly, but they will not be experienced as separate dimensions by the consumer. The consumer will form a holistic image on the basis of all of the servicescape stimuli. Bitner calls this general impression the *perceived servicescape*. This perceived servicescape seems to affect how people experience the quality of the goods on sale and the service (Baker, Grewal & Parasuraman, 1994). The perceived appearance of a store ('atmospherics') appears to influence the consumer's (buying) pattern and shopping experience (Turley & Milliman, 2000).

Customers will react to the environment in a specific manner. Bitner also divides these reactions into three dimensions: cognitive, emotional and physiological dimensions. The influence of the physical environment on the cognition, emotion and physiology can differ in strength and in 'direction' (positive or negative), where that influence is partly determined by the personal and situational factors. Personality characteristics, such as 'arousal-seeking' indicate that some people specifically choose certain environments (bungee jumping, wild-water canoeing) and that they also experience these differently from what are known as arousal-avoiders ('at home in front of the TV'). A person's mood is also important: being tired after a frustrating day's work instead of just returning from a relaxing weekend has an effect on how one experiences a busy restaurant. Bitner ultimately says that consumers can react to a space in two opposing ways: approach and avoidance. Approach is about wanting to stay in the space, investigate it and spend money in it and wanting to return to it. Avoidance is the opposite of that: want to go away, not wanting to return, having no interest in it, et cetera. Ezeh & Harris (2007) also incorporate this aspect in their definition of servicescape: "The design of the physical environment (with or without customer input) housing the service encounter, which elicits internal reactions from customers leading to the display of approach or avoidance behaviours." (p. 61).

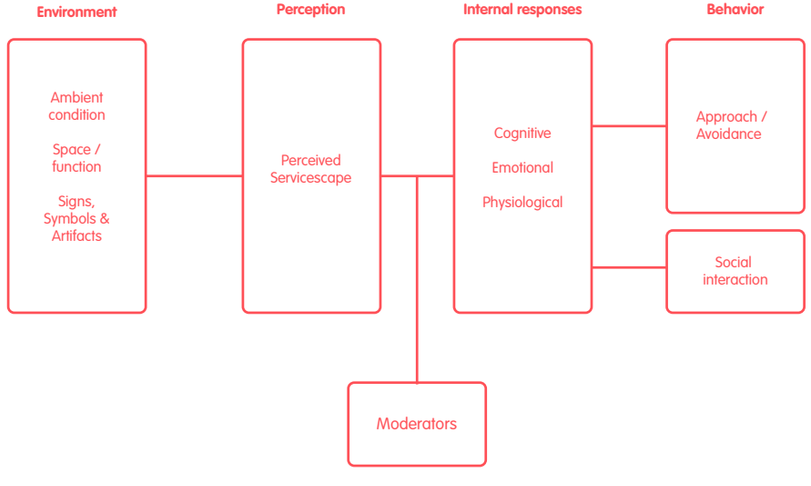


Figure 4: Bitner's model of Servicescapes[17]

Incidentally, the servicescape does not just influence individual behaviour, but also the nature, quality and the development of social interactions that take place within the space. The layout of the physical space has a demonstrable effect on communication patterns, group formation and group dynamics. Particular environments invoke predictable social behaviour and activate conventions about how to interpret the situation (Goffman, 1974). A theatre, a train compartment and a waiting room at the dentist all have their conventions and behaviours that are influenced by the specific physical layout of these rooms.

Experiencescapes are specific spaces that are selected, designed and managed in order to create, support and correctly guide experiences

Bitner's model of servicescapes (Figure 4) is generally considered to be relevant (Eroglu & Machleit, 2008), but, strangely enough, the empirical research into the role of servicescapes is relatively limited (Turley & Milliman, 2000; Ezeh & Harris, 2007). Furthermore, the empirical research that has been conducted is often just about the influence of a single element, for example, smell or colour "…to the extent that little is known about the global configurations of aspects of the servicescape" (Ezeh & Harris, 2007, p. 79). Or it only focuses on part of the model, such as demonstrating that the emotional state of shoppers is a predictor of buying patterns (Donovan et al., 1994) or the discovery of irritating aspects in the shop environment (D'Astous, 2000). The research that has been conducted is still focused on causal micro-relationships and not on the 'Gestalt' or the visitors 'holistic' experience. In brief, the 'global configuration' (Eroglu & Machleit, 2008).

Conceptually, there are also remarks that can be made about the Bitner model, for example, with regard to the social factors. Bitner explicitly omits these as part of the servicescape and only refers to them as a resultant within her framework. Other researchers do postulate the social factors as a significant influencing dimension of the servicescape because social interaction constitutes part of the space. In addition, there are also new research areas that have presented themselves and which Bitner could not have foreseen, namely those of the online servicescapes, which are also known as e-scapes.[18] The assumption is that a different configuration is applicable here: "Customers do not move around virtual environments the same way in which they do around physical environments" (Shankar et al., 2010, p. 113),[19] as well as a different experience (Novak, Hoffman & Yung, 2000). Not only do we have to regard these e-scapes as a separate phenomenon but we also have to place them specifically in the relationship of the physical space: the digital environment 'in' or 'on top of' the physical space. This has not been sufficiently researched in the context of experiencescapes so far.

Finally, the servicescape model is not elaborated further for specific 'subtypes' of scapes.[20] Research into servicescapes often includes analyses of cases, such as a specific shop or shopping centre (Sherry, 1996). In the book *Festivalbeleving* (Van Vliet, 2012) there is a proposal to

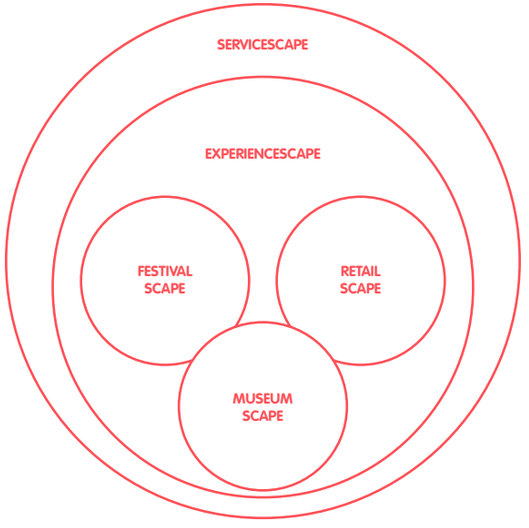


Figure 5: Types of 'scapes'

characterise a specific sub-class of servicescapes as experiencescapes. Experiencescapes are servicescapes that are configured for the visitor experience. The layout of stores, museums, sports stadia, restaurants, shopping centres, city parks and tourist attractions no longer focuses exclusively on the most efficient and effective service delivery but increasingly emphasises creating the experience. We no longer drink beer in a pub but rather in an Irish pub or the Hard Rock café, we don't eat in a normal restaurant but rather in the jungle of the Rainforest Café and we shop in the Wild West themed shopping centres that promise a rich shopping experience. Entire districts (China Town, Old Pasadena), cities (Las Vegas), regions (Merrie England) and even islands (Hawaii) consist of 'cardboard' nostalgia where we can re-experience the real, authentic China, England or whatever. These nostalgiascapes or retroscapes (Brown & Sherry, 2003) are only one interpretation of what we can more broadly designate as experiencescapes. Experiencescapes are specific spaces that are selected, designed and managed in order to create, support and correctly guide *experiences*. These experiencescapes are sought out by visitors with the specific expectation of an *experience* (O'Dell, 2005).

Within *experiencescapes* we can make further subdivisions into, for example, festivalscapes (Van Vliet, 2012), retailscapes and museumscapes (see Figure 5). Recurring research questions for this will be: What is the 'global configuration' of an experiencescape? What relationship is there between this configuration and the consumer/visitor experience? What is the role of digital media in the experiencescape and when, how and to what extent does it influence the configuration of those experiencescapes and the experience? What are the differences between the sub-categories of experiencescapes (festivals, museums, stores) and what relationship do they have with the experience? What is the role of social factors in the experience of experiences-

capes? How can the analysis of experiencescapes contribute to a more refined *value proposition* for new services and products when developing business models?

INSIGHTS AND CHALLENGES AMSTERDAM FASHION RETAILERS: EXPERIENCES

A fourth insight revealed in the interviews with Amsterdam fashion retailers is the recurring topic of experience. With regard to the role of the physical stores, the interviewed fashion retailers are very clear: "You still need physical stores, because customers want to feel the product or get advice from the staff" (Anonymous retailer M, 2014). But they do stress the necessity of service, just giving that extra special feeling when in the store. A couple of retailers specifically mention the strength of a combination of both digital and physical in this respect: "I think that people really want to try on the clothes first, which they will do in store. Then they walk out the store, take a couple of days to think it through, and then order it online. You have to offer that service" (Anonymous retailer I, 2014).

Service and experience are aspects that are important according to all retailers. "The option to order for free, give them coffee, tea or even Prosecco when they are inside the store, or being able to quickly alternate clothing in our own sewing atelier; it all matters" (Anonymous retailer V, 2014). And we all are too well aware of those special 'membership' days, where membership card holders get access to sample sales, special events or evening sales.

But a couple of retailers really want to take it to the next level. "My dream is to open up a big store. With a huge table, right in the middle, so that people can read the newspaper or browse through a collection of (art)books that they can then also buy here. The store will be all about giving the customer that extra special experience. So when customers come to the store, they sense a great atmosphere, they can touch, feel and fit the clothing and relax at the same time" (Anonymous retailer M, 2014). Another retailer (V) is really curious about the possibilities of the interactive mirror. She feels that the interactive mirror provides customers with more service when searching for the perfect outfit. She even believes that interactive mirrors can take over – to some extent – the activities of a sales assistant. Which seems to contradict one of the strengths of the physical store: personal advice from real people.

CONCLUSION

An interactive full-length mirror is just one of the many innovations that are currently on offer in the fashion retail sector that will doubtlessly force the retailer to ask himself 'What am I to do with it?' Is such a technological innovation to be used as a PR stunt in order to boost the image of being an innovative organisation; is it a means of drawing attention in an unconventional way and thus achieving positive customer attitude (Hutter & Hoffmann, 2014); is it an alternative to existing processes or can it be integrated into existing processes? Even aside from the costs and revenues, this is already a stressful situation that is difficult to avoid because technological innovations are ongoing. As a deer staring into the headlights of an approaching car, many retailers go numb, and it is, therefore, not surprising that: "Many retailers are restrained about introducing new technologies" (PwC, 2014). A conclusion reflected in our observations of innovative behaviour of fashion retail stores in Amsterdam and the interviews with Amsterdam retailers. The interviewed retailers were often struggling with their 'omni-channel' strategies, especially because retailers find it hard to predict which innovations could really benefit them. Fashion retailers are aware of the fact that consumers do a lot online, but the knowledge of how to respond to that was not always present. We think the quote taken from Kilcourse & Rowen (2014) is the most to the point in this case: "There is a vast distance between retailers' understanding of the value of many of today's technical solutions and actual use - even though many of those technologies have been available for quite some time" (p. ii).

If we skip the recurring discussion on what to call it (cross-media, transmedia, omni-channel, et cetera), the underlying drive is to find a conclusive answer or final understanding about how organisations should use media as an instrument in their communication with and service development for their customers. Formulated in this way it reveals that, despite all new semantics, the underlying questions have not really changed. Organisations are making (strategic) decisions about how to put all kinds of media to use in order to attract, inform, persuade and lock-in customers to whatever goal they set themselves. Due to a plethora of media occurrences, each with their particular characteristics and usages, and the many contextual variables that are apparent in any offer an organisation makes, there is a monumental task in figuring out what works and what does not work at a certain time for a particular consumer. This task has been

referred to as 'orchestration' (Van Vliet, 2008). Different concepts can be regarded as being different interpretations of, or, different perspectives on this orchestration. Cross-media focuses on the interrelatedness of the various media or channels used in the orchestration; transmedia or 'sequential storytelling' (Kleverlaan, 2014) focuses on the storyline being told throughout this orchestration; multi-channeling looks at the unique channel features of each channel and their overall contribution to the set targets.

This orchestration is in the hands of the organisation. From the specific goals organisations set themselves, they orchestrate media (channels) in order to reach those goals, be they economical gain, cultural enlightenment or societal well-being. Orchestration is an intentional act, meaning it is directed at someone. That someone is persuaded, consciously or unconsciously, by the offering or seeks out the offering actively based on their own agenda, or should we say their own orchestration of needs, wants, intentions and habitual behaviour. The point to make is that there are two sides to the service encounter: the orchestration of an offering by the organisation and the experience of that offering by the customer. Sometimes it seems that these two sides are not taken fully into account, especially their differences that are grounded in respectively organisational capabilities and psychological constellations. Based on these two sides of the service encounter, one can argue that the omni-channel concept represents the viewpoint of the customer's experience far more, and the concept of multi-channel is a point of view far more related to the organisation. Ignoring this two-sidedness, one can easily dismiss multi-channel as ancient history when taking a consumer-centred approach (Dorf, 2010; 2011; Ter Haar, 2014). Of course the two sides must meet - the so-called service encounter, or to use a more popular contemporary term 'touchpoint' -, which in some ways is the moment of truth regarding the continuation of the organisation and customer loyalty.

Applied research can help organisations to formulate a consistent and robust orchestration and find ways of translating this into a specific service offering to customers. Such a focus obliges us to investigate concepts like media, cross-media context, experiences and services: an extensive research agenda by any measure. The servicescape concept has been introduced for this which, with a number of adaptations and expansions, forms a promising framework for analysing service encounters and helping retailers to find answers to pressing questions on renewal of their business.

END NOTES

1. The following categories have been included in the consumer spending for this: Food/Near-food/Health, Home & Garden, Fashion: Clothing, Consumer Electronics, Insurance, Package Holidays, Fashion: Shoes & Personal Lifestyle, Individual flight tickets and accommodation, Telecom, Media & Entertainment, Toys (excluding games), Event Tickets, Books, Sport (hard-ware) (Wolters, 2013).
2. Online is defined here by GfK as buying via a Smartphone, tablet, desktop, laptop, in-store devices, watch/glasses (Wolters, 2013). What is, of course, striking here is that the 'in-store' devices have been included as online. What is necessary is a distinction between where (physical store, at home, en route) and with what (devices) the purchase is made so that the figures can be interpreted properly.
3. An explanation for this difference is not given. Referring to the *wisdom of the crowds* ap-proach in the case of experts (Wolters, 2013) is in any event not a valid argument in as much as a number of essential conditions for the effect of this approach are not met (see Van Vliet et al., 2013).
4. The differences in figures can be explained by the difference between orientation and buy-ing. Consumers can go to the store for orientation but in the end they buy the product online. This is why the figures between online buying and visiting a physical store are not mirrored.
5. Exceptions to this are the Kega publications (2013, 2014). However, the presentation of the innovations is reasonably random and in any event has no explicit underlying system.
6. A similar observation can be made regarding the digital innovation ambition of museums (Van Vliet, 2013).
7. The elements stated by Erdman show similarities with elements identified by Van Vliet (2012) as the elements with which a festival organization can manage the festival experience (so-called FestivalDNA).
8. Which, of course, says nothing about a causal relationship, only that there is a relationship between Smartphone use and spending.
9. See http://mumbrella.com.au/special-k-launches-experiential-social-campaign-in-westfield-172747.
10. We have omitted the crowdsourcing phenomenon here for which, as a matter of fact, there is also an exchange involved: time and knowhow are 'exchanged' for a better reputation, attention, a good feeling, etcetera. See further: Van Vliet et al., 2013.
11. See www.pinterest.com/fashionreatilfu/ for a visual report of this process by students in relation to their purchasing process. We do not discuss Molenaar's ORCA model (2011) here because it does not add a lot and is also a model that is not without its problems, both in the linear character and in the actual modelling (semantics of arrows, process steps and outcomes are swapped, et cetera).
12. The aspect of cannibalization now appears to have less of an effect: "Although multi-channel retailing is often associated with cannibalization of revenue between channels, we find that today's multi-channel retailers appear to suffer less from its effects." (Van Ameijden et al., 2012, p. 11). However, 18% of the retailers questioned said that this had an impact to a large degree.
13. The list is loosely based on Molenaar (2011), because he sometimes contradicts himself (for example on the product range, comparison possibilities) and also uses very subjective crite-ria (according to Molenaar you can't shop online for fun, it's "niet leuk" [no fun]).
14. See the following Google videos about the differences between online and offline and our expectations about them: www.youtube.com/watch?v=cbtf1oyNg-8; www.youtube.com/watch?v=3Sk7cOqB9Dk; www.youtube.com/watch?v=N5WurXNec7E.
15. This section is based on the paragraph about servicescapes in the book *Festivalbeleving* Festival Experience (Van Vliet, 2012).
16. Alternative classifications are available (see, amongst other things, Baker, Grewal & Parasur-aman, 1994; Turley & Milliman, 2000; D'Astous, 2000). However, the differences are margin-al. It is interesting to perform a meta-analysis on this and to relate the aspects found to, for example, analyses of social situations, like in the study by Goffman (1974).
17. This is a simplied version of the original model, taken from Van Vliet (2012).
18. See Venkatesh (1996) for an initial reflection.
19. But compare: "Online shoppers are affected by the methods of shopper marketing in a very similar way to the traditional shopper, even if the context is not the store and the shelf, but the browser and the computer screen." (Kotler in: Stahlberg & Maila, 2012, p. ix).
20. An exception is the study of Appadurai (1990) who employed a typology of scapes for the global cultural economy for which he identified five scapes, which he called financescapes, mediascapes, technoscapes, ethnoscapes, and ideoscapes.

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An interactive full-length mirror that allows your customers to browse through an endless collection of clothing that you offer and see immediately whether something fits them, including when they turn around, and which also allows them to send a picture quickly to their family and friends to hear what they think. This mirror is a technological development that is already possible and which is being introduced in fashion stores here and there.
But how probable is it that this technological innovation will become a permanent feature of our shopping experience? How probable is it that you as a retailer will invest in such a mirror? And does such an innovation will save the physical store from becoming obsolete while more and more consumers are buying online? And who is that consumer anyway and what does he or she need?

In *The Fashion Retailscape* developments in (fashion) retail are critically analysed and enriched with insights from retailers in Amsterdam.

ABOUT THE AUTHORS

Harry van Vliet is head of the Cross-media research group at the Amsterdam University of Applied Sciences. This research group examines the impact of new (technological) developments on business innovation and consumer experiences. As a trained psychologist he holds a PhD in the humanities from the Utrecht University. He publishes regularly on topics such as consumer experience, media strategy, crowdsourcing, cross-media and business model theory.

Anne Moes, researcher at the Cross-media research group, is primarily engaged in research on innovations in fashion retail environments and its impact on the shopping experience for customers. She also teaches at the Amsterdam Fashion Institute in 'Fashion in Retail & Marketing'. Anne graduated in persuasive communication (University of Amsterdam) and wrote her master thesis on the effect of different emotions in charity advertisements.

Bernadette Schrandt works as a researcher at the Cross-media research group and has a degree in Media and Performance studies (Utrecht University). She is specifically interested in embodied experiences: how consumers behave in mediated environments and how their interaction with these media creates meaningful experiences to them. Her research mainly focuses on cultural experiences.

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