



## Research article

## Omnichannel in the fashion industry: A qualitative analysis from a supply-side perspective



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## ARTICLE INFO

## Keywords:

Omnichannel  
Digital experience as marketing strategy  
Qualitative study  
Fashion industry  
Supply-side perspective  
Technology adoption  
Business management  
Strategic management  
Marketing  
Globalization

## ABSTRACT

Currently, many companies are abandoning multichannel and turning to a much more centralized model known as omnichannel, in order to gain a competitive advantage by integrating and optimizing different channels and thus the client has a unique experience. Within this context, the aim of this study is to analyse the omnichannel digital marketing strategies implemented by Spanish fashion and accessories companies in order to provide pleasant shopping experiences to their online consumers. To that end, a qualitative analysis has been carried out, specifically consisting of in-depth interviews conducted with marketing managers who implement digital strategies in their businesses to improve the online experience of consumers in an omnichannel context. From a practical perspective, this study can help inform companies' decision-making on how to best develop their consumers' omnichannel experience and, in consequence, improve consumers' behavioural responses such as personal participation, satisfaction and engagement with the firm.

## 1. Introduction

Companies are beginning to realize that the market has changed, and that consumers are by nature omnichannel, i.e. they access the company through different channels. Companies thus need to improve the omnichannel experience. To this respect, authors such as Moes and van Vliet [1] point out that consumer behaviour reveals a need for retailers to integrate channels in order to better serve customers; consumers naturally combine these channels, while retailers are still analysing how to integrate them, indicating that omnichannel via is the best to obtain these objectives. Against this background, this study focuses on the fashion industry, since fashion has become one of the most important sectors of the world economy, a key element in the international financial markets, and a distinctive tool of contemporary cultural movements. In addition, the globalization of communications has led these companies to make both commercial and communicational changes in the way they address their public (massive, complex and demanding) reaching markets that would have been impossible before [2].

Specifically, in the fashion industry, this phenomenon is happened currently. In fact, according to the Spanish Fashion Observatory report [3] prepared by the ISEM Fashion Business School omnichannel is here to stay. Although the physical store is still the main point of purchase, consumers in Spain are demanding to be able to interact and communicate with brands through different channels (corporate site, online store, Apps, social networks, etc.). In fact, omnichannel already accounts for 40% of purchases in the sector.<sup>1</sup>

In Spain, the fashion industry is considered strategic because it is a dynamic sector that translates into growth in exports and job creation, and accounts for one of the largest shares of the national economy (Gross Domestic Product, GDP) according to the ISEM Fashion Business School. In the case of GDP, the share of the fashion industry in the Spanish economy remains steady despite the growth of the economy as a whole, according to the Economic Report on Fashion in Spain 2017, prepared by Modaes.es and the Center for Textile Information and Clothing.<sup>2</sup>

To this respect, the economic data on the fashion industry in Spain [3], this sector represents 2.8% of Spanish GDP; in terms of employment, the share of total employment in the retail part of this sector is 18.7%,

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<sup>1</sup> <http://observatoriomodaespañola.com/wp-content/uploads/2016/06/INFORME.pdf>.

<sup>2</sup> <https://www.modaes.es/entorno/la-moda-mantiene-su-poder-como-fuente-de-riqueza-en-espana-y-contribuye-un-29-al-pib.html>.

while the industrial part of the sector accounts for 8.6% of total employment; the total annual turnover of this sector is 67 million euros; and as for foreign trade, this sector represents 8.4% of Spain's exports and 8.9% of its imports.

Nowadays, the majority of fashion consumers, look for and compare the multiple channels through which they access the brand before making their purchase. The consulting firm PwC [7] carried out a study of 1,000 consumers aged between 16 and 65, based on interviews and an analysis of behaviour on social networks, concluding that omnichannel in the fashion industry is here to stay. Although purchases in physical stores are still predominant, accounting for 60% of the total, consumers demand greater communication with companies through different channels. According to data from the Spanish Fashion Observatory [3], "more than 80% of online shoppers (47% in the case of offline shoppers) say they consult brands' websites or Apps, and 53% consult social networks (29% in the case of offline shoppers)".

In the online context, it is important to take into account some data related to digitalization in Spain: 90% of people in this country have used their mobile phone for at least one stage of the purchase process; Spain is one of the countries in the European Union in which the mobile phone has had the greatest impact; 60% of people in Spain have made at least one purchase via mobile phone. In short, companies should take this trend very seriously in order to continue making progress and satisfying their customers [11]. Specifically, it is important to note that it is Generation Z that should presently be receiving the full attention of fashion marketers. This generation has succeeded the group that had previously been the target of marketers, the Millennials. The latter generation was born between 1980 and 2000, and was characterized by their adeptness with digital communication and the delay of certain stages of adult life, such as their introduction to the world of work or the age at which they get married [18]. The simple reason for separating the two is because Generation Z was born when mobile phones already existed in the market. This generation comprises the 13–17 age group and has the following features [19]: they get their first mobile at the age of 12, compared to previous generations who got their first mobile between the ages of 16 and 20; the digital device (e.g. mobile, tablet, laptop, TV, etc.) that they use the most (78%) is the mobile phone; they mainly use their mobile phone for instant messaging and watching videos online; and 53% of this group shop online via mobile phone.

Based on previous premises, the aim of this paper is to analyse the omnichannel strategy in the Spanish fashion and accessories industry, in order to contribute to the literature on firms' implementation of different digital marketing strategies to improve the consumer experience in a multichannel context and, in turn, generate satisfaction, engagement and other positive consumer responses. Thus, we first review the literature on the fashion industry focusing on an omnichannel context. We thus analyse what is understood by the term omnichannel and address the role of omnichannel as a marketing strategy within the fashion and accessories industry. This is followed by a discussion of the methods used in qualitative research focused on the digital marketing managers of companies—both start-ups and established firms—dedicated to the production and marketing of textiles, footwear and accessories, as well as associations of experts in the fashion sector. Next, we explain the main results of the qualitative research carried out through 20 interviews in geographical areas of Spain with large-scale production and sales of these types of products. Finally, we present the main conclusions drawn, as well as possible implications for the companies under analysis.

## 2. The fashion industry in an omnichannel context

### 2.1. Lipovetsky's theory of fashion

For Lipovetsky [4], fashion concept represents a characteristic feature of the West and of modernity. In its essence, it contains important elements that define our socio-historical future, which is why this author

considers it as "one of the mirrors that allow us to see what constitutes our most remarkable historical destiny: the negation of the age-old power of the traditional past, the frenzied modern passion for novelty, the celebration of the social present" (p. 11). Thus, in the history of fashion, the expression of novelty and human individuality represent the prevailing factors underlying the emergence of fashion in the late middle ages. Lipovetsky [4] highlights the value of an understanding and analysis of fashion given that some of its principles, such as ephemerality and seduction, "have become the principles of modern collective life" (p. 13). Think, for example, of the characteristics of supply in the market society, where novelty is a central factor, and products acquire an ephemeral character, all under the influence of the seductive proposals of marketing and advertising. Indeed, the same author speaks of the "advent of a society restructured from top to bottom by the attractive and the ephemeral", considering the advent of fashion as "the primary agent of the spiralling movement towards individualism and the consolidation of liberal societies" (p.13).

This theory emphasizes social evolution in terms of fashion, indicating that a "closed, anonymous, static system gave way to a system that in theory has no determinable limits, a system open to the personalization of appearance and intentional change of forms" (p. 51). Historically, fashion has been based on the value and vindication of individuality; it emphasizes the legitimacy of the individualism of taste, which has developed in parallel to economic and religious individualism, and which preceded the ideological individualism of the egalitarian era. Personal autonomy in the expression of elegance has preceded the valuation of the individual, characteristic of modern ideology. Fashion has been used to express "an invention characteristic of the West: the free, detached, creative individual and its corollary, the frivolous ecstasy of the self" (p. 52).

Fashion has become increasingly instant; whereas collections were previously governed by the cadence of the climatological seasons, we are witnessing the proliferation of collections over the course of a year. Indeed, "*fast fashion*" is a clear representation of this trend. This has been made possible by the development of production systems that cut the time between design and manufacturing. But this process of immediacy also seems to have an impact on the agents that have traditionally played a relevant role in the creation and diffusion of fashion.

In short, we can observe the existence of a growing tendency towards less mediation and greater immediacy.

### 2.2. The meaning of omnichannel concept

Omnichannel refers to the union of the different channels of communication or contact a company has with its customers. The aim is for the customers, regardless of the channel they use to access the product, to perceive a homogeneous shopping experience. This concept has evolved from the multichannel concept. While multichannel also refers to the set of channels through which a company can interact with its customers, there is no integration of channels with multichannel, as there is in the case of omnichannel [5].

Therefore, to ensure the client has a better shopping experience, it is necessary to integrate these channels and for the company to provide omnichannel access. A company can connect with its customers through direct and indirect channels [6]. Direct channels involve a direct interaction between the company and the customer, e.g. physical store, telephone sales, etc. With indirect channels, the company uses an intermediary to reach the end customer; for example, hotels that use agencies to sell their products or services. New channels rely on the internet in order to connect a company with its customers. Within this group of new channels, we can also differentiate between direct and indirect channels: direct channels include purchases directly from an official website of a product or service; indirect ones include the online portals that recommend or compare products or services, social networks, online marketplaces, mobile applications, etc.

### 2.3. Fashion industry in the omnichannel context

Before making a purchase, consumers go through at least four points of contact with the brand. First, they identify the need for a product or service. Then, they search for information from a number of possible sources: the online store (24% of people access the online store before going to the physical store); the physical store; comparison websites; promotional websites; search engines. Third, they turn to public opinion; according to Elogia [7], before making any purchase, people tend to find out about it for themselves on websites where others comment. Specifically, before making a final purchase, some people visit blogs and forums to see what other customers think about the product or service they are interested. Then there is the ecommerce choice: the main factors influencing people to opt for one ecommerce company over another include special offers, trust, pre-sale facilities, economic reasons, shipping, and post-sale conditions. And finally, the post-purchase evaluation: the characteristics of the purchase that influence people's satisfaction after completing the purchase are price, usability of the website or the App, and whether the purchased product/service was as they had expected [8].

All of this influences the final purchasing decision, and companies are well aware of this. Depending on how consumers complete their purchase, we can classify them as one of three types [9]: the RTB (Research, Testing and Buying) client first searches online, then goes to the physical store to see the product and finally makes the purchase online; the ROPO (Research Online, Purchases Offline) client starts by searching for products or services online, but ends up concluding the purchase in the physical store; and the showroomer client starts by searching in physical stores, but ends up buying the product or service from the online store.

Due to the emergence of these types of customers, companies must pay careful attention to the concept of multichannel, although nowadays companies tend to seek an omnichannel approach. As indicated above, this new concept refers to the fact that it is not enough to have several channels through which to contact and build customer loyalty; these channels must be coherent and interrelated in such a way that they seem to be totally unified, with perfect synchronization between one device and another. The client should not perceive that there are several distinct channels; they must feature the same price, products, services, customer service, etc., and all follow the same strategies of integrated communication.

In this regard, we can identify different types of "tunnels" that customers go down before finally buying the product [9], an understanding of which allows greater integration of channels to facilitate and improve the consumer experience: click&collect, whereby some stores allow customers to buy the product through the online channel, but go through the offline channel to pick it up; click&store, where the purchase is made through the online channel, but buying in the physical store; using, in consequence, the online channel to reserve stock from the offline channel (i.e. customers can reserve an article of which there is no stock left in the online store but there is in the offline one); same-day service, which offers customers the possibility of receiving the product the same day they order it online at the nearest offline shop.

From the retail industry perspective, it is undergoing a transformation due to the growing digitalization of processes. One aspect of this phenomenon relates to the interface between retailers and customers. In this respect, Hagberg et al. [10] discuss the creation of new forms of exchange places or retailer-customer interfaces and the integration of existing channels. Jucevski et al. [11] put forward three necessary dimensions for a successful transition to an omnichannel business model in the retail sector: a seamless customer experience, an integrated analytics system, and an effective supply chain and logistics. In sum, firms must combine distribution channels and allocate resources efficiently to satisfy customers and maximize profits [12].

Clearly, the fashion industry advocates a future based on digitalization in which the client is the key player; in fact, about 90% of fashion companies will invest in their own digitalization [10].

To this respect, Ryu et al. [13] carried out a study focused on small fashion companies which combine offline and online channels, finding that the omnichannel strategy offers a comparative advantage over an offline channel, as clients can avoid some of the disadvantages associated with a purely online distribution channel. In this regard, clients value the opportunity for channel selection and prefer omnichannel at each stage of the process: information seeking, comparison, and purchasing. Kearney [14] conducted a survey of 2,500 shoppers in the United States, analysing which channels consumers use for each shopping phase: product discovery, purchase, payment, receipt, and return. They report that two-thirds of shoppers used both offline and online channels. Since a key goal of any company is to satisfy customers and maximize profits, efficiently allocating resources and combining existing distribution channels can be performed in parallel. Moreover, omnichannel stores can maintain customer satisfaction and corporate profits by adjusting their resource allocation to different channels as situations change [13]. Within this research field, Montoya-Weiss et al. [12] demonstrate that resources can be distributed through a combination of channels to maximize customer satisfaction and firms' profits. In the same line, Nicholson et al. [15] show the positive advantages of harnessing the complementary properties of different channels. The authors indicate that clients want to use multiple media in the purchase process and value online channel opportunities.

But companies should not only focus all their attention and interest on its customers and consumers. They must also take into account other people who may have a significant impact on the activity of the company and who are affected to some extent by the activity carried out by companies in the textile sector. We refer to stakeholders, about whom the company must be concerned and seek to create value to keep them satisfied. Stakeholders in general, and in the fashion sector in particular, comprise [3] suppliers, customers/consumers, shareholders, the public administration, and the media.

These characteristics are currently considered very important for marketers in general and for the fashion industry in particular. Their efforts are focused on satisfying the needs of this new generation, which demands mobility and immediacy.

### 2.4. The utility of the co-creation strategy as added value in the firm-customer relationship

Historically, the company was the only one that contributed value to the product, whereas customers were merely passive buyers and users. Currently, however, we can observe a changing trend, with the client and the company itself tending to jointly create value [20].

There are two main reasons underlying this new concept. On the one hand, the evolution of the concept of customer participation and, on the other, the increase in the importance acquired by the creation of value as a marketing aim. Thus, by means of this concept, the company not only tries to sell its product but to satisfy the needs of its client, with the understanding that its success depends solely on its consumers.

The concept of co-creation of value is generally defined in the literature [22, 23, 24, 25, 26, 27, 28] as the collaboration or joint contribution between two parties with the aim of generating value to obtain a common benefit. In business terms, the supplier (organization) would be the supplier of the co-creation actions geared towards the recipient (customers, users or other interested audiences) in exchange for providing a benefit of different types to the benefit, by participating in the proposed co-creation actions. The benefit obtained by the supplier is also configured on the basis of different typologies, but primarily relates to obtaining valuable information from the recipient, which can later be applied to its strategies in the process of creation or development of products and services, enabling the company to achieve better market results.

The importance of co-creation lies in the fact that the supplier makes a value proposition in relation to the creation of goods (products) or services, depending on the market needs it intends to cover. On the other hand, the recipients related to the supplier company voluntarily

participate in the proposed co-creation actions, such that both parties benefit [28]. Value co-creation processes represent an important collaboration between organizations and their clients, as equal partners in processes of mutual creation [20].

Authors such as Prahalad and Ramaswamy [22, 29], also identify co-creation as a dialogue based on interactivity, deep commitment, capacity and willingness to act of the parties involved. Other authors (e.g. [23]), argue that co-creation is a process of learning for the supplier and for the recipient, with the aim of obtaining mutual and shared value. For Vargo and Lusch [25, 26], participating in value co-creation means creating a strong value partnership between supplier and customer.

Frow et al. [21] set out 12 specific variants of co-creation relating to the interaction established between the organization and the consumer to as a form of joint participation: co-conception of ideas (identification of two or more agents collaborating in the process of innovative development, with respect to a new product or service); co-design (possibility of customization and design of products through the user's own design or co-creating client); co-production (possibility of the co-creating users playing an active and participative role in the production of the final product); co-promotion (creation of brand communities and promotion and diffusion of the product among different agents involved); co-price (development of pricing strategies developed through a collaborative agent outside the organization); co-distribution (development of distribution strategies and management of distribution channels shared between the organization and various agents); co-consumption (collaboration established during the use or consumption of the good offered, with the aim of improving the customer's consumer experience); co-maintenance (application of the maintenance service of the product once marketed, through the contribution of one or more agents involved); co-outsourcing (obtaining solutions, ideas or new perspectives on the basis of a specific objective, by agents external to the organization); co-disposition (external public or suppliers to the organization participating in the activities of production, creation or participation in the organization); co-experience (providing a purchase or consumption experience in conjunction with other stakeholders through the integration of resources applied over time during the consumption phases of the product); and finally co-creation of meaning, which is the interaction established between the organization and other actors for the joint creation of knowledge or new perspectives.

The complex process of co-creation between the organization and the participating co-creating agents is developed through various co-creation processes that allow the identification of the final goal of co-creation for the supplier organization. The process entails six steps [21]: the organization must clearly identify the reason for the co-creation in order to be able to define its objectives and the agents involved in the best possible way; the organization must define the specific form of co-creation applied; the organization selects the agents involved in the co-creation action, whether they are customers, suppliers or other external agents; the organization applies the channel through which the co-creation action will be established and the engagement relationship established with the co-creating agents; the organization identifies the levels of involvement or engagement it wishes to obtain with the proposed co-creation action, based on various identification factors, such as behavioural, cognitive or emotional factors; and, finally, the organization establishes the duration of the co-creation action, or whether it is a one-off action or may be repeated over time.

Likewise, Frow et al. [21] identify nine different reasons for establishing the co-creation actions proposed to customers: "(a) access to resources; (b) improve the customer experience; (c) create a dedication and commitment to the customer; (d) establish customer self-service linked to the co-creation actions; (e) develop more competitive strategies that can attract customer attention; (f) cost reduction; (g) accelerate the processes of configuration and development of market products; (h) identify co-creation actions as emerging strategic actions; (i) create brand recognition through the provision of co-creation actions to consumers" (p. 470–472).

Therefore, the co-creation process can only work in those cases where customers have a real connection with the brands and are motivated to make valuable contributions to the brands. As mentioned above, the development of the internet has opened up a wide range of possibilities for companies. In the same way, the evolution of information and communication technologies, as well as the changes in demand, have meant that companies have had to evolve and adapt to this environment [22].

In sum, the concept of value co-creation is hugely relevant; it shows us that "value is not only created by the company but is co-created in collaboration between the company and the consumer. Similarly, it should be noted that although in the past the place of interaction of both actors was at the end of the value chain, through this new approach it is done at any point in the system" [22].

## 2.5. Main tools to facilitate the collaboration between companies and consumers

Through the internet, mainly through social networks and forums, consumers can have access to a large amount of information, allowing them to be more connected to the company and thus putting them in a better position to evaluate the offer. These new technologies have enabled the interaction between brands and consumers, where the latter can provide ideas and business opportunities through online platforms. In this regard, the level of client participation can be so high that many clients acquire skills and knowledge at a level similar to the company's internal teams [22, 29].

It can thus be seen that the key to co-creation is knowing how to take advantage of the clients' potential as co-creators rather than mere consumers. For this reason, and to facilitate the collaboration between companies and consumers, the tools available on the internet are an essential factor in firms' success. There are a wide variety of such tools, however, we highlight the main ones here.

### 2.5.1. Social networks

Any company that wants to be competitive has to pay attention to this type of social platform, with the aim of addressing user feedback and being able to develop an atmosphere of teamwork and dialogue that can detect challenges. At the same time, it allows companies to focus their search for new markets and business opportunities, and thus innovate.

The use of these social networks is aimed at supporting the face-to-face processes through which users are expected to occupy the same physical space and share their own ideas with the company.

At the same time, companies' continued presence in social networks entails another series of benefits as, on the one hand, it can help to secure users' loyalty and gain new clients; and on the other hand, it offers tools to help develop more attractive advertising campaigns. In this case, the company must maintain a dialogue with the consumer in order to collaborate or co-create the brand. Therefore, it is not enough for the two parties to communicate, it requires the company to take actions to understand its consumer.

In this respect, we can note a wide variety of social networks that are beneficial for co-creation, such as Pinterest, Facebook, LinkedIn, Google +, Twitter, YouTube, etc. However, the first of these could be considered the main social network for the fashion sector, as it allows users to discover and share visual content by means of multimedia files, such as photographs and videos. Companies thus make use of this social network to showcase their collections.

### 2.5.2. Fashion blogs

As mentioned above, blogs are a fundamental element of the so-called Web 2.0. Thus, along with social networks, blogs have become one of the most important information formats for communication in the fashion industry. These blogs enable the free reception and management of content destined for a massive, heterogeneous audience [30].

Through these platforms, fashion companies can disseminate their trends and styles, publicizing the products of fashion brands and encouraging online shopping. Similarly, they play a role in the process of co-creation, as they allow companies to immediately get a sense of consumers' tastes and act accordingly in decision-making. In this way, so-called corporate blogs can be created, which are created by the companies themselves to disseminate information about the products they market and their activities, with the additional aim of hearing their consumers' opinions [31].

2.5.3. Corporate websites

Corporate websites provide companies with an e-commerce presence and facilitate the promotion of the products and services they market. These websites can even be thought of as the company's letter of introduction.

However, they entail serious limitations in terms of the company's interaction with customers to encourage co-creation. At present, very few websites allow users to add content themselves and make comments to participate in the value creation process [31].

2.5.4. Apps

Apps are software applications installed on smart phones or tablets with the aim of helping the user to perform a specific task. Many brands and companies have adapted to this new environment and have created their own application, through which they publicize their products and respond to the tastes and opinions of their consumers. To date, the web continues to predominate over apps, however, bearing in mind that about 66% of internet users have mobile devices, the use of these applications is likely to increase [33].

Within the world of fashion Apps, particularly notable examples include Style App, WGSN, Chicismo, Cloth App, Zalando, etc.

3. Methodology of research

3.1. Qualitative approach

After the literature review, a theoretical basic network is proposed (see Figure 1), in order to answer the following qualitative research questions, divided into two distinct blocks.

In the first block, giving that omnichannel refers to the customer perceiving a homogeneous shopping experience [5], we think it is necessary to analyse it in the Spanish fashion and accessories industry. We set the first research question: Is omnichannel a means of

homogenizing the company's experience? We consider that omnichannel is a unique experience, uses a single strategy and puts the customer at the centre.

On the other hand, digitalization in the fashion retail sector is increasingly important Hagberg et al. [10]. In line with this, some authors (e.g. Kearney [14]; Moes and van Vliet [1]; Montoya-Weiss et al. [12]; Nicholson et al. [15]; Ryu et al. [13]) analyze the advantages and disadvantages of using integrate both channels (i.e. omnichannel). So, the second block raises the following research question: What is the role of digital media in omnichannel? In this case, we differentiate five variables.

The first of all, social networking: allows a direct contact between company and consumer; enable an immediate response; encourage consumer participation; encourages consumer feedback; and allow an immediate response to consumer feedback.

The second, market knowledge: customer feedback provides consumer information; consumer information facilitates personalization; and consumer participation fosters the collection of information.

The third, product customization and personalization: personalization generates satisfaction with the product; personalization helps generate engagement with the company; customization favours brand specification; and personalization generates value for the consumer.

A sense of ownership of the brand contributes to the consumer's participation and it fosters engagement with the company.

Finally, consumer participation: leads to co-creation of value; generates engagement with the company; creates value for the consumer; creates value for the company; the resulting engagement with the company creates value for the consumer; and the resulting engagement with clients creates value for the company.

3.2. Materials and methods

Sample selection was performed using a quota structure based on characteristics such as geographical location and product type (clothing, footwear, accessories, or children's wear); in addition, all selected companies had to sell online, and use internationalization strategies. These quotas were established using a study of "Mobile commerce in the fashion sector" conducted by Corpora 360 [34] and the report on "Omni-Channel Retailing in Spain", conducted by the Interactive Advertising Bureau [35]. Thus, the distribution is as follows: ten interviews in clothing; five in footwear; three in accessories, and two in children's wear. This distribution was established following the report by Corpora 360 [34], which found that 90% of the fashion industry in Spain

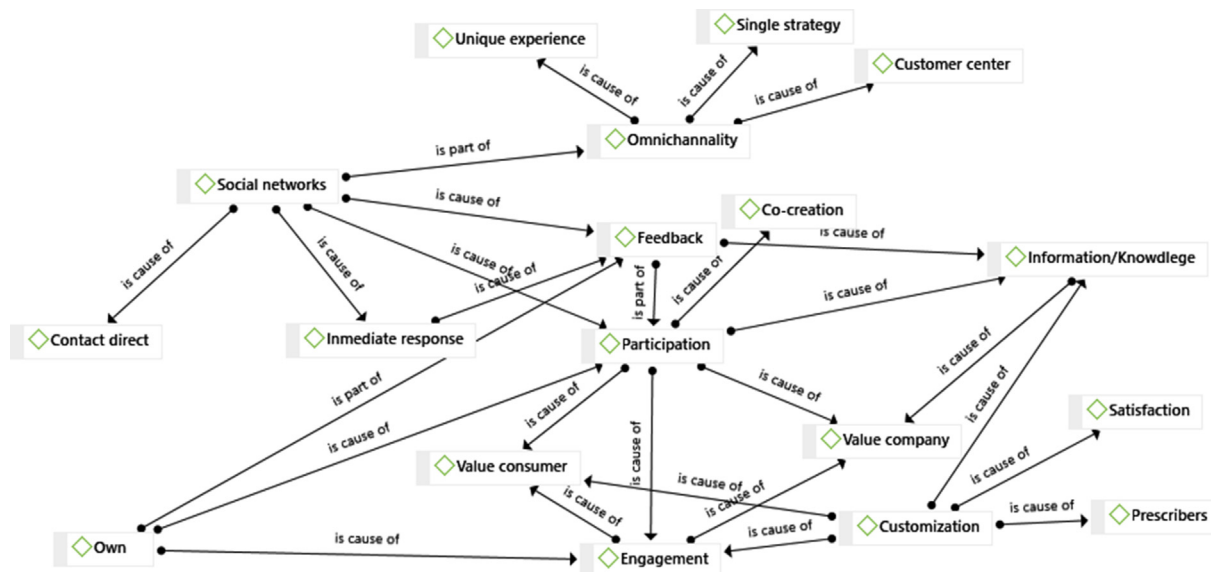


Figure 1. Theoretical basic network.

had online sales, and reported the following distribution: 47% clothing, 25% footwear, 17% accessories, and 11% children's wear.

A qualitative analysis has been carried out consisting of twenty in-depth interviews with the people responsible for digital marketing departments and responsible for international departments in Spanish fashion companies or, if that was not possible, with people capable of providing us with answers to our questions, such as founding partners of Spanish start-ups in the fashion and accessories sector or sector experts. They all interviewed each other until they got the saturation of the speech. The interviews were done through a company specialized in conducting in-depth interviews and they were carried out from March 10, 2016 to July 21, 2016. This type of study is consistent with other qualitative works in which managers of different sectors (such as fashion) are interviewed to discover their digital strategies in the omnichannel context (e.g. [11]).

The sample includes companies belonging to the Textile, Footwear, and Accessories categories in different Autonomous Communities (Madrid, Catalonia, Valencian Community and Castilla-La Mancha). In some cases, the companies belonged to a single category (Footwear, Textiles, or Accessories) and in other cases, particularly large companies, they represent several categories.

Most of them are manufacturer brands, although we also include a distributor brand, some of them with their own stores, and others that they sell through distributors.

In addition, it was considered appropriate to include the perspective of sector experts (ES). To that end, three personal interviews were carried out with them.

As for the analysis of the qualitative information obtained from the interviews carried out in this study, the *Atlas.ti*® computer software was used. To this end, inductive and deductive coding of the interviews has been carried out, following the coding strategies proposed by Miles et al. [36]. In line with this, we have codified the interviews using 18 codes (Appendix 1). Then we applied the most commonly-used analysis tools to analyse the information: namely, the query tool to determine the frequency of each code (Appendix 1), and the co-occurrence table to analyse the strength of the relationship between the codes (Appendix 2).

#### 4. Results and discussion

The results obtained in this work (see Appendixes 1 and 2), in order to respond to the research questions raised above, are classified into two blocks:

- First, the interviewees view omnichannel as a means of homogenizing the consumer experience.
- Second, the role of digital media in omnichannel is addressed.

In order to address both blocks, reference is made to some key elements - or labels - within this field, such as social networks, market knowledge, product personalization or customization, a sense of ownership of the brand and, finally, consumer participation.

Based on the basic theoretical framework extracted from the qualitative study (see Figure 1), the analyses carried out using the *Atlas.ti*® software of the 20 interviews conducted yielded the results shown in a final model in Figure 2. This figure centres on two parameters: the value "E" (G: groundness) which refers to the number of times a code has been quoted, and on the other hand, the value "D" (density) which reflects the number of times two codes are related. It can be noted that the codes with the most quotes (G) are social networks (179), participation (115) and personalization (78).

The main results show that social networks play a key role in consumer participation generating value both for consumers (e.g. engagement) and companies (e.g. information, engagement, among others). On the other hand, the role of personalization in participation should be highlighted, as it implies benefits such as greater satisfaction with the product.

Next, from the data obtained in the final model shown in Figure 2, each of the elements most often cited by the interviewees in each of the blocks treated in the qualitative study will be explained in depth. This can provide an answer to the research questions raised in section 3.

##### 4.1. Omnichannel as a means of homogenizing experience

The channels of contact with the customer have multiplied with the digital development: online stores, social networks, chatrooms, etc., which are accessed through fixed and mobile devices. All of these points of contact combine with the physical contact points: the shops.

Until now, there has been a certain duality between online and offline channels, with the two channels operating separately. This has made it difficult for the customer to have a single buying experience, and for the channels to act in a coordinated and synergistic manner in making the sale. The perception of this shortcoming, and the potential represented by the integration of the channels, has led to the emergence of the concept of omnichannel, which currently represents one of the main areas of work of companies in the sector. Thus, one of the experts interviewed states that: "in the past, you had your physical store, your online

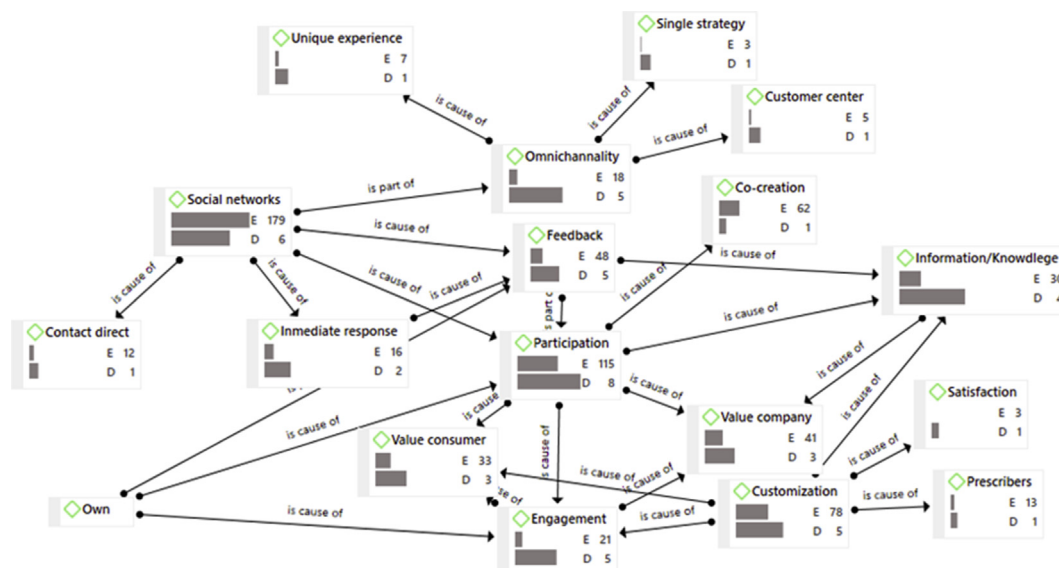


Figure 2. Model resulting from the theoretical basic network extracted from the qualitative study.

store, and there started to be a kind of struggle between what was sold in the online store and in the physical store; they were like two separate areas, it seemed that there was a kind of struggle. And in the end, you see that they are not an individual store and that they both have to interrelate." In line with this opinion, one of the experts in large textile brands argues: "you have to stop talking about "an online client" or an "offline client"; it's the same client, it's a circle that has no end in that sense. In the end, it's the same client who accesses by different points, but you can't make that mental division like before."

Omnichannel proposes the integration of the channels to work for the customer as a single channel, as a means to offer the customer greater accessibility: the same purchase can start in one channel and end in another, or a return of an online purchase can be done in a physical store, etc. The idea is to encourage the customer to experience the brand, not the channels, which must be made invisible to the eyes of the consumer.

Along these lines, an expert in major footwear brands points out: "I believe that, as far as the interaction with the consumer is concerned, my bet is on omnichannel. The trend is going to be to fully link the online and offline strategy, so that from the store you can buy on the web, from the web you can collect in the store, cross sales, everything is closely linked in strategy, in everything".

Omnichannel also represents an ability to produce a synergistic effect for the sale; thus, for example, it becomes possible to use the stock of the online store in a sale in a physical store, as the situation requires, or to make an online purchase and pick it up in physical store. These are actions that increase sales and offer value to the customer, within a concept of a commercial relationship in which the customer takes centre stage. Therefore, according to the opinion of the interviewed distributor: "the omnichannel strategies ultimately assume that the client is at the centre of everything and can participate and communicate with your brand on any occasion and through different channels".

Today omnichannel is a major trend, as one of the experts in large textile brands points out: "Another of the key trends today is omnichannel. The consumer has several access points with your brand: it can be a store, a social network, it can be an email, it can be customer service, the physical store, but the experience has to be exactly the same".

The analyses performed (Appendix 2) reveal three citations in which omnichannel is related to the client being the centre, in 2 of the 20 interviews. On the other hand, in 1 of the 20 interviews omnichannel and unique strategy are related. Finally, the codes for omnichannel and unique experience are related in 2 of the 20 interviews.

#### 4.2. The role of digital media in omnichannel

Digital media and offline channels have to work together in a coordinated way. Within digital media, the major digital transformation at the moment is in the field of social networks. As one of the major brands in textiles points out "the level of demand for brands is brutal, which is why digital transformation is important not at the level of sales but of social networks". In addition, according to the opinion of one of the medium-sized brands in textiles "right now, whether or not you have to be on social networks is not even in question; it is a reality. You don't even have to think about what it brings you, it is fundamental, because communication as we understood it 10 years ago has taken a 360-degree turn and all brands have to be on social networks".

Initially, the adoption of social networks was motivated by the broad scope it offers in terms of contacting and reaching out to the consumer, at a relatively low cost. In this sense, one of the medium-sized brands in textiles claims "I believe that companies' main motivation is that it is a medium that reaches many people, it has a much greater reach than traditional media, ... price and closeness and reach were the main motivations that made our brand enter social networks, and not only social networks but also digital communication, which are many supports".

##### 4.2.1. Social networks

Digital media facilitate direct, immediate contact, in part because the brand has this type of media at its instant disposal. In the classic model

based on traditional mass-media, the brand did not have such instantaneous availability; in the case of digital media, specifically social networks, the brand has greater room for manoeuvre and a greater capacity for programming and immediate reaction. In the opinion of one of the medium-sized textile companies interviewed, "it is much more immediate than planning a TV commercial; you can simply organize and plan your programming on social networks".

The consumer shortens the path to the brand through social networks: whereas contact previously occurred through stores or other means of contact such as customer service, it now occurs directly through networks. The brands know that being in direct contact with their consumers means that their response is exposed, and therefore their reputation comes into play. This can represent a greater pressure to provide a faster, more immediate response. In this sense, one of the major brands in textiles states "direct communication between the user and the brand has meant that intermediaries are entirely eliminated. So, in the end, when they have a doubt, instead of having to go to a store or send a letter or an email to customer service or call the phone, they post it directly on Facebook".

The qualitative analyses carried out with Atlas.ti® reveal 2 citations have been obtained in which the codes social networks and omnichannel are related (Appendix 2), in 2 of the 20 interviews.

##### 4.2.2. Market knowledge

One of the main values associated with social networks lies in their ability to provide information on consumer response: the measurement of response to consumer feedback in real time (quantitative data), and valuable information through feedback (qualitative data). In other words, according to a medium-sized textile company "online marketing has many advantages: segmentation, measuring the results of everything you do, having a continuous feedback that other traditional means do not have". After analysing the results, it is observed that the interviewees cite the relationship between feedback and consumer information 9 times (Appendix 2), in 7 of the 20 interviews.

On the other hand, consumer information is a key resource for personalization. This source of information, among others, allows the segmentation of the market, which constitutes one of the most notable tools of social networks. Thus, one of the medium-sized textile brand companies states that "you can send out highly segmented communications, to whomever you want to reach". Regarding the citations in which consumer information is related to personalization, 2 citations have been obtained (Appendix 2), in 2 of the 20 interviews.

Finally, it should be noted that consumer participation produces invaluable market information for the company, allowing it to take more appropriate actions, tailored to each market. As stated by the distributors, consumer participation "tells us about what these people want, whether they like the brand, whether they like the proposal, or if they don't like it. I'm referring to Big Data, and right now this direct participation is as valid as indirect participation, and thanks to the sum of all that content and our continuous analysis of that participation, what we are doing is creating specific collections for those people based on what they like and what they demand from us ... Right now we are creating collections and we are proposing services based on 100% of what consumers are asking from us, and we know that thanks to our participation in digital channels".

The analyses performed identified 17 citations in which participation and information codes are related (Appendix 2), in a total of 7 of the 20 interviews.

##### 4.2.3. Product customization and personalization

The spaces for personalization/customization of products produce notable effects in terms of creating value for brands. In this respect, it is worth emphasizing the higher levels of satisfaction with the product, which are reflected in the lower rates of return of this type of product as opposed to the standardized ones. as one of the big brands of footwear affirms "returns do not even reach 3% of everything that we are serving, ...,

as for results, there are practically no returns, I understand that the satisfaction is complete at the time of buying our product". After analyzing the results, two citations are identified in which personalization/customization and satisfaction are related (Appendix 2), in 2 of the 20 interviews.

Another important aspect is that personalization/customization is considered an exceptional way of developing the link, or engagement, between the consumer and the company, and building greater brand loyalty. According to the opinion of representative from a major brand of footwear "I can tell you that customization increases loyalty, because in the end, the feeling of wearing something exclusive, tailored to your requests will make you have a much greater bond. On the other hand, consumers become more involved in the diffusion and specification of the product: the consumer comments on and presents the product in his/her environment, and so in a certain way the product carries his/her seal of approval. Thus, one of the experts interviewed states" "There are people who can identify more or less with a brand, there are people who are loyal to fashion who identify fully with the ideas of the philosophy of that brand, if you also let them participate a little, you're giving a lot of value to that person and these are the real product specifiers, .... ". Regarding the analysis carried out, personalization was cited in relation to engagement two times, and personalization in relation to specifiers two times (Appendix 2), in 2 of the 20 interviews.

The personalization/customization of the product represents a high experiential value for the consumer and a space with a significant demand. In this sense, the participation of the user in the personalization/customization of the product represents a co-creative process in production. This is an activity that depends the creative role of the "webactor" and a type of individualized product according that depends on the look pursued by fashion. In short, it is an activity that represents the confluence of the different theoretical approaches applied in this article, and a contribution of value for the client that coincides with them. According to the analyses carried out, personalization was cited in relation to value creation for the consumer (Appendix 2), in 3 of the 20 interviews.

In the opinion of the companies interviewed, the consideration of personalization/customization represents an interesting option for the sector, although due to the higher costs and thus higher prices involved, it has not been widely developed. However, we must not lose sight of the fact that the personalization of experience, service, offer, etc., represents an interesting competitive space due to its current differential nature, and that personalization/customization is a source of value, at least for some consumer profiles.

#### 4.2.4. A sense of ownership of the brand

Social networks have come to represent not only a space for communication, but also a space for relationships, where brands seek the involvement of the customer, to make them participants in the brand. In this way, the brand goes from representing a space of reference to representing a space of belonging, in which the brand is no longer perceived as something foreign (the Institutional), but in a certain way something that belongs to the consumer (the Social). Thus, at least symbolically, the participation of the consumer in the design of the product represents an appropriation of it: the product is no longer something foreign; rather the consumer becomes an agent in its creation, and thus perceives the product as a part of him/herself.

This fact is connected a broader trend, wherein brands' approach to the social space and to the consumer seeks to create a brand space that in some way allows the consumer to feel a sense of ownership of the brand. In turn, this helps develop closer ties between the consumer and the brand (*engagement*).

As a result of the analyses performed, it was revealed that the code for a sense of ownership of the brand was cited in relation to consumer participation (Appendix 2) in a total of 2 of the 20 interviews. Similarly, the code for a sense of ownership of the brand was cited together with engagement in 1 of the 20 interviews (Appendix 2).

#### 4.2.5. Consumer participation

The brands' social websites become platforms for the co-creation of experiential value for the client through the brand's proposal of consumer participation spaces. In these spaces, the client becomes the protagonist. The analyses carried out identify 32 times that participation was cited in relation to co-creation (Appendix 2), in 11 of the 20 interviews.

The active participation of the consumer represents two fundamental values for companies: information about the consumer and about the acceptance of the brand's proposals; and the connection, the engagement of the public with the brand through the relationships that are generated, all made possible by the creation of an active community. In this sense, the predominant approach is the relational one. However, the relational also implies an experiential side, the value of the relational experience for the consumer, a consumer who participates through his or her comments, who is recognized and thanked for his or her participation, who generates emotional bonds through interaction, dialogue, etc. Thus, the analysis finds (Appendix 2) 10 times that the codes for participation and engagement are cited in relation to one another, in 9 of the 20 interviews; and 17 times that the codes for participation and information are cited in relation to one another, in 7 of the 20 interviews.

For this reason, the value of networks does not depend on the number of followers, but on the active participation of the consumers, the level of interaction, and the relationship established, since this is where the value for the brand (information and engagement) and for the consumer is produced. The analyses carried out indicate that the codes for participation and value for the consumer are cited in relation to one another 20 times (Appendix 2), in a total of 10 of the 20 interviews; and the codes for participation and value for the company are cited in relation to one another 21 times (Appendix 2), in a total of 11 of the 20 interviews.

The relationship generated between company and consumer through the web makes multiple contributions: the value of being a brand that is open to participation; the feeling of being part of the brand; the relational and emotional value that is generated; and aspects that refer to the concept of engagement as the creation of a solid and permanent nexus between brand and consumer, a nexus that generates connection, commitment, advocacy, and loyalty to the brand. Everything starts from giving the consumer a relevant role within the brand, making him/her "feel unique", "special", and "listened to". Placing the customer at the centre in this way will bring with it the development of an emotional bond, with the abovementioned advantages that entails. Thus, according to the analyses carried out, the codes for engagement and generation of value for the consumer were cited in relation to one another one time in one interview, as was also the case with the codes for engagement that customers acquire and value for the company (Appendix 2).

## 5. Conclusions

Digital development has contributed to direct and immediate contact between the brand and the consumer (especially through social networks), as well as omnichannel characterized by the consumer's a single buying experience. In this sense, the fact that the client does not perceive that online and offline channels are two separate channels, as well as the consideration that it is the same client (i.e. there is no difference between online and offline clients) and also the client is the center of all things, in the opinion of the fashion companies and some experts interviewed, represents a change in the fashion industry assuming a key trend. These results are in line with Moes and van Vliet [1], the most widely-adopted strategy responds to a omnichannel approach, whereby brands develop their digital presence on different social networks. In this sense, the fashion industry advocates a future based on digitalization [16], where digital media, and especially social networks, enable a new type of direct contact between the brand and the consumer, a contact that was previously mediated by commercial intermediaries: distributors, shops, etc.

The value of networks does not depend on the number of followers, but rather on the active participation of the consumer, the level of interaction, and the relationship established, since that is where the value



for the company (information and engagement) and for the consumer is produced. Therefore, value is created jointly between companies and consumers [20].

In addition, the results show that social networks acquire great importance since, according to one of the companies interviewed, “the level of demand for brands is brutal”. The communication has changed, and companies must be present on social networks to respond to this trend that allows reaching many consumers and at a low cost. Another advantage of social networks is feedback, the information it generates. This direct information comes without the biases caused by the subjectivity of the intermediary and can be obtained almost in real time, which represents a significant change. This result is in line with other studies [22].

This situation will have important consequences for the action of the brand, since it will be possible not only to evaluate the result in a short time frame, but also to redirect if necessary. Thus, the action of the brand is part of an iterative process, the outcome of which is more appropriate to the consumer and, therefore, of greater value to him/her. On the other hand, the contact from the consumer to the brand occurs in a direct way, and this prompts a more immediate response, which obviously brings value to the customer.

The fashion industry does not seem to be removed from this process. While product proposals through the collections used to be governed by the seasons, we are witnessing a proliferation of collections throughout the year (“fast fashion”). The proposal of the collections thus becomes more immediate, which is made possible by the production systems that are capable of producing more and more in shorter periods. On the other hand, it is worth highlighting co-design (i.e. customization), which is one of the variants of co-creation according to Frow et al. [21]. Co-design reaches its maximum expression in the practice of some companies in offering products that are “made to measure” or “co-created/customized”. Although this activity represents a minority in the sector, and it is difficult to extrapolate from as it concerns products with a high symbolic and economic value (e.g. bridal gowns), it suggests the emergence of a new brand space that considers and integrates the expression and individual criteria of each consumer. The trend in brand proposals indicates the path to individuality, first through a progressive segmentation that brings together consumers with similar profiles, and eventually achieving a completely personalized offer (in communications, products, etc.). Thus, the next digital step will come from personalized websites that ensure consumers receive the most personally relevant proposals from the brands. Along the path of personalization, not only is the offer personalized but also the experience, giving rise to new competitive possibilities compared to standardized formats of customer relationship. Moreover, digital technology plays a prominent role in this process, as a means of developing fully individualized proposals to increase consumer satisfaction, as well as to increase bonding and engagement, and foster greater brand loyalty. All this definitively leads to a new paradigm, which represents the transition from a model based on proposing collective solutions, proposals and responses, to a business model that increasingly develops individual proposals, solutions and responses.

From the point of view of theoretical implications, this study contributes in the theory of the omnichannel strategy in the Spanish fashion and accessories industry, since there are few studies that quantitatively analyse the omnichannel in the retail sector [37], but there are no studies that analyze it qualitatively. Therefore, the results that emerge from this work are key because by analyzing omnichannel from a qualitative point of view, this study brings a subjective approach to the phenomenon of omnichannel. In this sense, this study allows help the companies to best develop their consumers' omnichannel experience and so better understand the attitudes and behaviors of consumers such as personal participation, satisfaction and engagement with the firm. For this reason, it is a relevant and current issue.

Regarding to the managerial implications, omnichannel is interesting for companies and consumers. In the case of the companies, the omnichannel strategy suppose increase sales, and add value to the client, within a concept of business relationship in which the client comes to

occupy the central place. It all starts from giving the consumer relevance within the brand, “that feels unique”, “special”, listening and caring for it, placing it at the center, which will bring about the development of an emotional bond, and from here different contributions: prescription, loyalty, etc. Therefore, in this relationship it is important that companies take into account to keep in mind that the client is not passive, but wants to participate with the company, in other words co-create together with the company. For it, the approach of the brand, in which it enables means of connection with the consumer, interaction, dialogue, in which the way of communicating becomes less impersonal, in which the participation of the brand is recognized, valued and encouraged consumer, in which content of value for the consumer is proposed, in which a relationship beyond the purely transactional is sought, favors the active participation of the public, establishing a space of relationship. One of the ways that companies can promote active consumer participation is develop their digital presence on different social networks. On the other hand, in the case of the consumer, the omnichannel offers the consumer greater accessibility (e.g. the purchase can be made with one channel and end in another). It is about encouraging the client to experience the brand. In this sense, the study reveals that the customer has a homogeneous shopping experience. Moreover, omnichannel improves the shopping experience [6] and supposes advantages for companies and consumers in line with previous studies [12, 13, 14, 15].

On the other hand, in relation with the second research question, Blasco [38] noted that the use of Internet and the development of web 2.0 have contributed to the use of social networks such as Facebook. So that, in the world of fashion, new technologies and the use of social networks are key elements for co-creation, personalized mass co-production and the co-design processes of specific products and services, resulting in new fashion thinking that directs a collective approach through platforms and social networks [39]. In this sense, the results show the key role of digital media in omnichannel.

The main limitations of this study relate to the development and implementation of the field work. In terms of generating a representative panel with companies in the sector from different parts of the Iberian Peninsula and, specifically, contacting the head of the digital marketing department, the response rate was lower than desired. However, despite the small sample obtained, this study represents an initial exploratory approximation, which provides an answer to the research questions raised at the outset. Another limitation is that this work focuses on a qualitative approach, for it we would also recommend for future research that using a qualitative approach is not enough, so it is recommended to also use a quantitative approach to complement the information and confirm the results.

As future lines of research, it should be pointed out that the market information system that generates active participation in social networks makes it possible to collect qualitative information, linked to user comments and discussion dynamics between users, as well as notable quantitative information related to the number of views, likes, number of times a post is shared, etc. Such information can be used with a tool capable of handling classic marketing variables, such as the AIDA model.

## Declarations

### Author contribution statement

Carlota Lorenzo Romero, María-Encarnación Andrés-Martínez, Juan-Antonio Mondéjar-Jiménez: Conceived and designed the experiments; Performed the experiments; Analyzed and interpreted the data; Contributed reagents, materials, analysis tools or data; Wrote the paper.

### Funding statement

This research did not receive any specific grant from funding agencies in the public, commercial, or not-for-profit sectors.

### Competing interest statement

The authors declare no conflict of interest.

### Additional information

Supplementary content related to this article has been published online at <https://doi.org/10.1016/j.heliyon.2020.e04198>.

### Acknowledgements

This study is part of the national research project of the Ramón Areces Foundation, entitled “Open collaboration on the Internet as strategy for innovation and internationalization of the fashion and accessories industry” (2015–2018), Spain.

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