Determination of Success Factors of the Shop-in-Shop and the Concession Model in the Fashion Industry: An Empirical Analysis of Consumer Perception in the Case of an European Fashion Company in Spain

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Abstract: In the fierce competitive environment of the fashion industry, characterized by increasingly shorter product-life-cycles, growing expectations of informed consumers and an intensifying pressure from cheap products, consumer proximity, a strong brand presentation and a short time to market, are decisive elements for manufacturers. Due to market concentration of large-scale retail chains and a shift in power within the distribution channel from manufacturers towards retailers, new vertical marketing concepts emerged which allow to increasingly control the retail channel. Especially the specific success factors of the Shop-in-Shop Concept (SiSC) and the Concession Model (CM) are under focussed discussion. This paper aims to explore the consumers' perception of the CM compared to the SiSC in retailing.

The research question here is:

Do consumers perceive the potential benefits of the CM compared to the SiSC in fashion retailing?

In these premises an exploratory study was undertaken.

By means of grounded research a framework was developed and the success factors of both concepts regarding Instore Marketing, Merchandise and Personal selling were determined. Based on these findings hypotheses were put forward and tested by means of primary data (consumer survey) gathered in selected sales areas of an European fashion company, managed by means of the two retail models (CM and SiSC) in department stores of a Spanish retail chain in Spain.

Key words: retail system; concession model; shop-in-shop; success factors

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1. Introduction

Until now, research has mainly concentrated upon the analysis of efficiency enhancement (Bundesverband des Deutschen Textileinzelhandels, 2010, p. 13; Brettel M., Engelen A., Müller T., 2011, p. 41), the relationship between manufacturer and retailer (Vinhas A. S., Anderson E., 2005, p. 507) or the effects on pricing and sales (Li J., Chan T., Lewis M., 2012, p. 1). Although the impact on consumers represents the decisive factor for success,

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there is a surprisingly lack of study regarding the consumer's perception of vertical- and especially the Concession model (CM). It is to investigate if consumers perceive advantages of the CM (manufacturer rents selling area from retailer and manages it independently) compared to retail models with which, the retailer manages the sales area as for instance the Shop-in-Shop Concept (SiSC).

2. Background

Within the last decade there has been a steady increase in the establishment of vertical retail concepts in the German fashion industry (Ahlert D., Große-Bölting K., Heinemann G., 2007, p. 95; Bundesverband des Deutschen Textileinzelhandels, 2010, p. 27) as well as internationally, such as in Asia and the US (Li J., Chan T., Lewis M., 2012, p. 2; Jerath K., Zhang Z. J., 2010, p. 748; O'Connell V., Dodes R., 2009; http://online.wsj.com). The proliferation of sales areas managed by means of the CM is expected to strongly continue (Reinhold K., Probe A., 2011, p. 39). Tasks and functions between retailer and manufacturer are shifting especially in the consumer goods sector (Zentes J., Pocsay S., 2010, p.13; Zentes J., Bastian J., 2010, p. 975; Hertel J., Zentes J., Schramm-Klein H., 2011, p. 6). According to Zentes: "The distinction between manufacturers and retailers blurs, and the characteristics of institutions at both stages in the value chain actually converge" (Zentes J., Morschett D., Schramm-Klein H., 2011, p. 15).

With an increasing extent of forward integration, and hence assumption of retail functions, by manufacturers, different sales models can be differentiated. Starting from Shop-in-Shop via Concessions up to Directly Operated (own) Stores (DOS).

The SiSC (Berekoven L., 1995, p. 305; Byszio U., 1996, p. 11; Falk U., 1982, p. 699; Medla K., 1987, p. 85; Tietz B., 1983, p. 683; Weinberg P., 1992, p. 147) is based on a contract between manufacturer and retailer. The integral part of the contract is the spatial and visual separation of the manufacturer's assortment. Mainly by means of corporate designed shop fitting that has to be bought by the retailer. As a consequence, a separated sales area of one certain brand emerges within the store of the retailer. The employment of sales personnel, the management of merchandise e.g. assortment planning, procurement and pricing belongs to the area of responsibility of the retailer who also bears the merchandise risk (Zentes J., Morschett D., Schramm-Klein H., 2011, p. 101; Meffert H., Burmann C., Kirchgeorg M., 2012, p. 555; Bundesverband des Deutschen Textileinzelhandels, 2010, p. 18). Hence, with a SiSC the retailer continues to exert the retail functions, and is solely supported with the shop fitting.

The CM is also based on a contractual agreement between manufacturer and retailer. In this case, the manufacturer (= concessionaire) *rents a selling area* from a retailer and manages it on its own. As with the SiSC, the Concession area is a separated space that stands out by the shop fitting, designed by the manufacturer. The manufacturer is responsible for merchandise, and sells the products for its own account. Consequently, he bears the full merchandise risk. Furthermore, the manufacturer employs the sales personnel and designs its marketing activities. Besides the rent the retailer receives a turnover-related remuneration (concession fee) (Zentes J., Morschett D., Schramm-Klein H., 2011, p. 93; Meffert H., Burmann C., Kirchgeorg M., 2012, p. 555; Committee for Definitions of Terms in Trade and Distribution, 2009, p. 60).

By forward integration of clothing industry, the traditional value chain of manufacturer and retailer do not add, but merge. A vertical loop arises. This vertical loop allows a constant exchange along the value chain, whereas the traditional role allocation is characterized by a strict division of work between manufacturer, and retailer (Bundesverband des Deutschen Textileinzelhandels, 2010, p. 7; Loock H., 2008, p. 51).

By means of this loop, a constant feedback from the POS and therefore an adjustment of offer more closely to market and consumer needs shall be allowed. Important factors seem to be the optimal controllability of the POS as well as motivated sales personnel for the own model. This intends to resolve the conflict of diverging interests between manufacturer and retailer. A consistent brand appearance is realized, which enables to build brand consciousness, and brand loyalty (Zentes J., Neidhart M., 2005, p. 284; Bundesverband des Deutschen Textileinzelhandels, 2010, p. 44).

With a growing extent of vertical integration, there is an increase in the opportunity of implementing a vertically integrated value chain and therefore, to realize its potential superior effects.

2.1 Development of a Theoretical Frame

Since with an increasing extent of vertical integration (SiSC→ Franchise → CM→ DOS) there is an increasing implementation of a vertically integrated value chain and therefore a progressive realization of its potential benefits, the CM should fulfil consumer needs better than the SiSC (Bundesverband des Deutschen Textileinzelhandels, 2010, p. 7).

Since the objective of this work is to examine the consumer's perception regarding both models solely the key drivers (Bundesverband des Deutschen Einzelhandels, 2010, p. 6) whose effects can be *perceived by the consumer at the POS,* can be investigated. As is not to assume that consumers perceive *financial, process-related or company-internal cultural aspects,* the drivers under investigation are

- Adjustment of offer to POS
- Control of sales
- Establishment of brand profile

In order to investigate whether these drivers allow a better adjustment to consumers' needs, with an increasing extent of vertical integration, they have to be specified into factors that influence success with consumers. The retail functions can be used as criteria on the basis of which the two concepts may be compared. In essence, they also represent the operationalization of the above mentioned key success drivers.

From the multitude of retail functions, *three consumer-perceivable categories* (Instore Marketing, Merchandise, Personal selling) will be derived on the basis of which the two concepts can be compared. Medla specifically stresses that the design of these factors have an impact on consumers (Medla K., 1987, p. 162; Theis H. J., 2007, p. 32).

2.2 Opposing Strategies of Manufacturer and Retailer

While retailers aim to profile their business, and hence the retail outlet as a whole in the consumer's mind in order to differentiate their venture from competitive retailers (Benkenstein M., Bastain A., 1997, p. 210), manufacturers target to promote their brand and its products (Zentes J.,Swoboda B., 2001, p. 892; Barth K., Hartmann M., Schröder H., 2007, p. 222; Tietz B., 1993a; 1993b).

Especially the effort of retailers to establish own brands (private labels), to position them separated from manufacturers of branded goods, demonstrate the retailer's objective to follow an independent strategy. Consequently, retailers are not willing to meet the guidelines, especially regarding assortment and product presentation imposed by manufacturers (Handels Monitor, 1997, p. 29; Ahlert D., 1994, p. 292).

As a consequence of the diverging interests, different marketing concepts of retailers and manufacturers emerged (Theis H. J., 2007, p. 95).

These divergent approaches towards marketing are reflected in the management of sales areas, based on the SiSC and the CM. This can especially be noticed in the three areas of: Instore Marketing, Merchandise, Personal

Selling (Meffert H., Burmann C., Kirchgeorg M., 2012, p. 555; Zentes J., Morschett D., Schramm-Klein H., 2011, p. 15; Zentes J., Swoboda B., 2001, p. 891; Zentes J., Hurth J., 1996).

2.3 Approach

In an exploratory approach based on a detailed examination of literature and plausibility considerations, success factors of the SiSC and the CM within the three categories were determined (Lange B., 1982, p. 31; Hurth, J., 1998, p. 48).

In appendix 1 the success factors of the two retail concepts regarding the three mentioned areas are illustrated.

3. Hypotheses

Following the derived categories of success factor determination (see appendix 1) hypotheses regarding *instore marketing, merchandise* and *sales personnel* will be put forward. Furthermore, a superordinated hypothesis that refers to the global impression of consumers regarding the two retail concepts will be developed.

3.1 Hypotheses on Instore Marketing

H_1: The Concession model is more capable of establishing a holistic brand identity with the consumer than the SiSC.

3.2 Hypotheses on Merchandise

H_{2-1}: The consumer perceives the assortment in a sales area managed by the CM, as more appealing as compared with the SiSC.

H_{2-2}: The CM optimizes the supply and the replenishment of products.

3.3 Hypotheses on Personal Selling

H_{3-1}: The CM is more capable of providing the consumer sales consultancy at each visit than the SiSC.

H_{3-2}: The consumer perceives the sales personnel of the CM as more competent as compared to the SiSC.

3.4 Superordinated Hypothesis

Since the present research ultimately aims to conduct an overall assessment of the CM versus the SiSCit appears to be appropriate to develop a superordinated hypothesis that refers to the overall performance (including all three categories) of the CM.

Hence, the following hypothesis is put forth:

H_4: A sales area managed by the CM, is more attractive to consumers than a sales area based on the SiSC.

4. Methodology

The empirical verification of the hypotheses that have been put forward, has been executed based on primary data collected by means of a consumer survey in the sales areas of an European fashion company that are managed by the SiSC and the CM (two independent samples), within department stores one particular Spanish retail chain in Spain.

For data collection, two sales areas managed by means of the CM and two sales floors under the responsibility of the retailer (SiSC) were selected as a location for data collection. The test persons were asked to indicate their attitude on a 5-point likert-scale(strongly agree-agree-undecided-disagree-strongly disagree; for the controversial discussion regarding the application of a likert-scale in an intercultural context (Yu J. H., Keown C. H., Jacobs L.,1992).

Every consumer that entered the particular sales area of the European fashion company during the survey period was asked to complete the questionnaire. In total 20 consumers were questioned in the sales areas of the SiSC and equally on sales floors of the CM (*n = 20 per sample*).

4.1 Evaluation Method

Since the objective of this work is to investigate whether consumers perceive benefits of the CM compared to the SiSC, the empirical research targets to detect and analyse differences in the consumers' perception regarding both models.

As an appropriate statistical tool to compare the two independent groups, and to test if the two groups differ significantly, the t-test for "unpaired" or "independent" samples (Student's *t*-test) was applied (Burns R. B., Burns R. A., 2008, p. 256).

5. Results

5.1 General Remarks

As the likert-scale has been designed ranging from "strongly agree" to "strongly disagree" the lower the mean in the *t*-test the higher the respondents agreement.

As common as in empirical studies the 10% significance level will be used as threshold. As sample size is important for the obtainment of statistical significance (Burns R. B., Burns R. A., 2008, p. 219), the fact that the size of the two samples is relatively small (n = 20), is assumed to be the reason for the frequent occurrence of significance levels > 10%.

5.2 Results for Instore Marketing

H_1 posited an improved capability of the Concession model to establish a holistic brand identity compared to the SiSC.

The empirical results support this postulation. The *sales area of the CM fits much better to the image consumers have of the brand* than compared to the sales floors of the SiSC (CM: M = 1.7; SiSC: M = 2.05). The results here can be accepted as statistically significant (sig = 0.068) at the 10% level.

Since an adjustment of the design of the sales area to the overall marketing strategy (integrated approach) has been determined as a success factor of the CM consumers probably constituted their image towards the brand especially from offline and online brand communication (advertising) and hence, note and appreciate the coherence to these communication tools of the sales area.

5.3 Results for Merchandise

In H_{2-1} a better appeal of the assortment to consumers with the CM compared to the SiSC was supposed.

The results show *a trend to support the hypothesis,* as three out of four indicators used to operationalize this hypothesis reflect a superior performance of the CM regarding assortment. However, the means of the single indicators (single statements), only slightly differ and are insignificant. Except for the *retrieval regarding the actuality of the assortment* ("In the sales area of this European fashion company I can always find fashionable and trendy products."). Here, the results suggest a *superiority of the CM* (Concession: M = 1.8500; SiSC: M = 2.9500; sig = 0.284). This result is confirmed by the counterstatement ("The major part of the products seems boring to me."). Consumers perceive the product range offered with the SiSC more "boring" than with the CM (Concession: M = 3.9500; SiSC: M = 3.6500). These results can be attributed to the high(er) fashion degree that characterizes the assortment, offered in a sales area of the Concession model, and has been determined as a success factor.

Therefore, consumers seem to perceive and appreciate the availability of more fashionable clothes (higher fashion degree) and hence are less attracted by the rather conservative garments that characterize the assortment within the framework of the SiSC.

H_{2-2} proposed an optimized supply and replenishment of products in the case of the CM.

The results show a *positive sign to support the hypothesis.* Both indicators used are in favour of the hypothesis. Hence, the benefit of the differentiated use of continuous product replenishment and active merchandising management that has been determined as success factor of the CM, seem to be perceived and valued by the consumer. Thus, is reflected in the result. However, the result of the indicator that measures the replenishment ("My size is always available.") is insignificant (sig = 0.597).

5.4 Results for Personal Selling

H_{3-1} proposed the improved capability to provide sales consultancy to consumers by the CM compared to the SiSC.

There is no evidence regarding H_{3-1} since the means of both samples do not differ.

This result is contrary to expectations as it is not consistent with the success factors determined, and does not support the current findings of Li/Chan/Lewis (Li J., Chan T., Lewis M., 2012, p. 28). According to these, personal density with the SISC is much lower as a sales person is responsible for the supervision of multiple brands and therefore the SiSC should be less capable to provide sales consultancy to every consumers than compared to the CM. However, the general positive attitude towards the service level of ECI might be the reason for this result.

In H_{3-2} a higher competence of sales personnel employed by the CM compared to sales staff of the SiSC was postulated.

The results *show some support for the hypothesis.*

Asking directly about the sales personnel's competence ("The sales personnel are competent."), the Concession model ranks only slightly better than the SiSC (CM: M = 1.700; SiSC: M = 1.850; sig = 0.525). Operationalizing competence into specific indicators, that allow an improved comparison of the two concepts, as the competence focus with sales personnel of both concepts differ, reveal that sales personnel of the CM shows a more profound product knowledge of the particular European fashion company's products (CM: M = 1.7000; SiSC: M = 2.1000; sig = 0.163) that is also slightly reflected when asking more specifically ("The sales personnel are well versed in the cuts of the European fashion company's products.") (CM: M = 1.9000; SiSC: M = 2.1000; sig = 0.407→insignificant). However, the CM performs marginally worse regarding the indicator that asks for the presentation of new products to consumers (CM: M = 2.1000; SiSC: 1.9500; sig = 0.560 →insignificant).

The results of the particular indicators suggest (three out of four statements support the hypothesis) that consumers perceive the improved familiarity with the products of the European fashion company (in-depth product knowledge) by the employees in the case of the CM. This might be caused by trainings and information they receive with sales at the start of sales of every new collection.

5.5 Result for Overall Assessment

The superordinated H_4 proposed a higher attractiveness of a sales area based on the CM than compared to a sales floor managed by means of the SiSC.

In order to examine this hypothesis a triangulation approach (cf. Frick U., 2004) was chosen. The verification of hypotheses H_{1-2}, H_{2-1}, and H_{3-2} (higher appeal of sales area's design; higher appeal of assortment and higher competence of sales personnel) has been considered as these cover the three categories determined most

comprehensively, and hence allow executing a general evaluation. Furthermore, additional statements as well as purchase frequency and change rates at the POS have been considered.

As the tests of the three hypotheses have at least shown *some results that support the hypotheses*, it might indicate to support the superordinated hypothesis as well. However in order to test H_4 more comprehensively a further statement ("I visit this shopping centre exclusively because of the array of the European fashion company's products.") has been examined. *The result of the mean CM shows that sales areas based on the CM drive consumers much more to visit the shopping centre exclusively due to the offer of the European fashion company's products than a sales area managed as a SiSC does (CM: M = 2.9500; SiSC: M = 3.6509).* This is a strong and significant result (sig = 0.070). Next to the test of these single indicators that have been used to take into account of the "Theory of Partial Comparisons" statements that ask for the general performance of the sales area have been used. The results of these reveal that the *CM performs better in terms of its general assessment* (CM: M = 1.6000); SiSC: M = 2.0000; sig = 0.012) as well as in the capacity to fulfil the expectations of consumers (CM: M = 1.900; SiSC: M = 2.000; sig = 0.537→insignificant).

Comparing the purchase frequencies of both models the CM performed with 35% versus 20% for the SiSC more successfully. Furthermore, the relative number of changes or returns ("others") was considerably lower.

Considering all mentioned indicators, results *strongly suggest to support the hypothesis*. Hence, a higher attractiveness and related a superior performance of the Concession model is indicated.

6. Conclusion

This work was the first attempt to study the consumer perception regarding the two retail concepts SiSC and CM based on a direct consumer survey.

The following findings could be made:
- Consumers seem to notice a better fit of the sales area's design with the brand image they have in the case of the CM
- Consumers seem to perceive the superiority of assortment building with the CM. They possibly appreciate the availability of fashionable (high-fashion clothes) (CM) and are less attracted by the rather conservative garments that characterize the assortment of the SiSC.
- Consumers seem to perceive an optimized replenishment with the CM but do not note a difference regarding the merchandise volume offered.
- Consumers probably do not perceive an increased availability of sales advice caused by an increase in sales personnel (CM)).
- Consumers possibly perceive an improved familiarity with the European fashion company's products by sales personnel employed by the manufacturer (CM)
- Sales areas managed by the CMmight drive consumers more to visit a particular shopping centre because of the particular brand presence than sales areas of the SiSC.

Based on these findings the questions initially raised can be answered as follows:

Consumers seemingly perceive the majority of the postulated benefits of the CM since 5 out of 6 hypotheses on the benefits of the Concession model were at least supported to some extent. This could indicate that the CM increases the general attractiveness of a sales area from a consumer perspective.

7. Limitations & Future Research

As with all research the present study is constrained by certain limitations.

Firstly, the sample size (n = 20) of the two samples was relatively small. This might have caused significance levels of > 10%. As a consequence there is a high probability that some results occurred by coincidence.

Secondly, a further limitation results from the process of data collection. Data was only acquired in three different sales areas within department stores of one Spanish retail chain in one country (Spain). Furthermore, the survey took place during a very limited period of time (three days). Due to these circumstances, the present results can only be generalized to a very limited extent.

Thirdly, constraints result from the validity of the executed research. It cannot fully be guaranteed that the operationalization used measured the theoretical construct although by using multiple statements it has been aimed to represent the variables in a best possible way.

Fourthly, it cannot be excluded that consumers included past experiences made on other sales floors of the European fashion company when evaluating the performance of the particular sales area.

Resulting from the limitations and indicated by the findings of the present work there is a multitude of areas future research might address.

In order to improve the representativeness of the present work, future research should be executed using bigger samples. Data gathering should take place in different department stores eventually in different countries in order to enhance the generalizability of the findings and to be able to analyse cross-cultural aspects.

Furthermore, it is suggested to transfer the present research to other consumer goods industries as for instance the cosmetic or electronic industry as well, in order to investigate if proof for the transfer of the determined benefits to other industries can be found.

Moreover it should be investigated whether the different models show particularities with reference to consumer loyalty that could be caused by the different values retailer and manufacturer impart to their consumers (store versus brand loyalty).

A further suggestion result from the methodology applied.

In future research longitudinal studies should be executed in order to analyse and compare consumer perceptions with the transition from SiSC to the CM (pre & post take-over test)

Exploring these and other scenarios might be a direction for extending the present research.

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Determination of Success Factors of the Shop-in-Shop and the Concession Model in the Fashion Industry: An Empirical Analysis of Consumer Perception in the Case of an European Fashion Company in Spain

Appendix 1

Category	Characteristic	Success factor of the SiSC	Success factor of the Concession model
Instore Marketing	Design of POS	rather clean character of sales area	emotional appeal of sales area
			integrated brand appearance of sales area
	Promotion	price-related promotions	brand-related promotional activities
		regional orientation of POS marketing activities	nationally uniform promotions
Merchandise	Assortment	deep product choice	clearly arranged product range adjusted to collection statement
		rather conservative and mass-conform garments.	assortment characterized by garments of different fashion degrees and especially high-fashion clothes
		balanced availability of particular product groups across overall assortment of the different brands.	availability of all product group within the sales area
	Merchandise management		optimized merchandise management by means of differentiated use of continuous replenishment and continuous merchandising
Personal selling	Human resource management	authorization for staff to advise other brands & hence to accompany consumers to other branded sales areas	permanent availability of sales personnel and sales consultancy
		increase of objectivity in sales consultancy	embodiment of brand image by sales personnel
	Product competence	broad competence across product groups	competence focused on products of the own brand

Appendix 2   Success Factors of the SiSC and the CM

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