

Analysing Omni-Channel Strategies of the Turkish Clothing Sector

DOI: 10.5604/01.3001.0013.2896

Ege University,
Department of Textile Engineering,
35100 Bornova – Izmir, Turkey
e-mail: seher.kanat@ege.edu.tr

Abstract

Nowadays, the gradually worsening working life and living conditions of Turkey are channeling consumers towards simple and pointless purchasing experiences. Therefore, the omni-channel strategy, which presents a continuous purchasing experience to consumers and provides full integration of different channels (physical store, online store, mobile application, social media etc.), appears to be a significant factor. At this point, it can be clearly and explicitly seen that the omni-channel strategy must be used during the transmission of clothing products, which are essential for living, to consumers. In this context, this study aims to analyse the omni-channel strategies of the Turkish clothing sector, which is a significant player of the global clothing market. In accordance with the aim of the research, omni-channel strategies of successful Turkish clothing enterprises, which possess their own brands and retail chains, are analysed. According to the results obtained, Turkish clothing enterprises have not been able to provide a full integration of their current channels at this time. However, they have actualised successful implementations with regard to channel integration and continue to work on this issue.

Key words: Omni-channel, channel, integration, clothing market, Turkish clothing sector.

Introduction

Consumers usually prefer to purchase clothing products by trying and feeling. However, the gradually worsening working life and living conditions channel consumers towards online shopping, where the consumer, who is confronted with a dilemma, researches clothing products online, purchases them offline or purchases online, and requests easy return and exchange conditions. In this context, clothing enterprises, which reach out to consumers via multi-channels, must also provide a connection between their channels.

As can be seen from the literature, enterprises are proceeding to cross-channels and omni-channels from multi-channels. The omni-channel strategy, which provides full integration between channels (in other words the customer can use all channels for all operations with a continuous connection), is a new concept for enterprises. However, the rapid alterations within social living and the increasingly brutal rivalry force enterprises to diversify and adopt new strategies rapidly. Thus, clothing enterprises also recognise the omni-channel strategy and are trying to adopt it.

At this point in time, it is necessary to pay attention to the Turkish clothing

sector, which is a significant and essential player of the global clothing market. In this context, this study aims to analyse the omni-channel strategies of the sector. In accordance with the aim of the research, omni-channel strategies of successful Turkish clothing enterprises, which possess their own brands and retail chains, are analysed. There are many studies in the literature which present and analyse the omni-channel strategy from different perspectives. Moreover, there are some studies which analyse clothing consumers' points of view towards omni-channel strategies. However, there are not any researches which analyse the omni-channel strategy with regard to the clothing sector. Therefore, this research differs from other studies because it focuses on omni-channel strategies of the Turkish clothing sector, which is one of the significant players.

Omni-channel strategy and its features

Nowadays, customers tend to use more channels and touch-points (website, social media, mobile application etc.) during their shopping journey, whether in the search, purchase or post-purchase stage [1]. Thus, channels are defined as the different touch points or mediums through which the firm and customer interact [1, 2].

Here, channel management refers to the process by which a company analyses, organises and controls its channels. This can range from the complete separation of channels to total integration with full

coordination, with a wide range of gradations and strategies between the two extremes. The main differences between these concepts are the different degrees to which the customer can trigger channel interaction and to which the retailer can control channel integration [1].

Selecting the right combination of metrics to monitor and manage distribution is a challenge for even the most sophisticated marketers, and it is not getting easier. The increase in the variety of channel formats and the progression from single to multi-channel then to omni-channel marketing has made shopping and buying more convenient for shoppers, but trickier to manage for marketers – both upstream suppliers and downstream retailers [3]. In this context, the main channel types can be listed as single channel, multi-channel, cross-channel and omni-channel. The main properties of the omni-channel strategy are summarised in *Table 1*, in which it is also compared with other channel strategies.

In a single-channel approach, retailers only operate one sales channel and a logistic system is dedicated for this individual channel. However, in a multi-channel approach, retailers operate multiple channels, but with segregated units, creating stand-alone systems for operations and logistics. Customers obtain products either in store or via direct customer deliveries. Processes are not integrated from a customer perspective and there is no operational or logistics interface between the two channels [6]. In other words, multichannel refers to the design,

Table 1. Main properties of the omni-channel strategy and its comparison with other channel strategies [1, 4, 5].

	Multi-channel	Cross-channel	Omni-channel
Concept	Division between channels	Partial integration of some channels	Integration of all widespread channels
Degree of integration	None	Enables switching between certain channels and touch-points	Total
Retail channels	Store, website and mobile	Store, website, mobile, social media, customer touch-points	Store, website, mobile, social media, customer touch-points
Customer relationship focus	Customer-retail channel focus	Customer-retail channel focus	Customer-retail channel-brand focus
Objectives	Channel objectives (sales per channel, experience per channel)	By channel or connected channels and touch-points	All channels work together to offer a holistic customer experience
Channel management	Per channel Management of channels and customer touch-points geared toward optimising the experience with each one Perceived interaction with the channel	By channel or connected channels and touch-points Perceived partial interaction with the brand	Cross-channel Synergetic management of the channels and customer touch-points geared toward optimising the holistic experience Perceived interaction with the brand
Customers	No possibility of triggering interaction Use channels in parallel	Can trigger partial interaction Use channels in parallel	Can trigger full interaction Use channels simultaneously
Retailers	No possibility of controlling integration of all channels	Control partial integration of all channels	Control full integration of all channels
Sales people	Do not adapt selling behaviour	Adapt selling behavior using different arguments depending on the channel	Adapt selling behavior using different arguments depending on each customer's needs and knowledge of the product
Data	Data are not shared across channels	Data are partially shared across channels	Data are shared across channels

deployment, coordination and evaluation of the different channels through which the marketer acquires, retains and develops customers. Its focus is on managing and optimising the performance of each channel [3].

Cross-channel retailing is the set of activities involved in selling merchandise or services through more than one channel or all widespread channels, whereby the customer can trigger partial channel interaction and/or the retailer controls partial channel integration [2]. When channels work independently of each other, they create fragmented supply chains and struggle to deliver a consistent and reliable consumer experience. Therefore, omni-channel retailing aims to address this issue by coordinating the process and technologies across all channels to

provide seamless, consistent and more reliable services for consumers [7].

“Omnis” is Latin for “all” or “universal”, meaning all channels together [8]. In this context, omni-channel is defined as a synchronised operating model in which all of the company’s channels are aligned and present a single face to the customer, along with one consistent way of doing business [9]. Omni-channel retailing uses and integrates multiple channels to match how customers shop and to provide a seamless and consistent retail service experience no matter which channel is used to search, buy or return products [10]. Thus, it can be said that logistics is the backbone of the omni-channel strategy and retailer success is intrinsically linked to logistics effectiveness [11].

Omni-channel retailing combines traditional with online commerce through the integration of business processes that aim to satisfy consumer demand, regardless of place or time, and to create a seamless shopping experience. Omni-channel customer experience occurs when customers can order from one channel (for example, online), collect through another (for example, a physical store), and if required return via a third channel (for example, from the home or drop-off point) [12]. Thus, the omni-channel follows a customer-centered focus featuring a holistic shopping experience, one in which a customer’s buying journey is smooth and seamless irrespective of the channels used [8]. Because the channels are jointly managed, customers expect to have the same brand experience wherever and whenever they interact the the company [1].

Table 2. General properties of participating Turkish clothing enterprises. *Note:* *Enterprise names are given in alphabetical order.

Enterprise name*	Establishment year	Business segment	Brand name
Adil Işık	1992	Women wear	adL, Love my body
Beymen	1969	Women and men wear	Beymen
DeFacto	2003	Clothes for women, men, teens and kids	DeFacto
İpekyol	1986	Womens wear	İpekyol, Machka, Twist
Kiğılı	1938	Mens wear	Kiğılı, Abdullah Kiğılı
Koton	1988	Clothes for women, men, teens and kids	Koton, Ole
LC Waikiki	1988	Clothes for women, men, teens and kids	LC Waikiki (LCW)
Mavi Giyim	1991	Sports and jeans wear for women and men	Mavi
Panço Giyim	1978	Clothes for kids and babies	Panço
Sarar Giyim	1944	Mens and womens wear and home textile	Sarar, Sarar Woman, Interview, C.C.S., Sartoria, Sarar Scarf, Sarev

Omni-channel retailing is an integrated sales experience that melds the advantages of physical stores with the information-rich experience of online shopping. As the retail industry evolves towards a seamless omni-channel retailing experience, the distinctions between physical and online will vanish, turning the world into a showroom without walls [13]. In other words, omni-channel retailing is the synergetic management of numerous available channels and customer touch points in such a way that the customer experience and the performance over all channels are optimised. Omni-channel retailing evaluates every touch point and channel alternative to enrich the customer experience and provides an integrat-

Table 3. Current channels of participating Turkish clothing enterprises and their opening dates.

Enterprise name	Current channels				Opening dates of channels			
	Physical store	Online store	Mobile application	Social media	Physical store	Online store	Mobile application	Social media
Adil Işık	✓	✓	✓	✓	1992	2012	2016	2010
Beymen	✓	✓	✓	✓	1971	2010	2014	2010
DeFacto	✓	✓	v	✓	2005	2014	2015	2011
İpekyol	✓	✓	✓	✓	1989	2012	2017	2010
Kiğılı	✓	✓	–	✓	1969	2009	–	2010
Koton	✓	✓	–	✓	1988	2015	–	2009
LC Waikiki	✓	✓	✓	✓	1997	2011	2014	2011
Mavi Giyim	✓	✓	–	✓	1991	2013	–	2009
Panço Giyim	✓	✓	–	✓	1984	2009	–	2011
Sarar Giyim	✓	✓	–	✓	1944	2011	–	2012

ed sales experience that combines the advantages of physical stores with the enhanced information level provided by online shopping [14]. With an advanced omni-channel logistics approach, neither the customer nor the retailer distinguishes between channels anymore [6].

Omni-channel retailing exhibits four key differences in channel organization. First, it involves more channels; second, it implies a broader perspective as it includes not only channels but also customer touch points; third, it induces the disappearance of borders between channels, and fourth, most importantly, being the focal differentiator of omni-channel retailing, the customer brand experience is highly specific [13]. Thus, omni-channel strategy refers to an ideal one that offers several channels (such as click and collect, order in store, deliver to home, order online and return to store, show-rooms and other combinations of online and traditional retail activities) in accordance with the latest technological developments and current consumer behaviour [1, 14]. Therefore, in an omni-channel environment, mobile technologies are crucial due to the gap between offline and online channels. Mobile devices can bridge that gap by bringing the online experience into the physical store. In addition, the combination of interactive and entertaining technologies attracts more consumers and improves the shopping experience. The growing role of in-store technologies also creates an additional dimension. This includes technologies for customers, such as free internet, interactive screens, augmented reality, virtual mirrors/fitting rooms, digital signage, beacons, intelligent self-service kiosks and QR codes, in addition to customers' own mobile devices. There are also technologies for staff such as tablets or touch screens to help the seller in different ways during the buying process [1].

Purpose and method of the research

This study aims to analyse the omni-channel strategies of the Turkish clothing sector, which is a significant player of the global clothing market. In accordance with the aim of the research, omni-channel strategies of successful Turkish clothing enterprises, which possess their own brands and retail chains, are analysed.

Within the scope of the research, interviews were conducted with the marketing managers of Turkish clothing enterprises and a questionnaire form consisting of 8 main questions was sent to them. During the limited period of time assigned for this research, which was May of 2018,

the enterprises which had not returned or had not been able to return the form were removed from the research. Besides this, in parallel with the survey, some data were collected from secondary data resources. Finally, the data collected, been obtained from primary (survey) and secondary data resources, were evaluated and analysed.

Findings of the research and their analysis

All of the participating successful Turkish clothing enterprises possess their own brand/brands and retail chains. The establishment years, business segments and brands of these enterprises are summarised in **Table 2**. As can be seen from the

Table 4. Current social media channels of participating Turkish clothing enterprises.

Enterprise name	Current social media channels
Adil Işık	Twitter, Facebook, Instagram, YouTube
Beymen	Twitter, Facebook, Instagram, Google+
DeFacto	Facebook, Instagram, Twitter, YouTube, Google+, LinkedIn, Pinterest
İpekyol	Twitter, Facebook, Instagram, Pinterest, YouTube
Kiğılı	Twitter, Facebook, Pinterest, Instagram, Google+, YouTube
Koton	Instagram, Facebook, Twitter, YouTube, Google+
LC Waikiki	Twitter, Facebook, Pinterest, Instagram, Google+, YouTube, LinkedIn
Mavi Giyim	Facebook, Twitter, Pinterest, Instagram, Google+, Tumblr, YouTube
Panço Giyim	Twitter, Facebook, Instagram, Google+
Sarar Giyim	Instagram, Facebook, Twitter, YouTube

Table 5. Shares of current channels within participating enterprises' total turnovers. **Note:** * 44% of the total turnover comes from exports without brand name.

Enterprise name	Shares of channels within total turnovers			
	Physical store	Online store	Mobile application	Social media
Adil Işık	95%		%5	No sales
Beymen	91%	6.2%	2.8%	No sales
DeFacto	%97	%1.5	%1.5	Included in 3%
İpekyol	%94		%6	No sales
Kiğılı	%96	%4	Non-existent	Included in 4%
Koton	%96	%3	Non-existent	%1
LC Waikiki	%95		%5	No sales
Mavi Giyim	%97.5	%2	Non-existent	Included in 2%
Panço Giyim	%95	%5	Non-existent	No sales
Sarar Giyim	%55*	%1	Non-existent	No sales

Table 6. Services provided by participating enterprises via current channels.

Enterprise name	Channels	Purchase	Product exchange	Product return	Product modification	Technical information	Comment on products	Read other comments
Adil Işık	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	✓	–	✓	–	✓	–	–
	Social media	–	–	–	–	–	✓	✓
Beymen	Physical store	✓	✓	✓	✓	✓	✓	✓
	Online store	✓	–	✓	–	✓	✓	–
	Mobile application	✓	–	✓	–	✓	✓	–
	Social media	–	–	–	–	–	✓	✓
DeFacto	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	✓	–	✓	–	✓	–	–
	Social media	✓	–	✓	–	–	✓	✓
İpekyol	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	✓	–	✓	–	✓	–	–
	Social media	–	–	–	–	–	✓	✓
Kiğılı	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	✓	✓	–	✓	–	–
	Mobile application	–	–	–	–	–	–	–
	Social media	✓	✓	✓	–	–	✓	✓
Koton	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	–	–	–	–	–	–	–
	Social media	✓	–	✓	–	–	✓	✓
LC Waikiki	Physical store	✓	✓	✓	–	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	✓	–	✓	–	✓	–	–
	Social media	–	–	–	–	–	✓	✓
Mavi Giyim	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	✓	✓	–	✓	–	–
	Mobile application	–	–	–	–	–	–	–
	Social media	✓	✓	✓	–	–	✓	✓
Panço Giyim	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	–	✓	–	✓	–	–
	Mobile application	–	–	–	–	–	–	–
	Social media	–	–	–	–	–	✓	✓
Sarar Giyim	Physical store	✓	✓	✓	✓	✓	✓	–
	Online store	✓	✓	✓	–	✓	–	–
	Mobile application	–	–	–	–	–	–	–
	Social media	–	–	–	–	–	✓	✓

table, six out of the ten enterprises were established after 1980. Although the history of the Turkish textile and clothing sector dates back to the first years of the Turkish Republic, the clothing sector was essentially improved in the 1980s, in which open economy policies were preferred. In this context, the number of operating enterprises within the sector rapidly increased after the 1980s. On the other hand, when the business segments of participating enterprises are analysed, it can be seen that only three enterprises focus on one segment, whereas other enterprises operate in 2-4 segments. In other words, three enterprises implement a brand strengthening strategy by focusing on the segment in which they

are best. As another option, most of the enterprises try to present products in all sub-segments of the clothing sector, because they want to attract more customers and capital by fulfilling the different needs of individuals and their loved ones. Moreover, half of the participating enterprises possess one brand, whereas the others own more than one.

According to the research results obtained, the participating Turkish clothing enterprises use more than one channel in order to reach customers (**Table 3**). Therefore, all participating enterprises have successfully implemented a multi-channel strategy. All of them primarily reach their customers via physical

stores. They have preferred social media and/or online stores as a second channel. Enterprises have both joined social media and opened their own online stores in order to increase communication between their brands and customers, and consequently their sales. Finally, enterprises have started to use the mobile application channel. All of the participating enterprises possess online store and social media accounts, whereas only half of them own a mobile application, because despite e-commerce having been improved and become widespread in Turkey since the 2000s, mobile trade history only dates back to 3-5 years ago. Current social media channels of participating enterprises are summarised in **Table 4**.

Table 7. Channel integration of participating enterprises-1. **Note:** * These services are only provided for the Abdullah Kiğılı brand.

	Adil Işık	Beymen	DeFacto	İpekyol	Kiğılı	Koton	LC Waikiki	Mavi Giyim	Panço Giyim	Sarar Giyim
Our customers can receive the online purchased products from our physical stores (click & collect service).	-	✓	✓	-	✓	-	✓	-	-	-
Our customers can return online purchased products to our physical stores.	✓	✓	✓	✓	-	-	✓	✓	-	-
Our customers can exchange online purchased products in our physical stores.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Our customers can modify online purchased products in our physical stores.	-	✓	✓	✓	✓	✓	-	✓	✓	✓
Products purchased from physical stores are delivered to our customers' houses (home delivery service).	-	✓	-	-	*	-	-	-	-	-
Our customers can return physically purchased products to our online store/mobile application.	-	-	-	-	-	-	-	-	-	-
Our customers can exchange physically purchased products in our online store/mobile application.	-	-	-	-	-	-	-	-	-	-
Our customers can modify physically purchased products in our online store/mobile application.	-	-	-	-	-	-	-	-	-	-
We provide free access to our online store/mobile application in our physical stores.	-	✓	-	-	*	-	-	-	-	-
We provide free access to our online store in our physical stores via interior kiosks.	-	✓	✓	-	-	-	-	-	-	-
We give tablets to our salesperson who serve in physical stores. Therefore, the salesperson can give instant information to our customers about products' stock status and properties.	-	✓	✓	✓	*	-	✓	-	-	-

Table 8. Channel integration of participating enterprises-2. **Note:** * This service is only provided for the Abdullah Kiğılı brand.

		Adil Işık	Beymen	DeFacto	İpekyol	Kiğılı	Koton	LC Waikiki	Mavi Giyim	Panço Giyim	Sarar Giyim
Data of physical stores and online stores are	not shared with each other.	✓									✓
	partially shared with each other.		✓			✓	✓	✓	✓	✓	
	completely shared with each other.			✓	✓						
Our salesperson	cannot use any channels.										
	can use one channel.	✓				✓	✓	✓	✓	✓	✓
	can use different channels.		✓	✓	✓	*					
Our channels are	not integrated.										
	partially integrated.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	completely integrated.										
The focal point of our enterprise is	its customers and retail activities.										
	its customers, brand(s) and retail activities.	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

As can be seen, participating enterprises reach their customers via 4-7 social media channels, with Facebook, Twitter and Instagram being the most preferred. In other words, all participating enterprises use these three channels.

When the shares of channels within the enterprises' total turnovers are analysed, it can be seen that online sales (online store, mobile application and social media sales) take shares of between 1% and 9% (Table 5). The average share of ten enterprises' online sales within their total turnovers is approximately 4,5%. Participating enterprises take the lion's share from their own online stores with regard to online sales. As can be seen from the results obtained, mobile application and

social media sales are the newest sale channels for enterprises and nowadays they are putting these channels on their agenda. Only half of the participating enterprises make sales via a mobile application, whereas 40% of them sell through social media channels (Instagram and/or Facebook). In this context, it can be said that enterprises prefer to use social media for advertisements and communication with customers.

According to the results obtained from the research, participating enterprises provide many services to their customers in their physical stores (Table 6). First of all, customers can purchase products from physical stores. Secondly, they can exchange and return purchased products.

Besides this, product modifications can be made (only one enterprise does not provide this service). Moreover, customers can get technical information about the products (colour, size, size charts, fabric type etc.), and they can comment on products. However, they cannot see and read the other customers' comments. On the other hand, two brands, Beymen and Abdullah Kiğılı (both brands operate in the luxury brand sector), also provide this service in their physical stores by offering free internet.

Participating enterprises provided services via other channels, differing from one another, as well as in sale circumstances (whether they make sales or not). If the enterprise makes sales both in an

online store and mobile application, the exchange, return and modification conditions are the same for both channels. When making sales through social media, conditions are similar to online store circumstances. In this area, two factors demand attention: Firstly, participating enterprises do not prefer to give their products' technical information in their social media accounts. If an enterprise makes sales through a social media channel, it indicates products' codes and gives a link to an online store. Secondly, customers cannot comment on products and read other statements in online stores and mobile applications. However, customers can comment, via enterprises' social media accounts, as much as they want, and also they can see and read other customers' statements. According to another result obtained, customers can return products to online stores; however, they cannot exchange them in online stores. Only three enterprises (Mavi, Kiğılı and Sarar) provide an exchange service in their online stores. In other words, they exchange online purchased products via their online store.

The survey offers 22 statements under 5 main questions about channel integration. The marketing managers of the participating Turkish clothing enterprises were required to choose their agreement types for each of these statements. The findings are given in *Tables 7* and *8*. As can be seen from the results obtained, all enterprises have a lack of providing return, exchange and modification services in their online stores/mobile applications for physically purchased products (*Table 7*). Customers have to return their physically purchased products to physical stores. Also, they have to exchange and modify these products in physical stores. On the other hand, online purchased products can be received from physical stores. This service is named Click & Collect, and it is provided by Beymen, DeFacto, Kiğılı and LC Waikiki. If online purchased clothing products are received in physical stores, delivery delays can be eliminated. Moreover, customers can try on these products in the delivery store and if they don't like them, they can return or exchange them immediately.

According to the other results obtained, 60% of the participating enterprises accept online purchased products' returns in their physical stores. Besides this, all enterprises exchange online purchased

products in their physical stores. Similarly, 80% of the enterprises modify online purchased products in their physical stores. On the other hand, home delivery service (delivery of physically purchased products to customers' houses) is only possible in Beymen and Abdullah Kiğılı, which operate in the luxury brand sector. Similarly, these two luxury brands provide free access to their online store/mobile application in their physical stores. Similarly, Beymen and DeFacto provide free access right to their online stores in their physical stores via interior kiosks. On the other hand, half of the participating enterprises give tablets to their salesperson who serve in physical stores. Therefore, the salesperson can give instant information to the customers about products' stock status and properties.

As can be seen from the results obtained, only DeFacto and İpekyol completely share the data of physical stores and online stores (online store and mobile application) with each other (*Table 8*). Conversley, Adil Işık and Sarar certainly do not share the data of physical stores and online stores with each other. However, 60% of the participating enterprises partially share the data of physical stores and online stores with each other. According to another result, the salespeople of four brands (Beymen, DeFacto, İpekyol and Abdullah Kiğılı) can use different channels (for example, a salesperson who works in a physical store is able to order an absent product from an online store). On the other hand, a salesperson can only use one channel in 70% of the enterprises (for example, a salesperson who works in a physical store can only order an absent product from another physical store).

According to another result obtained, all enterprises focus on their customers, brands and retailing activities simultaneously. In other words, they have determined the necessary focal point for omni-channel implementations, and they have been moving towards this strategy. However, when the research results obtained are analysed, it can be seen that Turkish clothing enterprises have not been able to provide a full integration of their current channels at this time. Instead, all of them have achieved partial channel integration. Full channel integration is achieved when customers are able to use all channels for all operations (purchase, return, exchange, taking information etc.) with a continuous connection.

■ Results and general evaluation

Consumers request products and services which will ease their lives and provide more free time in today's intense and stressful life. Therefore, enterprises which desire to create loyal customers by providing maximum customer satisfaction continuously work on products and services which will facilitate consumers' lives. In accordance with this aim, enterprises can use the omni-channel strategy, which provides full integration of different channels. Thus, the customer can use all channels for all operations with a continuous connection and transform the purchasing process into a quick, practical and unique experience. In this context, it can be clearly and explicitly seen that the omni-channel strategy must be used during the transmission of clothing products, which are essential for living, to consumers.

The purchasing process of clothing products differ from other consumer goods' purchasing processes. Even if consumers see the size, colour, view and fitting of a clothing product on a virtual/real model; they prefer to touch the product, desire to feel its texture and see its fitting on their own bodies. Therefore, at this time, the online purchasing process, which provides great ease to consumers, has not reached the desired level in clothing products. However, consumers can return online purchased clothing products when they dislike them; afterwards, they generally head towards physical stores due to the disappointment and time loss. At the current time, limited leisure within an intense and stressful life is spent in physical stores. However, the omni-channel provides a unique shopping experience to consumers. A consumer who sees a product in a clothing brand's social media account during their transportation to work in the morning can purchase the product via an online store or mobile application at work, receive it from a physical store after work and finally they can immediately return to or exchange the product in a physical store if they dislike it. Therefore, the consumer can enjoy a continuous and effortless shopping experience.

However, it is hard to provide a full integration of channels. In order to achieve these connections, enterprises must primarily provide continuous information flow and synchronisation between channels. Besides this, they must bear the additional costs of this strategy. In spite of

these difficulties, enterprises are heading towards channel integration due to the intense rivalry and consumer desires. As can be seen from the research results, the Turkish clothing sector, which is a significant player of the global clothing market, has realised the significance and necessity of omni-channel strategies and has taken serious and important steps. According to the results obtained, Turkish clothing enterprises which possess their own brands and retail chains have provided partial channel integration so far. Most of the participating enterprises provide return, exchange and modification services for online purchased products (bought via online stores, mobile applications or social media accounts) in their physical stores. However, they do not provide these services in online stores/mobile applications for physically purchased products. As can be seen, the integration of channels has currently occurred one-sidedly.

On the other hand, only 40% of the participating enterprises provide a click & collect service in which online purchased products can be received from physical stores. Similarly, only 30% of the enterprises allow their salespeople to use all channels (online and offline) continuously. Although all participating enterprises have discovered the necessary focal point for omni-channel implementations (customers, brand(s) and retailing activities), they need to cover much greater ground in this issue. However, at this point, two Turkish clothing enterprises which have made serious progress and have undertaken successful omni-channel implementations should be underlined. Beymen, which provides services in the luxury brand sector, and DeFacto, which provides affordable services in womens, mens, teen and kids wear, are the ones who are making great progress

and achieving tremendous success in omni-channel implementations. Especially, the significant success of DeFacto should be acclaimed, because it tries to provide a continuous shopping experience to its customers in spite of its affordable products.

To sum up, the Turkish clothing sector, which is a significant player of the global clothing market, has realized the significance and necessity of omni-channel strategies and has achieved significant progress. Although sector needs to cover much greater ground in this issue, it is continuing its progress and improvement.



References

1. Mosquera A, Olarte Pascual C, Juaneda Ayensa E. Understanding the customer experience in the age of omni-channel shopping. *Icono 14* 2017; 15, 2: 166-185.
2. Beck N, Rygl D. Categorization of multiple channel retailing in multi-, cross- and omni-channel retailing for retailers and retailing. *Journal of Retailing and Consumer Services* 2015; 27: 170-178.
3. Ailawadi KL, Farris PW. Managing multi- and omni-channel distribution: metrics and research directions. *Journal of Retailing* 2017; 93, 1: 120-135.
4. Verhoef PC, Kannan PK, Inman JJ. Form multi-channel retailing to omni-channel retailing: introduction to the special issue on multi-channel retailing. *Journal of Retailing* 2015; 91, 2: 174-181.
5. Melacini M, Perotti S, Rasini M, Tappia E. E-fulfilment and distribution in omni-channel retailing: a systematic literature review. *International Journal of Physical Distribution & Logistics Management* 2018; DOI 10.1108/IJPDLM-02-2017-0101.
6. Hübner A, Wollenburg J, Holzapfel A. Retail logistics in the transition from multi-channel to omni-channel. *International Journal of Physical Distribution & Logistics Management* 2016; 46,6/7: 562-583.
7. Saghiri S, Wilding R, Mena C, Bourlakis M. Toward a three-dimensional framework for omni-channel. *Journal of Business Research* 2017; 77: 53-67.
8. Payne EM, Peltier JW, Barger VA. Omni-channel marketing, integrated marketing communications and consumer engagement: a research agenda. *Journal of Research in Interactive Marketing* 2017; 11, 2: 185-197.
9. Bernon M, Cullen J, Gorst J. Online retail returns management: integration within an omni-channel distribution context. *International Journal of Physical Distribution & Logistics Management* 2016; 46, 6/7: 584-605.
10. Rosenmayer A, McQuilken L, Robertson N, Ogden S., Moni-channel service failures and recoveries: refined typologies using Facebook complaints. *Journal of Services Marketing* 2018; DOI 10.1108/JSM-04-2017-0117.
11. Murfield M, Boone CA, Rutner P, Thomas R. Investigating logistics service quality in omni-channel retailing. *International Journal of Physical Distribution & Logistics Management* 2017; 47, 4: 263-296.
12. Yumurtacı Hüseyinoğlu İÖ, Galipoğlu E, Kotzab H. Social, local and mobile commerce practices in omni-channel retailing: insights from Germany and Turkey. *International Journal of Physical Distribution & Logistics Management* 2017; 45, 7/8: 711-729.
13. Picot-Coupey K, Hure E, Piveteau L. Channel design to enrich customers' shopping experiences: synchronizing clicks with bricks in an omni-channel perspective – the direct optic case. *International Journal of Physical Distribution & Logistics Management* 2016; 44, 3: 336-368.
14. Galipoğlu E, Kotzab H, Teller C, Yumurtacı Hüseyinoğlu İÖ. Omni-channel retailing research – state of the art and intellectual foundation. *International Journal of Physical Distribution & Logistics Management* 2018; DOI 10.1108/IJPDLM-10-2016-0292.

Received 12.06.2018 Reviewed 04.04.2019

TextileExchange Sustainability Conference
VANCOUVER 2019

Driving Impact through Integrity and Preferred Fiber & Materials
United in Action to Advance the SDGs

October 15–18, 2019 • Vancouver, British Columbia • #TextileExchange19
TextileExchange.org/2019-conference