

Indexing Fashion Omnichannel Retailing Performance

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Abstract

This research is about Omnichannel Retailing and addresses the question how the omnichanneling of retailers in the fashion market can be measured. Our sources will include books, interviews, newspapers and scientific databases.

Omnichanneling is a current topic in the fashion market, retailers all over the world face the question on how to adapt to the challenges Omnichannel Retailing sets. We are going to define what Omnichanneling is by explaining the differences between Multiple-, Multi-, Cross- and Omnichannel Retailing. After we defined omnichanneling itself, we took a set of 26 retailers to evaluate regarding their Omnichannel capabilities. Then we create an index with criteria that can measure the Omnichannel capability of each retailer.

The Omnichannel Score is based on 31 criteria, which analyze the retailers in offline, online, mobile and social aspects enables to see differences between retailers. Our findings were that retailers in the US fashion market are more advanced in Omnichannel Retailing than retailers in the German fashion market. Our top three Omnichannel retailers were Sears with an Omnichannel Score of 91, followed by KOHL'S and Marks&Spencer, both with a Omnichannel Score of 88. The best Omnichannel Retailer from Germany was Adidas with the fourth place and an Omnichannel Score of 81.

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List of abbreviations

| | |
|------|-----------------------------|
| CAGR | Compound Annual Growth Rate |
| FOC | Factory Outlet Center |

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1 Omnichanneling

Omnichanneling, understood as the integration of different sales and communication channels, is a new challenge for fashion retailers. After many of them established additional online channels to their brick-and-mortar stores, now the integration of these and other communication and sales channels is an important task because they must provide a consistent and integrative customer journey for the consumer.

Pure online shops like amazon or Tmall of alibaba are short of shopping experiences and customer loyalty. But on the other hand, stationary stores are becoming more and more a point of view, not only a point of sale (“Vom Point of Sale zum Point of View,” 2016). Consumers also want more online shopping experience: “Consumers not only go online, they live online.” (Google, 2015)

Since the internet of everything has arrived in our everyday lives, these two sales channels must be more connected. Thus would create a new kind of shopping experience, like buying in-store via tablet from the retailer or to be counseled by a salesman online with curated shopping and having the product delivered to their home on the same day. In result of that, consumers will be able to shop easier and more convenient by being able to switch at any given time and place between different channels.

But not only has the consumer gained advantages from this range of new possibilities. Retailers and companies obtain the opportunity to gain much more information about their customers, whether it is how they pay, if they even go into a physical store or when does a customer order something, to just name a few. However, brands and retailers have to make these moves quickly. Of course, some retailers will start on different conditions, e.g. wholesalers do not have the same prerequisite like a vertically integrated company. Consequently, there is no prime example a company can use, which means there are huge gaps between retailers, as we see in the following.

This transition to Omnichannel Retailing is a long progress accompanied by big investments. Omnichanneling changes consumers’ behavior, delivery services, infrastructure and many aspects more. Companies who fail to recognize this next step of retailing will be driven out of the market in the long term.

Regarding to this development in the global fashion market, we want to know how our selected German and international retailers are excelling in omnichanneling and why. Therefore, we defined omnichanneling and what it consists of in a consumer service perspective. An Omnichannel index we will measure 26 retailers and illustrate our findings in a ranking. Before establishing our own index to measure omnichanneling in companies, it is important to be aware of the development of omnichanneling, already existing similar indexes and the situation of the fashion sector.

Recent headlines of the specialized press and numerous quotes of professionals of the sector proof that multichannel retailing is a key competence companies must obtain soon if they plan to remain a key player in the fashion industry. The big US-companies like Walmart and Macys fight for top-positions in the omnichanneling sector (Howe, 2014) and Senior Vice President Adidas Brand Commerce explains that Adidas “wants to give their customers the best brand experience possible, regardless of the place or time” (Nowicki & Wolf, 2016), which indicates the importance of Multichannel retailing.

Multichannel retailing is a generic term for many different natures of the pluralization of the trade channels in the fashion market. Crosschannel, Multiple-Channel and Omnichannel are three examples for these natures. All these natures have the consumer-orientated evolution of trade in terms of distribution channels in common, but different strategies to accomplish that (Schramm-Klein, Wagner, Neus, Swoboda, & Foscht, 2014).

For the **Multiple-Channel Retailing**, different trade channels are combined with individual retail partners. A reason for choosing this strategy could be different pricing in the retail and the online store. The trade channels are not linked so that the customer is not confused by the different prices. But, in the time of the internet of smartphones and the internet of things, it is unlikely that the consumer fails to recognize the price differences, so he will choose to buy where it is cheaper.

Multichannel Retailing is having multiple trade channels with a similar range of goods. Customers can choose freely which channel they would like, for example informing themselves or buying online or in-store.

Crosschannel Retailing is an evolution of the Multichannel Retailing. Customers can not only choose between different channels, but also switch between them during the customer journey. An often-used example is click&collect, where the customer can order online and pick it up in-store.

Omnichannel Retailing is the connection of all the touchpoints with the customer. During the buying process, the customer can use all the trade channels parallel if he likes to. Omnichannel Retailing is “being able to operate – in any fashion – when and where the customer wants to interact with you” (Karolefski, 2016). Consumers experience one brand instead of one channel as a part of a brand (Hugo Boss, 2016).

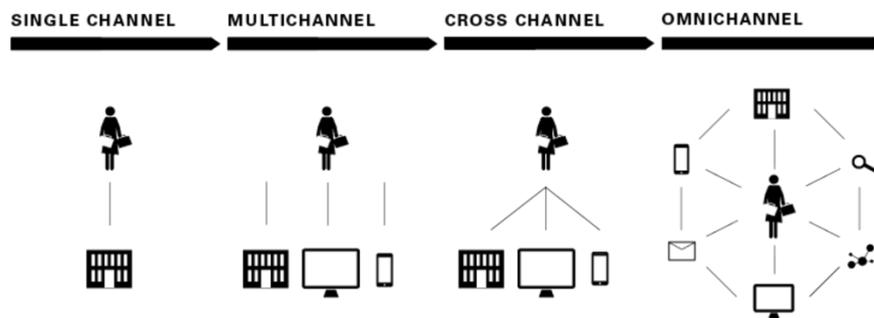


Figure 1 Comparison of different channel strategies (Hugo Boss, 2016)

This means that “pasting an online shopping portal onto a website that hasn’t been redesigned in several years or mobile optimized won’t ring true to the shoppers” today (Karolefski, 2016). Omnichannel Retailing in practice could be the use of an app in-store to scan the code of a product and receiving more details about it on the smartphone or a smartwatch. The task for companies is not only to make shifting between the single touchpoints with the customer easy, but also to encourage their employees to think and act in a way that they treat all the trade channels in the same way. This means that not only the trade channels need to be connected seamlessly, but also the customer service should be consistent, whether it is on social media, via phone or email and online chat. (Karolefski, 2016)

Relevance of Omnichannel Retailing

While DyShaun Muhammad, Vice President of Westport, says that Omnichannel-Retailing is currently not possible because it suggests “being able to do it all and preemptively meet the shoppers expectation without disrupting across any or all channels” (Karolefski, 2016), Stefan Genth, CEO of the German Retail Association HDE predicts that “at the end of the current change, those retailers that have the best connection of both online and offline will be the most successful” (Wilhelm, 2016). Retailers who are not offering all the online and offline channels flexibly, are clearly in trouble. Retailing itself is “undergoing a revolution, with the customer as the leader” (Löwer, 2015).

From a customer’s perspective, using more than one channel before buying a good has become the new normal. According to a survey from Zendesk, across all the age groups, customers who use only one channel are the minority. Even for the 55-64 year olds, 56% say that they used more than one channel with a purchase in the last 6 months. For the 18-24 year olds, 74% agreed that they used more than one channel. The same study showed that 87% of the interviewed people think that retailers must put more effort into giving a seamless buying experience (Zendesk, 2013).

In a survey conducted by the HandelsMonitor in 2013/2014 the results showed that using multiple channels is important for customers for all categories of goods. Especially important seems to be the use of multiple channels while buying clothes or shoes, which 34% of the interviewed people named as their last purchase using multiple channels. Clothes and shoes are the category with the highest percentage, followed by entertainment electronics with 23% (Schramm-Klein et al., 2014). This number illustrates the importance of Omnichannel Retailing for the fashion industry.

The study also asked what the interviewed people used the channels for. The outcomes were that the online channel is the most used one. Around two thirds said they searched for product information (76%), compared prices (77%) or looked for a specific product (79%) online. (Schramm-Klein et al., 2014) This shows that the fast and easy access to information via the internet is present at all time, whether the customer is at home or in-store. Therefore, it is important for retailers to have a consistent line in all their channels and to keep these channels connected. This will give the customer a much more convenient shopping experience.

As for the industry, omnichanneling offers significant benefits as well. Companies are able to “gain a comprehensive picture of individual customers and their preferences” (Bovensiepen, Schmaus, & Maekelburger, 2015) by having their ERP software evaluating the behavior of customers, for example when and how they switch channels during the buying process. This can then “generate significant gains in conversion rates and purchases” (Bovensiepen et al., 2015).

The integration of click&collect for example is also a way of getting more people into the stores, where they might buy additional items. Check&reserve, a similar strategy, where customers can check for the availability of a product before they go into the store, makes more sales than their online store for some retailers in England. (CIO, 2016)

Existing Omnichannel indices

To create our own index, we look at already existing ones to gain a broader perspective. Strategy& published the **2015 global Omnichannel retail index** on their website. They evaluated 19 countries or regions on their Omnichannel readiness in 9 retail segments. The scale goes from 1 to 100 based on 4 areas: consumer behavior, degree of digitization, Omnichannel potential, and infrastructure. Since this index is supposed to show how the current Omnichannel situation is in different countries or regions, we cannot apply the index directly to our research. However, we find that some aspects of the index can also be used for our research, where we want to find out how specific retailers use omnichanneling.

The consumer behavior metric is based on “degree to which customers in the specific countries already fulfill their retail purchases via an Omnichannel-approach” (Bovensiepen et al., 2015), which means consumers that use more than one channel during their buying process. Strategy& weights this metric the highest since it weighted 40% of their overall index score for each country. Since we want to know what possibilities are offered by the retailers and not how consumers use them, this metric is not suitable for our research. However, it helps visualizing how important omnichanneling is in the researched countries or regions. The more people use a Multichannel approach during the buying process, the more a retailer needs to focus on giving a pleasuring experience using those multiple channels.

The degree of sales channel digitalization describes “the combined share of Internet and mobile purchases in the specific country and retail segment” (Bovensiepen et al., 2015). This value is weighted with 20% of the overall index, so Strategy& finds this less important than the consumer behavior. While we are neither looking at countries nor at specific retail segments, this metric, as it is, can also not be adapted for our index. But looking at the amount of sales via the online and mobile channel compared to the sales through offline channel might give us an insight about how digitalized a specific retailer is. It is to find out how easy this data is accessible for us.

The Omnichannel potential is the “growth potential of Internet and mobile retailing” and describes “the average predicted CAGR (Compound Annual Growth Rate) for both Internet and mobile sales penetrations” (Bovensiepen et al., 2015), using data from Euromonitor. It is also weighted at 20% of the index. We do not think that we will gain meaningful outcomes out of this metric. But, by developing a metric based on this one, we think we can find data that can be used in our research. Looking at how retailers are trying to obtain Omnichannel competence and estimating how important it is to the company, possibly based on how much they spend on improving their channels or on statements of the retailers, is a way to apply it to our index. Research showed that it is not possible for us to get information on how much a retailer spends on improving their omnichanneling, but we found it suitable to rate the impression we have on how important omnichanneling is to the retailer.

The last metric is infrastructure. It is “the penetration of Omnichannel devices and services in the specific country” (Bovensiepen et al., 2015). It shows how many people of the population have mobile devices like smartphones or tablets, plus how many households have broadband internet. This metric is again weighted at 20 % of the index. This metric needs to be renewed too, to fit our research. We think that looking at the infrastructure of specific retailers can give valuable data for our index.

In the second edition of the **NRF – FitForCommerce Omnichannel Retail Index** (NRF & FitForCommerce, 2016) 120 retailers were tested on their Omnichannel competence in-store, on their website and their mobile site. The index measures retailers specifically, so it is much more applicable to our index. But, the index does not show the scores for the individual retailers, it only shows how many of all the retailers fulfill or do not fulfill the benchmarks of the index. It then names the best-practice retailers. It also does not weight the benchmarks in any way. Therefore, we see this index as a collection of possible benchmarks for our research.

It differs between online, in-store, mobile, end-to-end and social sharing experiences. For each of those, the index offers benchmarks and analysis. We will mention those who are valuable for our research here.

Online, the index offers benchmarks such as whether retailers do have Autosuggest for their search, live chats on product pages, filter search, in-store product availability information, recommended products area, a wish list, customer reviews. In-store, the index evaluates the retailers in terms of available WiFi, option to receive receipt via email, ability to buy in-store/ship to home, offering of online search for wanted product.

For the mobile experience, NRF and FitForCommerce looked at retailers and checked if they have a mobile optimized site, navigation bar in header, saved cart between platforms, mobile optimized email, in-store product inventory lookup and buy online/pick up in-store.

The end-to-end experience means “the full lifecycle of the experience” (NRF & FitForCommerce, 2016) from the buying process to delivery and returns. This means that customers can buy online, pick up in-store; retailers can ship from store, a supplier or the distribution center. [...] When allowing customers to buy anywhere, they should be able to return anywhere” (NRF & FitForCommerce, 2016).

Lastly, for the social sharing experience the index offers benchmarks such as whether retailers do have customer ratings, the option to write a review or the ability to upload a user generated photo.

The **Deloitte Omnichannel Customer Experience Index 2016** (Deloitte, 2016) asked testers to evaluate presence and sophistication of omnichanneling in 14 categories. To measure, Deloitte put up 71 separate omnichannel criteria. It concentrates on the key players in the Canadian and the US market.

The index emphasizes the importance of mobile and that the US market has a key advantage here. The connection between the standard eCommerce and the mobile, called mCommerce in this index, is highly important. It states that Advanced e+mCommerce is not yet achieved by either market. E+mCommerce means that retailers integrate the functionalities of eCommerce and mCommerce to “deliver a superior shopping experience” by “cross-selling through product suggestions and

allowing shoppers to post their own ratings” (Deloitte, 2016). The Omnichannel stage, which is not yet reached, represents the “complete integration of web, mobile and physical stores – a seamless, cross-platform experience that delights shoppers throughout the path of the purchase” (Deloitte, 2016).

However, we were unable to get deeper access to some of the literature. For example, the Deloitte index measured omnichanneling with 71 criteria. It would have been a great help to get the details on these criteria. Unfortunately but understandably, Deloitte refused to answer to our request. Similar happened with other sources. Often, information is not accessible for free since research was conducted by companies who want to sell their findings to the retailers. Therefore, this information could not be included in our research. In the end, with our gained knowledge of all our sources combined, we are enabled to create an index for fashion businesses.

2 Creating the Fashion Omnichannel Index

Our Omnichannel Index examines the Omnichannel capability of 26 example retailers. These were chosen via different rankings. Pure internet players as amazon or Tmall alibaba were not included. H&M, Zara (Inditex), Macy’s, Gap, TK-Maxx, LVMH, Kohl’s, Sears, and Marks & Spencer were named on the list of the 10 biggest fashion retailers worldwide (Handelsblatt, 2014). This ranking was based on the sales of each retailer. Peek&Cloppenburg and Breuninger lead the ranking of the Best-in-Class Omnichannel retailers in Germany published by Kurt Salmon. (Kurt Salmon, 2015)

New Yorker, Puma and Zalando were in the top 5 of the biggest German Fashion companies list published by Fashion United (Strijbos, 2015). It ranked the retailers on their market value. Hugo Boss, Adidas, Dior Group, Burberry, Giorgio Armani, Esprit, Calzedonia, Tommy Hilfiger and the Bestseller Group were among the top 10 fashion companies in Europe (manager magazin, 2014). The manager magazin ranked the companies on their sales. Otto Group, Karstadt, Nike and C&A were mentioned in the list of the biggest textile retailers in Germany (Textilwirtschaft, 2013).

Our 31 criteria examine the Omnichannel capabilities in 4 categories: Offline, online, mobile and social with a total maximum score of 100.

| Main category | Criteria | Maximum score |
|--------------------------|---------------------------------------|---------------|
| Offline (max 24) | Printed Catalogue | 5 |
| | Brick and Mortar | 10 |
| | Buy&Deliver to home | 2 |
| | Wifi in-store available | 2 |
| | Order when out of stock | 2 |
| | Return in-store | 3 |
| Online (max 38) | Online Shop | 10 |
| | Payment options | 3 |
| | Free shipping | 3 |
| | Free returns | 3 |
| | Related Articles, 'shop the look' | 2 |
| | Click&Collect | 5 |
| | Video for product presentation | 2 |
| | Filter search results | 2 |
| | Check availability | 2 |
| | Customer reviews | 2 |
| | Auto-complete for search | 1 |
| | Wishlist | 1 |
| | Online presentation of omnichanneling | 2 |
| Mobile (max. 21) | App | 10 |
| | App in-store | 3 |
| | Ability to scan | 3 |
| | Customer reviews | 2 |
| | Responsive Design | 2 |
| | Click to Call | 1 |
| Social Media (max. 7) | Blog | 1 |
| | Facebook | 1 |
| | Instagram | 1 |
| | Twitter | 1 |
| | Other | 3 |
| Communication | Touchpoints | 10 |

Figure 2 Criteria measuring the Fashion Omnichannel Index

Discussion

The criteria Online Shop, Brick and Mortar, App, Catalogue, Click&Collect and Return in-store are higher weighted, because they are crucial points when it comes to omnichanneling. They offer a whole channel or a good option to shift between channels.

Being able to use the app of the retailer in-store for specific features and being able to scan products with a phone offer a new level of interaction between the phone and the store. This interaction is important to keep people entertained in-store. With the growing importance of the phone in modern lifestyle, the integration of the mobile phone into the buying process is a big part of omnichanneling. Therefore, we weighted those criteria with 3 points.

For the Online shop, free shipping and free returns seem to be important criteria for us. Only if there are no boundaries for hopping between online and offline channels, true omnichanneling can be achieved. This means, ordering an item online cannot cost more than it would in-store. Free shipping enables the customer to go through the buying process whatever way he wants, without having to think about higher costs depending on the channel he uses.

Free returns are more conflicting. They hurt the industry, since many people order a lot of items, even though they don't have the intention to keep them. Return rates, especially in Germany, are higher than ever. In fashion, about 50% of all the orders are being returned (Asdecker, 2015). However, for this index, we value free returns with 3 points because it gives the customer a better buying experience.

Omnichanneling is more than just giving a lot of different channels to the customer from which he can then choose which ones to use. It is also about giving a buying experience. Since this is the case, true omnichanneling needs to face the social aspect of the brand. Social networks like Facebook, Twitter, Instagram or an own fashion blog are opportunities for the retailers to connect with their customer. If retailers want to change their brand perception, deliver a brand personality or refresh the image of the brand, this is the way to do it.

The number of Touchpoints is important when looking at the Omnichannel capability of a retailer. Only if the customer can get in touch with the retailer in many ways, true

omnichanneling with seamless hopping between the channels can be achieved. Those touchpoints include the people in-store, FAQ's, support via phone, email, a newsletter, live chat, WhatsApp, availability 24/7, feedback for the retailer given by the customer or a webpage. Points are given depending on the number and quality of those touchpoints.

A physical store, an online shop or an App are touchpoints too, but are considered separate categories and therefore do not count into the score for this criterion.

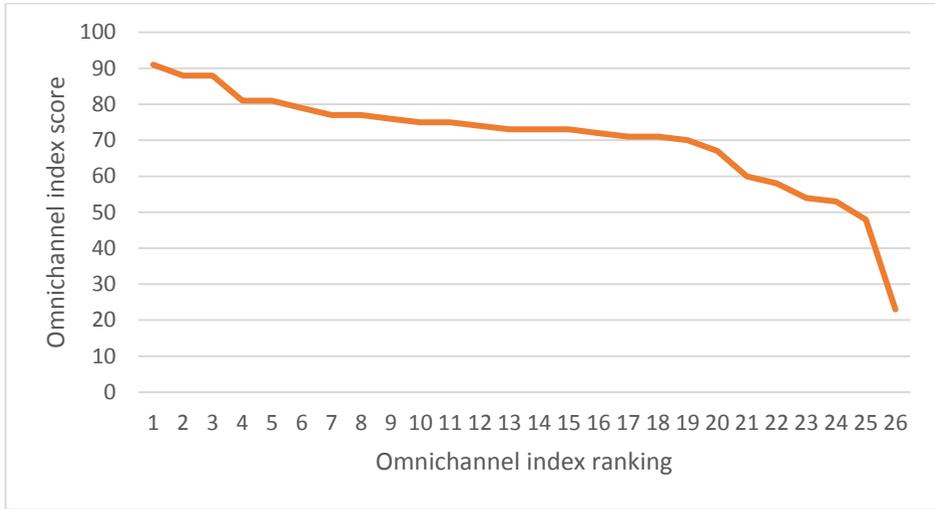
With 31 criteria, the index is diverse, precise enough and enables us to see the differences between the retailers. The categories Offline, Online, Mobile and Social Media cover all the aspects of omnichanneling and the separate criterion Touchpoints itself is an indicator how important omnichanneling is to the retailer. The distribution of the points is logical and the final score should give a good impression of how far omnichanneling is adopted by the researched retailers.

The maximum score to reach is 100, it makes it easy to compare the researched retailers and might enable us to give a percentage on how good the omnichannel capability is of the researched retailers. Whether the score of 100 can be reached will be shown as we apply our index to the retailers in the next chapter.

However, there are criteria that we did not integrate in our index. For example, we did not check whether the sales assistants in store offered counseling on additional items when we used the click&collect service. We also could not check whether the scanning in-store was fully functional, our information on this relies exclusively on online research.

3 Findings

The Fashion Omnichannel Index we created evaluates different retailers and combines offline, online, mobile, social media, and touchpoint criteria. The detailed list of the scores for every retailer in every criterion can be found in the appendix. Below, the ranking is presented in a table.



| Rank | Score | Retailer |
|------|-------|------------------------|
| 1 | 91 | Sears |
| 2 | 88 | Kohl's |
| 2 | 88 | Marks & Spencer |
| 4 | 81 | Macy's |
| 4 | 81 | Adidas |
| 6 | 79 | Esprit |
| 7 | 77 | Breuninger |
| 7 | 77 | Peek & Cloppenburg, D. |
| 9 | 76 | LVMH |
| 10 | 75 | Gap |
| 10 | 75 | Zara |
| 12 | 74 | H&M |
| 13 | 73 | Tommy Hilfiger |

| Rank | Score | Retailer |
|------|-------|------------|
| 13 | 73 | Otto Group |
| 13 | 73 | Nike |
| 16 | 72 | Bestseller |
| 17 | 71 | Hugo Boss |
| 17 | 71 | Puma |
| 19 | 70 | Karstadt |
| 20 | 67 | Burberry |
| 21 | 60 | C&A |
| 21 | 58 | Zalando |
| 23 | 54 | Armani |
| 24 | 53 | Dior Group |
| 25 | 48 | Calzedonia |
| 26 | 23 | New Yorker |

Figure 3 Omnichannel index rating chart and list

You could differentiate 'Omnichannel Excellent Performers' scoring more than 85, 'Omnichannel Performers' scoring more than 70 and 'Omnichannel High Potentials'.

Offline

Catalogue: We recognize three types of catalogues. On the one hand, you can use this tool to pursue advertisement, but on the other hand it can be used as a distribution channel. The third and most common catalogue is a mix of both. In this case H&M is the best in practice. As a customer with a customer account, you receive the newest collection regularly in form of a printed catalogue, which composes of professional photos and models and you get a product code which you can type in the app or online shop to buy it. In this criterion there is no least retailer, because of the high cost of printed catalogues many retailers renounce to spread out catalogues. But, like the Bestseller Group, some companies distribute catalogues on special events like Christmas.

Brick and mortar: The next criterion seems to be clear, but it is necessary to consider. For Brick and Mortar, every company has the full score but Zalando. Although Zalando has a few FOCs, they do not have a proper store.

Buy& deliver: The idea to buy in-store and deliver to home is a tool that is not yet popular for retailers. But it must be considered in the future. Customers who buy more than a few products, might not want to carry the bags all the way home. Plus, as shipping technologies are developed, shipping becomes faster and delivering it to home becomes more realistic. Best-in-practice in this category is Adidas and close to them on the second place is Dior. Both companies mention on their website, that it is possible to buy in-store and get it delivered to home. This criterion does not include shipping costs.

Wifi in-store: This is a necessary step to support the realization of a successful omnichanneling. If the customer should use the app in-store for instance, the retailer should make it as easy as possible to do so. Unfortunately, it is still uncommon to install public Wifi in the stores, Adidas, Nike, H&M and many more fail to offer it. But there are some exceptions, all American companies we evaluated offer Wifi in-store, also in Europe we found a few retailers with that offer, like Burberry, Luis Vuitton or Karstadt.

Order when out of stock: Another aspect for offline stores is the ability to order when the demanded product is out of stock. Quite often companies do not order such products from the logistic center, but from another location of the retailer. If that is

not possible, they order from their logistic center, which takes more time. This is how the best-in-practice would handle such a situation, which are almost all retailers from the United States, e.g. Marks and Spencer, Sears and Kohl's, and Gap, but also German companies like Adidas, Peek & Cloppenburg, Düsseldorf and Breuninger handle these situations very well.

Return in-store: To connect different distribution channels it should not play a role, whether you buy the product online or in-store. To undertake that, we wanted to find out, which companies offer to return an online shopped order in-store. Apparently, this category seems to be a challenge for some companies. Great names like Hugo Boss, Karstadt, Dior Group, Bestseller Group and many more do not offer this possibility for their customers. But H&M, Zara, P&C, Gap and a few more companies from our list have recognized, that to bring the customer in their stores to have a free return option can be a payable investment.

Online

Online Shop: First of all, to evaluate the next criteria in the category online shop, we had to check if an online shop exists. In this evaluation, only New Yorker has no online shop, they chose to use an online catalogue instead.

Payment options: A very important point of omnichanneling is to make it easier and more convenient for the customer to shop. Referring to that, the more ways to pay exist, the more customers have a good shopping experience. All in all, the most of our investigated companies offer more than four different payment options, Gap and Luis Vuitton only offer two different options.

Free shipping: To make online shopping worthwhile it is important to transfer it to something natural. The competition between online shops is too big to let customers click away. Armani, C&A and Karstadt do not accept to pay for the shipping, without exceptions the customer pays for the delivery. Many companies have a minimum value which customers must order to get free shipping. Before this cart value is reached, they have to pay for shipping. This method is very common and is used for example by Zara, Macy's, Gap, Adidas, Nike and many more. H&M has an interesting way to drive both ways. On first sight, they do not offer free shipping. But on their catalogues for customers who already bought something is a free-shipping code. We find this a good way to integrate different sales channels. Additionally, many

companies send free-shipping codes via newsletter to their customers in combination with special events. Of course, there are also companies who offer a free delivery from the very beginning, like Burberry, Luis Vuitton, Tommy Hilfiger, Zalando and Peek & Cloppenburg, Düsseldorf.

Free Returns: Subsequently we wanted to know, if the customer does not want bring it back to a store, would it be possible to send it back for free? We concern this criterion only on online shop goods, which are going to be sent back by mail. Worst-in-practice are the wholesalers from America Kohl's and Sears, but they give the alternative to bring the articles to their stores. Even though Calzedonia offers a free return, customers must expend an effort to do so. They have to log in their customer account, type in their order number and print it, instead of having it already in the package of the order. Every other company encloses a printed return tag into the order.

Click&Collect: If the retailers offer Click&Collect, meaning that the customer can order online and pick it up in the shop where he wants it shipped, they receive 5 points. For now, Click&Collect is a must-have to count as an omnichanneling company. But barely more than 50% of the companies we examined offer Click&Collect. Examples for retailers who offer Click&Collect are Zara, Peek & Cloppenburg, C&A and Breuninger, while H&M, Puma, Dior Group, Tommy Hilfiger and Calzedonia neglect to offer this service. Gap is an exception, where Click&Collect is not offered, but instead online customers are given the possibility to reserve a product in-store if it is available.



Figure 4 C&A shop window advertising Click&Collect

Related articles: Whether in-store or online, retailers want additional sales to make the sales check as big as possible. So, we investigated which of our examined companies present related articles to customers during the purchase process. Apparently, Puma does not want to enlarge the size of the check with this technique. As a company, you can choose out of three different kinds of articles. Either you offer products that the customers looked at the last times during shopping. Secondly, they could add variations to this kind of article the customer wants to buy or they present you totally different clothes, but in the same colors or style the customer is looking for. Exactly 50% of the examined companies present their customers two more kinds of products as we described above. These 50% composes of H&M, Zara, Peek& Cloppenburg, Breuninger, Hugo Boss and a few more. The other 13 companies apart of New Yorker and Puma offer only one kind of related articles.

Video for product presentation: It might sound irrelevant for those retailers who have offline stores, but in fact there is almost no brick and mortar store that has all collections and products a retailer offers. This makes it impossible for customers to touch and feel the products. Therefore, it is necessary to create an online shop, where

a customer feels like he is in-store as realistic as possible. One way to achieve this is to make a video and upload it into the online store, which is a kind of combination of the distribution channels on- and offline stores. Unfortunately, only Adidas, Gap and Luis Vuitton have videos for product presentation but even that just infrequent.

Filter results: They should simplify online shopping and it feels like a small effort to integrate this to the online shop. However, Luis Vuitton is the worst-in-practice. Whereas all 25 companies are aware of the problem that customers do not want to spend a lot of time for searching for a specific product, Luis Vuitton has two filters maximum.

Check availability: To connect the online and offline store even more companies can make the availability of a specific product transparent. For example, Adidas, Peek & Cloppenburg, Zara and Burberry and a few more of the examined companies offer by checking your zip code, if the considered product is available in the nearest store to the customer's home. Dior offers not the same service, you get the information that the product is available in-store, but not in which one.

Customer reviews: Less than the half of the companies have visible reviews on their online shops. However, all great American Retailers like Sears, Marks and Spencer, Kohl's, Macy's, Gap and partial brands like Nike have online customer reviews. But low-price retailers like H&M and Zara next to high-price brands like Luis Vuitton, Burberry, Armani and Dior do not have these reviews or ratings. Even major German fashion retailers like Peek& Cloppenburg or Breuninger do not use this tool.

Auto-complete for search: This criterion helps customers to find what they are searching for. Many online shops name their products differently, which makes it hard for the customer to find it in the proper way on different online shops. To give sales prospects a selection to choose makes it more comfortable for the customers, whether they are on a computer, tablet or mobile phone. The smaller the gadget, the more it helps. It is very simple to integrate into the shop, but seven companies out of 25 do not have it. These seven companies are Gap, Dior, C&A, Burberry, Calzedonia and Bestseller.

Wish list: Customers can use it as a shopping list. They search online for products which they want to buy, sometimes online but maybe in-store because of a real shopping experience and e.g. to check the fabric. It is a kind of precursor of

Click&Collect. Therefore, it supports not only one distribution channel. More than half of all companies we examined offer an online wish list, for example Peek& Cloppenburg, Hugo Boss, Adidas, Kohl's and Sears. The fast fashion brands H&M and Zara do not use this tool; Dior is the only luxury brand which does not use it.

Mobile

App: A very important new communication and sales channel for retailers and brands is to have an app which is working like an online shop. There are many advantages why a company should invest in something like that. But two of our companies do not have an app that is working like an online shop. New Yorker of course has no online shop, which makes the reason clear, but Armani has different kind of apps but no app to purchase goods. For example, one app of Armani connects Armani smart watches with a phone. There are three companies without any kind of apps, which are Dior, Burberry and Calzedonia.

App in-store: A further benefit of apps is that the customers can use it in-store to get more information about single products without any help from the sales assistants. Additionally, the customers can try it on in-store and order it via app, what saves time in a long queue at the point of sale. Many big retailers do use their apps in this way like Zara, Peek& Cloppenburg, Breuninger, Macy's, Kohl's, Sears and Marks and Spencer, but also brands like Luis Vuitton, Esprit, Bestseller and Tommy Hilfiger.

Online presentation of omnichanneling: The most of these companies use omnichannel tools, but do not communicate it to their customers. A good example for that is Zara. The online shop of Zara is very minimalistic and simple, but the result of that is that the customers have to search for service. A very good example for a good presentation of service is C&A with a very clear structure of their online shop (also see figure 2). Peek & Cloppenburg, Breuninger, Otto, Adidas and Nike have a clear structure and presentation of their omnichannel skills too. Worst-in-practice is Puma and Esprit. In both cases, we hardly got any information about delivery or their return policy. Customers might not want to spend that much time on getting information that should be easily accessible.

Ability to scan: An app can give general information about products, but it is more effective if you can scan the product in-store or anywhere else to get this information. Ten out of 26 companies have apps with the ability to scan products. These companies

are for example Zara, P&C, Luis Vuitton, Kohl's, Sears, Esprit, Bestseller and Tommy Hilfiger. The app of H&M can also scan a barcode, but just to get bonus points on the register.

Responsive Design: A very important point of simplifying omnichanneling is to adjust the mobile design of the webpage onto the screen of a mobile phone or tablet. In this criterion, every company reached the full score.

Customer Reviews mobile: This is a quite important information for every customer during the buying process. Customers should have the option to read reviews, whether they are at home on the computer or even in-store. So, of all companies who give the chance to read reviews of their products, three companies do not want to have this information in their app. Karstadt, Adidas and Nike do not show customer reviews on their app, but in their online shops. Retailers like Macy's, Kohl's, Sears, Marks and Spencer's and brands like Puma and Esprit give customers the chance to read them both ways.

Click to Call: The ability to call the company with one click improves the relation between company and customer. Regarding to omnichanneling it provides for a customer to get the same service as an online shopping customer at home. Apart of Zalando, Calzedonia, Tommy Hilfiger and New Yorker every examined company does offer this service.

Social

Blog: Another form of communication between customer and company in a more informal and thus more personal way. It is a channel of advertisement, which also improves the relationship between customer and the brand. More than three out of four companies have a Blog.

Facebook, Instagram, Twitter, others: These channels are quite important for the communication of sales promotions, events and to connect with consumers in general. For us, the first three social media channels are the most important of all and a must-have for every fashion retailer. The result from the Omnichannel Index reflects that very well, because every company is using at least the first three social media channels, besides Peek& Cloppenburg. P&C does not only miss Twitter, they do not have any social media channel beside Facebook and Instagram, which makes them

worst-in-practice. We also considered extra channels, because communicating with potential customers is important to get attention.

Communication

Touch points: Depending on how many touchpoints a retailer offers that a customer can get in touch with the retailer, we give up to 10 points, 1 point for each touchpoint a retailer offers. This criterion is built up by how the customers can get in touch with the company no matter what for. We see that as an important point because of the same reasons why omnichanneling itself becomes more and more important. Companies have to create a shopping experience no matter which way consumers want to interact with the retailer. The Otto group is best-in-class and has the most diverse ways to get in touch with their customers, no matter if they want to give a feedback, call or chat with the retailer.

Discussion

The first thing to come to eye from this Omnichannel Index is that American retailers are the leader in the terms of omnichanneling. Among the top 5 companies we examined are three American companies, what underlines this fact. One reason for this result is that they do not concentrate on one distribution channel but take chances to generate more revenue. For example, Macy's, Sears and Kohl's have all free Wifi in their stores, which improves their online activity and build this connection between these two distribution channels. They have taken risks and invested a lot into their omnichannel activities. This has lead them to the top of our ranking, but our first place, Sears, is still experiencing a hard time. Even though Sears seems to offer a great service, "the company's shares have been down close to 40 percent" (Mourdoukoutas, 2016) in 2016 compared to the previous year. This shows that focusing on omnichanneling alone will not guarantee success in the future.

Although it is sometimes difficult to gather the information about it, omnichannel activities are still discernable in Europe. The criterion which is meant by most people when omnichanneling is debated is Click&Collect. Our Omnichannel Index proofs that more than 60% of the examined companies use this omnichanneling tool, which yet is a connection between the two biggest distribution channels: Online shop and brick and mortar. Another aspect is the dispose of an app and the function to use in-store, which again combines the two main channels online and offline. According to our

index, every of these retailers has an app and more than 50% dispose of the function to use it in their stores.

But a big problem is that the most fashion companies do not communicate their omnichannel skills to the customers, which lowers the feedback frequency of the customers and purport that omnichanneling itself will not be the future solution in the fashion market. Less than the half of all companies we examined have the full score in the criterion ‘Online presentation of omnichanneling’. ServiceAtlas Fashion-Shops 2014 confirms that 72% of the interviewed persons prefer to check the availability of a specific product online before going in-store. This criterion was also considered in our Omnichannel Index. Additionally, 73% of those people would like to return their online order in-store. (servicevalue.de, 2016)

After analyzing the 26 retailers and evaluating our outcomes, we say it is measurable how much a company uses this modern way of working. We confronted customer expectations with the retailer’s effort to satisfy the demands and measured how well the retailers perform.

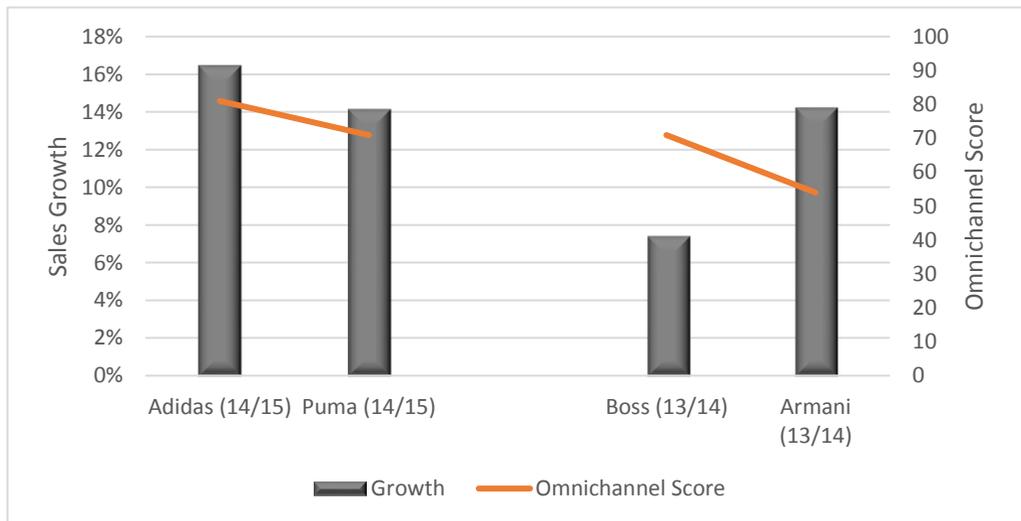


Figure 5 Comparing sales growth with Omnichannel score

If Omnichanneling is affecting the success of a retailer directly, we should be able to see a clear connection between the sales growth and the Omnichannel Score of a retailer. But chart 1 shows that this conclusion is incorrect. We chose to compare Adidas with Puma and Hugo Boss with Armani because they act in similar markets. For Adidas with an Omnichannel Score of 81 and Puma with a score of 71 the theory is true, Adidas' sales grew with about 16% between 2014 and 2015 while Puma's sales grew only about 14%. But if we look at Hugo Boss, who has a Omnichannel Score of 71 compared to Armani with a score of only 54, we see that Armani has significantly higher sales growth in the years 2013 to 2014.

This means that we can't state that a higher Omnichannel Score will lead to a higher sales growth. This is because the sales are affected by too many factors than omnichanneling. However, this does not say that omnichanneling is irrelevant for the sales growth, it just states that its effect on the sales growth is blurred by the other factors. The Omnichannel Index can't predict future sales, nor can it be considered as the standalone guide for the future. Companies must recognize the importance of this issue, but in the same time do not disregard other topics.

4 Outlook

This research does not only recognize the present state of omnichanneling in the fashion market, it does also take an approach on a look into the future. Omnichanneling is new to the fashion market, a market that has been stagnating for several years. Many retailers are overstrained by the challenge to connect online and offline sales channels, but if we take other markets into consideration, for example the department stores or the automobile market, we see that omnichanneling is not as brand new as some retailers might think. The challenge for fashion retailers is to identify the important aspects of omnichanneling and put them into practice in the best way possible. We find it is important to on the one hand emphasize the importance of omnichanneling, but on the other hand it also raises questions on the importance of some aspects in Omnichannel Retailing.

As Dr. Stephan Fanderl, CEO of Karstadt says, Omnichannel will play "a very important role" (Fanderl, 2016) in the future. Karstadt "invested a lot into the digitalization of

the company” (Fanderl, 2016). However, in our ranking, Karstadt ends up with an average Omnichannel score of 70 points. This example shows that Karstadt does prepare for the future in terms of digitalization, but it seems that they do not intend to cover every aspect of omnichanneling.

Omnichanneling will not be a big topic for fashion retailers in the future like it is today, since many aspects of it will become the new normal. Retailers who fail to offer the same range of products online and offline will lose attractiveness. As shipping becomes faster and faster, along with new technologies like drones and self-driving cars, buy & ship to home will be self-evident. To “deliver to the customers within hours” (Hahn, 2016) is the goal of Moritz Hahn, Senior Vice President of Zalando.

But not every aspect might be crucial for stationary retailers. It is not important to have every social media page filled with content, retailers will survive even if they have not a printed catalog. Online customer reviews are nice to have, but will not decide over the future of a retailer. Therefore, it is important to deliberate whether an aspect is important for a retailer or not. It is not about getting a 100 Omnichannel Score, it is about giving a full brand experience that just fits and works. This is highly subjective and every retailer must decide for their own how and when they want to realize this.

In the stationary store in the future there might be extended shelves, tablets which show additional or sold out items that are not present at the store. Our mobile phone may become our shopping cart as we just scan the product and it will be delivered to our home right away. With new technologies evolving every day, the stationary store of tomorrow may look completely different than we expect it to look like, but we are certain that many criteria of our Omnichannel Index will be a standard for the future retailers.

Pure Online players like Zalando face less challenges than stationary retailers, since they do not need to align their offline to their online channels or train their employees and have a central distribution of their goods compared to the stationary retailers with many small stores with their own warehouses. But the stores in downtown will still not disappear. We as humans prefer to see, feel and try on what we buy. We like the experience when we go out shopping, it is not just about getting new clothes.

But only those stationary retailers who go with the time and evolve will still be alive in ten or twenty years. Customers get more and more demanding, retailers who deny to fulfill these demands will be troubled in the future. Omnichanneling will not be recognized as offering something special, it will be about keeping up with the standard of the global fashion market.

We realize the challenges of Omnichannel retailing and the scale of investments that are needed to make it work, but in the end, there is no way around it. The changes happening in the companies are long overdue and will give the fashion market a fresh makeover. Our Omnichannel Index shows where retailers need to improve themselves. Even though omnichanneling alone will not decide whether a retailer will be successful in the future or not, it should be a big part of the five-year-strategy of every retailer.

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6 Appendix

| Maximum Score | 10 | 3 | 3 | 3 | 3 | 5 | 2 | 2 |
|------------------------|-------------|-----------------|---------------|--------------|---------------|------------------|--------------------------------|---|
| | ONLINE | | | | | | | |
| Retailers | Online Shop | Payment options | Free shipping | free returns | Click&collect | related articles | Video for product presentation | |
| Sears | 10 | 3 | 2 | 0 | 2 | 5 | 0 | |
| Kohl's | 10 | 3 | 2 | 0 | 2 | 5 | 0 | |
| Marks and Spencer | 10 | 2 | 2 | 3 | 1 | 5 | 0 | |
| Macy's | 10 | 2 | 2 | 3 | 1 | 5 | 0 | |
| Adidas | 10 | 3 | 2 | 3 | 0 | 5 | 1 | |
| Esprit | 10 | 3 | 1 | 3 | 2 | 5 | 0 | |
| Breuninger | 10 | 3 | 2 | 3 | 5 | 2 | 0 | |
| Peek & Cloppenburg, D. | 10 | 3 | 3 | 3 | 2 | 5 | 0 | |
| LVMH | 10 | 1 | 3 | 3 | 1 | 5 | 1 | |
| Gap | 10 | 1 | 2 | 3 | 2 | 3 | 1 | |
| Zara | 10 | 3 | 2 | 3 | 2 | 5 | 0 | |
| H&M | 10 | 3 | 1 | 3 | 2 | 0 | 0 | |
| Tommy Hilfiger | 10 | 2 | 3 | 3 | 2 | 0 | 0 | |
| Otto Group | 10 | 3 | 1 | 3 | 2 | 0 | 0 | |
| Nike | 10 | 3 | 2 | 3 | 1 | 5 | 0 | |
| Bestseller | 10 | 3 | 1 | 3 | 1 | 5 | 0 | |
| Hugo Boss | 10 | 3 | 3 | 3 | 2 | 5 | 0 | |
| Puma | 10 | 2 | 1 | 3 | 0 | 0 | 0 | |
| Karstadt | 10 | 3 | 0 | 1 | 1 | 5 | 0 | |
| Burberry | 10 | 3 | 3 | 3 | 1 | 5 | 0 | |
| C&A | 10 | 3 | 0 | 3 | 2 | 5 | 0 | |
| Zalando | 10 | 2 | 3 | 3 | 2 | 0 | 0 | |
| Armani | 10 | 3 | 0 | 3 | 1 | 0 | 0 | |
| Dior Group | 10 | 2 | 3 | 3 | 1 | 0 | 0 | |
| Calzedonia | 10 | 3 | 1 | 1 | 1 | 0 | 0 | |
| New Yorker | 0 | 0 | 0 | 0 | 0 | 0 | 0 | |

| Maximum Score | 5 | 10 | 2 | 2 | 2 | 3 |
|------------------------|----------------|------------------|---------------------|---------------|-------------------------|-----------------|
| | OFFLINE | | | | | |
| Retailers | Catalogue | Brick and Mortar | Buy&deliver to home | Wifi in-store | Order when out of stock | Return in-store |
| Sears | 5 | 10 | 1 | 2 | 2 | 3 |
| Kohl's | 5 | 10 | 0 | 2 | 2 | 3 |
| Marks and Spencer | 5 | 10 | 1 | 1 | 2 | 1 |
| Macy's | 5 | 10 | 1 | 2 | 1 | 2 |
| Adidas | 0 | 10 | 2 | 1 | 2 | 2 |
| Esprit | 0 | 10 | 0 | 0 | 1 | 0 |
| Breuninger | 5 | 10 | 0 | 1 | 1 | 3 |
| Peek & Cloppenburg, D. | 0 | 10 | 0 | 1 | 2 | 3 |
| LVMH | 0 | 10 | 1 | 2 | 1 | 3 |
| Gap | 0 | 10 | 0 | 2 | 1 | 3 |
| Zara | 0 | 10 | 0 | 0 | 1 | 3 |
| H&M | 5 | 10 | 0 | 1 | 0 | 3 |
| Tommy Hilfiger | 3 | 10 | 0 | 2 | 2 | 0 |
| Otto Group | 5 | 10 | 0 | 0 | 0 | 0 |
| Nike | 0 | 10 | 1 | 1 | 2 | 3 |
| Bestseller | 3 | 10 | 0 | 0 | 2 | 0 |
| Hugo Boss | 0 | 10 | 0 | 1 | 2 | 0 |
| Puma | 5 | 10 | 0 | 1 | 2 | 2 |
| Karstadt | 5 | 10 | 0 | 2 | 1 | 0 |
| Burberry | 0 | 10 | 1 | 2 | 2 | 3 |
| C&A | 5 | 10 | 0 | 0 | 0 | 2 |
| Zalando | 0 | 5 | 0 | 0 | 0 | 0 |
| Armani | 1 | 10 | 0 | 2 | 2 | 0 |
| Dior Group | 0 | 10 | 2 | 0 | 1 | 0 |
| Calzedonia | 5 | 10 | 0 | 0 | 0 | 0 |
| New Yorker | 0 | 10 | 0 | 0 | 0 | 0 |

| Maximum Score | 2 | 2 | 2 | 2 | 1 | 1 | 1 | 2 |
|------------------------|----------------|--------------------|------------------|--------------------------|----------|--------------------------------|---|---|
| | Filter results | | | | | | | |
| Retailers | Filter results | Check availability | Customer reviews | Auto-Complete for search | Wishlist | Presentation of omnichanneling | | |
| Sears | 2 | 2 | 2 | 1 | 1 | 10 | | |
| Kohl's | 2 | 2 | 2 | 1 | 1 | 10 | | |
| Marks and Spencer | 2 | 2 | 2 | 1 | 0 | 10 | | |
| Macy's | 2 | 0 | 2 | 1 | 0 | 10 | | |
| Adidas | 2 | 2 | 2 | 1 | 1 | 10 | | |
| Esprit | 2 | 2 | 2 | 1 | 1 | 10 | | |
| Breuninger | 2 | 0 | 0 | 1 | 0 | 2 | | |
| Peek & Cloppenburg, D. | 2 | 2 | 0 | 1 | 1 | 10 | | |
| LVMH | 1 | 0 | 0 | 1 | 1 | 10 | | |
| Gap | 2 | 2 | 0 | 0 | 1 | 10 | | |
| Zara | 2 | 2 | 0 | 1 | 0 | 10 | | |
| H&M | 2 | 0 | 0 | 1 | 0 | 10 | | |
| Tommy Hilfiger | 2 | 0 | 0 | 1 | 0 | 10 | | |
| Otto Group | 2 | 0 | 2 | 1 | 1 | 10 | | |
| Nike | 2 | 0 | 2 | 1 | 1 | 10 | | |
| Bestseller | 2 | 0 | 0 | 0 | 0 | 10 | | |
| Hugo Boss | 2 | 2 | 0 | 1 | 1 | 10 | | |
| Puma | 2 | 0 | 2 | 1 | 1 | 10 | | |
| Karstadt | 2 | 2 | 1 | 1 | 1 | 10 | | |
| Burberry | 2 | 2 | 0 | 0 | 1 | 0 | | |
| C&A | 2 | 0 | 0 | 0 | 1 | 0 | | |
| Zalando | 2 | 0 | 2 | 1 | 1 | 10 | | |
| Armani | 2 | 0 | 0 | 1 | 1 | 5 | | |
| Dior Group | 2 | 1 | 0 | 0 | 0 | 0 | | |
| Calzedonia | 2 | 0 | 0 | 0 | 1 | 0 | | |
| New Yorker | 0 | 0 | 0 | 0 | 0 | 5 | | |

| Maximum Score | 10 | 3 | 3 | 3 | 2 | 2 | 1 |
|------------------------|-----|--------------|-----------------|-------------------|------------------|---------------|---|
| MOBILE | | | | | | | |
| Retailers | App | App In-store | Ability to scan | Responsive Design | Customer Reviews | Click to Call | |
| Sears | 3 | 2 | 3 | 2 | 2 | 1 | |
| Kohl's | 3 | 2 | 3 | 2 | 2 | 1 | |
| Marks and Spencer | 3 | 2 | 2 | 2 | 2 | 1 | |
| Macy's | 3 | 1 | 1 | 2 | 2 | 1 | |
| Adidas | 0 | 2 | 1 | 2 | 0 | 1 | |
| Esprit | 3 | 0 | 3 | 2 | 2 | 1 | |
| Breuninger | 10 | 3 | 0 | 2 | 0 | 1 | |
| Peek & Cloppenburg, D. | 3 | 2 | 3 | 2 | 0 | 1 | |
| LVMH | 3 | 1 | 3 | 2 | 0 | 0 | |
| Gap | 3 | 1 | 3 | 2 | 0 | 1 | |
| Zara | 3 | 0 | 3 | 2 | 0 | 1 | |
| H&M | 3 | 1 | 2 | 2 | 0 | 1 | |
| Tommy Hilffiger | 3 | 1 | 3 | 2 | 0 | 0 | |
| Otto Group | 0 | 2 | 0 | 2 | 2 | 1 | |
| Nike | 0 | 2 | 0 | 2 | 0 | 1 | |
| Bestseller | 3 | 1 | 3 | 2 | 0 | 1 | |
| Hugo Boss | 0 | 1 | 0 | 2 | 0 | 1 | |
| Puma | 2 | 0 | 1 | 2 | 2 | 1 | |
| Karstadt | 0 | 2 | 0 | 2 | 0 | 1 | |
| Burberry | 0 | 2 | 0 | 2 | 0 | 1 | |
| C&A | 0 | 2 | 0 | 2 | 0 | 1 | |
| Zalando | 0 | 1 | 0 | 2 | 2 | 0 | |
| Armani | 0 | 0 | 0 | 2 | 0 | 0 | |
| Dior Group | 0 | 1 | 0 | 2 | 0 | 1 | |
| Caizodonia | 0 | 1 | 0 | 2 | 0 | 0 | |
| New Yorker | 0 | 0 | 0 | 2 | 0 | 0 | |

| Maximum Score | 1 | 1 | 1 | 1 | 1 | 3 | 10 | | |
|------------------------|--------|----------|-----------|---------|-------|--------------|---------------|------------------------|--|
| | SOCIAL | | | | | | Communication | Total | |
| Retailers | Blog | Facebook | Instagram | Twitter | Other | Touch points | | Retailers | |
| Sears | 1 | 1 | 1 | 1 | 3 | 8 | 100 | Sears | |
| Kohl's | 0 | 1 | 1 | 1 | 3 | 7 | 88 | Kohl's | |
| Marks and Spencer | 1 | 1 | 1 | 1 | 3 | 9 | 88 | Marks and Spencer | |
| Macy's | 1 | 1 | 1 | 1 | 1 | 7 | 81 | Macy's | |
| Adidas | 1 | 1 | 1 | 1 | 3 | 9 | 81 | Adidas | |
| Esprit | 1 | 1 | 1 | 1 | 3 | 8 | 79 | Esprit | |
| Breuninger | 1 | 1 | 1 | 1 | 1 | 6 | 77 | Breuninger | |
| Peek & Cloppenburg, D. | 0 | 1 | 1 | 0 | 0 | 6 | 77 | Peek & Cloppenburg, D. | |
| LVMH | 1 | 1 | 1 | 1 | 3 | 6 | 76 | LVMH | |
| Gap | 1 | 1 | 1 | 1 | 2 | 6 | 75 | Gap | |
| Zara | 0 | 1 | 1 | 1 | 1 | 8 | 75 | Zara | |
| H&M | 1 | 1 | 1 | 1 | 2 | 8 | 74 | H&M | |
| Tommy Hilfiger | 1 | 1 | 1 | 1 | 3 | 7 | 73 | Tommy Hilfiger | |
| Otto Group | 1 | 1 | 1 | 1 | 2 | 10 | 73 | Otto Group | |
| Nike | 1 | 1 | 1 | 1 | 0 | 7 | 73 | Nike | |
| Bestseller | 1 | 1 | 1 | 1 | 3 | 5 | 72 | Bestseller | |
| Hugo Boss | 0 | 1 | 1 | 1 | 2 | 7 | 71 | Hugo Boss | |
| Puma | 0 | 1 | 1 | 1 | 2 | 6 | 71 | Puma | |
| Karstadt | 0 | 1 | 1 | 1 | 0 | 7 | 70 | Karstadt | |
| Burberry | 1 | 1 | 1 | 1 | 3 | 7 | 67 | Burberry | |
| C&A | 1 | 1 | 1 | 1 | 3 | 5 | 60 | C&A | |
| Zalando | 1 | 1 | 1 | 1 | 3 | 5 | 58 | Zalando | |
| Armani | 1 | 1 | 1 | 1 | 3 | 4 | 54 | Armani | |
| Dior Group | 1 | 1 | 1 | 1 | 3 | 7 | 53 | Dior Group | |
| Calzedonia | 1 | 1 | 1 | 1 | 3 | 4 | 48 | Calzedonia | |
| New Yorker | 1 | 1 | 1 | 1 | 1 | 1 | 23 | New Yorker | |

Figure 6 Detailed Fashion Omnichannel Index score sheets