Localised multiple channel distribution strategies of luxury fashion retailers – Evidence from China

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Abstract

This empirical study aims to examine luxury fashion retailers' localised multiple channel distribution strategies in China. Through case studies of fifteen participating retailers, qualitative data was collected from thirty-three semi-structured interviews. Strong impacts of internationalisation strategies, distribution strategies and channel length towards multiple channel retailing are revealed. Multi-channel retailing is widely employed by firms who have entered China and further developed their businesses through local partnerships and adopted a selective distribution strategy via relatively longer channels. Omni-channel retailing is only suitable for the few retailers using an exclusive distribution strategy through direct marketing and wholly-owned customer relationship management. As a dynamic transformation from multi- to omni-channel retailing, cross-channel retailing is adopted by those who are withdrawing from local partnerships and shifting to wholly-owned expansions and operations in host markets. This paper contributes to the literature in both multiple channel retailing and international retailing by offering insights into the motives, development patterns, and suitability of multiple channel retailing in the international retail marketing context.

Keywords

Luxury fashion retailing, Distribution strategies, Channel length, Multi-channel, Omni-channel

Funding

1. Introduction

In recent times fast-moving consumer lifestyles, particularly online shopping and communication, have driven luxury fashion retailers to adopt multiple channel distribution strategies to obtain sustainable success (Lynch and Barnes, 2020). Meanwhile, multiple channel retailing has become an important research field. Scholars have focused on a series of research topics, such as motives and development patterns (Eyuboglu *et al*., 2017), service quality across channels (Zhang *et al*., 2022), channel integration (Cao and Li, 2015), customer complain and loyalty (Frasquet *et al*., 2015; Frasquet *et al*., 2019), and comparison of various multiple channel distribution strategies (Yrjölä *et al*., 2018).

Among the three multiple channel distribution strategies (Beck and Rygl, 2015), researchers have focused on omni-channel retailing. For example, Verhoef (2021) argues that omni-channel retailing is expected to become the future of multiple channel distribution strategies because of its capacity to offer a constant and seamless brand experience and added consumer value. Nevertheless, establishing omni-channel retailing is not feasible for all luxury fashion retailers due to insufficient marketing knowledge, supply chain and logistics infrastructure, and organisational management (Ye *et al*., 2018).

Despite the contributions of existing literature, the following areas remain underdeveloped. Firstly, the existing studies neglect retailers' different branding strategies. Despite consumers' desire to shop online, some French luxury fashion retailers such as Chanel and Goyard are still reluctant to distribute their core products through e-commerce, as they wish to maintain their brands' rarity and combat counterfeits via strict limits on distribution (Bai *et al*., 2018). Therefore, luxury fashion retailers need to adopt different multiple channel distribution strategies from mass-market fashion retailers (Guercini and Milanesi, 2017).

Secondly, prior studies focus on retailers' internal characteristics and underestimate the external market environment (Carpenter *et al*., 2013). Through examining omni-channel distribution strategies of six retail sectors in terms of retailer actions and micro-foundations during the COVID-19 pandemic, Cocco and De-Juan-Vigaray (2022) develop a typology of strategic retailer activities and customer responses including omni-channel strategy, misaligned firm delivery and customer expectations within channel experience, omni-channel logistics and fulfillment, and omni-channel marketing. However, retailers' business activities and

development can be different between in home and host markets (Moore *et al*., 2010). To minimise perceived psychic distance, luxury fashion retailers often adapt their distribution strategies to overcome barriers in host markets (Lopez and Fan, 2009).

Thirdly, very few study has examined luxury fashion retailers' multiple channel distribution strategies from a retailer internationalisation perspective, especially there is a lack of consideration of distribution strategies and channel length in a foreign market (Bai and McColl, 2023). Prior studies have examined some factors of luxury fashion retailers' business development after their initial entry into the host market, such as motives (Bai *et al*., 2021), market selection (Bai *et al*., 2021), adapted communication and product strategies (Liu *et al*., 2016; Bai *et al*., 2022). However, the understanding of localised multiple channel distribution strategies remains insufficient (Bai, 2018).

This exploratory research aims to shed light on luxury fashion retailers' localised multiple channel distribution strategies in China, where remains vital for international luxury fashion retail sector (Kapferer and Valette-Florence, 2022). Indeed, luxury fashion consumption in China sharply increased by 48% (mainly online) due to the global lockdown and restrictions on international travel caused by COVID-19 pandemic in 2020, when the global fashion market shrank by over 90% (McKinsey, 2021). Reuters (2020) reports there are almost one billion active internet users in China, which accounts for over 70% of the total population. More specifically, this paper helps to understand the following research questions:

- *Why have luxury fashion retailers adopted multiple channel retailing in China?*;
- *How have they developed their multiple channel distribution strategies?*; and
- *Which multiple channel distribution strategy is most appropriate for their post-entry business development in China?*

Next section evaluates the current literature on luxury fashion retailers' distribution strategies, channel length, and multiple channel retailing. After justifying the methodology and research design, the results will be presented and discussed. The paper concludes by identifying its limitations and suggesting future research.

2. Literature review

2.1 Distribution strategies and channel length of luxury fashion retailers

Moore *et al*. (2010) identify two types of distribution strategies and channel lengths adopted by luxury fashion retailers. On the one hand, they export and wholesale their products to wholesalers, high-end department stores and specialist luxury fashion chains, such as Selfridges and Flannels. In doing so selective distribution strategies are employed, which help to extend distribution via other retailers' networks. The channel length is relatively longer, as it involves luxury fashion brands, wholesalers, distribution retailers, and consumers. On the other hand, exclusive distribution strategies are employed through direct marketing to concessions in luxury department stores and standalone stores in premium districts. Due to directly owning their customer relationship malmanagement system (i.e., the database that helps firms understanding and managing interactions with target consumers, hereafter CRM) and own brands, direct marketing is more efficient and effective because of short channel length (McColl and Moore, 2011).

Despite this contribution, their findings were generated from the UK, and are limited in explaining emerging markets because of different market infrastructures. For example, Bai *et al*. (2018) identify that exclusive distribution strategies with shorter channel lengths are more appropriate in China. Moreover, Moore *et al.* (2010) is limited to explain present e-/m-commerce and multiple channel retailing (Wood *et al*., 2021). Indeed, during market disruption such as the COVID-19 pandemic, omni-channel retailing encouraged luxury fashion retailers to develop direct marketing (Wang and Jiang, 2022).

2.2 Multiple channel retailing in luxury fashion sector

Researchers suggest understanding retailers' multiple channel distribution strategies from a relatively comprehensive and dynamic perspective, including motives, development patterns, and operations (Galipoglu *et al*., 2018; Cocco and De-Junan-Vigaray, 2022). These factors are responded by the research questions of present study.

Indeed, understanding the motives behind retailers' multiple channel distribution strategies helps to understand their intrinsic conditions, their capabilities and their reaction to the changing market environment (Bogdan and Gotwald, 2022). The existing literature, such

as Beck and Rygl (2015), reveals that the most important motive behind retailers' multiple channel distribution strategies is consumers' willingness to shop across various channels. Similarly, Vyt *et al*. (2022) recognise that *click-and-collect* services and consumers' desire to return online purchases to brick-and-mortar stores have led retailers to integrate channels, either partially or fully. Moreover, existing studies identify that most retailers developed multiple channel distribution strategies from offline channels such as physical stores, to online channels, particularly official e-commerce sites (Zhang *et al*., 2018; Karim and Qi, 2021). Nevertheless, the majority of prior studies neglect the radical differences between generic retailers and luxury fashion retailers in terms branding strategies, marketing positioning, distribution strategies and channel length (Liu *et al*., 2016; Ye *et al*., 2018; Kapferer and Valette-Florence, 2022).

Prior studies explore the operational details and characteristics of the three kinds of multiple channel retailing, those of multi-, cross-, and omni-channel retailing (Verhoef *et al*., 2015; Thaichon *et al*., 2022). As cross-channel retailing is set between multi- and omni-channel retailing (Beck and Rygl, 2015), the characteristics of cross-channel retailing can be understood through evaluating the advantages and challenges of multi- and omni-channel retailing as two extremes (Table 1).

Table 1: Comparison between multi- and omni-channel retailing

	Multi-channel	Omni-channel
Aim	- Reach as many consumers as possible by maximum numbers of channels - Additional channel coexists with the dominant channels	- Interactive and mass communication channels - All channels are integrated to form a unique and seamless brand experience
Market focus	- Sales focused	- Brand and product feature focused
Operation	- Operate channels as independent entities	- Integrate all channels - Interact within channel mix
Channel integration	- No integration between channels	- Full integration - Consistency and engagement
Channel scope	- Relatively limited channels - Add more channels if possible	- Diverse channels - Optimise (add or reduce) channels
Channel objective	- Sales and experiences per channel	- Overall (seamless) brand experience - Total sales over channel mix
Competition	- Cannibalisation of sales - Internal competition	- Embracing sales and market competition

Adapted from: Verhoef *et al*. (2015); Yrjölä *et al*. (2018); Bai and McColl (2023)

Multi-channel retailing helps retailers to reach as many consumers as possible via a maximal number of channels (van Baal, 2014). Because adding an additional channel requires considerable investment and human resource, finance, and logistics expertise, retailers adopt relatively limited numbers and types of channels, such as brick-and-mortar stores and official e-commerce (Karim and Qi, 2021). These channels are managed and operated separately without integration, meaning that shared CRM between channels is absent (Acquila-Natale and Iglesias-Pradas, 2020). For example, different channels may target different consumers through various price, product portfolio, services, and communication mixes (Bressolles and Lang, 2020). Therefore, consumers' experiences with the same retailer could differ across channels (Ishfaq and Bajwa, 2019). Meanwhile, because it is sales focused, each channel has its own sales target. This could lead to the cannibalisation of sales between channels, and then to potential internal competition (Hübner *et al*., 2015).

In contrast, omni-channel retailing aims to create and maintain a unique, constant, and seamless brand experience via full integration between channels (Galipoglu *et al., 2018*). Retailers optimise the channel mix by adding or reducing channels to ensure an efficient and effective collaboration between channels (Gang *et al*., 2020). Under this strategy, the channel mix is made up of diverse channels, including physical stores, e-commerce, and social media (Cao *et al*., 2015). Since this strategy targets consumers via the channel mix, there is consistency in terms of price, product mix, communication content, and after-sale services. Moreover, the sales target of this strategy is for total sales across the channel mix (Thaichon *et al*., 2022). It has become more important for market recovery post the COVID-19 pandemic (Wang *et al*., 2023).

All channels are therefore required to collaborate and share information via regular internal communications, such as a globally shared CRM. Further, omni-channel retailing embraces sales and market competition because it is brand- and product-feature-focused (Rodriguez-Torrico *et al*., 2020). Despite the capacity to offer a seamless brand experience, prior studies have identified a series of challenges facing omni-channel retailing, such as e-fulfillment (Davis-Sramek *et al*., 2020), the integration of channels (Zhang *et al*., 2018), consistent CRM across channels (Frasquet *et al*., 2019), and synergies between activities within omni-channel retailing (Cocco and De-Juan-Vigaray, 2022).

Lying between multi- and omni-channel retailing, retailers can also partially integrate channels via a cross-channel distribution strategy, which meets consumers' wish for partial interaction between channels (Beck and Rygl, 2015). Through this strategy, product, price, customer information, and after-sales services can be shared and made accessible between several channels, but not all. Verhoef (2021) argues that many traditional retailers who have developed multiple channel distribution strategies from offline to online are keen to adopt this strategy. Further, from a dynamic perspective, some scholars suggested that cross-channel retailing is the transformation from multi- to omni-channel retailing to strengthen long-term customer relationships and satisfaction (Thaichon *et al*., 2022).

In summary, although prior studies have contributed understanding and classification of the three kinds of multiple channel retailing outline above, the suitability of multiple channel distribution strategies for luxury fashion retailers' post-entry expansion and operations in host markets remains unknown (Bai and McColl, 2023). In particular, the impact of international distribution strategies and channel length on multiple channel retailing in host markets is underdeveloped.

2.3 China's Luxury fashion market

Some characteristics of the China's luxury fashion market are identified from extant literature (Kapferer and Valette-Florence, 2022; Zhang et al., 2022). Firstly, China along with Hong Kong is a collectivist culture which is unique from other emerging markets such as Brazil, India and Russia (Bai *et al*., 2018). Secondly, internal differences amongst cities and their level of economic development, urbanisation and social-cultural help to create more fine-grained differences in terms of attracting investments and new area where located stores. In this regard, Liu *et al*. (2016) suggest that luxury fashion retailers differentiating their communication strategies between tier-1 national capitals (i.e. Beijing, Shanghai *etc.*), tier-2 regional capitals (i.e. Chengdu, Qingdao *etc.*), and tier-3 non-capital cities (i.e. Taiyuan, Nanning *etc.*). What is more, development of technology, logistics and market infrastructure are considerably distinct amongst regions and cities. These differences allow for variegate store density, store layout (e.g., brick-and-mortar stores and e-commerce), and delivery cost (Ye *et al*., 2018). Ultimately, digital innovations are contributing China's retail penetration more than other countries with a

pervasive usage of e-commercial platforms (i.e., JD.com, T-mall) and social media (i.e., WeChat) (Bai and McColl, 2023). The following three research propositions (RP) are proposed:

RP1: Luxury fashion retailers' multiple channel distribution strategies in China are not only motivated by the reactive factors;

RP2: Luxury fashion retailers develop their multiple channel distribution strategies in China from offline to online;

RP3: A multiple channel distribution strategy is not feasible and suitable for all luxury fashion retailers in China.

3. Methodology

The authors regarded interpretivist multi-case study research as most appropriate in methodological terms. Firstly, case study research explores how, what, and why questions in relation to luxury fashion retailers' development of localised multiple channel distribution strategies after their initial entry into China (Liu *et al*., 2016; Bai *et al*., 2022). Such questions have not been fully researched before. Secondly, case study research helps researchers' understanding of ongoing situations, particularly where multifaceted and complex issues are involved (Creswell and Creswell, 2018). Specifically, the use of multi-case study research ensures that researchers can analyse the data for each case and allows them to compare across cases to gain in-depth insight into the differences and similarities between the cases (Yin, 2018). Thirdly, because the analysis of multi-case studies allows for the comparison of various sources of information, it minimises subjective bias and strengthens the validity of the research findings (O'Kane *et al*., 2021).

The number of potential participants for this study is limited to individuals meeting the eligibility criteria. These are the possession of extensive experience and a comprehensive understanding of luxury fashion retailer marketing and operational expansion in China (Etikan and Bala, 2017). The sample was drawn from three sources: 1) the directories of the top ten luxury malls across China; 2) members of globally reputable luxury committees including the Council of Fashion Designers of America (US), the Comite Colbert (France), the British Council of Fashion and Walpole (UK), and the Fondazione Altagamma (Italy); and 3) the directories of Chinese e-commercial platforms (JD.com, and Tmall.com.) and social media

(WeChat, Sina Weibo, and Little Redbook).

To ensure sufficient operational and strategic experience and to increase the validity of the results, 63 of 105 luxury fashion retailers were assessed and were selected as a suitable target sample based on meeting the criteria that they a) had a minimum of five years of operations and experience in at least two channels (across both offline and online), and b) originated from foreign countries. In May of 2018, the covering letter was sent to the 63 target retailers. By late August 2018, fifteen luxury fashion retailers (Table 2) had agreed to participate, a participation rate of 24%, which can be regarded as a good response rate for the research topic (Yin, 2018).

Table 2: Profile of the participant luxury fashion retailers and executive interviews

	Country of origin	Format	Ownership	Interviewee position	Entry time & mode	Distribution strategies & multiple channel retailing
A	France	Design house	Subsidiary	Vice President Retail Director	1992 & Organic growth	Exclusive & Omni-channel
B	France	Design house	Private	Managing Director Retail Director	1996 & Organic growth	Exclusive & Omni-channel
C	Germany	Design house	Private	Business Development Director Retail Director	1994 & Franchising	Selective & Cross-channel
D	Germany	Accessories specialist	Subsidiary	Managing Director Wholesale Manager	1996 & Organic growth	Selective & Multi-channel
E	Italy	Design house	Private to Subsidiary	Retail Manager Managing Director Brand Manager	1993 & Franchising	Selective & Multi-channel
F	Italy	Design house	Private	Managing Director Wholesale Manager	1995 & Franchising	Selective & Cross-channel
G	Italy	Design house	Subsidiary	Vice President Brand Manager	2007 & Organic growth	Exclusive & Omni-channel
H	Japan	Design house	Private	Retail Director Brand Manager	2011 & Organic growth	Exclusive & Multi-channel
I	Spain	Design house	Subsidiary	Vice President	2001 & Organic growth	Exclusive & Omni-channel

				Managing Director		
J	Switzerland	Accessories specialist	Private to Subsidiary	Vice President Digital Marketing Director Retail Director	1991 & Organic growth	Selective & Multi-channel
K	UK	Design house	Private	Retail Manager Strategy Director	1993 & Franchising	Exclusive & Cross-channel
L	UK	Design house	Private to Subsidiary	Managing Director Retail Director E-Commerce Manager	1997 & Licensing	Selective & Multi-channel
M	UK	Design house	Private	Digital Marketing Director Managing Director	2011 & Franchising	Exclusive & Multi-channel
N	US	Design house	Private	Digital Market Manager Retail Director	1997 & Franchising	Selective & Multi-channel
O	US	Design house	Subsidiary	Vice President Retail Director	1996 & Joint venture	Selective & Multi-channel

Thirty-three semi-structured executive interviews in total (Table 2), as primary data, were carried out in English between November 2018 and November 2022. These lasted between 65 and 90 minutes each, to allow a detailed insight into the strategic decision making and operations across the different functions within the organisations. The collection of data continued until saturation point when the researchers identified that no additional information was being revealed (King and Brooks, 2017). To allow the interviewees to prepare, they were sent the interview questions in advance (Table 3). The participant retailers and associated interviewees were coded and described via distinguishing factors during data analysis and reporting fulfilled confidentiality agreements. There were seven participating retailers who offered internal documents as secondary data, including staff training manuals, process and project documentation, and internal reports.

Table 3: Semi-structured executive interview questions

Research questions	Interview questions	Literature
RQ1	- Could you please explain what the major reasons behind your company's multiple channel distribution strategy in China were?	Beck and Rygl, 2015; Vyt *et al*., 2022
RQ2	- How has your company developed multiple channel retailing in China? - In terms of your company's multiple channel retailing, what channels made up the channel mix within the multiple channel distribution?	Ye *et al*., 2018; Karim and Qi, 2021 Bai and McColl, 2023
RQ3	- Could you please explain what your company's distribution strategy in China is? Has the strategy been adapted to the local conditions? - In terms of channel length, could you please explain your company's channel length in China? Is the channel length the same in other markets, and why? - As we discussed, could you please explain which multiple channel retailing strategy your company has adopted (multi-, cross-, or omni-channel retailing), and could you please explain why did you choose it? - In your opinion, what are the influences of your company's distribution strategy and channel length on your company's (localized) multiple channel distribution strategy?	Van Baal, 2014; Beck and Rygl, 2015; Verhoef *et al*.,2015; Galipoglu *et al*., 2018; Verhoef, 2021; Thaichon *et al*., 2022

Thematic analysis was used to analyse the qualitative data as it enables the interpretation of complex data. Utilising Braun and Clark's (2013) six step approach to qualitative analysis, emergent themes were identified. These were coded and analysed utilising the interview data, the internal documentation, the market research reports, and the annual reports. NVivo 10 was used to analyse the data, as it facilitated for the organisation of the data. The Table 4 below shows the codes and themes of qualitative data analysis. Techniques including multiple researchers, multiple interviewees within one participating retailer, and internal documents as secondary data, help to minimise the researchers' and interviewees' subjective bias and to strengthen the validity of the data as well as the findings of the study (O'Kane *et al*., 2021).

Table 4: Thematic analysis of research data

Themes	Codes
1.1 Proactive	Increase sales, Reach as many consumers, Various channels, Innovative channel, Seamless brand experience, In-house CRM
1.2 Reactive	Local partner, New owner, Follow others
2.1 Offline to online	Online infrastructure, e-tailers, Chinese e-commercial platforms, official website, online store, Chinese social media
3.1 Multi-channel	Local partner, Increase sales, Extend business, Reach consumers, Various channels, Selective distribution, Brand dilution
3.2 Omni-channel	Wholly-owned operation, Exclusive distribution, Direct marketing, In-house CRM, Integration, Seamless brand experience, Convergence, Regional difference, Local knowledge
3.3 Cross-channel	Strategic shifting, Transitional, Short-term, Local partnership to direct control

4. Results

4.1 Motives behind luxury fashion retailers' multiple channel retailing

It is identified that both proactive and reactive factors have motivated luxury fashion retailers' multiple channel distribution strategies in China (Table 5). It is also revealed that the motives and the chosen types of multiple channel distribution strategies are strongly interrelated.

Table 5: Motives behind luxury fashion retailers' multiple channel retailing

Proactive	Reactive
- Increasing sales - Channel innovation - Consistent brand experience	- Local partners' and new owners' ambitions - *Me too* - React to market needs

In terms of proactive factors, thirteen of the participating retailers (except retailers A and B) indicated that the most important motive behind their multiple channel retailing strategies was the desire to increase sales through a wider range of channels. They are seeking to reach as many consumers as possible. This was especially important for design houses which offer a wide range of product lines. By the internal report, retailer M explained that they needed to adopt various channels to reach their target consumers for different products. For example, they distribute lifestyle homeware via concessions in department stores. Meanwhile, retailer G stressed the importance of e- and m-commerce to increase sales, and explained that:

"*We have not reached saturation point yet, and there is still room to grow via more (physical) stores as well as through other different types of channels, especially e- and m-commerce*".

As the e-commerce pioneers in China, six participating retailers (A, B, D, G, I, K) highlighted that their multiple channel distribution strategies were driven by the ambitions to innovate in their distribution channels. This desire allowed them to strengthen their consumers' brand experiences via creative shopping environment and channels. Retailer D confirmed that:

"*We are creative and innovative not only in aesthetic aspects such as product design, but also in distribution channels, shopping atmosphere and experience*".

Four participating retailers stressed that their omni-channel retailing was motived by the aspiration to offer their consumers a seamless brand experience. In their staff training manual, retailer B targeted the development of their in-house CRM systems through omni-channel retailing, which can be globally accessed and shared between their stores and digital channels. Therefore, they are more likely to obtain a deep understanding of their consumers, and to be able to offer them consistent services across channels. Retailer B further explained that:

"The omni-channel retailing enables us to develop globally accessed CRM (internally) and to offer a consistent (brand) experience for Chinese consumers across channels, even abroad. This is vital because of Chinese consumers' considerable cross-border shopping".

On the other hand, the retailers' multiple channel distribution strategies were passively led by their local partners. This was particularly important for eight of the participating retailers, who had entered China and further developed their businesses through local partnerships. Meanwhile, shifting ownership structure and a new parent company (an EMNC originates from China) may have been another trigger for three of the participating retailers' multi-channel retailing (E, J and L). The similarity shared between the eight participating retailers is that their local partners sought to extend their distribution networks and increase sales using their local knowledge and business networks. For example, retailer L stressed that:

"Our multi-channel retailing was developed by our parent company, who possesses solid local knowledge and collaboration between Chinese e-commercial platforms".

'*Me too*' was identified as another reactive motive. Four participating retailers (F, H, M, O) explained that their multiple channel retailing was led by their counterparts' multiple channel distribution strategies. In other words, they followed their competitors' distribution strategies. Eleven participating retailers confirmed that Chinese consumers' willingness to shop across various channels had prompted them to develop e- and m-commerce, and to adopt multiple channel distribution strategies. Therefore, their multiple channel retailing can be considered to have been set up in reaction to emerging market needs. Retailer F explained that:

"Consumers today shop anywhere, anytime… We should react to it via various kinds of channels, as it is impossible to run brick-and-mortar stores in every city (in China)".

4.2 Development patterns of localised multiple channel retailing

It is identified that all the participating retailers have developed their multiple channel distribution strategies from offline to online, specifically from brick-and-mortar stores to e- and m-commerce and social media. Four channels are recognised as forming the online channel mix: e-tailers, Chinese e-commercial platforms, official websites, and Chinese social media. Additionally, official websites and Chinese social media are widely regarded as integrations

between online and offline channels.

Because of online expertise and infrastructure, especially online payment and logistics, e-tailers and Chinese e-commercial platforms (Tmall.com and JD.com) were regarded as important distribution channels by eleven and thirteen participating retailers respectively. Chinese e-commercial platforms are more popular, because of the very limited number of reputable and well-established luxury fashion e-tailers in China. Nevertheless, the internal reports and process documents of retailers E, J and L confirmed that these two online channels are especially important for firms adopting multi-channel and cross-channel retailing in order to increase sales via additional channels. These two channels are widely regarded by participating retailers as efficient and effective online channels to reach wider ranges of consumers in non-capital cities. Moreover, the radical difference between these two channels is channel length. The channel length of e-tailers is longer than that of e-commercial platforms because luxury fashion retailers can offer relatively direct marketing through e-commercial platforms. Retailer N operates online flagship stores on both Tmall and JD.com, and confirmed that:

> "*Both Tmall and JD.com offer solid online infrastructure such as payment and logistics, which are vital for our e-commerce (in China)… Our online flagship stores (on both platforms) have opportunities to offer a full range of products for consumers around China*".

Official e- and m-commerce embedded within official websites have been widely adopted by fourteen participating retailers, who are running three kinds of multiple channel retailing. According to the project document of retailer A, they regard this channel as an online store, because of its capacity to add tangible and intangible value directly, such as live consultation on product enquiries and order issues, and after-sales services. An official online store was especially important for the three participating retailers running cross-channel retailing. In their internal report, retailer K highlighted the advantages of increasing brand awareness and sales, which created opportunities to enhance their control over their brands and business. Meanwhile, four participating retailers who had adopted omni-channel retailing regarded online stores as integration across channels, particularly in national and regional capitals cities where developed retail market infrastructure are available. This strategy drives online

consumers to brick-and-mortar stores via *click-and-collect* and after-sales services, helping retailers to strengthen the tangible and intangible values of their branded products and services. Since it is difficult to distribute a full range of products in physical stores, offline consumers are also encouraged to go online to purchase the products which are not available in store. For example, retailer I highlighted the importance of their online store:

> "*We regard our website (official online store) as a virtual (physical) store. Our official online store (website) not only raises sales, but also tells the story behind the brand. More importantly, it creates integration between channels, such as click-and-collect service*".

Engagement on Chinese social media platforms (WeChat, Weibo and Little Redbook) has become necessary for most participating retailers because of the platforms' capacities to help them communicate with consumers, strengthen their brand identity, and understand up-to-date e-WOM (word of mouth) regarding to their products and services. This channel is especially important for omni-channel retailers to integrate and even optimise channels from a country-level perspective. For instance, retailer C reported that they established more brick-and-mortar stores after they identified opportunities through the feedback gained from Chinese social media. Three participating retailers saw Chinese social media as an important tool for their *globalised* marketing strategy because of the large numbers of overseas Chinese and Chinese tourists' frequent cross-border shopping. Moreover, retailers B and G believed that the boundary between distribution and communication has been blurred in China because of the multiple functions of social media. Indeed, retailer B claimed:

> "*We have started to use (Chinese) social media to distribute, especially (Chinese) limited editions. Meanwhile, we also harmonised our brand stories into our products and services through social media.*".

Therefore, it is recognised that most retailers have adapted their online channels to the Chinese market condition. Some retailers even have localised further via differentiated capital and non-capitals cities. They are more likely to offer direct marketing and integrate online and offline channels in capital cities.

4.3 Feasibility and suitability of three types of multiple channel distribution strategies

4.3.1 Popular multi-channel retailing

As shown in Table 2, multi-channel retailing is the most popular in China. It is particularly important for private fashion houses which have entered China and further extended their businesses through local partnerships. In terms of retailing format, six design houses (E, H, L, M, N and O) and two accessories specialists (D and J) had adopted it. In relation to ownership structures, three were private brands (H, M and N) and two were subsidiaries owned by luxury conglomerates (D and O). It is necessary to mention that retailers E, J and L had changed from private brands to subsidiaries after their initial Chinese market entry. Moreover, in terms of market entry modes, participating retailers who adopted local partnerships to enter China were more likely to adopt multi-channel retailing. This can be evidenced by five retailers (E, M and N via franchising, L via licensing and O via joint venture) which had done so, compared to three which entered via organic growth (D, H and J).

It is recognised that multi-channel retailing is more appropriate for luxury fashion retailers adopting selective distribution strategies in host markets. Indeed, seven out of eight participating retailers developed multi-channel retailing within selective distribution strategies. As was discussed earlier, multi-channel retailing is suitable for firms who adopted local partnerships to enter China and/or extend their business and operations after initial entry into China. Although retailers D and J entered China through organic growth, their post-entry expansion and operations were accelerated by their local partners and new owner respectively. This reflects the motive for multiple channel retailing in China that it is driven by local partners' ambitions to develop business further. Therefore, their channel length could vary and lengthen to include direct marketing and their partners' networks (although this is only applicable to those who developed their business further in China through local partnerships). For example, retailer N confirmed the importance of their local partners in their multi-channel retailing:

> "*Our online flagship stores were proposed and developed by them thanks to their collaborations with e-commercial giants in China*".

Meanwhile, increasing sales, as the most important motive behind multiple channel distribution strategies, was a strong trigger for luxury fashion retailers' multi-channel retailing. As a sales-focused strategy, the participating retailers agreed that multi-channel retailing helped

them to access as many consumers as possible via a maximum number of channels – this was especially useful for lifestyle design houses offering a wide range of products and services. More specifically, through multi-channel retailing, luxury fashion retailers can distribute core and non-core products via differentiating and prioritising channels and even geographical markets without worrying about diluting their brand image. This was confirmed by six of the participating retailers. For example, retailer M said:

> "*Multi-channel retailing is important for our (post-entry) business development in tier-2 and tier-3 cities (in China), as we can distribute core products and non-core products by different channels*".

The challenges associated with multi-channel retailing have also been identified. There is a risk that the consistency of brand identity may potentially be diluted because the same brand is being operated by multiple partners in a host market. These partners may sell products via different promotions to maximise profits. For instance, from their internal report, retailer J is working with two partners in Xi'An (a regional capital city in northwest China), and the stock cannot be exchanged between them. Meanwhile, three of the participating retailers highlighted that an internally shared and accessible CRM is absent in this strategy due to internal competition amongst multiple stakeholders. Therefore, it is rationale that consumers' experiences with the same brand could vary due to different partners' operations. For example, retailer E explained that:

> "*The challenge of multi-channel is potential brand dilution and consumers' confusion. This could be caused by different marketing campaigns and promotions of various local partners*".

4.3.2 Potential omni-channel retailing

The findings revealed that omni-channel retailing is only feasible for those firms which entered China via organic growth and further developed their business through a wholly-owned exclusive distribution strategy, especially group-owned subsidiaries benefitting from parenting advantages. The four participating retailers who developed omni-channel retailing in China are all design houses. In terms of ownership structures, three are subsidiaries owned by luxury

fashion conglomerates (A, G and I) and one is a private brand (B). All four initially entered China via organic growth. Subsequently, they all adopted exclusive distribution strategies for their post-entry business development.

Due to their wholly-owned business operations and expansion, these companies are able to distribute their products through relatively shorter channels, especially via direct marketing. Indeed, luxury fashion retailers not only sell tangible consumer goods; they also offer intangible services. The importance of a short channel length was highlighted by retailer G:

"One of the most important motives behind our expansion into China was offering authentic services along with products, because we not only sell our branded products but also provide our branded services. This is the key difference between luxury brands and counterfeits".

Through direct marketing, luxury fashion retailers can collect consumer information directly in their distribution mix, and then develop an in-house CRM system. The CRM system is made accessible across all channels in order to offer target consumers a seamless brand experience across channels. The importance of an in-house CRM was confirmed by all four participating retailers. For instance, retailer A highlighted:

"To develop in-house CRM has become necessary, because it is the precondition to offer a consistent brand experience across channels… Nowadays, retaining existing consumers has become increasingly difficult because of key-opinion-leaders' (KOL) influence".

As discussed, omni-channel retailing requires full integration of, and interaction between channels. Retailer B indicated in their staff training manual that their integration of offline and online channels had been facilitated by (scannable) QR Codes in stores, a click-and-collect service, public relations events in stores, as well as sales floor staffs social media (as a part of CRM). It was also revealed that the boundary between distribution and communication has been blurred by integrated channels and the multiple functions of channels. Indeed, distribution and communication strategies are highly relevant and can create an eco-system for channels within omni-channel retailing, as confirmed by the four retailers. For instance, retailer I argued that social media and brick-and-mortar stores, especially flagship stores, can be used both as

distribution channels and communication tools. Furthermore, Chinese social media was adopted from a global perspective rather than China-only, because of the high value of Chinese consumers' cross-border shopping, and overseas Chinese residents (both consumers and floor sales staff). For instance, retailer G said:

> "*We are planning to adopt WeChat into our global communication mix, as it helps our sales staff to better communicate with Chinese consumers around the world*".

Nevertheless, retailers face some challenges in developing omni-channel retailing. Firstly, e-fulfillment in a continent-sized emerging market is not as straightforward as in smaller developed markets. Regional differences in China are also considerable in terms of economy, culture, climate, and market infrastructure. For instance, retailer B highlighted the difficulties of cross-regional customer services and after-sales care, because they tailored their product mix to local conditions in different regions. Secondly, to integrate channels is not straightforward, as it requires strong local knowledge, financial investment, solid expertise, and a developed logistics network, as well as vision on the part of the senior management. This also explains why omni-channel retailing is feasible under tightly controlled exclusive distribution strategies. Retailer I confirmed:

> "*Omni-channel is difficult to be developed and is not suitable for all brands due to many conditions, especially the capability to offer direct marketing, depth understanding of consumers (through in-house CRM), vision to integration channels and much more*".

Thirdly, because of the high level of intangible value created by interpersonal services in store, online service quality was highlighted by the project document of retailer A, as they have developed live chat for product inquiries, order tracking, after-sales care, and brand experience feedback. Finally, channel loyalty is another considerable challenge. This explains why pure e-commerce is the complementary to stores in luxury fashion retailing. Retailer G explained:

> "*It is difficult to change consumers' shopping pattern especially their trust channels. Luxury fashion consumers still prefer the shopping experience in physical stores due to strong intangible value such as interpersonal communication*".

4.3.3 Dynamic cross-channel retailing

The present research recognises cross-channel as the least popular multiple channel distribution strategy adopted by luxury fashion retailers in China, because only three participating retailers adopted this partly integrated strategy. All three are private design houses and entered China through franchising. Participating retailers C and F employ selective distribution strategies, and only participating retailer K adopts an exclusive strategy.

Two important aspects of cross-channel retailing have been revealed. The first is that cross-channel retailing is only suitable for those companies who are changing their post-entry business development strategies from their initial market entry modes. Indeed, all three participating retailers are withdrawing from local partnerships and shifting to wholly-owned expansion. Their channel length will possibly be reduced. Meanwhile, direct marketing through partly integrated channels within an exclusive distribution strategy is more likely to be developed. For example, retailer F highlighted that:

"*Our partners have helped us to gain some valuable experiences in China, but we are ready for the next chapter by ourselves ... we have started to optimise our (wholly-owned) stores and e-commerce (distribution channels) and to create more consistent brand experiences via (partly) integrated channels*".

The second important aspect is that cross-channel retailing is regarded as a transitional strategy rather than a long-term distribution strategy, because the ultimate goal for participating retailers is to develop fully integrated omni-channel retailing. During the transition, the retailers may develop their own CRM system and thereafter integrate channels to achieve sustainable growth via wholly-owned expansion and operation strategies. This was confirmed by all three participating retailers. For example, retailer K argued that:

"*Consistent service across channels and seamless brand experience is the key for success… It is difficult for us to directly develop omni-channel retailing, but we are on the way there*".

Therefore, the present research finds that all the luxury fashion retailers in the sample developed their multiple channel distribution in China from offline to online. However, the

motives and suitability of different types of multiple channel retailing are strongly interrelated.

5. Discussion and conclusion

This empirical research examines the motives, development patterns, and feasibilities of the three different kinds of multiple channel retailing strategies (Table 6).

Table 6: Motives, distribution strategy and channel length of multiple channel retailing

	Multi-channel	Cross-channel	Omni-channel
Motives	- Increasing sales - Ambitions of local partner or new owners to extend distribution - React to market needs	- Ambitions of local partner or new owners to extend distribution - React to market needs	- Channel innovation - Consistent brand experience
Online channels	- E-tailers - Chinese e-commercial platforms - Chinese official website - Chinese social media	- Chinese e-commercial platforms - Chinese official website - Chinese social media	- Chinese e-commercial platforms - Chinese official website - Chinese social media
Expansion strategy	- Local partnership or direct control	- Shifting from local partnership to direct control	- Direct control
Distribution strategy	- Selective	- Shifting from selective to exclusive	- Exclusive
Channel length	- Mixed, long (as manufacturer brands) and short (as retailer brand)	- Mixed, moving from long to short	- Short, direct marketing

The present study identified proactive and reactive motives behind luxury fashion retailers' choice of localised multiple channel distribution strategies in China. This extends the work of Beck and Rygl (2015) who argue that retailers' multiple channel distribution strategies are triggered by target consumers' willingness to purchase from multiple channels. Additionally, this study has found strong connections between the motives and types of multiple channel retailing. For example, the main reasons for multi-channel retailing are to increase sales, and local partners' and new owners' ambitions to extend distribution.

It is revealed that luxury fashion retailers have developed their multiple channel retailing from offline channels to e-commerce in China. This confirms the findings of prior studies (Galipoglu *et al.*, 2018). Further, the present study has newly identified four vital channels for luxury fashion retailers' online channel mixes in China, including Chinese e-tailers, Chinese e-commercial platforms (JD.com, Tmall.com), online stores embedded in official websites, and Chinese social media (WeChat, Sino Weibo, and Little Redbook).

The strong impacts of foreign market entry modes, distribution strategies, and channel lengths towards choices of multiple channel retailing have been traced. Private design houses that entered China through local partnerships are found to be more likely to adopt multi-channel retailing, which is appropriate for companies employing selective distribution with relatively longer channels. As discussed, local partners and new owners can be major facilitators of luxury fashion retailers' multi-channel retailing in China. However, due to potential conflict between the priorities of brand owners (maintaining brand image) and local partners (increasing profits), different experiences may arise for the same retailer because of potential internal competition (Hübner *et al.*, 2015). Moreover, in contrast to Verhoef *et al*. (2015) who find that retailers are keen to adopt cross-channel for multiple channel distribution strategy, this study found that multi-channel retailing is most popular amongst luxury fashion retailers who developed multiple channel retailing from offline stores to e-commerce.

Group-owned subsidiary design houses that entered China through wholly-owned organic growth are more likely to adopt omni-channel retailing, as this is suitable for companies employing an exclusive distribution strategy via a shorter channel. Due to the benefits of direct marketing, a self-owned CRM system may be developed. All the channels in this strategy can access customer information, enabling the delivery of a seamless and consistent brand

experience. Moreover, various functions of the chosen channels have blurred the boundaries between distribution and communication strategies. For instance, flagship stores are not only useful for distribution and profits-generation, but also for developing brand awareness and enhancing brand image (Moore *et al*., 2010). A Chinese social media channel is not only for communication with target consumers, but is also for distributing products, especially highly-profitable limited editions, to enhance intangible consumer value (Bai and McColl, 2023). Although this study has identified some methods used to integrate channels, it is difficult to change Chinese consumers' established purchase behavior in relation to luxury fashion products due to the high (intangible) value added via interpersonal services in stores (Rodriguez-Torrico *et al*., 2020).

Finally, cross-channel retailing is found to be more suitable as a transitional strategy from multi- to omni-channel retailing rather than a long-term strategy, which confirms Frasquet *et al*. (2019). The present study reveals that cross-channel retailing is likely to be adopted by those companies which are shifting their post-entry business development and expansion from local partnerships to wholly-owned organic growth. They may change their distribution strategies from selective to exclusive and shorten their channel length.

5.1 Theoretical and managerial implications

The theoretical implications of this paper pertain to both retailer internationalisation and multiple channel retailing from the following four aspects. Firstly, the present study examines multiple channel retailing from the perspective of retailer internationalisation. This is radically different from prior literature which focus on retailers' intrinsic characteristics (Ye *et al*., 2018). It therefore offers in-depth insights into the multiple channel distribution strategies adopted by luxury fashion retailers for their business development after initial entry into China. Different from Liu *et al*. (2016) and Bai *et al*. (2021, 2022) which examine localised communication, motives and localised marketing and product strategies, the present study further enriches the understanding of luxury fashion retailers' localised distribution through multiple channel retailing after their initial market entry.

Secondly, the study extends the understanding of the motives behind luxury fashion retailers' multiple channel distribution strategies. Different from prior studies (Beck and Rygl,

2015; Verhoef, 2021) which focus on consumers, this paper contributes both proactive and reactive factors that trigger luxury fashion retailers' multiple channel retailing. More importantly, the interrelations between motives and the choice of multiple channel distribution strategy are recognised. Thirdly, this paper confirms that luxury fashion retailers have developed their multiple channel retailing in China from offline to online (Karim and Qi, 2021). The online distribution channel mix in the context of the Chinese luxury fashion market is newly identified, and it is different from developed markets (Moore et al., 2010) and generic retailers (Yrjölä *et al*., 2018), because of popular direct marketing with short channel length and importance of e-commercial platform and social media in China. Fourthly, this paper contributes empirical evidence of feasibility and suitability of three kinds of multiple channel distribution strategies for luxury fashion retailers. It particularly contributes to the current literature on multiple channel retailing through identifying the impacts of distribution strategies and channel length towards appropriate multiple channel distribution strategy in a host market.

The managerial implications are twofold. Firstly, practitioners are suggested to adapt multiple channel retailing based upon their international expansion strategies, distribution strategies, and channel length in the host markets. Further suggestions include: multi-channel retailing is suitable for firms who have entered China and further developed their businesses through local partnerships and adopted a selective distribution strategy via relatively longer channels; omni-channel retailing is only feasible for retailers who adopt an exclusive distribution strategy through direct marketing and wholly-owned CRM; and that cross-channel retailing can be employed by companies who withdrawing from local partnerships and shifting to wholly-owned expansions and operations in host markets. Secondly, Chinese social media platforms are suggested to be employed in a global way due to Chinese tourists' considerable cross-border shopping around the world. This study is particularly important in offering opportunities to retailers whose e-commerce has been less of a focus in terms of expansion and where there is ambition for operations to expand across the whole country.

5.2 Research limitations and future research direction

The limitations of this research can be identified by the two aspects. The purposive sampling and the relatively small sample size might potentially be challenged. However, the thirty-three

executive interviews obtained from the fifteen participating luxury fashion retailers, across a wide range of countries-of-origin, retailing formats, ownership structures, and internationalisation strategies, are perceived to be diversified enough to represent the market. Moreover, the findings were generated from China, the world's second largest luxury fashion retail market. These can be generalised into other emerging markets and/or geographically large markets, especially where considerable regional differences exist, such as Brazil and India.

Future studies are suggested to extend the findings of this study by examining the multiple channel retailing of luxury fashion retailers and even large-scale supermarket chains in other markets and in China, especially those which have developed their multiple channel retailing from online to offline, such as Strathberry of Edinburgh (Bai and McColl, 2023). Future research may test and extend the findings in relation to the motives, development patterns, and feasibilities of the three identified kinds of multiple channel retailing through quantitative research and larger samples. Furthermore, future studies are also suggested to investigate and compare consumers' brand experiences and consumption behavior between three kinds of multiple channel retailing.

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