Analyzing Omni-Channel Strategies of the Turkish Clothing Sector

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Introduction

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

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

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

Omni-channel strategy and its features

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

Here, channel management refers to the process by which a company analyses, organises and controls its channels. This can range from the complete separation of channels to total integration with full coordination, with a wide range of gradations and strategies between the two extremes. The main differences between these concepts are the different degrees to which the customer can trigger channel interaction and to which the retailer can control channel integration [1].

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

In a single-channel approach, retailers only operate one sales channel and a logistic system is dedicated for this individual channel. However, in a multi-channel approach, retailers operate multiple channels, but with segregated units, creating stand-alone systems for operations and logistics. Customers obtain products either in store or via direct customer deliveries. Processes are not integrated from a customer perspective and there is no operational or logistics interface between the two channels [6]. In other words, multichannel refers to the design,
deployment, coordination and evaluation of the different channels through which the marketer acquires, retains and develops customers. Its focus is on managing and optimising the performance of each channel [3].

Cross-channel retailing is the set of activities involved in selling merchandise or services through more than one channel or all widespread channels, whereby the customer can trigger partial channel interaction and/or the retailer controls partial channel integration [2]. When channels work independently of each other, they create fragmented supply chains and struggle to deliver a consistent and reliable consumer experience. Therefore, omni-channel retailing aims to address this issue by coordinating the process and technologies across all channels to provide seamless, consistent and more reliable services for consumers [7].

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

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

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

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

Omni-channel retailing is an integrated sales experience that melds the advantages of physical stores with the information-rich experience of online shopping. As the retail industry evolves towards a seamless omni-channel retailing experience, the distinctions between physical and online will vanish, turning the world into a showroom without walls [13]. In other words, omni-channel retailing is the synergetic management of numerous available channels and customer touch points in such a way that the customer experience and the performance over all channels are optimised. Omni-channel retailing evaluates every touch point and channel alternative to enrich the customer experience and provides an integrat-
ed sales experience that combines the advantages of physical stores with the enhanced information level provided by online shopping [14]. With an advanced omni-channel logistics approach, neither the customer nor the retailer distinguish between channels anymore [6].

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

### Purpose and method of the research

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

Within the scope of the research, interviews were conducted with the marketing managers of Turkish clothing enterprises and a questionnaire form consisting of 8 main questions was sent to them. During the limited period of time assigned for this research, which was May of 2018, the enterprises which had not returned or had not been able to return the form were removed from the research. Besides this, in parallel with the survey, some data were collected from secondary data resources. Finally, the data collected, been obtained from primary (survey) and secondary data resources, were evaluated and analysed.

### Findings of the research and their analysis

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

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

| Enterprise name | Physical store | Online store | Mobile application | Social media | Opening dates of channels |
|-----------------|----------------|--------------|--------------------|--------------|--------------------------|
| Adil İşık       | ✔              | ✔            | ✔                  | ✔            | 1992, 2012, 2016, 2010  |
| Beymen         | ✔              | ✔            | ✔                  | ✔            | 1971, 2010, 2014, 2010  |
| DeFacto        | ✔              | ✔            | ✔                  | ✔            | 2005, 2014, 2015, 2011  |
| İpeköl         | ✔              | ✔            | ✔                  | ✔            | 1989, 2012, 2017, 2010  |
| Kiğılı          | ✔              | ✔            | ✔                  | ✔            | 1969, 2009, –, 2010     |
| Koton          | ✔              | ✔            | ✔                  | ✔            | 1988, 2015, –, 2009     |
| LC Waikiki     | ✔              | ✔            | ✔                  | ✔            | 1997, 2011, 2014, 2011  |
| Mavi Giyim     | ✔              | ✔            | ✔                  | ✔            | 1991, 2013, –, 2009     |
| Pinqo Giyim    | ✔              | ✔            | ✔                  | ✔            | 1984, 2009, –, 2011     |
| Sarar Giyim    | ✔              | ✔            | ✔                  | ✔            | 1944, 2011, –, 2012     |

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

| Enterprise name | Current social media channels |
|-----------------|------------------------------|
| Adil İşık       | Twitter, Facebook, Instagram, YouTube |
| Beymen         | Twitter, Facebook, Instagram, Google+ |
| DeFacto        | Facebook, Instagram, Twitter, YouTube, Google+, LinkedIn, Pinterest |
| İpeköl         | Twitter, Facebook, Instagram, Pinterest, YouTube |
| Kiğılı          | Twitter, Facebook, Pinterest, Instagram, Google+, YouTube |
| Koton          | Instagram, Facebook, Twitter, YouTube, Google+ |
| LC Waikiki     | Twitter, Facebook, Pinterest, Instagram, Google+, YouTube, Linkedin |
| Mavi Giyim     | Facebook, Twitter, Instagram, Google+, Tumblr, YouTube |
| Pinqo Giyim    | Twitter, Facebook, Instagram, Google+ |
| Sarar Giyim    | Instagram, Facebook, Twitter, YouTube |

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

| Enterprise name | Shares of channels within total turnovers |
|-----------------|------------------------------------------|
| Physical store  | Shares of channels within total turnovers |
| Adil İşık       | 95% | 6.2% | 2.8% | No sales |
| Beymen         | 97% | 6.2% | 2.8% | No sales |
| DeFacto        | 97% | 6.2% | 2.8% | Included in 3% |
| İpeköl         | 98% | 4%   | Non-existent | Included in 4% |
| Kiğılı          | 94% | 6%   | Non-existent | %1 |
| Koton          | 96% | 4%   | Non-existent | Included in 4% |
| LC Waikiki     | 95% | 5%   | Non-existent | No sales |
| Mavi Giyim     | 97.5 | 2%  | Non-existent | Included in 2% |
| Pinqo Giyim    | 95% | 5%   | Non-existent | No sales |
| Sarar Giyim    | 55% | 1%   | Non-existent | No sales |
table, six out of the ten enterprises were established after 1980. Although the history of the Turkish textile and clothing sector dates back to the first years of the Turkish Republic, the clothing sector was essentially improved in the 1980s, in which open economy policies were preferred. In this context, the number of operating enterprises within the sector rapidly increased after the 1980s. On the other hand, when the business segments of participating enterprises are analysed, it can be seen that only three enterprises focus on one segment, whereas other enterprises operate in 2-4 segments. In other words, three enterprises implement a brand strengthening strategy by focusing on the segment in which they are best. As another option, most of the enterprises try to present products in all sub-segments of the clothing sector, because they want to attract more customers and capital by fulfilling the different needs of individuals and their loved ones. Moreover, half of the participating enterprises possess one brand, whereas the others own more than one.

According to the research results obtained, the participating Turkish clothing enterprises use more than one channel in order to reach customers (Table 3). Therefore, all participating enterprises have successfully implemented a multi-channel strategy. All of them primarily reach their customers via physical stores. They have preferred social media and/or online stores as a second channel. Enterprises have both joined social media and opened their own online stores in order to increase communication between their brands and customers, and consequently their sales. Finally, enterprises have started to use the mobile application channel. All of the participating enterprises possess online store and social media accounts, whereas only half of them own a mobile application, because despite e-commerce having been improved and become widespread in Turkey since the 2000s, mobile trade history only dates back to 3-5 years ago. Current social media channels of participating enterprises are summarised in Table 4.

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

| Enterprise name | Channels | Purchase | Product exchange | Product return | Product modification | Technical information | Comment on products | Read other comments |
|----------------|----------|----------|------------------|----------------|----------------------|----------------------|--------------------|--------------------|
| Adil İşık      | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | ✓ | ✓ | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | ✓ | ✓ | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Beymen         | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| DeFacto        | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| İpekyol        | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Küşüklü        | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Koton          | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| LC Waikiki     | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Mavi Giyim     | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Panço Giyim    | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
| Sarar Giyim    | Physical store | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | – | – |
|                | Online store  | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Mobile application | ✓ | – | ✓ | – | ✓ | – | – | – | – |
|                | Social media   | – | – | – | – | – | ✓ | ✓ | – | – |
As can be seen, participating enterprises reach their customers via 4-7 social media channels, with Facebook, Twitter and Instagram being the most preferred. In other words, all participating enterprises use these three channels.

When the shares of channels within the enterprises’ total turnovers are analysed, it can be seen that online sales (online store, mobile application and social media sales) take shares of between 1% and 9% (Table 5). The average share of ten enterprises’ online sales within their total turnovers is approximately 4.5%. Participating enterprises take the lion’s share from their own online stores with regard to online sales. As can be seen from the results obtained, mobile application and social media sales are the newest sale channels for enterprises and nowadays they are putting these channels on their agenda. Only half of the participating enterprises make sales via a mobile application, whereas 40% of them sell through social media channels (Instagram and/or Facebook). In this context, it can be said that enterprises prefer to use social media for advertisements and communication with customers.

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

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

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

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

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

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

|                      | Adil Işık | Beymen | DeFacto | İpekylı | Kビジ | Koton | LC Waikiki | Mavi Giyim | Panço Giyim | Sarar Giyim |
|----------------------|-----------|--------|---------|---------|------|-------|------------|------------|-------------|-------------|
| Data of physical stores and online stores are | not shared with each other. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| partially shared with each other. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| completely shared with each other. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Our salesperson can use any channels. | cannot use any channels. | – | – | – | – | – | – | – | – | – |
| can use one channel. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| can use different channels. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Our channels are not integrated. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| partially integrated. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| completely integrated. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| The focal point of our enterprise is its customers and retail activities. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |

FIBRES & TEXTILES in Eastern Europe 2019, Vol. 27, 5(137)
online store and mobile application, the exchange, return and modification conditions are the same for both channels. When making sales through social media, conditions are similar to online store circumstances. In this area, two factors demand attention: Firstly, participating enterprises do not prefer to give their products’ technical information in their social media accounts. If an enterprise makes sales through a social media channel, it indicates products’ codes and gives a link to an online store. Secondly, customers cannot comment on products and read other statements in online stores and mobile applications. However, customers can comment, via enterprises’ social media accounts, as much as they want, and also they can see and read other customers’ statements. According to another result obtained, customers can return products to online stores; however, they cannot exchange them in online stores. Only three enterprises (Mavi, Kiğılı and Sarar) provide an exchange service in their online stores. In other words, they exchange online purchased products via their online store.

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

According to the other results obtained, 60% of the participating enterprises accept online purchased products’ returns in their physical stores. Besides this, all enterprises exchange online purchased products in their physical stores. Similarly, 80% of the enterprises modify online purchased products in their physical stores. On the other hand, home delivery service (delivery of physically purchased products to customers’ houses) is only possible in Beymen and Abdullah Kiğılı, which operate in the luxury brand sector. Similarly, these two luxury brands provide free access to their online store/mobile application in their physical stores. Similarly, Beymen and DeFacto provide free access right to their online stores in their physical stores via interior kiosks. On the other hand, half of the participating enterprises give tablets to their salesperson who serve in physical stores. Therefore, the salesperson can give instant information to the customers about products’ stock status and properties.

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

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

Results and general evaluation

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

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

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

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

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

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