

THE ROLE OF BRAND IMAGE IN BUILDING CUSTOMER LOYALTY IN THE FASHION E-RETAIL INDUSTRY OF SOUTH AFRICA

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DATE: 16 OCTOBER 2017

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*I hereby declare that the Research Report submitted for the **Honours in Bcom Strategic Brand Management** degree to The Independent Institute of Education is my own work and has not previously been submitted to another University or Higher Education Institution for degree purposes.*



ABSTRACT

The purpose of this study is to explore how fashion e-retailers create a loyal customer base through different attributes and brand image. The focus will be on how fashion e-retailers in South Africa (specifically Superbalist, RunwaySale, Spree and Zando) build brand image and how the brand would have to rely on brand image elements, with a strong focus on brand attributes - and how these e-retailers are overcoming the barriers of e-commerce to build and maintain a loyal customer base. This study follows a qualitative, phenomenologist approach to best understand the consumers' general perception and opinion of a brand's total attributes. A total of one hundred surveys, and four semi-structured, conversation-styled interviews with e-retailing users, delivered the findings.

The findings concluded that Superbalist has the most loyal customer base and best brand image. There is still an embedded mall culture in South Africa, as people want to touch, feel, and try on the clothes before they make the final purchase. The most important finding is that the relationship between brand image and customer loyalty is intertwined. Brand image influences customer loyalty, and customer loyalty influences how customers perceive the brand image.

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1. INTRODUCTION

The e-commerce industry of South Africa, with specific reference to the fashion e-commerce industry of South Africa, is a new concept. In an article with Bata's online e-commerce manager Darren Ravens, it states that the e-commerce sector in general has been growing gradually over the last few years in South Africa (Bata Market Trends, 2016). Ravens also said that the fashion e-commerce forms a key part of the 30 percent annual growth sustained over the last ten years.

The e-commerce industry in South Africa is largely being driven by two business models. One - purely online-based retailers, such as takealot.com, who are funded by hedge fund investors (such as Tiger Global) in pursuit of dominant market-share (Expresso Partners, 2012). Second - where traditional retailers are making the shift to online e-commerce, as an extension to their brand (Bata Market Trends, 2016). An example of the second business model, is Mr Price.

Even though e-commerce in South Africa is experiencing substantial growth, it is expected to grow even faster in the near future. In the years 2016 to 2020 online retail sales will almost double (World Wide Worx, 2017).

The majority of South Africans still prefer traditional shopping, such as shopping malls or physical space, compared to online shopping (Telkom Business blog, 2015). World Wide Worx (2017) substantiates the research by Telkom Business Blog (2015), as it states that online retail will only reach 1% of overall retail during 2016. The study argues that South African e-commerce industry is "underdeveloped."

The aim of this study is to explore the role brand image plays in creating a loyal customer base in the South African fashion e-commerce industry.

1.1 Concept Introduction

The role of brand image in building customer loyalty in the fashion e-retail industry of South Africa.

1.2 Problem Statement

How do South African fashion online retailers (specifically Superbalist, Zando, Spree, and RunwaySale) rely on brand image in order to build customer loyalty? Brand image can influence the general perception and opinion of a brand's total attributes in the minds of consumers. This study explores to what extent brand image attributes can influence customer loyalty for the brand.

1.3 Purpose Statement

The purpose of the proposed study is to explore how fashion e-retailers create a loyal customer base through different attributes and brand image. The focus will be on how fashion e-retailers in South Africa (specifically Superbalist, RunwaySale, Spree and Zando) build brand image and how the brand would have to rely on brand image elements, with a strong focus on brand attributes - and how these e-retailers are overcoming the barriers of e-commerce to build and maintain a loyal customer base.

1.4 Rationale and Relevance

“For the first time since the dawn of e-commerce in South Africa, online retail in this country will reach 1% of overall retail during 2016. Forecasts for the next five years, from 2016 to 2020, show online retail sales will almost exactly double over this period.” - Arthur Goldstuck, managing director of World Wide Worx.

This statement shows the promising growth of e-retailing in South Africa. This research study will be beneficial to online retailers, as online retailing in South Africa has quickly become a major industry. There has been an increase in fast-paced living, and people are not able to walk around in a mall at any given time. Subsequently; online shopping has become an undeniable player in the retail industry.

Satani (2014), states that people question the company if they have never heard of it - and they are unsure whether they deliver on their promise – thus, brand image and the public's general perception of the brand plays a role in how online retailers, who cannot rely on physical space, must rely on brand image to build a customer base.

The existing research on e-retailing do not specifically refer to fashion brands and how they build brand image. It includes all online shopping behaviour and brands, such as TakeAlot. Therefore, exploring how the different online fashion e-retailers in South Africa build brand image through attributes – whether it be product-related or non-product related, terms and conditions, and trustworthiness - can help other businesses gain insight into what works and do not work, when creating an online buying platform for their fashion brand. The research from this study can help businesses who have physical shopping space and are looking to expand to e-retailing.

This study will explore how e-retailing customers and non-users perceive the four e-retailing companies. It will include why there are still some barriers that South Africans are facing and it will be insightful for e-retailers - and possible emerging e-retailers - to make changes or adaptations in order to overcome these barriers and ultimately get more customers.

E-retailers can compare what the competitive advantages are of the four different e-retailers in the eyes of the consumers or general public – and whether or not it is in line with the image the company is trying to portray.

1.5 Research Questions

What role does brand image play in building a loyal customer base in the fashion e-retail industry of South Africa?

1.5.1 Sub-questions

These sub-questions are directly linked to the main research question. By answering the sub-questions, the main question's answer will have more depth and a fuller scope.

1.5.1.a) Attributes

What are the attributes (both product - and non-product related) that contribute to brand image and to ultimately building a loyal customer base?

1.5.1.b) Barrier to online shopping

How does brand image help customers overcome barriers to shopping online to ultimately build a loyal online customer base?

2. LITERATURE REVIEW

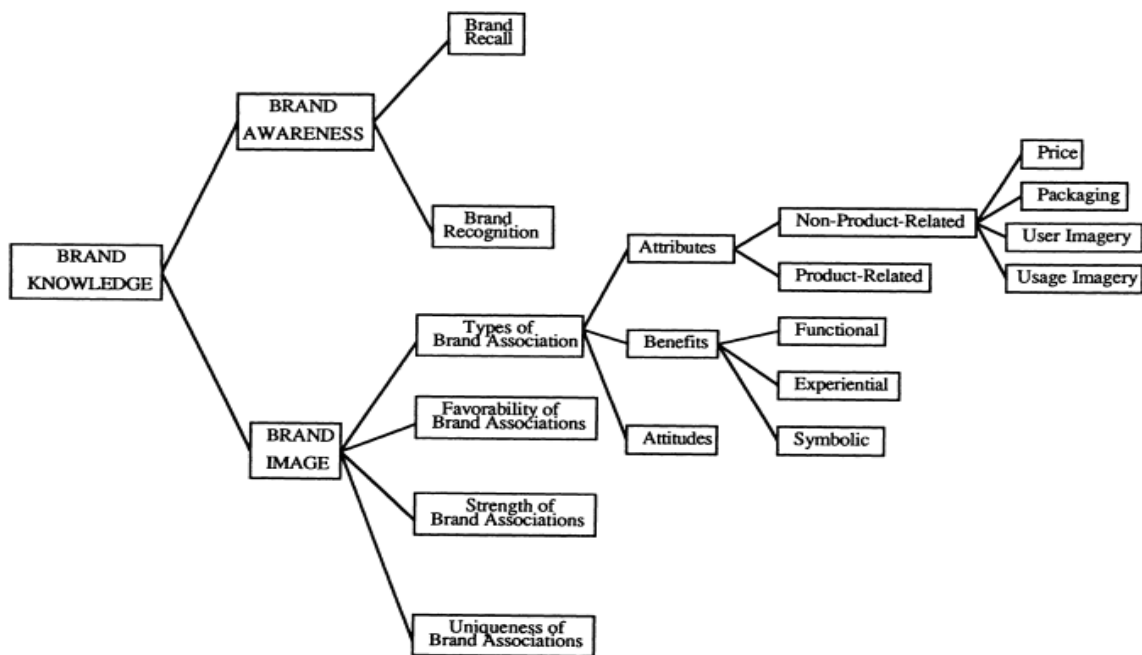
The aim of this review is to examine the prior research that has been conducted in this field. The theoretical foundation of previous studies will be discussed. This review will be divided into four major sections: brand image and brand associations, customer loyalty, the e-commerce industry of South Africa, and Roger's Innovation-Decision process.

2.1 Theoretical Foundation

The seminal work that this research study is based on, is Keller's (1993) diagram. One of the most important contrasts between the Brand Equity model of Aaker and the brand Equity model of Keller, is that Keller's model is from a customer-based perspective, whereas Aaker's model is from a company's perspective (Abratt, et.al., 2011; pp35-39) . As this study is concerned with what the customer's perceptions are, Keller's model is more apt.

This diagram indicates the different components that builds brand equity. One of the main components of brand knowledge is brand image, which then is also divided into various factors. This study focusses on the type of associations that make up brand image – more specifically attributes (product and non-product related) and the benefits. Keller proceeds to describe the attributes as features that characterise the product or service, whether it be product-related or non-product related. The benefits are described as the personal value the consumers attach to the service or product of a company.

Figure 1: Dimension of Brand Equity



Source: Keller, K. 1993. P7

This model relates to this study, as it outlines how attributes and benefits contributes to the larger idea of what makes up a brand and how it is perceived in terms of brand image. The adapted version of Keller's model of brand equity in Brand Management (Abratt, R., et al., 2011, pp. 39) also states that brand image forms part of brand equity.

It is especially relevant to this study, as brand attributes are of upmost importance for e-retailers. The company has to rely on attributes (whether it be product-related or non-product related) and benefits, in order to be successful and profitable, as e-commerce players cannot rely on the legitimacy of a physical store.

E-commerce fashion retailers, such as the four selected e-retailers in this study, cannot compete with the offline retailers in the sense that online stores cannot let the customer feel, touch or experience the product in-store; therefore it is important for online retailers to perfect their brand image to build loyal customers.

Non-product attributes, such as delivery costs, apps and the ease-of-use of apps and the website, and return policies, contribute to the satisfaction of customers. And then also the functional benefit of the convenience of online retailing is something that resonates with

customers. Motukuri, CEO of Spree, describes these non-product related attributes in an interview with Fin24 (2013) as convenience, affordable pricing, the ability to purchase a wider range of clothing which also is bought and worn by a fewer number of people.

2.2 Existing Literature on Research Topic

It is important to discuss and analyse what research has said about the topic at hand. Previous research give further insight into what other studies have found and whether it could be useful in this specific study. Existing literature also gives the researcher a broader idea of what has not been researched, or what is still a vague term in literature.

As mentioned above, little to no research has covered the exact topic of this study. Therefore it will be divided up into sections to break down what each concept means, according to previous research conducted.

2.2.1 Brand Image

Brand image has been a researched concept since the mid-50s (Lee, Leung and Zhang, 2000; Malik, Naeem and Munawar, 2012). Gardner and Levy introduced the concept of brand image in 1955 and wrote that the long-term success of a brand depends on the marketer's ability to create and select brand meaning before it enters the market, put the meaning to work in the form of brand image, and then maintaining the brand image over time (Jaworski, MacInnis, and Park, 1986).

Extensive literature exists on the topic of brand image and all of the studies suggest that brand image is at the core of marketing activities; brand image is also at the heart of brand management (Malik, Naeem and Munawar, 2012). Other studies, conducted by Keller (1993) and Zhang (2014), reiterate that brand image is an all-important concept in marketing, and the role it plays in marketing activities, is undeniable. Brand image, according to Lee, James and Kim (2014), assists companies to make better strategic decisions about target market segmentation, and positions the company and products/services in the market.

Even though the construct has been researched since the mid-50s, literature still shows that there is no agreement on one specific definition. The definition of brand image is ever-changing and evolving, much like brand image itself (Keller, 1993; Zhang, 2014; Malik,

Naeem, and Munawar, 2012). Malik et al. (2012) states that brand image's meaning varies from one research study to the next, depending on the research topic. Terminology that is frequently linked to the construct includes brand identity, perceived image, brand personality, brand awareness and brand equity (Keller, 1993; Malik et al, 2012).

This study relates to the definition as given by Bullmore in 1984: "*Consumers' general perception and opinion of a brand's total attributes*" (Zhang, 2015, pp59). This gives insight as to why the public will become loyal to a certain brand (or e-commerce retailer) because of a certain group of attributes that is delivered.

Table 1: The Brand Image as concept in existing brand literature

Perspective	Sources	Definition of brand image
Blanket definitions	Herzog (1963)	Consumers' general perception and impression of a brand
	Newman (1985)	Consumers' perception of a product's total attributes
	Dichter (1985)	Consumers' general impression of the product or service
Meanings and messages	Noth (1988)	The symbolic meaning embedded in the product or service
	Sommers (1964)	Consumers' perception and recognition of a product's symbolic attribute

	Levy (1973)	The symbolic meaning of purchasing the product or service
Personification	Martineau (1957) Bettinger (1979) Sirgy (1985)	Brand image reflects consumers' characteristics, and they purchase the brand to express themselves The personification of a product, which can be manifested as "adult" and "children" Image of the brand resembles human personality
Cognitive or psychological elements	Gardner & Levy (1955) Levy (1978)	Brand image is consisted of consumers' opinion, attitude and emotion toward a brand, which reflects the cognitive or psychological elements of the brand Consumers' overall impression about a brand or product, which includes recognition, feeling and

		attitude toward it
	Bullmore (1984)	Consumers' general perception and opinion of a brand's total attributes
	Kapferer (1994)	Consumers' general perception about the brand feature's association

Source: Zhang, 2015, pp 59.

Garden and Levy writes in their study, which was conducted in 1955, that a brand name is used to differentiate among other players in the industry, but is serves as an intricate symbol that represents the company's ideas and attributes. A brand name builds up a series of ideas and associations in the minds of consumers over a period of time (Lee, Leung, and Zhang, 2000).

2.2.2 Brand Associations (According to Keller, 1993)

When referring to Keller's dimensions of brand knowledge (Figure 1), it states that brand image is a construct constituted and influenced by associations, favourability of types of associations, strength of associations, and uniqueness of associations.

The association types are then divided into non-product attributes and product-related attributes. Benefits – symbolic, functional, and experiential - then also form part of associations. Attitudes is the last component of associations. Product attributes are what is necessary for the product or service to perform in the way the consumer requires. This also varies from brand to brand, and customer to customer.

Non-product attributes are the external functions of the brand's service or product, but it still relates to the purchase consumption. Keller differentiates the four types of non-product related attributes as follows: price information; packaging; user-imagery (which is defined as the type of person that is buying or using the product/service); and usage-imagery.

Usage-imagery is defined as the type of situation where the product or service would likely be used.

Keller follows with a description of what the associations, with regards to favourability, strength, and uniqueness, means – in a brand image context.

Favourability is when consumers believe that a brand satisfies their wants and needs in such a way that it contributes to their overall attitude toward the brand. This can also vary, Keller writes. The situational context is important to consider when the evaluation of brand association is at stake. Consumers may want speedy delivery in one situation, or sometimes speed and efficiency is not their main desire – rather an easy-to-use app or the newest fashion.

The strength of brand associations is in all the information that enters the consumers' memory, and in how that information builds a perception of the brand in the form of brand image. Strength of brand association has to do with how the public or customer recalls the brand, 'top-of-the-mind', spreading of word-of-mouth, and brand knowledge of a consumer regarding the brand. Strength is higher if a customer would tell other consumers about the product, what they have read or whether they should try it out for themselves.

The unique selling point (USP) is a major part of the third dimension of brand association – uniqueness. Keller writes that competitive overlap occurs when product categories are similar. This creates confusion for the customer and sometimes causes the customer to switch brands. For example – a customer could have had a bad experience with the Zando App a while back, but can't remember whether it was Zando or Spree, when looking back at the situation. This causes the customer to wrongfully have a lower brand evaluation of Spree.

Keller writes in his journal *Conceptualizing, Measuring, and Managing Customer-based brand equity*, that there are three benefits that brands can leverage from having a positive brand image. Firstly, brands can ask larger margins and they are more inelastic to price changes. This is because customers are willing to pay a higher price, or even premium price, for a product or service that they can rely on or that is known to have a 'good name'. Secondly, there is an increase of willingness to actively search for the product or brand. In terms of online shopping, this could even mean that a customer would be willing to

purchase the app on the App Store, instead of just downloading it for free. Even online dating sites charge a fee for customers to register, as they are perceived to be a trustworthy site. Thirdly, there is an increase in the effectiveness of the communication activities. A strong, or positive, brand image convinces customers to stay loyal or to start a relationship with the brand and subsequently less effort in attracting and retaining customers, is required.

According to Lee, Leung and Zhang (2000) an inappropriate brand image strategy could be one of the leading causes that a fashion brand struggles in the competitive industry of retail. It is therefore of the upmost importance to understand the brand's target market and their specific need - cater specifically for that, and by these means, create competitive advantage.

2.2.3 Loyalty

Keller (1993) proposed that brand loyalty is when a consumer has such favourable beliefs and attitudes toward a brand that the consumer continuously buys from the same brand. This study further states that when there is an increase of brand awareness and consumers have a positive brand image – the probability of brand choice increases, as well as consumer loyalty levels increase. A positive brand image also decreases the brand or company's risk, with regards to competitive marketing – also explained by the example of the Zando App and Spree mix-up.

According to Merrilees and Fry (2002), corporate branding of e-retailers differs substantially from that of offline, traditional corporations. E-retailers have to be extra cautious when it comes to their brand image, as it has a direct effect on customer loyalty. As e-retailers' entire business is on a screen (unlike other businesses who have extra facets to the business, such as a store in a mall) - a message, such as 'site under construction,' can tarnish a reputation, and loyalty, in an instance. Online shoppers rely on e-retailers to supply them with the most convenient, readily-available service, and any problems can quickly have a negative impact on loyalty.

2.3 E-commerce Industry of South Africa

South African e-commerce businesses struggle with multiple barriers regarding online shopping. Perceptions around security; logistics; the deeply-rooted mall culture; and the incredibly high costs of broadband and internet in South Africa are some of the major challenges are (Bizcommunity, 2017; eNCA Tech Report, 2014; Telkom Business Blog, 2015)

Perceptions around security

Ethical issues in online retail can be seen as a barrier that keeps the public from shopping online. It is critical that companies should address and clarify to customers how they do business and why the customers can, and should, trust them.

Nardal and Sahin (2011) and Streissguth (2017) both argued that theft of information, privacy, poor service (such as delivering damaged or counterfeit goods), security, and reliability, are issues the public of South Africa are concerned with.

Fraudsters are getting exceedingly advanced and tech-savvy with online scams. It is a growing challenge for e-commerce businesses to provide the customer with online payment gateways that are secure (Telkom Business Blog, 2015).

Logistics

By logistics, it means – getting products to the customer, and quicker than the competitor does. Delivering products profitably is another challenge that falls under the “Logistics” category for e-commerce businesses in South Africa. The logistics in South Africa is quite difficult. Kim Reid stated in an interview that South Africa does not have well-established logistic infrastructures and cannot compare, nor compete, with the infrastructures of the UK and North America (eNCA Tech Report, 2014; Telkom Business Blog, 2015).

The online shoppers then face another two dilemmas if the product is not in stock: one – they have already purchased the product, but it will take a considerable time before it is in stock again; and two – even if they have purchased the item, it could take a long time before it is delivered to their door (Telkom Business Blog, 2015).

Mall culture of South Africa

The majority of South Africans still prefer traditional shopping: going to shopping malls or physical space, than online shopping (Telkom Business blog, 2015). World Wide Worx (2017) substantiates the research by Telkom Business Blog, as it states that online retail will only reach 1% of overall retail during 2016. E-commerce in South Africa is then described as “underdeveloped.”

South African consumers still prefer touching, feeling and trying on, and deem this as important aspects of shopping. Customers will even go as far as to browse for a product online, but will make their final purchase in the store (Telkom Business Blog, 2015).

High broadband costs

Bizcommunity (2017) reports that majority of shoppers are using their work Wi-Fi or internet connection to purchase products online. The reasoning is that South Africa has some of the highest call- and connectivity rates in the world.

#Datamustfall is the campaign that started a heated debate among South African consumers. The outcry even ended up as a two-day parliament sitting (Shapshak, T. 2016). High broadband costs is a challenge for e-commerce players, or more specifically for fashion e-retailers in this study, as it forms a barrier to customers who want to shop online, but do not have the luxury of being able to afford expensive data.

Conditions and Trends

PwC (2016) and World Wide Worx (2017) show an increase of growth in the South Africa’s e-commerce sector. PwC’s *Global Total Retail 2016* predicts a compound annual growth rate for the online retail sector of South Africa to be around R9.5bn in 2018. This means that fashion e-retailers will definitely be seeing growth in the future, and will be experiencing an increase in customers.

2.4 Roger's Innovation-Decision Process

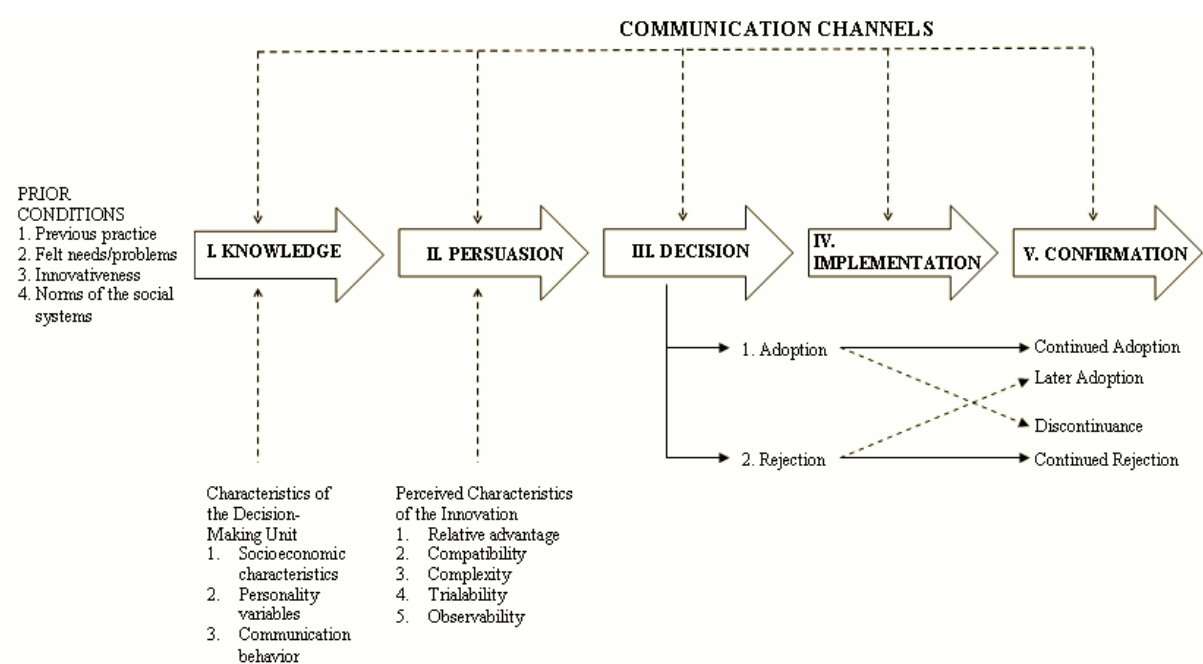
Roger explains that an innovation, no matter how long ago it was invented, is still considered an innovation if people perceive it as “new” (Sahin, 2006). The five stages of the innovation adoption process are knowledge, persuasion, decision, implementation, and

lastly, confirmation. These stages usually follow a chronological order (Rogers, 1983). Before the five stages begin, there are prior conditions that may influence the activation of the process (Sahin, 2006). These conditions include previous practice, felt needs and problems, innovativeness, and norms of the societal system. This study will focus predominantly on felt needs and problems, and the norms of the societal system.

Knowledge is based on the awareness people have about the new technology or innovation, it can also be the exposure people have had to the innovation. Awareness and exposure regarding e-commerce, may have been generated in South Africa over the last couple of years, but it is not yet known how well the public knows the different e-retailing brands.

Persuasion is when the individual has decided whether the innovation is favourable or not. Persuasion is the step where the interest is generated. *Decision* is when the individual has to evaluate whether to adopt the innovation (in this study, e-retailing), or to reject the innovation. The fourth step in the process is implementation. *Implementation* is when the individual has decided to “try” the innovation, or to test it. *Confirmation*, the final step, is the final decision whether to carry on with the innovation, or to reverse the decision. A reversal can occur when the individual develops an unfavourable attitude towards the innovation or has conflicting feelings towards the innovation. In e-retailing, this could be a bad experience with the delivery of a parcel – or even customer service that was not ideal (Rogers, 1983).

Figure 2: The Innovation-Decision Process



Source: Sahin, 2006

Sahin (2006), states that in Roger's argument regarding which communication channel is better between mass media and interpersonal communication, it was concluded that *"interpersonal channels are more powerful to create or change strong attitudes held by an individual."* Rogers is of the view that the diffusion process is an extremely social process which involves interpersonal communication relationships. This study shows that it is an individual's social surroundings and social system that can have the most influential impact on the decisions made by an individual.

3. METHODOLOGY

Research has shown that the measurement of brand image has been a concern for many studies conducted (Malik, Naeem and Munawar, 2012). Malik, Naeem and Munawar (2012) states that researchers are unsure whether to use attitudinal scales or projective techniques. Research suggests that brand image is a subjective construct; as each individual perceives brand image differently, it should be measured at non-verbal and unconscious level.

3.1 Research Design

Qualitative methods, as used in social marketing, helps to demonstrate the meaning people assign to social phenomena and to break down what exactly forms perceptions and ideas, surrounding the concept (Weinreich, 2010). According to Malik et al. (2012), qualitative methods for measuring the brand is the latest trend in the research of brand image. Any method in which the respondent or respondent can convey their true feelings of a lived experience, can make a beneficial contribution to the study. Qualitative research focusses on the “why”, whereas quantitative research addresses correlations between variables (Weinreich, 2010). Even written or oral self-reports can be used – the respondent could write a review of the apps or other attributes (such as price and delivery) about the chosen e-retailers (Waters, 2016). This gives the respondent the liberty to express their true feelings and not be restricted by fixed answers, such as a Likert-scale.

Phenomenology is a variation of interpretivism, as it focusses on experiences, events, human interests and perspectives (Research Methodology, 2016). This choice of paradigm is suited for this study, as it helps understand people’s meanings and perceptions surrounding the brand image and why they are more loyal to, say Superbalist, than RunwaySale. This study is following an ontological position as there no right or wrong answer as different people view topics (such as brand image) differently (Vanson, 2014).

Qualitative techniques can provide a deeper understanding of the consumers’ thoughts. This study follows an exploratory approach to understand the perceptions and phenomena as to what brand image is to the general public and what it means for the customers. This study will be working from an inductive logic standpoint as it is the most suitable for unearthing the phenomena of brand image and customer loyalty in the fashion e-retailing

industry of South Africa. Ethnographic research will be conducted in the sense that the researcher will also participate in the online shopping experience of the four companies to get a deeper understanding of how the different companies operate and what differentiates them (Katila and Laihonon, 2016).

Keller (1993) writes that the measurement of brand image is an indirect approach to measuring customer-based brand equity. He further states that qualitative techniques for the measurement of brand image is the most suitable. Free association techniques where the respondent is asked what the brand means to them personally, but in an unstructured way – such as the conversation-style used in this study – either individually or in small groups, are effective. Questions such as “who, what, where, why and how” were asked to delve deeper into the true feeling of the respondent(s). Keller (1993) mentions projective techniques as the second option of measuring brand image. This technique includes sentence completion, word association and picture interpretation. This type of technique could help if the respondent is unable or unwilling to fully express what they are feeling. The conversation approach could include both techniques to probe more answers.

Keller (1993) argues that scales can be used to measure beliefs and attitudes. Scales were helpful in determining the level of agreement (Zikmund and Babin, 2013; 346-348). Because this study is also concerned with loyalty of the customers towards the specific brand, it was included for further analysis under the quantitative research methods. According to Malik et al. (2012), brand equity, consumer satisfaction, brand loyalty and market performance could all benefit from quantitative methodology, such as traditional questionnaires and Likert-scale types of questionnaires. The results of the survey would form the support for the conversational styled interviews, in the analysis process. The overhead research method is qualitative.

3.2 Research Plan / Research Methodology

This study will focus on conversation style, semi-structured interviews with four users of the four e-retailers (Superbalist, Spree, Zando, and RunwaySale). The conversation-styled interviews will be supported by an online survey of one hundred respondents to give a broader scope and in-depth analysis.

3.2.1 Conversations with four e-retailing users

Conversations (part of the qualitative method of research) will be used to gain considerable insight from the actual users of the fashion online e-commerce shops. According to Zikmund and Babin (2013; 142-148) a conversational approach is appropriate in phenomenology studies as it gains insights from people who have lived through the experience (in this case – online shopping). Respondents will be asked about their feelings toward the brand image, attributes, loyalty, trustworthiness and barriers to online shopping. Questions will include the comparison between the various e-retailers mentioned in this study – this allows the researcher to conclude why some people are more loyal, and why people are less loyal to particular brands. Conversations also follows a more ethnographic research style, which is used in this study, as the researcher emerges herself in the culture / phenomena.

Population:

The respondents will be between the ages of 20 to 30 years old, in the Stellenbosch and Cape Town area (which includes the Northern Suburbs of Cape Town). This age group is specifically useful to this study as prior research shows that South Africa has a very large young e-commerce population. Telkom Business Blog (2015), writes that the e-commerce market largely consists of '*digital natives*', who have grown up with the technical revolution (social media and smartphones). As per Allen (2017), millennials between the ages of 20 and 30 have a high disposable income and are more likely to spend on smaller-item purchases (such as clothing) instead of big items, such as cars or homes.

Sampling:

The sampling process include important and unique steps that each contributes to gathering the necessary information to complete the study about the role of brand image in building a loyal customer base in the South African e-retailing industry of South Africa (Babin & Zikmund, 2013).

Defining the target population:

This diverse group of consumers that's being targeted forms part of the LSM 6-10 group. Millennial consumers (ages 20 to 30 years) forms part of the group just under LSM 6, they normally have enough money for basic needs but not for big luxuries (Allen, 2017). LSM groups 7-10 are consumers that are more financially stable and can afford the products. Clothing prices of different brands differ, and thus the various groups can be targeted. The groups targeted also includes men and women.

Specifying the Sample Frame:

There is no previously made or current frame for this sample available, as well as little or minimum budget to sustain or buy an appropriate list for the sample. Due to the lack of information, all the necessary information will be gathered through various methods. Respondents will play an important role in this study and would be voluntary and kept anonymous.

Non-probability sampling:

Approaches to sampling generally are described as either probability or non-probability sampling. In this study it is not probable that each element in the research population would form part of the study. Therefore, non-probability sampling will be used.

Procedures:

Primary procedures will be selected through the convenience technique and thus consumers in the Western Cape, more specifically Cape Town CBD and Atlantic Seaboard and Stellenbosch, will be selected.

Sampling size:

The aim for this study is to have in-depth conversations with four respondents. Subsequently, it will give the researcher enough data to identify patterns – which is part of the phenomenology research design and plan (Research Methodology, 2016).

Selecting sampling unit:

Fieldwork was conducted by the researcher. Respondents include friends and family of the researcher in the Cape Town / Stellenbosch area and work colleagues at Simonsig Wine Estate. Some of the respondents that were chosen included students from Stellenbosch University. The survey was shared via social media platforms (Instagram and Facebook), and the researcher's Whatsapp groups – including family groups, university groups, friend groups and other groups.

Questions to ask:

These respondents were sampled by use of the convenience sampling method. Respondents will be asked to elaborate on their perceptions of online shopping – whether or not they shop online, reasons why they do / do not shop from the e-retailers; why the respondents prefer one e-retailer to another; what the general perceptions are; why they were / are sceptical of online shopping; what the problems or triumphs are of online shopping; what attributes are worth mentioning of the four companies; and what their general thoughts are on each e-retailer included in this research study.

These patterns can include that one e-retailer is preferred over the other in this specific target market; the different reasons for shopping at the specific e-retailer; who the top-of-mind / dominant brand is in the e-retailing industry – and whether it is one of the four chosen brands, or not; and through sentence completion techniques the researcher can find out what the general perception on the brand image of the population is.

These questions answered the main question / objective of the study – which is how brand image plays a role in building loyal customers in the fashion e-retailing industry of South Africa. The previously mentioned questions gave insight and deeper understanding of the attributes of the e-retailers that the customers enjoy / resonates to most; also which aspects might have the result that they refrain from shopping online. Questions that do not provide answers to the main question and sub-questions (as stated in section 1.5), were not included in the conversation.

Conversations keep the respondents alert, and the researcher can also pick up on cues that are non-verbal. Longer pauses, uncertainty and strong emotions can be observed

during conversations. The problem with conversations, is that it is difficult for the researcher to remain objective. The conversation can also get off-track and lose focus of what is important to this specific study (Zikmund and Babin, 2013; pp.143). These non-verbal cues and unspoken conversation were written down in a transcript for analysis later on in the research process (Hycner, 1985; Chan, Fung and Chien, 2013).

Data analysis techniques:

Hycner (1985) proposes a detailed step-by-step process on how to conduct and analyse data in a phenomenology research study. The researcher must firstly make use of detailed transcription – every single cue (whether verbal or non-verbal) must be written down and recorded. Bracketing is the next step. This involves the openness of the researcher to fully emerge herself into the phenomenon. It also means that the researcher must be mindful of not being too subjective but to listen to the respondent through their experiences and their perceptions (Chan, Fung and Chien, 2013). After transcription and bracketing, the researcher will then “zoom out” to get a sense of the bigger picture or the whole. This means that the researcher will go through the transcripts again to pick up on any themes or patterns that might be evolving.

Condensations of general meaning were drawn up and thereafter any redundant information will be set aside to allow the research to only focus on the relevant information for this study. Clear themes and patterns were noted and an in-depth second analysis provided even further insight. From these patterns and themes, central themes emerged. The researcher then wrote a summary to include all the findings, cues, patterns and central themes that were recorded.

Material / resources used during data collection:

The conversations were held on two different days and all four conversations were recorded on a smart phone. The researcher had Keller's Dimension of Brand Equity model (see Figure 1) in front of her to help guide the questions and stay focused on only the relevant issues concerned in this study. The recordings were saved onto the researcher's laptop for transcription purposes. After the transcriptions were complete – the researcher printed the transcriptions to make detailed notes on the actual paper (See Attached).

Different colours were used to illustrate the different themes and patterns. These themes and patterns were summarised at the end of each conversation.

3.2.2 Survey

Although surveys restrict the respondents' answers in the sense that if it were closed-ended questions, the respondent cannot convey their true feelings, it is able to give a broader understanding (through more respondents) into the phenomena of online shopping. Respondents who do not truly want to partake in the study, could rush the questionnaire and risk respondent errors (Zikmund and Babin, 2013). The survey was set up through the online platform, SurveyMonkey. Nine questions were asked which included seven multi-answer questions, an open-ended question, and a ranking question. All the questions were based on Keller's Model of Brand Equity (See Figure 1) and other existing literature, to be able to correlate with prior research and literature.

3.2.3 The Analysis of the Survey

Section 3.2.3 will provide a further analysis of how, and why, these specific questions were asked.

1. *Do you shop fashion items online?*

The respondents could choose from (Yes), (No), and (No, but I want to try it out). The question is based on Roger's theory of the Innovation-Decision Process (See section 2.4). The addition of the third option "No, but I want to try it out" correlates with Roger's theory of Innovation-Decision Process in the second step, "*Persuasion*" and third step, "*Decision*." This answer will reflect on how many respondents are in these two phases of adopting the innovation - these individuals have decided the innovation is favourable and have made a decision to have a test trial. The respondents who have answered (Yes), is in stage five of the process, "*Confirmation*," and have fully adopted the innovation of online shopping. The respondents who have answered (No) to this question – are either in stage three "*Decision*" – and have rejected the innovation – or in stage five "*Confirmation*." Respondents could either have had a dissatisfying experience in stage three, or decided to discontinue the use of online shopping, or just continued rejection. The latter meaning that the respondent has never tried it, and does not wishes to (Sahin, 2006; Rogers, 1983).

2. Please state why you shop online.

This question follows Keller's Brand Equity Model (See Figure 1). Keller states that Brand Image is a construct of different aspects. Type of Associations were the theoretical foundation for this question. The possible answers (Convenience; Not too many people will have the same item; It works out cheaper; There are great sales offered on e-retailing sites) all correlate with Keller's definition of Brand Image. Price ("it works out cheaper"), and sales all form part of non-product related attributes; whereas, the option "not too many people will have the same item," and "convenience", can be classified as a type of benefit for the consumer.

3. Why are you / were you unsure about shopping online?

This question is concerned with all the scepticism surrounding online shopping in South Africa. Section 2.3 reveals details about South African population and why online shopping has not been adopted throughout South Africa. "I like to try on clothes before I buy it" and "I am not convinced of the quality" correlates with the Mall Culture in South Africa. "I am afraid of online fraud" is an option based on the perceptions around security. "It is too much of a hassle to return items" and "Delivery time takes too long" will give insight about the logistics in South Africa – and the perceptions surrounding it. "Data is too expensive" correlates with the High Broadband Costs section in 2.3. The respondents will give insight as to what is the major reasons why Cape Town residents and Stellenbosch residents are, or were, weary of online shopping.

4. Which one of the following e-retailers has the best brand image? (Which e-retailer do you perceive to be the best in general?)

The reason that there is a second explanatory question included, is to be specific about what definition of brand image the survey is referring to, as there are multiple (Refer to Table 1). This study relates to the definition as given by Bullmore in 1984: "*Consumers' general perception and opinion of a brand's total attributes*" (Zhang, 2015, pp59). The second question provides a more in-depth definition to avoid confusion for the respondents.

5. What do you think are the key non-product attributes of an e-retailer?

As this study is primarily focused on Brand Image (as per Keller, 1993), but more specifically the attributes – the survey had to include a question regarding the specific non-product attributes. Question 2 had a broader focus, thus – a narrower focus would be beneficial.

6. Which one of the following e-retailers are you most loyal to?

The addition of “I buy from the e-retailer that has the item that I like” was to show whether the respondents are “switchers” and not loyal to one specific brand. This then in turn indicates the level of loyalty when one of the other options were selected. If a respondent chose Spree, for example, over the “switching” option – there is a great loyalty towards Spree specifically.

7. Rank the e-retailers you are most likely (1) to buy from to least likely to buy from (4)

The answers to this question will give insight as to where the brands lie in relation with one another. The result will show whether there is a dominant brand, or if there is one brand that is not performing the way the others are. This type of comparison also shows the loyalty towards the “most likely” option.

8. Do you consider an e-retailing app crucial to the convenience of your online shopping experience? Or is a website sufficient?

This question was specifically designed for RunwaySale. RunwaySale is the only e-retailer (between the four e-retailers) that does not have an app – and only operates from the website. The answers to this question will give RunwaySale an indication whether they will benefit from an app, or if the website is sufficient enough. An app is an extension and can build on the brand image through functional benefits and non-product related attributes.

9. What would you like to change / improve on, with regards to online shopping?

This, open-ended, question was designed for the respondents whom is of the opinion that there is something that can be improved with regards to online shopping. This is also a chance for respondents to voice their own opinions and perceptions – as known to a phenomenology study.

Section 4 will interpret all the findings that the survey and the conversations delivered. The findings will be discussed in narrative and statistical format. The correlations to prior literature and theory will be discussed, and in conclusion – the trustworthiness of the findings will be discussed.

4. FINDINGS AND INTERPRETATIONS OF FINDINGS

This section will critically evaluate the findings in the broader context of the research problem. The findings will then be compared to the prior research and theoretical foundation.

4.1 Findings Based on Analysed Data

This section comprises of the analysis of the conversations held with the four respondents. The survey analysis will follow in section 4.1.2.

4.1.1 Narrative format: Conversations

After the transcription and bracketing (refer to section 3.2 'Data analysis techniques'); the cues, themes, and patterns emerged. The themes were divided into four different categories, namely: Loyalty; Brand Image (non-product related attributes and product related attributes); brand recognition and reference framework; and reasons the respondents do not shop or are weary of shopping online.

H. Schaefer: Summary

Schaefer is 22 years of age; she lives and studies in Stellenbosch. She gets a monthly allowance from her parents.

This respondent has not shopped on Zando and RunwaySale before, as she has had too little exposure to the brands (through social media and television advertisements). She mentioned that Superbalist is the brand that is used most frequently in her surroundings and is the top-of-mind, dominant brand.

The respondent is not particularly loyal to a specific brand – yet she is only registered to Superbalist and Spree, and only has the Superbalist App. The respondent states that she likes getting notifications about sales and specials. This could then be interpreted (as she only has the Superbalist app – and through the app get notifications on her phone) that she shops most frequently at Superbalist and could result in a higher customer loyalty towards Superbalist than Spree. Even though the respondent noted that she shops on both the channels (via the website and the app), she mentioned that she likes the notifications and is somewhat unaware of the fact that she has a preference towards using

the app on her phone. E-retailers do let you know via email about sales and specials, but a pop-up notification is instant and easier accessible.

Schaefer (2017) states the reasons why she does not fully adopt online shopping as her only method of shopping for fashion, includes being weary of what she buys, in terms of fit and quality (both product-related attributes). Furthermore, the return process is a “hassle” and prefers to buy in the store for the experience and she can feel the quality and be sure of the fit.

In the conversation, it became apparent that the respondent believes that brand image – through attributes and brand awareness – increases customer loyalty.

M. Cheminais: Summary

Cheminais is 22 years of age; she lives and studies in Stellenbosch. She gets a monthly allowance from her parents.

Cheminais (2017) noted that she is a very loyal Superbalist user and prefers online shopping going to physical stores (offline shopping). Her loyalty towards Superbalist is based on product-related attributes and non-product related attributes (the app). Her loyalty is so strong that she scrolls through the Superbalist app, as one would through social media. Her dislike towards Zando and Spree is based on product-related attributes. This proves the intertwined relationship between brand image and customer loyalty. It can either be a positive relationship, or it can be a negative relationship. If the customer likes the associations that form brand image – the customer loyalty is likely to increase.

Cheminais (2017) shops online because of the convenience, the time-saving factor of it, she does not like malls (offline shopping or physical stores), laziness, the return policy that is efficient, and altogether easiness of online shopping in general. All factors that fit into Keller’s description of what Brand Image is.

A very interesting point that the respondent made– is that Superbalist makes you “cool” if you shop from their site. Superbalist has made it aspirational to shop on their site through the use of their music, models, and television advertisements. Cheminais (2017) stated that Superbalist is “hip and trendy” and creates experiential benefits, which creates a loyalty towards Superbalist.

A. Tshakweni: Summary

Tshakweni is 25 years of age. She lives in Kayamandi, Stellenbosch. She works and has to pay for her own clothing.

The respondent has shopped at Superbalist and Zando before, more so at Zando than Superbalist – but not from Spree and RunwaySale. Tshakweni (2017) shops from Zando and Superbalist because of their differentiated fashion items. These two e-retailers have, in her opinion, more variety of styles and is more fashionable than the items in the physical stores. The motivation to shop online stems from attributes and brand image, as per Keller's definition (1993).

The respondent argues that she is not a loyal customer at any of the four mentioned e-retailers, and that she does switch between the different e-retailers and stores. Tshakweni (2017) mentions price as one of the non-product related attributes that drives her online shopping adoption.

M. Pretorius: Summary

Pretorius has an intense loyalty towards Zando. Her loyalty is largely based on the app and website layout, user-friendliness, and screenshots of the clothing. These attributes are all part of the non-product related attributes. Pretorius also mentions price as one of her motivations as to why she shops at Zando – and is loyal to Zando - instead of Superbalist.

Pretorius (2017) noted that she is registered on RunwaySale, but has yet to make the first purchase. As per Rogers (1983), this respondent is in stage two of the Decision Process. RunwaySale has peaked her interest, but Spree and Superbalist have not. The brand image – customer loyalty relationship is proven again as Pretorius will not shop on Spree and Superbalist (thus not making her loyal), because of their app layout and their prices (non-product related attributes).

Similarities in the conversations:

Schaefer and Cheminais are both students at Stellenbosch University and both of the respondents have a particular fondness or loyalty towards Superbalist. Both respondents mentioned that Superbalist is the dominant brand in their social circles. Whereas

Tshakweni and Pretorius are between the ages of 25 and 30 and have full-time work during the week, and have a particular fondness or loyalty towards Zando. Tshakweni and Pretorius both stated that Zando has cheaper prices and motivates them to shop at Zando. Pretorius stated that she would like to shop on Superbalist, but because of high prices – she does not. This reiterates the role that brand image plays in the customer loyalty in the e-retailing sites in South Africa. Tshakweni and Pretorius are also the only two respondents who mentioned MrPrice as being a competitor to the four e-retailers in clothing styles and price.

The pattern that emerges is that the two working respondents rely on price (non-product related attribute) more than the students do. It could be because the students are not earning their own income yet – but rather lives on an allowance. The two students shop on Superbalist as that is the brand that is dominant in their surroundings and it offers experiential benefit of being “cool” and aspirational.

Patterns such as convenience, laziness, and time constraints were identified with three out of the four respondents (Cheminais, Tshakweni, and Pretorius). All three respondents also mentioned that physical stores are not enjoyable and they prefer online shopping. Schaefer, however, pointed out that she stills prefers offline shopping, as it is a recreational activity.

Cheminais (2017) and Schaefer (2017) both are in the view that changing the perceptions surrounding the lack of trust will increase on online shopping sites. Furthermore, there is a lack of knowledge surrounding the convenience, safety and altogether easiness of online shopping. Both respondents are of the opinion that if the registration process is advertised as easy and convenient, more people will be persuaded to shop online.

One of the most consistent findings in all four conversations was the lack of knowledge and awareness regarding RunwaySale. Not one of the respondents have shopped from RunwaySale. Schaefer (2017) mentions RunwaySale once, only after the researcher had asked her a question about it. Cheminais (2017) stated that she “didn’t know RunwaySale or whatever, was a thing – I’ve never heard of it.” When Tshakweni was asked about the four e-retailers, she repeats all but RunwaySale (Tshakweni, 2017). Pretorius is the only one of the four respondents that is registered at RunwaySale and subscribed to their

newsletter; however, when asked about the four e-retailers, she mentioned Zando, Spree and Superbalist and replied “Which was the other one you called” (Pretorius, 2017).

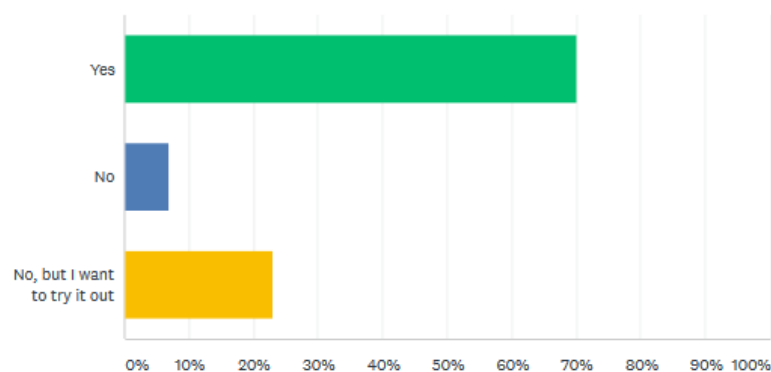
4.1.2 Statistical format: Survey

Each question from the survey will be analysed separately, which then will be concluded in broader terms in section 4.2. (Refer to Addendum C for the full SurveyMonkey Survey).

Image 1: Question 1

Do you shop fashion items online?

Answered: 100 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	70.00%	70
No	7.00%	7
No, but I want to try it out	23.00%	23
TOTAL		100

Source: Surveymonkey, 2017

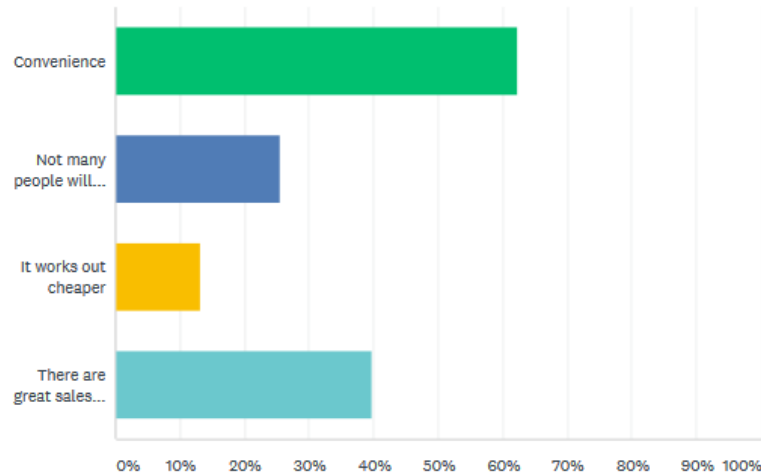
The response to question one shows that the majority (70%) of the respondents shops online – and is at stage five of Roger’s model of Innovation-Decision Process. Seven respondents do not shop online, and continues to reject the innovation of online shopping – and there is no indication of possible adoption. (23%) of respondents have stated that shopping online is imminent. This percentage correlates with the estimated growth that the online shopping industry in South Africa will experience according to PwC (2016) and World Wide Worx (2017).

It can then be concluded that the majority of 20 to 30 year old’s are actively engaged in e-retailing, with another (23%) to follow shortly.

Image 2: Question 2

Please state why you shop online.

Answered: 98 Skipped: 2



ANSWER CHOICES	RESPONSES	
Convenience	62.24%	61
Not many people will have the same item	25.51%	25
It works out cheaper	13.27%	13
There are great sales offered on e-retailing sites	39.80%	39
Total Respondents: 98		

Source: Surveymonkey, 2017

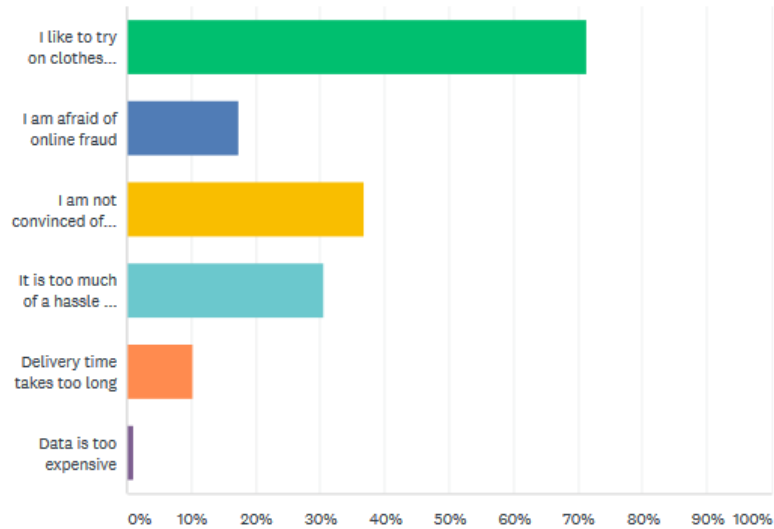
Convenience (62.24%) was the rated as the number one reason why people shop online – according to 98 respondents in the Stellenbosch and Cape Town area. Sales (39.80%) was the second largest motivation as to why people shop online, followed by the uniqueness of the item (25.51%), and lastly, because of total cost (13.27%). People may have the perception that because of shipping fee that is asked of online shopping, shopping in a store works out cheaper. It could also be that the respondents are not concerned with cost as it is not a priority to them – as the respondents are of a higher LSM group.

Convenience, a functional benefit (as per Keller, 1993) must be advertised by the e-retailers as this is the biggest motivation behind online shopping, as perceived by the consumers.

Image 3: Question 3

Why are you / were you unsure about shopping online?

Answered: 98 Skipped: 2



ANSWER CHOICES	RESPONSES
I like to try on clothes before I buy it	71.43% 70
I am afraid of online fraud	17.35% 17
I am not convinced of the quality	36.73% 36
It is too much of a hassle to return items	30.61% 30
Delivery time takes too long	10.20% 10
Data is too expensive	1.02% 1
Total Respondents: 98	

Source: SurveyMonkey, 2017.

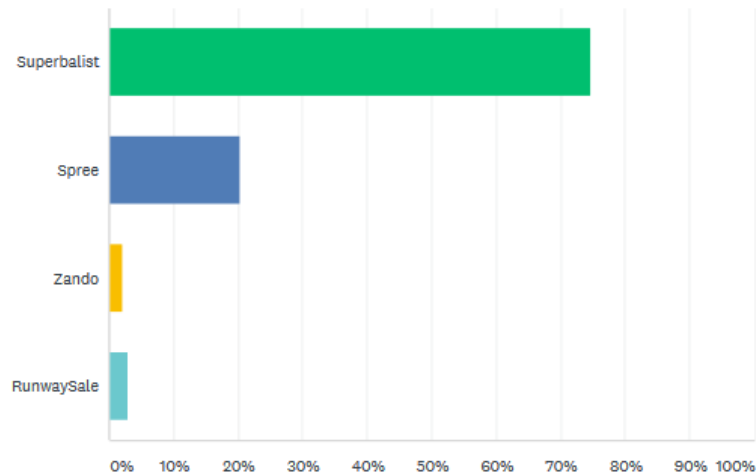
“I like to try on clothes before I buy it” was the option that respondents felt the strongest about. Previous research identified “the embedded mall culture” as one of the reasons South Africans do not shop online. The analysis of data in this study substantiates this concern of the general public between the ages of 20 and 30 that South Africans still prefers to touch, feel and try on the clothes before they make a purchase. The “mall culture” questions amount to the two highest percentages with (71.43%) and (36.73%). The survey results support the prior research stated in Section 2.3 – except high broadband costs.

Research also identified high broadband costs as one of the reasons restricting South Africans from shopping online. The results of the survey, however, disagrees. Of 98 respondents, only one respondent indicated that data is too expensive.

Image 4: Question 4

Which one of the following e-retailers has the best brand image? (Which e-retailer do you perceive to be the best in general?)

Answered: 99 Skipped: 1



ANSWER CHOICES	RESPONSES
Superbalist	74.75% 74
Spree	20.20% 20
Zando	2.02% 2
RunwaySale	3.03% 3
TOTAL	99

Source: SurveyMonkey, 2017.

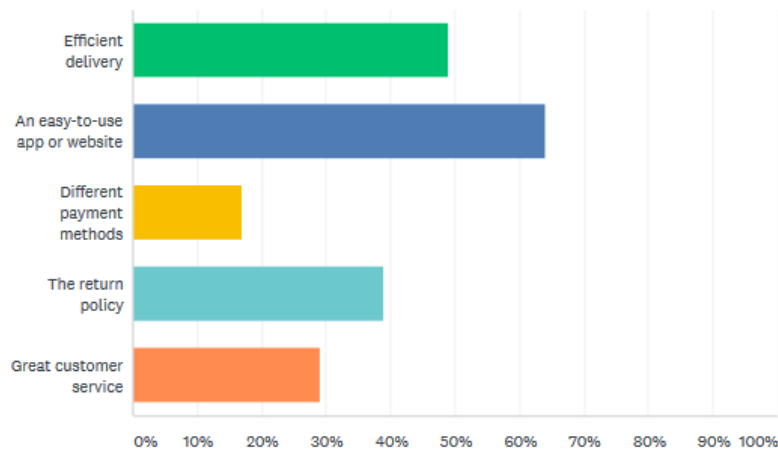
Superbalist, according to the definition by Bullmore in 1984, has the best brand image by a staggering (74.75%) – a clear indication of being the dominant brand in this study. Spree, the second best, with a percentage of (20.20%). Zando and RunwaySale, with one respondent difference, with a percentage of (2.02%) and (3.03%).

A conclusion can be made that Superbalist has the strongest brand image for the population between the ages of 20 to 30 years. RunwaySale and Zando are in close competition, with Spree closer to RunwaySale and Zando, than it is to Superbalist.

Image 5: Question 5

What do you think are the key non-product attributes of an e-retailer?

Answered: 100 Skipped: 0



ANSWER CHOICES	RESPONSES	
▼ Efficient delivery	49.00%	49
▼ An easy-to-use app or website	64.00%	64
▼ Different payment methods	17.00%	17
▼ The return policy	39.00%	39
▼ Great customer service	29.00%	29
Total Respondents: 100		

Source: SurveyMonkey, 2017.

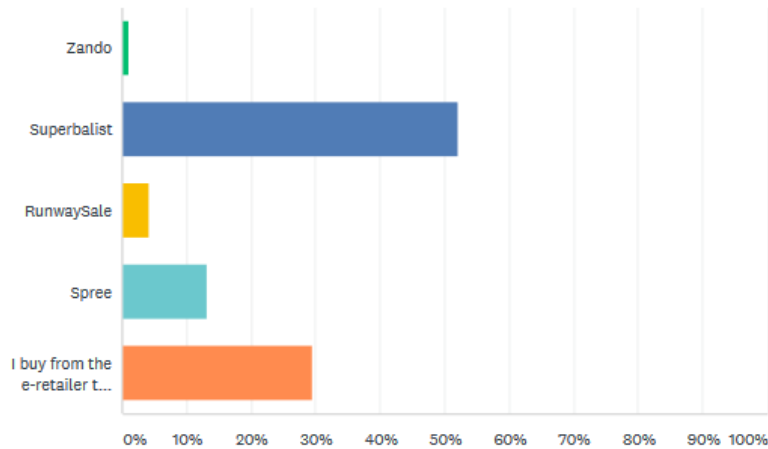
An easy-to-use app or website is the most important non-product attribute that contributes to building brand image, with a percentage of (64%). Different payment methods were rated as the least important non-product related attribute of an online e-retailer, with a percentage of (17%). Efficient delivery (49%), the return policy (39%), and great customer service (29%) all varied with a (10%) difference.

Merrilees and Fry's (2002) study provides theoretical background to support the results shown in Image 5. The study stresses the importance of the app and website for e-retailers, as it is the most important contact point for the business. If something goes wrong with the app or website – it has a negative effect on their brand image, and ultimately – the customer loyalty.

Image 6: Question 6

Which one of the following e-retailers are you most loyal to?

Answered: 98 Skipped: 2



ANSWER CHOICES	RESPONSES	
▼ Zando	1.02%	1
▼ Superbalist	52.04%	51
▼ RunwaySale	4.08%	4
▼ Spree	13.27%	13
▼ I buy from the e-retailer that has the item I like	29.59%	29
TOTAL		98

Source: Surveymonkey, 2017.

51 respondents, out of a possible 98 respondents, are loyal to Superbalist. This supports the argument that there is a correlation and relationship between brand image and customer loyalty. Question 4's results states that Superbalist has the best brand image – and consequently, has the most loyal customers. The relationship can be carried throughout – Spree had the second highest brand image rating, and of the four e-retailers, has the second highest customer loyalty. Zando and RunwaySale – again in tight competition – had the lowest brand image rating, and ultimately also the lowest customer loyalty.

The addition of the “switching” option – has shown an interesting pattern. The brand image question (Question 4) showed Superbalist with 74 votes, and Spree with 20 votes. There was one more respondent that answered the question in Question 4 – but the switching

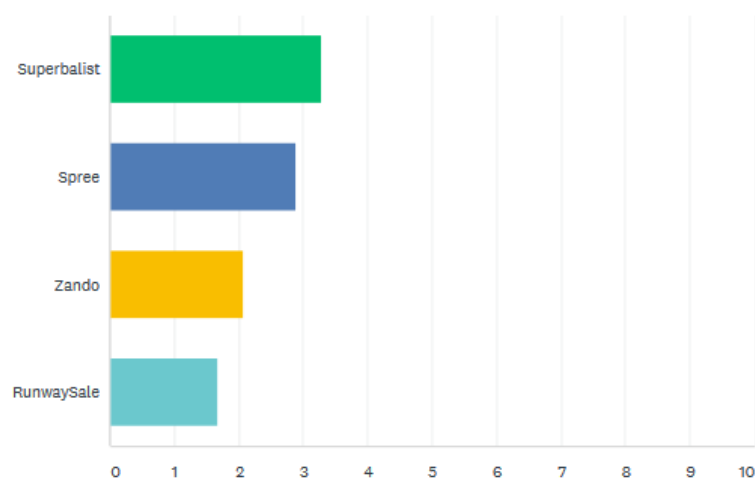
number more or less amounts to the difference between Question 4 and Question 6's number of votes.

Superbalist 'lost' 23 votes in the customer loyalty question; Spree 'lost' 7 votes in the customer loyalty question (in comparison to the brand image question) – with the addition of the switching option. This shows that even though Superbalist has the best brand image – and customer loyalty – their customer base will be most likely to shop wherever they find an item they like.

Image 7: Question 7

Rank the e-retailers you are most likely (1) to buy from to least likely to buy from (4)

Answered: 99 Skipped: 1



	1	2	3	4	TOTAL	SCORE
Superbalist	61.05% 58	21.05% 20	4.21% 4	13.68% 13	95	3.29
Spree	23.40% 22	47.87% 45	23.40% 22	5.32% 5	94	2.89
Zando	4.30% 4	21.51% 20	51.61% 48	22.58% 21	93	2.08
RunwaySale	10.53% 10	8.42% 8	20.00% 19	61.05% 58	95	1.68

(SurveyMonkey, 2017)

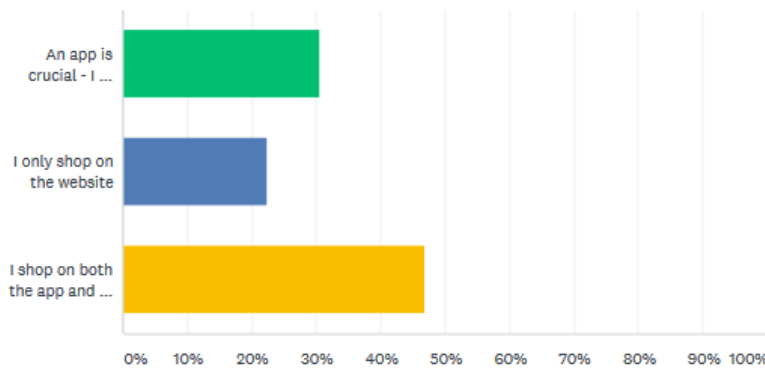
This question showed that Superbalist and RunwaySales are the extreme cases on the opposite ends. 58 respondents, out of a possible 99 respondents, indicated that they would most likely shop at Superbalist – whereas 58 respondents indicated that they are least likely to shop from RunwaySale. Spree is most likely to be the second choice of e-

retailer to be purchased from, and Zando is most likely to be the third option. Spree is an interesting e-retailer – as the results show that it is always the middle choice – yet Spree has the lowest amount of votes for “least likely” to shop at.

Image 8: Question 8

Do you consider an e-retailing app crucial to the convenience of your online shopping experience? Or is a website sufficient?

Answered: 98 Skipped: 2



ANSWER CHOICES	RESPONSES	
▼ An app is crucial - I do not shop on the website	30.61%	30
▼ I only shop on the website	22.45%	22
▼ I shop on both the app and the website	46.94%	46
TOTAL		98

Source: Surveymonkey, 2017

The results show that the majority (46.94%) out of a possible 98 respondents, shop on both the app and website. This question is specifically aimed at RunwaySale, as the e-retailer only has a website. The results show that it is not necessary for the company to invest in the development of an app – although it can only add to growing the business. (30.61%) of the respondents are of the view that an app is critical to the success and overall enjoyment of online shopping. And only (22.45%) of the respondents shop exclusively on the website.

The results show that it would be beneficial to have both the app and the website to accommodate all the users' needs and desires – but a website is sufficient enough.

Image 9: Question 9

What would you like to change / improve on, with regards to online shopping?

Answered: 79 Skipped: 21

RESPONSES (79) TEXT ANALYSIS MY CATEGORIES

Categorize as... Filter by Category Search responses ?

Showing 79 responses

I can't say much, I don't really shop online yet.
10/4/2017 6:18 PM [View respondent's answers](#)

More options from different retailers
10/4/2017 5:42 PM [View respondent's answers](#)

Better size matching with regards to pants
10/4/2017 5:21 PM [View respondent's answers](#)

They should have more items of the smaller sizes, as these tend to sell out faster.
10/4/2017 5:14 PM [View respondent's answers](#)

Customer service
10/4/2017 5:12 PM [View respondent's answers](#)

Source: Surveymonkey, 2017.

Out of the 79 responses, there were five categories in which the responses were divided into. The actual user-friendliness of the app and website; products and greater variety; increased payment options; improved logistics; and more competitive prices. All of these categories fit Keller's (1993) definition of attributes and what defines brand image.

If these attributes were to improve it would lead to an increase in customer satisfaction, and ultimately – customer loyalty.

4.2 Correlations with Prior Literature / Theory

Schaefer (2017) conveyed that she is weary of what she shops online. This is proof that there is still that intrinsic motivation to rather be safe in what to buy online, than to fully adopt the online shopping innovation. *“Just because, I personally don't feel like going about the admin – I think a lot of people feels the way, to rather go to the store, try it on – you know, it's part of the whole experience ‘going for an outing’ and buying it then”*

(Schaefer, 2017). This perception is parallel to the prior research about the embedded mall culture in South Africa. South Africans want to touch, feel and try the item on (Telkom Business Blog, 2015).

As per Keller (1993), the unique selling point (USP) is part of the uniqueness of the brand association. Competitive overlap can occur in e-retailing, as the companies offer similar products in the same category. In conversation with Tshakweni (2017), the importance of having unique – and distinguished – USP's became apparent. At first, the respondent said that both Superbalist and Zando have free shipping fee (when purchasing over a specific amount). The respondent changes her mind, or gets confused, later on in the conversation. Tshakweni (2017) states that only Zando has “free shipping” and that is one of the reasons why she is loyal to Zando, instead of Superbalist.

Pretorius (2017), states that with her first purchase with Zando, her item broke. As per Rogers (1983), Pretorius was in stage 3 of the Innovation-Decision Process. The respondent was faced with the decision as to accept or reject the innovation. The customer service and return policy of Zando (non-product attributes, as per definition by Keller) was favourable – and the respondent continued to become a loyal customer to Zando.

Tshakweni (2017) states that she shops predominantly online at her work, because of connectivity issues at her home. This finding correlates with Bizcommunity (2017) as it reports that majority of shoppers are using their work Wi-Fi or internet connection to purchase products online.

As phenomenology is concerned with personal perceptions and feelings – not many answers will be the same. Tshakweni (2017) and Cheminais (2017) provide further insight as to how personal perceptions can be. Cheminais (2017) states that she shops predominantly on Superbalist as you *“have to [go] through so much that you do not like that it is not worth the hassle to me”* on Zando's site. Cheminais reasons that Zando has too many options to choose from, and none that really appeal to her. Whereas Tshakweni (2017) states that *“Superbalist has got everything but there is some ‘stuff’ that they do not have, that I actually get from Zando.”*

Pretorius (2017) states that she would like to shop at Superbalist, but the prices are too high, yet Superbalist achieved the highest score in the brand image and brand loyalty questions. This finding is in agreement of Keller's (1993) argument that when a brand image is perceived as the best, or is positive, larger margins can be asked and they are more inelastic to price changes. This is because customers are willing to pay a higher price, or even premium price, for a product or service that they can rely on or that is known to have a 'good name'.

4.3 Trustworthiness of Findings

Qualitative data is concerned with the trustworthiness of findings, rather than the validity and reliability. Trustworthiness is a construct – consisting of four components: credibility, transferability, dependability, and confirmability (DeVault, 2017).

4.3.1 Credibility

As per DeVault (2017), triangulation is the primary method used to address credibility in qualitative studies. Triangulation is accomplished by asking the same research questions of different respondents and by using more than one source or method to answer the research question. In this study, two methods were used to answer questions: conversation and a survey. In total there were 104 respondents. Each respondent was asked about brand image and loyalty. These answers were condensed into a summary in order to answer the research question, and therefore, credibility was achieved.

4.3.2 Transferability

Qualitative studies rely heavily on the interpretation of the findings of the researcher. The conversations that were recorded, can be listened to again by another researcher – and could possibly get the same, or different results. The survey could be sent out by a different researcher, who could be in different surroundings and could get completely different results. This study was mostly based on convenience-sampling methods. If another researcher had to choose a different sampling method, the results could vary.

4.3.3 Dependability

This study is based on the seminal work of Keller (1993) and other prior research. Most of the survey questions are based on the Dimensions of Brand Equity (see Figure 1), and the rest were based on building on the argument of previous research and therefore made it important for the data categories to be internally consistent (DeVault, 2017). Categories of brand image, brand loyalty, and attributes were consistent throughout the study. This provides the basis for later tests of replicability, which in return, creates a trustworthy result.

4.3.4 Confirmability

Bracketing was used as a method to keep the researcher mindful of not being too subjective, and have too much influence in the outcome of the findings. The researcher took all the precautionary measures to record all the notes (see Attached: Analysis of Transcriptions) and record all the conversations to confirm the reliability of the study. The respondents of the conversations had to sign a letter of agreement (see Attached), providing evidence that the ethical considerations were taken seriously and to provide evidence that the conversations were not held by fictional characters.

5. RESEARCH CONSIDERATIONS

This section will provide an indication of how the research question was answered, the research problem was solved and the research goal was reached.

When referring back to the research questions and sub-questions, the respondents in both the survey and conversations answer the questions similarly and in agreement to the previous research conducted. The sub-questions' answers will ultimately lead to the development of an answer to the main research question and problem.

What are the attributes (both product - and non-product related) that contribute to brand image and to ultimately building a loyal customer base?

The theoretical foundation of Keller's (1993) study provided insight as to what types of product – and non-product related attributes could be applicable in this study. The most frequent answer from the survey concluded that the app or the website of the e-retailer is the most important attribute. The wording “an easy-to-use” provides further insight as to why the respondent's would choose this option as their first, and most important, choice. As mentioned above (Section 4.1.2 – under Image 5: Question 5), Merrilees and Fry's (2002) study argues that a screen (of an app and website) is the most important factor of the business to build brand image and ultimately lead to customer loyalty. An important answers from the survey show that sales – the decrease in price – is an attribute to why they will be loyal on e-retailing sites. Efficient delivery, the return policy, and great customer service would build a loyal customer base.

The conversations and surveys' results shows that (as per Keller, 1993) the number one reason for shopping online is the functional and experiential benefit of convenience. Thus, brand image –through the brand association: benefits - contributes to their customer loyalty.

How does brand image help customers overcome barriers to shopping online to ultimately build a loyal online customer base?

The respondents in the survey, and Schaefer (2017), states that the crucial factor of being unsure of online shopping is the embedded mall culture of trying on clothes before deciding on the purchase. It is also about the recreational experience of going to physical

stores. Schaefer (2017) and Cheminais (2017) argues that the increase of knowledge and awareness in the convenience and user-friendliness of e-retail in South Africa, will increase the customer base. The previous sub-question gives insight as to how much the respondents favours the convenience of e-retail, therefore, as per Rogers (1983), communicating the convenience and creating awareness surrounding e-retail will ultimately lead to adoption and a loyal customer base. The third step (decision) in Roger's model is crucial to the success of the online retailers. This is where the customers can choose to adopt or reject online shopping. Excellent attributes (product, delivery, an easy-to-use app and website, a good return policy, and price) will increase the chances to adopt online shopping and it will ultimately lead to the confirmation, or adoption, of online shopping and create a loyal customer base for e-retailers in South Africa.

What role does brand image play in building a loyal customer base in the fashion e-retail industry of South Africa?

The two sub-questions builds the argument for the answer of the research question in this study. Through prior research, the theoretical foundation and the primary research conducted in this study, the role that brand image plays in building a loyal customer base in the fashion e-retail industry of South Africa, becomes clear. Brand image and customer loyalty is an intertwined relationship. If the brand image (in the eyes of the consumer), is favourable, there will be an increase in customer loyalty towards the specific e-retailer in question. If the brand image (in the eyes of the consumer), is unfavourable, there will be a lack of customer loyalty towards the specific e-retailer in question. Brand image – with strong focus on the types of associations (more specifically: attributes and benefits) – is directly linked to customer loyalty. The role is undeniable and has a great impact on the customer base and the level of loyalty.

5.1 Implications of Findings for Future Practices

This study provides evidence, with theoretical background, of the importance of brand image when building a loyal customer base in the South African e-retailing industry. The survey and conversations provided a sound dashboard in the understanding of how people perceive online shopping, loyalty, and the key attributes of e-retailing sites.

The most important contribution of this study is providing the public, including e-retailers, a deeper understanding of online shopping, as experienced by the customers of four e-retailing players in the South African e-commerce industry. Online retailing in South Africa is at the cusp of massive growth, and further insight into what companies can achieve with their brand image can benefit not only existing e-retailing companies, but prospective companies and companies in the e-commerce industry. A loyal customer base is of great value to businesses – a way to build strong brand equity, suggests Keller (1993) – and a deeper understanding from the minds of actual customers can help achieve a strong brand equity.

The implication of the findings for future practice will be beneficial for the companies. This study provides a deeper understanding as to where e-retailers can improve on to ultimately build a loyal customer base. The contribution will be for the companies, but from the perspective of customers – using Keller’s model of customer-based brand equity – to achieve deeper understanding and gain knowledge to create company-based brand equity as well.

5.2 Heuristic Value

As the research question – and the sub-questions were answered, this research study can be deemed a success. The findings were not only insightful, but could also be substantiated by prior research and the seminal work of Keller (1993). The key findings are concise and specific to this study but there were more findings that were discovered through the research that could be focussed on for future studies. The further investigation into the motivation behind “switching” could be an interesting topic for a study in the future.

5.3 Ethical Considerations

Walker (2007) is of the view that the two most fundamental ethical principles of a phenomenology study are beneficence and non- maleficence; the latter meaning “do no harm.”

Respondents were selected and approached on a friendly and accessible manner. They were given the option to have the conversation. If the respondents choose to do so, they were informed that all their information will be kept anonymous. The respondents were

given a short contextualisation and thanked for their time and willingness. The respondents of the conversations were made aware that the conversations were recorded and that they had to give vocal permission to do so (See Addendum E).

Ethical issues during a research study of this kind is about letting the respondents of the questionnaire know that all the information gathered, is kept completely safe and confidential. Other ethical issues are leading- or loaded in the conversations. The respondent should be aware that the answers to the questions will not be used for marketing or sales attempts, and is strictly for research purposes. Questions should not provoke uncalled-for feelings or upset the respondent. The respondent should also feel free to stop the conversation for any given reason. The researcher must also be upfront about how much time the respondent will be busy with the study.

Interviews with respondents should not reflect the researcher's personal view and no discriminatory questions should be asked. The respondents should not feel pressured in any way to answer a question just to please the researcher- this issue will also create an error in the data collected.

As this is a qualitative study, the researcher must be continuously aware of the fact that s/he must use bracketing (as explained in section 3.2).

5.5 Limitations and Suggestions

Time is going to be one of the limitations in this study as there is a due date and cannot lend itself to a longitudinal study. Because of the deadline, information cannot be gathered for more than eight months. The more time the researcher has, the more in-depth the research can be and more information could emerge.

Another limitation is the lack of a qualified focus group administrator. The use of focus groups can be very beneficial to a phenomenology research study and could have unfolded even more aspects of the topic.

Money and other resources were limited. With enough resources, the researcher could have gotten the list of subscribers to each e-retailer and have had conversations with those people. This population would be less homogenous and it would represent a larger group or population that just a convenience sampling method. If time and money were not

limited, the sample size could also be more beneficial to get a wider and more representative view or insight.

A number of studies have been conducted related to the concept of brand image, brand knowledge and brand attributes. However, there still are some uncertainties about what is the best, or most effective way of measuring these aspects. The uncertainty, or lack of agreement, on the definition of brand image makes it difficult to pin down and work from one viewpoint.

E-retailing is a relatively new concept, or in South Africa at least, which leaves a lot of space and opportunity for other studies to be conducted. Studies focused on the logistical infrastructure; a larger study focussing only on barriers; a further investigation on the 'imbedded mall culture of South Africa' – such research could be interesting and would give further insight into the culture within South Africa. Many articles are available about e-commerce, but not necessarily focussed on South Africa- or fashion e-retailing in South Africa.

As per Chan, Fung and Chien (2013), the reliability of the study will be increased if an independent judge was to verify the information marked as "relevant" in the analysis of the conversations. As there was only a limited amount of time, due to the due date of this study – the information could not be verified. Future studies could put emphasise on the importance of the reliability of the data, through the appointment of an independent judge.

A more representative selection can be made when selecting respondents for the conversation. Male and female respondents, and not only female respondents, could give more insightful findings and analysis.

Too many leading – or guiding – questions were asked in the conversation, as the researcher is familiar with all the respondents and was difficult to stay objective.

SurveyMonkey also restricted the amount of questions to nine, which could be expanded on in the future. By asking more questions, and seeing if a similar question results in similar answers, will test the reliability of the respondents' answers.

6. CONCLUSION

The existing literature on this study's topic provides a sound theoretical background from which this study can gain insights from. Measurement procedures and paradigm information from previous studies clarified some uncertainty surrounding the methods to use in this specific study. The previous research outlined that brand image is subjective and perceived differently in each individual mind and therefore the study should follow qualitative research methods.

Research also shows that e-commerce fashion retailers' struggles to compete with the offline retailers, in the sense that online stores have more barriers than offline stores. It therefore it is extremely important for online retailers to perfect their brand image in order to build loyal customers.

As this study explored how fashion e-retailers create a loyal customer base through different attributes and brand image, secondary research provided the foundation on which the primary research could be built on to further support the argument.

The purpose of the proposed study was to explore how fashion e-retailers create a loyal customer base through different attributes and brand image. The focus was on how fashion e-retailers in South Africa (specifically Superbalist, RunwaySale, Spree and Zando) build brand image and how the brand would have to rely on brand image elements, with a strong focus on brand attributes - and how these e-retailers are overcoming the barriers of e-commerce to build and maintain a loyal customer base.

The conclusion is that the role in which brand image plays in creating a loyal customer base in the fashion e-retail industry of South Africa, is undeniable. The relationship between brand image and customer loyalty is intertwined. Brand image influences customer loyalty, and customer loyalty influences how customers perceive the brand image.

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ADDENDUM LIST

Addendum A: Letter of Agreement

Dear Respondent

I am an honours student from Vega School of Brand Leadership in Cape Town. For my thesis, I am conducting a study to explore the role that brand image has on building a loyal customer base in the South African fashion e-retailing industry.

By signing this letter of agreement you are agreeing to take part in the study and are aware of the following:

- This study will only be used for research purposes only, not marketing or sales attempts.
- Your response will stay anonymous and confidential
- The duration of this conversation will be no longer than 10minutes
- If you are uncomfortable with any questions asked, please do not to answer
- There is no right or wrong answer. Please answer as truthfully or appropriately as possible.
- You may stop at any time.

Thank you for your participation and time.

Email/ cell number:

Signature: Date:

Addendum B: Ethics Clearance Letter

Ethics Clearance Letter 30 July 2017

Dear Ms Malan

ETHICAL CLEARANCE LETTER

Your research proposal and ethical considerations were reviewed by your supervisor and moderated by the campus research panel.

☒

Your research proposal posed no significant ethical concerns. We hereby provide you with ethical clearance to proceed with your research methodology.

OR

☐

Your research proposal posed minor concerns (see below):

Please discuss with your supervisor how your research design will address this issue.

The concerns included:

In the event of you deciding to change your research methodology in any way, kindly consult your supervisor to ensure all ethical considerations are adhered to and pose no risk to any respondent or party involved. A revised ethical clearance letter will be issued.

We wish you all the best with your research!

Supervisor Name: HF Conradie

Campus Anchor Name: Dr F Cronje

Supervisor Signature: **HF Conradie**

Campus Anchor Signature



Addendum C: Questionnaire

E-retailing in South Africa

The role brand image plays in building customer loyalty in the fashion e-retail industry of SA

The purpose of the proposed questionnaire is to explore how fashion e-retailers create a loyal customer base through different attributes and brand image. The focus will be on how fashion e-retailers in South Africa (specifically Superbalist, RunwaySale, Spree and Zando) build brand image and how the brand would have to rely on brand image elements, with a strong focus on brand attributes - and how these e-retailers are overcoming the barriers of ecommerce to build and maintain a loyal customer base.

Thank you so much for your participation! This survey will not take you more than 7 minutes. Your response will stay anonymous and confidential.

IF YOU ARE NOT BETWEEN THE AGES OF 20 - 30, PLEASE DO NOT ANSWER THIS SURVEY

1. Do you shop fashion items online?

- ☐ Yes
- ☐ No
- ☐ No, but I want to try it out

2. Please state why you shop online.

- ☐ Convenience
- ☐ Not many people will have the same item
- ☐ It works out cheaper
- ☐ There are great sales offered on e-retailing sites

3. Why are you / were you unsure about shopping online?

- | | |
|---|---|
| ☐ I like to try on clothes before I buy it | ☐ It is too much of a hassle to return items |
| ☐ I am afraid of online fraud | ☐ Delivery time takes too long |
| ☐ I am not convinced of the quality | ☐ Data is too expensive |

4. Which one of the following e-retailers has the best brand image? (Which e-retailer do you perceive to be the best in general?)

- ☐ Superbalist
- ☐ Spree
- ☐ Zando
- ☐ RunwaySale

5. What do you think are the key non-product attributes of an e-retailer?

- ☐ Efficient delivery
- ☐ An easy-to-use app or website
- ☐ Different payment methods
- ☐ The return policy
- ☐ Great customer service

6. Which one of the following e-retailers are you most loyal to?

- ☐ Zando
- ☐ Superbalist
- ☐ RunwaySale
- ☐ Spree
- ☐ I buy from the e-retailer that has the item I like

7. Rank the e-retailers you are most likely (1) to buy from to least likely to buy from (4)

⋮	Superbalist
⋮	Spree
⋮	Zando
⋮	RunwaySale

8. Do you consider an e-retailing app crucial to the convenience of your online shopping experience? Or is a website sufficient?

- ☐ An app is crucial - I do not shop on the website
- ☐ I only shop on the website
- ☐ I shop on both the app and the website

9. What would you like to change / improve on, with regards to online shopping?

*The link to the survey is available per request of the researcher.

Addendum : Transcriptions of Conversations

Conversation 1: H. Schaefer

(from Stellenbosch)

Lisa-Jean (L): Okay, just to be clear, I am recording you and you are giving me permission to do this?

Helene (H): I am...

L: For my thesis! Um, so it is just basically about telling me how you are experiencing online shopping with regards to Zando, Superbalist, Spree and RunwaySale. Is there any one of those retailers that you haven't shopped from?

H: (Nods in agreement) Hmm! I haven't shopped from RunwaySale and Zando.

L: Is there a reason for that?

H: (Shakes head) hmm, not particularly

L: Do you think that they are not umm, not "out-there" enough with their brand? Or wouldn't you say that?

H: Ummm, I think I just have had more exposure to um Superbalist and uh Spree – just in terms of ads on TV, and like on my Newsfeed, ads on Facebook, ja – I just think (hesitation) that is probably the reason why.

L: (Repeating) So just basically advertisement and exposure?

H: Ja, and... I think between my friends, Superbalist, like that's the main one, you know, everyone uses, in the environment that I go about my daily life.

L: And would you say that in, in your daily life, um... being classified as a millennial, (Helene nods in agreement) you are how old?

H: uhh, 22.

L: (Repeating) 22. (Helene giggles)L: So in our daily life, would you say that you are more on your phone or on your, um, laptop or computer?

H: Umm, definitely a lot on my phone, but I do spend some time on my computer- in terms like (break) for studies and work type of things. And there is always the Facebook window (tab) is always open (Lisa-Jean “Ja”) next to my work (insinuates tab).

L: So you’d see Spree or Superbalist or other e-retailing ads on your computer as well?

H: Ya

L: And would you say that you are particularly loyal to one specific e-retailer or are you a switcher (casual word referring to switching of brands – no particular loyalty)?

H: Um, (thinks...) I don’t think (thinks) I just like, it sounds like a hassle to re-register and create a new profile on the one... the two that I haven’t shopped on. So I think it is just something I don’t look at. Um... but I am not particularly loyal for a reason (Lisa-Jean “ya” in agreement) to Superbalist, for example.

L: Would you say that there are specific things that you are fond of, um... of Superbalist instead of Spree, for example?

H: hmmm (Thinks) I, honestly, I don’t have the Spree App, I have the Superbalist App (Lisa-Jean “okay”). So maybe it is just the fact that I don’t have it (referencing to the Spree App) (Lisa-Jean “ya”), I dig the... the... (giggles)... (Interrupts herself) I am a sucker for a sale. (Lisa-Jean “ya” in agreement). So if the... the notifications that says “okay you’ve got so many hours and uh, 30% off on this” that, I like that.

L: And would you say that is because you are um, still a student or are you just particularly fond of sales in general (Lisa-Jean’s tone of voice changes to more up-beat)? (Helene laughs)

H: I think, I think that won’t change, even if I’m um, even if I’m not a student anymore. I’ll still be a sucker for a sale. Umm, ya, that’s probably the reason. Just the – ya the sales things.

L: What would you say is something that any e-retailer can work on, to increase loyalty?

H: oooh... (Laughs) [Silence]. I think – in terms of loyalty - I... to, to get more people to sign up – I think, if you, like they advertise the signing up as easy and it's hassle free; that would like be a good start, and just constant, like reminding of the fact that that things (referring to the e-retailers in general) are there, like, (hesitation) – with notifications and alerts and stuff. So, then it will interest you (grab your attention) and then you'll go and see. Like, I think a lot of people, um, just forget that it exists, you know? (Lisa-Jean agrees "ya"), sometimes. it's not their (interrupts herself) If you need something you think 'Okay, I must go to the shop' or - your initial thought isn't 'oh, lemme just check online which one of the four (e)-retailers that you (referring to the interviewer / researcher) are talking about... perhaps they (Superbalist, Spree, Zando, RunwaySale) have it, you'll obviously (Lisa-Jean agrees 'ya') or you might even get a better price for it, so... um. Ya, I think more 'in-your-face' type of advertising.

L: Okay, and, if you'd say – have you ever returned an item you weren't fond of, or didn't like, to one of these e-retailers you've purchased from?

H: Uh, no. I've never done that, but I've also been very weary of what I buy (Lisa-Jean "Okay"). So, I wouldn't buy something that I might return. Just because, I personally, don't feel like going about the admin – I think a lot of people feels the way, to rather go to the store, try it on – you know, it's part of the whole experience "going for an outing" and buying it then. Then you know it's definite (fit implied). But for instance, my roommate, my house mate, she does a lot of online shopping. And she will order shoes and stuff, and then if it doesn't fit, she'll do the whole, like, go through the admin process and then... But I just don't feel keen on doing that, because it's just, it is a hassle.

L: (Lisa-Jean just summarises the above-mentioned statement of Helene) Okay, but... so you just buy particular stuff, clothes or fashion items, that you find that will fit you, um, perfectly (Helene agrees "Ya"), and that you know you'll, (Helene agrees "Definitely wear") keep. (Helene "ya"). Okay. Okay, so that is just basically all I need. Is there any questions, or would you want me to specify something about the research, or are you query-free?

H: (laughs) um, no, I think, I think I'm good. Ya.

L: Thank you so much for your time!!

H: Ahh, it is a pleasure!

End of conversation

Conversation 2: M. Cheminais

(form Stellenbosch)

L: Okay, so just for the record, we are recording this conversation – do you agree to this recording of this session?

M: Yes

L: It's Mare Cheminais, can you just please state your age and where you currently live.

M: um, I am 22, and I live in Stellenbosch.

L: Okay so have you ever, or um do you want to, shop online, or are you, do you consider yourself an online-shopper?

M: Ahh, ya. Definitely more so than I do offline (Offline refers to going to physical stores).

L: So you say you um, prefer online shopping to um, going to a mall?

M: Ya, definitely.

L: Why would you say so? Or why would you prefer that?

M: Because it is way more convenient and it takes a lot of time to go to the mall. Um, time that I don't have. And can I just say that I don't like it. (Lisa-Jean – ya sure). I don't like malls, it's horrible.

L: Would you say that you are an early adopter to, to, um, online shopping? Were you one of the first ones in your friend circle, or um (Mare: Ya) your surroundings to begin online shopping?

M: I would definitely say, I would say in my surrounding environment, I was definitely one of the first, probably just because out of laziness.

L: (giggles) And would you say that you have, um, inspired others to shop online?

M: Ya. Definitely.

L: Um, and then also, just, would you say, of the four, four e-retailers that is in question, or what the thesis is about- Superbalist, Spree, RunwaySale and um, Zando – have you shopped at all of the outlets, or only a select few?

M: I shop predominantly at Superbalist, I've maybe shopped at Spree once, and the other two (RunwaySale and Zando) – never.

L: Is there a reason for, um, your, um fondness of Superbalist?

M: I, um, I don't like, I've never been, I actually didn't know RunwaySale or whatever, was a thing – I've never heard of it, um and Spree and Zando – I just don't like the clothes there. I guess it's just a bit like, Edgars. Like where you can walk in the shops for two hours and find one or two really nice things, but you have to sift (Afrikaans word for eliminate) through so much that you don't like that it is not worth the hassle to me. Whereas Superbalist, it has all the things that I like, which is nice for me.

L: And would you say that you are a loyal Superbalist user?

M: Um, I am ashamed (used loosely) by the level of loyalty I have to Superbalist.

L: So if I, say, your loyalty: has it been increased by the positive brand image – and by brand image, I mean like things like, their prices, or their good customer service, or is there anything in particular that Superbalist excels in?

M: um, I think just the whole convenience of it, like that (pause): initially I would “mmm and ah” about whether I should buy something and I'd think about it, but now, because I have done it so many times, and I know how easy it is to return and they literally just come pick it up – they EFT you the money back, it is so quick and easy. I kind of buy something, try it on at home and then if I don't like it, I just return it. I'd definitely say I'm, that's one of the things that contribute to how I (ends point)

L: So you would say, or would you say in your opinion, that um Superbalist caters for more of the millennial or 20-30 year um, old group of people?

M: Yes definitely, I think young people are definitely their target market. And I think that is actually maybe one of the other reasons why I don't like... for example – I know my mom likes ZANDO. And my mom and I don't like the same thing, I mean, we're 20 years apart.

So, I just think it's maybe.. I would definitely say- you can see the fact that every single model on Superbalist's website is young, that... hip and trendy and blah blah blah blah.

L: And would you say, in your opinion, um, do you think there is a correlation or there's a parallel between brand image and, um, brand, um customer loyalty?

M: Ya, I think so, I definitely think they are definitely correlated, People feel "cool" to say "Oh, ya, I shop at Superbalist"; they have nice stuff, so ya, so I definitely would think... and, I mean the fact that if you, their TV adverts – it's always got cool music, and it is always young, cool people, that are doing it – that just look so cool. So I think that, because their brand image is so hip and cool and trendy, that is kind of how people feel by purchasing from them.

L: (Repeating and summarising) So you, um, basically, correct me if I'm wrong, if you are saying that, um being hip and trendy, creates a positive brand image and thus creates a loyal customer base?

M: ya, I would, I would definitely say that.

L: And do you predominantly shop online – do you shop on an app, or on, on the website?

M: on the app.

L: (Repeating) On the app! And do you think it is (Mare interrupts "user friendly") user-friendly (agreeing with Mare), the app of Superbalist or you've used Spree before (assuming that Mare has used the Spree app)- so do you think that the app is also user-friendly? Or is there a difference, because you haven't shopped on Zando and um, RunwaySale out of the equation – because you haven't shopped there. Um, do you think Spree and Superbalist's apps are unique or do they offer more or less the same thing?

M: Ya, actually now that you've mentioned it. They (Spree and Superbalist) offer more or less the same thing. I think, um, I remember one thing, um also, I am under correction when I say this, because I've shopped at Superbalist, ag at Spree, as I said, maybe once or twice- and it was long ago (Lisa-Jean "ya"). So their (Spree) app could be a lot better now. But I remember that you can't really set that many filters, and I know one of the

things on Superbalist is the fact that you can set your price range, and blah blah blah, and I know that wasn't a thing at the time with Spree. So little things like that. It's something that you wouldn't necessarily miss when you didn't know that a competing app had it, but knowing that a different app has it, you feel like you miss it.

L: Okay, so you would classify that as "non-product related attributes" that improve the brand image?

M: (unsure) Ya.

L: um, And is there something that you think that e-commerce is, um, missing, in the sense that it can improve on something, or it's not um, delivering what it can potentially be in, in the future?

M: I actually thought about this the other day, because in your questionnaire that was one of your questions (referring to the SurveyMonkey survey – Addendum C), and then I couldn't think anything so I just didn't answer the question. But I was thinking about it afterwards, and I thought like it would be a cool thing for them (e-retailers), because I know Superbalist has this really nice thing that they call "Fit-finder", where you can kind of give in your measurements and it tells you what size you should be in terms of UK sizes, and US sizes, and small / medium / large and blah blah blah. But I thought it also might be cool to – often you see something on a model that you don't know if it would look nice on you, and I thought it would be cool if you can like, upload an image of yourself and kind of drag the clothes onto (your image), but that is going way (stresses the word) like, technological, obviously. But other than that, I honestly can't think of anything else. I can't see how online shopping could get any more convenient at the moment.

L: And... um, and then – another question, is just basically, um, how do you think that brand image, or a positive brand image, can help customers overcome barriers to shopping online?

M: (hmm mmm) (miming to further explain)

L: So, basically, how they can improve their customer loyalty by improving their brand image. How do you think that is something that they can work on? Do you think it's through

things like, through a more efficient return policy, or how do you think brand image can improve?

M: I think the thing that people don't... I think the thing that a lot of people don't realise in, and I think why a lot of people don't shop online, is because they don't trust it. They don't know how easy it is, and they don't know how convenient it is, and they don't know how safe it is. So I think that's why maybe many people don't shop online more, and I know that was one of my reservations before I was doing it (shopping online). Um, so I think that – I mean it would be a bit of a weird (interrupts herself) no, actually, I don't think it would be to advertise the easiness of it (implying shopping online in general). (Lisa-Jean agrees "ya") Like the convenience of it, I think would really attract customers.

L: And then just lastly, um, what do you think is, um, what do you think is missing from RunwaySale in comparison to Superbalist, or what, in other words, why wouldn't you shop um, at Runway(sale), instead of Superbalist?

M: As I said, I didn't know of Runway, I think I shop at, by now, I only shop at Superbalist just because of customer loyalty. I just – when I'm bored, I will scroll – the other way people will scroll through social media, because I don't really do social media anymore – I will scroll through Pinterest or Superbalist, or something like that and, so to me, it is just a habit of mine, because I like the app, whereas, so I think I'm not the best example just because – my liking for Superbalist might be influenced by customer loyalty. But – I think that as well, I'm assuming RunwaySale hasn't been on the market as long, or maybe aren't as famous or whatever- um, that just boils down to marketing. I can't really say much about, because I've honestly, I don't even know how their logo looks.

L: So RunwaySale doesn't have an app, do you think that influences your purchasing decision?

M: Ya, definitely. Well, okay look – to be honest, if say for example Superbalist didn't have an app, and Spree did. I would still rather shop online (their website) on Superbalist. If they (Superbalist and Spree) were offering the same stuff, I would [purchase] from the one that has the app, but if they offer different things – it is not so inconvenient to be on a web-browser, I mean "hello". (Lisa-Jean "ya") So I think I wouldn't necessarily, I would say if they are offering similar products, at similar prices, then they definitely are at a

disadvantage – I mean you would even get people that would pay an extra 10% for the convenience of the app – I’m not one of them – but there are people that would. But I think that, ya, if they... otherwise they sell completely different stuff [sees that she is talking for 12:25 minutes already] – am I, oh sure, okay no, ya, nevermind. It’s fine.

L: Okay, thank you for time and respondent (stumbles over words) [Mare laughs], participation in my thesis, um, I really (Mare: “thank you for having me”) really appreciate it.

Conversation 3: A. Tshakweni

(from Kayamandi, Stellenbosch)

L: Okay so this is the 7th of October 2017, and I'm here with Abroan, or Bronnie, and just to be clear, I am recording this, are you accepting of this, or are you willing to be recorded?

A: Yes, I am [accepting it]

L: um, so do you know of all four retailers, or e-retailers I am doing my thesis on? So it is Superbalist, Spree, Zando, and RunwaySale. Have you shopped, have you shopped at any, or all of them before?

A: I shopped at Zando before, but not at Spree yet. Not at Superbalist – I did at Superbalist (correcting herself). Yes.

L: (repeating) so Superbalist and Zando – and is there any reason for your purchases at Zando and Superbalist?

A: Um, for me, they [Zando and Superbalist] actually have like different stuff than you get at the store. And I don't really sometimes get a time to go to the store, which is why I prefer buying the stuff [clothing] online, because I get stuff of different fashion, different style, online, rather than going to the stores.

L: And if you think about price – is the price better for you online, than it is in store?

A: the price is better (unsure) better online, even though you are actually going to pay a shipping fee as well. But Zando and Superbalist, you don't pay your shipping like if you buy a certain amount – and that is actually what I like, because just going to browse through on my phone or on my computer then I can just get my stuff, rather than going to the store (Lisa-Jean “ya”) and go through every aisle and buy the clothes, which is, I am much more comfortable online than in the stores.

L: And you said something about going online – do you do it on your phone more, or on, um, um, the website?

A: I do it on my phone more.

L: Really? And do you shop at home? Or do you shop at work more?

(Abroan starts giggling, unsure about whether she can state her honest answer)

L: You can say! You can really be honest! This is a [implied safe space]

A: I shop at work more!

L: Is that because of um, just internet issues at home, or is it just (Abroan “yes”) more convenient here [conversation was held at her work place].

A: It’s internet at home, so, that is why I actually shop here at work – because of the internet.

L: No, it’s interesting that you say that because a lot of people have said that before, so that it only why I ask. And is there something specific about Zando that you prefer, say, to um, an e-retailer like Superbalist? You said that you shop the most at Zando [Abroan nods in agreement], is there, is it just because they have – what makes them unique in your eyes?

A: In my eyes the prices are quite good than Superbalist. And the fashion. They’re actually going through the fashion. Ah, for me that Superbalist- they’ve got everything but there is some stuff that they don’t have, that I actually get from Zando. [Lisa-Jean “okay”] So, and, and, and Superbalist I think you pay for your shipping. but Zando, if you buy a certain amount you don’t pay for your shipping fee. And for me, I actually prefer Zando. That is why for me – it’s actually quite unique.

L: What type of clothes do you shop online, if you shop online?

A: It is normally shoes, and dresses, and jumpsuits

L: So it’s more, so it’s more, in your opinion, more fashion for work? Or for fashion for, um, outside of work? For recreational activities?

A: It is fashion for outside of work.

L: [repeating] Outside of work. And um, would you say that you are loyal to um, to Zando?

A: oh, when it comes to shopping, I am not very loyal [Lisa-Jean laughs] I don't actually have a specific place that I shop to, but Zando ya.

L: Do you shop at any other e-retailer other than the four um, mentioned in this study?

A: [shakes her head in disagreement]

L: um, so not at any, um, other e-retailer? It can be a retailer that has physical stores and also just an online um, shopping ...

A: Ya, I do like at MrPrice, mostly, if I'm not at Zando – then I go to MrPrice and check some of the stuff from them and so they are more [unclear word] in price, they've got nice clothes as well, so. If I'm not shopping at Zando, then I am shopping at MrPrice.

L: And how old are you turning this year, or how old are you at this current. . .

A: I am 25 [years old]

L: [repeating] 25 years old. And, um, ya, is there something – anything – in your opinion that they can improve on, in their, um brand image? Like – do you think they should um, better themselves in general? Any e-retailer in your...

A: For me, actually, everything, I am satisfied, so. I don't see anything that they can better, because with the savings, with the clothing, with the prices, I am still good. It is just the other retailers can actually don't let you pay for, for, for the shipping fee when you are ordering stuff online as well.

L: And, um, so you'd say you are not loyal – you switch?

A: I switch

L: Ya you switch. Okay, so that is basically all from my side. Is there any questions you have or queries or anything that you ...

A: No. No!

L: Thank you so much for your time, I appreciate it so much.

Conversation 4: M. Pretorius

(lives in Durbanville, works in Stellenbosch)

L: okay, this is a conversation with Marelize, and um, just to be clear we are recording this session – so you have to give your permission. So do you give your permission?

M: Yes, I do.

L: So this is all about online shopping. So do you shop online?

M: I do.

L: Or have you ever shopped online

M: Yes.

L: And for how long um, have you shopped online for? More or less.

M: uhhh [thinking], on and off 8 years [Lisa-Jean repeating '8 years'] but more in the last 2 years.

L: And you are, 30 years old?

M: Yes.

L: And, um, of the four e-retailers, have you shopped um, uh, at Superbalist, Zando, RunwaySale, and Spree, have you shopped by one of them or all of them or none of them?

M: Shopped on Zando, um, I've not shopped on Spree or Superbalist yet. Which was the other one you called?

L: RunwaySale

M: Oh [surprised] RunwaySale! [Remembering] No, I haven't yet.

L: So only on, um, Zando?

M: Ja.

L: Is there a specific reason that you would say that you, um, shop only at Zando?

M: Umm, I think it is from a user, user-friendly point of view, and also pricing. I don't like, I don't like the layout, the layout of Spree and Superbalist's websites, purely. [LisaJean begins the next question] And their screenshots [referring to the images of the model wearing the clothes that is put on the app and website to showcase it].

L: Is there any, any – what specifically don't you like?

M: I, I, I just find Zando more user-friendly. And if I have to mention MrPrice [referring to the online store] websites, [LisaJean "ja"] is the most user-friendly.

L: Yes (in agreement). And would you say that you are very loyal to Zando?

M: Yes.

L: Do you shop in physical stores as well, or only online?

M: I prefer online [giggles]

L: Is that, is that – what is your reasoning behind shopping online?

M: Umm, just that there is more availability. And umm.

L: Availability in the sense of time or um actual products?

M: Ja, products... and you just don't feel like going to the mall. It's so much easier.

L: Ja, so it's convenience?

M: Convenience, and being lazy, I suppose.

[both laugh]

L: But you have a 9-5 or 8:30 to 5 job, is that also influencing your, your – how you shop and how you think about shopping?

M: uhmm, Ag I suppose I would do most of it, ja- in the evenings... um, so yes. It is more is more convenient, because I can't go shopping between 8:30-5. Basically.

L: And would you say that you are, are, between, um, between, a few e-retailers? Even though it is not mentioned before?

M: Ja. I'm on a few [subscribed to a few online sites]. There are a few that you haven't mentioned, ja.

L: And, um, could you state those, those e-retailers.

M: Ja. Um, MrPrice. [LisaJean "ja"] I mentioned, um, I, I would say I'm the most loyal on that because of the user-friendliness of the website, and also the pricing. And um, TakeAlot.

L: Do you shop TakeAlot clothing [meant as clothing available on the TakeAlot website-not branded clothing under the TakeAlot name].

M: No, not clothing.

L: Okay [Marelize "ja"], and um, are you, are you, um, do you think there is anything in e-retailing, of those specific four, that could, um, improve, um – you mentioned the layout, or easy-to-use, user-friendliness of the app, [Marelize nods in agreement]. Is there something else that you would improve on?

M: uhh, no not really.

L: And, would you say...

M: Nothing really that I can think of.

L: And if you just look at brand image – brand image in the sense that the general perception of being the best, or in your opinion, um, of attributes and non-product attributes: like customer service, and app, and things like that, um, (Marelize nods in agreement), which one do you think is the best – out of the four?

M: uhmm, so if you look at, if you look at Spree and Superbalist, it is a little bit more upmarket.

L: Ja

M: um, and it is, it is websites that I'd like to shop on, but it is all because of price.

L: You wouldn't necessarily

M: It is just a bit more expensive.

L: Than Zando?

M: uh, ja.

L: Have you shopped, or [rather] browsed on Superbalist or Zando – [meant Spree] (Marelize "ja") and are you familiar with RunwaySale?

M: Yes, I am actually um, registered [at RunwaySale], I am getting emails. But I haven't gotten as far as going onto the website to shop, yet.

L: And would you say that um, having ... RunwaySale has only, only has a website, not and app. Do you think that is a problem, or, doesn't it really matter for you?

M: it doesn't really matter for me, because I, I, I, don't necessarily like shopping on the app, so I prefer the websites.

L: Because of the? The... What reason?

M: The screenshots are bigger and I can see it, you know, it is just a little bit more visible.

L: Have you ever had a, a problem or an issue with any of your online orders, and how did the e-retailer respond to that – IF there was a problem?

M: I actually, my first purchase with Zando, I bought a pair of shoes, and after a week, um, something broke on the shoe. And it was very easy to just return – they just came and collected it, and re/replaced it. (LisaJean "ja") So it was very, very convenient. And I didn't have any problems with, with them [Zando]. At all.

L: so it was just a very good customer experience, customer-service experience, in your opinion.

M: Ja.

L: And ja, so it's just basically you shop predominantly on Zando, because of, prices. Is that a fair statement to make?

M: Yes.

L: Okay, that is basically all. Thank you so much for your participation and time.

M: Thank you!

L: Is there any questions or queries?

M: Nope.

L: Okay.

ATTACHED: SIGNED LETTER OF AGREEMENT

LETTER OF AGREEMENT

Dear Respondent

I am an honours student from Vega School of Brand Leadership in Cape Town. For my thesis, I am conducting a study to explore the role that brand image has on building a loyal customer base in the South African fashion e-retailing industry.

By signing this letter of agreement, you are agreeing to take part in the study and are aware of the following:

- This study will only be used for research purposes only, not marketing or sales attempts.
- Your response will stay anonymous and confidential
- The duration of this conversation will be no longer than 10minutes
- If you are uncomfortable with any questions asked, please do not to answer
- There is no right or wrong answer. Please answer as truthfully or appropriately as possible.
- You may stop at any time.

Thank you for your participation and time.

Email/ cell number:

theheleneschaefer@gmail.com

Signature: H. Schaefer Date: 2017/10/06

Helene Schaefer

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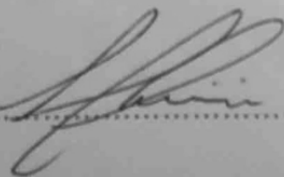
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Thank you for your participation and time.

Email/ cell number:

.....mdre chemindis@gmail.com.....

Signature:



Date: 2017-10-06

LETTER OF AGREEMENT

Dear Respondent

I am an honours student from Vega School of Brand Leadership in Cape Town. For my thesis, I am conducting a study to explore the role that brand image has on building a loyal customer base in the South African fashion e-retailing industry.

By signing this letter of agreement, you are agreeing to take part in the study and are aware of the following:

- This study will only be used for research purposes only, not marketing or sales attempts.
- Your response will stay anonymous and confidential
- The duration of this conversation will be no longer than 10minutes
- If you are uncomfortable with any questions asked, please do not to answer
- There is no right or wrong answer. Please answer as truthfully or appropriately as possible.
- You may stop at any time.

Thank you for your participation and time.

Email/ cell number:

~prato@gmail.com

Signature: [Signature] Date: 7/10/17

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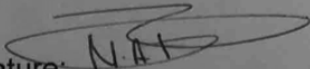
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Email/ cell number:

Tshakweri11@gmail.com

Signature:  N. A. S. ABROON Date: 7/10/2017

ATTACHED: SAFE ASSIGN REPORT

ATTACHED: ANALYSED TRANSCRIPTIONS