



**CRITICAL SUCCESS FACTORS FOR E-TAILING: CASE STUDIES OF CLOTHING
RETAILERS IN CAPE TOWN**

by

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ABSTRACT

The South African retail apparel industry is undergoing transformation in that e-tailing is proving to be a lucrative way of trading. Although apparel e-tailing has not taken off to the same degree as in developed markets, e-tailing continues to be a growing market with great potential for new entrants to thrive. Yet so far, a small number of apparel e-tailers have dominated the market. In order to make useful sense of their progress and achievement, it is necessary to explore the critical factors contributing to their success. Identifying such factors would seem to be imperative for the survival of e-tailers trading in a turbulent economy such as South Africa's. The objective of this study was, therefore, to identify a gap in literature by determining and examining the critical success factors of leading pure-play online apparel e-tailers and omnichannel or hybrid retailers based in Cape Town. The study intends to use four case studies to allow the researcher to acquire an in-depth perspective on each selected company's business environment. The study employs a Systems Theory to investigate the nature and key interactions of the organisations. The literature points to a relationship between these business elements and critical success factors. The research adopts an interpretive approach to generate qualitative data. The data emanates from semi-structured interviews with three individuals connected to each of four organisations. The CSFs found in the study can help apprise potential market entrants of the factors requisite for an e-tailing business to prosper. The findings of the study revealed the most fundamental CSFs contributing to e-tailer success. Overall, the study established and contributes the main challenges experienced by apparel e-tailers, strategies to combat the challenges and finally, an effective growth and development framework to guide existing and potential apparel e-tailers.

Keywords: E-tailing, E-tailers, Critical Success Factors, Omnichannel, Hybrid Retailers

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CHAPTER 1: INTRODUCTION

1.1 Introduction

This study focuses on identifying the critical success factors (CSFs) for apparel e-tailers trading in the South African market. The aim of the study is to develop an effective growth framework for existing and potential e-tailers. The South African apparel industry is a prosperous, billion-rand industry in a process of transition: the rise of digital technology and utilisation of the internet is transforming how almost all retailers trade (Gatignon et al., 2017:85, citing McKinsey and Company, 2017). The shift has prompted organisations to reevaluate their business models, as technology has enabled retail channels to become interconnected, so that customers expect transparency across pricing, service and the overall shopping experience (Sterneckert et al., 2019:5).

While the industry is already undergoing transformation, South Africa's emerging economy has great potential for e-tailer growth (Alexander & Mason, 2017:2). Driven by innovation, technology and software infrastructure, e-tailers have disrupted traditional retail practices to the extent that even traditional retailers have expanded into online retail (Doherty & Ellis-Chadwick, 2010:6). Nevertheless, as Varela et al. (2017:3) note, there remains ample room for online retail growth and market share for newcomers.

There are only 15 leading apparel e-tailers in the South African market (Goga et al., 2019:15) and ecommercedb (2021). The e-tailers recognised in this study started out as small businesses, some even start-ups (Smith, 2018), and all are now e-tailing leaders in the retail industry. Fundamentally speaking, competing successfully via an e-commerce platform involves understanding how to acquire a competitive edge (Goga et al., 2019:1). This study therefore seeks to derive a set of distinct CSFs for organisations that are responsible for their growth and development.

While many authors have produced studies identifying CSFs for all types of organisations as well as e-tailers (Viehland, 2000:912), (Varela, Araujo and Manupati, 2017:4) (Aydin and Ayhan, 2018) and, there are no studies that specifically explore the CSFs essential for apparel e-tailers in South Africa. These studies set out to distinguish competitive advantage by determining CSFs for e-commerce. Aydin and Ayhan (2018:28) investigated the most relevant e-commerce tools, payment methods and CSFs to aid e-commerce businesses while Varela et al., (2017:2) delved into the whole e-commerce process with a special focus on CSFs. Ultimately, the

findings presented an integrated e-commerce success factor framework highlighting the 12 most significant CSFs. Viehland (2000:1) explored the opportunities and significant factors to consider for developing an e-business strategy. Identifying the reasons for businesses' success in this sector will help to create a sustainable apparel e-tailing model for other businesses to follow. Like other e-tailers, apparel e-tailers are influenced by strategic tools such as e-strategies and e-business models, which once aligned, will help attain competitive advantage (Öven & Hicintuka, 2020:9). Since the aim of this study is to generate new knowledge, the study proposes an effective growth and development framework developed from key findings generated by industry experts. The framework is structured to guide existing and potential apparel e-tailers and may be used as a measurement tool to build, prioritise and diversify products and processes.

Durmaz and Ilhan (2015:210) indicate that in a technology-driven era, growth is a natural business process and has become a necessity for all businesses. Growth can be defined quantitatively and qualitatively, quantitative growth being a rise in sales revenue, product range and business output, and qualitative growth a function of expanding the standard and quality of business components.

The requirement for an effective growth and development framework stems from the need for e-tailers to innovate and adapt to continuous market changes in order to achieve longevity. Furthermore, the framework enables e-tailers to meet existing industry demands by adding value and incorporating the key business elements required for success (Hacklin et al., 2018:83).

1.2 Background to the study

Numerous studies discuss steps taken to integrate e-commerce as well as key trends in the industry (e.g., Tamilarasi & Elamathi, 2017; Brady, 2018), but there is limited research focusing on apparel e-tailers and the factors contributing to organisational success in South Africa (Budree, 2017; Goga et al., 2019). A broad study by Goga et al. (2019) established strategies for adopting online retail in South Africa, examining leading retailers trading in electronics, groceries and clothing. Previously, Choi et al. (2014) had investigated the success factors for a renowned fashion house in relation to e-commerce and digital innovation. It is therefore fair to say that limited research relevant to the CSFs of apparel e-tailers in South Africa has been found. The motivation for this study is specifically to identify and understand the unique CSFs

that have resulted in the success of leading apparel e-tailers in Cape Town. The study will identify the CSFs for apparel omnichannel/hybrid retailers and apparel pure-play online retailers.

Trading Economics (2019) notes that South Africa's retail sales in September 2019 for textiles, clothing, footwear and leather goods grew faster year-on-year than all the other retail groups. Statista (2019) estimates that South Africa's apparel segment will grow by 16.1% in market volume (which translates into over R100 million) by 2023. In the second quarter of 2019, South Africa's Gross Domestic Product (GDP) growth was recorded at 3.1% while the clothing and footwear category grew by 5%; thus the South African Reserve Bank (2019:9) supports Statista's perception (2019) that the clothing, footwear and leather goods sector grew at a faster pace than the average, generating a 0.6% growth year-on-year between 2017 and 2018. Moreover, this sector employs 21% of the labour force (Business tech, 2019). The major players in the industry include the four retailers on which this study focuses. In order to ensure their anonymity, the retailers will be referred to as Company 1, 2, 3 and 4.

Although Covid-19 has further weakened the South African economy, Bhorat et al. (2020:11) indicate that online retail will continue to experience growth, while Teuteberg (2020:3) claims that the pandemic has increased consumers' technological dependence, citing evidence that Amazon doubled their overall sales in this period. In recent times, the Covid-19 pandemic has led to 37% of South Africans choosing to shop online (365 Digital, 2020).

The major area of concern leading to the conceptualisation of this study is the limited number of successful apparel online retailers in South Africa. De Villiers (2019) posits that since a 2018 merger, Company 1 is "the largest player in online fashion in South Africa". Naspers (2019:44) confirms that the apparel e-tailer's sales grew by 80% and revenue by 90% year-on-year in 2018–2019, suggesting that Company 1 is fast becoming SA's largest and most successful fashion e-tailer. The online retailer is home to more than 400 brands, privately owning 6 of them (Superbalist, 2019). Company 2, on the other hand, was only founded in 2012 (Zando, 2019), but has attracted a great deal of investment over the years in spite of various challenges faced (Goga et al., 2019). Company 2 offers over 550 brands and claims to be South Africa's biggest online fashion retailer (Zando, 2019). Companies 1 and 2 are direct competitors as both retailers are pure-players, operating solely on the internet.

Company 3 is one of South Africa's leading omnichannel/hybrid apparel retailers founded in 1931. Company 3 trades in 14 different countries, in more than 1500 stores and employs over

46 000 employees (Woolworths Holdings Limited, 2019). Company 4 is also one of the country's most successful independent chain stores, offering an array of products including apparel. Company 4 was established in 1924 and today trades within countries in Africa, Australia, New Zealand and the United Kingdom. This retailer drives the concept of local manufacturing, promoting and growing local production (TFG Limited, 2019). Companies 3 and 4 are retailers that have transitioned from the physical store and integrated digital and physical infrastructures (Jocevski et al., 2019:79).

Broadly speaking, South African online businesses experience many obstacles, both social and economic. The National Advisory Council of Innovation (2018) reveals that inequality is a widespread concern, with the resultant lack of universal internet access being a barrier to e-commerce trading in a developing economy (Ajmal et al., 2017:161). It is therefore imperative to establish critical success factors, especially for start-up businesses, in order to ensure long-term sustainability (Reynold et al., 2019:2). Parmenter (2016:22) defines CSFs as a "list of issues or aspects of organisational performance that determine ongoing health, vitality, and well-being". According to Martinez et al. (2016:4), CSFs are indeed any aspect or task undertaken that results in the overall success of an organisation, so that identifying them can in due course have a significant impact on an organisation's growth.

1.3 Statement of the problem

Considering the above mentioned, the statistics currently indicate slow movement towards online retail yet impressive future growth for South African e-tailers, with Statista (2021) predicting growth of over R65 million for the segment in 2021. The problem is that although there has been some research on CSFs and e-commerce (Alyoubi, 2015; Varela et al., 2017; Tsironis et al., 2017; Goga et al., 2017), hardly any attention has been paid specifically to apparel e-tailers trading in South Africa. To gain greater insight into the identification of the CSFs, the study was fundamental in enabling the researcher to be the original source and to have inquired into the e-tailers' backgrounds, business processes and grasping their overall capabilities was crucial in developing CSFs for South African e-tailers. Careful consideration of the field induced the researcher to carry out an in-depth analysis of how current leading e-tailers are able to achieve sustainable strategic success, by identifying a set of CSFs which may potentially help future e-tailers considering entering the market. The study was underpinned by a qualitative research approach which is a form of social inquiry and is viewed as the foundation of the interpretative view, gathering in-depth insights into the problem of the e-tailing market and

understanding of the South African e-tailing CSFs. Socially, identifying the CSFs can help businesses to connect with surrounding organisations in an inexpensive and efficient way. The study provides significant factors that e-tailers should focus on in order to grow and expand, reaching new customers in various parts in South Africa and creating a social impact on society.

1.4 Research purpose

The purpose of this study was to establish the relevant factors that result in the success of apparel e-tailers trading in the South Africa market. The research aims to determine the root causes of success for apparel pure-play online retailers as well as hybrid retail companies. The researcher aims to determine whether CSFs are capable of laying a foundation for potential apparel e-tailers wanting to enter the market. This study therefore employs a qualitative research method with focus on multiple case-studies while using an interpretative philosophical view. This type of research methodology will enable the researcher to focus on several organisations and create “new, richer understandings” through a qualitative research method and providing a growth and development framework relevant to South African apparel e-tailers (Saunders, Lewis and Thornhill, 2019:149).

The study also set out to identify the challenges that apparel e-tailers are currently encountering, and devise appropriate strategies to meet these challenges.

1.5. Research questions

- 1) What are the CSFs for leading apparel e-tailers in South Africa?
- 2) What are the challenges existing e-tailers are facing?
- 3) What types of key strategies can e-tailers implement to combat challenges?
- 4) What framework can be developed to ensure the effective growth and development of e-tailers in Cape Town?

1.6. Research objectives

- 1) To establish the CSFs of leading apparel e-tailers in South Africa
- 2) To ascertain the challenges that existing e-tailers are facing
- 3) To identify holistic strategies that e-tailers can implement to combat these challenges
- 4) To develop an effective growth and development framework for apparel e-tailers in Cape Town?

1.7. Significance of the study

The main goal of this study is to broaden our understanding of the critical factors necessary for apparel e-tailers trading in the South African market. The study seeks to determine whether similar CSFs are capable of guaranteeing success for apparel e-tailers entering the market. The study further aims to contribute towards the body of knowledge of e-tailing and positively impact the retail industry by enhancing growth and success. The study thus intends to increase understanding of the subject while solving the research problem at hand.

By exploring the challenges and problems that e-tailers experience within the industry, potential solutions can be devised that may anticipate what e-tailers can expect to encounter during times of trade. The strategies and solutions found whilst conducting the study can be reviewed and implemented in industry. Individuals in the retail industry and the academy also stand to benefit from exposure to the most recent literature to be found on e-tailing. Concomitantly, the study will propose a detailed apparel e-tailing framework suitable for existing and potential e-tailers, a growth and development framework intended as a holistic guideline for all South African apparel e-tailers.

The study will also broaden the Cape Peninsula University of Technology's research portfolio and expand the body of knowledge of e-tailing by establishing the factors that are critical for the success of players operating in the industry and those intending to enter it.

Lastly, this study is conducted in partial fulfilment of the requirements for the award of the Master of Retail Business Management Degree, which will benefit the researcher's practical and theoretical knowledge.

1.8. Structure of the Dissertation

The dissertation will consist of six chapters, as depicted in Figure 1.1, below.



Figure: 1.1: Structure of the research study (Author's own compilation)

1.9. Chapter summary

This chapter began with an introduction that furnished a context for South African apparel e-tailing. The introduction underscored the importance of digital technology, innovation and that there are currently 15 renowned e-tailers trading. The introduction highlighted three existing studies surrounding e-tailer CSFs yet none of the studies related to CSFs for South African e-tailers. The background revealed that South Africa's apparel segment will grow by 16.1% in market volume (which translates into over R100 million) by 2023 and that the Covid-19 pandemic has increased consumers technological dependence.

The research problem highlighted that South African e-tailers require a set of CSFs which the study intended to identify and analyse the CSFs of leading apparel e-tailers trading in South Africa. The study aims to lay a foundation for potential apparel e-tailers wanting to enter the market. Additionally, the significance of the study was to contribute to the e-tailing body of knowledge as well as to the industry by identifying industry challenges and develop strategies to overcome the challenges. The next chapter discusses CSFs and the business environment in which South African e-tailers trade.

CHAPTER 2: OVERVIEW OF SOUTH AFRICAN APPAREL E-TAILING

The previous chapter discussed the topic and its background, the research problem and the objectives of the study. This chapter provides a thorough analysis of literature regarding apparel e-tailing in South Africa, as well as more contextual information about the research problem.

Izogo and Jayawardhena (2018:2) posit that e-tailing has added another dimension to retailing, offering more diverse ways to shop over and above the traditional channels. The most common types of e-commerce are pure-play retailing and omnichannel retailing (Goga et al., 2019:14). Syed and Khan (2017:34) claim that the world is experiencing a digital revolution because of electronic exchanges and transactions made online. The introduction of e-commerce has enabled e-tailing to become a common retail practice. While the benefits of e-tailing are undeniable, there are several other factors, negative as well as positive, to take into consideration when exploring this topic (Huseynov & Yildirim, 2015:1). Hossain, Shin and Sim (2019) investigated Current the CSFs of e-commerce adoption and Ajmal, Yasin and Norman (2017) identified the CSFs influencing e-commerce adoption for SMEs.

This chapter therefore provides an overview of e-commerce, e-commerce trends, the growth and development of e-tailing, challenges of e-commerce, the variety of retail channels, technology, logistics, social media, e-satisfaction, online shopping behaviour and, lastly, a summary of the discussion.

2.1 The development of the internet

The Internet of Things (IOT) is described as the connectivity of things, which is a system that has the ability to virtually represent and access an internet-like structure for remote sensing or operating components with real-time data. The internet has therefore altered the way we live, work and interact with each other and with organisations (Langley, Doorn, Ng, Stieglitz, Lazovik and Boonstra, 2019:853). Sardjono, Selviyanti, Hobri and Azizah (2021:1) state that the internet originally derived from the Advanced Research Project Agency Network (ARPANET) project which delivered it's first "node to node" communication between two computers. Throughout the years technology continued to advance and in 2005, the term internet was established. At present, the internet is used not only as means of communication, but to collect data, conduct research, develop new knowledge and to determine market segmentations.

2.2 History and overview of e-commerce

Baskaran and Keloth (2018:40) claim that the first online transaction took place in the United States in August of 1994. A compact disk was sold on an online website, thereby establishing the concept of e-commerce. E-commerce is thus the process of buying and selling goods and services over the internet (Al-smadi & Freihat, 2019:2). E-commerce allows individuals to make transactions anywhere and at any time. The internet is a commercial marketplace directed at individuals, whether consumers or other businesses (Al-smadi & Freihat, 2019:2).

Huseynov and Yildirim (2015:1343) note that business-to-consumer (B2C) is the most common type of e-commerce, examples of which include internet banking and online shopping. Smith and Anderson (2016:2) indicate that a study conducted by the Pew Research Center (2016) reveals that online shopping is the fastest growing internet activity, which explains why so many businesses have opted for an online presence. E-commerce is making a major contribution to economic growth and overall economic performance (Huseynov & Yildirim, 2015:1343).

Javid and Ghaeli (2019:269) classify e-commerce as “Internet Business”, which continues to change as a result of new software technologies. Growth and developments in e-commerce have increased imports and exports across the world, including developing countries. The United Nations Development Programme (UNDP) encourages developing countries to embrace e-commerce, citing among the benefits an increase in earnings, improvement in social development, decreases in business expenses and stronger incorporation into international markets (Alyoubi, 2015:480). Similarly, Nair (2017:330) maintains that e-commerce promotes opportunities for low-cost imports and higher prices for exports. E-commerce creates job opportunities in areas such as software, logistics and specialised manufacturing, advances small businesses and helps create a competitive environment (United Nations [UN], 2019:10). For instance, in China, approximately 10 million small businesses are able to sell products and services via the ‘Taobao’ platform. Half the entrepreneurs involved are female and 160 000 have disabilities, a situation that helps promote overall social equality (United Nations, 2019:10).

Specifically addressing the current state of e-commerce, the next section discusses trends in e-commerce.

2.3 Trends in e-commerce

Daugherty et al. (2019:20) explain that e-tailers such as Amazon and Alibaba are re-modelling the entire omnichannel experience; for example, JD.com has been obliged to focus on enhancing the in-store shopping experience by installing robotic carts and illuminating product displays.

According to the African Technology Show (2019:1), South Africa is among the seven developing countries that are the most advanced in terms of e-commerce, robotics, communications, and financial technology. Worku and Muchie (2019:349) point out that e-commerce is highly beneficial for micro and small/medium-sized businesses in South Africa as it increases efficiency and renders processes such as distribution, retail and marketing simpler and easier to manage. E-commerce also supports local municipalities in monitoring service quality and levels of compliance by service providers, as well as affording easy storage for data (Statista, 2021; Macro trends, 2021).

South Africans are more than ready to reap the benefits of e-commerce, with 38.13 million South Africans accessing the internet out of a population of over 60 million people (World Bank, 2017:50).

2.4 Growth and development of e-tailing

Cheng and Kelvin (2021:5) elucidate that the rise of digital technology will continue to experience exponential growth, fundamentally changing the traditional retail business model. Consumers all around the world have turned online shopping platforms, indicating the shift toward digitalising business processes and operations. Retailers need to be agile and willing to adapt to the changes in the business environment in order to remain sustainable (Cheng and Kelvin, 2021:16) therefore, they should consider incorporating this type of business model for their distribution channel. Domadenik, Koman and Redek (2018:12) reveal that “speed, agility and innovation” are imperatives to succeed as an e-tailer, exploiting innovative technologies and the development and implementation of innovative strategies increases competition. Technologies include analytics, artificial intelligence (AI) and augmented reality (AR) and cloud services.

Mulajkar and Prakash (2015:2) explain that e-tailing is the ability to bypass physical precincts to reach customers in a way that differs from traditional retailing. The foundation of an e-tailing

business model is technology, with logistic support that accelerates consumer procurement and the process of purchasing. According to Saxena et al. (2018:292), e-tailing can be defined as the sales of goods or services via the internet, an interface that is also referred to as web-shop, e-store, virtual store, internet shop and online store.

Thanks to digitisation, manufacturers have built direct relationships with consumers, forcing traditional retailers to adjust their practices (Reinartz et al., 2019:12). Among the advantages of e-tailing are how simple and convenient the process is, a reduction in operating costs, the ability of the e-tailer to grasp customer preferences through online interaction and, most significantly, the ability of individuals worldwide to access e-shops, thereby broadening and increasing companies' customer base (Rao & Hans, 2015:138).

Dimitrova (2019:105) notes that e-tailing allows for the division of production and distribution, which in turn permits individual functionality for costs, space and time. When pure-play e-tailers develop distribution systems, the economic contribution is assumed and differs from traditional retailers' distribution systems. With traditional retailing, the distribution costs are included in the overall selling price of the item, whereas not all e-tailers give the customer the option of personally collecting goods at designated pick-up points. E-tailing means that it is no longer necessary to store all items for sale at the point of sale, unlike the case of physical retailers, although pure-play online retailers may use "pop-up" shops to test trial brands, products and space (Dimitrova, 2019:105). E-tailers' core strategic focus areas should therefore be the fashion range/items sold, the logistics system, the key services offered, as well as personalised services, mobile commerce, the amount of time scheduled on TV or other media in terms of promotions, banking, rural advertising and geographic divisions (Rao & Mohan, 2017:782).

Alexander and Mason (2017:4) maintain that the most prominent trend in e-tailing in South Africa is that it will continue to grow throughout the country. In doing so, the industry will continue to follow the example of more advanced, first-world countries. There will have to be renewed attention to cyber security to safeguard data and financial information. Over and above that, big data will form an essential part of e-tailing intelligence (Alexander & Mason, 2017:19).

2.5 Challenges facing e-commerce

Table 1: Challenges in e-commerce (compiled by researcher)

Challenge	Explanation
Continuous customer returns (Mulajkar and Prakash, 2015:2)	Seewald (2019:2), citing Kristensen (2011), notes that creating a system that requires customers to provide body measurements such as height and weight can reduce returns. Reducing the number of defective items with major quality issues can also reduce returns.
Developing countries inability to achieve digital expectations (Aaronson, 2019:2)	South Africa is one of many developing countries that still need to develop digital capabilities and policies to see real growth in e-commerce (Aaronson, 2019:2).
Inability to adapt to environmental changes (Makgosa, Themba, lyanda and Phambuka-Nsimbi 2015:4)	When retailers move to e-commerce, the implementation of activities in the supply chain and the way stock is allocated are different from the type of operational activities required for traditional retail processes.

<p>Various touchpoints (Aiolfi and Sabbadin, 2017:87)</p>	<p>The rise in digital channels such as mobile phones and apps has influenced consumers and retailers to constantly be using different channels and touchpoints. The challenge for retailers is the capability to manage and accelerate customers' experience (Aiolfi & Sabbadin, 2017:87).</p>
<p>International competition (Makgosa, 2015:7)</p>	<p>South African retailers are also having to compete with international retailers that have expanded and now have physical and online presence nationwide, which has led to small retailers having to close down (Makgosa, 2015:7).</p>
<p>Success as an e-tailer is uncertain (Yang et al., 2016:176)</p>	<p>Large e-tailers experience high costs in setting up software programs, including the equipment needed (Yang et al., 2016:176).</p>

Mthembu, Kunene and Mbhele (2018:33) also reveal that the most prominent barriers of e-commerce in developing countries are infrastructural, socio-economic and cognitive barriers which consists of broadband connectivity, online payments, cybersecurity, managers understanding of key factors of the business, logistics and comprehending the English language.

The next section will discuss the development of retail channels.

2.6 What is a channel?

Lui et al. (2019:5) cite Neslin (2006:96) to explain that a channel is the point of contact with customers, a medium through which the retailer and the consumer can liaise and connect. The channels can be classified into four types: First, offline channels, which are also referred to as catalogues and physical stores; secondly, online channels such as retailer websites and email

addresses; thirdly, mobile channels which comprise of mobile websites and applications; and lastly, alternative touchpoints, such as word of mouth, promotions and social media. Multiple channels and touchpoints are advantageous in terms of the increase in customer satisfaction, the increase in purchase repetition and brand loyalty, and the likelihood of cost efficiencies (Larke and Kilgour, 2018:4).

Aiolfi and Sabbadin (2018:86) characterise a channel as feeding into a customer touchpoint where all channels (including mobile, catalogue, online, TV advertisement and store) are able to interact with each other. Rooderkerk and Kok (2019:8) explain that throughout the shopping process, consumers constantly revisit a retailer's physical store and online store. For example, a consumer goes online to check a retailer's prices but purchases the item from a competitor instead. Retailers can tackle this problem by broadening and diversifying channels in order to gain exposure.

2.6.1 Single channel retailing

As depicted in Fig. 2.1 below, single channel retailing applies to merchants who trade only through one channel, such as a store (Rooderkerk & Kok, 2019:5). Previously, shopping only occurred in physical stores and involved face-to-face interaction (Marmol & Fernandez, 2019:58).

2.6.2 Multichannel retailing

Beck and Rygl (2015:170) note the range of terms used for multichannel commerce, including "cross-channel", "everywhere commerce" and "no-line commerce". Multichannel retail involves a limited set of interactive channels, focusing on the store, online website, and direct advertising (Verhoef et al., 2015:3). Aiolfi and Sabbadin (2018:87) note that the term multichannel was first introduced in the early 2000s. It can be defined as the design, distribution, harmonisation and evaluation of channels through which retailers and consumers are able to interact with the aim of creating customer value through compelling customer acquisition, preservation, and development.

Kaur, Osoman, Bakar and Sabri. (2019:2) claim that multichannel retailing can be conceived of as a strategy to offer the consumer a seamless shopping experience. As the name suggests, the retailer is able to offer the customer numerous channels of access, including email, social media, call centres and websites. Weiland (2016:74) points out that the multichannel retail

strategy was intended to offer customers multiple sales channels, but the rise of internet connectivity on mobile devices grew the strategy to a point at which major flaws surfaced. The multichannel strategy resulted in the same stores competing in terms of price, discount and delivery options, a situation that engendered the omnichannel retail strategy, making the consumer the point of convergence.

2.7. Omnichannel Retailing

Payne, Peltier and Barger (2017:5) cite Juaneda-Ayensa, Mosquera, A. and Murillo (2016:2) to point out that *omnis* is a Latin word for “all”, so that omnichannel means “all channels together”. Omnichannel is also known as hybrid retailing and focuses on interactive channels and mass communication channels. These include the store, social media, mobile channels such as smartphones and tablets, customer touchpoints like TV and radio, all of which ultimately provides an integrated retail experience (Verhoef et al., 2015:3). Khare and Sarkar (2020:75) revealed that more consumers conduct online shopping via mobile phones as a result of its low price which has become accessible to middle to lower income groups. Herhausen, Binder, Schoegel and Merrmann (2015) define omnichannel as a phenomenon that involves customers construing all the retailers’ channels as one establishment, so that the shopping experience remains seamless no matter which channels the customer chooses. Aiolfi and Sabbadin (2017:86) describe omnichannel as an advance into a new stage of multichannel retailing.

Liu et al. (2018:3) reveal that a study conducted by the Pew Research Centre (2015) indicates that 86% of apparel retailers have established themselves on four social media channels to interact with consumers, thereby opting for omnichannel retailing. Retailers have turned to omnichannelling because it enables them to interact with their customers via various channels. Yrjölä, Spence and Saarijärvi (2018:4) underscore that a variety of channels can help the customer throughout the shopping journey, while the retailer has the opportunity to form limitless relationships with its customers. The omnichannel trend is an indication of how market infrastructure is changing technologically and physically (Jocevski et al., 2019:79). Omnichannel retailers strive to combine physical presence with online operations, allowing brick-and-mortar retailers to compete against purely online retailers (Lim & Wickenbach, 2018:133). It is increasingly the case in the omnichannel environment that consumers are shopping both online and offline at the same store (Bell et al., 2016:2).

According to Blut et al. (2018:114) and Hagberg et al. (2016:700), smartphones have contributed greatly toward the omnichannel movement as well as changes in consumers' shopping habits and behaviour.

2.7.1. Omnichannel trends: showrooming & webrooming

With the rise of omnichannel, new trends have developed with the ultimate goal of elevating customer satisfaction, and along with them new and different consumer habits (Kateva, 2018:278). Mosquera, Olarte and Anyensa (2017:168) note that the spread of mobile smartphones and social media have created different means of communication as well as new consumer behaviours such as 'showrooming' and 'webrooming'. Showrooming is when a consumer shops for a product in-store but purchases it online. Webrooming is the opposite of showrooming: a consumer spots the product online but the purchase takes place in-store (Jocevski et al., 2018:3, citing Sit et al., 2018).

Flavián, Gurrea and Orús. (2019:1) note that in a Deloitte (2017) report, 69% of customers webroomed during Thanksgiving in the United States of America, 46% of consumers physically purchased products in-store or left the store to compare prices with other retailers' products and finally made the purchase online. Currently, webrooming is the most compelling way of shopping, although showrooming continues to grow. Flavián et al. (2019:3) point out how particular channels serve as complementary functions, in terms of which the internet accompanies visits to the store. Webrooming is a more convenient and acceptable form of shopping for most consumers, enhancing customer loyalty and helping to ensure a retailer's long-term survival (Flavián, Gurrea and Orús., 2019:2).

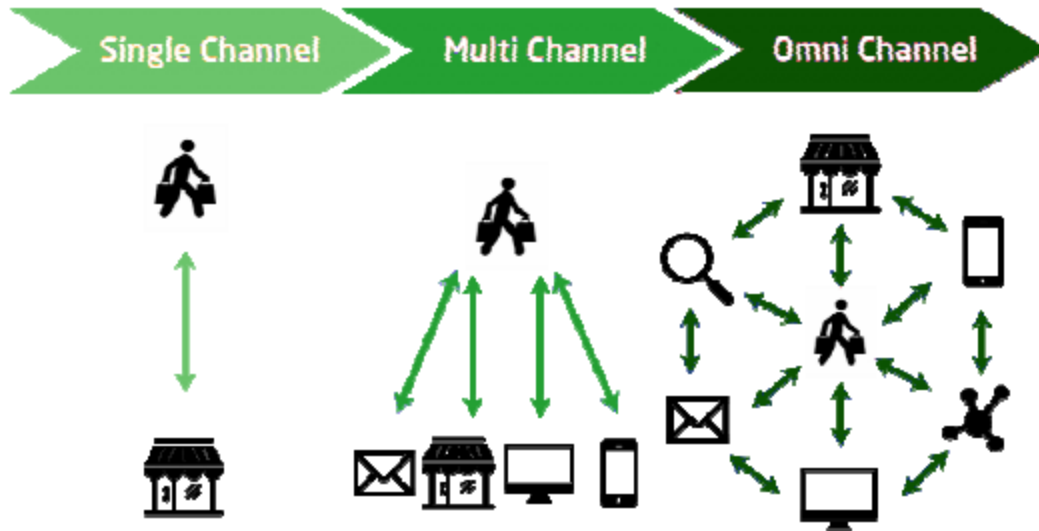


Figure 2.1: The difference between retail channels

(Source: Weiland, 2016:74)

The above figure depicts the transition from single channel to multichannel to omnichannel retailing. In the past two decades, the retail industry has been transformed by the rise of pure-play online retailers. Increased competition has forced traditional retailers to branch out and incorporate online channels into the business's existing mix, which is known as omnichannel retailing (Von Briel, 2018:2).

2.8 The difference between multichannel and omnichannel

Juaneda-Ayensa et al. (2016:2) assert that the difference between a multichannel and an omnichannel strategy is that in a multichannel strategy there is a divide between channels, but in an omnichannel strategy, there is complete integration of all channels. Multichannel essentially involve websites and physical stores, whereas omnichannel ranges from websites, physical stores, social media, to mobile phone and consumer touchpoints. Additionally, with multichannel, each channel is managed individually and customers use channels in parallel, while with omnichannel, there is a crossover between channels as all channels work together comprehensively and customers use the channels concurrently (Verhoef et al., 2015:3) and (Neslin et al., 2014).

The World Economic Forum (2017:14) forecasts that large multichannel retailers with physical retail stores will remain the most substantial financial contributors until the year 2026. More

digital business models, both offline and online, will emerge, giving rise to the next forefront of digital retail.

2.9 Pure-play retailing

Essentially, pure-play e-tailers sell only one kind of product, and sell it only online. According to Lim and Winkenbach (2019:133), pure-play online retail has become the most prominent form of trading in the American and European retail market. They claim that the retailer giant Amazon has pioneered pure-play retailing by analysing the market (including the company's own previous failures) and devising new strategies. Paul, Agatz, Spliet, and Koster (2018:2) point out that many pure-play internet apparel e-tailers are opting to expand by opening physical stores, thus offering customers multiple channels to shop. Additionally, pure players are able to offer an unlimited assortment of apparel items, whereas physical retailers are restricted to the amount of space within a store (Lim & Winkenbach, 2019:133).

Pure-play e-tailing is a paradigm for e-tailing in general and will be described in some detail. An e-tailing operation consolidates technology, infrastructure and logistics. The e-tailing network comprises a microhabitat, dealer or supplier, customer, third party companies, staff, competitors, e-catalogue, shopping cart and payment doorway, support services and the macro environment (Rath et al., 2016:1).

The micro habitat is the environment in which the retailer, supplier, competitor, members of staff and third party suppliers operate. These players engage in the retailer's operations and take an interest in the firm's dealings. The dealer or supplier sources goods for the retailer and the customers are the individuals the retailer sells to, hence understanding customer buying behaviour and customer needs is fundamental. Third party suppliers or intermediaries are those who provide delivery services from the retailer to the customer, while the employees are key to the businesses' practical functioning. Market competition forces e-tailers to reduce costs and prices in order to acquire market share. The e-catalogue depicts the range of wares in the e-store, from which items are selected for purchase. The consumer adds these to a "basket" or "cart" and then payment is made by credit or debit card (Rath et al., 2016:2). E-tailing support services are imperative throughout all channels, including logistics. Finally, the macro environment consists of the external factors that the e-tailer faces, such as government policy, societal pressures and technological upgrades and trends (Rath et al., 2016:3).

For small to medium-sized pure-play e-tailers, resources such as effective websites and software are imperative in the absence of physical stores (Xu et al., 2017:150). Once again, Amazon is one of the leading retailers to have expanded into establishing a physical presence. Nicholas Fotopoulos, the head of Adobe, notes that physical stores have changed into retailers' showrooms and for this reason merging offline and online channels is essential (Finn, 2019:2). According to the Director of the Centre of Excellence, T.J. Wu, "today, retailers still charge piece by piece, and 'one-product, one price' is going to continue for some time. However, in the not-distant future, there will be a new business model: retailers will charge by subscription like Netflix and Amazon, charge by usage or even by volume" (cited in Finn, 2019:1).

Against all the advantages customarily associated with e-tailing, Kumar and Mehra (2018:4) cite the challenges of e-crimes, inaccessibility of the internet, not being able to touch and feel items, and inconsistent times for goods delivery.

2.10 Technology

It is technology that makes multichannel retailing possible (Alexander & Cano, 2019:201-202). This includes in-store electronics such as interactive screens, product displays, and product scan points. Such technologies promote in-store interaction between the customer and the retailer, even allowing the retailer to connect with customers on an emotional level. The retailer creates these experiences with riveting new technologies, for instance, by placing digital screens in stores to reduce the gap between online and offline presence (Rai, Mommens, Verlinde and Macharis 2019:4).

Larke et al. (2018:3) optimistically describe how new technologies benefit retailer-customer interaction. This includes resolving how information is supplied to consumers, assisting in the successful movement of products, obtaining and processing significant customer data and, lastly, developing systems to incorporate supply chain tasks to assist the numerous customer touchpoints.

Traditionally, retailers and consumers had well-defined roles in the retail value creation process. Retailers led the way in terms of offerings and shoppers followed, but with the growth of digital technologies, retailers are now constantly creating value through online social connections. The relationship does not end after the purchase or delivery but instead, consumers' co-produce views via social networks using mobile phones. In this way, value formation is nurtured and built by through technology (Ramaswamy and Ozcan, 2019:19).

Grewal et al. (2018:5) acknowledge that technology is vital to enabling retailers to target customers according to their product preferences. Technology also has the ability to help consumers to compare information, make more informed purchasing decisions about products and acquire faster service. There are constant advances in technology, such as Artificial Intelligence (AI), IOT (Internet of Things), block chain technologies and Robotics. The American e-tailer Amazon is a worldwide leader in terms of adopting innovative technology and introducing new tech-savvy ways of shopping. With in-store scan and go technologies, consumers' smartphones, mobile technology such as Google maps, and store location information, the mobile channel or smartphone has proven to be at the forefront of consumer online accessibility (Grewal et al., 2018:89).

In order to remain competitive, physical retail stores are implementing multichannel services that include in-store technologies. Consumers are able to go online and into the retailer's online store whilst in the physical store. Being able to access a physical store and helps establish a personalised shopping experience for customers (Linzbach et al., 2019:43). The crucial drivers required by retailers for integrating retailing technology include safeguarding functionality and safety, assessing investments practically and being ahead of customer apprehensions (Linzbach et al., 2019:47). According to Tseng and Yazdanifard (2015:1038), functionality and safety pertains to technology that is fully operational, safe to operate, and accessible in a way that makes consumers aware of its capabilities. The implementation of any technology should not deter or discourage consumers from using the technology.

2.11 Last-mile logistics

Lim, Srai and Jin (2015:1) define last-mile logistics (LML) as the final step of a business-to-consumer transaction. The final step follows from when the order has been accepted by the manufacturer (also known as the order penetration point) and the goods are conveyed to the customer's preferred drop-off location. Hubner and Holzapfel (2016:256) cite Mercier et al. (2014:2) to the effect that that previously, retailers' supply chain management concerned the delivery of stock directly to retail stores because retail stores were the final destination. But today, online retailing has necessitated the repositioning of distribution networks, given that retailers are required to find unconventional ways of discovering, buying and returning goods among physical stores and e-stores.

The growth in e-tailing means that each product bought online, in reality, requires delivery to the customer. Most of the time, the deliveries take place in the cities, where e-consumers tend to live. The circulation of goods within the city therefore requires efficiency and the optimisation of delivery transport (Moroz and Polkowski, 2016:380). The natural environment in return is affected by the number of rides. Bertram and Chi (2018:255) follow Tiwari and Singh (2011) in dividing the environmental consequences into three groups – primary, secondary and tertiary.

The primary consequence stems from the equipment needed to execute technological systems such as computers. The secondary effect is transportation and packaging, and the tertiary consequence applies to the impact that e-tailing has on consumer behaviour and the ramifications that the behaviour has on the environment. Schöder, Ding and Campos (2016:4) note that the sustainable initiatives taken include using electric vehicles which reduces emissions, night deliveries to decrease traffic and congestion, vigorous vehicle routing and improving communication with customers.

Last-mile logistics configurations differ vastly between hybrid retailers and e-tailers because the environment is impacted in a different way (Bertram & Chi, 2018:256). Bertram and Chi (2018:261) have determined that e-commerce produces less of the carbon emission brought on by individual activities such as the vehicles used to drive to the shop and packaging.

Alfieri, Marco and Pastore (2019:1693) note that, as reflected in consumer impulse buying, the desire for new fashion trends is high. Fashion or apparel items have short life-cycles, inconstant demand and limited production and distribution lead times (Alfieri et al., 2019:1693). Nonetheless, last-mile logistics remains the costliest part of the supply chain (Bányai et al., 2018:1). Olsson, Hellström and Pålsson (2019:2) argue that improvements in products, an interlinked supply chain and data-driven activities are key elements for last-mile delivery. The combination of design and the implementation of technology in logistics suggest that outsourcing third-party logistic companies is a significant cost-cutting tool.

Daugherty et al. (2018:26) demonstrate that technology and social media have improved communication and transparency in dealings with logistic companies and shipping services. Subsequently retailers are able to customise customer experiences and optimise communication concerning delivery and estimated times of arrival.

2.12 Logistics in South Africa

Ittmann (2018:1) explains that the Logistics Performance Index (LPI) measures the performance of many countries globally, as calculated by experts in the logistics industry. In 2018 South Africa ranked 33 out of 160 countries, which indicated an overall satisfactory performance. Logistics continue to be a key pillar of growth and development in the South African economy.

Goga et al. (2019:23) observe that in South Africa e-tailers utilise logistics in various ways. One system is vertical integration, through which the e-tailer purchases a delivery company: an example of this is Takealot purchasing Mr Delivery. The second approach is the store distribution chain whereby retailers maximise warehouse and delivery points by mobilising distribution networks to other retailers. For instance, Pick n Pay and Makro have opted for this system. Thirdly, subcontracting logistic companies involves e-tailers' utilising courier companies such as UAfrica. The courier collects the packaged goods from the manufacturer or seller and distributes them to the customer. Kneale (2015) reveals that there are currently 300 courier companies registered in South Africa, and that there has also been an increase in separate independent delivery models.

2.13 Challenges of logistics

Goga et al. (2019:23) note that among the challenges that e-tailers are facing is that they are placed under immense pressure to provide free shipping and free delivery. This is costly and affects the business's bottom line. Also, consumers' expectations are high, many anticipating same-day delivery, which forces retailers to increase the speed flexibility of distribution networks. Daugherty et al. (2018:20) reveal that logistics has become extremely competitive, for instance, Alibaba offers an in-depth online shopping experience which includes the history and origins of products as well as a 30-minute delivery time assured in certain cases.

Finally, the task of administering and supervising customer queries during last-mile delivery continues to present problems. In spite of this, Daugherty et al. (2018:23) affirm that omnichannel e-tailing requires e-tailers to ensure that each channel complements the others and does not compromise the customer's experience. Internationally, the Vice General Manager of Cross Border Trading's Business Department in China has declared that cross-border retailers' main focus should be on developing close relationships with direct platforms and established logistic solutions (Finn, 2019:1).

2.14 Challenges of cross border logistics in South Africa

Goga et al. (2019:21) point out that South African retailers experience difficulties with international shipping. South Africa is geographically distant from most economies involved in the production of goods, which makes the cost of shipping relatively high. Moreover, local post offices which are owned by the South African government are costly and the long lead times endured for the delivery of goods can mean that packages take up to two months to be delivered.

Theft is another obstacle as Amazon blacklisted South African post offices in 2008, and now only deliver via courier. Lastly, Goga et al. (2019:22) mention customs and taxes up as an abiding problem for logistics companies and e-tailers. Clearing shipments for tax purposes and abiding by legislation results in unpredictability and a lack of transparency. Ittmann (2018:2) agrees that the post offices are a major concern, with the main grievances being service unreliability due to lost items, poor customer service and an inability to efficiently track and trace registered parcels.

2.15 Social media

The growth in e-commerce and individuals' increasing dependence on e-commerce has prompted social media companies to collaborate and work with businesses (Javid and Ghaeli, 2019:269). Businesses depend on social media networks as advertising and marketing tools. Javid & Ghaeli (2019:270) observe that social media networking sites such as LinkedIn, Twitter and Facebook open doors for new businesses that operate solely on the internet, which have been dubbed 'social commerce' businesses. This type of business uses the web and social media infrastructure and technologies to sustain and support its online operations.

Algharabat and Rana (2020:1) define 'social commerce' as the action of buying and selling goods and services via social media, and suggest that it has become the main mechanism for virtual shoppers. Yet again, the importance of business strategy is underlined: companies are obliged to adopt new business procedures that support social commerce business interaction. Nadeem (2016:13) lists the characteristics of social commerce as a meeting place and communities, customer ratings and critiques, consumer testimonials and referrals, marketing and social shopping tools such as Facebook and Twitter. Furthermore, Mason et al. report that since the emergence of Covid-19, the social media have become even more significant for retailers' marketing strategies because of their influence on consumers' purchasing decisions

(2021:13). Vinoth and Dilip (2020:2337) findings confirm that social media marketing has a significant impact on both male and female consumer behaviour, improving their ability to make well informed purchasing decisions. The results further recommended that companies focus on using social media more to reach their consumer groups.

The social media function as a conglomerate of elements of the promotion mix, allowing companies to communicate with their consumers as well as consumers to communicate directly with one another (Garczarek-Bąk & Szymkowiak, 2018:119). Tripathi (2019:107) explains that social media enable entrepreneurs to develop social media websites and services with complete social media network performance. Mobile social media constitute an especially influential tool for retailers owing to their ability to create relationships with individuals and enhance brand promotion (Zhang, 2015:13). Retailers are able to learn about and understand customers' perceptions as well as support the company's mission and achievements. Customer loyalty is established and can continue to grow, especially on real-time social platforms such as Twitter and Instagram (Rasool, Tao, Marjan and Naveed, 2019:2). Arguable, the social media are collectively speaking the simplest, most affordable knowledge management instrument (Budree et al., 2019:316) Nadeem (2016:22) points out that popular brands such as H&M and Calvin Klein have millions of followers on social media platforms, which allow them to post information about new arrivals, end-of-season sales and provide a complete space for retailer to customer interaction. The social media therefore provide an excellent platform to promote apparel trends and ranges. Clothing retailers not only use social media as a marketing strategy, but also make use of fashion bloggers. Fashion bloggers and influencers post on social media platforms about apparel items to a large following, which results in brand advertising (Ahmad et al., 2015:3).

Jacobson (2020:1) notes that retailers following different business models can all benefit from social media. Design teams working for apparel retailers can combine social media with predictive analysis to capture ideas for new products. Nash (2019:8) suggests that consumers' online reviews are more impactful than expert reviews.

2.16 Characteristics of South African online shoppers

South Africans are moving swiftly in the direction of digital commerce (Mapande & Appiah, 2018:2). South Africa's business sector is benefiting from online growth as a result of the increase in the usage of mobile phones nationwide. It has been predicted that there will be a year-on-year growth rate of 15% from 2018–2021. According to Van Scheers, Makhitha and

Mogashoa (2019:314), consumers seeking convenience, variety and value make up the population who shop online in South Africa.

2.17 Online Shopping

Singh (2019:2) defines online shopping or e-shopping as purchasing goods and services on the internet. Online shopping has become a global activity where barriers associated with location and payment methods no longer exist. Temjanovski and Ristevska (2019:46) underscore that online shopping is the most affordable and simplest form of commerce. Predicted to be the largest retail channel by 2021, online shopping is exceeding supermarket and retail stores sales, including apparel stores, in regions such as China, South Korea and Western Europe (Temjanovski and Ristevska, 2019:49).

Fashion, clothing and apparel items have a major effect on social cultures worldwide, which means that online shopping for them is definitive for many groups, including retailers, manufacturers, consumers and marketers. Individuals who enjoy and identify with fashion and apparel treat the web as informative and useful for browsing or shopping (Zhang, 2015:13).

2.18 E-satisfaction

According to Azamussan and Kumaran (2018:180), e-satisfaction results from a consumer's recognition of online convenience, appreciation of website design and merchandise layout, and feeling secure when making a payment. Online satisfaction is essentially a customer's emotional reaction to an online shopping or buying experience.

Vasić et al. (2017:72) explain that this satisfaction is the result of consumers' expectations versus the actual experience. When a retailer exceeds expectations with delivery on service and other shopping factors, the consumer is satisfied. The components for customer satisfaction are product attributes, web design, safety and protection, information quality, payment process, e-quality of the service, product scope and service delivery. For instance, Daugherty et al. (2018:20) claim that Amazon's ability to remain successful is a result of a strong distribution system, while using market dominance to focus attention on improving the customer experience.

Alan et al. (2017:203) cite Bailey (2015) in positing that high satisfaction in customer experience is a cue that a retailer has a clear comprehension of the complexity of the marketplace. A study based on social media platforms such as Facebook, LinkedIn and Twitter conducted by Krishen

et al. (2015) reveals that easy social interaction and providing quality information increase customer satisfaction, customer loyalty and the need to engage in online activities. E-tailers should implement after-sales support and smoothly resolve customer concerns or complaints, thus maintaining customer loyalty (Al-dweeri, Obeidat, Al-dwiry, Alshurideh and Alhorani, 2017:98). In sum, E-satisfaction has become exceptionally important in attaining success and competitive advantage (Al-dweeri et al., 2017:94).

2.19 Online shopping behaviour

Tripathi (2019:106) observes that when consumers purchase apparel items online, a certain behaviour is displayed. The behaviour is directly linked to the product traits, e-store, logistics platform, information attributes, website's technical distinctions and finally, the website's home page layout. According to the South African Council of Shopping Centres (SACSC, 2016), South Africans shop online because the process is faster, enables price comparisons, allows worldwide shopping, and offers both variety and convenience. The internet has an impact on consumer behaviour and consumers who shop online are inclined to behave differently when making a purchase decision (Kwarteng & Pilik, 2016:91). For instance, according to Mahalakshmi and Kathiravan (2019:141), online shopping has increased consumers' impulsiveness to buy goods and services. Impulsive buys are spur-of-the-moment purchases that happen quickly and unexpectedly without any necessary prior intention. Rahman, Islam, Esha, Sultana and Chakravorty (2018:22) findings indicate that unlike traditional brick n mortars, consumers online shopping behaviour are influenced by factors such as security, websites visual appearance, age and many more factors. The study recommends that tech entrepreneurs develop strategies based on these factors to attract and retain the market.

Despite the fact that all consumer motivations differ, the webrooming trend is yet another example of consumer behaviour or that Gurra et al. (2019:2) refer to as "cross-channel behaviour". Daugherty et al. (2018:5) and Foroudi (2018:272) point out that as of recently, fast delivery and efficient service has created customer impatience. Millennials in particular have grown up in a technological era that has brought with it an expectation of speed and therefore a retailer's logistics system requires constant development.

A sense of association and connectivity, whether with a brand or with other consumers, encourages consumers to feel supported whilst shopping and purchasing online. A study conducted by Cho and Son (2019:14) revealed that social connections made on the social

media gives rise to virtual communities and a sense of community. Social communities have a direct impact on consumer behaviour. According to Mehta et al. (2020:299), as a result of the Covid-19 pandemic, consumers have developed new habits and online shopping behaviours which have created growth opportunities for e-tailers.

2.20 Chapter summary

This chapter focused on how e-commerce has allowed the internet to become a commercial marketplace, with B2C being the most common form of e-commerce. International companies such as Amazon and J.D.com are the leading e-commerce businesses, paving the way for other players in the industry. Apparel retailers have benefited from e-commerce, increasing the number of channels to be able to interact with customers.

On the other hand, the challenges that e-tailers face vary but include customer returns, South Africa's lack of digital capabilities, and shifts in the economic macro-environment. It seems that South Africa will continue to follow e-tailing trends set by more advanced countries. Over time, single channel retailing developed into multichannel retailing and now retailing has transitioned into hybrid retailing. Retailers are able to interact via platforms such as social media, on mobile phones, in the physical store, TV, radio and on the internet. Omnichannel trends include 'showrooming' and 'webrooming', which give consumers the option of shopping in store but making a purchase online and vice versa.

Pure-play retailing has grown over the years, with more and more businesses trading solely on the internet. Technology is a core component that drives business and essentially enables online shopping. The social media provide a number of platforms for retailers to connect with consumers, and smart phones have made it easier for individuals to communicate, interact and make purchases.

Logistics may be seen as the final step in purchasing goods online. Retailers face the challenge of refining distribution networks while remaining environmentally conscious. Challenges for South African retailers stem from the country's unreliable post office, customs duties and high logistical costs.

The social importance of clothing and apparel has created a culture of online shoppers, of individuals seeking fashion, convenience and customer satisfaction. Achieving customer

satisfaction assists retailers in obtaining competitive advantage. Similarly, understanding consumer behaviour can predict purchasing decisions.

From the particular perspective of the current study, e-commerce requires essential ingredients in order to be competitive and remain competitive and profitable (Varela & al., 2017:7). But according to Ferreira, Varela, Putnik and Cuhna (2017:2), online retailers' success has been inhibited over the years because the means and measures of success have not been clearly identified. Identifying the key enablers that are required to conduct and operate a successful business will generate a standard set of activities for apparel e-tailers across the country. The identification of these activities should be continuously revisited, with the result being long-term performance (Khan et al., 2019:3). Varela et al. (2017:2, 14) confirm that the e-tailing space may be viewed as an inviting virtual marketplace, but starting an online store does not guarantee success and therefore knowing the essential components is key in building a profitable e-tailing business.

CHAPTER THREE: THEORETICAL FRAMEWORK AND LITERATURE REVIEW

The previous chapter provided some context for e-tailing and the business environment in which e-tailers operate. This chapter will focus on the study's theoretical framework. Its purpose is to establish a theoretical foundation and identify the research gap that the study seeks to address.

3.1 Theoretical framework

Adom et al. (2018:438) define a theoretical framework as a "blueprint" for any research study. The framework is formulated from an existing theory related to a researcher's area of study. Ngulube (2019:3) explains that the theory links the immediate body of knowledge to greater fields of knowledge. Once information and perspective has been collected through the literature review, a theoretical framework is selected to explore the area of study. A theoretical framework creates a structure connecting the data, its interpretation and the research questions (Hughes et al., 2019:27).

3.1.1 General systems theory

This study adopted a general systems theory as introduced by Ludwig von Bertalanffy in the 1940's. General systems theory was derived by building models based on highly mathematical

subjects and specialised topics relating to biology, social sciences and psychology (Ramosaj & Berisha, 2014:60). Pickel (2011:246), citing Bunge (2004:188), describes a system as a complex entity whose parts are connected by bonds which are logically linked in the form of a conceptualised system such as a theory. A functioning organisation would be an example of such a system. Von Bertalanffy (1968:33) defined a system as a “complex of interacting elements” for which theoretical models or frameworks could be constructed (Von Bertalanffy, 1968:36). Online retail is made up of integrated business processes, channels and various platforms such as internet webpages, warehouse storage centres and product distribution centres, which require efficiency and coherence (Rosário & Raimundo, 2021:3010), similar to the General Systems framework. Mele et al. (2019:127) add that essential to a general systems theory are the interactions between components and the relationships within the system. This perspective concentrates on describing distinct functions, behaviours, relationships and interactions that take place internally or externally to the system (Pickel, 2011:241).

Because Von Bertalanffy originally conceptualised systems theory on the basis of an organisation, general systems theory is in essence an organisational theory (Friedman and Allen, 2014:4). Chikere and Nwoka (2015:3) note that Von Bertalanffy differentiated between two types of system, open and closed.

This study approached its subject as an open system, which is one in which the organisation or business interacts with the larger external environment. An open system approach focuses on relationships formed between the business and its environment. A fundamental aspect is the ability of the organisation to adapt to change (Mele et al., 2010:127). A closed system would mean that the business operates in isolation and does not interact with its external environment, comprising government, societal forces and economic and political factors (Lai & Lin, 2017:5).

Figure 3.1 illustrates how an open system functions in what is effectively a cause-and-effect relationship with the environment (Friedman and Allen, 2014:9). Elements or ‘inputs’ such as people, resources or technology are imported into the system from the external environment. These elements are processed internally and referred to as throughput. Once transformed, they are exported back into the external environment and called ‘output’ (Thien & Razak, 2012:892).

The system seeks to achieve balance and long-term organisational survival. It is therefore regulated by a process called ‘feedback’, which is a benchmark to determine if the system’s outputs are consistent with the organisation’s goals. Feedback channels enable the organisation

to improve and adapt to any necessary changes by responding to effective communication channels (Weber & Waeger, 2017:888).

Figure 3.1 also presents the relationships among the inputs such as strategic tools, CSFs, any changes and updates in technology and staff and resources required in order to create outputs such as products and services, campaigns and a presence on social media platforms (Lai & Lin, 2017:1). The way that the inputs are transformed in the throughput stage are unique to the organisation, involving the decisions and integration of the management system, the levels of communication throughout the organisation, how decisions are implemented in every department and lastly, the need constantly to improve, monitor and remain flexible in all situations. In this study, the systems theory acts as a lens and puts the CSFs at the forefront of the study. A viable systems model is based off realistic facts and observations, providing a way to envision and understand the situation in more detail (Alter, 2018:6).

Subsequently, similar studies relating to the CFSs of online retailing/e-commerce and the analysis of e-commerce business models indicate that the business corresponds with the systems theory model. The components in the model are well planned, interrelated, depends on efficient and effective communication, its goal seeking and revolves around the inputs, throughputs and outputs of the system, resembling the key factors for online retailers (Alter, 2018:3). A study conducted by Maes and Hootegem (2019:12) adopted a generic systems model for organisational change, this meta model measures changes internally and in the external environment. The results indicate new possibilities to view changes in the organisation, the way change occurs and the systematic approach provides a holistic view, depicts elements logically with the interdependencies within the system. However, the study does not focus on online retail in South Africa.

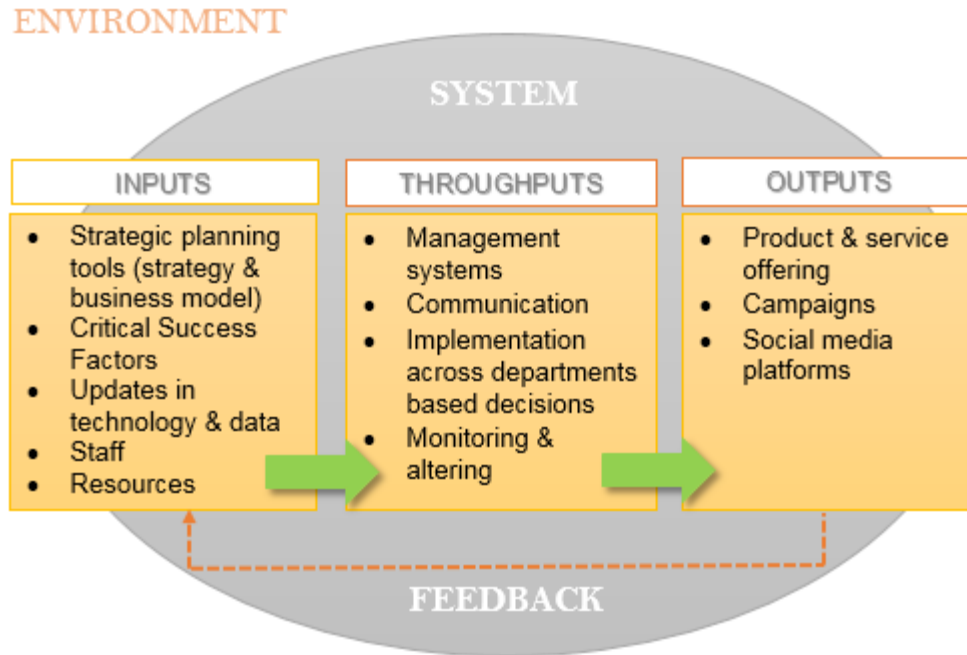


Figure 3.1: Theoretical framework of an open systems theory

3.3 Literature review

This review will focus on the following thematic areas: first, a review of the current e-tailing models; secondly, the concept of critical success factors; thirdly, types of e-tailers, and fourthly, what apparel e-tailers face in a business environment subject to external factors of a political, economic, social, and technological nature (PEST). A fifth topic is the importance of developing an e-strategy as an e-tailer and its connection to CSFs, and a sixth topic, the business model which e-tailers follow. The seventh topic will be the barriers e-tailers face whilst operating in South Africa. Lastly, the opportunities in apparel e-tailing will be reviewed to gain a greater understanding of current potential and hindrances in the industry. The chapter will conclude with a chapter summary.

3.3.1 Review of the current apparel e-tailing models

3.3.1.1 A study by Goga, Paelo and Nyamwena (2019)

This study provides an in-depth overview of South African online retailers. The study does not provide a growth model but the data provided in the study outlines South African e-tailer contributions, opportunities and threats, reasons for slower e-tailer growth and insight into e-

commerce models and their operations. Goga et al.'s (2019) study contributed greatly to the researcher's understanding of South African online retail.

3.3.1.2 A study by Hassen, Rahim and Shah (2019)

This study recognises models that e-tailers in developing countries can adopt to understand e-commerce, utilising different theoretical models such the Technology Acceptance Model (TAM) and the Unified Theory of Acceptance and Use of Technology (UTAUT) model, which categorises CSFs for e-commerce established over the past 25 years. However, the study was conducted in Algeria, and in fact concluded that the models it explores are not entirely suitable for e-commerce adoption. This model therefore lacks immediate relevance to this study.

3.3.1.3 A study by Varela, Vieira, Araújo and Manupati (2017)

Another e-commerce model is a conceptual framework based on the CSFs identified for e-commerce called a multi-perspective critical success factor (MPCSF) model, which can be interpreted by online retailers globally (Varela et al., 2017). This framework did not include a broader growth dimension and lacked sufficient data to be compared to the growth model in this study, so had little direct relevance to the current study.

3.3.1.4 A study by Gyenge, Máté, Vida, Bilan and Vasa (2021)

This study focused on developing a strategic marketing model of e-commerce in the supply chain which concentrated on social media platforms and mobile commerce, but limiting its scope to how e-tailers can grow only one aspect relating to e-commerce. This, together with the study's focus on Hungary, diminished its relevance.

3.3.1.5 A study by Trong and Tran (2021)

This study addressed the question of effectively managing e-commerce platforms in a pandemic. The study proposed a perceived effectiveness of e-commerce platforms (PEEP) framework using gratification theory. While this study is pertinent for all e-tailers, the model does not correlate with the growth model recommended in this study.

In summary, all these e-tailing models differ from the model presented in this research study. Specifically, the models do not focus on growth and development for South African e-tailers, taking into account internal and external environmental factors peculiar to South Africa. In

addition to the studies' foreign locations, they mostly addressed only one aspect of online retail, whereas this study provides a comprehensive growth model with a number of ingredients for success. This brief survey indicates that there is a gap in the literature relating to South African e-tailing growth models and suggests the need for the customised model developed in this study.

3.3.2 Concept and significance of CSFs

D. Ronald Daniel introduced the concept of CSFs whilst John F. Rockart popularised the concept in 1979 (Hamdan et al., 2018:168; Fredrik, Marcus and Johan, 2014). Mungree et al. (2013) explain that critical success factors are factors that identifiable in a business that result in positive stakeholder confidence. CSFs present a clear and accurate impression of an organisation's business environment as well as the crucial steps needed for it to achieve its goals (Forster & Rockhart, 1989). The concept of CSFs therefore theorises business activities that must be performed well in order to succeed and secure competitive performance no matter the type of business (Hamdan et al., 2018).

3.3.3 Types of e-tailers

Baskaran and Keloth (2018:40) maintain that e-commerce is simply the purchasing of goods or services online, and therefore any transaction made via the internet is what we refer to as e-commerce. There are two major types of business e-tailing models, and these are pure-play online retailers and omnichannel or hybrid retailers (Zhuang & Lederer, 2008). Online only or pure-play retailers purchase goods, add a mark-up, resell and deliver (Goga, Paelo and Nyamwena, 2019:18). In contrast, hybrid retailers adopt online as an additional channel to sell their goods, creating a cross channel experience involving physical and online (Nagula & Lui, 2020:2).

Sarkar and Das (2016:9) explain that because purely online retailers depend entirely on the internet to "push" goods, eliminating the physical channel, logistic firms and C&F agents, marketing tools such as advertising/internet advertising and promotions are of vital importance (Sarkar & Das, 2016:10). An unlimited number of products can be sold, whereas this is not the case for omnichannel retailers (Sarkar & Das, 2016:11).

The 116-year-old international menswear retailer Austin Reed experienced bankruptcy in 2016, resulting in 120 store closures and 1000 job losses. This has been attributed to their reluctance to adapt to an omnichannel approach (Lim & Winkenbach, 2019:3).

3.3.4 The business environment

Hans (2018:67) points out that businesses do not operate in isolation but in an environment that provides them with both opportunities and challenges. It is therefore imperative for businesses to analyse and effectively respond to changes in the environment. PEST analysis is a tool that identifies factors in the external environment that the organisation is exposed to or which may have a direct impact on the organisation (Phan, 2021:38).

Strategy planning and analysis is a basic step in the management process, and necessarily involves the examination of factors in the external environment most pertinent to the company (Yuksel, 2012:52). Abdullah and Shamsher (2011:1447) describe PEST as the analysis of any industry sector addressing macro-economic issues. Understanding the current state of the business environment in which these e-tailers are operating assists in determining organisational performance and ongoing success. For example, an increase in taxes may affect import duties and consumers' willingness to purchase goods. Technological advancements may impact the operations and governmental decisions such as industry laws and regulations that can influence how business will be conducted (Tran, 2019:1988). Businesses develop strategies – or in this case, an e-strategy – to remain sustainable in the environment in which they operate.

3.3.5. Developing an e-strategy

According to Cagliano et al. (2003), an e-strategy refers to “how the web-based technologies can restructure organisations by providing them with a new competitive edge”. Elof and Labuschagne (2001) add that an e-strategy is a long-term objective put in place to determine how the business will tackle environmental threats and optimise business opportunities available in the market. Developing an e-strategy involves determining how information technology will be able to sustain the organisation in order to maintain a competitive advantage and optimise their digital blueprint (Hariandja & Afsari, 2016:4).

Jelassi and Enders (2004:8) point out that although technology is the principal focus of the business, technology cannot be a replacement for strategy. CSFs are established to support business strategies and the overall mission of the organisation by providing tactile outcomes

(Gates, 2010). In order to achieve organisational performance, which is based on business model strength (Almatrooshi & Singh, 2016:844), strategy implementation is vital. Viehland (2000:912) co-ordinated six critical success factors from several authors revealing why organisations should pursue an e-strategy, and how to do so.

These factors include creating a customer-orientated strategy; being in favour of outsourcing; proceeding to act like a newcomer; using information techniques to be unique; establishing territory for the business as an e-tailer, and lastly ensuring that top leadership is well integrated. Other authors have emphasised the importance of a long-term e-strategy that includes deciding on the nature of the business, establishing business objectives, conducting a feasibility study identifying CSF's, designing e-commerce websites and lastly, execution of these (Yuliansyah et al., 2017:57). Jelassi and Enders (2004:8) question the need for a long-term strategy, given that when disruptive innovation arises, market changes occur, making sense of an adjustable short-term strategy.

According to Viehland (2000:912), an e-strategy recognises the positioning of the business in the market. CSFs are established during the strategy formulation process (Elnaga and Al Shammari, 2016:76). CSFs are strongly connected to strategic goals, although the mission and goals focus on purpose and what the company would like to achieve whereas CSFs focus on adding value through the planning process (Tsironis et al., 2017:876).

3.3.6 E-tailing business model

As the retail landscape changes so does the development of new business models. The business to consumer (B2C) model is the type of business model an e-tailer is most likely to follow. This direct interaction renders the internet the retail market where the consumer shops, makes the payment and receives the goods. The B2C business model refers solely to a business selling goods or services to consumers, such as books or clothing online (Baskaran and Keloth, 2018:41).

An e-commerce business model may be seen as a set of organised undertakings aimed at making the business profitable in the long-term (Aithal, 2016:102; Tamilarasi & Elamathi, 2017:35). The business model may be seen as "the logic of the firm" and establishes how the business decides to compete (Ricart, 2009). According to Ulwick (1999:4), the business model gives rise to the business strategy, which is merely a plan describing how the company intends to achieve its objectives as set out in the business plan or model (Dobni et al., 2018:3).

The National Development Plan (2018) affirms that the Wholesale and Retail Sector is the fourth largest and most profitable contributor to the South African economy. As much as 86% of the legal recorded businesses in this sector are small and micro-businesses. Company A & Company B in this study are successful start-ups (Smith, 2018). Heller et al. (2019:119) maintain that small-medium enterprise (SME) follows an entrenched business model, whereas start-up business models are created according to social factors and software (Bednár & Tarišková, 2017:239). Start-ups are derived from excellent ideas and may be seen as “newly born” companies with a developing business model. Private investments and underdeveloped business models are identified as the main reasons for start-up failure (Salamzadeh & Kesim, 2015:1). The Covid-19 pandemic has had a major influence in the way consumers use digital platforms, and online retailers have been required to find smarter more innovative solutions to ensure their business model conduces to profitability (Aravind et al., 2021:5024) .

Nguyen-Duc, Birkeland, Pappas and Jaccheri (2017:4) note that start-ups tend to be high risk whereas SMEs are low risk. Start-ups experience higher growth rates than SMEs but depend on private investments, while SMEs are self-funded or dependent on bank loans. A study conducted by CB Insights (2021) disclosed that 70% of the start-up businesses tech companies fail for lack of a concise business model (Akter and Iqbal, 2020:435). Parida et al. (2018:2) argue that when the most appropriate business model is employed, businesses reap the benefits of applying technology as well as development opportunities. Businesses can gain by building business models around digital technologies.

Erlyana and Hartono (2017:1) reveal nine building blocks for a business model, which include customer division, value proposition, channels, customer relationships, revenue channel, key partners, essential activities and costs. These components of the business model define the reasoning for relationships and structures. Tamilarasi and Elamathi (2017:35) and Alibage and Ahn (2018:7) prefer to describe an e-commerce model in terms of the market, value proposition, value chain, cost and profit, value network and a competitive strategy. Thus the *market* in which the business is trading should clearly be understood by examining market conditions and ensuring that market strategies are in line with the business model. The *value proposition* tells the customer why they should purchase from the business (Alibage & Ahn, 2018:7). Goga et al. (2019:14) highlight the importance of the *value chain*, stretching from from selecting an e-commerce store to delivering the goods. Keeping an eye on economic output results in determining *costs* whilst remaining sustainably *profitable*. In order to control the *value network*, an analysis of interactions between the firm’s individuals and resources should be identified

both internally and externally (Goga et al., 2019:15), thereby helping to define a *competitive strategy*.

Nevertheless, one should not ignore the fact that all business models have to endure the effects of megatrends (such as urbanisation, mobility, education and several others) and technological trends (namely robotics, the internet of things, big data, etc.) (Tewes et al., 2018:39).

3.3.7 Barriers to e-tailing in South Africa

Although online retail continues to grow, there remain challenges to overcome (Broll Property Group, 2019). Lee and Barnes (2016:34) indicate that payment security risks and privacy concerns continue to be rife among consumers, which ultimately affect their willingness to purchase online. While payment barriers mainly affect low-income groups (OECD, 2019), concern about leading e-tailers dominating the market are growing (Goga et al., 2019:30). Market domination makes entry into the market tougher for newcomers. In addition to the above challenges, consumers are not keen on delivery costs that are added to online purchases (Haron et al., 2019:1387).

The NDP (2019) notes that South Africa continues to struggle with rural area penetration, a struggle associated with high unemployment and poor infrastructure. General societal inequalities in terms of income, race and gender have a generally negative impact on overall e-tailing growth. In addition, South Africa's e-commerce trading environment includes industry drawbacks such as trading barriers on imports and exports as well as government regulation (Budree, 2017:5).

Since Budree's (2017) research, modifications and policy updates have been put in place. Nkuna (2018) notes that the Department of Telecommunications and Postal Services has developed an updated national e-strategy that will slowly be implemented by giving power to SMMEs, implementing digital e-commerce strategies, and initiating measures to accommodate the fourth industrial revolution. The NDP (2019) notes key challenges to overall digitalisation, including factors such as e-literacy, slow economic growth, substandard levels of innovation and numerous others. Information Communication Technologies (2019) governs the internet and all networks nationwide, promoting the private sector by enhancing credit capacity but at the same time implementing laws and regulatory frameworks. A number of these governmental frameworks relating to technology, digitalisation and e-learning date back to the year 1996 and can do with some modernising (Nkuna, 2018).

The OECD (2019:3) adds that there are several challenges in achieving an innovative business model such as a lack of incentives to investment, government regulations surrounding the industry and complicated rules that leaves the customer having to pay for unforeseen taxes. Such challenges may form part of the business environment apparel e-tailers and are drawbacks for retailers who have attempted and are trying to adopt an e-tailing business model (OECD, 2019:3).

3.3.8 Opportunities for e-tailing in South Africa

A market analysis conducted by Brady (2018) indicates that the majority of South Africans' internet usage takes place via mobile phones. The easier access to the internet that this allows enables e-tailers to advertise and attract customers, which in turn encourages online shopping (South Africa, 2019).

E-tailers entering the market are experiencing a smoother set-up in terms of technical restrictions, meaning that online stores can now be set up without taking on developers and programmers to translate designs and other computer applications needed. There are now readily available templates as well as consolidated payment systems (Goga et al., 2019:32).

Statista (2019) reveals that around 22 million South African's utilise smartphones, and 75% of website traffic goes through those phones (Qwerty digital, 2017). Facebook and Instagram have the highest social media usage in South Africa (Opera, 2018; Data Reportal, 2019). Whether or not it occurs via these social media, a mobile phone can be seen as a "gateway to a relationship between the consumer and the retailer" (Ström, Vendel and Bredican, 2014:2).

The above opportunities should encourage e-tailing. Although the NPD has developed strategic goals within a 30-year plan for digital integration, the overall regulation of e-tailing and e-commerce requires consistency across all regulatory bodies to promote growth (Goga et al., 2019:37).

Given how the advent of the Covid-19 pandemic has affected retailers globally, omnichannel retailers should focus more on their offline stores, strengthen their promotions and logistics and focus on improving their digital capabilities. Although the pandemic has resulted in losses, it has forced online retailers to revisit and adopt new strategies, creating potential opportunities for all (Indriastuti & Fuad, 2021:472).

3.3.9 Chapter summary

This chapter began with explaining the general systems theory, underscoring that an open systems main focus depends on its relationships formed and the interconnectedness of the elements within the system. Such as a system, the business cannot operate in isolation hence; the external factors in the external environment/system should always be taken into consideration while making strategic decisions. The components that the system sets out to achieve such as effective communication, inputs, throughputs and outputs are factors that are too required by online retailers.

The concept of CSFs was explored and their significance in an organisation underscored. CSFs respond to the business environment and their identification enhances direction and creates competitive advantage. It is imperative for businesses to analyse and effectively respond to changes in the environment and the PEST analysis was found to be an effective is a tool. Pure-player online retailers were distinguished from hybrid retailers (examples of each having been chosen for case study in this research). All e-tailers are however subject to external environmental factors known as PEST, which provide both opportunities and challenges.

The literature emphasised the importance of a business strategy, which assists e-tailers in gaining a competitive advantage in the market. An organisational strategy also helps to create and ensure sustainability. However, technological disruptions and market changes question the need for long-term strategies, and raise the possibility that in this field what is needed are strategies that are short-term and flexible.

The B2C business model was identified as the most common in e-commerce. The business model and resultant strategy remain at the core of the business, determining objectives and the outcome of decisions as well as presenting the value proposition to the market. Two of the organisations in this study were established as start-ups or online platforms, relying heavily on technology and software, whereas the other two organisations are hybrid or online-offline e-commerce businesses.

Barriers for e-tailers point mainly to socio-economic factors and in the tendency for larger e-tailers to dominate the market. Nevertheless, opportunities such as those afforded by a general increase in technological understanding, access to social media and smartphone usage signal a positive outlook on e-tailer growth.

CHAPTER FOUR: RESEARCH METHODOLOGY

Research methodology is the “science” of how research is carried out in a methodical manner (Mishra & Alok, 2017:1). According to Schvaneveldt and Cohen (2010:1) cited by Sarantakos (1998) research methodology is “theory of methods”, the way an individual makes sense of the object being investigated. Saunders and Tosey (2013:58) claim that the most effective way of developing a research methodology is by deconstructing the research process, layer by layer. Known as the research onion and reproduced below, the diagram assists in describing the fundamental layers that determine the choice of data collection and analysis methods (Saunders et al., 2019:128).

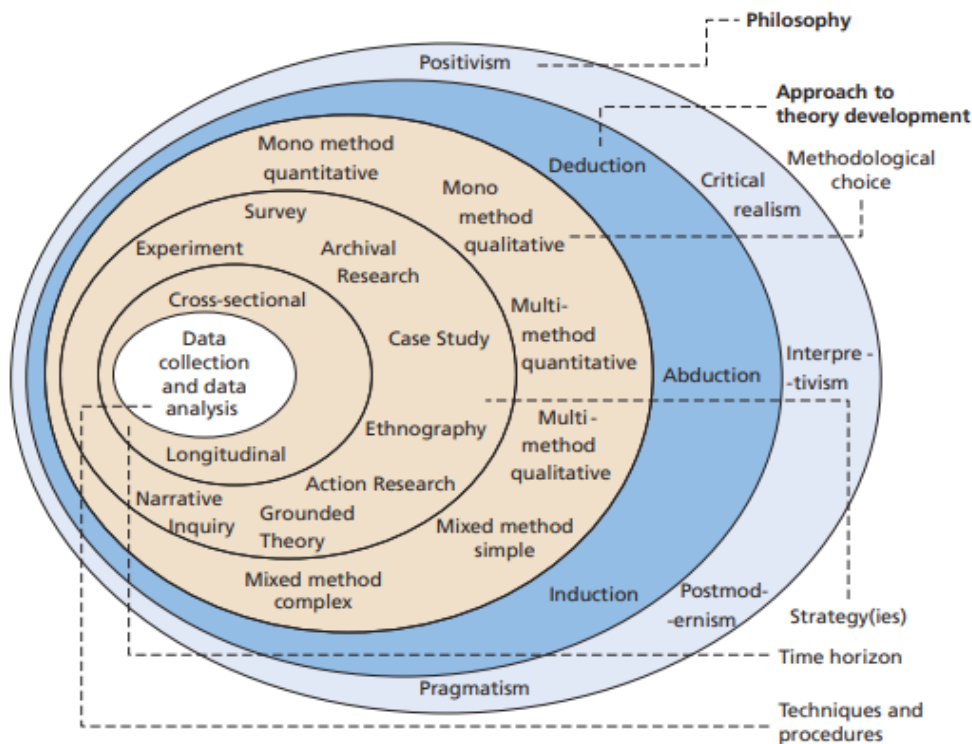


Figure 4.1: Research onion

Source: Saunders et al. (2019:130)

The following sections introduces the design and orientation of the study, working inward from the philosophical assumptions of the research to the practical methods employed.

4.1 Research paradigms: assumptions

Research paradigms are basic belief systems with philosophical assumptions about ontology, epistemology and methodology present throughout the research process. To understand one's research philosophy is to become conscious of one's underlying beliefs and worldview (Saunders, 2009:127). These include elements of ontology and epistemology.

4.1.1 Ontology

Rehman and Alharthi (2016:51) define ontology as "the nature of our beliefs about reality". Our ontological assumptions therefore frame how we make sense of a phenomenon. Considering that this is an interpretive study, it rests on the belief that social reality that is constructed by humans and their interaction with another (Andrade, 2009:43). It is therefore possible for there to be multiple realities (or interpretations of the 'real') that are formulated socially (Pham, 2018). In a sense, then, interpretivists dismiss the objective world. Alternatively, reality is what is recognised by individuals and how they sense of the world when in different settings (Darby et al., 2019:6).

4.1.2 Epistemology

Epistemology is concerned with knowledge, our understanding of what constitutes knowledge and how we access it (Saunders, 2009:128). Epistemological assumptions thus inform beliefs about how knowledge is generated, obtained and transmitted (Scotland, 2012:9). Darby et al. (2019:100) claim that epistemology is the "relationship between the knower and the known," which is founded in the ontological outlook.

In this context, the relationship refers to the researcher and the key players involved in the study, in that knowledge is built from insights provided by the participants and their context (Singh, 2019:5). Hiller (2016:103) adds that participants bring to bear their experience, while the researcher brought her own worldly beliefs and experiences. In this study, then, knowledge was co-created by the participant and the researcher through interactions with each other. The researcher's epistemic standpoint is not to generalise, but rather to see the world and the participants realistically in their respective positions. The knowledge created assisted the researcher to add flesh to the bare bones of systems theory and construct a practical model (Lai & Lin, 2017:3).

4.2 Research philosophies

Saunders et al. (2019:130) suggest that research philosophy is the “system of belief” that is developed while conducting research. Žukauskas, Vveinhardt and Andriukaitiene (2018:121) conceptualises research philosophy as a formal description of the researcher’s line of thinking. The main philosophies informing research are positivism, critical theory, pragmatism and interpretivism.

On the other hand, Kivunja and Kuyini (2017A:30) elucidate that the positivistic paradigm that a philosophical way of thinking identifies with positivism as how one views the world using a “scientific method of investigation”. The positivist assumption is that a single tangible world exists externally (Ye, Ollington & De Salas, 2016:121). Conversely, Wong (2014:16) expounds that the critical theory paradigm acknowledges that social reality evolves over time. The researcher’s duty was to be transformative and adapt to situations. Examples of critical theory studies include racial discrimination and studies conducted on human rights. Cersosimo (2019) explains that pragmatism is the relationship “between thought and action”. A pragmatic paradigm believes that there are ere single or multiple realities. A fundamental aspect of paradigm is that research should avoid supernatural debates about nature of truth and reality, instead, research should focus on real-life issues. The understanding is found on beliefs and practices that are socially constructed (Kaushik and Walsh, 2019:17).

For this study, an interpretative paradigm was adopted, for reasons that will be explained below.

4.2.1 Interpretivism

The interpretivism paradigm seeks to view the world subjectively. Alakwa (2017:41) claims that interpretivists give precedence to human choice and interaction within society. As a researcher, speaking to individuals allows one to gain an in-depth and realistic understanding by means of interpretation.

The researcher believes that the research problem can be solved through interaction with different people. Wong (2014:17) notes that such research intends to interpret the world through human interaction, hence the researcher adopted a social approach by choosing to conduct face-to-face interviews. The interpretive activity of the researcher therefore played a pivotal role in understanding the phenomenon.

The interpretative research paradigm also enabled the researcher to see how all the components, functions and parties within an organisation form part of a larger entity. Retailers are viewed as systems in which issues that seem unconnected can be incorporated in order to make insightful conclusions in broader contexts. Systems theory is a practical framework that permitted the researcher to use her own subjectivity logically (Porter & Córdoba, 2009:324).

To cite a couple of cognate studies: Poneis (2015) utilised this paradigm in a study relating to organisational technology, while Khan and Rahman (2015) used an interpretive approach to the analysis of brand experience in the retail environment.

The data collected should be interpreted and analysed with rigour (Ryan et al., 2016). Antwi and Kasim (2015:2019) note that the authenticity and prevention of bias in an interpretivist paradigm can be dealt with by carefully defining and explaining meanings and reasons for subjective decisions.

4.3 Research approaches

Cramer-Peterson et al. (2019:39) assert that reasoning is the core of any research design. Reasoning dictates a researcher's thoughts, arguments and conclusions. According to Mohojan (2018:3), a research approach is an action plan that provides direction for conducting research in a methodical and proficient manner.

4.3.1. Deductive, inductive and abductive reasoning

Woiceshyn and Daellenbach (2018:5) elucidate that research can rely on three types of reasoning, deductive, inductive or abductive. Deductive reasoning begins with a theory, devising a hypothesis and then collecting and analysing data to test the theory. Sauce and Matzel (2017:1) postulate that inductive reasoning, on the other hand, is when a researcher begins with observations, searches for patterns and then develops hypothesis and conclusions to bring fourth evidence. Inductive reasoning produces new knowledge which could lead to new conditions or circumstances (Lui et al., 2019:1). Finally, Ming-Yueh et al. (2019:33) posit that abduction is the process of searching and discovering new hypothesis about observations with reasoning to the best explanation. Mitchell (2018:105) agrees that an abductive approach takes insufficient or incomplete observations about a reality and draws the most sensible conclusion. Abduction resembles both the deductive and inductive approaches.

Considering that this study aimed to examine the critical success factors of e-tailers in South Africa, an inadequate body of research was at hand to conduct an inductive study. The researcher had to draw conclusions and discern relationships from the data. Inductive reasoning is a theory-building method which best explained the phenomena that are the subject of this study therefore resulted in the reasoning best suited to this type of study.

4.4 Research methods

Mishra and Alok (2017:1) posit that research methods comprise all the methods and techniques needed to undertake research. Mehrad and Zangenech (2019:1) describe how research is in fact shaped and conducted according to different individual attitudes. There is a tendency to separate research into two types, namely, quantitative and qualitative research.

Sharma (2018:4) explains that quantitative research is used to quantify behaviours, attitudes and opinions. Numerical data collection is converted into statistics and large results are generalised from sample populations. Tavakol and Sanders (2014:2) add that quantitative studies utilise numerical graphs and charts to conduct data analysis. The research is objective as in scientific studies and follows rigid guidelines and processes (Queirós et al., 2017:370). Unlike qualitative research, quantitative research uses cause and effect amid variables in order to confirm and substantiate theories or hypotheses (Haq, 2015:5).

The second type of research method is qualitative research, a method seeks to understand human values, cultures, experiences and circumstances (Kalu & Bwalya, 2017:44). Some common characteristics include minimising positivist assumptions, welcoming postmodernist insights, grasping the researcher's viewpoint and analysing daily hindrances all in order to obtain rich and in-depth descriptions (Harrison et al., 2017). Haq (2015:3) points out that this type of research is best suited to real-life situations and usually involve inductive analysis with an exploratory approach. Exploratory research is a method used to investigate problems that are not clearly defined. Nassaji (2015:129) defines descriptive research as describing a phenomenon its attributes. The overall aim is to build theory and work towards explanation.

This study adopted an exploratory qualitative research approach to collect and analyse the data. The researcher sought to provide in-depth explanations by analysing meanings in a subjective manner, in the quest to have avoided bias whereby academic rigor and research ethics were practiced and applied (Galdas, 2017:2).

4.5 Research strategy

Ponto (2015:168) and Aspers and Corte (2019:142) explain that the choice of a research strategy depends on the aim of the study, the accessibility of resources and the type of research questions posed. Qualitative research typically involves research in the field, which may include case studies, surveys, ethnography (in-depth study of social environments), focus groups, thematic analysis and interviews.

In this study, the data was deemed non-quantifiable and so quantitative strategies were eliminated. In-depth qualitative data was collected to support the case study research strategy.

4.6 Research design

A multiple case study research strategy was employed as the research question and objectives require an in-depth study of more than one organisation. In a study by Berssaneti, Berger, Saut, Vanalle and Santana (2019:9) to establish the value in remanufacturing products, a multi-case approach was adopted with interviews conducted at five third-party companies. Haag et al. (2019) utilised a similar research approach and philosophy, adopting a multiple case study approach to investigate three international Swedish retailers. The study explores the supply chain capabilities of the three retailers in a qualitative research design, with the research being mainly inductive and employing research-based theories (Haag et al., 2019:325). Nagy (2017) conducted a research study based on a multiple case study which included 4 organisations, involving 3 interviews with each organisation and the analysis of secondary data such as company reports. This study was about the critical success factors of international franchising. This study also comprised of 4 organisations and 3 interviews which was conducted at each organisation. Secondary data was analysed to gain more insight into the organisations background and history.

According to Stjelja (2013:3), a case study is a piece of empirical research based on real-life occurrence(s). Zainal (2007) adds that data is analysed within a specific context and case studies closely analyse situations, groups or phenomena. With a multiple case study approach, the information gathered allows data to be compared (Gustafsson, 2017:4). Data can be analysed within the case studies, between the cases and across cases (which is known as cross-case analysis). The reason for selecting a multiple case study is to identify the success factors of one organisation and compare them to the success factors of another (Yin, 2013:70). There are six sources typically consulted in a case study: documentation, archival records,

interviews, direct observation, participant observation, and physical artifacts (Yin, 2013:70). The researcher thus consulted online company reports and other documentation obtained from the companies, interviews, as well as participant observation that took place during the interviews. These sources are the most applicable to the study.

A key characteristic of case studies is that the approach pays attention to “how” and “why” questions (Baxter & Jack, 2008:545), which makes this kind of qualitative study most suitable for exploratory research. In sum, the multiple case study design allowed the researcher to delve into a phenomenon within its real-world setting (Ponelis, 2015).

Rashid¹, Rashid², Warraich, Sabir and Waseem (2019:2) outline the four phases to conduct a case study include the i) foundation phase which consists of philosophical consideration, consideration of inquiry techniques such as the research problem, understanding meanings and discovering patterns and research logic relating to inductive or deductive theory. ii) Prefield phase which requires the researcher to decide whether the case study is the most suitable choice and secondly the case study protocol that is a formal document with a step-by-step guide that is used to conduct the study. iii) The field phase consists of contact and the involvement of the researcher in the empirical material and secondly, the interaction of the empirical material and use of multiple sources in a case study is fundamental in adding rigour to the study. iv) The reporting phase involves reporting the case study and combines the participant descriptions, explains the relationships, addresses the interpretation of the strategy in relation to the findings and finally, generates themes and analysis based off the raw data.

4.6.1 Exploratory research

Strydom (2013:151) notes that exploratory research is concerned with “breaking new ground” by investigating problems hitherto not investigated. Kautish and Rai (2019) have demonstrated how to analyse the levels of satisfaction among customers using a fashion retailer’s online portals by conducting an exploratory study. Similarly, Yu and Kim (2019) analysed USA and Chinese online retailers’ return policies using an exploratory research design.

Exploratory research is open-ended: according to Dane (2011), one can determine that a particular phenomenon requires investigation, or even conduct research to ascertain whether a phenomenon exists or not. The findings may or may not culminate in an answer to the research questions. Sarantakos (2000:7) and Babbie (2013:91) suggest that ultimately, the end goal is to construct more definite research questions for future research. Van Wyk and Lange (2017:3)

adds that exploratory research is distinguished by a high level of flexibility and the main purpose is to identify factors that are most relevant to the research problem.

Exploratory research is often embarked upon when there are no or only a few comparable research studies one can refer to (Akhtar, 2016:73). In the case of this study, an exploratory design was appropriate since the researcher pursued insight into the research problem with a restricted amount of knowledge.

4.6.2 Interviews

Ryan et al. (2016) observes that interviews are a common form of data collection and frequently used as a “research strategy”. Alhassan et al. (2019:3) suggest that interviews are the most suitable form of data collection if one needs to gather rich circumstantial data from industry specialists. The researcher aligned the interview questions with the study’s objectives, guided in the construction of the questions by Ezeife (2017:4).

Hyman and Sierra (2016:3) claim that the advantage of open-ended questions is that they enable interviewees to broadly answer questions and the interviewer is able to ask follow-up questions during an interview. Open-ended questions can be used to clarify and investigate misconceived responses or deviant statements (Reja et al., 2003:160). Buowari (2015:78) conducted a doctoral case study with open-ended interview questions in relation to small business sustainability in Nigeria. Similarly, Yaseen, Dingley, Alhosban and Alhusban (2017) created an e-commerce model for traditional retailers in developing countries by using open-ended interview questions. By using open-ended questions, the authors were able to guide the participants toward examining e-commerce systems in depth. Based on the efficacy of the interview as a method of collecting data for a qualitative study, the researcher found that open-ended interview questions enabled her to extract the most relevant information and answers from all the participants.

4.6.2.1 Structured, semi-structured and unstructured interviews

Structured interviews are often compared to job interviews because of the direct nature of the questions asked (Alshenqeeti, 2014:40), while semi-structured interviews are in-depth interviews with planned questions (Jamshed, 2014:87). Adhabi and Anozie (2017:90) describe unstructured interviews as consisting of observations leading to the asking of informal questions.

The researcher selected a semi-structured interview method, which meant that fundamental pre-determined questions could be asked and the participants were free to respond openly. Additional or elaborated answers made a useful contribution to the study, so a semi-structured interview method was most appropriate. Since the critical success factors for apparel e-tailing in South Africa were unknown, it was imperative for the data collection instrument to remain pliable. Maseko, Van Wyk and Odendaal (2018) found that semi-structured interviews were most effective in their study on the critical success factors for team coaching in the workplace.

4.6.2.2 Open-ended questions

The study will utilise open-ended questions, with the same or similar questions being asked of all interviewees. This style of interviewing is efficient as well as simple to interpret and compare (Valenzuela & Shrivastava, 2008). The researcher selected this type of interview method because the probability of obtaining spontaneous responses was high.

4.6.2.3 Alternative data collection methods

In the wake of the Covid-19 pandemic, the researcher was obliged to incorporate additional data collection methods. As advised by her supervisor, in order to continue with the study and complete it on time, in-depth email surveys and telephonic interviews and surveys were employed over and above the initial face-to-face interviews. Adhabi and Anozie (2017:91) note that telephone and email interviews are equally significant and capable of achieving the same purpose as face-to-face interviews in qualitative data collection.

4.6.2.4 In-depth email interviews

Fritz and Vandermause (2018:1641) explain that email interviewing became a data collection technique as a consequence of technology. Due to the novel coronavirus outbreak, known as Covid-19, a 36-day lockdown was declared and South Africa went into a level 5 lockdown as of 26th March 2020 (Dukhi, Mokhele, Parker, Ramlagan, Gaida, Mabaso, Sewpaul, Jooste, Naidoo, Parker, Moshabela, Zuma, Reddy, 2021:46). As a result, electronic technology became the main point of communication replacing the initial face-to-face interviews.

Fritz and Vandermause (2018:1642) count among the advantages of email interviews the fact that no travelling is required. Travel and time costs are reduced, and emails allow for sample diversity, especially for busy individuals who work according to schedules. Hawkins (2018:495)

cites Gibson (2010) to the effect that another advantage of email interviews is that responses are already in written form, saving the often considerable time that transcription takes.

4.6.2.5 Telephonic interviews

The researcher conducted one telephone interview. This method of data collection was preferred because the participant had a busy schedule. Telephone interviews are a valuable alternative to face-to-face interviews (Barzilay, 2019:9). Telephone interviews offer reduced costs/time and faster data delivery. Conversely, the duration of interviews has the potential to be shorter than that of face-to-face interviews (Farooq, 2015:6).

4.7 Time horizons

The time horizon is the time frame that a researcher allocates for the investigation of the research problem (Sahay, 2016). An investigation can be undertaken at a particular point in time or over a long period of time.

4.7.1 Cross-sectional studies

Zheng (2015:66) explains that a cross-sectional study tackles the research problem by investigating a specific population at a given point in time. In reality, one collects data on a small portion of the population. The aim of a cross-sectional study is to acquire dependable data in order to produce up-to-the-minute conclusions (Echeimerg, Zangirolami-Raimundo & Leone, 2018).

Carried out at a particular point in time, cross-sectional studies are obviously quicker to conduct than longitudinal studies. Either can be used in case study research, but the purpose of this research made a cross-sectional study appropriate. The researcher planned to interview each participant over a period of weeks, once the interviews were complete, the data was analysed and compared to literature and the relevant theory in order to compile this research study.

4.8 Sampling consideration

Carpenter (2017:2) regards sampling as first step in any research process, systematically identifying where the study will take place, the population chosen for the study and the number of selected participants. Sampling is the process of selecting sampling units from a sampling frame or population (Martinez-Mesa et al., 2016:327). A sampling plan should stipulate the

sampling method and the sample design is the plan and procedure that is followed in selecting the sample from the target population and the assessment method for calculating the sample (Kabir, 2016:170).

4.8.1 Probability and Non-probability sampling

Kumar (2019:299) notes that sampling can be performed in one of two conventional ways, namely, probability or random sampling and non-probability or non-random sampling. Naderifar et al. (2017:2) note that probability sampling entails that each sample has the opportunity of being selected whereas non-probability sampling involves the researcher's choosing the samples, so not all units in the population have an equal chance for being selected.

Probability sampling is a technique for objective accuracy, reducing the chances of error and sampling biases (Datta, 2018:1). Non-probability sampling is subjective in nature and suited to the kind of data sought in an interpretive study. It is the type of sampling most appropriate for exploratory studies of complex phenomena (Datta, 2018:2).

4.8.2 Sampling methods

There are various types of sampling methods. For instance, Rahi (2017:3) explains that probability sampling includes simple random which is defined as the process whereby each sample in the population has an equal chance. Systematic random are samples that are chosen at random and stratified random are each subgroup also known as 'strata' that has an equal chance, (Datta, 2018:3). These methods are more suited to quantitative research studies.

On the other hand, non-probability sampling ranges from quota sampling to convenience sampling, snowball sampling and consecutive sampling (Martinez-Mesa, 2016:327). Vehovar et al. (2016) and Taherdoost (2016:23) describe purposive sampling as a strategy that is intentionally aimed at selecting specific participants or settings. This is the sampling method chosen for this study, as explained below.

4.8.2.1 Purposive sampling

From a review of the various types of sampling method, it was concluded that non-probability, purposive sampling was most appropriate for the study. Palys (2012:2) states that purposive sampling expresses one's choices of how, with whom and where one decides to conduct

research. In a nutshell, the researcher was aware of what needed to be known and selected individuals who seemed to be best placed to provide it.

In this study, the researcher purposively sampled individuals who worked for the four e-tailers and who therefore had first-hand knowledge of e-tailing and their organisation's strategies. The sampled employees comprise individuals in management positions, specifically in marketing and buying departments. The individuals were in management positions, consist of both male and female and were between the ages of 35-52 years old. Yazan (2015:149) notes that the researcher essentially determines the final dimensions of the case study by choosing respondents to interview, the researcher was mindful and intentional when selecting which participants to interview. This study therefore explores four organisations through interviews with three individuals at each organisation, furthermore Saunders et al. (2017:1900) define saturation as the point at which further data collection becomes ineffective. Weller et al. (2018:3) note that the point of saturation can occur in interviews, even those employing open-ended questions. In this study, saturation was recognised when no new data/details were generated by the subjects (Maseko et al., 2018:3).

This further substantiates the study that Corbitt, Coulthard and Boon (2005:799) carried out, which is a qualitative single case study on critical success factors, but linked it to customer relation management. Twelve interviews were deemed sufficient in that study to identify critical success factors. The example of this study reinforces the researcher's sampling method and methodological choices.

4.9 Ethical considerations

Ramrathan et al. (2016:433) define ethics as the morality associated with human conduct. For researchers, ethics includes an awareness of and respect for the rights and feelings of other beings. In this study, the researcher treated all participants with respect, ensuring that their rights were made clear. No participant was forced into participating in the study, and no minors were included. Permission to conduct the study was sought from one of the three participants at each of the e-tailers prior to conducting the interviews, and the ethical clearance certificate is included in the appendices as appendix C and a few key terms and concepts are explicated below.

4.9.1 Informed consent

Hussain et al. (2018) claim that robust informed consent is the groundwork for research to be ethically conducted. A participant must voluntarily authenticate his/her inclination to proceed (Yip et al., 2016:685). A printed participant sheet should be provided by the researcher containing the date, the printed agreement in writing and place for the participant to sign (Roache, 2016:435). Moreover, the face-to-face interviews were conducted before the Covid-19 pandemic occurred therefore observing Covid-19 protocols were not necessary.

A written informed consent letter was handed or sent to each participant, affirming their rights, explaining the aim of the study and the process in which they would take part, as well as the risks that might be incurred. The participant had the freedom to sign the consent form or not, thus agreeing or declining to participate. The consent form is included in the appendices as appendix A. The researcher reminded participants that although they signed the consent form, they are able to withdraw from the study at any point.

4.9.2 Anonymity

According to Sagepub (2011), preserving anonymity means accumulating data without acquiring personal information that can be identified with the participant. The researcher did not request any personal information from participants besides their name, job title and the company they worked for. Those who did not feel comfortable providing that information had the option of remaining anonymous. Throughout the interviews, the participants names were not mentioned during the recording of the face-to-face interviews.

4.9.3 Confidentiality

Confidentiality pertains to an agreement between the researcher and participants, stipulating how information will be managed. All participants' personal information and the views they express in a study remain concealed from the public, with the researcher being the only individual with primary access to it (Saunders & Kitzinger, 2015:617). As was the case with anonymity, participants' identity remained anonymous and was assured before the start and the end of the interviews that all details and data would remain confidential.

4.9.4 Voluntary withdrawal

Melham et al. (2014) note that the concept of voluntary withdrawal is another form of protection for participants involved in research. At any point in the process, any participant has the right to back out. During interviews, participants have the right to answer or decline to answer certain questions (Arifin, 2018). The participants in this study were informed that they had the right to withdraw from the interview at any given point (Xu et al., 2020:2).

4.9.5 Plagiarism

According to Helgesson and Eriksson (2014:1), plagiarism is “someone using someone else’s intellectual product, thereby implying that it is their own”. This could be unreferenced texts, methods, ideas, results or any information utilised with the intent of crediting oneself and thereby misleading the reader (Abud-García, 2018). The researcher has assiduously avoided plagiarism since she believes that new insights depend upon acknowledging and properly referencing all sources consulted. The Turnitin plagiarism software tool was used to check the originality and integrity of the study.

4.10 Key role players

Key or industry role players (Poggenpoel, 2020) include individuals who contribute to the value chain in an industry. To thus add value, these individuals need specific skills and capacities. The development of CSFs requires the involvement of an organisation's senior employees or management system (Frączkiewicz-Wronka et al., 2012:233). The key role players in buying and marketing are further discussed below.

According to Rana and Zhao (2018:1), fashion buyers play a vital role in the growth and success of a retailer/brand. A retailer's fashion buyers contribute towards the marketing mix and may be seen as value-creating resources. Fashion buyers have had to adapt to market changes including the movement of retailers to omnichannel business models (Lidholm et al., 2017:2036). Thus, according to Nobbs et al. (2014:3), in recent years the role and skills of fashion buyers have changed, especially in the way styles are bought specifically for the online store versus physical store. Additionally, fashion buyers rely heavily on social media and trend forecast websites to help them gain a clear understanding of current directions in apparel e-tailing.

On the other hand, marketing managers ultimately control the content on a retailer's online store website and the social media (Forrest, 2019:408). Marketing has many significant benefits but the main function of marketers as key role players is to attract new customers and increase site traffic.

4.11 Data analysis

Archer (2018:2) observes that the analysis of qualitative data involves pointing out common themes or patterns in the data collected. Turning raw qualitative data into communicative qualitative data relies on using the important tool called coding. Coding summaries data and improves the quality of the findings and analysis (Linneberg & Korsgaard, 2019:3). Coding the data from the interviews required reporting, interpreting and analysing relevant data generated from the transcripts. Identifying key themes and conceptualising ideas enabled the researcher to determine correlations that established the data set (Herzog et al., 2019:3). Gunawan (2015:11) expounds that measures to validity and trustworthiness in qualitative research relies on member checking, returning to the participants data to ensure rigor. In this study, data analysis computer software was used to tabulate the data systematically and code the data. The researcher applied the member checking technique throughout the data analysis process.

4.12 Data analysis process using Atlas.ti

Once the data collection process was complete, the voice-recorded interviews were transcribed. With the help of Atlas.ti software, the data was stored and analysed in an organised manner, allowing the researcher to maintain rigour (Verma, 2016:56).

Atlas.ti is a non-numeric qualitative data analysis software (QDAS) program that analyses the data according to the requirements loaded onto the software by the user (Frieze, 2019a). Atlas.ti 8 was used for this study, to analyse the data in a structured format, identifying patterns and relationships and generating codes based on the data collected from the participants (Frieze, 2019b).

Important quotations were distinguished in line with the themes and then turned into codes. According to Atlas.ti (2018:15), codes categorise large amounts of data creating small pieces of important text, audio or graphical data. To pinpoint the different types of codes, "code groups" were created to draw connections among elements of the data.

Bengtsson (2016:10) notes that content analysis is a qualitative data analysis method used for any written text. The method is effective and has no particular rules for implementation, hence open-ended questions lend themselves to content analysis. Schreier (2014) attests to the suitability of the method for inductive studies, and notes that content analysis describes qualitative data in a methodical way. The researcher utilised the ATLAS.TI tool to ensure that the qualitative data was analysed with rigour (Verma, 2016:56).

The motivation for data analysis in a case study research strategy is to adumbrate tendencies, patterns and theories in a real life context and, by means of inductive reasoning, create new knowledge (Ridder, 2017:2).

4.13 Delimitation

Bak (2015:21) explains that delimiting a study consists of identifying what falls within its purview and what does not. The following delimitations have been determined for this study:

Delimitation of subject area: the study will investigate apparel e-tailers, with a specific focus on identifying the organisations' critical success factors. The study will centre on these unique factors that enable the business to remain profitable. The study will not explore key performance indicators but rather the critical success factors which are the root cause of profitability for the organisations under study.

Methodological delimitation: The study adopts an interpretative, multiple case study design. Its findings and recommendations will be rigorously scrutinised but will of necessity remain to a certain extent subjective.

Geographical delimitation: The focus of this study is on e-commerce and clothing retailers based in South Africa but prominently trading in the Western Cape. The researcher is based in the Western Cape and will therefore have easy access to the respondents.

4.14 Limitations

Limitations in research amount to an acknowledgement of problems, hindrances or restrictions recognised or encountered by the researcher.

The first limitation of this study is that it is limited to only four organisations and the sample size is limited to three interviews per organisation. Consequently, the generalisability of the results

may be limited. The researcher does however believe that she has selected the most relevant cases to provide the data required for the study.

Although the purpose of a qualitative study is to obtain in-depth data from smaller samples, including more retailers and gaining a broader perspective would presumably have added value to the study. The researcher thus acknowledges the sample size as a possible limitation, but has mitigated this by ensuring that the most suitable participants take part in the study.

CHAPTER 5: DATA ANALYSIS AND PRESENTATION OF FINDINGS

The principal objective of the research was to identify the CSFs that are responsible for the success of established apparel e-tailers. The research focused on pursuing three objectives: how do CSFs help the business, what challenges are experienced, and what strategies can be implemented to combat these challenges. The final goal was to develop a growth and development framework for apparel e-tailers that can be utilised by all e-tailers as well as e-tailers potentially entering the market.

The previous chapter explained the research method and design utilised in the study. This chapter presents and discusses the findings from the interviews conducted, and analyses and interprets this data in line with the objectives of the study. Presentation of the responses from the participants will be structured in such a way as to answer all three objectives. This will be done by identifying the most relevant and recurring themes and theories.

As mentioned in Chapter Four, after purposive sampling, open-ended interviews were conducted and the data was collected by means of a voice recorder and via email.

5.1 Data collection process

The data collection process consisted of a total of twelve interviews, three at each of four companies. Two companies are pure-play apparel online retailers and the other two are hybrid apparel retailers.

The researcher developed in-depth interview questions and all participants were asked the same questions. The interview questions were formulated according to the research objectives. Full details of the sample group are presented in Table 2, below:

Table 2: Information about the sample group (author's own compilation)

Participant Number	Type of Retailer	Position of Participant	Company Location
Participant 1	Pure-play Apparel E-tailer	Buying Manager	Western Cape
Participant 2	Pure-play Apparel E-tailer	Buying Manager	Western Cape
Participant 3	Pure-play Apparel E-tailer	Buying Manager	Western Cape
Participant 4	Pure-play Apparel E-tailer	Buying Manager	Western Cape
Participant 5	Pure-play Apparel E-tailer	Head of Buying	Western Cape
Participant 6	Pure-play Apparel E-tailer	Buying Manager	Western Cape
Participant 7	Hybrid Apparel E-tailer	Marketing Manager	Western Cape
Participant 8	Hybrid Apparel E-tailer	Buying Manager	Western Cape
Participant 9	Hybrid Apparel E-tailer	Buying Manager	Western Cape
Participant 10	Hybrid Apparel E-tailer	Buying Manager	Western Cape

Participant 11	Hybrid Apparel E-tailer	Buying Manager	Western Cape
Participant 12	Hybrid Apparel E-tailer	Head of Marketing	Western Cape

In all, six code groups and twenty-two codes were determined, as depicted in Figure 5.1, below.

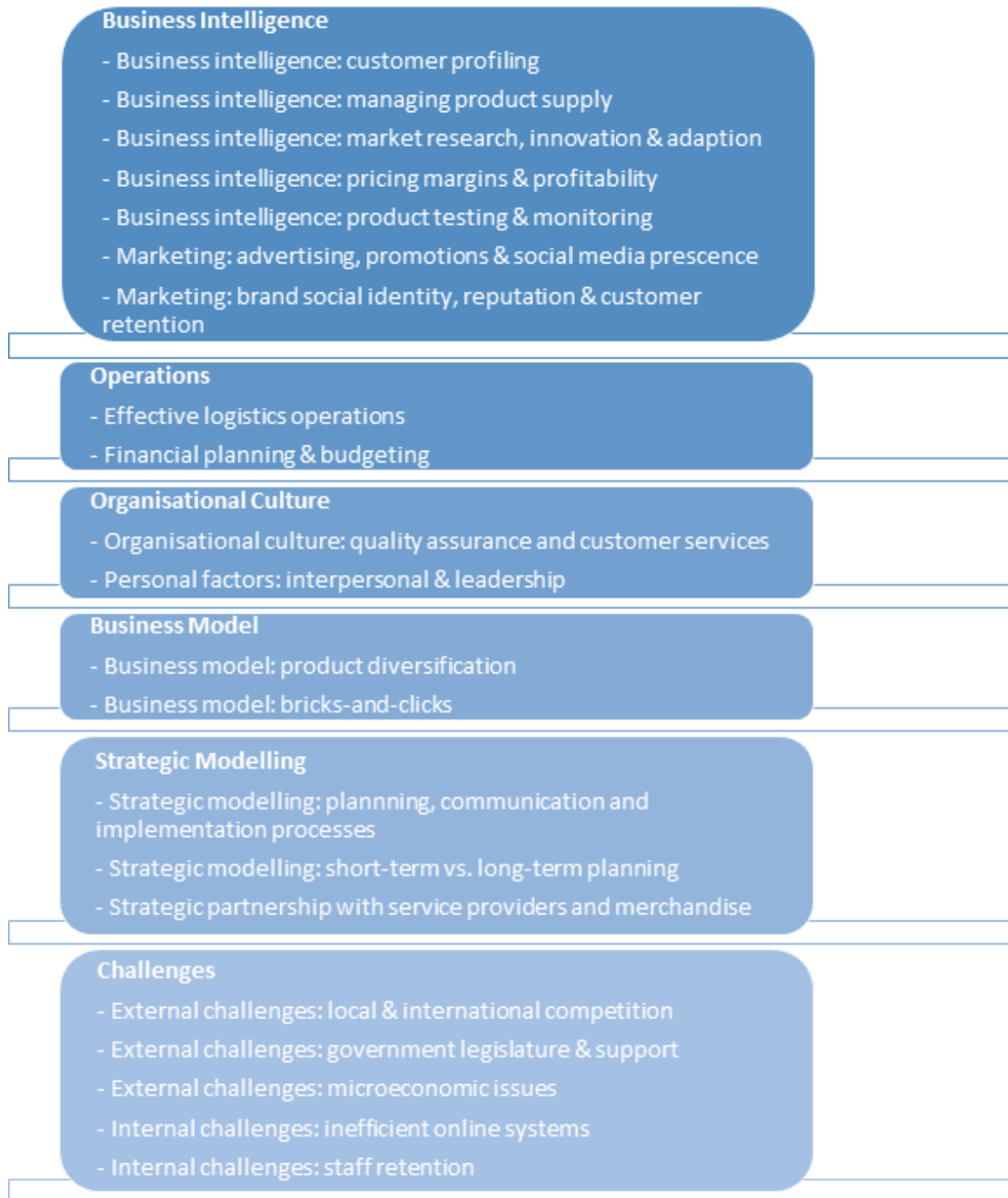


Figure 5.1: Codes and code groups

Source: author's own compilation

5.2 Findings of this research study

This section will discuss the findings of the study by analysing the interviews pursuant to the three research objectives. These are presented in the form of the codes and code groups, beginning with objective one.

5.2.1. Objective 1: To identify the CSFs of leading apparel e-tailers in South Africa.

Objective one was the focal point of the study, and CSFs emerged from five out of the six code groups in the analysis. Figure 5.2 provides an outline of the CSFs and the order in which they are discussed.

Critical Success Factor 1 – Business Intelligence	
• Business Intelligence:	Customer Profiling
• Business Intelligence:	Managing Product Supply/Demand/Timing
• Business Intelligence:	Market Research, Innovation and Adaption
• Business Intelligence:	Pricing Margin and Profitability
• Business Intelligence:	Product Testing and Monitoring
• Marketing:	Advertising, Promotions and social media presence
• Marketing:	Brand Social Identity, Reputation and Customer Retention
Critical Success Factor 2 – Operations	
• Effective Logistics Operations	
• Financial Planning and Budgeting	
Critical Success Factor 3 – Organisational Culture	
• Organisational Culture:	Quality Assurance and Customer Services
• Personal Factors:	Interpersonal and Leadership
Critical Success Factor 4 – Business Model	
• Business Model:	Product Diversification
• Business Model:	Bricks-and-clicks
Critical Success Factor 5 – Strategic Modelling	
• Strategic Modelling:	Planning, Communication and Implementation
• Strategic Modelling:	Short-term vs. Long-term planning
• Strategic Partnership with Service Providers and Merchandise	

Figure 5.2: CSFs identified by the e-tailers

Code Group One: Business Intelligence

Code group one examines the set of processes and tools used by the business to capture the data needed. Figure 5.3, below, illustrates seven different codes. To begin with, code one explored the importance of customer profiling and is a property of code three, which is concerned with market research, innovation and adaptation. Code two enquired into the importance of managing product supply, demand and timing, which is a property of code five, product testing and monitoring. Code four captured pricing margins and profitability, which is associated with code five, product testing and monitoring. Lastly, code six is directly related to marketing: advertising, promotions and social media presence are all associated with brand social identity, reputation and customer retention.

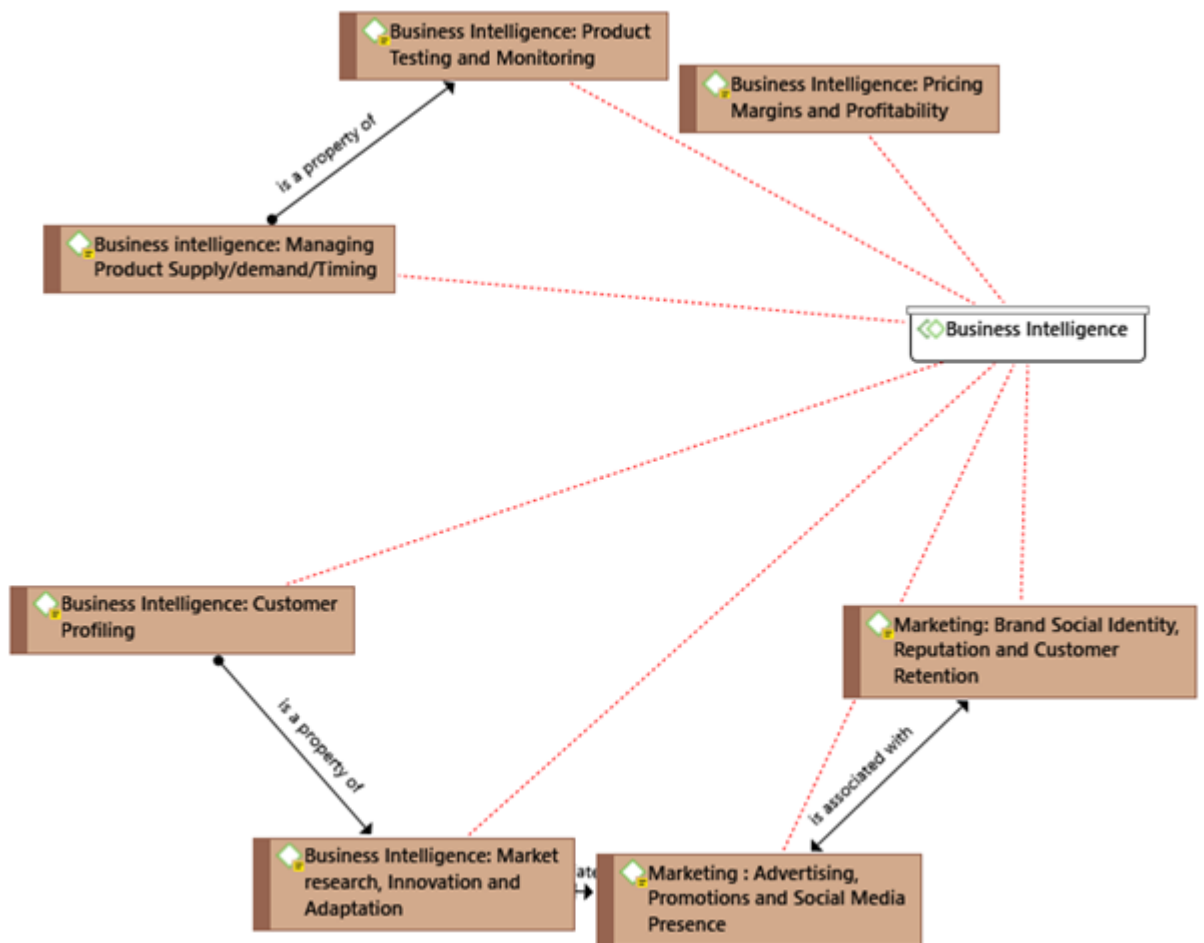


Figure 5.3: Code Group 1

Code 1: Customer profiling

One of the strategies used by successful retail companies is the business intelligence associated with profiling customers. When venturing into a business, it is important to have clarity on the target market for the business. Customer profiling includes understanding who the clients are, where they live and their age(s). The demographics of clients who purchase certain products can be used to improve sales. Sales can also be improved by profiling the consumers' behaviour more generally. Hassan and Tabasum (2020:25) conclude that the purpose of customer profiling is to understand particular customer groups, so as to serve the customers better and devise pertinent strategies for doing so. Retailers who do so place the customer at the centre of all decisions and processes. In the remarks below, the respondents reveal how and when the customer is taken into consideration:

1:1 Some of those critical success areas are generally for all retail or most of retail. It's having the right product, at the right time (611:954) - D 1: Company 1-PP1

Some of those critical success areas are generally for all retail or most of retail. It's having the right product, at the right time, at the right price. Those three as simple as they are, it's complex in a way that a lot of forward planning has to be done to get the product in at the right time and in the right place and at the right season.

1:6 Yes, our model is based on having 3 customers at the moment. The junior (3049:3319) - D 1: Company 1-PP1

Yes, our model is based on having three customers at the moment. The junior guy who will buy into Cotton On, quick easy fast fashion. Then your contemporary customer who likes cleaner subtle styles, more mature. And your smart guy, the working guy who buys more formal items.

1:15 Everyone is aspirational in that sense in fashion, but being realisti (7247:7386) - D 1: Company 1-PP1

Everyone is aspirational in that sense in fashion, but being realistic about how many people can afford it looking at your LSM is always key.

1:29 we can be on a path for three months and we see how customer shifting (13244:13447) - D 1: Company 1-PP1

we can be on a path for three months and we see how customers are shifting and we will need to shift with our customer we can't just let them go that way. We got to retain that customer and grow new customers.

1:31 An existing customer knows the processes, knows the expectations so it' (13657:13991) - D 1: Company 1-PP1

An existing customer knows the processes, knows the expectations so it's much easier to keep that customer and just show him the product he wants to see, so doing surveys are very important or working with WGSN and just getting to know what kind of product and customer you have, because one thing we forget is that the customers grows.

1:37 We need to keep reinventing ourselves and pushing boundaries but at the (16163:16509) - D 1: Company 1-PP1

We need to keep reinventing ourselves and pushing boundaries but at the same time give people a fair price in the market. That's very crucial for me, there has to be integrity in what we do in that sense that the customer is getting the best possible deal and we not ripping them off and they buying high-quality goods at the best possible price.

2:16 Yes it is department specific. Because you would break it down to see (7285:8082) - D 2: Company 1-PP2

Yes, it is department specific. Because you would break it down to see. Did you do a SWOT after every season and you see where were the opportunities, where were the strengths, where are the threats and you do a full SWOT. Based on that SWOT you see how does it feed into the main strategy. If the main strategy is to attract a younger customer, then it's about understanding what were the opportunities and weaknesses in those brands that was supposed to be appealing to her and then how do you shift and change from there or is it understanding that the customer now has children and she owns her own home. She's no longer a student with an apartment, you would then focus on your homeware offering and kids wear offering, so that's how each department will feed into the main top-line strategy.

4:10 It is probably the most critical when it comes to e-commerce. The great t (4167:4584)
- D 4: Company 2-PP1

It is probably the most critical when it comes to e-commerce. The great thing with e-commerce is that you able to get a lot of stats and you're able to get a lot of information about who your consumer is. So we have that visibility of which province our consumer shops in, what is the age group, the gender. That kind of information so we able to use this information to obviously try and provide the best customer service.

4:14 That's why when you look at a business-like company too you get the purchasing (5771:6129) - D 4: Company 2-PP1

That's why when you look at a business like company 2 you get the purchasing division, then the marketing and be it business intelligence and I.T, they all just as big as you know in a bricks business you'll have the merchandise division which is the biggest division and then the others are support whereas in e-commerce they all just as important as each other.

5:3 understanding what products you should be putting on the website (1810:1874) - D 5: Company 2-PP2

Understanding what products you should be putting on the website.

5:41 So our age profile is from 30, let's start off and see how we go and (15331:15552) - D 5: Company 2-PP2

So our age profile is from 30, let's start off and see how we go and after the first few months of sales I get the supplier in. I take them through dynamic reports and show them what the ages were and the ages start at 25.

5:42 The view of brands has changed of how important e-tailing is and it do (15793:16316) - D 5: Company 2-PP2

The view of brands has changed of how important e-tailing is and it doesn't compete with brick n mortar but it gives them a new angle, it's a new flagship store for them so that's been interesting. For brands learning that they not just one set profile and for us knowing that we can have a Queens Park to an Adidas to a Sissy Boy. You have

different people there all in one and your sizing is always changing, you can never be set because one size of a Sissy Boy jean to a Levi's jean is different customers the whole time.

6:3 I'm not sure if this is a success factor but in terms of profitability (1089:1505) - D 6: Company 2-PP3

I'm not sure if this is a success factor but in terms of profitability, that's definitely our biggest focus and everything that we do centres around that and that goes back to buying the right stock with the right price, having it at the right time and also having an understanding of where we sit on the market, who is our customer and who do we want to be which for us is building an online fashion mall.

6:5 They obviously critical ones, they ensure that we follow a consistent st (1907:2232) - D 6: Company 2-PP3

They obviously critical ones, they ensure that we follow a consistent strategy, that we don't lose sight of what is the most important which is to build and retain our customer base whilst remaining profitable. At all times that we understand what our market position is but under there everything comes back to profitability.

6:14 Or if we adding a little more to the customer so that the product has l (5221:5677) - D 6: Company 2-PP3

Or if we adding a little more to the customer so that the product has longevity or we focus on our brands that we know customers will buy into regardless the big sport brands. So it's just protecting and maintaining the value proposition, being extremely critical of products and brands that we do bring in and keeping it simple and focusing on what is going to actually drive profitability for us. There is no room for extra product or anything like that.

8:26 Retailers need to ensure they are clear on who their target markets are (5774:5872) - D 8: Company 3-PO2

Retailers need to ensure they are clear on who their target markets are when communicating online.

11:9 Ensuring that we are clear on who our customer is & strategy in order (2359:2445) -
D 11: Company 4-PO2

Ensuring that we are clear on who our customer is & strategy in order for us to execute

9:7 In turn when opening up accounts, the business is able to gather the a (2558:2809) -
D 9: Company 3-PO3

In turn when opening up accounts, the business is able to gather the analytical data required to create who the ideal TS consumer is and what these consumers are looking for. This allows a business to remain competitive and relevant to the consumer.

It was found that consumer information is collected when consumers open accounts, subscribe or sign up online or to newsletters. The way in which the data is collected and managed determines how well the business can attract and track the correct target groups. Accurate information is collected by monitoring customers purchasing behaviour. There are many different types of customer profiles ranging from various age groups and in order to know how to target these consumers, they are required to shift with market trends. Conducting market and trend research including market statistics enables the e-tailers to remain up to date.

Code 2: Managing product supply/demand/timing

A CSF that ensures the success of retailers is the balance between product supply and demand. If the relationship between supply and demand is balanced – an achievement also known as ‘demand management’ – then sales are optimised and supply chains perform more efficiently (Basson et al., 2019:1). The findings highlighted that businesses are cautious about what they introduce into the market. Timing is also important since certain products tend to sell in specific seasons and on specific dates. This finding substantiates Teucke et al.’s (2014:2) observation that clothing retailers’ critical paths are distinguished by seasonal cycles and set dates for orders and delivery. One of the factors for success is being proactive in terms of orders and production. Companies have to ensure that stock is available on time and that production is synchronised with market demand. This approach ensures that customers get what they require at the right time, as seen in the excerpts reproduced below:

1:1 Some of those critical success areas is generally for all retail or mo (611:954) - D 1:
Company 1-PP1

Some of those critical success areas are generally for all retail or most of retail. It's having the right product, at the right time, at the right price. Those three as simple as they are, it's complex in a way that a lot of forward planning has to be done to get the product in at the right time and in the right place and at the right season.

1:3 Also a very important part or that's a critical to our success is as I (1724:1947) - D 1:
Company 1-PP1

Also a very important part or that's a critical to our success is as I was saying, having the right product. A t-shirt is a right product, a jean is a right product, a shirt is the right product but having the right product

1:16 All the time. All the time. That's one of our biggest things is, every (7495:7925) - D 1:
Company 1-PP1

All the time. All the time. That's one of our biggest things is, every week we got to reinvent ourselves. Every day we have to. There's no use getting stock in and just say hey it's just going to keep going. No it's the same for trends. Trends change all the time. Three months from now it could be something else, you never know. We need to be open and keep reinventing ourselves, even just watching people and picking up trends.

2:16 Yes it is department specific. Because you would break it down to see. (7285:8082) -
D 2: Company 1-PP2

Yes it is department specific. Because you would break it down to see. Did you do a SWOT after every season and you see where were the opportunities, where were the strengths, where are the threats and you do a full SWOT. Based on that SWOT you see how does it feed into the main strategy. If the main strategy is to attract a younger customer, then it's about understanding what were the opportunities and weaknesses in those brands that was supposed to be appealing to her and then how do you shift and change from there or is it understanding that the customer now has children and she owns her own home. She's no longer a student with an apartment, you would

then focus on your homeware offering and kids wear offering so that's how each department will feed into the main top-line strategy.

3:14 Carvela is sold at Spitz, people starve to save enough money to buy th (4703:5083) - D 3: Company 1-PP3

Carvela is sold at Spitz, people starve to save enough money to buy those shoes. The shoes are R3000 so mostly people in poor communities buy those shoes. They save for months and they lay-by it. They have to have it so, if people are willing to go hungry for shoes that means there's something about those shoes that makes the customer want to have it regardless of the consequences.

4:26 We not sitting with thousands of units if it doesn't sell it doesn't s (11314:11841) - D 4: Company 2-PP1

We not sitting with thousands of units if it doesn't sell it doesn't sit in our warehouse it sits in their warehouse. So the customer makes a sale, she doesn't really know. That sale goes through to that supplier portal, they pick it, they pack it and send it to our warehouse. We then package it in a company 2 box and it goes to her. It's a very good business plan to have because we not investing all this money but that's one side of the business. The other very big side of the business is what we refer to as the retail side.

5:3 understanding what products you should be putting on the website (1810:1874) - D 5: Company 2-PP2

understanding what products you should be putting on the website

5:24 We strategies set in the whole time. We've got white boards in every s(7838:8052) - D 5: Company 2-PP2

We have strategies that are set in place the whole time. We've got white boards in every single office. We are deep-diving we call it into everything so whether it's a bad selling product you coming up with a plan of how to sell the stock.

6:2 also that our product assortment consists of the relevant brands that (884:1088) - D 6: Company 2-PP3

also that our product assortment consists of the relevant brands that we have the brands that we know our customers are always searching for and love but also bring in enough new brands into the business.

6:27 If the products right at the right price point then I think we good to (10923:11176) - D
6: Company 2-PP3

If the product is right and it's at the right price point, then I think we good to go. It just means controlling your stock and you buy very tightly but it is very difficult when your competitors do such aggressive promotions on stock that we necessarily wouldn't.

7:2 Also just customer facing meaning having the right product, at the rig (783:1653) - D
7: Company 3-PO1

Also just customer facing meaning having the right product, at the right time sending out the right communications at the right time and just being relevant at the right time and that's obviously having the right marketing mix that helps all those channels succeed. Your marketing mix, when we speak about online having the right product, having the right marketing communications, being relevant to the customer at the right time, at the right place and obviously those channels are quite important and as an e-commerce business you have to make sure all those channels are explored from a digital perspective. When you talk about social media what the strategy for that looks like when we talk about paid media, what that strategy looks like. When we talk about launches, what that looks like. I'd say the marketing mix and all those channels that you have to exploit.

7:3 For us, I would say as company three's group company and as a retailer that, these help the busi (1724:2045) - D 7: Company 3-PO1

For us, I would say as company 3's group company and as a retailer, these help the business to make money. We basically exploit all these channels to make sales and basically a return on investment because you do put money in making all these strategic elements happen so it's basically value for money and getting a return on investment.

7:11 So they not able to send the product or the product arrives late so we (5500:5775) - D 7: Company 3-PO1

So they not able to send the product or the product arrives late so we are not relevant with the rest of the market so for example Adidas launches their pure boost and we not launching. We not relevant with the rest of the market so in turn that's definitely hindering sales.

8:5 It ensures the business to win market share and to be the first to have (968:1143) - D
8: Company 3-PO2

It ensures the business wins market share and to be the first to have certain product types. That way customers will come to us first as we have the latest products to offer.

8:19 To ensure our key supplier partners are set up to do quick response to(3541:3636) -
D 8: Company 3-PO2

To ensure our key supplier partners are set up to do quick response to get goods online faster.

9:12 There are products that are purely considered core/ always online because those products (3559:3835) - D 9: Company 3-PO3

There are products that are purely considered core/always online because those products that are there to drive basket spend and products that are there to create an online frenzy. These campaigns and launches need to be aligned at the forefront of the season to create seamless launches online.

12:1 Right product (469:482) - D 12: Company 4-PO3

Right product

12:3 Right time (496:506) - D 12: Company 4-PO3

Right time

12:6 Timing: timing of product releases is key – too soon, and you cash sit (855:1012) - D
12: Company 4-PO3

Timing: timing of product releases is key – too soon, and your cash sits in stock longer than necessary, too late and you miss the customer buying opportunity

As mentioned above, these three ingredients – the correct product, price and timing – enable the business to compete in the market. To remain prominent entails having efficient support channels and departments that feed into getting the product onto the market ready for purchase.

Code 3: Market research, innovation and adaptation

One of the CSFs of business intelligence is conducting research on market demands. It is imperative for apparel retailers to understand, even forecast, what items are or will be trending. The fashion industry comprises a constant series of fashion trends (Gazzola et al., 2020:2). The retailer should try to understand consumer behaviour so that consumer demand can be met timeously.

Another aspect to consider is the innovation which is required to sustain the originality of the brand, constantly “reinventing oneself” and anticipating or creating trends. The business environment itself is constantly changing, and the company must learn to adapt to this changing environment:

1:16 All the time. All the time. That's one of our biggest things is, every (7495:7925) - D 1: Company 1-PP1

All the time. All the time. That's one of our biggest things is, every week we got to reinvent ourselves. Every day we have to. There's no use getting stock in and just say hey it's just going to keep going. No it's the same for trends. Trends change all the time. Three months from now it could be something else, you never know. We need to be open and keep reinventing ourselves, even just watching people and picking up trends.

1:31 existing customer knows the processes, knows the expectations so it' (13657:13991) - D 1: Company 1-PP1

existing customer knows the processes, knows the expectations so it's much easier to keep that customer and just show him the product he wants to see so doing surveys are very important or working with WGSN and just getting to know what kind

of product and customer you have because one thing we forget is that the customers grows.

2:15 I think 100% in today's day and age that is the case. You have to cons (6654:7174) - D 2: Company 1-PP2

I think 100% in today's day and age that is the case. You have to constantly be moving with the times and be moveable and flexible and look at what's going on around you. And also it is less, a few years ago in this industry we could basically do what whatever you wanted as a retailer and the customer would respond to it and but I think it's changed now and you really have to understand what she needs and where she's at, instead of talking to her in terms of listening observing and giving her what she needs.

3:8 We've got designers in house, we've got developers in house, we have deve (2581:2830) - D 3: Company 1-PP3

We've got designers in house, we've got developers in house, we have developers that specialise in Android, the I phones and then desktop. So they all in house here so whatever developments that need to be done can be done in house and done speedily.

3:20 When the future comes you don't know what is going to happen, you prep (7675:8130) - D 3: Company 1-PP3

When the future comes you don't know what is going to happen, you prepare as much as you want but it hits you by surprise so company's permanent motto is we are on permanent beta so we never ever relax, we always on the lookout for new ideas we always looking out for fresh things so we never get to a point where we say we have arrived. We never arrive, we constantly growing and learning and implementing new things so that is our not so secret strategy.

3:21 Yes, we can never get to a point where we say we the trend setters, yo (8211:8495) - D 3: Company 1-PP3

Yes, we can never get to a point where we say we the trend setters, you never the trend setter you always striving to be a trend setter. You always striving to have the

best website, you always striving to attract more skill staff into the company and constantly looking for newness.

4:13 Most businesses are pushing mobile apps as you know, it's just so easy (5506:5770)
- D 4: Company 2-PP1

Most businesses are pushing mobile apps as you know, it's just so easy, you waiting for the bus, you sitting at home cooking, whatever the story is that's what we trying to promote. It's got to be quick easy, it's got to be visible in the dimensions and the specs.

4:22 In a bricks like company four corporate or even smaller ones or wholesale (10250:10406) - D 4: Company 2-PP1

In a bricks like company four corporate or even smaller ones or wholesalers, they all have different programs that you can purchase and adapt for your business.

5:16 So it's giving opportunities within the company and seeing the talent (4604:5217) - D 5: Company 2-PP2

So it's giving opportunities within the company and seeing the talent and just listening. Listening to those ideas to be able to put those actions and events into place like I came up with an idea in 2015. So I was buying at the time ladies apparel and a lot of my local designers were showing at Cape Town fashion week and I went to shop the ranges as soon as they walk down the catwalk and we made it happen. As soon as Michelle Ludek ranges walked down the catwalk we pushed live on the website and customers could buy it straight away. I mean what an idea and I mean we could follow that all the way through.

5:40 So the first time buyer is very high for us on cash on delivery because (14246:15178)
- D 5: Company 2-PP2

So the first-time buyer is very high for us on cash on delivery because they want to test us first and we able to do cash on delivery because the majority of our drivers from the warehouse are all in-house so we only outsource our regional distribution. Our more local distribution is all in-house so we can offer cash on delivery. So we constantly growing, so it's an understanding your market and understanding how you

speak to them how they work. It's incredible, who they are, where do they live, where do they want their orders delivered, is it at work, visit at home or do they want click and collect. You constantly adapting, I mean you constantly learning new things because our market is so new in e-tailing that you have to constantly adapt and your age spectrum is always changing as well and your customer profiles always changing and that's what I love about company 2, you not a set customer profile you're a shopping mall.

7:2 Also just customer facing meaning having the right product, at the rig (783:1653) - D

7: Company 3-PO1

Also just customer facing meaning having the right product, at the right time sending out the right communications at the right time and just being relevant at the right time and that's obviously having the right marketing mix that helps all those channels succeed. Your marketing mix, when we speak about online having the right product, having the right marketing communications, being relevant to the customer at the right time, at the right place and obviously those channels are quite important and as an e-commerce business you have to make sure all those channels are explored from a digital perspective. When you talk about social media what the strategy for that looks like when we talk about paid media, what that strategy looks like. When we talk about launches, what that looks like. I'd say the marketing mix and all those channels that you have to exploit.

7:5 So most of these factors i mentioned are very relevant and relevant to (2396:2655) - D

7: Company 3-PO1

So most of these factors I mentioned are very relevant and relevant to most competitors. We also look to each other to see who's doing what and what are they doing better than us so I think it is relevant to our self and other online companies in South Africa.

7:7 Very often, as an e-commerce or digital who works in the digital retail (3131:3494) - D

7: Company 3-PO1

Very often, as an e-commerce or digital who works in the digital retail space you have to remain innovative all the time. You have to look for new ways on how to approach

your strategy and how to approach your digital platform or online platform so we constantly finding ways on how to do that whether it's from a social media perspective, from a paid media perspective

7:8 So are we going after how people can see our communication. Example (3584:4219) - D 7: Company 3-PO1

So are we going after how people can see our communication. Example you are on You Tube and this ad comes up. So we pay for that space, so when you on your email and this little promo block comes up and it says Total Sports so we follow you so that's some of paid media that we do. Those little ways or new activities we try to become innovative, we try to look for new ways and new spaces, we try to see if there is a way to develop an app to get out to our customer so those new activities are continually being identified not only by us but the broader organisation *to say how can we become better and how can we become competitive.*

7:18 I think they should prepare themselves for their consumer because they (9844:10670) - D 7: Company 3-PO1

I think they should prepare themselves for their consumer because they are having a different idea of how they want to dress and how they want to look like. From everyone going green perspectives, sustainability and conscious movement perspective. Everyone is soon enough going to be opening their eye to say what are you using on your products, what do you stand for as a brand. Actually your products are not good for me so I'm going to make my own which opens up a new business and these types of people are opening up their own businesses and so there's a lot of small businesses and you start seeing the customers shift in a different way to products they trust and identify with. Example rather buy from Kayla and support her then buy from a TGF who doesn't really know me, they've shown they don't really care about me.

8:1 non comp opportunities are a big focus in retail today where we have t (469:629) - D 8: Company 3-PO2

non comp opportunities are a big focus in retail today where we have to constantly look at new ways to innovate and test new product types to win market share.

8:13 In order to stay ahead of other retailers and to be competitive you ne (2441:2712) - D
8: Company 3-PO2

In order to stay ahead of other retailers and to be competitive you need to ensure your online activities are managed over key time periods only, i.e. Valentine's day, Mother's day. If this is not managed the customer will get tired and no longer find it new and exciting.

8:23 Our key business model is to sell clothing as we are a retailer. A st (4442:4748) - D
8: Company 3-PO2

Our key business model is to sell clothing as we are a retailer.

A strategic objective is done seasonally (every 6 months) where we identify our key findings through a SWOT analysis. We will use previous information to identify key historical data as well as new trends to then merge a new business plan.

9:18 There is of course a marketing strategy that is identified at the begin (5487:6163) - D
9: Company 3-PO3

There is of course a marketing strategy that is identified at the beginning of the season and would then filter down to key strategy for online, stores, magazines etc.

The online landscape grows and changes as the demand from our consumers change new activities need to change or adapt. The same can be said for our competitors in the marketplace, as their directions changes and new deals launch, company three will have to adapt in order to remain competitive in the marketplace.

Although it is important for a business to remain on the path that was agreed upon there are many environmental changes that take place that require adaptations and these activities will need to change.

9:30 Mobile shopping APP (8332:8351) - D 9: Company 3-PO3

Mobile shopping APP

10:7 New areas or activities are most often identified at key strategic poi (2161:2432) - D
10: Company 4-PO1

New areas or activities are most often identified at key strategic points in time, generally every 3 years from a total business perspective and every year / every 6 months from a specific group perspective, always taking the total business 3-year strategy into account.

10:14 Be innovative, and in the long term work to differentiate the business (3581:3698) -
D 10: Company 4-PO1

Be innovative, and in the long term work to differentiate the business from the competition (local and international).

11:5 Technology is evolving & everyday there are external factors that are (1393:1732) -
D 11: Company 4-PO2

Technology is evolving & everyday there are external factors that are not taken into account or new to us. It's about taking the information and finding ways to make it either relevant to us & our customer.

At the moment there is a lot to learn about what the customer is shopping since the consumer is stuck indoors during Covid19 shutdown

11:11 Ways of working can always be improved and to find new ways – digital (2538:2678) - D 11: Company 4-PO2

Ways of working can always be improved and to find new ways – digitally to range build / present ranges. This can allow things to move faster

11:14 I think long term with a few short term goals. This will help to revis (3435:3641) - D
11: Company 4-PO2

I think long term with a few short term goals. This will help to revisit the strategy at checkpoints to see if things are going smoothly, if not its opportunity to deviate and work on areas that are lacking.

11:16 To think out of the box and always being innovative but sticking to th (4066:4257) -
D 11: Company 4-PO2

To think out of the box and always being innovative but sticking to their business at the core – you won't have credibility as a retailer if you are constantly changing what the customer sees

12:12 Constant market scanning for new opportunities: adopt a test and rollo (2029:2130)
- D 12: Company 4-PO3

Constant market scanning for new opportunities: adopt a test and rollout approach to new technologies

As previously mentioned, retailers are required to make online shopping exciting for the consumer by introducing newness, constantly having fresh ideas and planning for events at key periods throughout the year. An example is Amazon, enticing consumers with books for sale online at considerably cheaper prices, thereby deterring customers from purchasing books from traditional bookstores (Moon et al., 2017:13). Technology plays an essential role in conveying the innovativeness across various platforms. The ability to alter and adapt at the last minute nevertheless remains crucial in such a competitive landscape.

The researcher's encounter with the pure players revealed more emphasis on innovativeness and having to adapt quickly to situations than was the case with the hybrid retailers. Since pure-players do not trade in physical stores and have not been around for as long as the brick-and-mortar retailers, the need always to act fast and provide diverse product offerings with no limitation are embedded in their company culture and employees. Below note the responses from the pure-players:

2:19 For very unpredictable and ever-changing environment and there's nothi
(8195:8419) - D 2: Company 1-PP2

For very unpredictable and ever-changing environment and there's nothing that is set in stone. You can have literally have the best strategy, you have people working on it 24/7 but it doesn't mean she's going to shop online.

5:1 For company two there's no limitation. It is about being a shopping mall of
(1060:1574) - D 5: Company 2-PP2

For company 2 there's no limitation. It is about being a shopping mall of South Africa but online. So don't think of us as a brand you think of us as a Sandton, Mall of Africa,

Canal Walk, Tiger Valley. We are a house of brands, we have limitation when it comes to warehousing and certain products, we only are fashion so we haven't gone into food or alcohol or electronics at this stage but it is always something we can consider in the future depending on how we grow within the market. Company 2 is a fashion online website.

4:14 That's why when you look at a business-like company two you get the purchasing(5771:6129) - D 4: Company 2-PP1

That's why when you look at a business like company 2 you get the purchasing division, then the marketing and be it business intelligence and I.T, they all just as big as you know in a bricks business you'll have the merchandise division which is the biggest division and then the others are support whereas in e-commerce they all just as important as each other.

9:14 All online retailers need to remain relevant and be able to adjust to (4221:4500) - D 9: Company 3-PO3

All online retailers need to remain relevant and be able to adjust to the ever-changing environment

8:26 Retailers need to ensure they are clear on who their target markets are (5774:5872) - D 8: Company 3-PO2

Retailers need to ensure they are clear on who their target markets are when communicating online.

Code 4: Pricing margins and profitability

Pricing and profitability constitute a prominent CSF for various companies. One of the aspects mentioned in this code pertained to ensuring that the pricing is right so that the margins yield profit. Pricing is an important and integral component of the survival of the business since it directly affects revenue and profit.

1:1 Some of those critical success areas is generally for all retail or mo (611:954) - D 1: Company 1-PP1

Some of those critical success areas are general for all retail or most of retail. It's having the right product, at the right time, at the right price. Those three as simple as they are, it's complex in a way that a lot of forward planning has to be done to get the product in at the right time and in the right place and at the right season.

1:5 Then correct pricing, pricing is key especially in South Africa and in (2246:2974) - D 1: Company 1-PP1

Then correct pricing, pricing is key especially in South Africa and in our economy. As much as the guy and the girl loves fashion it's still about price point. So if you put a R299 Levi's shirt next to a R299 private label shirt, chances are you going to sell the Levi's shirt more because they see the value for money in a brand and the price is right but if you put up Levi's against another brand that's unknown, you know that the customer will drift towards the brand they aspire to and the other item won't trade as strong. So weighing up the option of what is important, what are the on demand brand and what are the key pricing from those brands because some brands can sell very expensive items and other brands cannot.

1:7 In a sense that it is a business. We still have targets to hit, you go (3390:3848) - D 1: Company 1-PP1

In a sense that it is a business. We still have targets to hit, you got to spend money to make money so we have to very critical and very logical on how we spending each and every rand in our business. Give you an example, a R20 million budget is based on history and previous sales, brands that contributed the most therefore, on a company 1 level, invest in recognised brands. Look how the market is trending, it's a hierarchy structure regarding styles.

1:10 Having the right product at the right time is key to all businesses. R (4092:4752) - D 1: Company 1-PP1

Having the right product at the right time is key to all businesses. Range planning is very key, and then another important thing is dealing with suppliers and getting the best price. Getting the best sales margin is important. We have a saying in retail, revenue is vanity and sales margin is your actual goal. A lot of businesses go wrong with that and just slash their margin and that's why companies don't like marking

down the product because you lose so much sales margin from that so we try and sell 60-70% of all ranges at full price for the season. A season, we talking three months so ideally any item we want to clear at the highest possible margin.

1:14 Yes, it's got to be. You just have to remind people of the product that (7002:7246) -
D 1: Company 1-PP1

Yes, it's got to be. You just have to remind people of the product that you have. The product has to be shown in the most commercial way possible because anyone can stock Gucci but how many of us can buy Gucci and how many of us can sell Gucci?

1:36 Even places like Runway sale, selling on promos and markdowns they mak
(15363:16509) - D 1: Company 1-PP1

Even places like runway sale, selling on promos and markdowns they making good margin. We have to educate the customer that you have to buy at some degree at full price and that's not saying we not going to offer you promo and discount but we've developed a culture over the years that says to people only buy when it's on sale. Retail should rather work at getting a better price up front so that the customer feels buying a R249 t-shirt is okay and its good quality and fabrics and using good initiatives. That's one of the hardest things to do that's a challenge for us at the moment, is getting the customer to buy at full price but also making sure that full price is not a crazy amount. Growing your customer base, the attention span of a customer lately is as short as a music video. We need to keep reinventing ourselves and pushing boundaries but at the same time give people a fair price in the market. That's very crucial for me, there has to be integrity in what we do in that sense that the customer is getting the best possible deal and we note ripping them off and they buying high-quality goods at the best possible price.

4:16 but it's very important where you ranked on Google when you start sear (6571:7147)
- D 4: Company 2-PP1

but it's very important where you ranked on Google when you start searching example as a customer you want to buy Levi's jeans so you put in Levi's jeans and in Google the first three are paid adverts but then the rest will all go into ranking and that ranking works on how much content you create, who many people click through to

you so you earn that ranking and that's very important and you can drop ranking very easily. If you don't create enough content or don't display your business properly you'll end up dropping down so all these things play a very important factor.

5:22 So the economy is in a bad situation so let's look at our pricing structure (7172:7480)
- D 5: Company 2-PP2

So the economy is in a bad situation so let's look at our pricing structure. Do we have that right entry price point to your premium price point, do we need to lower it, must we start offering more bundles, do we need to offer people more bundles as like packs to buy into so it makes it easier for the customer.

6:3 I'm not sure if this is a success factor but in terms of profitability (1089:1505) - D 6:
Company 2-PP3

I'm not sure if this is a success factor but in terms of profitability, that's definitely our biggest, biggest focus and everything that we do centres around that and that goes back to buying the right stock with the right price, having it at the right time and also having an understanding of where we sit on the market, who is our customer and who do we want to be which for us is building an online fashion mall.

6:5 They obviously critical ones, they ensure that we follow consistent st (1907:2232) - D
6: Company 2-PP3

They are critical ones, they ensure that we follow consistent strategy, that we don't lose sight of what is the most important which is to build and retain our customer base whilst remaining profitable. At all times that we understand what our market position is but under there everything comes back to profitability.

6:6 At this stage, I definitely think for other retailers in terms of the (2328:2811) - D 6:
Company 2-PP3

At this stage, I definitely think for other retailers in terms of the online space now we sort of like years into it so in the beginning it was very much a strategy around let's just get as many products in as customers as we can and build ourselves up and we now have sort of gotten there. It's now what can we do to make the business

profitable. I would say most would be in that space and in terms of the traditional brick n mortar retailers they definitely would be a key focus.

6:8 Quite frequently. We have experienced shifts in strategy as I mentioned (3207:3355) -
D 6: Company 2-PP3

Quite frequently. We have experienced shifts in strategy as I mentioned just from expanding the business to now turning and focusing on profitability

6:13 You have to protect that even though all of these external factors do (5076:5219) - D
6: Company 2-PP3

You have to protect that even though all of these external factors do drive up our costs we need to make sure that whether its key price points.

6:14 r if we adding a little more to the customer so that the product has l (5221:5677) - D
6: Company 2-PP3

Or if we adding a little more to the customer so that the product has longevity or we focus on our brands that we know customers will buy into regardless the big sport brands. So it's just protecting and maintaining the value proposition, being extremely critical of products and brands that we do bring in and keeping it simple and focusing on what is going to actually drive profitability for us. There is no room for extra product or anything like that.

6:26 In this particular economy where everybody is discretionary income is (10368:10851)
- D 6: Company 2-PP3

In this particular economy where everybody's discretionary income is just shrinking it is very difficult. I mean it comes back to getting the right product at the right price from the beginning and driving that value proposition so that people are willing to actually pay full price for this. I mean if your competitors are doing it, it's not sustainable in the long term so it should shift but it's just to get that right product that a customer wants to buy off the bat at full price.

6:27 If the product is right at the right price point then i think we good to(10923:11176) - D
6: Company 2-PP3

If the product is right at the right price point, then I think we good to go. It just means controlling your stock and you buy very tightly but it is very difficult when your competitors do such aggressive promotions on stock that we necessarily wouldn't.

7:8 So are we going to after how people can see our communication. Example (3584:4219) - D 7: Company 3-PO1

So are we going to go after how people can view the brands' social presence and how we choose to communicate with the customer. Example you are on YouTube and this ad comes up. So we pay for that space, so when you on your email and this little promo block comes up and it says company 3 so we follow you so that's some of paid media that we do. Those little ways or new activities we try to become innovative, we try to look for new ways and new spaces, we try to see if there is a way to develop an app to get out to our customer so those new activities are continually being identified not only by us but by the broader organisation to say how can we become better and how can we become competitive.

8:9 Yes, this is something all retailers practice, however to ensure you a (1765:1940) - D 8: Company 3-PO2

Yes, this is something all retailers practice, however to ensure you are ahead of all retailers and trends, you should have a good marketing strategy in place to market online.

9:1 It is important to note that company three's group company takes pride in having a unique online (544:751) - D 9: Company 3-PO3

It is important to note that company 3 takes pride in having a unique online platform space with the likes of the introduction of company 3's group offering online where all brands are brought together and are showcased.

9:3 Ensuring that there is presence across all social media platforms. It (1114:1690) - D 9: Company 3-PO3

Ensuring that there is presence across all social media platforms. It has become evident that to be relevant a brand must be present and constantly engage on various platforms. Although many businesses look at Instagram and Facebook as the key

areas of focus, additional platforms such as Twitter and the less popular LinkedIn platforms should remain a focus to draw in customer engagement.

Recently it has been mentioned that social media platforms such as LinkedIn engage with a completely different consumer and also allows consumers to see a different side to a business.

9:9 Another activity included is remaining relevant in the marketplace. T (3025:3222) - D 9: Company 3-PO3

Another activity included in remaining relevant is the marketplace. The team that leads the online, social media presence should be up to date with what is happening within the sporting landscape.

9:10 This is something that TS as a business does well, an example being wh..... (3223:3407) - D 9: Company 3-PO3

This is something that company 3 as a business does well, an example being what taking place on social media is tight now, in terms of the various challenges which creates social engagement.

9:13 I believe these factors are relevant to all organisations'. In today's (4058:4220) - D 9: Company 3-PO3

I believe these factors are relevant to all organisations'. In today's environments all brands are ensuring that they have a good online and social media presence.

10:2 Successful Competitive performance is dependent on selecting product a (652:916) - D 10: Company 4-PO1

Successful competitive performance is dependent on selecting products and buying products in a way that meets customer requirements. e.g. customers may want two-piece bikinis, we may range them but may range too few or too many options or too little or too much volume.

11:18 People are also investing in items and do not necessarily have disposa (4259:4421) - D 11: Company 4-PO2

People are also investing in items and do not necessarily have disposable income. So customers are making decisions about what they are buying. Trade will be tough.

1:27 We do a lot of long term planning but a lot of midterm planning so fro (12207:12702) - D 1: Company 1-PP1

We do a lot of long-term planning but a lot of mid-term planning so from a long-term point of view we have a five-year plan and a five-year goal that we need to get and mid-term is the financial year. So in order for us to get to the five-year plan, we need to make target in all five financial year ends and if we missing one, where will we make it up? And what strategies are we going to have? Are we going to do a Black Friday bigger or a group sale even bigger with the best marketing outreach?

As is evident from the above excerpts, this code reveals that planning, budgeting, negotiating with suppliers and most importantly, achieving targets, are the core activities of the business. Everyone is working toward one common goal and that is to be profitable. Many participants mentioned the negative state of the economy at present, which was resulting in their having to make tough decisions.

Promotions and discounted items hinder profitability for the business, so retailers try to avoid sales and discounting items as much as possible. To counter major losses due to discounted items, plans are put in place to market certain events on a large scale, such as Father's Day and Black Friday.

Code 5: Product testing and monitoring

Product testing and monitoring remains a critical aspect of business success. Participants confirmed that their strategies to ensure the success of a product included testing and monitoring. Once a product has been put online for sale, the company would look at how the product is performing in terms of sales and, based on the market reception of the product, the company is able to make a decision on the relevance of the product in the market. The profitability and sales of a product need to be monitored, and this is often a factor in the strategic meetings when products are selected for selling.

1:13 They determine both to be honest. Short term growth they do play a big (5878:6937) - D 1: Company 1-PP1

They determine both to be honest. Short term growth they do play a big factor in daily targets that lead to weekly targets which lead to monthly targets which lead to quarterly targets. We break up the year into four quarters and making target throughout means you're able to hit our annual target. We break up our targets but in that, know where the slow trading periods are and when peak trading periods are in order to make the most money. For instance, Jan and Feb is the slowest months in retail, everyone is on sale no one wants to buy full price items everyone is looking for a great deal, everyone is broke from December so we know it's a slow trading month. If we making target constantly, then we overachieving which is the space we want to be in and overachieving comes from having the correct range at the correct time, correct price at the right moment. These targets keep us focused on the bigger picture which is us making target for the financial year. Another key thing is marketing the product. If we not marketing we not going to make money.

2:6 It depends, you have a big overall strategy, you have a 20-year strategy (2254:2708) - D 2: Company 1-PP2

It depends, you have a big overall strategy, you have a 20-year strategy and we have a road map to get there and then you break that down into chunk size bites so you'll break down into a 10-year, a 5-year, a 3-year, a 1-year and then you'll have to try and determine priorities so what is the stuff that we have that isn't broken that we can hold on. What is the stuff that's broken that we need to completely review and what are the new opportunities.

2:13 Yes, definitely. If the strategy is clear and you do not achieve what (5411:6075) - D 2: Company 1-PP2

Yes, definitely. If the strategy is clear and you do not achieve what you sought to achieve but you adhere to the strategy, then you know that the strategy was wrong. But if you have a strategy and along the way you didn't really adhere to it and did other things you never going to know if the strategy was right or wrong because you didn't really bother with it so for a business to be able to learn from its mistakes and to see opportunity and growth you definitely need to have had clear strategic processes that you know we did this to the best of our ability and if it doesn't work we know we need to change it. So yes definitely I think it's very important.

2:16 Yes it is department specific. Because you would break it down to see. (7285:8082) -
D 2: Company 1-PP2

Yes, it is department specific. Because you would break it down to see. We do a SWOT after every season and you see where the opportunities were, where the strengths were, where are the threats and you do a full SWOT. Based on that SWOT you see how does it feed into the main strategy. If the main strategy is to attract a younger customer then it's about understanding what were the opportunities and weaknesses in those brands that were supposed to be appealing to her and then how do you shift and change from there or is it understanding that the customer now has children and she owns her own home. She's no longer a student with an apartment, *you would then focus on your homeware offering and kids wear offering so that's how each department will feed into the main top-line strategy.*

3:7 We improve all the time. Even the site, if you go on the site two week (2446:2580) - D
3: Company 1-PP3

We improve all the time. Even the site, if you go on the site two weeks back. A week, two weeks later there are changes that are there.

5:5 it's not about the 2-year plan but the 20-year plan, it's not about th (2157:2337) - D 5:
Company 2-PP2

it's not about the 2-year plan but the 20-year plan, it's not about those quick ones, it's about how you establish a good performing company. It's about efficiency, profitability.

5:34 So it starts off top-line, it starts with the MD, then it goes to us (12100:13184) - D 5:
Company 2-PP2

So it starts off top-line, it starts with the MD, then it goes to us managers. We have a monthly management meeting where we report back on all of our strategies that is then fed back on weekly team meetings. We have a debrief for the whole of the team once a week. And then within the team you have catch ups once a week as well. And it's constantly going through where we at have we achieved it, are we missing deadlines, what else has come up, what we need to prioritize. So it's very much at the forefront that we follow through on things. We not putting strategies out there that

don't get completed and everyone's responsible for it, from someone's who's in admin to because if your admin is not accurate in inputting finance or purchase orders you've already got a block of getting the stock in or the supplier paid. So everyone in the company is responsible actually for the strategy being implemented whereas other companies its more just about the manager but in this company it's not. You constantly empowering people to take responsibility and to grow within their role.

5:43 We do it seasonally. We look at the top 20 brands seasonally and give (16420:16934) - D 5: Company 2-PP2

We do it seasonally. We look at the top 20 brands seasonally and give them a spec of what's worked well. We do a SWOT, like a review every season like by category and by product and that's important for us to grow the business together. It could be on sizing, it could be on colours, it could be on shapes. One retailer never did skirts before, I told them to introduce it in summer. It's now one of their bestselling category, so you constantly working and growing with them to be able to do the business we need to

6:19 Yes. It definitely is. We will have our top line business strategy and (8231:8355) - D 6: Company 2-PP3

Yes. It definitely is. We will have our top line business strategy and then with what that's based on which is profitability,

8:12 Short term growth is more focused on what drives your basic product tu (2202:2328) - D 8: Company 3-PO2

Short term growth is more focused on what drives your basic product turnover and to maximize on those sales, i.e. stay in sizes

8:13 In order to stay ahead of other retailers and to be competitive you ne (2441:2712) - D 8: Company 3-PO2

In order to stay ahead of other retailers and to be competitive you need to ensure your online activities are managed over key time periods only, i.e. Valentine's Day, Mother's Day. If this is not managed the customer will get tired and no longer find it new and exciting.

8:23 Our key business model is to sell clothing as we are a retailer. A st (4442:4748) - D
8: Company 3-PO2

Our key business model is to sell clothing as we are a retailer.

A strategic objective is done seasonally (every 6 months) where we identify our key findings through a SWOT analysis. We will use previous information to identify key historical data as well as new trends to then merge a new business plan.

9:4 Weekly reports are done by the merchandise teams in order to monitor p (1703:2122)
- D 9: Company 3-PO3

Weekly reports are done by the merchandise teams in order to monitor performance, the same needs to be done via the e-commerce team with a weekly report feeding back on the areas of concern and the areas of success that the merchandise teams will work towards expanding on for the online landscape

These reports should include highlights that the business can use to make decisions going forward for the online offering

9:16 These factors relate to both, as this environment is ever changing the (4815:5071) -
D 9: Company 3-PO3

These factors relate to both, as this environment is ever-changing these assist with short-term growth (weekly, monthly). This is particularly true with the weekly reporting and trader meetings that are held, that allows the business to react accordingly.

10:5 Well defined strategies give you targets to work to and measure yourself (1497:1688) - D 10: Company 4-PO1

Well-defined strategies give you targets to work to and measure yourself against. Based on how you achieve strategies you can make adjustments to find better opportunities for the business.

10:17 Company 3-year strategy is revisited at each strategic point in the cr(5019:5555) -
D 10: Company 4-PO1

Company 3-year strategy is revisited at each strategic point in the critical path, Strategies are then revisited at group and department level. There are defined points in time for strategy development at every level (i.e. company level, business unit level, group level and department level), all strategies are developed taking both global trend and more local market influences into account. Strategies are then implemented and measures defined against which strategies will be checked at various points in time e.g. Season sales target

12:17 Yes, they are through constant measuring of each of the tactical plans(3444:3643) -
D 12: Company 4-PO3

Yes, they are through constant measuring of each of the tactical plans linked to the strategy. Quarterly and monthly score-cards are in place to measure the effectiveness/ implementation of the plan

These quotations indicate that product testing and monitoring takes place through SWOT meetings that occur at the end of every season. Gurel and Tat (2017:1005) agree that SWOT analysis enables teams to conduct a strategic analysis of an item, a product or of the industry. More commonly, weekly trade meetings take place to monitor how well or poorly a product is selling. In addition to the above, the firms work according to a seasonal strategy and a strict critical path to ensure that deadlines are met.

Finally, both long-term and short-term strategies, regularly reviewed, are a feature of the business operations of all participants. The sales and performance of the current season are continually monitored, and this determines plans for the following season.

Code 6: Marketing: advertising, promotions and social media presence

Advertising, promotions and a social media presence remains one of the CSFs for e-tailers. Companies advertise their brands and products on various platforms such as social media, television and radio. Promotions are also effective ways to attract consumers and increase sales for targeted brands. Another aspect mentioned is the use of social media to create social presence. Companies put a great deal of effort into their marketing strategies, as highlighted in the comments below:

1:12 So learning about the study, how many pages do they go before they sto
(5257:5785) - D 1: Company 1-PP1

So learning about the study, how many pages do they go before they stop clicking and we've got data that can tell us that. We have to make sure that our hottest product is on those 10 pages and if we get new product we need to push it up to the first pages. There are algorithms that are built in the back end that can give that information for us. So it's vital, you don't want the best product sitting on page 30, no one will know. Me, as an online shopper, I don't go past page 5 because then I feel no, this is just old product.

1:30 It costs you more to gain a new customer than to retain old customers (13449:13655) - D 1: Company 1-PP1

It costs you more to gain a new customer than to retain old customers. New customers you have to give vouchers, gift cards all this in order for them to get used to spending money and using it on your site.

2:9 You have to chase what the customer is wanting so if you seeing certai (3435:3745) - D 2: Company 1-PP2

You have to chase what the customer is wanting so if you seeing certain things flying or certain things she just can't get enough of, that's where you need to chase and that's where the bulk of the attention goes and then you have your little bits that's high fashion that make you look relevant alongside that.

4:16 but it's very important where you ranked on Google when you start sear (6571:7147) - D 4: Company 2-PP1

but it's very important where you ranked on Google when you start searching example as a customer you want to buy Levi's jeans so you put in Levi's jeans and in Google the first three are paid adverts but then the rest will all go into ranking and that ranking works on how much content you create, how many people click through to you so you earn that ranking and that's very important and you can drop ranking very easily. If you don't create enough content or don't display your business properly you'll end up dropping down so all these things play a very important factor.

4:18 Very often, for example marketing. We do a monthly plan, then we do a (8321:9247) - D 4: Company 2-PP1

Very often, for example marketing. We do a monthly plan, then we do a weekly plan as well so lastly down to weekly because we have to respond to our business. Example we overstocked in dresses, we need to do a social media call-out on new fashion dresses or for customers to shop dresses starting from R299. So we do newsletters that go out sometimes 3 or 4 times a day to targeted customers so if you're a shopper that shops young fashion then you'll only get that if you a shopper only shops men's then you'll get the men's retailers so they are segmented but these activities are weekly. We have long-term strategies obviously that we plan for the year. Management get together and say these are the areas of focus and these are the goals that we want to achieve, and this is the time frame and this is the action plan and this is who is responsible for I.T and these are our long-term annual goals – but we also have weekly goals like respond to trade.

5:22 So economy is in a bad situation so let's look at our pricing structure (7172:7480) - D
5: Company 2-PP2

So economy is in a bad situation so let's look at our pricing structure. Do we have that right entry price point to our premium price point, do we need to lower it, must we start offering more bundles, do we need to offer people more bundles as like packs to buy into so it makes it easier for the customer.

5:23 exactly. Buy one get one free, buyer an outfit for 20% off. Things like (7536:7721) - D
5: Company 2-PP2

exactly. Buy one get one free, buy an outfit for 20% off. Things like that, we launched swimwear on our website last year so the moms can get everything under one roof. It's convenience.

6:21 So marketing will achieve it in different ways versus we would versus (8450:8606) -
D 6: Company 2-PP3

So marketing will achieve it in different ways verse how we would achieve it and verse the way finance would, but it all rolls up into the main one and it definitely does get pushed down.

6:24 There is quite an aggressive discounting cycle that goes on online I k (9915:10336) -
D 6: Company 2-PP3

There is quite an aggressive discounting cycle that goes on online, I know you've seen company 1. I'm sure they always discounting and offering deals and we need to try and compete with that so you kind of just run into this constant discounting cycle to try and get the customer to buy something full price after they've been conditioned to be like there is always going to be a deal or a sale is another very big challenge.

7:2 Also just customer facing meaning having the right product, at the right time sending out the right communications at the right time and just being relevant at the right time, and that's obviously having the right marketing mix that helps all those channels succeed. Your marketing mix, when we speak about online having the right product, having the right marketing communications, being relevant to the customer at the right time, at the right place and obviously those channels are quite important and as an e-commerce business you have to make sure all those channels are explored from a digital perspective. When you talk about social media what the strategy for that looks like when we talk about paid media, what that strategy looks like. When we talk about launches, what that looks like. I'd say the marketing mix and all those channels that you have to exploit.

7:13 we have a marketing calendar that enforces our strategy so we know June is going to be sale, December will be sale we know winter is coming and summer is coming and that is not going to change. Our agility is one thing that keeps us on our toes and keeps us relevant to our customers so we don't have a specific strategy our strategy is being agile and being quick and being able to turn around things quite quickly.

7:13 we have a marketing calendar that enforces our strategy so we know June is going to be sale, December will be sale we know winter is coming and summer is coming and that is not going to change. Our agility is one thing that keeps us on our toes and keeps us relevant to our customers so we don't have a specific strategy our strategy is being agile and being quick and being able to turn around things quite quickly.

8:3 Looking at certain time periods to do promotional activities is a key driver where you can maximise the amount that has to be bought by the customer.

Looking at certain time periods to do promotional activities is a key driver where you can maximise the amount that has to be bought by the customer.

8:6 Promotional activities can support in many ways, depending on the focus (1146:1382)
- D 8: Company 3-PO2

Promotional activities can support in many ways, depending on the focus. Activities like this can help moving multiple units/stock. It also increases the possibility of the customer buying over and above other than the promotional item.

9:6 The use of various payment options for the consumer, consisting of cash.....
(2321:2556) - D 9: Company 3-PO3

The use of various payment options for the consumer, consisting of cash, account where consumers are rewarded for shopping via account. This therefore creates an incentive for consumers to open up company three's group company rewards accounts with the business.

9:8 Online specific launches, these are usually done to create awareness (2821:3012) - D
9: Company 3-PO3

Online specific launches, these are usually done to create awareness of products prior to a bigger launch in stores but this is an effective way that business drive trade on an online landscape.

9:17 This results in us becoming a key partner with brands, in future ensure (5190:5371) -
D 9: Company 3-PO3

This results in us becoming a key partner with brands, in future ensuring that we are first in line for new product launches and the supporting media that comes with these launches.

9:27 Attracting the right customer online, on social media there are ways i (7858:8023) - D
9: Company 3-PO3

Attracting the right customer online, on social media there are ways in which a business can target a specific customer and this comes at a cost to the business.

12:5 Stores: store placement and experience is essential to the customer ex (706:854) - D
12: Company 4-PO3

Stores: store placement and experience is essential to the customer experience which increases the likelihood of repeat purchase likewise for online

Marketing and advertising attract new customers but – more importantly – retain existing customers. Nasir (2017:261) concludes that marketing builds a loyal customer base and generates steady revenue; moreover, items whose retail price is marked down or discounted always lure consumers. The participants emphasised the importance of working towards a plan in the achievement of success. It is also important that all departments are interconnected to ensure that the right product is marketed at the right price and launched at the right time. Gonda et al. (2020:3) confirm that producing a quality product, backed by good service, at the right price, and that enters the market at the right time, enables a retailer to be competitive. Marketing drives the digital image of the company in terms of content and customer experience. The company nevertheless needs to act fast, remaining innovative and responsive.

Code 7: Marketing: brand social identity, reputation and customer retention

Apart from promotions and advertising, companies promote and manage their reputation in order to attract and retain their clients. The main findings under the rubric of this code are the measures that are taken to increase customer loyalty and gain customers' trust. Social media platforms are used to create brand identity and raise awareness about the business.

1:7 In a sense that it is a business. We still have targets to hit, you go (3390:3848) - D 1:
Company 1-PP1

In a sense that it is a business. We still have targets to hit, you got to spend money to make money so we have to very critical and very logical on how we spending each and every rand in our business. Give you an example, a R20 million budget is based on history and previous sales, brands that contributed the most therefore, on a company one level, invest in recognised brands. Look how the market is trending, it's a hierarchy structure regarding styles.

2:2 So we have already got a reputation, there's already a brand identity (389:879) - D 2:
Company 1-PP2

So we have already got a reputation, there's already a brand identity that people know and understand so as far as shopping online in South Africa, company one would be one of the first places you would go to that you would compare to any other

retailer. So if you were looking for something specific, you would go to company four's online store or company one which would be one of those retailers that you would consider as well as oppose to the smaller less fashionable brands.

2:3 Yes, brand identity, its reputation and it's also offering sort of like (925:1136) - D 2: Company 1-PP2

Yes, brand identity, its reputation and it's also offering sort of like the newness, the fashion relevance, price and I think we have all of that going for us and then on top of it we have our own private labels.

2:4 It helps us to achieve our targets and growth. Every business has targ (1253:1674) - D 2: Company 1-PP2

It helps us to achieve our targets and growth. Every business has targets that we need to try and achieve and with factors like having international well-known brands you have beauty, you have footwear, you have clothing, you have kids wear, you got furniture, homeware so you got a lot of categories that can help you to make up your targets and you got in those categories well-known brands as well as home-grown brands.

2:18 You don't know if you make 10 sales a day how many of those are going (9043:9489) - D 2: Company 1-PP2

You don't know if you make 10 sales a day how many of those are going to come back. You going to have to invest quite a lot in your quality and fittings and making sure that by the time it gets to her it's so beautiful and it sits so well that everything is so right that she's not going to want to return it because that's where you end up losing money. It's not as black and white as normal retailing, there's a lot of factors that go into it.

3:3 It is core because if you can't deliver on time it gives us a bad repu (1136:1445) - D 3: Company 1-PP3

It is core because if you can't deliver on time it gives us a bad reputation and if you can't deliver a quality product that the customer expects from you then it affects your

performance. Because we an online store, our website is our store so everything about the store must actually it must be transparent.

3:6 I'd say long-term because we need to build that reputation in the mark (1996:2128) - D 3: Company 1-PP3

I'd say long-term because we need to build that reputation in the market and it takes a while.

3:14 Carvela is sold at Spitz, people starve to save enough money to buy the (4703:5083) - D 3: Company 1-PP3

Carvela is sold at Spitz, people starve to save enough money to buy those shoes. The shoes are R3000 and most people in poor communities buy those shoes. They save for months and they lay-by it. They have to, so if people are willing to go hungry for shoes that means there's something about those shoes that makes the customer want to have it regardless of the consequences.

4:7 Another part of our success is also how we market the product online, (2749:3048) - D 4: Company 2-PP1

Another part of our success is also how we market the product online, we are perceived as a fashion destination where customers can get and understand how to put looks together, what the trends are so it is also about educating the consumer and I think we do that quite nicely, the way our pages look.

6:14 r if we adding a little more to the customer so that the product has l (5221:5677) - D 6: Company 2-PP3

r if we adding a little more to the customer so that the product has longevity or we focus on our brands that we know customers will buy into regardless the big sport brands. So it's just protecting and maintaining the value proposition, being extremely critical of the products and brands that we do bring in and keeping it simple and focusing on what is going to actually drive profitability for us. There is no room for extra product or anything like that.

7:1 From a brand perspective. A successful business usually has a strong (481:782) - D
7: Company 3-PO1

From a brand perspective. A successful business usually has a strong business essence, what the brand stands for. So I'll use examples a lot. If you look at company three's brand and their brand identity, it is very strong. Customers can identify with themselves within the brand so that's one of the points I'd say.

7:5 So most of these factors I mentioned are very relevant and relevant to (2396:2655) -
D 7: Company 3-PO1

So most of these factors I mentioned are very relevant and relevant to most competitors. We also look to each other to see who's doing what and what are they doing better than us so I think it is relevant to our self and other online companies in South Africa.

7:16 For company three then I'll speak for company three's group company. Company 3's brand (8184:9199) - D 7: Company 3-PO1

For company 3's brand then I'll speak for the company as a whole. Company three's brand houses brands so we house brand x and brand Y and your brand Z and the only difference is that we buy that product. For example, like company two would sell it on their behalf. We actually buy the product from a brand and we sell it under our umbrella so we bear all the costs and take the risk and then we also have our own brand that falls under company three's in-house brand. We position ourselves as the house of brands where you can get your favourite premium brands and under that we have company three's brand which is as competitive to your premium brands and more affordable. Brand x for example they have brand x and everything is brand x. We've got 13 brands in total, we own brand A, brand B, brand C, brand D, brand E, you know what I mean and every brand is literally their own company so if you want to look at it like that you can look at it as every brand is their own company and they run it differently and all their business models are different but they all buy products and bear the risk.

9:1 It is important to note that company three's group company takes pride in having a unique online (544:751) - D 9: Company 3-PO3

It is important to note that company 3 takes pride in having a unique online platform space with the likes of the introduction of the company three offering online where all brands are brought together and are showcased.

9:23 Often people stray away from online purchasing as there is a delivery..... (6961:7311) - D 9: Company 3-PO3

Often people stray away from online purchasing as there is a delivery fee required, and this is usually only mitigated when we ask consumers to spend over a certain amount.

This is easier for the branded product as this is usually over the required price point but for own brand this is usually a challenge to push the basket over the required price.

11:17 you won't have credibility as a retailer if you are constantly changing..... (4163:4258) - D 11: Company 4-PO2

you won't have credibility as a retailer if you are constantly changing what the customer sees

12:2 Right stores (483:495) - D 12: Company 4-PO3

Right stores

This CSF is heavily influenced by the brand's image and how it resonates with customers. As mentioned in the quotes, brand reputation is built over a long period of time, and regardless of what the brand stands for, adhering to the company's strategy of what makes the brand individualistic is what has made these retailers successful. Chierici et al. (2019:2018) support this finding, noting that brand reputation not only needs to be built but also carefully maintained and monitored. The key is to offer products that are seen as value for money, together with adequate post purchase service. A positive overall experience improves reputation and results in retaining the customer base. This corroborates Vartiak's (2015:275) finding that a positive

online reputation can increase an e-tailer's customer base, and therefore has to be managed correctly.

Code Group Two: Operations

Code group two reflected the operations within the retailers. It was evident from the responses that operations are the focal point for these e-tailers. The operations serve to link all the divisions, enabling a cohesive experience for the customer and a well-connected business where all processes are streamlined and efficient. For this reason, three codes emerged: code one explored the importance of effective logistics, code two represents efficient e-tailing platforms, and code three established the theme of financial planning and budgeting. These functions and connections are depicted in Figure 5.4, below.

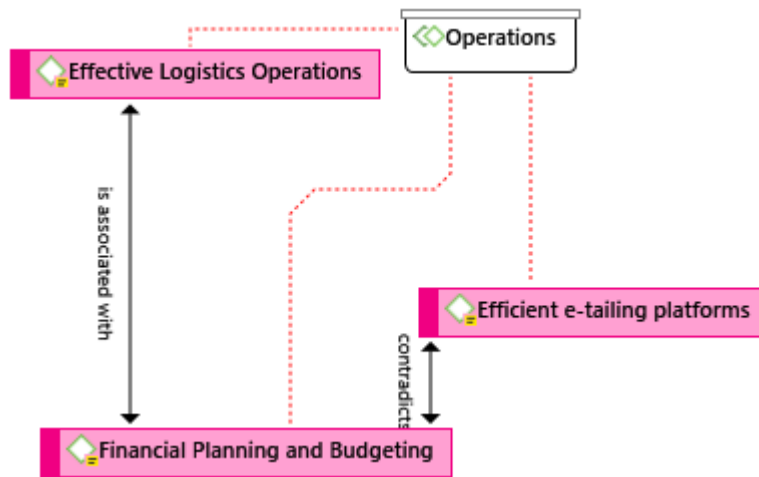


Figure 5.4: Code Group 2

Code 1: Effective Logistics Operations

One of the key CSFs used by the companies is the fluency of logistic operations. The operations include effective systems for ordering, warehousing and delivery. Participants mentioned that they need to have effective and efficient logistic operations in order to ensure that goods are delivered on time and that stocks do not run out.

1:2 A lot of complications do happen before this process is executed perfe (956:1722) - D
1: Company 1-PP1

A lot of complications do happen before this process is executed perfectly. Lead times play a big role for us booking stock, so if you dealing with brands doing buys six months in advance you need to get trend analysis at least three months before that. Budgeting is key because we have OTB which is “open to buy”, but it is essentially just a budget of how much you need to spend as individual buyers and as a department and in that budget you get a category breakdown which simply means how much money we will invest into individual styles. So breaking down by category and what people wear and a good way to always show that is in winter, buyers will buy a lot more jackets than you'll buy shorts but in summer you'll have more shorts than jackets.

1:4 having the right product also means having your core items in the rang (1923:2244) -
D 1: Company 1-PP1

Having the right product also means having your core items in the range which means you never out of stock which we call NOOS so having that in your range constantly throughout the season that's what we call bread and butter of the business, having your core items in the range. You never want to be out of stock of that.

1:11 When stock has there for 3-4months, customers want the next new thing (4753:5255) - D 1: Company 1-PP1

When stock has been there for 3-4months, customers want the next new thing. It's like getting rid of rotting stock and in online it's one of the toughest things to do. The hardest thing to make a sale in online is two things: A, you cannot touch the garment, it's online so how presentable it looks on the model is very key for us and with that we've got so much new stock going live every day that that top that you wearing was new this morning, by the end of the day it will be sitting on page 10 or 11.

1:21 Weather is a big factor for us which leads to cross seasonality, we bu (8852:9159) -
D 1: Company 1-PP1

Weather is a big factor for us which leads to cross seasonality, we buy summer when most brands are showing winter because of Europe. We have to have the relationship

with the suppliers to say can you hold the stock for us for 2 months. Buying cross seasonality is tough, it's tough for us to do on our side.

1:23 I think it's being placed there a little bit now in terms of, brands h (9277:9523) - D 1: Company 1-PP1

I think it's being placed there a little bit now in terms of brands have moved onto taking range buys into quarters so we have more time to react. In the past we would have to buy six months upfront but now we buy 3 months at a time which is key.

5:4 ensuring your deliveries are on time in the warehouse for you to put o (1877:2155) - D 5: Company 2-PP2

ensuring your deliveries are on time in the warehouse for you to put online for your customer to buy. Making sure the customer can get it on time as well, they don't want to wait a week, two weeks it's all about integrity, it's all about being humble, it's about working together

7:11 So they not able to send the product or the product arrives late so we (5500:5775) - D 7: Company 3-PO1

So they not able to send the product or the product arrives late so we are not relevant with the rest of the market so for example Adidas launches their pure boost and we not launching. We not relevant with the rest of the market so in turn that's definitely hindering sales.

8:19 To ensure our key supplier partners are set up to do quick response to (3541:3636) - D 8: Company 3-PO2

To ensure our key suppliers and partners are set up to do quick response to get goods online faster.

10:10 Internally we would also control things like, ease of selection and ba (2910:3032) - D 10: Company 4-PO1

Internally we would also control things like, ease of selection and basket creation, order fill rate, speed of delivery,

11:2 smooth running warehouse equipped to ensure stock moves through the wa
(694:782) - D 11: Company 4-PO2

smooth running warehouse equipped to ensure stock moves through the warehouse
efficiently

11:6 The movement towards locally made is great to boost local manufacturing.....
(1889:2068) - D 11: Company 4-PO2

The movement towards locally made is great to boost local manufacturing but for a
big online retailer those small manufactures can't keep up with production needs of
big retailers.

The interviews confirmed that if logistics are not up to speed then the business loses competitiveness. This may result in a loss of sales, because products are not available for sale to the public. This is in line with Rao and Mohan's (2017:782) finding that logistics forms part of the core focus of online retailers. This type of retailer is reliant on well-systemised warehousing that can accommodate a large quantity of products. There is a standardised inventory system that both the retailer and supplier use to receive updates regarding stock or replenishments in real-time. Jermstittipartsert et al. (2019:789) note that this MIS (Management Information System) is a crucial supply chain system which culminates in warehouse efficiency. No business operates in isolation, so building strong, efficient partnerships with suppliers and any third party companies is crucial.

Code 2: Efficient e-tailing platforms

Participants referred to the role of e-tailing platforms and websites. An effective website needs to be able to display and position products in an accessible and web-friendly manner. The design of the e-tailing site needs to have an effective ordering system that integrates secure payment options and keeps track of the delivery. The website needs to be user-friendly and focused on the customer experience. Effective websites can be regarded as a CSF to attract and retain customers.

2:19 For very unpredictable and ever-changing environment and there's nothi
(8195:8419) - D 2: Company 1-PP2

For very unpredictable and ever-changing environment and there's nothing that is set in stone. You can literally have the best strategy, you have people working on it 24/7 but it doesn't mean she's going to shop online.

3:1 I would say our site sets us apart which makes us more successful (446:802) - D 3: Company 1-PP3

I would say our site sets us apart which makes us more successful. It's easy to use, our logistics and delivery. We able to deliver all over the country and at the speed and besides the speed we notify the customer throughout that the parcel will be arriving at that particular time and we have a very good track record and we have a wide product offering.

3:3 It is core because if you can't deliver on time it gives us a bad repu (1136:1445) - D 3: Company 1-PP3

It is core because if you can't deliver on time it gives us a bad reputation and if you can't deliver a quality product that the customer expects from you then it affects your performance. Because we an online store, our website is our store so everything about the store must actually it must be transparent.

3:9 when you set up your website for Android, it's different to Apple or I (2893:3304) - D 3: Company 1-PP3

when you set up your website for Android, it's different to Apple or I phone and it's different to your desktop, how you view the site and interact because you can update the site only for desktop and leave them mobile alone. Or you can do mobile and not touch the desktop so obviously that's based on your activities so where are you getting your most traffic from, is it traffic from mobile or traffic from desktop.

3:10 And obviously you guys have ways of tracking that? PP3: Yes yes, we (3362:3460) - D 3: Company 1-PP3

And obviously you guys have ways of tracking that?

Yes, we have systems to track that.

4:3 Company two is going through an interesting migration process at the moment (1239:1372) - D 4: Company 2-PP1

Company 2 is going through an interesting migration process at the moment which will put us really or allow us to be leaders in e-tailing.

4:6 Previously we had different systems working in finance in the warehouse (1948:2659) - D 4: Company 2-PP1

Previously we had different systems working in finance, in the warehouse, in merchandising and they weren't all talking to each other so now we've taken on the group system it's one standardised system and that was actually necessary to sustain the growth that company two is going for we had to move onto this new system. Also when you listed on the stock exchange you have to have one version of the truth really, you can't have conflicting reports so this is a big step for company two but at the moment we going through the migration and it's a bit rocky at the moment. We have a new website that people are getting used to and you know people don't generally like change so at the moment it's looking a little different.

4:8 An area that is very important for online shopping is the whole UX UI (3049:3538) - D 4: Company 2-PP1

An area that is very important for online shopping is the whole UX UI (user experience/ user interface) experience that is critical to the success and we still in the process of formulating that because the system that we've taken on from company 2's group is very much what we refer to as marketplace. Company 2's group also has what we buy outright so we invest, what we refer to as the retail division of the group, so we still need to make changes to the whole groups system to allow for that retail side.

4:12 We have thousands of SKU's available but if you shopping specifically (5099:5503) - D 4: Company 2-PP1

We have thousands of SKU's available but if you shopping specifically for a cross body handbag you want to be able to hone in onto only just those, so it's important that our website is clear and specific otherwise it just becomes a sea of products and

that's the most important part. Because if you as the customer cannot find it in a quick space of time you've moved on because it's so easy to shop online

4:15 Also, not only how you navigate around the site but the content that y (6412:6570) - D 4: Company 2-PP1

Also, not only how you navigate around the site but the content that you create so that's obviously very important and this is more of a marketing discussion

5:29 We have e-com as well. I'm not going to go with what was said in your (10155:10473) - D 5: Company 2-PP2

We have e-com as well. I'm not going to go with what was said in your interview yesterday. So e-com is a service that is very exciting where when I started 9 years ago we would knock and bang on doors and people wouldn't open this door for us. Now people are coming to us can you set up our website, can you run it for us

5:39 We offer amazing things like payment methods, we offer cash on deliver (13939:14245) - D 5: Company 2-PP2

We offer amazing things like payment methods, we offer cash on delivery for the South African market. We didn't have that when we first started because we implemented only credit cards but half the country doesn't have a credit card they've got accounts but not credit cards so we introduced cash on delivery.

7:12 What I like about our e-commerce platform is that we very agile so we (5892:6032) - D 7: Company 3-PO1

What I like about our e-commerce platform is that we very agile so we are able to identify something in the market and try and make it happen

8:18 proper infrastructure to support all technology aspects pertaining to (3453:3539) - D 8: Company 3-PO2

proper infrastructure to support all technology aspects pertaining to online shopping.

8:20 To ensure our key supplier partners are set up to do quick response to (3541:3635) - D 8: Company 3-PO2

To ensure our key suppliers are set up to do quick response to get goods online faster.

8:27 The key to ensure a successful online retailer is to have the technology (5873:5980)
- D 8: Company 3-PO2

The key to ensure a successful online retailer is to have the technology and info structure to support it.

9:31 Currently the more users online then the slower the system, harder it (8363:8594) -
D 9: Company 3-PO3

Currently the more users online then the slower the system, harder it becomes for customers to complete transactions, need to improve online space to accommodate the volumes

– Faster replenishment systems for out of stock

10:18 E-tailers need to refine their platforms with speed to be as competition (5695:6064)
- D 10: Company 4-PO1

E-tailers need to refine their platforms with speed to be as competitive as possible. There will be a huge increase in e-tailing due to lockdown. Lockdown would have forced more people into e-tailing, there should be many more people accustomed to shopping online than before lockdown. People will become more discerning with regard to the online platforms they visit.

The website is the key differentiator that makes the online retailer unique. Garrett et al. (2016:5) argue that creating innovative and memorable emblems and graphical representations exhibit the uniqueness of an organisation's brand. Employing the appropriate technology and infrastructure to support online activities such as performing transactions and maintaining online speed means the website can accommodate large numbers of users.

The content chosen to be displayed needs to be clear and specific and based on users' responses. The e-tailers interviewed have become specialists in creating online websites. Izogo and Jayawardhena (2018:19) insisted that comprehensive thought be given to website content, because it must have a positive effect on customers' online shopping experiences. The findings

set out below showed that purely online retailers have effectively become a “self-service portal”, where well-known brands can display their product items on the e-tailer’s website.

4:24 This is part of the migration we having at the moment so having to dev (10707:11133) - D 4: Company 2-PP1

This is part of the migration we having at the moment so having to develop the current system from company 2’s mother company to include things like planning and reporting. With marketplace or what we refer to as seller’s centre, that has a great system because it’s done by the different brands. They do it themselves and that basically showcases on our website but they manage it all themselves which is a self-service portal that the brands use.

The findings further showed that most of the traffic on the online website comes from mobile phones. This complements Brady’s (2018) finding that a large part of the South African population’s internet connection is via mobile phones. E-tailers see this as an opportunity, a channel to exploit and benefit both customers and themselves.

5:38 We have restrictions such as data, so a lot of our traffic is on mobile (13415:13937) - D 5: Company 2-PP2

We have restrictions such as data, so a lot of our traffic is on mobile. 65% of our traffic comes from mobile phones. So if data is lowered and the cost that we have to pay for it imagine how much more activity you can get on e-tailing. Things like that can help us in the future, people getting more accessible to mobile phones, it’s all about smart phones and understanding how they work. It’s not just about, the retailer it’s actually about how you’re adapting the apps, the mobile desktop function on the website.

3:9 when you set up your website for Android, it’s different to Apple or I (2893:3304) - D 3: Company 1-PP3

when you set up your website for Android, it’s different to Apple or I phone and it’s different to your desktop and how you view the site and interact because you can update the site only for desktop and leave them mobile alone. Or you can do mobile and not touch the desktop so obviously that’s based on your activities so where are you getting your most traffic from, is it traffic from mobile or traffic from des

The most notable finding under this code was that Information Technology (IT) has a crucial role to play in how the user is able to view the online store. Mobile devices (Android and Apple) and desktops need to present different views, depending on typical interaction with the platform, which is constantly monitored. Shaqiri (2015:76) corroborates this finding, reiterating that IT is a capacity of immeasurable worth to an organisation. IT increases market competitiveness by producing suitable software and necessary information; moreover, it is a strategic tool that improves business performance and develops intelligence networks to meet customer demands. Considerable behind-the-scenes planning and technological skill is needed to enable an online retailer to utilise various channels and maximise sales. Garrett et al. (2016:5) observe that with the increase in web browsers, web designers need to remain cognisant of different platforms that online shoppers are using to ensure compatibility at all times. Below are the comments associated with this finding:

6:1 I hope I have the right understanding of it but for us it would be, a (588:883) - D 6: Company 2-PP3

I hope I have the right understanding of it but for us it would be a big thing around our customer experience and what the site looks like to the customer both on desktop and on mobile which is extremely important for us. So it's making sure that our customer experience on-site optimizes sales.

3:8 We've got designers in house, we've got developers in house, we develop (2581:2830) - D 3: Company 1-PP3

We've got designers in house, we've got developers in house, we have developers that specialise in Android, iPhones and then desktop. So they all in house here so whatever developments that need to be done they done in house and done speedily.

Code 3: Financial planning and budgeting

Financial planning and budgeting plays an important role in any business venture. One of the CSFs mentioned by the participants involves short-term and long-term financial planning. Financial planning and budgeting determine what products must be bought, what margins should be sought, and the extent to which the business can withstand an economic downturn.

1:8 OTB which is your budget, is key to all businesses in retail. So you got (3956:4089) -
D 1: Company 1-PP1

OTB which is your budget, is key to all businesses in retail. So you got to have a budget,
budget planning is very key for all businesses.

1:9 In a sense that it is a business. We still have targets to hit, you go (3391:3848) - D 1:
Company 1-PP1

In a sense that it is a business. We still have targets to hit, you got to spend money to
make money so we have to be very critical and very logical on how we spending each
and every rand in our business. Give you an example, a R20 million budget is based on
history and previous sales, brands that contributed the most therefore, on a company
level, invest in recognised brands. Look how the market is trending, it's a hierarchy
structure regarding styles.

1:24 Forward planning in terms of budgeting is key, like you always have to (9524:9722)
- D 1: Company 1-PP1

Forward planning in terms of budgeting is key, like you always have to have money in
the budget to test newness and test new brands, new styles, new fashion in order to
know what customer we gaining.

1:27 We do a lot of long term planning but a lot of midterm planning so fro (12207:12702)
- D 1: Company 1-PP1

We do a lot of long- term planning but a lot of mid-term planning so from a long-term
point of view we have a five-year plan and a five-year goal that we need to get and
mid-term is the financial year. So in order for us to get to the five-year plan, we need
to make target in all five financial year ends and if we missing one, where will we
make it up? And what strategies are we going to have? Are we going to do a Black
Friday bigger or a group sale even bigger with the best marketing outreach?

2:7 Literally customers shopping, sales, I think you can glue everything r (2832:2984) - D
2: Company 1-PP2

Literally customers shopping, sales, I think you can glue everything right and tick
everything right and tick the boxes but you can't make her check out.

8:14 In order to run promotional activities does cost money, so one should (2714:2858) -
D 8: Company 3-PO2

In order to run promotional activities does cost money, so one should ensure that you use this money on the right product at the right time.

8:21 To ensure we maximize sales and to use that data to re-apply test oppo (3638:3718)
- D 8: Company 3-PO2

To ensure we maximise sales and to use that data to re-apply test opportunities

11:8 Internally, the business would need to go through cutbacks & any way to save (2130:2219) - D 11: Company 4-PO2

Internally, the business would need to go through cutbacks & any way to save the company money

12:7 Both as they take impact both the cash flow (short term) and the future (1313:1390) -
D 12: Company 4-PO3

Both as they take impact, both the cash flow (short-term) and the future growth

2:20 Understanding the quality, making sure it fits her so that's something (8637:9043) - D
2: Company 1-PP2

Understanding the quality, making sure it fits her so that's something you end up spending a lot of money on returns, you end up spending a lot of money dealing with quality issues. It comes to her door and if it doesn't look like the way she thought it looked on the site. It's not an easy thing, she touched it she loved it and confidently bought it and by the time she goes home she's going to keep it.

10:12 usability of the site, shopping experience on the site, and then check (3086:3229) -
D 10: Company 4-PO1

usability of the site, shopping experience on the site, and then checkout, safety of the site, return policy, return location, delivery options.

In the findings cited above, financial planning determines each department's budget for the season. Based on the previous season's sales performance, taking risks on certain products forms part of innovativeness, as does testing what works and what does not work for the customer. Vadakkepatt et al. (2020:2) recognise that retailers' financial performance is the prime focus, in terms of achieving targets and generating profits.

It emerged that the pure-players plan and budget to a great extent for operational costs such as couriers, returns and maintenance, while among hybrid retailers, campaigning and running promotions are extensively budgeted for, as seen in the statements below:

4:5 The biggest cost is your operational costs, specifically couriers so I (1766:1947) - D 4:
Company 2-PP1

The biggest cost is your operational costs, specifically couriers so I think that's something that's obviously with our new system migration the focus is to bring those costs down.

8:14 In order to run promotional activities does cost money, so one should (2714:2858) -
D 8: Company 3-PO2

In order to run promotional activities does cost money, so one should ensure that they use this money on the right product at the right time.

9:28 The budget for this area is not usually very big and can only be used (8024:8181) - D
9: Company 3-PO3

The budget for this area is not usually very big and can only be used for particular campaigns, so choosing the correct campaigns to drive sales are crucial.

Code Group Three: Organisational culture

Code group three explored the retailers' organisational culture, with two codes emerging in this code group. First, code one established the retailers' focus on quality assurance and customer service. Secondly, code two, related to code one, determined the interpersonal and leadership factors required – as depicted below in Figure 5.5.



Figure 5.5: Code Group 3

Code 1: Quality assurance and customer services

Quality assurance and customer experience remain one of the important CSFs highlighted in this study. Participants mentioned that they prioritise quality assurance in respect of online customer experience in order to retain their customers. Alam and Noor (2020:4) note the general increase in demand for organisations to provide quality services, suggesting that when the company has the right product accompanied by high-quality customer service, a customer is more likely to make use of the same service or product in the future. Quality customer service improves competitive advantage and helps retailers to distinguish themselves from their competitors (Alam & Noor, 2020:4). The notions of quality assurance and customer service are also tied to organisational culture due to their people-centredness. Below are some comments associated with this code:

1:3 Also a very important part or that's a critical to our success is as I (1724:1947) - D 1: Company 1-PP1

Also a very important part that's critical to our success is having the right product. A t-shirt is a right product, a jean is a right product, a shirt is the right product but having the right product

1:19 Yes, I do think so. Retail is really not for everyone it's really not. (8281:8515) - D 1: Company 1-PP1

Yes, I do think so. Retail is really not for everyone it's really not. It's demanding and ever changing. They never understand why there isn't a set system and that's because people are changing their mind daily. That's how we are also

1:34 Works toward that main goal, definitely. And we a mall, people should.....
(14824:15023) - D 1: Company 1-PP1

Works toward that main goal, definitely. And we a mall, people should start seeing us a mall and just an online retailer we have everything, it's just food we don't sell or cars but we sell everything

5:10 I think all companies should be following this. I think some companies (3017:3655) -
D 5: Company 2-PP2

I think all companies should be following this. I think some companies do lose sight and we did lose a little bit last year 2 years and we've honed back in again and it's about our top suppliers, it's about trading. So yes I think companies can lose sight you know the rapid growth we've seen in online is very easy to but it's always about knowing your business and taking a step back and competition is always good. Always good, because that's what is driving you day-to-day and it's not about being lazy and sitting back, it's about saying what can we do better and it's not about copying but what we can do better and who we stand for.

5:20 Teams, making sure teams are happy and if they are unhappy catching it
(6678:6906) - D 5: Company 2-PP2

Teams, making sure teams are happy and if they are unhappy catching it before they want to leave and finding out how we can solve it. Those are just normal company standards but things we look at and concentrate on the whole time

5:24 We have strategies set in the whole time. We've got white boards in every s
(7838:8052) - D 5: Company 2-PP2

We have strategies set in the whole time. We've got white boards in every single office. We are deep-diving we call it into everything so whether it's bad selling product you coming up with a plan of how to sell the stock

8:4 Good product offered across commodities including small value items and ensure you are in stock. (781:878) - D 8: Company 3-PO2

Good product offered across commodities including small value items and ensure you are in stock.

8:11 yes, long term growth plays a role in testing certain product types up (2052:2200) - D 8: Company 3-PO2

yes, long-term growth plays a role in testing certain product types upfront and being able to use that data to grow into more product opportunities.

8:12 Short-term growth is more focused on what drives your basic product turn (2202:2328) - D 8: Company 3-PO2

Short-term growth is more focused on what drives your basic product turnover and to maximize on those sales, i.e. stay in sizes.

Quality assurance with regard to how the item fits the customer has proved to be a make-or-break factor. The interviews also revealed that quality assurance is present throughout the firm's operational processes, and includes ensuring quality in decision-making, in predicting trends and products, and overall planning. Kochan and Turek (2020:1) confirm that product quality is essential in consumer decision-making, and that alongside price, quality is a vital aspect in the purchasing process. Cruz (2015:38) supports this finding by noting that product quality has the potential to increase retailers' bottom line and long-term revenue. Poor quality in the product culminates in customer returns and lost sales.

In turn, the way in which issues such as customer returns are dealt with determines whether customers will return. As a result, customer service helps the business to grow just as much any of the other departments. These things were mentioned by a small portion of participants, as seen below:

1:32 Yes, they are because we all follow a specific trend and speak the same..... (14103:14245) - D 1: Company 1-PP1

Yes, they are because we all follow a specific trend and speak the same language in terms of we want to be the best online retailer in Africa.

2:20 Understanding the quality, making sure it fits her so that's something.....
(8637:9043) - D 2: Company 1-PP2

Understanding the quality, making sure it fits her so that's something you end up spending a lot of money on returns, you end up spending a lot of money dealing with quality issues. It comes to her door and if it doesn't look like the way she thought it looked on the site. It's not an easy thing, she touched it she loved it and confidently bought it and by the time she goes home she's going to keep it.

5:8 t helps the business so much. If you got a buying team and purchasing (2446:2760) -
D 5: Company 2-PP2

t helps the business so much. If you got a buying team and purchasing team and customer service and finance that are all speaking the same language, its helping the business get to that next level. If you all on the same page and you're not just speaking about it to consumers and customer service when they call up

5:9 If you all on the same page and you're not just speaking about it to c (2644:2918) - D
5: Company 2-PP2

If you all on the same page and you're not just speaking about it to consumers and customer service when they call up but you also speaking to your suppliers and you showing them on the website through photography you getting that message across that you're a stable business

12:4 Product: If you don't anticipate the right trends, colours, sizes your (596:704) - D 12:
Company 4-PO3

Product: If you don't anticipate the right trends, colours, sizes your products will not appeal to the market

Code 2: Interpersonal and leadership

This code refers to the intrapersonal and interpersonal factors that are important for sustaining the business. Participants mentioned that aspects such as team dynamics need to be managed in order to ensure that operations keep going according to plan. Among the comments made by participants were the following:

6:27 Yes yes that's the biggest thing and you have to have strategies in place (12054:12265)
- D 4: Company 2-PP1

Yes, yes, that's the biggest thing and you have to have strategies in place. Planning is very important with proper timelines and action plans and responsibilities. That whole Irish management and chain management.

5:18 And you have your ups and downs and not everyone is meant to get on but (5539:5967) - D 5: Company 2-PP2

And you have your ups and downs and not everyone is meant to get on but it's about knowing how to work around it, we did an amazing course last year. It's a colour course of knowing what colours you are. There's four colours and each colour meant you were something. Yellow means creative, red is analytical and we keep these blocks on our desks so everyone in company is totally different and just knowing how to speak to someone.

11:3 Being able to make decision closer to when goods are meant to reach st (890:998) - D 11: Company 4-PO2

Being able to make decisions closer to when goods are meant to reach stores / online which are trend-relevant

The participant responses highlighted those characteristics such as genuineness and trustworthiness are essential to grow relationships and create a positive working environment. Establishing a dynamic and motivated personnel increases efficiency for these retailers.

5:2 Authenticity, honest with the supplier, having regular feedback from s (1717:1809) - D 5: Company 2-PP2

Authenticity, honest with the supplier, having regular feedback from suppliers and customers,

12:11 People development and retention (1996:2028) - D 12: Company 4-PO3

People development and retention

11:1 turn on product leadership teams that are on the same page. This allow (520:692) -
D 11: Company 4-PO2

turn on product leadership teams that are on the same page. This allows teams to make the necessary changes/decisions without having meetings which prolong decision making.

Code Group Four: Business model

Code groups four and five explored the CSFs at a strategic planning level, where the business plans that the e-tailers evolved and followed have resulted in operational success. There are two codes associated with this code group: code one enquired into the diversity of products that the e-tailers offer, while code two established the significance of operating as both pure-players and hybrid retails.

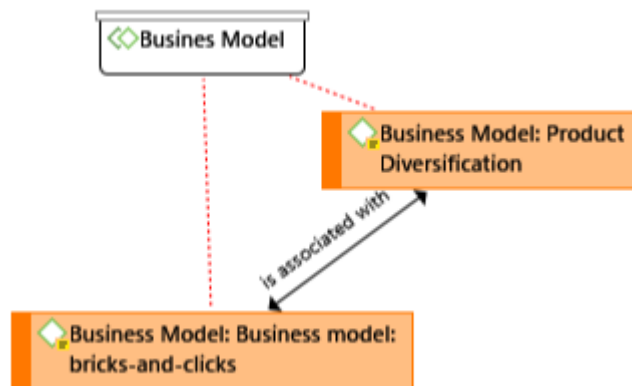


Figure 5.6: Code group 4

Code 1: Product diversification

The interviews established that one of the CSFs for apparel e-tailing points to the diversification of sales, which includes offering a wider variety of products and merchandise. Having a wider variety of products helps the companies not to have to rely on selling a single product but to have options in terms of their value propositions. Agardi and Alt (2015:4) emphasise the importance of expanding merchandise groups, which allows retailers to build and maintain

competitive advantage. Another aspect mentioned in this regard was the offering of well-known brands. The diversification of products and goods offered on the online website also assisted the company to be more competitive and have a stronger presence in terms of the online space. Furthermore, it was found that the advantages of a diversified product offering applied both to pure-players and to hybrid retailers. The comments below support this code:

1:16 All the time. All the time. That's one of our biggest things is, every (7495:7925) - D 1: Company 1-PP1

All the time. All the time. That's one of our biggest things is, every week we got to reinvent ourselves. Every day we have to. There's no use getting stock in and just say hey it's just going to keep going. No it's the same for trends. Trends change all the time. Three months from now it could be something else, you never know. We need to be open and keep reinventing ourselves, even just watching people and picking up trends.

2:1 With company one the advantage that we have is that we one of the only (218:877) - D 2: Company 1-PP2

With company one the advantage that we have is that we one of the only or one of the very few online retailers in South Africa that sells brands as well as private labels. So we have already got a reputation, there's already a brand identity that people know and understand so as far as shopping online in South Africa company one would be one of the first places you would go to that you would compare to any other retailer so if you were looking for something specific and you were going to go to that company four online or Zara online company one would be one of those retailers that you would consider as well as oppose to the smaller less fashionable brands

2:4 It helps us to achieve our targets and growth. Every business has targ (1253:1674) - D 2: Company 1-PP2

It helps us to achieve our targets and growth. Every business has targets that we need to try and achieve and with factors like having international well-known brands you have beauty, you have footwear, you have clothing, you have kids wear, you got furniture, homeware so you got a lot of categories that can help you to make up your

targets and you got in those categories well-known brands as well as home-grown brands.

2:5 No I think they are relevant for most retailers' growth and meeting target (1799:1870) - D 2: Company 1-PP2

No I think they are relevant for most retailers' growth and meeting targets

3:2 It's not only apparel that we offer, it's a lot of things, I mean we'd (803:947) - D 3: Company 1-PP3

It's not only apparel that we offer, it's a lot of things, I mean we do kids wear, womenswear, menswear and then we have Apartment and that's it.

4:1 Our biggest focus is to supply everybody, supply product for everybody (441:1128) - D 4: Company 2-PP1

Our biggest focus is to supply everybody, supply product for everybody and our goal is to be the biggest online business in South Africa. We are also part of the company two group which is the biggest e-commerce business in Africa and that has been part of our success as a business because the company two group is listed on the New York stock exchange so we have a big global presence and support although we only service Africa per say. It is really a global company and what benefits company two from this is because company two is the fashion segment of the big company two group but we are able to leverage off the groups systems for example operational costs and all those things that add costs to this business

4:9 They are critical to the business. I'll speak generically again not ju (3762:3999) - D 4: Company 2-PP1

They are critical to the business. I'll speak generically again, not just for company 2. Or do you want it to be company-2 specific because I worked at Spree before this and I worked at company 1 for 6 months. So I have an all-round e-commerce.

4:29 Yes yes. That is what it is. We refer to it as marketplace and we call (12922:13124) - D 4: Company 2-PP1

Yes yes. That is what it is. We refer to it as marketplace and we call it seller's centre, which is on a commission basis, and then we have the retail division which is what we invest in and own the stock.

5:1 For company two there's no limitation. It is about being a shopping mall of (1060:1574) - D 5: Company 2-PP2

For company 2 there's no limitation. It is about being a shopping mall of South Africa but online. So don't think of us as a brand you think of us as a Sandton, Mall of Africa, Canal Walk, Tyger Valley. We are a house of brands, we are limited when it comes to warehousing and certain products, we only are fashion so we haven't gone into food or alcohol or electronics at this stage but it is always something we can consider in the future depending on how we grow within the market. Company 2 is a fashion online website.

5:14 We are still quite baby company but we not the size of it and what I I (4161:4432) - D 5: Company 2-PP2

We are still quite a baby company but we are not the size of it and what I love about company 2 is everyone is an entrepreneur. If you've got an idea you can pitch it and that idea will be listened to. It can be validated and up and running before you know it and that was your idea.

5:28 It has to be. It absolutely has to be. We were listed last year on the (9521:9922) - D 5: Company 2-PP2

It has to be. It absolutely has to be. We were listed last year on the New York stock exchange so our strategy has had to change of how we operate as a company and that's constantly changing so you always relooking at your big numbers that are now available publicly. You always want to make sure you doing the right thing towards the investors so you always strategic planning, always reviewing it.

5:30 We have e-com as well. I'm not going to go with what was said in your (10155:10967) - D 5: Company 2-PP2

We have e-com as well. I'm not going to go with what was said in your interview yesterday. So e-com is a service that is very exciting where when I started 9 years

ago we would knock and bang on doors a people wouldn't open this door for us. Now people are coming to us can you set up our website, can you run it for us. So we running Adiddas.co.za, we run Aldo, we run Fox and we run Puma and we run Levi's. We hold the stock in our warehouse, we do all the interface of the website for them, we do their newsletters but nobody would know it, only us. So it's an extra service because that is where our skills are at because our skills are in I.T online business, website-driven, customer service driven and that is what we provide to brands so that's what is on top of what PP1 went through with you yesterday.

5:42 The view of brands have changed on how important e-tailing is and it do (15793:16316) - D 5: Company 2-PP2

The view of brands have changed on how important e-tailing is and it doesn't compete with brick n mortar but it gives them a new angle, it's a new flagship store for them so that's been interesting. For brands learning that they not just one set profile and for us knowing that we can have a Queens Park to an Adidas to a Sissy Boy. You have different people there all in one and your sizing is always changing, you can never be set because one size of a Sissy boy jean to a Levi's jean is different customers the whole time.

6:4 Yes, we try and go very wide with our products and our brands. We have (1565:1809) - D 6: Company 2-PP3

Yes, we try and go very wide with our products and our brands. We have everything from home to beauty to footwear and we want all the mass-market brands as well as our own and in terms of apparel for the whole family from infants to adult.

6:17 I think it's important to give the customer variety and from a profita (7245:7693) - D 6: Company 2-PP3

I think it's important to give the customer variety and from a profitability point of view because we don't own that stock we just basically are the in-between between the seller and the customer. It's a less risky version and it can drive profitability whereas with our own product we obviously buy that and we commit to it we don't sell that stock it comes at our cost. So I think in terms of a long term strategy they are equally as important.

8:7 Small value items is the perfect basket filler (this helps to maximize (1384:1553) - D 8: Company 3-PO2

Small value items are the perfect basket fillers (this helps to maximize the purchase)
This can also be linked to online marketing (i.e. buy for R500 and get free delivery)

8:8 To have sizes in stock allows you to maximize the buy as well as identify (1555:1657)
- D 8: Company 3-PO2

To have sizes in stock allows you to maximise the buy as well as identify the peak selling curve by size.

9:1 It is important to note that company three's group company takes pride in having a unique online (544:751) - D 9: Company 3-PO3

It is important to note that company three takes pride in having a unique online platform space with the likes of the introduction of the company three's offering online where all brands are brought together and are showcased.

12:8 Identifying "new" needs to be an iterative process (1504:1554) - D 12: Company 4-PO3

Identifying "new" needs to be an iterative process

12:16 Due to lockdown, there will be an aggressive increase in ecommerce in (3775:3997) - D 12: Company 4-PO3

Due to lockdown, there will be an aggressive increase in ecommerce in retail. Companies should gear themselves for rapid expansion (in a very short time) whilst still measuring up to the quality that their customers expect.

Code 2: Bricks-and-clicks

This code sought to establish the difference between the two types of e-tailers in terms of the key business model employed. The code refers to the profile of the companies that were interviewed in terms of bricks-and-clicks. The type of business model that a business follows should be operationally beneficial and a CSF. Some businesses are classified as purely online retailers while others are a hybrid of bricks and clicks (Goga et al., 2019).

The businesses that had a purely online approach relied on storage, warehouse and delivery systems, while the bricks companies relied on operational systems such as couriers, customer returns and maintenance. Rim  l   et al. (2021:16) concurs that due to the nature of e-commerce, high volumes of orders are placed daily, so operational decisions have to be made regularly. Companies that are characterised as bricks-and-clicks have an opportunity to reach a wider customer base because they can track their clientele profile and then use the information to feed into the marketing strategy and product supply.

1:33 We want to show the most variety we want to show the best prices, we w
(14246:14674) - D 1: Company 1-PP1

We want to show the most variety, we want to show the best prices, we want to show the most stylish way, we want to reach the junior guy, we want to reach the contemporary guy and lady and talk to the working class but we also want to talk to the mom. We say hey we got clothes for your kids but we got clothes for you as well so essentially the message we try to layout to our customers actually very simple. We are a shopping mall.

1:35 The one thing we should prepare ourselves for is we somehow need to br
(15137:15361) - D 1: Company 1-PP1

The one thing we should prepare ourselves for is we somehow need to break the culture of shopping on promos and markdowns. The reason I say that is because no business can survive just trading off sale stock, it's impossible.

1:38 We so good at identifying as online but I do see a potential for it ye (16583:16994) -
D 1: Company 1-PP1

We so good at identifying as online but I do see a potential for it yes. It may be a popup store concept to draw people in but the world is changing if bricks and mortar becomes the thing again then yes. Company 1 has to realistically look at it and say cool our license only allows us to go online but maybe realistically our license should expand to a bricks and mortar store. As I say, follow your customer.

2:17 For a very unpredictable and ever-changing environment and there's nothi
(8195:9042) - D 2: Company 1-PP2

For a very unpredictable and ever-changing environment and there's nothing that is set in stone. You can literally have the best strategy; you have people working on it 24/7 but it doesn't mean she's going to shop online. Online shopping has a lot of complexities because South African customers, even though they love the convenience they still do love to try things on, they love the experience of feeling the fabric, touching the fabric. Understanding the quality, making sure it fits her which is something you end up spending a lot of money on returns, you end up spending a lot of money dealing with quality issues. It comes to her door and if it doesn't look like the way she thought it looked on the site. It's not an easy thing, she touched it she loved it and confidently bought it and by the time she goes home she's going to keep it.

6:23 I think the more traditional brick and mortar stores you can bring online (9487:9913) - D 6: Company 2-PP3

I think the more traditional brick n mortar stores you can bring online that would also be a great way to go because realistically the south African customer does very much shop at the Truworths, Pep, Ackermans you know that's very much where they spend so if you can work on that side and bringing that online I think that's also huge but in terms of challenges I would say the logistics cost oh and one other important thing.

9:14 All online retailers need to remain relevant and be able to adjust to (4221:4500) - D 9: Company 3-PO3

All online retailers need to remain relevant and be able to adjust to the ever changing environment

Many brands are moving away from brick and mortar, which means that the online landscape is growing and all of the above assists in creating a comprehensive offering for consumers.

10:4 Presenting that product via multiple channels in a balanced way, in li (1071:1407) - D 10: Company 4-PO1

Presenting that product via multiple channels in a balanced way, in line with an Omni channel strategy is also key to high performance, e.g. lagging in online sales places pressure on bricks mortar selling locations. From an online perspective there has to be seamless integration between what is bought and how we choose to sell it.

12:14 A model that is very interconnected across all platforms. Stores and o (2654:2991) -
D 12: Company 4-PO3

A model that is very interconnected across all platforms. Stores and online need to speak to each other and online is enabled by our level of tech integration. The goal is to constantly attract new customers and retain existing customers by drawing them to the online store when they are unable or chose not to go to the physical store.

It was evident from the responses that bricks-and-clicks relies on strong transparency and interconnectedness between divisions and within processes. Jones and Livingstone (2015:236) corroborate this finding when they note that big retailers rely on transparency in store in order to sustain online sales, thus building on their multichannel strategy. The pure-players refer to their online store as an online “shopping mall”, whereas, brick-and-mortar retailers are concerned with creating and maintaining integration across all platforms.

Interviews suggest that the hybrid retailers are experiencing accelerated growth in their online stores: one participant mentioned that online has become their number one platform, as apparent from the following:

7:6 Long term growth definitely. We find that our online platform is actua (2743:3041) - D
7: Company 3-PO1

Long-term growth definitely. We find that our online platform is actually becoming the number one store compared to our 320 stores across the country and our online platform is number one so they make the most money compared to an actual physical store so this is definitely like a long term plan.

7:4 South Africa is very new in the online retail space. Similar for us i (2145:2394) - D 7:
Company 3-PO1

South Africa is very new in the online retail space. Similar for us I think we've been in the space for 4-5 year from an online perspective so we are learning and growing and because everything is going digital now we growing faster than we intended.

Code Group Five: Strategic modelling

Code group five concentrated on identifying the most critical components for success required by the retailers. The code group consisted of three codes: code one explored planning, communication and implementation processes, and is closely associated with code two, which focussed on short-term vs long-term planning. Lastly, code three was assigned to strategic partnerships with service providers. Figure 5.7 portrays the relationships among the codes:

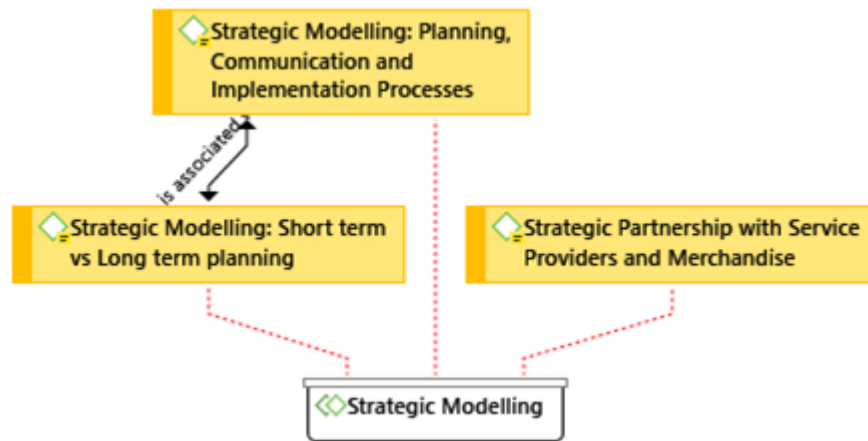


Figure 5.7: Code Group 5

Code 1: Planning, communication and implementation processes

Effective communication systems within the company are important for the survival of an e-tailing business. This code refers to the interaction of communication and interpersonal factors in the organisation. Participants mentioned that they use a systems approach to communicate their ideas and decisions. In other words, the strategic team would decide on various matters and then filter their decisions across all operational departments. Communication networks are formed between employees in an organisation, allowing individuals to interact formally and informally (Lai & Lin, 2017:6). Also mentioned in this regard were the leadership and interpersonal skills required to sustain change within the organisation and ensure constant communication across all departments.

1:32 Yes, they are because we all follow a specific trend and speak the same (14103:14245) - D 1: Company 1-PP1

Yes, they are because we all follow a specific trend and speak the same language in terms of wanting to be the best online retailer in Africa.

4:33 We try to. We try to communicate that as well as we can. Communication (13695:14040) - D 4: Company 2-PP1

We try to. We try to communicate that as well as we can. Communication in every environment is the most important thing. We try to filter that down from our CEO down to the assistant so that everybody has a common goal, a common vision everyone knows what they are working towards and it helps motivate people. It is something that is implemented.

6:20 Yes. It definitely is. We will have our top line business strategy and (8231:8448) - D 6: Company 2-PP3

Yes. It definitely is. We will have our top line business strategy and then with what that's based on which is profitability, customer first and all of that each department's own strategy will have to roll up into that.

9:4 Weekly reports are done by the merchandise teams in order to monitor p (1703:2122) - D 9: Company 3-PO3

Weekly reports are done by the merchandise teams in order to monitor performance, the same needs to be done via the e-commerce team with a weekly report feeding back on the areas of concern and the areas of success that the merchandise teams will work towards expanding on for the online landscape

These reports should include highlights that the business can use to make decisions going forward for the online offering

9:18 There is of course a marketing strategy that is identified at the begin (5487:6163) - D 9: Company 3-PO2

There is of course a marketing strategy that is identified at the beginning of the season and would then filter down to key strategy for online, stores, magazines etc.

The online landscape grows and changes as the demand from our consumers change new activities need to change or adapt. The same can be said for our competitors in the marketplace, as their directions changes and new deals launch, company three's brand will have to adapt in order to remain competitive in the marketplace.

Although it is important for a business to remain on the path that was agreed upon there are many environmental changes that take place that require adaptations and these activities will need to change.

10:1 Businesses need to identify a product position and then strategise on (469:781) - D
10: Company 4-PO1

Businesses need to identify a product position and then strategise on every level to meet their product position. This application of strategy applies to every area in the business. Successful competitive performance is dependent on selecting products and buying products in a way that meets customer requirements.

11:15 Yes, the strategy is fed down from executives to our leadership teams (3772:3934)
- D 11: Company 4-PO2

Yes, the strategy is fed down from executives to our leadership teams which we then use to deliver our strategy based on numbers, lessons learnt and based on trends.

Pure-players' strategic planning processes need to be slicker, and therefore planning, communication, decision making and implementation happen at a faster rate than in hybrid retailers. Additionally, the top managers in pure-play retailers are notably involved in day-to-day decision making, whereas there was no sign of this in the interviews with the hybrid retailers.

All the respondents alluded to the significance of a business strategy. Planning revolves around the strategy, and although each division's strategy may differ from the others, it still feeds into the broader main business strategy. The strategy is viewed as a way to measure performance although, as stated, the strategy is constantly changing and the business has to adjust.

5:26 very fast-paced, very fast-paced. Some people can handle and some people (8753:9241) - D 5: Company 2-PP2

very fast-paced, very fast-paced. Some people can handle and some people can't. We are a company that changes on a daily base. We might've been doing a strategy on whiteboards yesterday, tomorrow we going to be doing it on a PowerPoint presentation and you just need to flow with it. I find that so editing, you never sticking to one thing that you do year in and year out, people get bored with it. You are constantly adapting to what the people in the room need and what the company needs.

2:13 Yes, definitely. If the strategy is clear and you do not achieve what (5411:6075) - D

2: Company 1-PP2

Yes, definitely. If the strategy is clear and you do not achieve what you sought to achieve but you adhere to the strategy, then you know that the strategy was wrong. But if you have a strategy and along the way you didn't really adhere to it and did other things you never going to know if the strategy was right or wrong because you didn't really bother with it so for a business to be able to learn from its mistakes and to see opportunity and growth you definitely need to have had clear strategic processes that you know we did this to the best of our ability and if it doesn't work we know we need to change it. So yes definitely i think it's very important.

3:7 We improve all the time. Even the site, if you go on the site two week (2446:2580) - D

3: Company 1-PP3

We improve all the time. Even the site, if you go on the site two weeks back. A week, two weeks later they are changes that are there.

4:17 It's both. The thing with e-commerce is that the growth has been very (7240:8232) - D

4: Company 2-PP1

It's both. The thing with e-commerce is that the growth has been very high because it's fast growth but the thing with e-commerce is that it's retail on speed. We work at a different pace than a bricks business, example, there's a whole process and the six months and then they get signed off. We make decisions quickly, we have to because the difference between e-commerce and bricks is that it's all about right now, instant gratification got to make changes now. So short-term growth is just as important as long-term. You need to have that longevity, you need to be a profitable business,

most business are not profitable in the first five years, they only start showing profit after that so obviously long-term is very important because you want to be around but also short-term you got to make changes, you got to be able to nimble, that's very important and that's very different to bricks business. Some people don't like it, you got to be adaptive it's just the way it is you know.

4:30 It's critical. If you don't have a plan if you don't have a strategy (12644:12749) - D 4: Company 2-PP1

It's critical. If you don't have a plan if you don't have a strategy, then what are you working towards.

5:25 If it's a team restructure that we need to do and move people around t (8055:8715) - D 5: Company 2-PP2

If it's a team restructure that we need to do and move people around to shake it up let's get around a table what can we do. If it's a delivery situation where suppliers aren't able to get their goods into the warehouse because the flow is not right how can we fix that. It's an important supplier, let's give them a delivery slot. So we get around the table and we talk about this. It's a very open office policy here and it's a very communicative where you have your MD involved with all these discussions as well. So your idea or action can be signed off in that meeting so you don't have to wait another 2–3 weeks, a month, a season to get it anything done.

6:9 Quite frequently. We have experienced shifts in strategy as I mentioned (3207:3466) - D 6: Company 2-PP3

Quite frequently. We have experienced shifts in strategy as I mentioned just from expanding the business to now turning and focusing on profitability. In that comes and filters down to smaller departments strategies that all have to represent that big change.

7:15 Yes definitely. Most retail business models and business strategies are (7274:8109) - D 7: Company 3-PO1

Yes definitely. Most retail business models and business strategies are similar. We are enforced by a marketing plan and just above that, a strategy comes from the

board that filters down to senior management and they deliver it as a brand which ties back to the brand identity. This is what we going to go after and they build that business model from there and look at what we stand for and decide these three sports is what we will go after for the year and then a strategy is built around how it will be achieved. So what happens in stores must speak to the e-commerce platform so it becomes one. It is important because we have to work with one goal in mind which is enforced by the board and the board has a number that they have to reach and there's money that needs to be made. We are highly enforced by a strategic business model.

8:22 Yes, a business strategy is key to ensure you have set up your objecti (4084:4339) - D 8: Company 3-PO2

Yes, a business strategy is key to ensure you have set up your objectives and to work towards a goal/plan. Your business model, which is your action plan to make that money does change depending on trade. In short, if you can measure it, you can manage it.

10:3 High performance is dependent on defining a valid strategy and then im (919:1340) - D 10: Company 4-PO1

High performance is dependent on defining a valid strategy and then implementing that strategy through product procurement in a fully balanced manner. Presenting that product via multiple channels in a balanced way, in line with an omni channel strategy is also key to high performance, e.g. lagging in online sales places pressure on bricks mortar selling locations. From an online perspective there has to be seamless

10:5 Well-defined strategies give you targets to work to and measure yourself (1497:1688) - D 10: Company 4-PO2

Well-defined strategies give you targets to work to and measure yourself against. Based on how you achieve to strategies you can make adjustments to find better opportunities for the business.

10:15 Yes, a flawed strategic planning process will result in an organisation (4047:4175) - D 10: Company 4-PO1

Yes, a flawed strategic planning process will result in an organisation that has no clearly defined goals and subsequent measures.

11:13 Yes, it allows everyone to be aware of goals to work towards. With this (3078:3203)
- D 11: Company 4-PO2

Yes, it allows everyone to be aware of goals to work towards. With this comes certain business tools to be able to deliver it

Code 2: Short-term vs. long-term planning

Participants were asked whether they preferred to focus on short-term or long-term planning. The majority claimed that their companies tended to focus more on long-term strategic planning than short-term planning. The majority of the participants did however reveal that both short-term and long-term planning are done and are equally important. This code is linked to code one, planning, communication and implementation, as the responses below attest:

3:6 I'd say long-term because we need to build that reputation in the market (1996:2128) -
D 3: Company 1-PP3

I'd say long-term because we need to build that reputation in the market and it takes a while. It's long-term.

4:31: I could argue both of them. So when you refer to short term, would o (13335:13438)
- D 4: Company 2-PP1

I could argue both of them. So when you refer to short-term, would one year be a short-term strategy?

4:32 then short-term strategy. The market is changing so frequently. I woul (13475:13577)
- D 4: Company 2-PP1

then short-term strategy. The market is changing so frequently. I would go with a short-term strategy.

5:11 Long-term growth definitely. (3742:3771) - D 5: Company 2-PP2

Long-term growth definitely.

5:31 Short-term. It has to be shorter. Your long-term version absolutely is (11181:11442) - D 5: Company 2-PP2

Short-term. It has to be shorter. Your long-term vision absolutely is to be profitable but your short-term vision how do you get there as quickly as possible for the long-term version so you constantly doing short-term strategies. You have to nowadays adapt to different environments.

5:32 We moved warehouse last year and we've already outgrown the warehouse. (11444:11982) - D 5: Company 2-PP2

We moved warehouse last year and we've already outgrown the warehouse. We have become so big so it's constantly thinking what are those next steps and the reason why we've introduced marketplace is that we don't hold all the stock from brands. So we offer the full width to our customers but you not being held back on the space that you get because of the stock you can have so I then have to tell suppliers we can't have any more stock which is terrible so it's finding new ways. So short-term strategies you always putting into effect.

6:18 It's a bit of both, to be honest. You definitely need to review in the (7929:8111) - D 6: Company 2-PP3

It's a bit of both, to be honest. You definitely need to review in the short-term though in order to adjust accordingly. I would say more short-term, especially in a volatile economy.

8:10 yes, long-term growth plays a role in testing certain product types up (2052:2201) - D 8: Company 3-PO2

yes, long-term growth plays a role in testing certain product types upfront and being able to use that data to grow into more product opportunities.

8:24 I suggest the company has both. Long-term should be a 3 - 5-year top l..... (4976:5204) - D 8: Company 3-PO2

Targets are part of these retailers' ongoing short-term planning. They have daily, weekly, monthly, quarterly and yearly targets, which enable them to reach their long-term financial

targets. The comments below highlight that constant adjustments and reviews are made in the short term due to the nature of the industry. One of the most interesting comments was that the lockdown came as a surprise to many of the online retailers, and forced them to put fallback plans in place in case of it occurring again.

1:27 We do a lot of long-term planning but a lot of mid-term planning so from (12207:12702) - D 1: Company 1-PP1

We do a lot of long-term planning but a lot of mid-term planning so from a long-term point of view we have a five-year plan and a five-year goal that we need to get and mid-term is the financial year. So in order for us to get to the five-year plan, we need to make target in all five financial year ends and if we missing one, where will we make it up? and what strategies are we going to have. Are we going to do a Black Friday bigger or a group sale even bigger with the best marketing outreach?

1:28 In retail, I would say short-term but not short-term if that makes sense (12915:13187) - D 1: Company 1-PP1

In retail, I would say short-term but not short-term if that makes sense. Yes, the long-term goal is you want to be a billion or trillion-dollar company but we are also aware that we are dealing with people, so your short-term plan will change in order to reach the long-term goal.

7:17 The market is so fickle, it's a bit of both. I say long-term strategy (9421:9559) - D 7: Company 3-PO1

The market is so fickle, it's a bit of both. I say long-term strategy but you do have to be flexible so you can be reactive to the market.

I suggest the company has both. Long-term should be a 3–5-year top line plan/strategic intent.

Your short-term business model should be revisited every three months due to the nature of the business being so fast and ever changing.

10:13 In the short-term design future strategies in line with benchmark onli (3370:3697) -
D 10: Company 4-PO1

In the short-term design future strategies in line with benchmark online platforms who are leaders in the field of e-tailing, while taking forward trend in terms of the future of e-tailing into consideration. Be innovative, and in the long-term work to differentiate the business from the competition (local and international)

10:16 Organisations need both long-term and short-term strategies, Short-term(4550:4887) - D 10: Company 4-PO1

Organisations need both long-term and short-term strategies, Short-term strategies should sync with long-term strategies for alignment. This requires the organisation to be innovative and that plans are put in place for multiple outcomes.

a lockdown situation has caught many organisations off guard, speaks to company's risk plan

12:15 For online in particular, a short-term strategy would work best, and m (3219:3311) -
D 12: Company 4-PO3

For online in particular, a short-term strategy would work best, and must be revisited often

Code 3: Strategic partnership with service providers

The participants mentioned that they have strategic partnerships with service providers. These partnerships with external brands ensure that they receive stock and deliver goods on time. They also help the businesses to diversify and widen their product offerings, as seen in the statements below:

1:22 We have to have the relationship with the supplier to say can you hold (8986:9159) -
D 1: Company 1-PP1

We have to have the relationship with the supplier to say can you hold the stock for us for two months. Buying cross seasonality is tough, it's tough for us to do on our side.

5:7 If you all on the same page and you're not just speaking about it to c (2644:2920) - D
5: Company 2-PP2

If you all on the same page and you're not just speaking about it to consumers and customer service when they call up but you also speaking to your suppliers and you showing them on the website through photography you getting that message across that you're a stable business.

8:19 To ensure our key supply partners are set up to do quick response to (3541:3636) -
D 8: Company 3-PO2

To ensure our key supply partners are set up to do quick response to get goods online faster.

9:15 The above activities are relevant as being a leader in the online land (4502:4692) - D
9: Company 3-PO3

The above activities are relevant as being a leader in the online landscape requires key relationships with brands and the merchandise/buying teams to ensure the overall success of the online business.

The interviews revealed that products that are produced abroad – for example, in China – are ordered on the pure-player's online store, and the product is shipped directly from the manufacturer. In contrast, hybrid retailers have their merchandise shipped as one entire order and once the order has been received into the warehouse, the style is made available for customers to purchase online.

4:11 we don't only do local, we also do global so in other words you'll go (4837:5098) - D 4:
Company 2-PP1

we don't only do local, we also do global so in other words you'll go onto the website and you'll see a dress that you like and that'll be shipped from China so it'll say global takes 2 weeks for delivery so it's placed with a factory in China and they ship it.

9:11 A relationship between the merchandise teams and online teams, these t
(3419:3557) - D 9: Company 3-PO3

A relationship between the merchandise teams and online teams, these teams need to constantly be on the same page in terms of the end goal.

The interviews revealed that the pure-players have two different models for selling stock. The first model is referred to as “sellers’ centre”, “marketplace” or “e-comm”. This denotes a division where the online retailers do not own the stock sold on the website but receive a commission from the sales for showcasing a third party’s brands. All the stock is kept in the third-party brand’s warehouse and they oversee the entire ordering process. In this way, the e-tailer does not sit with thousands of units.

The second model is the “retail division”, which the retailers describe as their own “private label” or “in-house brand”. These products are designed and created from start to finish by the e-tailers’ own designers, buyers, quality controllers and managed by their own distribution division. A great deal of time and money is invested in these products to create a well-established brand.

4:25 It's about the retail segment about the brands that we invest and buy (11135:11313)
- D 4: Company 2-PP1

It's about the retail segment about the brands that we invest and buy and now we've got to sell it. With sellers centre we don't own that sock, we take a commission on the sales.

2:14 As online-only we sell third-party brands and that keep a lot of custo (6150:6443) - D
2: Company 1-PP2

As online-only we sell third-party brands and that keep a lot of customers coming and customers on the site and then we have our own private label which is where really the bulk of our investment goes but there's still new brands that need to be established in their own right so we do both.

It was evident from some of the responses that hybrid retailers also house external brands. These relationships are crucial for maintaining market competitiveness. The interviews revealed that in certain instances, the hybrid retailer purchases a quantity of merchandise from external brands and resells it under their name. With this type of business model, different supply chain agreements are met and the e-tailer functions as a marketplace (Goga et al., 2019:14).

1:25 we can go all out and show something fancy even though we know we wo
(9771:10074) - D 1: Company 1-PP1

we can go all out and show something fancy even though we know we won't sell any
of it so we might even collaborate with whoever AKA or a Virgil off white collab and
maybe only two people can afford it but the fact that it's on your site everyone wants
to shop on your site because we the cool brand.

7:10 From an internal perspective, it's just different things, we work with (4960:5375) - D
7: Company 3-PO1

From an internal perspective, it's just different things, we work with a lot of
stakeholders. So we work with a lot of brands that could hinder the process of how we
work. For example, if we wanted go after an Airmax launch, that could hinder if don't
have that product. Those are the internal factors that could hinder our progress that
could hinder the whole having the right product at the right time you know.

7:11 So they not able to send the product or the product arrives late so we (5500:5775) -
D 7: Company 3-PO1

*So they not able to send the product or the product arrives late so we are not relevant
with the rest of the market so for example Adidas launches their pure boost and we
not launching. We not relevant with the rest of the market so in turn that's definitely
hindering sales.*

9:2 The relationship with key brands within the South African market, these (763:1010) -
D 9: Company 3-PO3

The relationship with key brands within the South African market, these include
crucial relationships with Nike and Adidas, ensuring that TS as a business are privy to
key launches within the marketplace before/ alongside that of our competitors.

9:17 This results in us becoming a key partner with brands, in future ensur (5190:5371) -
D 9: Company 3-PO3

This results in us becoming a key partner with brands, in future ensuring that we are first in line for new product launches and the supporting media that comes with these launches.

9:21 As a business we have many brands, this often leads to a struggle when (6736:6949) - D 9: Company 3-PO3

As a business we have many brands, this often leads to a struggle when trying to showcase not only the brands that we have key relationships with but also the own brands team product (company three's branded product).

Summary of key findings for objective 1:

The findings for objective one derived from the code group "business intelligence". The profiling of customers was identified as an internet-based activity conducted to understand who the business is targeting and who it needs to target. Attracting the correct target groups increases traffic and therefore potential sales.

Secondly, managing product supply, demand and timing was seen as an integral process resulting in a customer purchasing an item and returning to purchase again. The correct mix of product, price and timing allows the e-tailer to remain relevant in the market. This is achieved through efficiency and clear communication across the entire business and throughout the supply chain.

The third CSF explored market research, innovation and adaption. Evidently, this CSF was a continuous endeavour aimed at identifying trends and ways of staying creatively ahead of competitors. A recurring theme was the need to adapt and embrace change, emphasised particularly by the purely online retailers.

The fourth CSF embraced pricing margins and profitability. This was viewed as the foundation for all the planning that takes place. The correct pricing of products is imperative in achieving margin and profitability. Consumers want value for money, especially when they are required to pay a delivery fee. Profitability can suffer because of an excess of items that go on mark-down.

The fifth CSF comprised product testing and monitoring. These are time-consuming functions, given that constant monitoring takes place before a product is sold, during the time it is on the market for sale and after it is sold. It was found that new trends are often tested by selling a

specific or risky item that might not necessarily sell well but might serve to indicate an emerging pattern or new configuration of customer groups. Products also go through a quality assurance process before they are sold, and revisiting how the product traded is monitored by having seasonal SWOT meetings as well as weekly trade meetings to check on how each style is currently trading.

The sixth CSF was marketing: advertising, promotions and the importance of a social media presence indicated that social media is an effective marketing tool to attract customers. Having a social media presence across various digital platforms drives the image of the business.

The seventh CSF explored brand identity, reputation and customer retention, and how crucial it is for the business to be unique and to protect its reputation. The key is to keep on improving customer service and provide an effortless online experience by building and maintaining a positive brand perception through customer service. Ledikwe (2020:15) also found that focusing on effective customer service secures the image of a brand.

The eighth CSF was explored under operations and focused on effective logistics operations. Both the pure-players and hybrid retailers heavily depend on efficient logistics. Delivery is the last step in the ordering process, and therefore inventory systems, warehousing and clear communication must be in place to ensure that the customer receives the correct product on time.

CSF nine refers to efficient e-tailing platforms, and includes an attractive and user-friendly website and efficient ordering systems for the e-tailer and the supplier. The findings revealed that the industry has no standard system to work on and needs more efficient and well-structured software to support e-stores. The website was key to creating a unique platform. The purely online retailers have become “self-service portals” for other brands, and most of the traffic on their websites is from mobile devices. IT also plays a pivotal role in creating the e-store and monitoring how customers perceive it.

The tenth and last CSF that forms part of operations comprises financial planning and budgeting. Budgets and sales determine the products for the next season. Budgets are planned and set for all operations that take place. For pure-players, couriers and customer returns loom largely, whereas hybrid retailers focus on social campaigning and advertising products and ranges.

The next CSF identified was organisational culture, and within organisational culture, quality assurance and customer services were explored. Quality assurance is the eleventh CSF, where it was found that quality products mixed with good customer service result in a people-orientated approach. Poor quality products lead to an increase in customer returns, which is costly for the business, and negatively affect the overall customer experience.

The twelfth CSF was interpersonal and leadership, which pointed to the need for a lively positive working environment. Each organisation has an open interpersonal culture, and this leads to efficiency and teamwork.

The last set of CSFs operated at a strategic level and pointed to a business model incorporating diverse product offerings. A wide product offering – consisting of an array of different products not only apparel but also homeware, accessories and many more – presents the customer with options and the e-tailer with a strong value proposition. A related CSF applied to another aspect of the type of business model adopted by the business. It was found that hybrid retailers consist of brick-and-mortar and online, while pure-players consist of two different divisions called “marketplace” and “retail division”. The findings confirmed that the way e-tailers decide to do business is a major CSF.

The next three CSFs were identified under strategic modelling and formed part of CSFs at the strategic level. The planning, communication and implementation process was observed to be critical at every level and in each department. Strategic decisions regarding planning, communication and implementation are filtered down from top-level management in a systematic manner which requires strong interpersonal skills. The findings suggested that CSF four pertains to strategies that should remain as long-term, although short-term planning is also imperative as it assists the business to adjust and manage change. Lastly, the fifth CSF explored strategic partnerships with service providers, a prevalent theme across all e-tailers. Forming and maintaining strong relationships with external brands and suppliers enables flexibility in terms of delivery, stock and any changes that need to be made during the development and manufacturing stages.

Code Group Six: Challenges

5.2.2. Objective 2: Establish the challenges that existing e-tailers are facing.

Figure 5.8 depicts the challenges that comprise code group six and all the codes associated with it. This code group is derived from objective two. There are five different codes within this code group: the first code identifies external challenges relating to local and international competitors, while the related code two explores the external challenge of government legislation and support. Code three is the last external challenge that centres on micro- and macro-economic issues. Codes four and five focused on internal challenges, with code four addressing staff retention and code five exploring inefficient online systems.

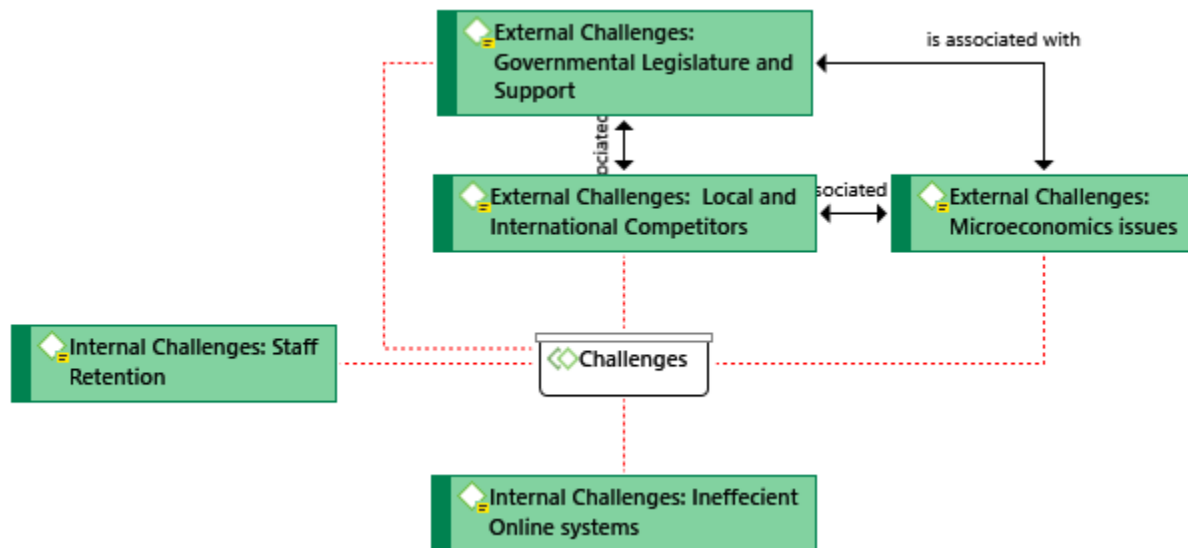


Figure 5.8: Code Group 6

Code 1: External Challenges: local and international competitors

The participants mentioned that they were affected by other retailers in the local and international markets. It appears that companies that have more financial resources have more access to markets and merchandise, while smaller retailers struggle to compete with large corporations. The inability to compete with large corporates is a challenge to emerging companies. Large corporates can dominate in the scaling of markets and are more visible in the online space.

3:5 They slightly different, before they merged with Spree I would say Spree (1733:1880)
- D 3: Company 1-PP3

They slightly different, before they merged with Spree I would say Spree was our competitor. So now they not our competitor because they one of us.

3:11 External is brick n mortar because they so big. If you look at Truwort (3596:3983) - D
3: Company 1-PP3

External is brick n mortar because they so big. If you look at another large South African retail they've been around for the longest time and company 3's group company has been around for the longest time so those are direct competitors even though the platforms are different but we sell Nike they sell Nike but they much bigger than we are and they've been around for much longer than we have been so that's our external challenge.

4:20 People just don't have money, they not spending money necessarily on I
(9612:10037) - D 4: Company 2-PP1

People just don't have money, they not spending money necessarily on luxury, people are focusing on rent, on food, on essentials. At the moment that is the biggest challenge and now the Coronavirus. I was meant to travel to China and how does it affect our June/July deliveries because winter is placed and winter is delivered in the country. What do we do now to make allowance for that so there are a lot of external factors.

4:34 It's difficult to get to a point where they are profitable and where e-tailing
(14152:14382) - D 4: Company 2-PP1

It's difficult to get to a point where they are profitable and where e-tailing is profitable. A lot of the big guys they not even breaking even yet on profit because of such high expenses but it is the way the world is moving towards.

4:35 There's always talk about the big guys coming to South Africa like Ama
(14430:14777) - D 4: Company 2-PP1

There's always talk about the big guys coming to South Africa like Amazon because there is a global threat as well because everything is so accessible. The world of technology the way it's down to your phone it's made the world a lot smaller so there will be a lot of global threat a lot of global competition. Yes, the big guys and globalisation

3:16 Even if you look at the handwriting, the Chinese product is much much (5818:6127) - D 3: Company 1-PP3

Even if you look at the handwriting, the Chinese product is much better than the stuff that is made locally. Before our local product was great but because the industry has almost died out, we don't have those good machinists that we had before. The government can intervene in that way but it's tricky.

4:11 we don't only do local, we also do global so in other words you'll go (4837:5098) - D 4: Company 2-PP1

we don't only do local, we also do global so in other words you'll go onto the website and you'll see a dress that you like and that'll be shipped from China so it'll say global takes 2 weeks for delivery so it's placed with a factory in China and they ship it.

3:18 It benefits them even for quick turnaround time because it's around the (6165:6440) - D 3: Company 1-PP3

It benefits them even for quick turnaround time because it's around the corner but then the challenge is the fabric mills. We have no fabric mills which means they still getting the fabrics from China. So if the duties were higher on imports, it would force us to buy locally.

The following statements indicate additional concerns that, although online retailing is still in a growth phase in South Africa, the competition is a constant challenge in terms of what is being sold and product deals such as “buy one get one free”. Clearly, if their competitors' offerings are more appealing, they threaten the position of the retailer. These retailers are highly protective of their market share and for that reason it is important always to be aware of what competitors are offering.

3:4 They relevant for most online stores because if you look at ASOS, they (1552:1687) -
D 3: Company 1-PP3

They relevant for most online stores because if you look at ASOS, they use a similar methodology. Company two they not exactly the same as us

4:19 External challenges are always what you competitors are doing. That's (9384:9609) -
D 4: Company 2-PP1

External challenges are always what you competitors are doing. That's the biggest challenge. For us it's mainly with Company 1 who's our biggest fashion competitor besides our competitors the biggest challenge is the economy.

7:5 So most of these factors I mentioned are very relevant and relevant to (2396:2655) -
D 7: Company 3-PO1

So most of these factors I mentioned are very relevant and relevant to most competitors. We also look to each other to see who's doing what and what are they doing better than us so I think it is relevant to our self and other online companies in South Africa.

9:20 Competitors and the launch of their deals online, many competitors are (6590:6723)
- D 9: Company 3-PO3

Competitors and the launch of their deals online, many competitors are often offered online exclusives which puts company 3 at a disadvantage

10:11 Competition in terms of offer, (3055:3084) - D 10: Company 4-PO1

Competition in terms of offering

12:10 External includes new competitors or offerings that encroach/threaten (1770:1855) -
D 12: Company 4-PO3

External includes new competitors or offerings that encroach/threaten your positioning

Code 2: Governmental legislation and support

One of the challenges raised by the participants was the lack of support from the Government in terms of legislation and other considerations. Socioeconomic factors such as consumers' limited disposable income affects their spending power and has an impact on the business. In relation to apparel production, suggestions were made about subsidising local manufacturers, implementing a special tax or increasing import duties to discourage the industry from buying from international manufacturers. The desire to support local manufacturers is clear from the statements quoted below:

1:26 I do think to agree, they do especially it comes to specifically private

(10161:11973) - D 1: Company 1-PP1

I do think to agree, they do especially it comes to specifically private label because that's where you can gain a lot of margins because you get to control the price, you get to control the units and the product but in saying that, in our economy and in our country at the moment we do not have enough factories to be able to produce to the level of China or Mauritius, we can't even compete with them at a pricing level so we got a lot of good small suppliers but they cannot produce to that level and the execution and also, I feel like the unions have a lot of power over it and also a little bit of a monopoly. And it's not always to the advantage of the people working, it more to their advantage so we lose a lot of business because of that. I mean, it's an industry that South Africa has the potential to be one of the biggest because we have the factories, we've got the space, we've got the skilled labour for it but from a cost point of view it doesn't make sense and that's where the government could really step in and say okay cool, if you open up a factory and you give 500 people a job, we will pay for at least 150 of those or assist you in paying for those people, or give you a special tax and all those. I think that will come a long way and assist you in maybe shipping in fabrics, opening vertical supply chains here. We'd get a lot more business, the world is looking at Africa and they just like damn these guys are blowing up but there's nothing we can get from them because our country is so locked by our government so you look at the latest Gucci show, its African inspired, a lot of the brands, that's where they play. We have a lot of restrictions, it's the same as the diamond concept, we dig for diamonds and sell it to America only for them to sell it back to us. It's ridiculous.

2:12 I don't think it relates to online specifically. Where government is c (4700:5270) - D 2: Company 1-PP2

I don't think it relates to online specifically. Where government is concerned it would have to do with, maybe some sort of subsidising when it comes to local manufacturing and manufacturing locally. What the government could do is invest more money in local production, local factories, helping people with funding that want to start factories, want to create employment and I think that's something the government would focus on in terms of support and investment and growth then it makes it easier for retailers to bring the business back home. Produce more locally.

7:14 No. Our ways of working and our processes are pretty much above board (6568:7131) - D 7: Company 3-PO1

No. Our ways of working and our processes are pretty much above board like with any online space there are rules and regulations and limitations and restrictions so we stick to those because we do work for a very big company we can't break the rules. The government really no. So what company 3 does is that they create jobs by creating work, creating work by opening our own company 3 factory and then employ people to just curb this whole unemployment thing and then the government gives us an incentive for doing that. That is the only way that the government is involved.

1:27 They could yes. Remember if they increase duties on product that (10161:11966) - D 1: Company 1-PP3

They could yes. Remember if they increase import duties on product that comes from China or wherever. That will force retailers to manufacture locally because it would be cheaper to manufacture locally than it is to import. At this point in time even though we import from China it takes about 40 days, it is still cheaper to manufacture there including the shipping costs than it is to manufacture locally. Even if you look at the quality or handwriting of the goods, the Chinese product is much better than the stuff that is made locally. Before our local product was great but because the industry has almost died out, we don't have those good machinists that we had before. The government can intervene in that way but it's tricky.

9:22 It benefits them even for quick turnaround time because it's around the (10161:11979) - D 1: Company 1-PP3

It benefits them even for quick turnaround time because it's around the corner but then the challenge is the fabric mills. We have no fabric mills which means they still getting the fabrics from China. So if the duties were higher on imports, it would force us to buy locally.

Another challenge raised was the issue of improving network infrastructure to enable more people to have access to data. This directly impacts online retailers and customers who want to shop online but are not able to. Its overall impact on the online shopping industry warrants support from the government.

6:15 We actually quite small in the scheme of it all. I suppose data costs (5883:6397) - D 6: Company 2-PP3

We actually quite small in the scheme of it all. I suppose data costs, if there could be some regulation there because I should've mentioned the cost of data in South Africa is so high and for most of the population that can't just afford to shop online all the time because the data is so expensive and it's set by those big three mobile providers so if the government could regulate that price better or make Wi-Fi more readily available or something that would definitely help in terms of the actual e-com retailers.

9:32 No intervention is required, but government could assist in improving (8717:8818) - D 9: Company 3-PO3

No intervention is required, but government could assist in improving people's access to the internet.

12:13 No, except for relevant legislation such as Protection of Personal Inf (2242:2326) - D 12: Company 4-PO3

No, except for relevant legislation such as Protection of Personal Information (POPI)

Code 3: External Challenges: microeconomic & macroeconomic issues

The macroeconomic issue of South Africa's weak economy was a recurring concern for respondents. It has a direct bearing on the markets and thus affects companies involved in retail. Socio-economic factors like poverty, unemployment and income have an immediate impact on product choice, demand, supply, pricing and price margins. In some cases,

customers are reluctant to spend money on certain goods due to decreased disposable income and factors such as inadequate living conditions. Economic factors also affect operational costs and the ability of the company to diversify its products. Some of the statements quoted below also reveal that delivery costs deter people from purchasing online, and that Covid-19 has had a negative impact on the markets and consumer behaviour.

1:20 External challenge for us is always, in South Africa is the rand. The (8556:8850) - D
1: Company 1-PP1

External challenge for us is always, in South Africa is the rand. The rand is not the strongest, so we up against high pricing. We up against suppliers who demand a minimum order quantity when realistically we only sell much less. How do we juggle that and that's where we step in to negotiate.

2:8 I think that customers are becoming a lot more money-wise and money ti (2985:3434)
- D 2: Company 1-PP2

I think that customers are becoming a lot more money-wise and money-tight and they not spending as freely because they have other priorities and all South African economic issues that we have. People not having confidence in just spending money frivolously on fashion or luxury products so that's the biggest challenge that we have is that you can literally do it all right you can tick all your boxes but you can't make the sale happen you know.

3:12 Yes and no because you get retailers that do well regardless of what t.....
(4149:4261) - D 3: Company 1-PP3

Yes, and no because you get retailers that do well regardless of what the economy is. So how do you justify that?

3:13 Yes but then we can't say it's the economy. Let's say our target is a (4354:4627) - D
3: Company 1-PP3

Yes, but then we can't say it's the economy. Let's say our target is a particular percentage and you not achieving that we can't go back and say we didn't achieve this target because of the economy but they can say hang on, Truworths achieved their target in the same economy

4:34 It's difficult to get to a point where they are profitable and where e-tail (14152:14382)
- D 4: Company 2-PP1

It's difficult to get to a point where they are profitable and where e-tailing is profitable. A lot of the big guys are not even breaking even yet because of such high expenses but it is the way the world is moving towards.

4:35 There's always talk about the big guys coming to South Africa like Amazon (14430:14777) - D 4: Company 2-PP1

There's always talk about the big guys coming to South Africa like Amazon because there is a global threat as well because everything is so accessible. The world of technology the way it's down to your phone it's made the world a lot smaller so there will be a lot of global threat a lot of global competition. Yes, on the big guys and globalisation

5:21 External, external is the economy. You've got competitors going after (6909:7480) -
D 5: Company 2-PP2

External, external is the economy. You've got competitors going after market share not protecting the brand and they discounting the whole time and not following that pattern because it's not sustainable. So it's knowing what's happening externally and adjusting. So economy is in a bad situation so let's look at our pricing structure. Do we have that right entry price point to your premium price point, do we need to lower it, must we start offering more bundles, do we need to offer people more bundles as like packs to buy into so it makes it easier for the customer?

5:37 Our market is very interesting in e-tailing because it's growing very (13296:13413) -
D 5: Company 2-PP2

Our market is very interesting in e-tailing because it's growing very quickly but at a much slower pace than overseas.

5:38 We have restrictions such as data, so a lot of our traffic is on mobile (13415:13937) -
D 5: Company 2-PP2

We have restrictions such as data, so a lot of our traffic is on mobile. 65% of our traffic comes from mobile phones. So if data is lowered and the cost that we have to pay for it imagine how much more activity you can get on e-tailing. Things like that that can help us in the future, people getting more accessible to mobile phones, it's all about smart phones and understanding how they work. It's not just about the retailer it's actually about how you're adapting the apps, the mobile desktop function on the website.

6:10 Just in terms of day-to-day. And then it would be now that our holding (3709:3940) -
D 6: Company 2-PP3

Just in terms of day-to-day. And then it would be now that our holding company is listed on the stock exchange they obviously have a lot more they determine our sales target and so it's sort of high pressure from that point of view.

6:11 From an external point of view definitely the state of the South Africa (3942:4464) - D
6: Company 2-PP3

From an external point of view definitely the state of the South African economy as it is. It would definitely affect all retailers big and small. I mean we in a recession as of today, they've confirmed it, it puts so much pressure on the customer and there's only so much spending available and if that just gets smaller and smaller we all fighting for that same customer base and it's shrinking so definitely that. Also if petrol goes up and if the electricity goes up then that's when people.

6:12 Our costs go up but we need to try and keep the costs down to maintain (4529:4878)
- D 6: Company 2-PP3

Our costs go up but we need to try and keep the costs down to maintain a value proposition for the customer so we try and push back on our suppliers but they are also faced with the exact same constraints. Then you have load shedding that's comes into it which affects their productivity so everybody is hurt by it all throughout the supply chain.

6:22 The ever-increasing cost of logistics with the fuel spend and all of t (8718:9358) - D
6: Company 2-PP3

The ever-increasing cost of logistics with the fuel spend and all of that goes up. Obviously we don't have stores so we don't have those overheads but our biggest cost is our warehousing then our sending it out to customers and courier costs. So that is a huge challenge and then the best is to try and overcome that if we don't have any control over the fuel prices ourselves is to try and drive the basket size that a customer spends. So obviously it costs us a lot of money if the customer buys something for R100 or R150, especially to get it delivered to them, so if we can sell R1000/R2000 at a time it's a lot more profitable.

6:25 In this particular economy where everybody's discretionary income is (10369:10851)
- D 6: Company 2-PP3

In this particular economy where everybody's discretionary income is just shrinking it is very difficult I mean it comes back to getting the right product at the right price from the beginning and driving that value proposition so that people are willing actually pay full price for this. I mean if your competitors are doing it, it's not sustainable in the long-term so it should shift but it's just to get that right product that a customer wants to buy off the bat at full price.

7:4 South Africa is very new in the online retail space. Similar for us I (2145:2394) - D 7:
Company 3-PO1

South Africa is very new in the online retail space. Similar for us I think we've been in the space for 4-5 year from an online perspective so we are learning and growing and because everything is going digital now we growing faster than we intended.

7:9 External is very easy. External is an example now is how a lot of e-co (4354:4958) - D
7: Company 3-PO1

External is very easy. External is an example now is how a lot of e-commerce retailers in SA are finding out how to get product in for example now we have Coronavirus. So from a product perspective you can't have an e-commerce platform without product and where does your product come from, it comes from China or Mauritius or wherever. So you basically can't trade, that means your online platform can become non-existent or could lose sales. I don't think it will be that bad but we

could lose sales. So those types of external challenges are not only for other retailers in South Africa but for ourselves.

8:16 External - SA is a third world country making the accessibility to sho (3189:3312) - D 8: Company 3-PO2

External - SA is a third world country making the accessibility to shop online for some very difficult or not even possible.

9:19 The first is of course the Covid-19 virus It is not business as usual (6329:6578) - D 9: Company 3-PO3

The first is of course the Covid-19 virus.

It is not business as usual for any retailer whether online or brick and mortar, all online brands have had to adapt to new laws that have been established and have had to find ways to still remain relevant.

9:22 Often people stray away from online purchasing as there is a delivery (6961:7132) - D 9: Company 3-PO3

Often people stray away from online purchasing as there is a delivery fee required, and this is usually only mitigated when we ask consumers to spend over a certain amount.

11:7 Other external factor is the economy and currently Covid_19. (2070:2128) - D 11: Company 4-PO2

Other external factor is the economy and currently Covid_19.

A change in consumer behaviour affects purchasing patterns and therefore impacts sales. The responses indicate that these online retailers recognise that they are still growing and learning – as businesses but also as an industry at large – and expect to encounter micro- and macroeconomic challenges.

Code 4: Internal Challenges: inefficient online systems

One of the internal challenges identified was inefficient online systems that are used for e-tailing. Some of the participants mentioned that they were still using old systems which rely mainly on Excel spread sheets and manual record keeping. These systems can be inefficient in terms of the speed of the ordering, capturing and delivering processes. Some participants mentioned that they were migrating to new systems which would allow them to process orders and manage the inventory system more efficiently. It was clear from interviews that online retailers as a whole in South Africa, but especially pure-play retailers, have no standardised system or program to work on. The absence of a standard system of control leads to inaccuracy and inefficiency. With a suitable system in place, every employee works from the same point of reference, regardless of the department s/he is in.

Participant 1 from company 2 mentioned that one standardised system is essential to “Sustain the growth... Also when you are listed on the stock exchange you have to have one version of the truth really”.

4:21 Internal challenges are constant and ongoing like in every area. This (10038:10248)
- D 4: Company 2-PP1

Internal challenges are constant and on-going like in every area. This migration for example is a major internal challenge because what is interesting about e-commerce there's no real IT program for e-commerce.

4:23 here's nothing for e-commerce, everything is very manual. We base our (10410:10857) - D 4: Company 2-PP1

Here's nothing for e-commerce, everything is very manual. We base our whole strategies and planning on excel spread sheets so that's a massive challenge because it allows for a lot of human error but you'll find company 1 is the same, Spree was the same. It's not consistent, it's not efficient. This is part of the migration we having at the moment so having to develop the current system from company 2's group to include things like planning and reporting.

5:19 Internal, we just recently become a very big company and we've had to (6104:6675)
- D 5: Company 2-PP2

Internal, we just recently become a very big company and we've had to do a system migration and the reason for a system migration was to get us to the next step of

being a huge company. Everything was very much Excel-based before, systems were not talking to each other and now going forward it's going to be much better so that currently is being an internal challenge but before that internal challenges were more from a discounting side trying to be profitable, looking after your brands, making sure you don't lose any brands because they upset with how we handle them

8:15 Internal - technology and systems processes is our biggest challenge a (3011:3188) - D 8: Company 3-PO2

Internal - technology and systems processes is our biggest challenge as we do not have the proper structure to support the amount of online goods fast and accurate enough.

9:24 Converting the older consumer that is afraid of data security when pur (7323:7515) - D 9: Company 3-PO3

Converting the older consumer that is afraid of data security when purchasing online.

This is an ongoing process to ensure that all consumers feel as though their personal information is secure

9:25 Showcasing all product, online unfortunately becomes an area where a p (7528:7651) - D 9: Company 3-PO3

Showcasing all products online unfortunately becomes an area where a plethora of products are available (sale and full price).

9:26 Showcasing all product, online unfortunately becomes an area where a p (7527:7849) - D 9: Company 3-PO3

Showcasing all products online unfortunately becomes an area where a plethora of products are available (sale and full price). The difficulty is creating an environment that is easy for the consumer to shop, where the consumer can easily find the product they are looking for whilst getting rid of the older product online.

10:9 internal challenges to online include: poor product offers and poor pl (2586:3032) - D 10: Company 4-PO1

Internal challenges to online include poor product offers and poor platform positioning. How the product is positioned on the platform is within company control, e.g. listing style and colour level images on the product listing page, how the platform is set up, ease of accessing what is wanted (e.g. shop by size in footwear). Internally we would also control things like, ease of selection and basket creation, order fill rate, speed of delivery,

10:12 usability of the site, shopping experience on the site, and then check (3086:3229) - D 10: Company 4-PO1

Usability of the site, shopping experience on the site, and then checkout, safety of the site, return policy, return location, delivery options.

Code 5: Internal Challenges: Staff Retention

Staff retention is among the challenges identified in this study, the ability to attract and retain the right staff. Some companies lose staff or are forced to downsize. Staff turnover has a negative impact on the operations of the business.

1:17 From an internal point of view there will always be issues with staff (8054:8184) - D 1: Company 1-PP1

From an internal point of view there will always be issues with staff turnover. Retail in general has a very high staff turnover.

2:10 It's people, it's staff retention I think it's like all business at the (3788:4193) - D 2: Company 1-PP2

It's people, it's staff retention I think it's like all business at the moment. Its finding the right people to do the job. Making sure people are happy. Online is a new business so it's not an established business with processes that are set in stone. So the challenge often is finding ways for people to feel you know comfortable and motivated even though they in an environment that's quite unpredictable

5:13 It can come from someone in warehouse having an idea of how they pick (3930:4074) - D 5: Company 2-PP2

It can come from someone in warehouse having an idea of how they pick and pack products to someone in HR getting new idea of how to hire someone.

5:17 It's so important you know we don't just hire someone, we do asymmetric (5282:5537) - D 5: Company 2-PP2

It's so important you know we don't just hire someone, we do asymmetrical testing, we have about four interviews. It's about not just knowing your job but fitting in with the team. Team is so important. You spend more time with your team than with your family.

11:10 Reduce the amount of executives/high level leadership teams – this can (2448:2536) - D 11: Company 4-PO2

Reduce the amount of executives/high level leadership teams – this can streamline things.

12:9 Internal includes capacity of the workforce to produce/develop (1707:1769) - D 12: Company 4-PO3

Internal includes capacity of the workforce to produce/develop

5:26 very fast-paced, very fast-paced. Some people can handle and some people (8753:9241) - D 5: Company 2-PP2

Very fast-paced, very fast-paced. Some people can handle and some people can't. We are a company that changes on a daily base. We might've been doing a strategy on whiteboards yesterday, tomorrow we going to be doing it on a PowerPoint presentation and you just need to flow with it. I find that so editing, you never sticking to one thing that you do year in and year out, people get bored with it. You constantly adapting to what the people in the room need and what the company needs.

It was evident that a low retention rate is a result of the dynamic nature of the retail environment. Constant changes in decision-making within departments have proved to be a major contributor to the high turnover rates that e-tailers are experiencing. A participant mentioned that “*online is a new business so it's not an established business with processes*”. In other words, this type of business is still developing and growing, and as a consequence, the

fast-paced working environment and lack of standard processes and procedures make it hard for employees to adjust and feel a sense of stability (Kamarulzaman et al., 2015:900). Both efficiency and adjustability are imperative whilst working in the online space. Some e-tailers conduct asymmetrical tests on all candidates while recruiting for new positions, which ultimately serves to reduce staff turnover.

Summary of key findings for objective 2:

Table 3: A summary of the challenges encountered by apparel e-tailers

Internal/external challenge	Type of challenge encountered
External	Competing with international & local online retailers
External	The lack of government support in the industry
External	Poor state of the economy
External	Navigating Covid-19
Internal	The absence of an internal e-tailing system for pure-players
Internal	High staff turnover

The challenges the e-tailers face were divided into internal and external challenges, most of which were common to all. Identifying the challenges helped to characterise the business environment in which the e-tailers are operating.

Each challenge and strategy will be further discussed below.

Objective two addressed the challenges that e-tailers encounter. The first challenge was an external one: how large local and international competitors dominate the market in terms of product offerings and appealing deals on their merchandise. Larger e-tailers are a constant threat to local online retailers still trying to grow their market share. This situation is consistent with Mulajkar and Prakesh's (2015:4) finding that large e-tailers adopt a vigorous mergers and acquisitions strategy (M&A), in order to diversify their product offering by acquiring e-tailers that specialise in specific products.

Findings revealed that the industry perceives a lack of urgently-needed government support for the local apparel and fabric manufacturing industries. The state also needs to free up access to data or wifi to enable more people to use the internet and shop online. Mkhosi (2017:2) supports this finding by pointing out that South Africa's lack of access to infrastructure and low-cost broadband is a result of South Africa's having the highest data costs in Africa. The government also seems to lack the ability to manage the regulations and taxes surrounding external funds and the tracking thereof.

Thirdly, micro and macroeconomic challenges such as high unemployment rates, increasing levels of crime and many others always need to be taken into consideration. Economic factors affect all the decisions made, from the number of styles in a range to the supply chain. The findings indicate that even though these retailers operate online, navigating Covid-19 has been an unexpected challenge in terms of changes in consumers' shopping behaviour during the pandemic, navigating a lockdown when imports were prohibited and lastly, mitigating department budget cuts. Öven and Hicintuka (2020:1) contextualise this finding by mentioning that large companies and institutions decreased projections and lowered forecasts, as stock prices plummeted. Most significantly, China's global economic and manufacturing contributions in retail goods were also heavily impacted (Öven & Hicintuka, 2020:2).

According to the responses from the purely online retail participants, the lack of a standard industry online system was resulting in internal inefficiency. The purpose of an e-tailer system is to track, increase visibility and continuously monitor styles or products in real-time. Fani et al.

(2021:2) substantiate this finding when they point out that the main purpose of fashion retail companies implementing an internal software-based system is to increase efficiency. In order fully to reap the benefits, well-structured implementation plans and processes need to be put in place beforehand to ensure that the entire business gains exposure and understanding.

The last internal challenge is presented by low staff retention rates, which impact the day-to-day operations of the business. The findings suggest that not all individuals are suited to the e-tailing working context, where they are required constantly to adjust and perform in a fast-paced environment. The interviews revealed that regulated business processes and procedures are a necessity to assist employees in adapting to their environment. This finding is consistent with Verburg et al.'s (2017:199) discovery that carefully controlled systems and processes promote employee engagement in the workplace, as well as boost their trust in and performance for the retailer.

5.2.3 Objective 3: Ascertain a plan of action that e-tailers can implement to face these challenges

The strategies proposed below were derived from participants' views on the types of strategic decisions that can be implemented to combat the challenges their organisations are facing. They are represented in Figure 5.9, below.

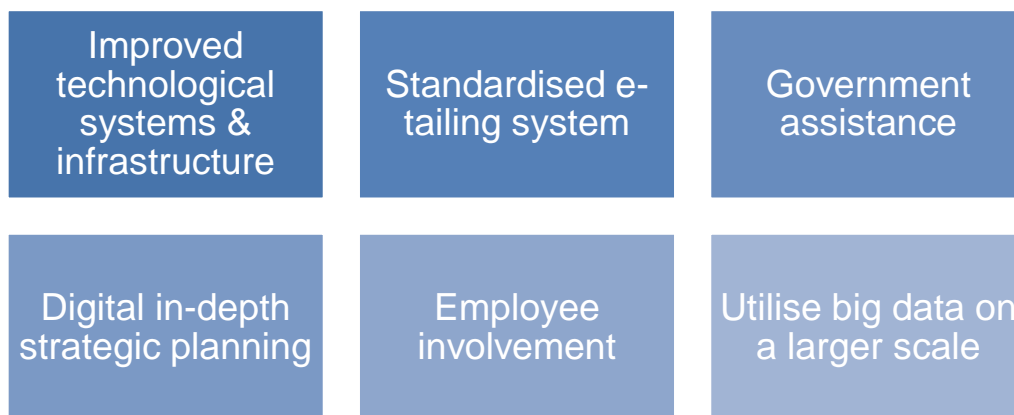


Figure 5.9: Potential strategies to overcome challenges

It was found that the industry requires support in terms of more advanced technological infrastructure, and a standardised merchandise system to be put in place for the entire industry

to increase coherence and overall productivity. Exploring big data on a larger scale to understand the customer base in more detail can assist in narrowing target groups when advertising for a specific audience.

Government has the ability to assist the industry by imposing import tariffs to restrict the huge volume of goods being imported. The introduction of (stricter) tariffs will protect emerging local suppliers and drive retailers to support and rebuild local South African suppliers. It emerged in the interviews that Covid-19 has compelled online retailers to build a speedy and resilient supply chain by utilising local suppliers. Participant 4 from company 3 mentioned that “*the movement towards locally made goods is great to boost local manufacturing*”, which will result in shorter lead times and a simplified merchandise cycle for retailers. As participant 1 from company 1 noted, “*lead times play a big role*” in the overall success of e-commerce.

Another strategic move would be to ensure plans are put into place with realistic dates and assigned responsibilities given to individuals. It was found the e-tailing organisations are team-driven, so assigning more distinct roles and activities would permit employees to perform with a purpose and be more accountable in their roles. Teams can also be rearranged based on employees’ skills, creativity and the task at hand.

In-depth digital planning is another strategy that involves reflecting on and learning about each product sold, while making sure that the business remains in line with its value proposition. The planning process could be made more efficient by going fully digital, for example by creating and working from digital range plans and digital design technologies. The participants views regarding the above presented in the comments that follow:

4:27 Yes, yes that's the biggest thing and you have to have strategies in pl (12054:12265)
- D 4: Company 2-PP1

Yes, yes that's the biggest thing and you have to have strategies in place. Planning is very important with proper timelines and action plans and responsibilities. That whole Irish management and chain management.

5:24 We have strategies set in place the whole time. We've got white boards in every s (7838:8052) - D 5: Company 2-PP2

We have strategies set in place the whole time. We've got white boards in every single office. We are deep-diving we call it into everything so whether its bad selling product you coming up with a plan of how to sell the stock

6:14 if we adding a little more to the customer so that the product has l (5221:5677) - D 6: Company 2-PP3

If we adding a little more to the customer so that the product has longevity or we focus on our brands that we know customers will buy into regardless the big sport brands. So it's just protecting and maintaining the value proposition, being extremely critical of products and brands that we do bring in and keeping it simple and focusing on what is going to actually drive profitability for us. There is no room for extra product or anything like that.

7:13 we have a marketing calendar that enforces our strategy so we know June (6066:6480) - D 7: Company 3-PO1

we have a marketing calendar that enforces our strategy so we know June is going to be sale, December will be a sale so we know winter is coming and summer is coming and that is not going to change. Our agility is one thing that keeps us on our toes and keeps us relevant to our customer so we don't have a specific strategy our strategy is being enforced and being quick and being able to turn around thing quite quickly.

8:17 proper infrastructure to support all technology aspects pertaining to (3453:3540) - D 8: Company 3-PO2

Proper infrastructure to support all technology aspects pertaining to online shopping.

8:21 To ensure we maximize sales and to use that data to re-apply test oppo (3638:3718) - D 8: Company 3-PO2

To ensure we maximise sales and to use that data to re-apply test opportunities

8:19 To ensure our key supplier partners are set up to do quick response to (3541:3636) - D 8: Company 3-PO2

To ensure our key supplier partners are set up to do quick responses to get goods online faster.

9:31 Currently the more users online then the slower the system, harder it (8363:8594) -
D 9: Company 3-PO3

Currently the more users online then the slower the system, harder it becomes for customers to complete transactions, need to improve online space to accommodate the volumes

8:27 The key to ensure a successful online retailer is to have the technology (5873:5980)
- D 8: Company 3-PO2

The key to ensure a successful online retailer is to have the technology and info structure to support it.

– Faster replenishment systems for out of stock

10:13 In the short-term design future strategies in line with benchmark onli (3370:3697) -
D 10: Company 4-PO1

In the short-term design future strategies in line with benchmark online platforms who are leaders in the field of e-tailing, while incorporating trends in terms of the future of e-tailing into consideration. Be innovative, and in the long-term work to differentiate the business from the competition (local and international)

11:11 Ways of working can always be improved and to find new ways – digitally (2538:2678) - D 11: Company 4-PO2

Ways of working can always be improved and to find new ways – digitally to range build/present ranges. This can allow things to move faster

11:9 Ensuring that we are clear on who our customer is & strategy in order (2359:2445) -
D 11: Company 4-PO2

Ensuring that we are clear on who our customer is & strategy in order for us to execute

12:11 People development and retention (1996:2028) - D 12: Company 4-PO3

People development and retention

12:12 Constant market scanning for new opportunities: adopt a test and rollo (2029:2130)
 - D 12: Company 4-PO3

Constant market scanning for new opportunities: adopt a test and rollout approach to new technologies

3:20 When the future comes you don't know what is going to happen, you prep (7675:8130) - D 3: Company 1-PP3

When the future comes you don't know what is going to happen, you prepare as much as you want but it hit you by surprise so company's permanent motto is we are on permanent beta so we never ever relax, we always on the lookout for new ideas we always looking out for fresh things so we never get to a point where we say we have arrived. We never arrive, we are constantly growing and learning and implementing new things so that is our not so secret strategy.

Summary of key findings for objective 3:

Table 4: A summary of the potential strategies to overcome the challenges

Internal/external challenge	Type of challenge	Strategies to overcome challenge
External	Competing with international & local online retailers	Diversify product offering
External	Navigating Covid-19	Strategies and remain flexible
External	Poor state of the economy	Strategies and remain flexible
External	The lack of government support in the industry	Government to review industry taxes, import duties, access to data and network infrastructure
Internal	The absence of an internal e-	Develop an efficient software package for

tailing system for pure-players pure-players

Internal

High staff turnover

Increase employee involvement and consider in-depth digital planning in all divisions

Objective three explored strategies that can be put in place to mitigate the challenges the businesses are experiencing. It was found that overall, as online retailers, diversifying the products offered to consumers are key in long-term expansion and growth. Various product categories and deep assortments increase value to its customers and overall revenue for the e-tailer, increasing market competitiveness.

Government support is required in the industry in terms of making data more accessible and implementing certain regulations such as increasing the duties on import goods to curb retailers from placing orders exclusively with international suppliers.

To decrease inefficiency, a standardised industry system needs to be developed for pure-players. Eliminating manual administration procedures would enhance productivity and by restricting the possibility of human error.

Greater employee involvement could incentivise employees. Sharma et al. (2019:144) concur but conclude that in order to develop positive staff who are willing to engage fully, certain aspects should be taken into account such as age, work experience, gender and employee position. Providing an environment conducive to growth and development, building employee skills and enhancing company culture are additional strategies that can prevent staff turnover.

Another strategy would see e-tailers implementing more digitised methods of working that could improve planning, design, buying and many other functions that are still performed manually. Participant 2 from company 4 noted that fashion buyers and designers could “*digitally range build / present ranges*”, whereas current range building involves manually selecting styles which are grouped into different retail categories or store levels. This process is time-consuming and would be more effective if carried out digitally.

For challenges that exist in the external environment such as competing with international & local online retailers and the poor state of the economy, participants mentioned that it is

fundamental for the organisation to develop and implement strategies and remain flexible “so you can be reactive to the market” and “look what’s going on around you”. The need to develop and integrate long-term strategies as goals for the organisation to work toward achieving was emphasised, but also having them in place as a safeguard during times of uncertainty are strategies that the e-tailers implement to overcome these challenges.

Finally, Alexander and Mason (2017:19) agree with the finding that capitalising on big data can accelerate growth for e-tailers as it forms a crucial role in e-tailing intelligence and innovation. Participant 2 from company 3 stated that they need “*proper infrastructure to support all technology aspects*”, hence integrating digitised systems and programmes to enhance efficiency should be applied to all departments, internal processes and stages in consumer online shopping. Jain (2020:4) agrees that big data creates opportunities and assists in simplifying supply chain issues, helping online retailers to secure sustainability.

5.3. Chapter Summary

This chapter explored the findings emerging from the data analysis process. The chapter also sought to fulfil the study’s three research objectives in relation to the literature surveyed in Chapter Three. Analysis of the findings achieved the following three objectives:

- Identify and explain the critical success factors of leading apparel e-tailers in South Africa
- Establish the challenges existing e-tailers are facing
- Ascertain a plan of action that e-tailers can implement to face these challenges.

The findings indicate that there are a number of pivotal CSFs in the success of an apparel e-tailer in South Africa. In total, sixteen CSFs were identified, of which eleven were classified as foundational to the business and five as strategic. The majority of the CSFs identified were connected to the technological aspect of the business, which falls under business intelligence. The other CSF groups were operations and organisational culture. The business model and strategic modelling were grouped at a strategic level.

Both internal and external challenges were encountered, some of which were common to all the e-tailers. A strategic approach disclosed several paths of potential progress, including the involvement of government, in-depth digital planning with staff, exploiting technological

resources and others. It is recommended that all e-tailers grasp the business benefit of categorising CSFs at different organisational levels in order to capitalise on the advantages that CSFs can confer. Although CSFs appear to vary from company to company because of different business models and types of trade conducted, CSFs can usefully be generalised and grouped accordingly.

CHAPTER SIX: CONCLUSIONS AND RECOMMENDATIONS

The main research objective of this study was to establish the CSFs for leading apparel e-tailers in South Africa. The previous chapter provided analysis and interpretation of the study's findings. The aim of this chapter is to present the conclusions drawn from the analysis, with the aim answering all four research questions. Certain recommendations will ensue.

The focal concepts or themes presented were derived from the interviews with participants. As previously stated, open-ended interview questions were designed and asked of all participants during face-to-face interviews and via email. Some of the findings discussed in this chapter are again underpinned by quotations from participants' interviews.

Finally, one of the research objectives was to develop what the researcher believes to be an effective growth and development framework that can be used for e-tailers entering the market. This framework will be discussed in detail, whereafter the chapter will close with some consideration of its contribution and limitations, and suggestions for further research.

6.1 Overview of the study

The previous chapters in this research study provided some background for South Africa's apparel e-tailing industry. As a researcher and an individual who works in the apparel retail industry, I observed a notable research problem: that no distinct set of CSFs has been formulated for apparel e-tailers to be sustainable and successful. The study reviewed the existing literature relating to e-tailing and CSFs, developing and utilising an open systems theory which revealed that apparel e-tailers do not operate in isolation and are influenced by a range of factors in the external environment (Chikere & Nwoka, 2015:3).

To solve the research problem, the researcher adopted an interpretive approach and a qualitative research methodology. Participants were selected through purposive sampling and open-ended interviews were conducted with them. The resultant data was subjected to content analysis using Atlas.ti software.

The findings established that the CSFs identified can be grouped into two categories, those needed to create a foundation for success and those required at a top-level management or strategic level. The selected e-tailers all experienced internal and external challenges, and appropriate strategies were identified to overcome these.

The findings assisted in the development of a proposed e-tailing framework that, it is hoped, will be able to support the endeavours of e-tailers in the retail environment. The participants' feedback together with the review of e-tailing literature amounts to a useful resource in this field.

6.2 Achievement of the research objectives

This final chapter sums up key points made in the study by revisiting the five research objectives. The e-tailing framework, conclusions and recommendations will be drawn from the findings.

6.2.1. Objective 1: The CSFs for leading apparel e-tailers in South Africa

The first CSF identified pertains to business intelligence, which informs a business's strategy and enables it to gain insight into its customers. The e-tailers surveyed place the customer at the centre of all their decisions, with market research and customer profiling enabling them to target their customers. Through market research, businesses can make informed innovative decisions to drive and sustain the originality of their brand (Hassan & Tabasum, 2020:25). These e-tailers rely on innovation, and the findings reveal that product testing is vital in promoting innovation and building a unique brand. Al-Ali, Sisodia, Gupta and Venu-gopalan (2021:5) agree with the finding, adding that innovation should always be explored and exploited businesses.

During the interviews, pure-players were found to be highly motivated by innovation and by creating a personalised approach to reach the customer. Given the nature of the environment, pure-players are more accommodating of change and more flexible in implementing different strategies. Hybrid retailers have the brick-and-mortar channel that limits their flexibility, which is consistent with Reinartz et al.'s description of brick-and-mortar as "stationary retail", whereas pure-players "are able to experience dynamic growth" (2019:351). To remain competitive, "you do have to be flexible so you can be reactive to the market" (participant 7, quoted above).

Marketing products on social media platforms proved to give the product digital appeal. It can also improve customer loyalty and trust (cf. Ismail, 2017:131) and further develop brand individuality.

Effective logistics is a CSF enabled by a real-time inventory system used in the warehouse and across suppliers forming an integral part of the e-tailer's operations. Although the literature notes that hybrid retailers are limited in terms of brick-and-mortar space, company 4 was found

to have experienced such an increase in demand for online products that they now have a warehouse specifically dedicated to online.

The design, layout, functionality and user-friendliness of the website concerned were found to be key differentiators, corroborating Xu et al.'s (2017:154) finding that an effective website and judicious use of software are fundamental factors for e-tailer success. It was established that the IT department plays a crucial role in determining how people view the online store on various devices, thus showing that a sophisticated and reliable IT capacity is a pre-requisite for e-tailers. Singa, Pelaez-Diaz, Perez-Falcon and KP (2021:1194) concurs with this finding highlighting that IT has enhanced value generated from products, minimised bottlenecks, assist in accurately reporting sales and reducing lead times.

The pure-players in this study plan and budget in the first instance for operational costs such as couriers, customer returns and overall maintenance, whereas, the hybrid retailers emphasised the significance of campaigning and running promotions (cf. Rimélé et al., 2021:16). Although all the e-tailers emphasised the need for quality products, making available a quality product is closely associated with quality customer service. Conversely, the findings indicated that poor quality products lead to more customer returns, which increases operational costs. This is in line with Cruz's (2015:38) contention that sufficiently good product quality can increase long-term revenue for e-tailers.

The CSFs identified at a strategic organisational level indicated that a business model that presents a diversified offering increases a business's value proposition. The findings revealed that pure-players view themselves as an online "shopping mall" offering a wide variety of products. They derive income from two sources, identified as "marketplace" and the "retail division". This echoes Oliver's (2018:23) findings on that e-marketplaces can provide a platform for a number of different vendors to sell their goods, providing the e-tailer with several sources of income. According to the literature, pure-players operate using the B2C model, however, the findings show that they operate as B2B as well. Hybrid retailers on the other hand, are concerned with maintaining integration across all channels and deriving revenue from their brick-and-mortars and their online store. They also sell goods online that are not available in stores, in this way diversifying and increasing their offerings.

The CSFs associated with strategic modelling highlight the significance of effective communication throughout the business. A systems approach is driven by top-line decisions

which filter down to the various departments. The business strategy is seen both as a baseline in terms of which all employees can work towards achieving their departmental and individual objectives, and as a tool to measure performance. This endorses Weber and Waeger's (2017:888) finding that effective communication can be integrated through implementing a systems approach. The e-tailers in this study confirmed that strategies should be developed to guide the business in the long term, yet short-term strategies are essential to enable the business to adjust to change and achieve short-term targets along the way. To form and maintain partnerships with suppliers and stakeholders also proved to be essential for the business to thrive and grow, so these relationships need to be nurtured and sustained. This finding was consistent with the conclusion of Teller et al. (2016:14) that the ability to manage supplier relationships has a direct positive relationship on the e-tailer's supply chain. The study revealed that certain pure-players have built such strong partnerships with their stakeholders and suppliers that products sold in their e-stores are prepared and couriered directly from the supplier to the customer, resulting in the elimination of inessential stock in the warehouse and increased efficiency. Biggemann and Buttle (2021:6) confirms that healthy stakeholder relationships improves planning, reduces risk, enhance competitiveness and allows the business to respond to market demands quicker and more efficiently.

The CSFs identified at a strategic organisational level indicated that a business model aimed at presenting a diversified offering increases the business's value proposition, though this can be complicated by whether the e-tailer decides to compete as a hybrid or purely online retailer.

6.2.2 Objective 2: The challenges encountered by e-tailers

6.2.2.1 The literature reviewed identified numerous challenges that e-tailers encounter. South African apparel e-tailers are additionally challenged by international competition and the technological demands of managing their platform. As Goga et al. (2019) and South Africa (2019) have highlighted, South Africa's online apparel industry is still in its growth phase, and slick, more experienced international competition poses a major threat to local e-tailers. This finding concurs with Saxena et al. (2018:293), that large e-tailers pose a major threat to all retailers by acquiring substantial amounts of market share.

6.2.2.2 During data collection for this study, South Africa's Covid-19 cases began to rise and the country's first official lockdown was imposed. Participants described the pandemic as an unanticipated challenge that they were still experiencing. As a consequence of lock-down, the

country endured border closures, e-tailers were confronted with diminishing departmental budgets and having to adapt to new consumer behaviours. Although the pandemic brought with it challenges, simultaneously, participants noted, “there will be a huge increase in e-tailing due to lockdown ... lockdown would have forced more people into e-tailing”. Furthermore, “due to lockdown, there will be an aggressive increase in e-commerce in retail. Companies should gear themselves for rapid expansion (in a very short time) whilst still measuring up to the quality that their customers expect”. This finding endorses the finding of Bhatti et al. (2020:1451), that e-commerce sales have increased as a result of the pandemic and that continued growth is expected.

6.2.2.3 The other challenge identified pertains specifically to the negative state of the South African economy and the associated impact on business. Factors mentioned included trading in a recession, constant hikes in the price of petrol, increases in the price of electricity, and the effect of load shedding on local manufacturers, which affects operational costs for businesses. A concomitant macroeconomic barrier is the low disposable income of consumers, which affects their spending power. The poor state of the economy is out of the businesses’ control although, at a strategic level, decisions should be made on how to manage and direct the business. Ajmal et al. (2017:161) also concluded that macroeconomic barriers have an impact on online retailers’ performance and ability to trade.

6.2.2.4 The findings show that although government has launched initiatives to grow the industry, it still requires support in terms of building adequate digital infrastructures to support online shopping, as well as reducing data costs, which would make online shopping more accessible. This concurs with Mkhosi’s (2017:19) findings relating to poor communication infrastructure in South Africa. It was also found that the current legislation on apparel import taxes and tariffs should be reassessed. Government assistance in these areas would help grow the industry by aiding local apparel suppliers. Direct subvention of local manufacturing would also have a welcome impact, Goga and Paelo (2019:15) agrees with the above finding that government regulation and policies impact the growth of online retailers.

6.2.2.5 An internal challenge for pure-players is the absence of an industry-wide IT system. This situation has arisen as a result of apparel pure-players trading as new businesses that are continually growing and developing. South African hybrid retailers were found to be utilising a software system known as the Product Lifecycle Management (PLM) system, created specifically for the fashion industry to efficiently manage products from development stage to

service. The system provides for employees to be assigned lead times to complete a job, which improves performance and promotes accountability. The researcher's former and current employers have adopted this software in recent years to streamline all business operations, suggesting that a similar system could be developed for purely online retailers.

6.2.2.6 The last and most common challenge amongst online retailers is their experience with high staff turnover. According to one participant, "From an internal point of view there will always be issues with staff turnover. Retail in general has a very high staff turnover". Conversely, participants from purely online retailers believe that because "online is a new business it's not an established business with processes that are set in stone. So the challenge often is finding ways for people to feel ... comfortable and motivated, even though they in an environment that's quite unpredictable". Olubiyi et al. (2019:2) corroborate that high staff turnover becomes remarkably costly for organisations as a consequence of the time and expense of recruitment and training.

6.2.3 Objective 3: A plan of action that e-tailers can implement to face the challenges

The findings show that key strategies can be put in place to overcome the internal and external challenges mentioned in the study. The findings indicated that by diversifying the products offered, increases value to customers while increasing revenue and profitability for the organisation. A diversified offering attracts customers and helps to differentiate through product offering, increasing gain market share and gaining competitive advantage. Shaturaev (2022:51) study's finding coincides with this finding elucidating that product diversification increases revenue and identifies new directions for development.

In terms of long-term survival, it was found that long-term strategies are developed to guide the business in the right direction as well as to protect and help mitigate the effects of unexpected occurrences in the external environment. The strategies are strategically identified at specific points in time to ensure sustainability of the organisations business model, filtering down to each department within the organisation.

Industry taxes, import duties and network/data infrastructure and accessibility are factors that were found to hinder business processes, however relooking at current policies and regulations surrounding these matters, could benefit how e-tailers are allowed to trade. Lastly, it was discovered that pure-players are lacking an internal system that can enhance efficiency and

improve overall work processes, therefore the implementation of such a system should be considered.

6.3 Recommendations of the study

6.3.1 Recommendations based on the CSFs identified in the study

6.3.1.1 The main research question that this study sought to explore involved identifying the CSFs of leading apparel e-tailers. The study was guided by Rockart's (1979) approach to CSFs, which recognises a hierarchy of CSFs at different organisational levels. The CSFs on which this study focuses may be defined as key structural CSFs. It was evident from the interviews that the participants had a strong sense of their businesses' strategic plans. Previous research has argued that CSFs should be based on business strategy, and that it is essential for e-tailers to establish and understand the strategic direction of their business (Yuliansyah et al.,2017:57; Tsironis et al.,2017:876). Participants highlighted the significance of identifying CSFs at different organisational levels in order to "ensure that we follow a consistent strategy, that we don't lose sight of what is the most important".

6.3.1.2 A second key insight is that all the e-tailers work according to a retail-focused strategy of having the right product, at the right price, entering the market at the right time. This set of factors was embedded in all the organisations' strategic plans, bearing out the finding of Pogorelov et al. (2016:6758) regarding the importance of product and price in the marketing mix in e-commerce. Jacobs (2018:111) has suggested that, given its seasonal and fashion-oriented nature, the 'right time' is just as significant for apparel e-tailers, forming part of what the retail industry refers to as the "rights" in the industry. Overall, by identifying CSFs, apparel e-tailers are able to achieve each element of the price, product and time mix. If existing CSFs do not result in attaining the right product, at the right price and at the right time, then the CSFs need to be altered to align with the business's strategic objectives.

6.3.1.3 It is the recommendation of this study that well defined CSFs be viewed as distinctive strategies that are put in place to ensure the business receives a return on investment (ROI) (cf. Goga et al., 2019:1). A great deal of time, money and planning is devoted to the development of strategies. The formulation of apposite CSFs should enable everyone competitively to benchmark their performance. It is essential for e-tailers to use CSFs in all areas to help the business adjust to change and make alternative plans if necessary. Though certain divisions might require more extensive planning and resources, CSFs help to keep the business focused

on what really matters: “they ensure that we follow a consistent strategy, that we don’t lose sight of what is the most important” (participant six). In reality, the CSFs identified in the study would require e-tailers to adapt or grow to be in line with the business’s goals and needs.

6.3.2 Recommendations based on the challenges encountered by e-tailers and how key strategies can help to mitigate these challenges

6.3.2.1. Participants claimed that to overcome market competition one must prepare and develop long-term strategies, though Wang et al. (2005) note that attaining competitiveness can involve other factors. These include enhancing their differentiation through the quality of their products, effective logistics and extensive advertising, which has a major influence on customer perceptions of the brand. Additionally, “to give the customer variety” has also been shown to improve competitive advantage. The focal recommendation by participants is that e-tailers should “be innovative, and in the long-term work to differentiate the business from the competition (local and international)”. These strategies are fully endorsed by this study.

6.3.2.2 Covid-19 has made e-tailers realise the importance of working with local manufacturers and suppliers. The fact that the most of their products are imported has resulted in major losses for e-tailers as a result of the lockdown. Clearly, the pandemic was an unexpected occurrence, but it should drive the business to prepare and put strategies in place to cope with its possible recurrence. Xu et al. (2020:161) suggest that such mitigation plans should be developed to respond to such emergencies, especially regarding the supply chains. Since the “lockdown situation has caught many organisations off guard”, it is the recommendation of this study that internal and external mitigation strategies are designed and risk assessments performed to deal with various situations that may arise in relation to business operations and supply chains.

The participants recognised that “there is a lot to learn about what the customer is shopping since the consumer is stuck indoors during Covid19 shutdown”. The pandemic has enabled online retailers to better understand their customers’ preferences, in spite of the overall negative effect the pandemic has had on the South African economy. As suggested above, as a result of the lockdown, the country’s borders were closed and all imports, including apparel, were suspended. This served to reveal the extent to which the industry depends on international clothing manufacturers. A key insight among participants regarding clothing production is the importance of “the movement towards locally made ... to boost local manufacturing”, and the need to “produce more locally”. It is a recommendation of this study that apparel e-tailers should

set a benchmark regarding the number of local suppliers that are on board across the organisation. This will enable e-tailers to measure and maintain their support for and compliancy towards local clothing suppliers. They will be able to build an efficient supply chain made up of local suppliers and achieving shorter turnaround times for apparel items.

One of the ongoing challenges identified in this study was the negative state of the economy. A focal recommendation from participants was the need to “be flexible so you can be reactive to the market”. Factors such as high unemployment rates, rising poverty and decreasing consumer spending are all challenges encountered by the e-tailers in this study. As a result, their recommendation is “to constantly be moving with the times and be moveable and flexible and look at what’s going on around you”. To limit the damage caused by unexpected occurrences, PEST analysis is beneficial, as this type of environmental scanning enables e-tailers to remain responsive to market changes (Hans, 2018:67). The e-tailers characterised their basic strategy as “being agile and being quick and being able to turn around things quite quickly”.

6.3.2.3 In a technologically-driven industry, maintaining flexibility and openness to innovation is essential: “Very often, as an e-commerce or digital who works in the digital retail space you have to remain innovative all the time. You have to look for new ways on how to approach your strategy and how to approach your digital platform”. It is evident that innovation is embedded in the e-tailers’ values as necessary to keep them competitive: “we have to constantly look at new ways to innovate and test new product types to win market share”. It was therefore established through this research study that to overcome challenges and adapt to changing market trends, e-tailers should remain pliable and integrate innovation in all business practices. This approach should be embedded throughout every facet of the organisation.

6.3.2.4 Some participants recognised that the South African government “can intervene” by making changes to legislation surrounding import taxes and duties on apparel items. Other strategies recommended by the participants include: “Some sort of subsidising when it comes to manufacturing and manufacturing locally. What the government could do is invest more money in local production, local factories, helping people with funding that want to start factories, want to create employment and I think that’s something the government would focus on”. The government could assist local manufacturers by implementing a special tax break for those factories that are producing locally made apparel and employing South African citizens: “I think that will come a long way and assist you in maybe shipping in fabrics, opening vertical supply chains here”.

6.3.2.5 It was also suggested that “the government gives us an incentive” for opening local factories and creating employment, thus encouraging e-tailers to establish their own local factories. The research also found that participants believe that “Our country is so locked by our government” and that “We have a lot of restrictions”. Recommendations made by the participants are that if changes can be made to grow local investments and support the growth of local business, it will be “easier for retailers to bring the business back home. Produce more locally”.

6.3.2.6 Another key finding was the perception that the government needs to improve network infrastructure nationwide. More accessible Wi-Fi, improved network connections and affordable data rates will enable more South Africans to access the internet and shop online. “The cost of data in South Africa is so high and for most of the population that can’t just afford to shop online all the time because the data is so expensive and it’s set by those big three mobile providers so if the government could regulate that price better or make Wi-Fi more readily available or something that would definitely help in terms of the actual e-com retailers”. Assistance in this regard will contribute to the growth of e-tailers and encourage South Africans to support local e-tailers.

In summary, it is the finding of this research study that the industry requires the South African government to consider the following:

- Reassess current import tariffs on fully made garments, apparel and fabrics.
- Support the apparel and manufacturing sector by implementing special taxes and subsidies to those local manufacturers – Cut, Make and Trim (CMTs) – supplying local retailers and employing a number of South African citizens.
- Reward and incentivise businesses for supporting local manufacturers and creating employment.
- Relook at reducing data prices.

6.3.2.7 It was discovered that pure-players are lacking “one standardised system and that was actually necessary to sustain growth”. There appears to be a need to work towards developing a standardised merchandise and management system for pure-players to increase their efficiency. Implementing a system could enable all employees to access all stock details, to

share, add information and make amendments in real-time. A suitable system could further encourage employees to complete tasks according to deadlines, thereby increasing efficiency across the business. Participants from pure-players declared that “everything is very manual”, with a resultant susceptibility to error and “conflicting reports”.

Avolio et al. (2015:5) support the implementation of a standardised model similar to PLM. Avolio et al. (2015) identified five fashion retailers that adopted the PLM system to standardise processes, to plan, design and share product information. There is a shortage of standard lifecycle systems available for organisations (Kozma et al., 2021:2). Kozma et al. (2021:24) conclude that Industry 4.0 should be integrated into developing new systems; however, components of industry 4.0 are still undergoing standardisation, requiring further analysis and testing. Existing models include PLM, which is currently used by omnichannel retailers. A standardised e-tailing system for pure-players is required to “Sustain the growth... Also when you listed on the stock exchange you have to have one version of the truth really”.

6.3.2.8 Implementing a staff-focused approach allows all employees to engage with each other and with management on all levels. It is recommended that the staff retention strategies include solid business practices and steps to make employees feel secure. This will contribute to overall e-tailer success. The participants mentioned that the working environment is unpredictable and fast-paced, so integrating innovative strategies and utilising technology to increase performance could help to protect staff. A study conducted by Attaran et al. (2019:28) concluded that implementing digital technologies in the workplace has shown to increase productivity and efficiency in e-tailers. Workplace innovation and a conditional approach to working, that is, that systems and processes are altered according to people's capacities, have been shown to be a successful strategy (Pot, 2017:107). It is therefore recommended that e-tailers consider the implementation of innovative strategies while integrating a conditional approach that focuses on employees' health, well-being and coping strategies in the workplace. This will assist with reducing staff turnover.

6.4 Develop an effective growth and development framework for South African apparel e-tailers

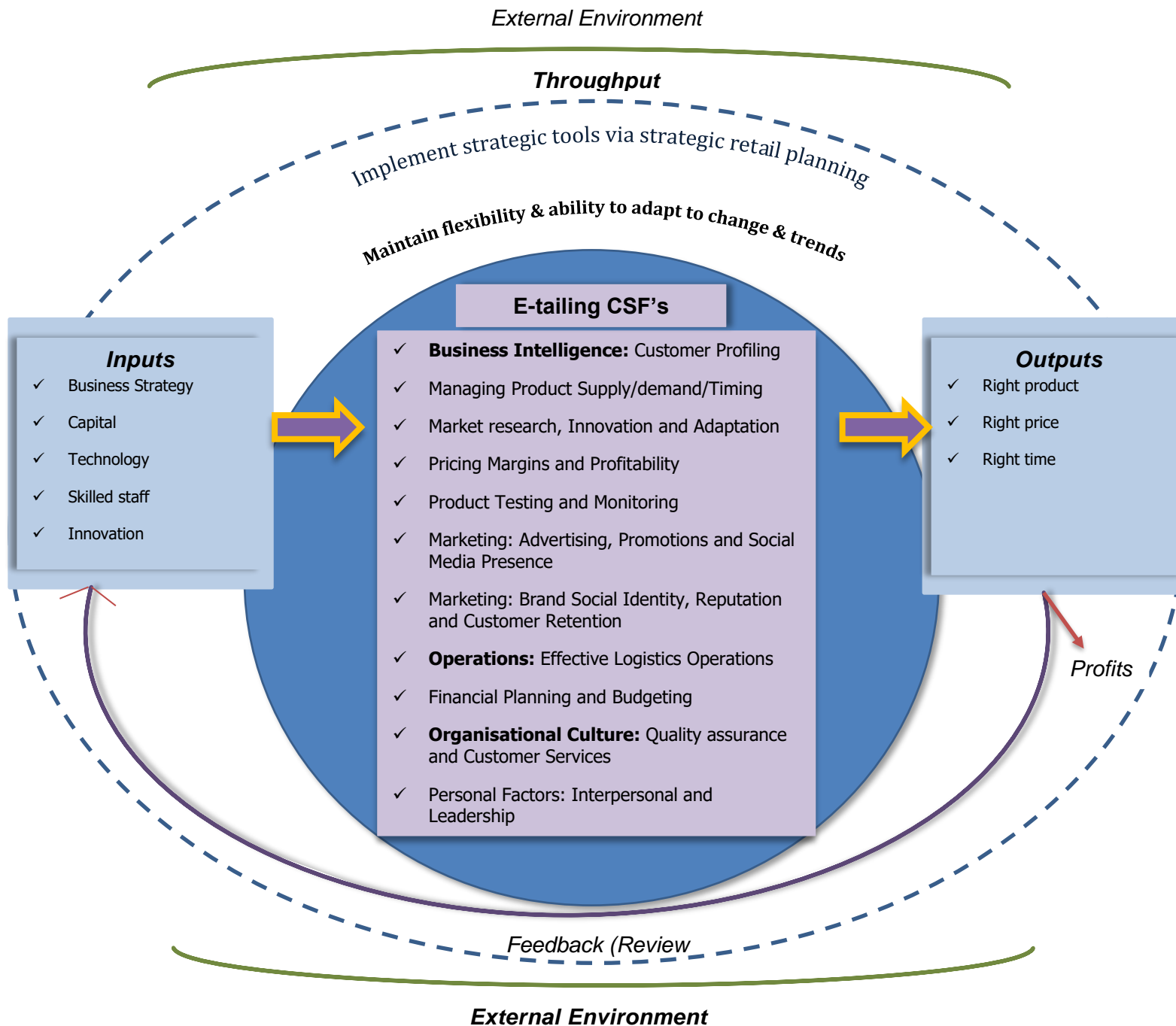


Figure 6.1 Proposed growth and development framework for apparel e-tailers

Source: author's own compilation, 2021

Figure 6.1, above, depicts the development framework derived from the data in this study. As previously mentioned, the study adopted an open systems framework which assumes that a business operates as a social system in interaction with its external environment. As discussed in Chapter Three, the model includes the three cycles of input, throughputs and outputs (Thien & Razak, 2012:892). The findings suggest that inputs are constantly changing due to continual changes taking place in the external environment. These inputs are processed internally, focusing specifically on driving the identified CSFs.

While the organisation processes its inputs, applying and adhering to the strategic retail planning process remains key. The need to be flexible throughout allows the organisation to sell the correct product at the most competitive price and to enter the market at the correct time, resulting in profitability. The system relies on clear effective communication throughout, and especially in the throughput phase.

The proposed framework indicates that the CSFs identified in this study are transformed into outputs. Feedback regarding the performance of the products is therefore required in order to identify whether the CSFs need to be adjusted and tailored to the business and/or whether more effective strategies need to be implemented to attain long-term survival. It is therefore recommended that existing South African apparel e-tailers as well as potential e-tailers entering the market consider this growth and development framework as a guide for strategising in apparel e-tailing.

6.5 Research study contribution

This research study proposes an apparel e-tailing development framework for South African e-tailers in the clothing industry as a result of researching the most successful apparel e-tailers in South Africa. Interviews were conducted with managers at the various head offices, with the aim of identifying the applicable CSFs or critical success factors. The importance of strategic retail planning, the challenges encountered in the business environment and potential strategies were all identified. A comprehensive literature review of the field of research was carried out to broaden the researcher's knowledge and provide a solid foundation the study.

This study established a set of CSFs for the apparel e-tailing industry which has the potential to grow and support the industry. Apparel pure-players have the capacity to increase efficiency if an industry-wide IT software system is developed and implemented.

The study also found that government support is needed in terms of reviewing the industry's import and export laws and regulations, promoting data accessibility and improving technological infrastructure across all communities nationwide.

In order to increase internal efficiency and reduce staff turnover, in-depth digital planning should be adopted and integrated through implementing digital technologies in all divisions of the business. Seeking a more accommodating approach to handling staff – such as the conditional approach – is another strategy recommended by the study.

Finally, to contribute to knowledge in the immediate field, this study created a coherent e-tailing development framework which primarily showcased clear communication and the ability to adapt throughout the organisation. The study showed that, while long-term planning is essential, efficient communication and short-term planning enables the kind of flexibility required in the industry.

6.6 Limitations

In the midst of conducting interviews, the national lockdown came into effect. As a result the remaining interviews that could not be conducted face-to-face were sent to the participants via email, which could have affected the quality of the data collected. To mitigate this limitation, the researcher asked participants to answer the questions in a comprehensive manner even though the interaction was now based on a questionnaire rather than an interview.

During the data collection process, one participant did not feel comfortable in disclosing certain information. When the data from this organisation is compared with the data collected from the three other e-tailers, it was determined that the two other participants from this organisation provided a sufficient amount of information, even in the absence of this one participant's contribution to the overall reach of the data in the study.

As a consequence of the research methods chosen the study may be open to subjectivity on the part of the researcher. The researcher was mindful of this and sought to remain impartial throughout the study, especially while interpreting the data and drawing conclusions.

6.7 Further research

This study focused on establishing the CSFs of large successful apparel e-tailers already trading in South Africa. Future research could focus on identifying CSFs or growth factors for start-up apparel e-tailers trading in South Africa, relative to the size of their businesses. Such a project would be of benefit to other potential start-up e-tailers about to enter the market.

As a result of the Coronavirus epidemic, the e-tailers in this study came to understand the significance of utilising local production. Studies that can help identify strategies to encourage apparel retailers to continue to use and grow their South African supply base could potentially help local suppliers to gain more business from local retailers. For example, the study could focus on practical plans and requirements suggested from the retailers' perspective that could be put into place for them to do business with local suppliers, as well as focusing on the suppliers' viewpoint in order to create an efficient and beneficial partnership. Alternatively, studies could focus on the high staff turnover e-tailers are experiencing: the research might monitor turnover rates in various e-tailers and investigate reasons for employee dissatisfaction. This sort of study could identify effective strategies to assist organisations in controlling the problem.

In conclusion, although the South African apparel e-tailing industry still consists of a small number of dominant players, the CSFs as well as the e-tailing framework developed in this study are intended to assist and promote growth within the industry. The researcher recognises that with the support of government, the potential to advance and grow the industry can be further enhanced. External factors in the business environment have a direct impact on e-tailers' performance, so it is suggested that apparel e-tailers, government, local suppliers and CMTs confer and negotiate on products, manufacturing, and ways in which the government can get involved in remodelling the industry so as to reboot the local manufacturing industry.

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Appendix A: Consent Form



Faculty of Business & Management Sciences

Graduate Centre for Management

4th Floor, Engineering Building

Cape Town Campus, Cape Town

021 460 3833

CONSENT FORM FOR PARTICIPATION IN RESEARCH

I (**Participant/ Interviewee**), am over the age of 18 years and hereby consent to participate as requested in the research study titled:

“Critical success factors for e-tailing: A case study of a clothing retailer in Cape Town”

I recognize that:

1. I have read the information provided to me as a participant.
2. Procedures and the risk involved have been adequately explained to my understanding.
3. I shall retain a copy of the Consent Form for future reference.
4. I may not directly nor indirectly benefit from partaking in this research.
5. I am able to withdraw from the project at any time and bypass particular questions.
6. While the information gained in this study will be published, I will not be identified and individual information will remain confidential.
7. Whether I participate, withdraw or abstain after participating, the study will have no effect on my work within the organisation that I work for.
8. Whether I participate, withdraw or abstain after participating, I will not have any preconceived notions toward Cape Peninsula University of Technology and my own employer.

Participant's Signature: _____

Date: _____

Researcher's Declaration: I confirm that I have explained the study to the participant and that she/he understands what is involved and freely consents to cooperating.

Researcher's name: Kayla Arendse

Contact: 062 072 9371

Researcher's Signature: 

Date: 20.10.2021

Appendix B: Interview Questions

1. Critical success factors are those limited number of areas identified by the business that results in success and causes competitive performance. In short, critical success factors are crucial factors or activities needed to ensure success for a business. What are the critical success factors/core areas/activities that you can identify for your organisation?
2. In what ways do these specific factors help the business?
3. Are these factors relevant for most online retailers? Or company specific?
4. Would you suggest that these factors determine long-term or short-term growth?
5. How often are new areas or activities identified by your organisation? And why?
6. What would you identify as the internal and external challenges that your organisation and apparel e-tailers are facing?
7. What types of strategies can be implemented to overcome the challenges that your organisation is facing?
8. Do the strategies you mentioned require government intervention? And why?

Determine the importance of strategic planning tools.

1. Is a company's strategic planning process significant for long-term survival? Such as a business strategy, a business model?
2. In short, what type of business model does your organisation follow?
3. Would you suggest your organisation identify a long-term strategy in order to compete? Or should the strategy be short-term and be revisited often due to constant market changes and innovations?
4. Are the strategies identified by the company imbedded and implemented in each department? And how?
5. What should future apparel e-tailers operating in the South African market prepare themselves for?

Appendix C: Ethical Clearance Certificate



P.O. Box 1906 • Bellville 7535 South Africa • Tel: +27 21 4603291 • Email: fbmsethics@cput.ac.za
Symphony Road Bellville 7535

Office of the Chairperson Research Ethics Committee	Faculty: BUSINESS AND MANAGEMENT SCIENCES
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The Faculty's Research Ethics Committee (FREC) on **19 November 2019**, ethics **Approval** was granted to **Kayla Arendse (213045788)** for a research activity for **MTech: Retail Business Management** at Cape Peninsula University of Technology.

Title of dissertation/thesis/project:	CRITICAL SUCCESS FACTORS FOR E-TAILING: CASE STUDIES OF CLOTHING RETAILERS IN CAPE TOWN Lead Supervisor (s): Dr V. Mugobo
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Comments:

Decision: **Approved**

 Signed: Chairperson: Research Ethics Committee	12 December 2019 Date
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Clearance Certificate No | 2019FOBREC734

Appendix D: Certificate from Language Editor

Epsilon Editing

17 Kew Gardens
28 Park Drive
Gqeberha
6001

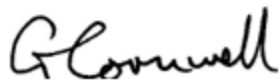
dgncornwell@gmail.com

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1 July 2021

TO WHOM IT MAY CONCERN

This serves to confirm that the Master's thesis by Kayla Kim Arendse, "Critical success factors for e-tailing: case studies for clothing retailers in Cape Town", has been proofread and edited to my satisfaction for English idiom and correctness of expression. The referencing has been checked against the CPUT Harvard-style standard.



Professor D G N Cornwell (PhD)