Scandinavian Fashion
Scandinavian Fashion

A guide for Scandinavian fashion SMEs, to improve their marketing strategy on the Dutch fashion market.

Marleen Keesen
Amsterdam Fashion Institute
Fashion & Management
Final Thesis
Reader 1: Frank van Emden
Reader 2: Clarence van der Putte
Arnhem, November 2010
THE NORWEGIANS PLAN THE DESIGNS.

THE SWEDISH MAKE THEM.

CLONK

CLONK

Kind of like this!

Please make it cute.

It's nice!

LISA A LITTLE MAIDEN IN THE HISTORY.

THE DANES SELL THEM.

Axis Powers Hetalia ©
Preface

This thesis is written because of my fascination for fashion from the Nordic European countries. My interest in Scandinavian fashion has developed with my cultural trip to Denmark in the main phase of my study at AMFI. With this trip I learned about the fascinating culture of the Danes and their cultural heritage in design in which fashion takes an important place.

Within my exchange to the University of Huddersfield I had to do an assignment on the fashion history of Scandinavia. With my return to the Netherlands and the knowledge of Scandinavian fashion I realised that I wanted to gain more knowledge, a broader and deeper understanding of Scandinavian fashion and its place on the Dutch market.

In this thesis I will look at this discussion with a ‘marketing point of view’ as I learned that the most heard and common problem of Scandinavian fashion brands is the low brand awareness in the Netherlands.

This thesis couldn’t have been written without the information of Lisa Leistra of the Swedish Embassy, Micheal Nord of the Danish Embassy and Helena Mollström of the Norwegian Embassy I wouldn’t have a good knowledge of the Scandinavian countries, their cultural affaires and the governmental support.

In special I would like to thank the persons who were able to find the time to help me with an interview. These persons are Daphne Blom and Caroline Weeseman of Soaked in Luxury and Hanneke de Boer of Agency ‘Are you Swedish?’

I would like to thank Mikkel Rommelhoff and Kate Hutchinson-Keesen. For translating all Danish, Norwegian and Swedish texts I would like to thank Mikkel Rommelhoff and Kate Hutchinson-Keesen for correcting my English.

I would like the tutors from AMFI, who have guided me, Angela Kilcoyne, Mirjam Goedkoop and Joop Smit.

At last but not least I would like to thank Frank van Emden, who have helped me write this dissertation in the best possibility and made it to succeed.
Preface

Chapter 1: Introduction

1.1 Introduction 8
1.2 Purpose of the thesis 8
1.3 Research question 8
1.4 Aim of thesis 9
1.5 Limitations 9
1.6 Research methods 9
1.7 Chapter classification 10

Chapter 2: Scandinavian fashion

2.1 Scandinavia 11
2.2 Fashion History 12
2.3 Definition Scandinavian fashion SMEs 14
2.4 Market share in the Netherlands 19
2.5 Motives for Scandinavian fashion brands to enter the Dutch market 21
2.6 Conclusion 23

Chapter 3: The current economic situation in the Netherlands

3.1 Market analyses 23
   3.1.1 Dutch fashion market 23
   3.1.2 The recession and its influence on the Dutch fashion market/industry 25
   3.1.3 Market trends 26
3.2 External analyses of the Netherlands 27
   3.2.1 DESTEP 27
   3.2.2 MESO 29
3.3 Conclusion 32

Chapter 4: Consumer behaviour

4.1 The Dutch and the Scandinavians 33
4.2 Hofstede’s Cultural dimensions 35
4.3 The Dutch fashion consumer 37
4.4 Maslow’s hierarchy of needs 38
4.5 Adaption of fashion 40
4.6 Conclusion 42
Chapter 5: Marketing
5.1 International management 43
  5.1.1 Entry modes and strategies 43
  5.1.2 Adapting the marketing mix 46
5.2 Porter’s generic strategies 49
  5.2.1 Cost leadership strategy 50
  5.2.2 Differentiation strategy 50
  5.2.3 Focus/segmentation strategy 50
5.3 Integrated marketing communications 51
5.4 Conclusion 54

Chapter 6: Branding
6.1 Positioning 55
6.2 Branding 55
  6.2.1 CBBE Model 56
6.3 Country of origin branding 58
6.4 Conclusion 58

Chapter 7: Conclusion
7.1 Conclusion 59
7.2 Recommendation 60

Appendix
  Appendix 1 62
  Appendix 2 64
  Appendix 3 66
  Appendix 4 68

Bibliography and resources 76
Chapter 1: Introduction to the thesis

1.1 Introduction

Scandinavia is “booming”, their culture, design and especially fashion. Nevertheless, not many people are aware that they are consumers of Scandinavian brands. People flock to Ikea and H&M, but rarely do people realize that Vero Moda, Jack & Jones, and In-Wear are in fact owned by Scandinavian companies. Brand awareness of Scandinavian fashion brands is very low in the Netherlands, is there a future for these brands? Do the Scandinavian fashion brands have potential to grow and to increase the brand awareness?

The similarities between Dutch and Scandinavian culture inspired this thesis. Although we’re so similar to Scandinavia, I feel that the Dutch people don’t know a lot about these countries and there is not such an interest for as for example the south of Europe. This narrow-minded look at Scandinavia includes the fashion industry, while Scandinavian fashion is, in my opinion, one very close to the taste of Dutch people.

1.2 Purpose of the thesis

This final thesis is part of the course Fashion & Management at the Amsterdam Fashion Institute. The purpose of this thesis is to provide an insight into small-medium fashion enterprises from Scandinavia. Some of these brands have low brand awareness in the Netherlands and might have a high potential for growth. The report will give an overview of the Dutch fashion market, the fashion consumer and marketing-communication strategies recommended.

1.3 Research question

“What is the best marketing strategy for Scandinavian small-medium fashion enterprises in the mid/high segment in the Netherlands?”

A number of research questions will be answered:

- What are Scandinavian small-medium fashion enterprises?
- What is the current economic situation on the fashion market?
- Which marketing strategies can be useful for Scandinavian small-medium fashion enterprises?
- What is the competition on the Dutch fashion market?
- What is the consumer behaviour of Dutch fashion consumers?
1.4 Aim of the thesis

The aim of this thesis is to find a general marketing solution for Scandinavian small-medium fashion enterprises, with this report as a guideline to the Dutch market.

1.5 Limitations

This thesis will focus on brands from the largest countries in Scandinavia: Denmark, Sweden, and Norway. This report focuses on small-medium fashion enterprises from Denmark, Sweden and Norway, operating in the mid to high segment on the Dutch fashion market.

Scandinavia: Three monarchies, consisting of: Denmark, Sweden and Norway

Small-medium fashion enterprises: small businesses smaller than 50 employees and medium businesses fewer than 250 employees.

Mid-to High segment: Businesses that are operating on the fashion market with garments priced between 100 to 100 Euros.

1.6 Research methods

This thesis is has a research driven approach, I will be collecting data from qualitative as well as quantitative research methods.

In order to answer the research question I will research into different strategies that are used to improve the brand awareness as well as cultural and economic influences on consumers in the Netherlands. For this I not only established research sources as books, journals and surveys, but due to the contemporary relevance of the thesis I also used a lot of internet sources, as literature only wasn’t enough to research this thesis.

I interviewed decision makers in the fashion industry both in the Netherlands and abroad as well as officials at Scandinavian embassies. For a good knowledge of the consumers I held a questionnaire among Dutch and Danish consumers, to see the differences between the “shopping cultures” in these countries. This questionnaire was spread trough internet among social networks and contacts I have who have send the questionnaire out.
1.7 Chapter classification

In the second chapter I first will define what Scandinavian fashion is, in a cultural perspective, what the position on the Dutch market is at the moment and what the motives would be for Scandinavian fashion SMEs to enter or develop on the Dutch fashion market.

Following this, in chapter three, the Dutch fashion market is laid out. The competitive analyses of the Dutch fashion market, what does the macro and micro economics looks like and what does the external analyse tell?

In the fourth chapter the Dutch consumer is analysed, what are the differences with Scandinavian people, what do Dutch consumers spend on clothing and what the consumer behaviour in the fashion industry is?

In chapter five, I will analyse all marketing strategies that can be used by international firms. What are the entry strategies and what are the growth strategies. This will include the adaption of the marketing mix, positioning, branding, segmentation and integrated marketing communications.

This is followed by chapter six, where the outcome of the questionnaire is analysed.

As a last chapter 8, the conclusion will follow from the chapters before. In this chapter the answer on the research question can be found as well as my recommendations for small-medium fashion enterprises from Scandinavia.
Chapter 2: Scandinavian Fashion

This chapter introduces small-medium fashion enterprises, operating in the mid to high segment. It gives in insight of what Scandinavia is, the history of the fashion industry in Scandinavia, the market share on the Dutch market and motives to enter the Dutch market.

2.1 Scandinavia

Scandinavia is a term which is used to define the northern countries of Europe. The word can be used in three different meanings:

- Geographical: Scandinavia is the area equivalent to the Scandinavian Peninsula which mostly consists of the Scandinavian mountains. These are the countries Sweden and Norway.
- Political: Scandinavia consist the countries, Sweden, Denmark and Norway, this is the standard used in Scandinavia itself.
- Historical and cultural: Scandinavia consist next to the countries, Sweden, Denmark and Norway also the other countries of the Nordic Council which are Finland, Iceland and the constituent countries.

![Figure 2.1 Definition Scandinavia](image)

This thesis will research fashion from the Scandinavian countries, Denmark, Sweden and Norway, thus the political point of view of Scandinavia.

---

1 Derry, T.K., 1979, A history of Scandinavia, George Allen & Unwin LTD, London, UK
2.2 Fashion History

Since the mid 20th century Scandinavia has developed as a fashion area. The Scandinavian fashion industry was at the beginning primarily focused nationally, and relatively recently extended internally.

Since the 1960’s Danish and Swedish fashion developed into one of the largest export products of Denmark and Sweden. Compared to other European countries, the Scandinavian fashion industry is relatively young. Nevertheless they have grown rapidly in the few decades. Fashion brands from Scandinavia have gained worldwide recognition for their clean and simple designs, though every country has its own signature.

With each country hosting their own fashion week and several fashion fairs, the industry is pushing Scandinavian fashion to forefront of the international market. The international Fashion weeks in Copenhagen, Stockholm and Oslo seek recognition for their fashion peers as well as worldwide attention from fashion press and buyers.

Denmark fashion week exists since 1964. The fashion week is held 2 times a year in February and August. Copenhagen fashion week is the largest of all fashion weeks in Scandinavia with around 50,000 visitors from all over the world.

Stockholm fashion week hosts four events a year. In February and August are the major fashion weeks (called fashion week by Berns), May and November focus on retailers’ collections. The fashion week of Stockholm exists since 1995.

Oslo fashion week is the youngest of the Nordic fashion weeks and exists since 2004. It is held in February and August.
NICE is a new and ambitious Nordic initiative with the overall objective to lead the Nordic/Scandinavian fashion industry towards a stronger focus on responsible, ethical, and sustainable production. NICE includes a number of projects and partners across the Nordic countries.

The Nordic Fashion Association was founded in 2008, after Danish Fashion Institute, Oslo Fashion Week, The Swedish Fashion Council, Helsinki Design Week and Iceland's Fashion Council decided to cooperate.

The five Nordic organizations want the fashion industry to act more responsible. In addition to help struggling designers and textile companies to source in accordance with the Nordic innate values which reflect a need to protect the environment and a wish to behave fairly.

Nicefashion.org is a web tool for consumers, retailers and designers involved in the textile business. It also includes a forum where professionals can find resources and exchange information. The site aims to inspire more environmentally safe and ethical design and sourcing; while involving the customer in the process.²

² http://www.nordicfashionassociation.com
2.3 Definition Scandinavian fashion SMEs

Scandinavia Fashion is originated in the countries; Denmark, Norway and Sweden. Brands and designers from Scandinavia can be divided in several categories, Haute Couture, Designer, Secondary lines, Brands and Private labels.

*Haute Couture* is the most exclusive in the fashion industry; these garments are hand-made for the end-consumer. Haute Couture pieces are measured to fit the consumer precisely. In Scandinavia there are only a few Haute Couturiers, nevertheless they are not recognized by the Chambre Syndicale de la Couture.

Scandinavia does have many fashion *designers*. The fabric’s, cut; detail and trim are usually superior to other ready-to-wear items. These designers often have *secondary lines*, which are less expensive but still of high quality and a signature look of the designer.

*Brands* have a fashion-forward look, but with an affordable price range. Scandinavia has many brands in different price ranges sold all over the world.

*Private labels* are designed specifically for a store, offering the latest looks for less than a brand. Private labels from Scandinavia are sold worldwide and very popular at the moment.

In this dissertation I will take a look at Designer, Secondary lines and Brands. These are mostly small to medium fashion enterprises, that have a potential to grow and of which most have a small market share on the Dutch Market.

An SME is defined by the European Union as a company with those with fewer than 50 employees as "small", and those with fewer than 250 as "medium." In the EU, SMEs comprise approximately 99% of all firms and employ between them about 65 million people.

The mid-high segments, defines itself in luxury goods with prices starting from €70 to €120 Euros for tops, €150 to €300 Euros for bottoms and over €100 to €700 Euros for outerwear.

---

In this mid-to high segment we can define the Scandinavian brands in three categories: designers, secondary lines and brands. Designers are the highest in the ranking, with luxury goods and high prices. Among the designers from Scandinavia that will be researched are:

- Tiger of Sweden
- Camilla Norback
- Dagmar
- Mads Norgaard
- Bruuns Bazaar
- By Malene Birgr
- Bitte Kai Rand
- Designers Remix Collection

The secondary lines are in the middle of designers and brands according to the prices, it is still luxury, with a signature of the designer, but on a more affordable price. The secondary lines that are researched are:

- Tiger Jeans (by Tiger of Sweden)
- BZR (by Bruuns Bazaar)
- Day Birger et Mikkelsen (Formally owned by Malene Birger)

The brands from Scandinavia in the mid to high segment are aiming at luxury, on an affordable price, design is less irrelevant then the style. The brands I research are:

- Samsøe og Samsøe
- ACNE
- SAND
- Inwear/ Matinique
- Moods of Norway
- Just Female
- Second Female
- FIN
Danish Fashion
Swedish Fashion
Norwegian Fashion
2.4 Market share in the Netherlands

The largest operators of Scandinavian fashion are the companies Bestseller (ONLY, Vero Moda, Jack & Jones), IC Company (In-wear, Matinique) and Hennis & Mauritz. In which H&M has a market share of 7.1 percent in the Dutch market, second ranked after C&A.\(^5\)

In addition to these companies, there are smaller Scandinavian fashion brands sold in the Netherlands. These smaller brands are represented by Dutch agencies. For these brands it is not (yet) necessary to have an own distribution and sales company in the Netherlands. The brands are represented by an agency and sometimes have a PR agency to do their marketing and PR. In the Netherlands there are several agencies specialised in Scandinavian brands. Distribution of the sold apparel is mostly done by the headquarters of the company based in the country of origin.

The Table shows the amount of imported goods to the Netherlands in Euros.

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Total EU</th>
<th>Total non EU</th>
<th>Denmark</th>
<th>Sweden</th>
<th>Norway</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td>5.847.811</td>
<td>2.607.032</td>
<td>3.240.779</td>
<td>188.008</td>
<td>28.38</td>
<td>636</td>
</tr>
<tr>
<td>2006</td>
<td>6.473.886</td>
<td>2.747.775</td>
<td>3.726.111</td>
<td>222.041</td>
<td>36.798</td>
<td>941</td>
</tr>
<tr>
<td>2007</td>
<td>6.622.900</td>
<td>3.026.830</td>
<td>3.596.070</td>
<td>231.868</td>
<td>64.141</td>
<td>1.973</td>
</tr>
<tr>
<td>2009*</td>
<td>6.900.009</td>
<td>3.175.953</td>
<td>3.724.056</td>
<td>239.392</td>
<td>38.948</td>
<td>1.135</td>
</tr>
</tbody>
</table>

*Figures of 2009 is temporary
Figures are taken from CBS
source: www.centraalplanbureau.nl

Looking at the latest import figures it shows that the Scandinavian fashion export to the Netherlands is still on a low level. The figures show that the import from outside the European Union is higher than countries from the European Union.

\(^5\) Mintel
Looking at this figure adapted from the website of *Centraal bureau voor Statistiek*, it shows clearly that the amount of fashion imported from the Scandinavian countries by EU countries is a small percentage of the total imported of fashion wear.

*Figure 4.2  
*Figures of 2009 is temporary  
Figures are taken from CBS  
source: [www.centraalplanbureau.nl](http://www.centraalplanbureau.nl)*

Compared to the figures of the whole import, the Scandinavian import to the Netherlands is a small percentage of the whole import figure of the European Union.

While H&M has a market share of 7.1 percent in the Netherlands, the figure is still very low because the apparel H&M is producing is directly imported from the production country to the Netherlands.
2.5 Motives for Scandinavian fashion brands to enter the Dutch market

Internationalisation is now a common practice for fashion brands, although this is mainly an issue for large firms. Due to globalisation, technological advantages and easier information flows, small-medium enterprises (SME) are also able to go international. The motives for internationalisation can be divided into two:

- Pro-active motives, the main aim is to grow and increase profits. Another aim can be to exploit favourable economic conditions in a country or to sell the uniqueness of the product.
- Reactive motives, reaction on the external pressure. This is for a SME the case as they are forced by competitors working on the foreign market. The question of foreign buyers can be a consideration to be more present on the foreign market.\(^6\)

The many benefits of internationalisation are the key factors to enter a new market. First of all the foreign market enlarges the number of potential buyers which increases the volumes. Especially when the company operates in a small domestic market, internationalisation can be the only way to grow. Being international improves knowledge and capabilities, making the company more competitive.

Although internationalisation has benefits it still has some downfalls, especially for a SME. Lack of knowledge of the foreign market, insignificant networks, linguistic problems, lack of skilled people and most important a lack of financial resources and the adaptation on the foreign market are the difficulties an SME faces.\(^7\)

Internationalisation of Scandinavian fashion brands is not guaranteed, though Scandinavian brands have some great advantages compared to brands from other countries. The most important is that Scandinavian sizes differ from south European brands. For a varied range of differences in physique, Scandinavian brands have good sizing. Most brands in fashion go up to size 42, other brands especially for higher sizes are excluded. Scandinavian brands go higher in size as women and men in Scandinavia are built differently, which is similar to Dutch people.\(^8\)

Second is that the simplicity in design, of Scandinavian fashion brands attractive to Dutch people. Style is important and trends are integrated in Scandinavian fashion but are never over exaggerated. Next to this similarity in style favour, Scandinavian fashion is of high quality and prices are fair.\(^9\)

---


\(^8\) de Boer, 12-08-2010

\(^9\) Trouw, de Baan, 2008
2.6 Conclusion

This chapter discussed the fashion industry of Scandinavia in which is meant the countries; Denmark, Sweden and Norway. The fashion industry in these three countries is relatively new and upcoming compared to other European ‘fashion countries’. In general can be said that fashion from Denmark is commercial and mainstream, brands from Sweden are edgy and with a designer signature, while Norwegian brands are more streetstyle.

It analysed Scandinavian fashion in the Netherlands, this is still a small percentage of the imported apparel to the Netherlands, nevertheless H&M takes a share of 7.1 percent on the Dutch market. Scandinavian fashion brands have different motives to enter the Dutch market, and do also have the abilities to increase sales in the Netherlands. Entry forms most suitable for SME’s are exporting and franchising, entering the Dutch market however can only work when Scandinavian fashion brands adapt the marketing mix in order to fit the Dutch market.
Chapter 3: The current economic situation in the Netherlands

This chapter will analyse the Dutch fashion market and the economic situation at the moment. It includes the DESTEP and MESO analyse and discusses new market trends.

3.1 Market analyses

3.1.1 Dutch fashion market

To constitute a market, a number of conditions have to be met. There should be a genuine need, the consumer(s) should be willing and able to buy the product, and the aggregate demand should be sufficient to enable a supplier to operate profitably. According to this the need for apparel in the Netherlands is a case of search of individuality and identity and not a necessity. Without apparel being a necessity it means that the purchase of a garment is based on different principles. To make consumers buy your product you need another way of presenting your product, differently than just being a garment. This means that marketing and promotion plays an important role on the Dutch fashion market.

Dutch apparel retailing is very much focused on city centres due to strict planning laws. In major cities in the high street, department stores as ‘de Bijenkorf’ Hema’ and Vroom & Dreesman’ can be found, department stores are popular shopping venues for Dutch Consumers.

Apart from the department stores, retailers as ‘Men At Work’ selling different brands and private labels chains as ZARA & WE and brand stores as Mexx, Diesel and Replay can be found.

![Figure 3.1](source: Mintel)

<table>
<thead>
<tr>
<th>Channel</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialist retailers</td>
<td>71</td>
</tr>
<tr>
<td>Department/variety stores</td>
<td>12</td>
</tr>
<tr>
<td>Sports goods retailers</td>
<td>5</td>
</tr>
<tr>
<td>Home shopping</td>
<td>8</td>
</tr>
<tr>
<td>Food retailers</td>
<td>3</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>100</td>
</tr>
</tbody>
</table>

The above figure shows the percentage of sales channels in the Netherlands, where a distinction is made into specialist retailers, department stores, sport goods retailers, home shopping, food

---

11 Hoofdbedrijfschap detailhandel (HBD)/Mintel
retailers and others. The figure shows clearly that specialist retailers and department stores are most common in the Netherlands.

The table below shows the latest figures of the amount of enterprises in different segments on the Dutch apparel market. The enterprises increased with more than 15% in the last five years while in other retail organisations there was a decline.

<table>
<thead>
<tr>
<th>The Netherlands: clothing specialists’ enterprise numbers, 2003-07</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Enterprises</strong></td>
</tr>
<tr>
<td>Childrenswear</td>
</tr>
<tr>
<td>Menswear</td>
</tr>
<tr>
<td>Womenswear</td>
</tr>
<tr>
<td>Underwear</td>
</tr>
<tr>
<td>Fur &amp; Leather</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>General clothing</td>
</tr>
<tr>
<td><strong>Total of above</strong></td>
</tr>
<tr>
<td><strong>Including:</strong></td>
</tr>
<tr>
<td>Non-store</td>
</tr>
<tr>
<td><strong>All retail</strong></td>
</tr>
<tr>
<td>Clothing specialists of all retail (%)</td>
</tr>
</tbody>
</table>

**Figure 3.2**
*Source: Hoofdbedrijfschap detailhandel (HBD)/Mintel*

The increase of enterprises is due to the declining market share of major specialists on the market. Independent retailers feel that they are more able to react on the demand of consumers and are better in competing in the fashion market.\(^{12}\)

---

\(^{12}\) Hoofdbedrijfschap detailhandel (HBD)/Mintel
3.1.2 The recession and its influence on the Dutch fashion industry/market

The credit crunch started already back in 2007 at the United States’ housing market, with the fall of the Lehman Brothers in 2008 the world economy collapsed, it led to a world wide economic recession. This latest recession is one of the largest recessions during the last century, comparable to the world wide recession in the thirties. The fashion industry is also subject to economic developments following the recession.

In the Netherlands, 2008 and 2009 where though years for the fashion market, but since the end of 2009 and during 2010 the Dutch market is upwards again. In 2011 there is expected to be a recovery in turnover in the Dutch fashion industry. In 2009 the turnover declined with 4.3%, given the extend of the economic recession this was only limited. In 2010 the decline will be 2%, in 2011 the turnover is expected to grow with 2%. Nevertheless the turnover in Euros is low, historically seen. This is shown in the table below:

![Graph showing yearly turnover growth and turnover niveau in Euros]

Figure 3.3
Source: ING Sectorvisie kledingbranche

---

13 ING sectorvisie kledingbranche, august 2010
The graph shows the yearly turnover growth/decline following the orange line. The numbers at the left side, show the growth/decline in percentages. The grey beams show the turnover in Euros, the numbers at the right side is the turnover in billions of Euros.

In January and February there was a sharp decline of 10% in fashion import. At his moment the import is back to the level of 2009, which was about € 6.9 billion. The export in 2009 amounted € 4.9 billion, in 2010 the export is supposed to grow with 4% \(^{14}\)

Sales on the internet showed a significant growth of 32% in the year 2009 \(^{15}\)

3.1.3 Market trends

The growth of web stores is a significant change in the fashion market of the Netherlands: not only brands and retailers like H&M, Scotch & Soda and Mexx have a webshop on the internet. On the internet individual webshops can also be found, examples are: welikefashion.com and freshcotton.nl, selling a broad variation of brands online. With this trend consumers in the Netherlands are not anymore obligated to find apparel in high streets but also online and being online means being able to shop worldwide. Consumers in the Netherlands are now able to shop at retailers as NEXT and Dorothy Perkins or find brands at Asos.com or netaporter.com.

The strong competition and the negative economic climate have created downward pressure on the prices of apparel in the Netherlands. Prices of apparel in the Netherlands are lower than in neighbouring countries. In the last ten years the price of clothing declined with an average of 5 percent. Currently the prices of apparel in the Netherlands are 15% below the average of other European countries \(^{16}\)

When the credit crunch hit the Netherlands, the Dutch fashion consumer doesn’t feel the need to spend their money on mass production fashion, but intend to spend their money on high quality and on apparel with an individualistic character \(^{17}\)

\(^{14}\) ING sectorvisie kledingbranche, august 2010
\(^{15}\) ABN Amro Visie op Retail kledingbranche, 2010
\(^{16}\) www.fashionunited.com
\(^{17}\) www.fashionunited.com
3.2 External analysis of the Netherlands

3.2.1 DESTEP

The DESTEP method analyses the demographics, economics, social, technological, ecological and political situation in a country. Companies can use these analyses to get a grip on the opportunities and threats and will be able to adapt the strategy to the country.

Demographic aspects
The Netherlands is a relatively small country with a high population. It has the ninth-largest population in Europe, with about 16.5 million people. It is slightly growing every year, but, because of the high emigration rate, the population growth will decrease and the aging of population will increase. The main population lives in the west of the Netherlands, also called ‘de Randstad’, which is also the business and financial heart of the country. These statistics show especially, due to the high population that there is many market share to win for Scandinavian brands in the Netherlands, the best place to settle first, could be in ‘de Randstad’.

Economic aspects
Between 2004 and 2008 there was a significant growth of the economics in the Netherlands, but following the credit crunch in The United States, the Netherlands also is in a state of financial crisis. Although the Netherlands is in a financial crisis, the worst part is believed to be over and since the end of 2009 the economic is stable and growing again. Consumer trust is growing since the middle of 2010. Due to the Netherlands has a stable economic situation and consumer trust is winning again, Scandinavian fashion SMEs have a safe situation to expand their brands.

Social aspects
The Dutch society is one of many cultures; the growth of immigrants is still increasing. Since the sixties the immigrants where originated from Morocco, Turkey and Italy, nowadays they come from the east of Europe. Next to immigrants, the Netherlands also houses refugees from the countries in war in Africa. 88.8% has the Dutch nationality; these include the people who come from the former colonies, Indonesia, the Dutch Antilles and Surinam. This number is expected to be decreasing as more Dutch people emigrate and more immigration is expected.

---

18 Centraal Bureau voor Statistiek
19 Centraal Bureau voor Statistiek
Technical aspects
The technical developments are hard to predict, but can be expected in the field of internet and data communication. The Netherlands is also home to many corporations who have a technically background, these include Phillips.

Ecological aspects
The Dutch are very aware of incoming climate changes, this is due to the fact that the Netherlands is situated under sea level and the climate changes can have great impact on Dutch people and their lives. Because of these climate changes, Dutch strive for more durability. Most Scandinavian brands join the Nordic Fashion Association, which is with the NICE campaign trying to make the Nordic fashion industry more durable and respectable.

Political aspects
At the moment the Netherlands does not have a government, still the political environment is very stabel. As a part of the European Union, the Netherlands has boundaries. There is free movement of people and products between the European countries. With a stable government and a healthy political environment there are for Scandinavian fashion SMEs no boundaries to establish on the Dutch market.

20 www.marketresponse.nl
3.2.3 MESO

The MESO analysis provides information on the competitors, suppliers, buyers and public groups operating on the same market.

**Competition**
Consumers today are presented with a wide range of choice in apparel, in all price ranges can brands and retail stores be found trying to cover the needs of consumers. Yet it is likely the consumer is still complaining that he or she can’t find what he or she is looking for. This problem can most be found in sizing problems and in a lesser amount of style and price problems. Clothing producers and retailers are working hard to correct this problem, but they do not find the investments and are not willing to experiment to solve this problem. More often you see that clothing producers and retailers use *price* as a weapon in competition with other brands.

What can be defined as a competitor if you’re not analysing one singular brand, but a range of brands in the same price segment and more and less the same signature of design? In this case the competition will be analysed in groups, these will be private labels, brands from the southern of Europe, brands from the United Kingdom, brands from the United States, and brands from the Netherlands itself.

**Competitors**

*Private Labels:*
Private labels are designed specifically for a store, offering the latest looks for less than a brand. Private labels are operating on the low to mid price segment. Private labels are popular among the Dutch consumer, stores as ‘men at work’ and ‘Open32’ are offering private labels with the latest looks but on a lower price.

Prices:
- Low- to mid segment

Strong:
- Offering the latest looks.
- Prices are fair compared to brand prices.

Weak:
- Quality of the clothing is lower compared to brand clothing.
- They are often copies from brand clothing

---

21 www.fashionunited.com
**Brands from Southern Europe:**
Brands from southern Europe have been dominating the fashion industry since the early 90s. The fashion industry is originated in Paris and Milan as mean fashion capitals. With this history brands from southern Europe have a solid ground to start from. Examples from brands originated in the south of Europe are: Moschino, Atelier deLaDurance, Guess and Kookai

Prices:
- Mid to high segment

Strong:
- Due to the long fashion history, they have a solid background in the fashion industry.
- The marketing departments are almost as good as the designs itself.
- Availability in the Netherlands of these brands is very high.
- Classic or extraordinary designs.

Weak:
- Sizing problems are very common on the Dutch market.
- Never really original or rewarded.
- The extraordinary designs are sometimes ‘too much’ for the Dutch consumer.

**Brands from the United Kingdom:**
British brands are available in the Netherlands for quite some time now, examples of British brands are: Burberry, Pepe Jeans and Gio-Goi.

Price segment:
- Mid to high segment

Strong:
- Sizing fits the Dutch consumer better than the southern Europe clothing.
- Most of the British brands strive to more durability.
- Contemporary designs.

Weak:
- Some British brands have a bad brand name due to hooligans wearing British brands a lot.

**Brands from the United States:**
Brands from the United states available in the Netherlands are including; Tommy Hilfiger, Calvin Klein and Polo by Ralph Lauren

Price segment
- Mid segment

Strong:
- Basics designs that fit the Dutch Consumer.
- Prices are affordable.
- High quality.

Weak:
- The designs are very basic and there are not many differences in designs during the years.
Brands from the Netherlands:
Brands from the Netherlands became very popular in the last decennia’s, these brands include Scotch & Soda, Blue Blood, G-star and Gsus.
Price segment:
  - Mid segment
Strong:
  - Contemporary designs.
  - High quality, fair pricing.
  - Good sizing for the Dutch consumers.
  - Favourable among Dutch consumers due to the origin of own country.
Weak:
  - Over exposure.

Retailers/Buyers

SPMRKT:
SPMRKT is a high end store at ‘de Rozengracht’ in Amsterdam; the store is based in an old supermarket. This store contains mostly clothing but also some interior pieces and books.
Prices:
  - High segment
Strong:
  - Broad collection of many brands.
  - They already sell some of the Scandinavian brands.
Weak:
  - Just one store.
  - Very high prices.

De Bijenkorf:
De Bijenkorf is a department store chain; there are stores of the chain in the main cities of the Netherlands. The store sells brands in a broad range of price and design.
Prices:
  - Mid to high segment
Strong:
  - Broad collection of brands
  - Stores across the Netherlands.
Weak:
  - of exclusive and high pricing
Public groups:

Media:
In the Netherlands fashion is a subject of matter. In daily lives of men and women in the Netherlands fashion is a way of showing identity and individualism. Communication channels of ‘fashion minded people’ are the traditional fashion magazines as ELLE, Glamour and Cosmopolitan (all Dutch publications), the weekly’s like Grazia and Beau Monde and the more art and fashion related magazines like Code and Blend.

For professionals working within the fashion industry there are magazines as Link and Textillia covering news and background information about the industry. Nearly every daily newspaper has a fashion page which updates weekly or monthly.

Internet can be seen as a new but fast growing channel for fashion news; this includes web magazines, blogs and fashion information sites.

On the Dutch television fashion has in the last ten years got more attention. Styling programs and make-over programs have had a huge impact on the Dutch fashion market. Programs related to fashion as America’s next top model and Project Runway are also popular among Dutch people.22

Industry organisations

The Netherlands account some industry organisations, which are fully committed to fashion and/or fashion/interior/beauty. In the Netherlands are also three universities teaching fashion focused from an economic view, next to the art academies where you can find fashion design studies.

3.3 Conclusion

In this chapter discussed the Dutch fashion market is analysed, after defining what a market exactly is, It was understood that fashion in the Netherlands is mainly distributed by specialist retailers and department stores. The Dutch fashion consumer thinks fashion plays an important role in their life, but don’t intend to spend a lot of money on it, though prices of apparel in the Netherlands are lower than in neighbouring countries.

The DESTEP analyses showed that the Netherlands is a solid country, to establish. The competition at the Dutch fashion market is high; this became even higher by the great amount of web shops which are gaining more popularity with the Dutch consumer.

22 www.fashionunited.nl
Chapter 4: Consumer behaviour

Knowledge of consumer behaviour directly affects the marketing strategy. This is because of the marketing concept, i.e., the idea that firms exist to satisfy customer needs. Firms can satisfy those needs only to the extent that they understand their customers. For this reason, marketing strategies must incorporate knowledge of consumer behaviour into every facet of a strategic marketing plan.\(^\text{23}\)

4.1 The Dutch and the Scandinavians.

Despite high levels of taxation the wealth of Scandinavia has grown after Second World War. Scandinavia has a high standard of living, education is paid by the government and health care is supported by the government. Scandinavians have a high standard of living and the countries are ranked in the top 10 of happiest countries.\(^\text{24}\) This is similar to the Netherlands.

In all four countries (Denmark, Sweden, Norway and the Netherlands), the gross domestic product (GDP) per capita in purchasing power standards (PPS) is above the European average.

GDP per capita in PPS

<table>
<thead>
<tr>
<th></th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Europe</td>
<td>103.9</td>
<td>103.7</td>
<td>103.4</td>
</tr>
<tr>
<td>Denmark</td>
<td>124.2</td>
<td>121.3</td>
<td>120.1</td>
</tr>
<tr>
<td>Sweden</td>
<td>121.2</td>
<td>122.8</td>
<td>120</td>
</tr>
<tr>
<td>Norway</td>
<td>183.7</td>
<td>179.2</td>
<td>191.2</td>
</tr>
<tr>
<td>Netherlands</td>
<td>131.2</td>
<td>132.2</td>
<td>134</td>
</tr>
</tbody>
</table>

*Figure: 4.1*

*Figures taken from the year 2008*

*Source: Eurostat*


\(^{24}\) [www.forbes.com](http://www.forbes.com)
The unemployment figures of Scandinavia and the Netherlands are low compared to the average of Europe, except for Sweden. The unemployment figure of Sweden changed after the crises of the 90’s, before that time the unemployment figure was only 1.8%

**Unemployment figures**

<table>
<thead>
<tr>
<th>Unemployment figures</th>
<th>Employment figures</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td><strong>Men</strong></td>
</tr>
<tr>
<td>Average Europe</td>
<td>9.9</td>
</tr>
<tr>
<td>Denmark</td>
<td>7.3</td>
</tr>
<tr>
<td>Sweden</td>
<td>9</td>
</tr>
<tr>
<td>Norway</td>
<td>3.3</td>
</tr>
<tr>
<td>Netherlands</td>
<td>4.1</td>
</tr>
</tbody>
</table>

*Figure 4.2
Figures are a percentage of the working force
Taken from the statistic of December 2009
Source: Eurostat*

The employment figures of Denmark, Sweden, Norway and The Netherlands are high compared to the European standard, more than 75% of the men in Scandinavia work and around 75% of women in Scandinavia work; this is high compared to the rest of Europe.
4.2 Hofstede’s cultural dimensions

Geert Hofstede's research gives insights into other cultures so that persons can be more effective when interacting with people in other countries.

The Netherlands highest Hofstede Dimension is Individuality (IDV) at 80, which ties with Canada as the fourth highest worldwide IDV ranking, behind the United States (91), Australia (90), and the United Kingdom (89). The high Individualism (IDV) ranking for the Netherlands is indicative of a society with more individualistic attitudes and relatively loose bonds with others. The population is more self-reliant and looks out for themselves and their close family members. This individuality is integrated into the daily lives of the population and must be considered when travelling and doing business in their Country. Privacy is considered the cultural norm, due to the importance of the individual within the society, individual pride and respect are highly held values and degrading a person is not well received, accepted, or appreciated.

The second highest Hofstede Dimension for the Netherlands is Uncertainty Avoidance (UAI) at 53, compared to a World average of 64. A moderate UAI score may indicate a cultural tenancy to minimize or reduce the level of uncertainty within the population by enacting rules, laws, policies, and regulations to cover most any and all situations or circumstances.

The lowest Hofstede Dimension for the Netherlands is Masculinity (MAS) at 14. This relatively low MAS Index value may be indicative of a low level of differentiation and discrimination between genders. In this culture, females are treated more equally to males in all aspects of society. This low Masculinity ranking may also be displayed as a more openly nurturing society.
Hofstede’s dimensions of the Scandinavian countries:

The above pictures show that the cultural dimensions of the Scandinavian countries and the Netherlands are quite comparable. With masculinity and power distance high in all four countries and masculinity low, these countries can be seen as identical in the cultural dimensions, except for the uncertainty avoidance index, which is ranked around 45 in the Netherlands and Norway and around 25 in Sweden and Denmark, meaning that Dutch and Norwegians are more attempting to cover uncertainties in the future.
4.3 The Dutch fashion consumer

For the average Dutch person fashion is important: they are style conscious and intend to be well dressed. Nevertheless Dutch people do not intend to spend much of their money on fashion. Of their total income Dutch people (depending on their income) spend 5 to 7.3 percent on apparel and shoes. Statistics shows that the higher the income of a person, the more they intend to spend on fashion. (Appendix:3.1)

The Netherlands is in Europe one of the countries who spend an average of the budget on fashion, having the southern and Baltic countries in front of us and leaving most of the Nordic countries behind (Appendix:3.3)

With the latest recession in mind consumers spend less money on clothing the last two years, but the consumer confidence is growing since the end of 2009 as can be seen in the picture above. The key-factors on the influence of consumer trust are employment figures, inflation, housing prices, but also psychological influences like terrorism.

---

25 www.fashionunited.com
26 Centraal bureau voor statistiek
27 Questionairre outcome
4.4 Maslow’s hierarchy of needs

When looking at buying behaviour in the Netherlands, it is first useful to analyse what the needs are of Dutch consumers in order to define this I used Maslow’s hierarchy of needs. A hierarchal approach implies that the order of development is *fixed* (that is, that a certain level must be attained before the next, higher level is activated) The implication of Maslow’s hierarchy is that one must first satisfy basics needs before progressing on the ladder.  

![Maslow's Hierarchy of Needs](image)

*Figure 4.6*  
*Maslow’s Hierarchy of Needs*  
*Adapted from: Rabolt, N & Solomon, M., 2008, Consumer behavior in fashion, Pearson education, New Jersey, USA*

*Physiological*, the lowest and broadest layer, as we all need to fulfil our needs for hunger, thirst, shelter and warmth, once fulfilled we climb up to *Safety*.

*Safety*, makes us feel safe and secure, this physiological and psychological feeling of safety needs to be fulfilled, before we can go to the next layer.

*Belonging-love*, after our basic needs are fulfilled, we need the feeling to be loved by family, friends and sometimes a lover.

*Self-esteem*, Once we feel loved, we can think of ourselves and feel respected and achieve recognition for who you are and what you do.

*Self-actualisation*, when we covered self-esteem, we feel the need to develop ourselves, to pursue our talents.

---

28 Davis, F., 1994, *Fashion, Culture and Identity*, The university of Chicago press, Chicago, USA
When looking at the Maslow pyramid, it could be said that clothing fits in every layer of the pyramid:

- **Psychological:** Clothing covers the body and protects us from elements.
- **Safety:** Clothing has restrictions to flammability; we should feel relatively safe in our clothing.
- **Belonging/love:** Fashion is something to share with and be seen by others.
- **Self-Esteem:** Wearing the latest fashion makes us feel good about ourselves or it provides us status.
- **Self-actualisation:** Express yourself with your clothing.\(^{29}\)

In the Netherlands however, the basic needs are fulfilled. This means that in the case of clothing, marketers can relate to the last three stages of the Maslow’s pyramid to develop a brands strategy. Thus you would actually speak of fashion instead of clothing or garments.

For Scandinavian fashion SMEs operating on the mid to high level, this means that belonging-love, esteem and self-actualisation, are the stages to operate on. By creating a favourable brand image, the consumer can feel accepted or higher their status.

The marketing and or branding strategies following this concept will be discussed in chapter five.

\(^{29}\) Rabolt, N & Solomon, M., 2008, *Consumer behavior in fashion*, Pearson education, New Jersey, USA
4.5 Adaption of fashion

In fashion, consumer’s reaction an adaption on fashion items are general and this can be shown in the normal fashion cycle as shown below. In the introduction stage, the trendsetters are wearing the new fashion item, later followed by the crowd, where it will move to the acceptance stage. Coming to the general acceptance the fashion item is accepted by the public but will fall in decline soon after, with the tendency to fall in the obsolescence stage, where consumers feel regression against the item.

![Normal Fashion Cycle Diagram](image)

Figure 4.7
A normal fashion cycle
Adapted from: Rabolt, N & Solomon, M., 2008, Consumer behavior in fashion, Pearson education, New Jersey, USA

In fashion the introduction stage is the stage of the catwalk and designers, where they launch new ideas of fashion, coming to the acceptance stage the product can be found at high street brands and stores, and later on in discount stores where soon it will fall back to the regression stage. As an example you can look at the “legging” a few ears ago it was only seen by a few trendsetters, now you can see a lot of women wearing it and it is for sale at H&M and C&A. Most fashion cycles can return over the decades.
However this is a normal fashion cycle, some styles become classics, those are acceptable for a longer amount of time, think of the “little black dress” many of the dress designs throughout the decades looked appropriate for today as in their time.

Next to the normal fashion cycle and the classic fashion cycle, there is the fad fashion cycle, the shortest cycle of all three. A fad is a short-lived fashion that suddenly becomes popular and quickly disappears. A fad is often adapted by a subculture, as it is of extreme design and doesn’t attract the general audience.30

Below a picture that displays the cycles of fashion, fads and classics.

Scandinavian fashion SMEs are known for their stylish, clean and somehow classic designs. This means that in general they have a longer lifecycle than the contemporary fashion of Italy, Spain or France.

30 Rabolt, N & Solomon, M., 2008, Consumer behavior in fashion, Pearson education, New Jersey, USA
4.6 Conclusion

Looking at Hofstede’s cultural dimensions, Scandinavians and Dutch people are quite similar, also the GDP and employment figures look alike. All four countries are living in a good welfare system, where unemployment figures are among the lowest of the European Union. Although the world wide recession has struck The Netherlands, Dutch consumer trust is growing again, in general Dutch consumers spend more money on clothing than the Scandinavian fashion consumers. Looking at Maslow’s pyramid of hierarchy, the Dutch people are to be targeted in the last stages of the pyramid.
Chapter 5: Marketing

This chapter discusses the entry modes and strategies an company can use to go international and how the marketing mix needs to be adapted when going international. When this is researched it will research the marketing strategies of Porter and the integrated marketing strategy.

5.1 International marketing

International marketing refers to any marketing activity that is carried out across national boundaries. The international marketer must deal with differences in the home country and the country to which it is expanding. In paragraph 5.2.1., entry modes and marketing strategies will be discussed. As well as the marketing mix which needs to be adapted for going international.

5.2.1 Entry modes and strategies

Entering a new market can be challenging and therefore it is important to have a good entry strategy. The most effective rule is to choose the most cost efficient option.

First of all the SME has to choose the country in which to expand, this first phase is called Country identification. This country would most likely be a country which it identifies itself with, within a low distance, which reduces the cultural differences. For Scandinavian brands this will be both other Scandinavian countries and next to these countries most likely the Benelux or only the Netherlands, as the Scandinavian culture is almost identical to the Netherlands and doesn’t provide barriers.

The second step is to take a more serious look at the country, looking at the macro economy, currency stability and cultural or political barriers. The preliminary screening learns that the Netherlands is an interesting market for internationalisation.

33 Baars, H.D., 1951, Scandinavie, verwant cultuurgebied, J.A. Boom & Zoon uitgevers, Meppel, Netherlands
Coming to the third phase the country is reliable to entry, but *in-depth screening* takes a closer look in order to find out how the marketing mix will look like. All this information will be for segmentation, targeting and positioning.\(^{35}\)

In the fourth phase, the *final selection*, the company takes a look at close competitors which already entered the Dutch market. The company can also look for similarities with a market the company already entered. In the case of the Netherlands it would most likely be Belgium or Germany.

The last phase is *direct experience*, by visiting the Netherlands, the company will experience the nations culture and the business practice in how the market is similar to their own country.\(^{36}\)

![The International Market Entry Evaluation Process](image)

*Figure 4.1*

*Adapted from J.K. Johansson, 2000*

Looking at the figure above the five phases a company has to follow shown in order to choose the correct country to enter. In which the most general point is the country identification and therefore starts above above.

---


Secondly the SME needs to define the entry form to enter the foreign market. The Uppsala model presents a sequential stage process for internationalizing. It starts with intermittent exports, followed by exports via agents, sales via agreements with local firms and, in the end, direct investments in the foreign market. Below different tactics that can be followed by entering a foreign market, are presented.

**Exporting**
Exporting is the most established and traditional country form of operating in a foreign country. Exporting can be defined as transferring goods produced in one country to another country. The advantages of exporting are that the manufacturing is home based, it reduces the risk of operating in a foreign country and gives the time to learn to know the foreign country without investing.

Exporting in the fashion industry means that the SME searches for an agent or company who is willing to sell the product in the foreign country. The disadvantage of this entry mode is the lack of control.

**Licensing**
Licensing is when a firm in one country agrees to permit a company in another country to use the manufacturing, trademark, know-how and other skills provided by the licensor. Licensing involves little investments and the loyalty of the partners is high because of shared profits. Licensing however is mostly for a short time and licensees can become competitors. In fashion licensing is not often used as an entry form.

**Joint venture**
Joint ventures are a more extensive form of participation than both exporting and licensing. A joint venture is an enterprise in which two or more investors share ownership. The advantages are that risks, knowledge and processing are shared as well as financial strength. The disadvantages are that partners do not have full control of management. Joint ventures are not common in the fashion industry.

**Franchise**
Franchising is the practice of using another company’s business model. (The entrepreneur is the owner, but some things, logo’s slogans or strategic decisions are pre-commited.) The franchisee exploits the brand in the foreign country by brand stores. The franchiser is able to avoid investments and to distribute goods. The advantages are that the franchisee has a high motivation because of the stake in the company. However in Europe there are no laws of franchising and is seen as a way of distributing. Franchising is a common entry form for fashion companies willing to operate more international.

---

5.1.2 Adapting the marketing mix

Internationalisation has an impact on the marketing mix. In order to make internationalisation a success, the company has to decide to keep the same marketing mix, making the marketing mix global or to specify it for the foreign market. In order to create a global brand image it is important to identify any differences between the markets in terms of distribution structure, media availability, costs, competition, norms and consumers behaviour and then adapt the marketing mix, as far as possible.

Looking at the four P’s of the marketing mix this implies that these have to be adjusted in order to be successful on the foreign market. Product, price, place and promotion need be changed to fit the chosen country.

- **Product**: Looking at the product this is a P you can’t hardly change, although sales departments need to consider style and trend preferences at the foreign market, different styles could work in the home country as well as in the chosen country.
- **Price**: Understanding value perceptions in the foreign country, the way to spend money on clothing and their adjustments to price changes needs to be considered when looking at the P of price.
- **Place**: The third P, place, needs to be looked at for points of sales. Where will the brand be sold and why is chosen for these particular points of sales. Looking at distribution the choice of channels will be direct distribution or indirect distribution.
- **Promotion**: Promotion could be the most difficult P to look at in case of internationalising. In general fashion products can be marketed with quite a standardised strategy, because their characterises can be perceived similarly in different cultural contexts. However, costumers can have different interpretations of the image of the brand.

The addition of the three P’s used in retail, also needs an adaption in order to enter the Dutch market. This needs to be adapted to the expectations Dutch fashion consumers have on retailing.

- **Personnel**: Motivated and experienced personnel
- **Process**: Processes must help get the consumers what they want
- **Physical evidence**: The added value to the products.

---


Global brands don’t need to be identical everywhere where it is sold, but a global brand should send a consistent message to their consumer that optimises the brand identity local, regional and international.\textsuperscript{40}

In order to adapt the marketing mix to the Dutch fashion market, Scandinavian fashion brands do not have to change significant points. Little changes can be made in the buying process of the products, adapting the buying process more in line with the trends and style favours of the Dutch market, sales can be increased.

The price of the product can be changed in order to fit the positioning of the brand in the Netherlands. The value perceptions in the Netherlands differ to the perceptions of Scandinavian people as they pay more tax on apparel. Also to be taken into consideration is the currency in the Netherlands, compared to the crowns in the Scandinavian countries: the euro is depreciated with respect to the three crowns.

Looking at distribution, the fashion brands need to consider where to distribute the products. In the Netherlands distribution of apparel is most common at specialist retailers and department stores.

Promotion does not need to be changed significantly. In general the fashion brands can be marketed with quite a standardised strategy in Scandinavia as well as in the Netherlands.

When looking at the case of Filippa K. it is shown that they choose to follow the same strategy in Scandinavia as well as in the Netherlands. The same products are sold in the countries. Some countries have a broader collection but prices are the same, despite of the taxes. Place and promotion don’t differ in these countries, there are flagships stores in all major cities, and sales points at cities all over the countries.

All stores are designed by the same architect Aaro Arkitektoro, to create a strong brand identity of timeless simplicity with an up-to-date twist, just as the designs of the clothing.\textsuperscript{41}

\textsuperscript{41} www.filippa-k.com
In case of Tiger of Sweden, the same strategy is followed; although Tiger of Sweden hasn’t opened any brand stores in the Netherlands they follow the same strategy all across of Europe.

The three sales points used by tiger of Sweden are brand stores, shop-in-shops and retailers. The brand stores of Tiger of Sweden can be found in the European countries Norway, Sweden, Denmark, Finland and Germany. This also counts for the shop-in-shops.\(^{42}\)

Tiger of Sweden has entered the Dutch market with sales points in exclusive stores in the Netherlands, a brand store or shop-in-shop is not expected at the moment.\(^{43}\)

\(^{42}\) [www.tigerofsweden.com](http://www.tigerofsweden.com)
\(^{43}\) [www.iccompanys.com](http://www.iccompanys.com)

---

48 | Marleen Keese
Amsterdam Fashion Institute
5.2 Porters generic strategies

In order to choose a strategy, the generic strategies of Micheal E. Porter can be chosen. The generic strategies consist of cost-leadership, focus/segmentation strategy and differentiation strategy. The focus segmentation strategy operates on a narrow market, while differentiation strategy and cost leadership strategy are operating on a broad market.

Porters 3 generic strategies are shown below in a table which explains the advantages and disadvantages of the three strategies.

![Diagram of Porters generic strategies]

*Figure 4.3 Adapted from: Porter, 2004*
5.2.1 Cost leadership strategy

Cost leadership enables the firm to conquer market share by appealing to cost-conscious or price-sensitive customers. This is achieved by having the lowest prices in the target market or at least the lowest price to value ratio (price compared to what customers receive). In order to succeed at offering the lowest price while still achieving profitability and a high return on investment, the firm must be able to operate at a lower cost level than its rivals.\(^4\)

5.2.2 Differentiation strategy

Differentiation focuses on product choice and perceived value in the eyes of the consumer. The company creates an unique and superior image of the product, and chooses one or more features that many customers see as an important part of the product.\(^5\) This specialty can be design, brand image, technology, features, dealers, network, or customer’s service which makes it possible for brands to create a sustainable competitive advantage. Differentiation strategy only works when consumers are not price sensitive and suit fashion companies since they have their own specific design signature.

5.2.3 Focus/segmentation strategy

In using the Focus/segmentation strategy the company concentrates on one or more niches in the market. A heterogeneous market can be broken down into smaller markets/niches, this segmentation of the market give brands several strategic advantages. Segments are groups of consumers with similar characteristic, there are more ways to divide these groups and there is no standard or preferred way to divide a market; however it is important that the base selected should relate to the consumers’ desires.\(^6\)

Combining multiple strategies is successful in only one case. Combining a market segmentation strategy with a product differentiation strategy is an effective way of matching your firm’s product strategy (supply side) to the characteristics of your target market segments (demand side).\(^7\)

Analysing Porters 3 generic strategies, Cost-leadership doesn’t seem attractive for a SME as it does not have the time, finance and knowledge to make it a concrete strategy. The differentiation or focus/segmentation strategies seem more attractive for a SME with Scandinavian origin. The SME can focus on their uniqueness of the brand and designs, the favourable position of country of origin and the segmentation of the consumer desires.

---

\(^7\) Porter, M. E., 2004, competitive strategy, Simon & Schuster Ltd., London, UK
5.3 Integrated marketing communications

As a marketing strategy, integrated marketing is closely related to integrated marketing communications. Integrated marketing communications aim to ensure consistency of message and the complementary use of media. However, integrated marketing is concerned with the alignment and focus of the whole organisation and should not be confused with integrated marketing communications.48

Integrated Marketing Communications (IMC) is the integration of all communication activities of a brand. Everything a company or brand does carries one singular message to all audiences that are important for the brand value.49

Within IMC there are four main tools, also known as the promotional mix, which are personal selling, public relations, advertising and sales promotion. These tools cover smaller tools which all should be integrated in the promotional mix of a company.

---

The figure below shows the integrated marketing communications mix model (IMC mix model) where it shows the opposites *one-to-one communications* and *one-to-many communications*, as well as the four elements of the promotional mix and the smaller elements covering integrated marketing communications. As shown in the figure, the elements are overlapping.

![Figure 4.3](image)

*Source: The IMC Mix model
D.Pickton, A.Broderick: Integrated Marketing Communications, Essex, Pearson Education, 2005*

**Public relations**

Public relations (PR) concerns professionals working in the field of public messaging, this is seen as a low-cost way of communication. The meaning of PR is building a good relationship with the media in the hope to be published in several media channels. There are many ways of PR, but financial, product and crisis PR are the most common, with product PR being the most important one in fashion.

In the ICM mix model PR overlaps with personal selling and advertising the smaller tools: publicity, sponsorship, stakeholder communications, lobbying, events management and product placement.
Advertising
Advertising is where the consumer is persuaded to buy a product by communication. Advertising can be done by several channels of the media, for example: written media, radio and internet. The advertisements include the name of the brand and how the product can benefit the consumer. Together with public relations and sales promotion, advertising covers the smaller tools: corporate advertising, product placement, product advertising, direct response advertising and internet.

Personal selling
Personal selling is a promotional method in which one party uses skills and techniques for building personal relationships with another party that result in both parties obtaining value. Together with Public relations and sales promotion it covers the smaller tools in the IMC mix model: counter sales, direct sales, trade sales, telemarketing, customer relations, employee-publics contact.

Sales promotion
Sales promotion is to encourage customers to buy a certain product, this to increase sales for a certain amount of time. Sales promotion is divided into two categories, costumer promotion and trade promotion. Costumer sales promotion focuses on the consumer, this includes: contest, discounts and point-of-purchase materials. These promotional materials encourage consumers to immediately purchase products and can thus increase the short term purchase. Trade sales promotion focuses on wholesalers, distributors and retailers. Price deals, sales and promotional events and sales allowances are some of the promotional tools which are used to promote the products of the company. Sales promotion overlaps with personal selling and advertising the smaller tools, direct mail, POS, packaging, promotions, merchandising and exhibitions.
One firm from Scandinavia, Sweden, which implicates integrated marketing communications very well, is the brand Björn Borg.

Björn Borg website

The brand uses every media channel to promote and distribute itself, sending one singular message to its consumers. The brand always uses the same images in the campaigns, the website, magazines, internet, television and social media. You can join, the Swedish brand on Facebook and Twitter, read the blogs and become an export product of the brand, by photographing yourself in the Björn Borg boxer short. The brand is not only sold in brand stores, also on the homepage: you can navigate yourself to the official web shop.

5.4 Conclusion

When entering a foreign market, the market entry pyramid can be used. Scandinavian fashion brands, entering the Dutch market will not face many problems or differences. The Dutch market is similar to the Scandinavian fashion countries, nevertheless the marketing mix need little adaption. Looking at Porter’s 3 generic strategies, a combination of differentiation and the focus/segmentation strategy seems most attractive for a SME. When implanting this strategy, integrated marketing communications can play an important role in communicating towards the consumer.
6: Brand management

In fashion a branding strategy can be useful to develop the brand identity and thus gain more brand awareness and brand loyalty.

6.1 Positioning

Positioning is a component of marketing: if the product or brand is well positioned it can use it as a guideline for the branding strategy. Positioning is about achieving a mental place, in other words; *a place in the minds of people*. It is the process of creating an image of the brand or product and take an important position in the minds of the target group, to create a the need for the brand or product.\(^50\)

6.2 Branding

The development of marketing and branding strategy is part of the expansion process of a fashion company. A marketing or branding strategy designed and chosen for the company can be valuable and necessary to develop the brand identity on the market and increase sales.

Since fashion is all about creating an image, branding is inevitable for fashion companies. By branding, the added values are different attributes or properties which are either tangible or intangible. This creates a sense of purpose, meaning and most important: *an image*. The accent of branding is communication, communicating a clear and consistent brand identity, this message should be familiar and positive, building brand equity. This allows the consumer to establish a strong favourable association with the brand, which helps creating a preference for the brand.\(^51\)

As mentioned, the notion of branding is to create and promote a familiar and positive image about the product. This helps to build the brand equity, the strong and highly favorable brand associations of customers and the existence of the brand in the consumers mind.


6.2.1 The CBBE model

In order to create a strong, favourable, and unique brand the Costumer Based Brand Equity Model (CBBEM) is used, which makes it possible to reach the targeted consumers most optimally. The CBBEM is build up in four stages.

![The Market Place](image)

*Figure 6.1*
Customer based brand equity model, adapted from Keller, Strategic brand management, 2003

**Salience**
The first stage is salience, this relates to the *awareness of the brand*. The goal is to ensure the correct brand identity by making the consumer aware of **who your brand is**. The reason for this is to create an identification with the brand, and an association with a specific product.\(^{52}\)

---

Performance & imagery
The second stage in the pyramid is the brand association and consists the two brand-building blocks Performance and Imagery relating to what your brand is. Performance relates to the functional or tangible needs of the product, imagery relates to the social, psychological, or intangible needs of the product. The purpose of this is to establish the brand meaning in the minds of the consumer by linking brand associations with certain properties.

Judgements & Feelings
The third stage in the pyramid is the brand evaluation and strives to establish the consumer’s judgements and feelings towards the brand, what about you. The brand evaluation consists of the two-building blocks Judgements and Feelings. Judgements are the personal preferences towards the brand and what the customer thinks of the brand: Feelings are the customer’s emotional feelings for the brand. This is the point where the consumers start reacting towards the brand. Their emotions and feelings towards this brand determine whether they will repeat the purchase and so move towards the ultimate stage, the brand loyalty.

Resonance
The fourth and final stage of the pyramid is the customer brand relationship, the strength of the relationship between the customers and the brand. This is the depth of the psychological relationship the customer has with the brand, which leads to identification, emotional attachment and involvement with the brand and at the end the brand loyalty.

The CBBE model is a generic model that can be used for branding of all kind of products. However in the case of fashion companies, as mentioned, branding is essential to build up a strong, favourable and unique brand image. Therefore it is advisable for the fashion companies to spend more time on analysing their brand and define their core brand value, and when that is established the CBBE model can be used to communicate the brand to the targeted consumers.

---

53 Davis, M., 2005, More than a brand, an introduction to branding, Thames and Hudson, London, UK
57 Rabolt, N & Solomon, M., 2008, Consumer behavior in fashion, Pearson education, New Jersey, USA
6.3 Country of Origin branding

Country branding means much more than adding a “Made in...” label to a product. A product's country of origin constitutes an important piece of branding that, in many cases, can be so influential it overtakes the brand’s other reputation builders.\(^{58}\)

Every consumer has assumptions inspired by the preconceptions it holds about a country\(^{59}\), as an example, the impression of a car would be different if the country of origin would be Germany rather than India. The assumptions the consumers have at Germany, as country of origin would be that the car is of high quality, technical advanced, good design and in generally more positive as if the car had India as country of origin. The assumptions inspired by the apparent personality of the country of origin communicate to the perceptions a consumer holds of a country.

In the case of Scandinavian fashion, this can have a positive effect on the assumptions of consumers in the Netherlands. Scandinavia is according to many countries in the world the founder of minimalistic and functional design, also known as Scandinavian Design, the Dutch consumer also holds this preconception about Scandinavia.\(^{60}\)

The product’s country of origin, in this case Scandinavia, has a reputation of design. Thus, the country of origin establishes the brand’s initial reputation.\(^{61}\) Without knowing the brand itself, the consumer can have the assumption that the products of a Scandinavian brand will be ahead in design as well as in functionality and quality. The first impression of fashion from Scandinavia would be affected by the suppositions the consumer made.

Thus, in the Netherlands the perceived image of Scandinavian countries is positive, Scandinavia stands for trendy, modern, design, quality but also social, open-minded and democratic.\(^{62}\) This is an image Dutch consumers can relate to and have positive assumptions towards.

6.4 Conclusion

In the fashion industry, branding is essential. Using the branding equity strategy, by following the CBBE model, consumers will follow different stages in the pyramid which will eventually lead to brand loyalty. Branding on ‘country of origin’ could work for Scandinavian fashion brands, as Dutch consumers have positive assumptions on Scandinavia.

---


\(^{60}\) Trycken, M., 2008, Het Deense geheim, *New Style*, retrieved from: [http://www.ambhaag.um.dk/nl](http://www.ambhaag.um.dk/nl)


Chapter 7: Conclusion and recommendation

Coming to the end of this thesis, I can write a conclusion based on the research and come with a recommendation for Scandinavian fashion brands.

7.1 Conclusion

The research question came forward from my passion for Scandinavian fashion and my surprise that it still covers a small percentage on the Dutch fashion market.

The research question is defined as:

“What is the best marketing strategy for Scandinavian small-medium fashion enterprises in the mid/high segment in the Netherlands?”

This question is followed up by the sub-questions, who and what these business from Scandinavia are, what the Dutch market and it’s consumers look like, and which marketing and branding strategies could be useful.

Scandinavian fashion in the mid-high segment, which are counting less than 250 employees are counted in the research question. A briefly introduction to the history showed, the fashion industry in Denmark, Sweden and Norway is very young, but all have intention to grow. It also concluded that Scandinavian fashion is seen as a whole, but in these countries there are differences in design and style, In Sweden it is edgy, Norway more streetstyle and the Danish fashion brands are aiming on the mainstream.

Scandinavian fashion in the Netherlands, is still a small percentage of the imported apparel to the Netherlands, nevertheless H&M takes a share of 7.1 percent on the Dutch market. Although also the Netherlands faced the world wide recession, it didn’t have too much influence on the buying behaviour in the fashion industry, Dutch consumers splendid less on clothing in 2009, but for 2010 there is already a growth expected in consumer spending.

Also during the recession the Netherlands and all Scandinavian countries belonged to the wealthiest countries in Europe as well as in the world. Unemployment figures are relatively low and employment figures are high, women in these countries are also among the working class.

Scandinavian fashion enterprises have different motives to enter the Dutch market. Entry forms most suitable for a fashion SME are exporting and franchising, however entering the Dutch market can only work when Scandinavian fashion enterprises adapt the marketing mix in order to fit the Dutch market. The distribution channels the Scandinavian fashion enterprises have to choose are specialist retailers, department stores and the relatively new distribution channel webshops, depending in what segment the brand is operating. The possibility to open a brandstore in the Netherlands could also be attractive to gain more brand awareness, however would bring
high risk and costs. The marketing research showed that out of Porters generic strategies, the most suitable for a Small-medium enterprise (SME) would be a combination of differentiation or focus/segmentation strategy, the SME can focus on the uniqueness of the brand and designs, the favourable position of country of origin and the segmentation of the consumer desires.

The advantages and importance of integrated marketing communications (IMC) is, in a fast changing society where the consumer is bored easily, that linked messages keep being reminded by the consumer and build loyalty towards the brand.

In branding, the customer based brand equity model (CBBEM), leads the consumer comfortable to brand equity by answering the questions, who are you?, what are you? What about you? And what about you and me? For Scandinavian fashion brands, branding on the country of origin could be favourable as Scandinavia is high valued in the assumptions of Dutch consumers.

7.2 Recommendation

After researched Scandinavian fashion brands and the best strategies, I would like to recommend a marketing/branding strategy for Scandinavian fashion SMEs in the mid to high segment for the Dutch fashion market.

In the Netherlands, the fashion market is crowded, it would therefore be important to have a strategy that will suite the fashion brand to stand out of the crowd.

Looking at Porters generic strategies, a combination of market segmentation strategy and the differentiation strategy is a successful combination because it matches the firms product strategy to the characteristics of the target market segments.

With the segmentation strategy, your brand is looking for niches in the market. Segments are groups of consumers with similar characteristic, which have comparable desires. The differentiation strategy focuses on the values of the product, as a company you create a perceived value in the eyes of consumers. In the case of Scandinavian fashion brands, the most important value would be design, quality, sustainability and brand image. The Dutch consumer is not highly price sensitive and therefore would like to pay more for a the superior image of the product.
To gain this perceived value of Scandinavian fashion brand, a branding strategy is needed. Looking at the CBBE model, the consumer is leaded in small steps, from salience, to performance & imaginary to Judgements & Feelings and at last: Resonance. Leading the customer trough this model will eventually lead to identification, emotional attachment and involvement with the brand and at the end the brand loyalty.

As a Scandinavian fashion brand, I would suggest to exploit the background of the fashion SME. Dutch consumers have positive assumptions towards Scandinavia, it is the founder of minimalistic and functional design, also known as Scandinavian Design. The first impression of fashion from Scandinavia would be affected by the suppositions the consumer made about the national affiliations. In the branding strategy, the Scandinavian fashion SME should communicate this origin of the brand.

Communication is an important part of branding, with IMC the tools of promotion, publics relations, advertising, personnel selling and sales promotions are integrated and therefore more effective. IMC can be defined as a set of processes that include the planning, development, execution, and evaluation of coordinated, measurable, brand communication towards it consumers.

With IMC as component of the brand equity, IMC represents the voice of the brand, therefore IMC enables the connection between the firm’s efforts and customers favorable responses. Effective IMC could be part of an effective brand equity strategy, it is widely accepted that effective communication is critical in enabling the formation of brand awareness and brand image, that is, brand equity.

This is a general recommendation for Scandinavian fashion SMEs, however when implanting this strategy, it would be advisable that every brand will research their own segment to operate on, and see what differs them from competitors.
Appendix

Appendix 1

Interview Daphne Blom
Soaked in Luxury
Koninging wilhelminaplein 13
1062 Amsterdam
The Netherlands
01-03-2010, Amsterdam

Wanneer is de verkoop in Nederland begonnen?
Sinds 7 jaar wordt het merk in Nederland verkocht. De eerste 2 jaar onder een andere naam, door het bedrijf brand Farm gedistribueerd. Sinds vijf jaar is het merk gevestigd bij IC Company en wordt het onder de naam Soaked in Luxury verkocht. Caronline Weseman is het agentuurschap dat de verkoop in Nederland regelt.

Waarom gekozen voor Nederland?
De voornaamste reden om te kiezen voor Nederland was, dat het merk wilde groeien.

Hoeveel verkooppunten in Nederland?
Er zijn 130 verkooppunten in Nederland. De bijenkorf en Houtbrox verkopen het merk, daarnaast zijn het vooral kleinere boetiekjes die het merk verkopen.

Waren er problemen bij de betreden van de Nederlandse markt?
Het merk ging vanaf het begin al heel goed in Nederland. Dit is waarschijnlijk te danken aan de pasvorm en de marktaanfluiting bij de Nederlandse vrouw.

Hoe wordt het merk gepositioneerd?
Het bevind zich in het middenklassement maar positioneert zich hoger. Dit komt omdat het merk wel luxe uitstraalt. De prijsklasse is vergelijkbaar met Vero Moda en Vila maar komt in winkels te hangen waar ze Malene Birger, Bruuns Bazaar etc verkopen. Soaked in Luxury wordt dan gebruikt als instapmerk in een winkel.

Het aantal verkooppunten wordt goed gecontroleerd en het merk ligt bijvoorbeeld niet in Men At Work om de reden dat de levensduur van het merk langer moet zijn dan een paar seizoenen. Vergeleken met trendy Italiaanse of franse merken, die een korte levensduur hebben, doordat het een hype is van een paar maanden, is Soaked in Luxury een merk dat lang meegaat. Dit komt ook door de tijdlozere cleane designs. Het merk wordt in Nederland en België wel hoger gepositioneerd dan in Denemarken.
Wat zijn de marketingactiviteiten van Soaked in Luxury?
Voor Soaked in Luxury wordt weinig budget vrijgemaakt voor marketingdoeleinden. Er zijn geen campagnes, wel wordt er veel gedaan aan free publicity. Het merk wordt regelmatig door stylistes in tijdschriften opgenomen. Hierbij is wel het probleem dat stylistes vaak de kleding kiezen, die weinig wordt ingekocht. Ook zijn er stylistes van televisieprogramma’s die Soaked in Luxury uitkiezen.
Sinds kort is er iemand bij IC Company aangenomen om de naamsbekendheid van het merk te vergroten.

Wat is de groei van Soaked in Luxury?
Hierop kon geen duidelijk antwoord worden gegeven. Wel is het merk gegroeid wat betreft verkooppunten. Het merk heeft ook weinig last gehad van de financiële crises.

Wat zijn de problemen op de Nederlandse markt?
Soaked in Luxury heeft 130 verkooppunten in Nederland, het merk wordt hoog gewaardeerd door inkopers en stylisten. Toch is de naamsbekendheid nog niet zo hoog.
Appendix 2

Interview Hanneke de Boer
Are you Swedish?
Stavangerweg 890/16a
1013 AX Amsterdam
The Netherlands
04-08-2010, Amsterdam

Sinds wanneer bestaat ‘Are you Swedish’?
2008, voordat ze haar eigen agentschap had was ze advocate.

Waarom alleen Zweedse merken?
Dit is niet strategisch of commercieel gekozen, maar kwam meer voort uit een onderbuikgevoel. Ze staat zelf ook erg achter de merken die ze verkoopt en draagt het zelf graag.

Hoe ben je benadert door de merken?
Hanneke de Boer is niet benadert door de merken, maar heeft zelf de merken benadert, dit kwam omdat ze zelf al veel contacten had met verschillende Zweedse organisaties. Ook was het een voordeel dat ze Zweeds spreekt.

Was er tussenkomst van de Zweedse Ambassade?
Nee, die was er niet. Hanneke heeft ook het idee dat Zweden haar mode industrie meer kan puschen doormiddel van de Ambassade of het Trade Council.

Hoeveel verkooppunten hebben de merken gemiddeld?
50-60, de merken worden niet verkocht bij grote ketens, maar mee in boutiques and zelfstandige retailers. Verkooppunten zijn bijvoorbeeld SPMRK and Azzuro Due. De vraag van webshops neemt steeds meer toe.

Wat zijn de sterke kanten van Zweedse mode in het algemeen?
In tegenstelling tot bijvoorbeeld de Nederlandse industrie, hebben veel Zweedse designers al een hoop ervaring, ook bij grote leerscholen. Als een designer, merk daar begint is met een alles op orde.
Ook de levering en kwaliteit van Zweedse modemerken is altijd op orde en er is en grote betrokkenheid.

Wat zijn de zwakke kanten van Zweedse mode?
Er is een vooroordeel over Zweedse maar ook Scandinavische mode, dat het alleen maar zwart, wit, grijs is.

Hoe is de naamsbekendheid van de merken die je verkoopt?
Toen Hanneke begon met haar agentschap, kende bijna niemand het niet, nu wordt de naamsbekendheid wel hoger, maar is het nog steeds niet erg hoog. Mode tijdschriften pakken het wel op, maar de Nederlandse middenmoot kent het niet.
Wat zijn de promotieactiviteiten?
Voornamelijk het generen van free publicity. Dit jaar heeft Camilla Norback ook op Amsterdam Fashion Week geshowd, wat zeker heeft meegedragen aan de naambekendheid. Ook organiseert ‘Are you Swedish’ in samenwerking met retailers en de merken verschillende ‘hapenings’

Wordt er ook voor promotie gezorgd vanuit Zweden?
Geen van de merken maakt budget vrij voor advertising.
Appendix 3

Uitgaven aan kleding

<table>
<thead>
<tr>
<th>Perioden</th>
<th>Onderwerpen</th>
<th>2008 Huiswaarde nieuwe definitie*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Gemiddeld besteed</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bedrag in euro</td>
</tr>
<tr>
<td>Totale bestedingen in euro</td>
<td>31 421</td>
<td>x</td>
</tr>
<tr>
<td>11 Voeding</td>
<td>4 813</td>
<td>x</td>
</tr>
<tr>
<td>22 Woning</td>
<td>10 911</td>
<td>x</td>
</tr>
<tr>
<td>33 Kleding en schoeisel</td>
<td>1 682</td>
<td>x</td>
</tr>
<tr>
<td>44 Hygiëne en geneeskundige verzorging</td>
<td>2 261</td>
<td>=</td>
</tr>
<tr>
<td>55 Ontwikkeling, ontspanning en verleiding</td>
<td>10 527</td>
<td>x</td>
</tr>
<tr>
<td>66 Overige bestedingen</td>
<td>946</td>
<td>x</td>
</tr>
</tbody>
</table>

© Centraal Bureau voor de Statistiek, Den Haag/Heerlen 16-4-2010

Appendix 3.1

Centraal bureau voor statistiek

<table>
<thead>
<tr>
<th>Onderwerpen</th>
<th>2008 Huiswaarde nieuwe definitie*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Periode</td>
</tr>
<tr>
<td>Huishoudstenenmerken</td>
<td></td>
</tr>
<tr>
<td>Grootte van de huishouden</td>
<td></td>
</tr>
<tr>
<td>1 persoons huishouden</td>
<td></td>
</tr>
<tr>
<td>2 persoons huishouden</td>
<td></td>
</tr>
<tr>
<td>3 persoons huishouden</td>
<td></td>
</tr>
<tr>
<td>4 persoons huishouden</td>
<td></td>
</tr>
<tr>
<td>≥ 5 persoons huishouden</td>
<td></td>
</tr>
<tr>
<td>Met minderjarige kinderen (totaal)</td>
<td></td>
</tr>
<tr>
<td>Jongste kind 0 tot 6 jaar</td>
<td></td>
</tr>
<tr>
<td>Jongste kind 6 tot 12 jaar</td>
<td></td>
</tr>
<tr>
<td>Jongste kind 12 tot 18 jaar</td>
<td></td>
</tr>
<tr>
<td>Zonder minderjarige kinderen (totaal)</td>
<td></td>
</tr>
<tr>
<td>(Slechts) kinderen onder 6 jaar</td>
<td></td>
</tr>
<tr>
<td>Meerderjarige</td>
<td></td>
</tr>
<tr>
<td>kinderen</td>
<td></td>
</tr>
<tr>
<td>Leerjaar hoofdwinnaar</td>
<td></td>
</tr>
<tr>
<td>Leerjaar hoofdwinnaar tot 45 jaar</td>
<td></td>
</tr>
<tr>
<td>Leerjaar hoofdwinnaar 45 tot 65 jaar</td>
<td></td>
</tr>
<tr>
<td>Leerjaar hoofdwinnaar vanaf 65 jaar</td>
<td></td>
</tr>
<tr>
<td>Eigenaar van een woning</td>
<td></td>
</tr>
<tr>
<td>Huurder van een woning</td>
<td></td>
</tr>
<tr>
<td>Voornaamste inkomensbron</td>
<td></td>
</tr>
<tr>
<td>Voornaamste inkomensbron (loon en winst)</td>
<td></td>
</tr>
<tr>
<td>Voornaamste inkomensbron (aanvulling totaal)</td>
<td></td>
</tr>
<tr>
<td>Voornaamste inkomensbron (aanvulling)</td>
<td></td>
</tr>
<tr>
<td>Voornaamste inkomensbron (aanvulling totaal)</td>
<td></td>
</tr>
<tr>
<td>UWU pensioen</td>
<td></td>
</tr>
<tr>
<td>Overige uitkeringen</td>
<td></td>
</tr>
</tbody>
</table>

© Centraal Bureau voor de Statistiek, Den Haag/Heerlen 16-4-2010

Appendix 3.2

Centraal bureau voor statistiek

66 | Marleen Keeseen
Amsterdam Fashion Institute
## Eurostat

### Appendix 3.3

<table>
<thead>
<tr>
<th>Country</th>
<th>Food, beverages and tobacco</th>
<th>Clothing and footwear</th>
<th>Housing, water, electricity, gas and other fuels</th>
<th>Furnishings, household equipment and services</th>
<th>Transport and communication</th>
<th>Leisure and culture</th>
<th>Other goods and services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belgium</td>
<td>15.6</td>
<td>18.2</td>
<td>5.4</td>
<td>6.3</td>
<td>26.2</td>
<td>13.9</td>
<td>6.5</td>
</tr>
<tr>
<td>Germany</td>
<td>17.3</td>
<td>19.2</td>
<td>5.5</td>
<td>6.1</td>
<td>28.4</td>
<td>20.5</td>
<td>6.4</td>
</tr>
<tr>
<td>Denmark</td>
<td>13.8</td>
<td>15.9</td>
<td>5.7</td>
<td>6.6</td>
<td>31.3</td>
<td>20.9</td>
<td>7.6</td>
</tr>
<tr>
<td>Greece</td>
<td>20.1</td>
<td>23.0</td>
<td>8.6</td>
<td>9.8</td>
<td>21.9</td>
<td>10.6</td>
<td>7.5</td>
</tr>
<tr>
<td>Spain</td>
<td>21.0</td>
<td>25.0</td>
<td>7.4</td>
<td>9.1</td>
<td>27.5</td>
<td>10.4</td>
<td>5.0</td>
</tr>
<tr>
<td>France</td>
<td>18.0</td>
<td>20.8</td>
<td>5.8</td>
<td>6.7</td>
<td>27.7</td>
<td>16.5</td>
<td>5.5</td>
</tr>
<tr>
<td>Ireland</td>
<td>23.5</td>
<td>29.2</td>
<td>6.3</td>
<td>7.8</td>
<td>27.3</td>
<td>9.7</td>
<td>4.6</td>
</tr>
<tr>
<td>Italy</td>
<td>20.9</td>
<td>24.6</td>
<td>7.5</td>
<td>8.8</td>
<td>24.7</td>
<td>11.5</td>
<td>7.6</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>12.1</td>
<td>14.8</td>
<td>5.9</td>
<td>7.2</td>
<td>27.4</td>
<td>11.2</td>
<td>6.2</td>
</tr>
<tr>
<td>Netherlands</td>
<td>12.6</td>
<td>14.3</td>
<td>6.0</td>
<td>6.8</td>
<td>26.7</td>
<td>17.1</td>
<td>7.2</td>
</tr>
<tr>
<td>Austria</td>
<td>16.0</td>
<td>17.4</td>
<td>6.6</td>
<td>7.2</td>
<td>23.9</td>
<td>17.1</td>
<td>7.2</td>
</tr>
<tr>
<td>Portugal</td>
<td>21.5</td>
<td>24.3</td>
<td>6.6</td>
<td>7.5</td>
<td>19.8</td>
<td>9.4</td>
<td>7.2</td>
</tr>
<tr>
<td>Finland</td>
<td>17.1</td>
<td>20.9</td>
<td>4.6</td>
<td>5.6</td>
<td>28.1</td>
<td>12.0</td>
<td>4.5</td>
</tr>
<tr>
<td>Sweden</td>
<td>18.3</td>
<td>21.6</td>
<td>5.2</td>
<td>6.1</td>
<td>26.8</td>
<td>13.6</td>
<td>5.0</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>13.5</td>
<td>16.8</td>
<td>5.5</td>
<td>6.6</td>
<td>28.3</td>
<td>11.9</td>
<td>7.3</td>
</tr>
<tr>
<td>Cyprus</td>
<td>19.4</td>
<td>7.6</td>
<td>9.8</td>
<td>6.6</td>
<td>19.7</td>
<td>12.3</td>
<td>14.9</td>
</tr>
<tr>
<td>Malta</td>
<td>23.8</td>
<td>8.3</td>
<td>9.0</td>
<td>10.6</td>
<td>19.4</td>
<td>17.0</td>
<td>11.9</td>
</tr>
<tr>
<td>Slovenia</td>
<td>26.9</td>
<td>8.6</td>
<td>10.7</td>
<td>7.0</td>
<td>20.0</td>
<td>14.5</td>
<td>12.2</td>
</tr>
<tr>
<td>Slovakia</td>
<td>33.4</td>
<td>9.3</td>
<td>15.8</td>
<td>6.2</td>
<td>11.2</td>
<td>13.8</td>
<td>10.3</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>26.6</td>
<td>7.0</td>
<td>17.5</td>
<td>7.7</td>
<td>13.8</td>
<td>16.1</td>
<td>11.3</td>
</tr>
<tr>
<td>Estonia (*)</td>
<td>38.0</td>
<td>7.0</td>
<td>18.0</td>
<td>5.0</td>
<td>10.0</td>
<td>10.0</td>
<td>9.0</td>
</tr>
<tr>
<td>Latvia</td>
<td>41.5</td>
<td>6.7</td>
<td>17.7</td>
<td>5.0</td>
<td>11.9</td>
<td>8.0</td>
<td>9.2</td>
</tr>
<tr>
<td>Lithuania</td>
<td>49.9</td>
<td>7.7</td>
<td>12.9</td>
<td>4.7</td>
<td>9.9</td>
<td>7.7</td>
<td>7.2</td>
</tr>
<tr>
<td>Hungary</td>
<td>30.1</td>
<td>6.7</td>
<td>20.0</td>
<td>5.3</td>
<td>16.5</td>
<td>9.5</td>
<td>11.9</td>
</tr>
<tr>
<td>Poland</td>
<td>35.3</td>
<td>6.5</td>
<td>19.1</td>
<td>5.6</td>
<td>13.9</td>
<td>8.4</td>
<td>7.7</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>53.0</td>
<td>6.1</td>
<td>13.8</td>
<td>3.9</td>
<td>9.1</td>
<td>6.8</td>
<td>7.4</td>
</tr>
<tr>
<td>Romania</td>
<td>58.0</td>
<td>6.9</td>
<td>13.0</td>
<td>3.6</td>
<td>8.4</td>
<td>3.9</td>
<td>6.2</td>
</tr>
</tbody>
</table>

(A) Including imputed rent for dwelling services
(B) Excluding imputed rent for dwelling services
(*) 3% corresponding to non-monetary consumption expenditure on non-foods items could not be broken down by COICOP divisions

Data not available
Appendix 4

Market research

Enquête

1. What is your age?
……………………………………

2. What is your gender?
0 Male
0 Female

3. What is your highest education?
0 Basis onderwijs
0 MAVO/VMBO
0 HAVO
0 VWO
0 MBO
0 HBO
0 Universitair

4. What are you earnings a month, net?
0 € 0-1000
0 € 1000-1500
0 € 1500-2000
0 € 2000-3000
0 € 3000-4000
0 € 4000-5000
0 € 5000 or more

5. What do you spend on clothing a month?
0 € 0-50
0 € 50-100
0 € 100-200
0 € 200-300
0 € 300- 400
0 € 400 – 5000
0 € 500 of meer

6. What do you think, you have spend on clothing during the recession?
0 Less than before
0 The same
0 More than before

7. Do You know any Scandinavian brand?
If yes, can you please name one?
0 Yes
……………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………
8. Do you know any of the brands listed below

(Check any you know).

0 By Malene Birger
0 Mads Nørgaard
0 Tiger of Sweden
0 ACNE
0 Bruuns Bazaar
0 BZR
0 Bitte Kai Rand
0 FIN
0 Day Birger et Mikkelsen
0 Designers Remix
0 J. Lindeberg
0 SAND
0 In-Wear/Matinique
0 Munte plus Simonson
0 Filippa K.
0 Camilla Norrback
0 Dagmar
0 Baum und Pferdgarten
0 Moods of Norway
0 Whiteout unestablished
0 Cheap Monday
0 Just Female
0 Second Female
0 Soaked in Luxury
0 Margit Brandt
0 Samsøe og Samsøe

9. Have you ever bought a Scandinavian fashion brand?

If yes, can you name one?

0 Yes(..........................................................................................)
0 No
0 I don’t know

10. If you favour Scandinavian fashion brands, can you click the reasons so?

0 Fitting
0 Design
0 Pricing
0 Quality
0 Sustainability
0 Image
0 I don’t know

11. In your opinion are there many places you can buy Scandinavian fashion brands?

0 Yes
0 No

12. If you ever bought a Scandinavian fashion brand, can you remember where?

.................................................................................
13. Would brand stores make you more aware on Scandinavian fashion brands?
0 Yes
0 No

14. Would shop-in-shops/identity corners make you more aware on Scandinavian fashion brands?
0 Yes
0 No

15. Have you ever noticed advertising on Scandinavian fashion brands?  
   (Click where you have noticed any advertising.)
   0 Written media
   0 Internet
   0 Commercials (radio, television)
   0 Outdoor advertising
   0 Never heard/ Never seen
In order to have a solid research I send out a questionnaire. This questionnaire was send to Dutch consumers and Danish consumers to research the differences. The questions where about their earnings, expenditures and knowledge of Scandinavian fashion brands. This knowledge was examined by spontaneous and perceived knowledge.

**Outcome**

**Earnings**

These were the questions:

- What are your earnings net a month?
  
  (Euros and Danish Crowns are equated to each other)
  
  € 0-1000
  € 1000-1500
  € 1500-2000
  € 2000-3000
  € 3000-4000
  € 4000-5000
  € 5000 or more

- What do you spend on clothing a month?
  
  € 0-50
  € 50-100
  € 100-200
  € 200-300
  € 300-400
  € 400-500
  € 500 or more

- During the financial crisis, how much do you think you spend on clothing?
  
  Less than before
  Same as before
  More as before
The outcome showed that the Danes earn more after tax a month, but they do not tend to spend more money on clothing. This was earlier already showed in the graphs of Eurostat.
Brand awareness

The questions in this section included:

- Do you know any Scandinavian brand?
  Yes
  No

- Do you know any of these brands?
  See brands listed below

Here you can clearly see that the brand awareness of Scandinavian brands is much higher in Scandinavia (Denmark) itself than in the Netherlands.
Willingness, ability and reasons to buy Scandinavian fashion brands

In this part, the questions were:

- Have you ever bought a Scandinavian fashion brand?
  Yes
  No

- If you favour Scandinavian fashion brands, why so?
  Fitting
  Design
  Prices
  Sustainability
  Image
  Quality
  I don’t know

- In your opinion are there many places you can buy Scandinavian fashion brands?
  Yes
  No

<table>
<thead>
<tr>
<th>Dutch</th>
<th>Danish</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heeft u ooit een Scandinavisch kledingmerk gekocht?</td>
<td>Har de nogensinde købt skandinavisk modetøj?</td>
</tr>
<tr>
<td>Ja</td>
<td>Ja</td>
</tr>
<tr>
<td>Nee</td>
<td>Nej</td>
</tr>
<tr>
<td>Weet ik niet</td>
<td>Ved ikke</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alle Scandinavische merken u aantrouwen, kunt u aanvinken waarom?</th>
<th>Hvorfor købe/køber du modetøj fra Skandinavien?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maten</td>
<td>Størrelser/Fitting</td>
</tr>
<tr>
<td>Design</td>
<td>Design</td>
</tr>
<tr>
<td>Prijs</td>
<td>Pris</td>
</tr>
<tr>
<td>Sustainability/ Duurzaamheid</td>
<td>Miljøvenlige</td>
</tr>
<tr>
<td>Image</td>
<td>Image</td>
</tr>
<tr>
<td>Kwaliteit</td>
<td>Kvaliteten</td>
</tr>
<tr>
<td>Ik weet het niet</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mener u dat er en geelt stemmer man kan kopen modetøj fra Skandinavien...</th>
<th>Zijn er naar uw mening in Nederland veel plaatsen waar je Scandinavische m...</th>
</tr>
</thead>
<tbody>
<tr>
<td>ja</td>
<td>Ja</td>
</tr>
<tr>
<td>nee</td>
<td>Nee</td>
</tr>
</tbody>
</table>

In these questions, the differences are also very clear. The Danes are of the opinion, there are many places where you can buy brands originated in Scandinavia, while the Dutch do think the opposite. The Danes are also the ones whom bought more fashion brands from Scandinavia. The reasons to buy Scandinavian fashion brands are in general the same for all consumers, these are mainly design and quality.
Advertising

- Have you ever noticed any advertising on Scandinavian fashion
  - Advertising (written media)
  - Internet
  - Commercials (television)
  - Commercials (radio)
  - Outdoor advertising
  - Never seen/heard

<table>
<thead>
<tr>
<th>Dutch</th>
<th>Danish</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Heeft u ooit reclame gezien van Scandinavische modemesjes?</strong></td>
<td><strong>Via hvilket medie har du bemærket markedsstigningen?</strong></td>
</tr>
<tr>
<td>Internet</td>
<td>- Internettet</td>
</tr>
<tr>
<td>Commercials (radio, televisie)</td>
<td>- TV</td>
</tr>
<tr>
<td>Outdoor reclame</td>
<td>- Udendørs (Russer, tage osv.)</td>
</tr>
<tr>
<td>Advertenties (geschreven media)</td>
<td>- Blåde og avisier</td>
</tr>
<tr>
<td>Nooit gezien/gehoord</td>
<td>- Ingen af overstøende</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This outcome shows that advertising is less seen in the Netherlands, more than half of the Dutch respondents haven’t ever seen, heard or even noticed advertising on Scandinavian fashion brands. In Denmark most advertising is noticed on the internet and in written media.
Bibliography and resources

Books:


Easey, M., 2008, *Fashion marketing, 3rd revised edition*, John Wiley and Sons Ltd, West Sussex, UK


Baars, H.D., 1951, *Scandinavie, verwant cultuurgebied*, J.A. Boom & Zoon uitgevers, Meppel, Netherlands

Davis, F., 1994, *Fashion, Culture and Identity*, The university of Chicago press, Chicago, USA


**Journals:**


Magazines:

Unknown, 2010, Makkelijk doen als het moeilijk kan, een onthullend onderzoek naar strategie in fashion advertising, LINK, Volume 14, p:66


Brands, M., 2009, Bruuns Bazaar 15 jaar, interview Bjørn Bruun, LINk, Volume 13, p: 48-50

Brands, M., 2007, De individuele kracht van Peak Performance, LINK, Volume 11, p: 64

Brands, M., 2007, Teamgeest en eenheid bij Filippa K., LINK, Volume 11, p:70

Brands, M., Inspiratie voor zomer 2008 van designers remix, LINK, Volume 11, p:66

Van Maurik, E., 2006, Odd Molly doet haar eigen zin, interview Per Holknekt, LINK, Volume 12, p:36

Van Maurik, E., 2006, Matinique lanceert nieuw gezicht, interview Claus Bendixen, LINK, Volume 12, p:37

Hoogervorst, M., 2006, De basis van bestseller, LINK, Volume 10, p: 66-67

Brands, M., 2006, Nieuws uit Zweden, LINK, Volume 10, p: 74


Kothler, P.; Gertner, D., 2002, Country as brand, product, and beyond: A place marketing and brand management perspective, The Journal of Brand Management, Volume 8, number 4
Surveys:

Nordic Council of Ministers Department, 2006, *Nordic design for a global market- Policies for developing the design industry in the Nordic Region*, Nordic Council of Ministers Department


CBI marketing information database, 2009, *The woven outerwear market in Denmark*, CBI, retrieved from: https://intra.amfi.hva.nl


Websites:


Norwegian fashion industry, http://www.ofw.no, (date of consultation: 02-07-2010)


Danish fashion industry, http://www.textile.dk/, (date of consultation: 26-08-2010)


Persons:

Nina Iren Hansen, Consular officer, Royal Norwegian Embassy
Lange Vijverberg 11
2513 AC Den Haag

Renate Drubbel, Commercial officer, Royal Norwegian Embassy
Lange Vijverberg 11
2513 AC Den Haag

Micheal Nord, Commercial attaché, Danish Embassy
Koninginnegracht 30
2508 CJ Den Haag

Lisa Leistra, Press, Information and Cultural Affairs, Embassy of Sweden
J.W. Frisolaan 3
2517 JS Den Haag

Emilie Møller, Project Coordinator, Danish Fashion Institute
Kronprinsensgade 13, 4.
DK-1114 Copenhagen

Anne Mai Bjerregaard, Project Assistant, Danish Fashion Institute
Kronprinsensgade 13, 4.th.
DK-1114 Copenhagen

Jannicke Hølen, Norwegian Design Council
Doga, Hausmanns Gate 16
NO-0182 Oslo

Helena Mellström, Marketing Manager, Svenska Moderådet
Drottninggatan 81A
3 tr – SE-111 60 Stockholm

Coroline Weeseman, Fashion agency: Soaked in Luxury
Koningin Wilhelminaplein 1.
4e toren (Fashion Garden), 6e verdieping, ruimte 11.

Daphne Blom, Sales person Soaked in Luxury
Koningin Wilhelminaplein 1.
4e toren (Fashion Garden), 6e verdieping, ruimte 11.

Hanneke de Boer, Fashion agency: Are you Swedish
Stavangerweg 890/17
1013 AX Amsterdam