Feasibility study on Dutch Abercrombie & Fitch store

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Executive Summary

Abercrombie & Fitch is part of Abercrombie & Fitch Co., an upscale American fashion retailer that currently operates under four different brands. With over 350 store locations in the USA, the Abercrombie & Fitch brand is close to reaching market saturation in its home country and is therefore looking for other markets to conquer. Abercrombie & Fitch Co. has been considering European expansion since the early 2000s and finally opened its first European flagship store in 2007 in London.

The research done for this thesis navigates towards a conclusion in which the following research question will be answered:

Is it feasible for Abercrombie & Fitch Co. to open an Abercrombie & Fitch flagship store in the Netherlands?

In order to answer this question, several important aspects need to be taken into account. The outcomes are presented in this report.

The **internal analysis** focuses on the strengths and weaknesses of both Abercrombie & Fitch Co. as well as the Abercrombie & Fitch brand. Abercrombie & Fitch Co. currently operates under four different brands, namely: Abercrombie & Fitch, Hollister, Abercrombie and Gilly Hicks. Out of these four brands, Abercrombie & Fitch is the most popular among Dutch consumers. The brand's attractive website and its unparalleled marketing tactics have made the brand popular even though it is not currently for sale in the Netherlands. The company is known for its quality and could make use of the existing distribution center that is located in Roosendaal. Some weaknesses of the brand are the strong top-down management and the company's inability to quickly respond to fashion trends. This makes it difficult to respond to fashion trends as quickly as some of its competitors can.

The **external analysis** examines the accessibility of the Dutch market. It is safe to say that the Dutch market is an attractive place for the company. After a couple years of economic slowdown, the Dutch economy is growing again and so is consumer spending. The Dutch consumers are Internet savvy and continue to shop online. A potential threat could be the competitors. Local and global competitors such as Scotch & Soda and Hilfiger Denim have been around a long time and have not only gained a considerable market share, but also a certain understanding of the Dutch market. Furthermore, constantly changing consumer preferences form a serious threat to the company.

The **SWOT analysis** matches all strengths, weaknesses, opportunities and threats, which leads to several strategic options. It is important that the company builds on the strengths that are already in

place. For instance, by using its marketing tactics and attractive website, the company should continue to increase its brand awareness among the Dutch consumer. Amsterdam offers a great number of potential store locations. It is important that the company looks for an A-location that corresponds with the brand image. Strengths can also be used to minimize threats. The company should continue to focus on the quality and uniqueness of its products, in order to stay ahead of its competitors. Entering a new market is never easy and, obviously bears risks. Abercrombie & Fitch should be aware of these risks and monitor them closely. Clear and realistic goals and objectives should be defined. If these goals cannot be reached, actions have to be taken.

After the findings of the internal and external analysis have been linked, it is advisable that Abercrombie & Fitch should pursue a **differentiation focus strategy**, to provide direction for subsequent operational decisions. When pursuing such a strategy, the company seeks to be unique in its industry along some dimensions that are widely valued by its segmented group of buyers. It is rewarded for its uniqueness with a premium price.

As said before, the generic strategy provides direction for all operational decisions, including those of the marketing department. The **marketing mix** used to define the company's marketing strategy includes the following seven P's:

- **Product**: It is likely that the Dutch store location will receive all of the current items in all styles and colors, as is the case with most international flagship stores. In order to avoid confusion under Dutch consumers, it is advisable that Abercrombie & Fitch will include European sizes to their clothing labels.
- **Price**: When determining a price policy for the Netherlands, it is important to pay attention to the prices used by local competitors and the customer perception of value. Taking both factors into account, it is likely that the products will be priced with a direct $-to-€ swap.
- **Place**: Amsterdam seems to be a good location to open up a flagship store. There are three shopping areas that could be of particular interest for Abercrombie & Fitch, namely: Kalverstraat, P.C. Hooftstraat and Magna Plaza.
- **Promotion**: For years and years, Bruce Weber's photographs have translated the image of Abercrombie & Fitch into something tangible.
- **Presentation**: It is important that the new Abercrombie & Fitch flagship store will not only be designed with functionality in mind, but also with the brand's overall image. The most remarkable thing about Abercrombie & Fitch stores, besides the lay out, is the use of light, sound and scent.
- **People**: Just like the company's target customer, Abercrombie & Fitch brand ambassadors should be athletic, outgoing and should never take itself too seriously. It is really important that the brand ambassadors reflect the type of lifestyle the consumers want to pursue by buying the clothes.

- **Physical Distribution**: Abercrombie & Fitch can make use of the existing distribution center that is located in Roosendaal. After unpacking and allocation the company can use contract carriers to deliver the merchandise to the Dutch store and direct-to-consumer customers.

The financial overview gives insight into the expected net sales, cost and net income. Taking into account the store size and the retail sales per average gross square foot, the new store is expected to generate an annual net sales of $8,334,000 Two thresholds were set in order to indicate low sales (expected net income 10% of net sales) and critical sales (expected net income 3% of net sales).

In order to get a better idea of how this plan should be implemented, a Gantt chart was created including all important steps that will have to be carried out. The Gantt chart shows that in Abercrombie & Fitch's case, the search for- and reconstruction of the potential location are the biggest threats to the in-time realization of the project.

Preface

This thesis was written as a part of the bachelor program at The Hague School of European Studies. It was written to finalize my studies and to show that I master the skills and knowledge acquired during the four-year bachelor program.

My passion for marketing and branding has been the main reason for choosing the subject of this thesis. To this day, I have been fascinated by the way Abercrombie & Fitch uses its racy marketing and unparalleled in-store experience to not only sell clothes, but to sell an entire lifestyle.

I first heard about the Abercrombie & Fitch brand in 2005, right after the company had opened its flagship store on Fifth Avenue. I found several advertisements featuring the work of Bruce Weber on the Internet and I remember thinking: *How does a brand manage to sell clothes by showing so little of it in its ads?*

In 2007 I got the chance to find out myself. A trip to New York City gave me the opportunity to visit the store and, of course, see if they offered something I liked. I remember spending my two last days in the city looking for the Abercrombie & Fitch store without any luck. Located between Bergdorf Goodman, Tiffany & Co. and Prada, the Abercrombie & Fitch store is the only store that does not have a window display. Instead, all windows are covered with wood panaled blinds.

While I find it quite risky to cover your store with wooden blinds when you are located in the most expensive shopping street in the world, it seems to work well for the company. Each day, the Fifth Avenue flagship store attracts thousands of visitors, most of which are tourists. Once inside, customers get to experience something that they will either love or hate; dimmed lights, loud music and dancing brand representatives.

Needless to say I love the concept. During my stay in New York City, a visit to the Fifth Avenue flagship store became a monthly, if not a weekly, habit.

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1 Introduction

1.1 Objective

Abercrombie & Fitch is part of Abercrombie & Fitch Co., an upscale American fashion retailer that currently operates under four different brands. With over 350 store locations in the USA, the Abercrombie & Fitch brand is close to reaching market saturation in its home country and is therefore looking for other markets to conquer. Abercrombie & Fitch Co. has been considering European expansion since the early 2000s and finally opened its first European flagship store in 2007. The London based flagship store has been a success from the moment it opened. In its first 6 hours of operation, the store generated a volume of $280,000 and today, the store still attracts thousands of visitors per day (Abercrombie, 2008). Since the success of the first European store, Abercrombie & Fitch has been attempting to secure locations in the rest of Europe. Last year, its Milan store opened and it will not take long before Copenhagen (2010) and Paris (2011) have their own flagship stores.

This thesis will try to answer the following central question: *"Is it feasible for Abercrombie & Fitch Co. to open an Abercrombie & Fitch store in the Netherlands?"*

In order to come to a solid conclusion, the following sub questions will be answered at some point in this research:

- What is Abercrombie & Fitch and what makes the concept so successful in the USA?
- What is the objective of Abercrombie & Fitch Co.?
- What are the strengths and weaknesses of Abercrombie & Fitch entering the Dutch market and what are opportunities and threats?
- Is there a demand for Abercrombie & Fitch in the targeted market?
- What is the best strategy for A&F to enter the Dutch market?
- How can the instruments of the marketing mix best be applied?

1.2 Research Methods

In order to write this thesis both primary and secondary research were conducted. A&F's investor newsletter provided insider information about the company and gave insight into annual reports, investor presentations and financial statements. In order to research A&F's brand awareness, a survey was conducted among 150 Dutch students. This survey was distributed using The Hague University's Blackboard, as well as the Dutch social networking site Hyves. Also, several clothing stores were visited, to give an accurate competitor analysis in chapter 4.2.

2 Company Description

2.1 History

Abercrombie Co. was founded in 1892 by David T. Abercrombie, a former prospector, miner, trapper, and railroad engineer. Eight years after opening the store, one of his customers, a successful lawyer in Kingston, New York, decided to join as partner and co-founder of Abercrombie & Fitch Co., a sporting goods store. Ezra Fitch was the visionary of the two, anticipating a clientele far broader than merely those who camped out in the course of earning a living, causing Abercrombie to resign in 1907. By this time Abercrombie & Fitch's reputation was well established. It is often said that Ernest Hemingway was a regular customer and that every president from Roosevelt to Gerald Ford, has bought Abercrombie & Fitch excursion goods. The company struggled financially from the late 1960s and was finally purchased by The Limited, Inc (now known as Limited Brands) in 1988. Under the management of Mike Jeffries, the brand repositioned itself as the "Casual Luxury" lifestyle brand in present form.

2.2 Product Portfolio

The company currently operates under four brands: Abercrombie & Fitch, Abercrombie, Hollister and Gilly Hicks. Though each of the company's brands embodies its own heritage and handwriting, they share common elements and characteristics. All brands are classic, casual, confident, intelligent, privileged and possess a sense of humor (Abercrombie & Fitch, 2008).

Abercrombie & Fitch

Founded in 1892, Abercrombie & Fitch is the company's oldest brand. The brand has gone in many different directions. While it all started as upscale sporting goods, Mike Jeffries repositioned the brand as the "Casual Luxury" lifestyle brand in its present form. The product range includes T-shirts, sweatshirts, polo shirts, pants, jeans, shorts, underwear, swimwear and accessories. Aimed at 18-22 year olds, the brand perfectly personalizes the privileged All-American college student that is confident and a little bit provocative. With net sales of $1,272,287 in 2009, the Abercrombie & Fitch brand was good for 43% of the company's total net sales (See Appendix 1). Recently, the brand has embarked on international expansion throughout various world markets (Abercrombie & Fitch, 2010).

Abercrombie

With the look of privilege and prestigious East Coast prep schools, Abercrombie is said to be the younger sibling of Abercrombie & Fitch. The brand is targeted at 7 - 14 year olds and makes up for about 12% of the company's total net sales (see Appendix 1). The trademarked term "classic cool" is used to promote the clothing on an in-store and website level. The term acts as the more juvenile version of A&F's slogan "Casual Luxury"(Abercrombie & Fitch, 2010).

Hollister

Inspired by the Californian lifestyle, Hollister is young, spirited and never takes itself too seriously. While the clothing line is comparable to Abercrombie & Fitch clothing, Hollister has lower price points compared to its parent brand. This can be explained by the fact that Hollister is targeted at 14-18 year olds. Hollister stores make up for about 48% of the total number of stores owned by Abercrombie & Fitch Co., including five stores operated in Canada and three stores in the United Kingdom (See Appendix 1). With net sales of $1,287,241 in 2009, the Hollister brand was good for 44% of the company's total net sales (Abercrombie & Fitch, 2010)

Gilly Hicks

Inspired by the free spirit of Sydney, Australia, Gilly Hicks is the only brand by Abercrombie & Fitch Co. that solely focuses on women. Gilly Hicks makes bras and underwear for the young, naturally beautiful and always-confident girl (Abercrombie, 2008). With 39 stores reported to open by the end of 2010, Abercrombie & Fitch roughly estimates that they can open a Gilly Hicks store in every place a Hollister does, which is a long-term potential for 800 Gilly stores in the United States (Moin, 2008).

2.3 Business Definition

A good way to define the business of a company is by using Derek F. Abell's three dimensional business definition framework. While the horizontal axis gives insight to the served customer groups, the vertical axis tells more about the customer functions. Listed on the inclined axis are the technologies utilized to satisfy the needs of customers.

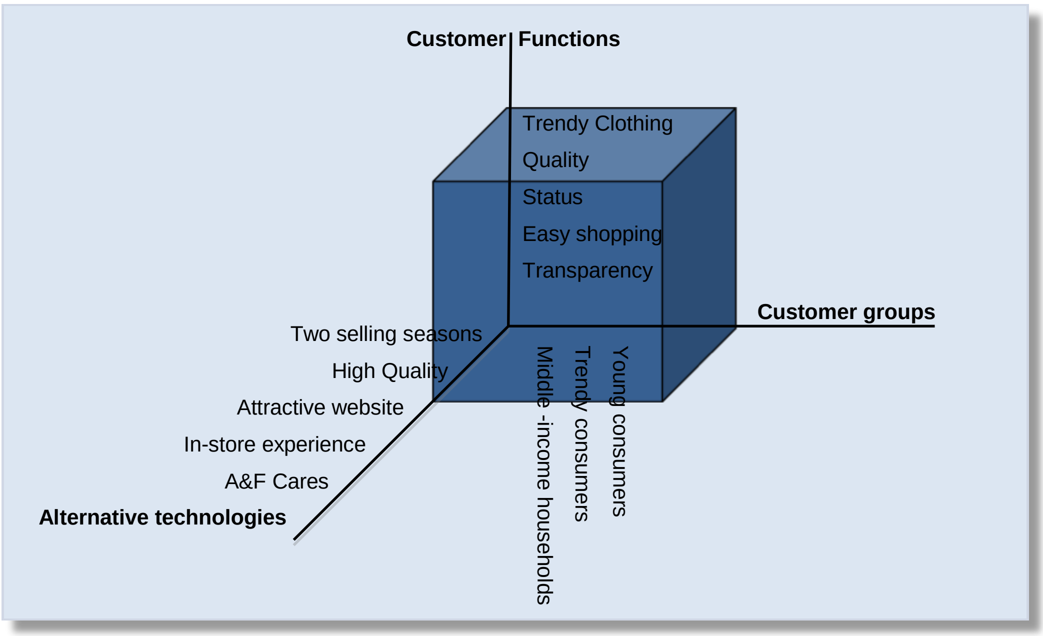

Diagram 1: Business Definition model of Derek F. Abell.

Customer Groups

The company focuses primarily on y*oung and trendy consumers.* With target a target group ranging from 18–22 year olds, Abercrombie & Fitch attracts young consumers that all share a common lifestyle. Just like the brand representatives that can be found in the stores, true Abercrombie & Fitch consumers are said to be athletic, outgoing and will never take themselves too seriously. With an annual income between $30,000 and $100,000, *Middle-income households* form an important market for affordable luxury like Abercrombie & Fitch (Mercer, 2008). These people do not normally shop at high-end luxury shops, but will accept lower-priced alternatives instead.

Customer Functions

Consumers want to look good in their clothes and be trendy at all times. Fashion trends come and go, and what is in style today could be out of style tomorrow. Another important factor is the status of the clothing. Social status is often signalled by the purchase of high cost, rare, or luxury items, the purchase of which are effectively limited to those with the wealth or status to acquire them. Today's consumer prefers easy shopping. He or she does not want to spend a lot of time in the store, nor does he or she attach value to the opinion of the sales person. Instead, family and friends are being consulted and the Internet is a commonly used tool to compare clothing and prices(HBD, 2010). Another trend in today's fashion industry is the growing demand of transparency. Consumers want to be more aware of what exactly it is they are buying.

Alternative Technologies

In order to meet the needs of its customers, Abercrombie & Fitch brings out a new line of clothes every Spring and Fall. Quality always plays a key role in the designing process of the clothing. Supplier quality standards were established in order to ensure the high quality of fabrics and other materials produced by their vendors. Even though each Abercrombie & Fitch brand has its own website including an online shop, the company believes that in-store experience is everything. Enthusiastic brand ambassadors are trained to always look like they are having fun; while at the same time they are ready to answer customers' questions. In April 2010, the company launched a special website dedicated to improve the company's transparency. On the website, the company underlines the importance of diversity & inclusion, human rights, philanthropy and sustainability.

3 Internal Analysis

This internal analysis will give insight into the internal factors that characterize the organization. Strengths and weaknesses in terms of the company's operations, marketing tactics, product portfolio and financial situation will be defined, leading to the first part of the SWOT analysis.

3.1 Operations

Abercrombie & Fitch has a strong top-down management. By pursuing a functional organizational structure, all divisions perform a specialized set of tasks while the company's senior executive officers are the ones supervising all aspects of its business. A lot of this can be explained by the company's history. When Limited Brands bought Abercrombie & Fitch in 1988, the company became a division of a larger firm, explaining the fact that its structure would look like the structure of one division of a multidivisional corporation. However, even now Abercrombie & Fitch Co. itself has become a company that owns multiple brands, the divisions still perform a specialized set of tasks without having the overview(Griffin, 2008). Even though Jeffries is widely acknowledged to be a retailing genius (Denizet-Lewis, 2006), stock analyst Robert Buchanan once said, "Abercrombie's biggest weakness is that it is all about Mike."

The company does not own or operate any manufacturing facilities and is therefore depending on third parties for the manufacture of all its merchandise. While budget wise this is a very efficient decision, the dependence on third party manufacturers automatically reflects in a long time to market (TTM), meaning the company cannot respond as quickly to fashion trends as some of its competitors.

Supplier quality standards were established in order to ensure the high quality of fabrics and other materials produced by approximately 210 vendors located primarily in Asia and Central and South America. Quality control takes place on two different levels; the company utilizes both home office as well as field employees to help monitor compliance with the company's product quality standards (Abercrombie & Fitch, 2010).

The company uses its two distribution centers in New Albany, Ohio for the distribution of merchandise to its North American stores and all direct-to-consumer customers. A third party distribution center in the Netherlands is already in place. Sited in Roosendaal, TNT fashion encompasses approximately 180,000 m² of available warehouse space and is responsible for the distribution of merchandise to its European and Asian stores (Abercrombie & Fitch Co., 2010).

3.2 Marketing tactics

It is often said that teens will be more loyal to a brand that reflects their lifestyle rather than just how teens dress (Michman, Mazze, & Greco, 2003). Consequently, the company's focus relies on selling the Abercrombie & Fitch lifestyle, rather than the products. In order to translate this lifestyle into something more tangible, Abercrombie & Fitch has hired Bruce Weber to shoot all its promotional photographs. No firm in history has applied the use of sexuality and physical beauty in marketing better than Abercrombie & Fitch.

Each store perfectly reflects the Abercrombie & Fitch lifestyle through its luxurious store environment, admirable store associates (models), and their black and white photographs featuring young people living the Abercrombie lifestyle. Furthermore, each brand has its own website that is designed to reinforce the lifestyle and to complement the in-store experience. The website includes an online shop, look book and playlist. In Fiscal 2009, the web-generated net sales represented 9.9% of the total net sales (Abercrombie & Fitch, 2010).

3.3 Product Portfolio

As discussed in Chapter 2.2, the company currently operates under four brands: Abercrombie & Fitch, Abercrombie, Hollister and Gilly Hicks. While all these brands share some characteristics, they each have their own target groups; hence little to no cannibalization can be recognized(Driscoll, 2006). This has not always been the case. When the Hollister brand was first introduced in 2000, Abercrombie & Fitch began to notice a cannibalization effect on the A&F brand (a situation in which a company's new brand eats into the revenue of older brands). As a result, the A&F merchandise began utilizing higher-grade materials and construction (and raising prices as a result) to provide more of a distinction between the two stores.

A BCG portfolio analysis is used to distinguish the cash cows from the stars, and the question marks from the dogs (See Table 3.1). Each circle in the Boston Matrix represents an A&F brand. While the volume of the circle tells something about the value of its sales, the place of the circle in the matrix tells something about its market share and market growth. Table 3.1 shows that the company currently owns three stars and one question mark. Abercrombie & Fitch, Hollister and Abercrombie are all leaders in high growth markets. They need a great deal of cash to retain their position, to support further growth and to maintain their lead. They do, however, also generate a lot of cash, because of their strengths (Brassington & Pettitt, 2006). Gilly Hicks has not yet achieved a dominant market position. The brand was launched in 2007 and is still discovering its place in the market. Gilly Hicks does not generate much cash, but absorbs a lot of cash to improve its position in the market. It is important to make sure that with all this cash going into the brand, the company keeps gaining market share, instead of retaining its current position.

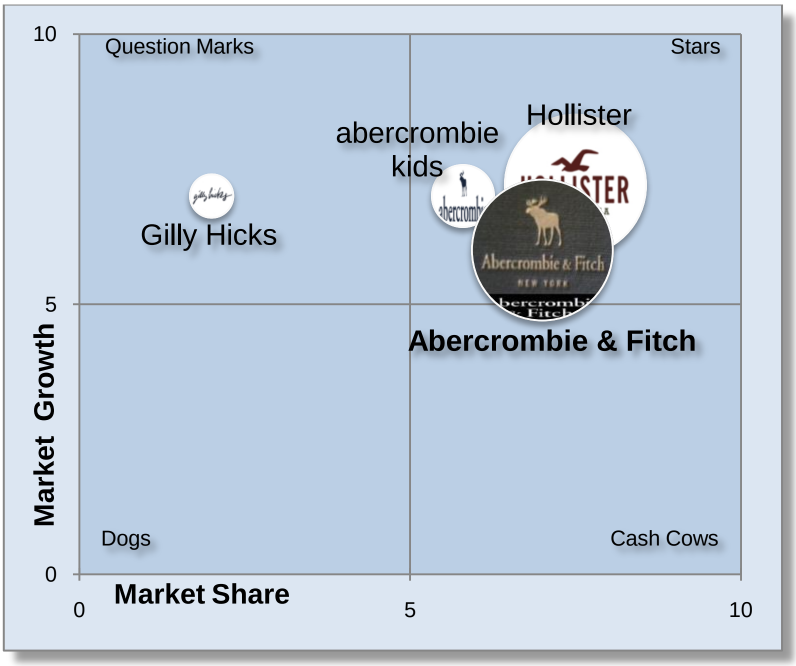

Diagram 2: Boston Matrix A&F Brands

Over the past couple of years, both Hollister and Abercrombie & Fitch have started to expand internationally. These brands are not currently for sale in the Netherlands. However Abercrombie & Fitch brand is the most popular among young consumers (Chapter 7.1).

3.4 Financial Situation

Just like most clothing brands in its league, Abercrombie & Fitch has suffered from the financial crisis that started in 2007. When the decline in consumer confidence led to a decline in consumer spending, Abercrombie & Fitch's net sales dropped with 5.8% in 2008, and 15.9% in 2009, causing several experts to call the brand "worst recession brand of 2009" (Gregory, 2009). Because the business model of Abercrombie & Fitch is not built on running a promotional business, it took the company a long time to respond to the an environment that continued to be very value and deal oriented (Jeffries, 2009). For a long time, CEO Michael Jeffries did now want to offer promotional discounts because he believed this would "cheapen the cachet of the brand". While this theory can be explained by various research findings that show a company will have a tough time increasing prices once they've lowered them, Abercrombie & Fitch did little else to entice customers. By the end of 2008, Abercrombie & Fitch finally decided to offer discounts, and continued to do so in order to boost store sales(Holmes, 2010).

Remarkable was, however, that even under these difficult circumstances, the company's financial reserves, such as working capital (Current Assets − Current Liabilities), as well as their current ratio (Current Assets / Current Liabilities) continued to grow. By addressing negative contribution stores through a combination of natural lease expirations, rent relief negotiations and, potentially early closures of certain underperforming stores, the company avoided investing money in stores that did not generate enough. This way, the operating liquidity of Abercrombie & Fitch was not affected as negatively as the net sales were (see Appendix 1).

3.5 Conclusion (SW)

With the above information about Abercrombie & Fitch and its relevant aspects, it is possible to define the strengths and weaknesses of the company.

Strengths		Weaknesses	
S1	Strong brand awareness among consumers	**W1**	Strong top – down management
S2	Attractive & profitable websites	**W2**	Long time to market of new fashion
S3	Strong brand portfolio	**W3**	Missing knowledge of Dutch markets
S4	Good distribution facilities in place	**W4**	Lack of experience with Dutch consumer (needs)
S5	Good financial reserves		
S6	Unparalleled marketing strategy		
S7	Integral quality control in place		

Table 1: Summary of Strengths / Weaknesses

4 External Analysis

The external analysis consists out of four different analyses, namely an environmental analysis, a competitor analysis, a consumer analysis and a distribution analysis.

4.1 Environmental analysis

The environmental analysis will take place on two different levels. First of all, Porter's Five Forces model will be used to define the market and to give an overview of the micro-environmental factors that affect the company's ability to serve its customers and make a profit. Furthermore, the PESTEL analysis will be used to give an indication of the framework of macro-environmental factors that have an impact on Abercrombie & Fitch entering the Dutch market.

➢ Porter's Five Forces Model

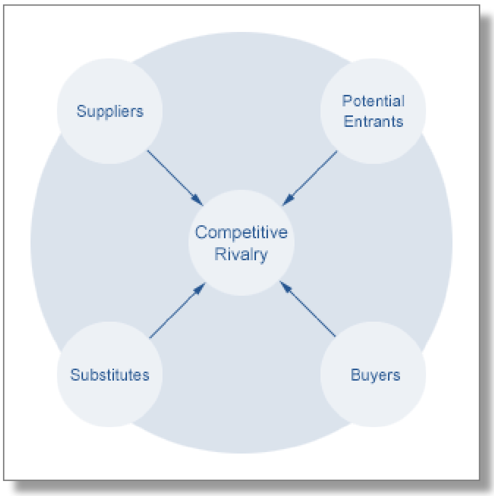

Diagram 3: Porters Five Forces Model

Bargaining power of buyers **MODERATE**

On the one hand, buyers seem to have a considerable amount of power due to the use of the Internet. The internet has made it possible for buyers to easily compare products, prices and let their voice be heard when they are unsatisfied. A bad review on Yelp for instance, could seriously damage your business. According to a survey from the National Association of Retail Marketing Services, a business loses 10 customers for every complaint it gets (Creighton, 2010). On the other hand, the existence of many substitutes in the market, takes away a big part of this power.

Bargaining power of suppliers **LOW**

The supplier power is relatively low in the apparel industry. There are numerous vendors, primarily located in Asia and Central and South America that are able to produce fabrics and other materials for a fairly low price.

Threat of substitute products MODERATE

While clothing can generally not be substituted for other products, the way in which products can be supplied has become highly substitutable because of technological developments. The emergence of online shopping is and will continuously shape traditional clothing retailer's competitive positions in the market.

Threat of new entrants LOW

The threat of new entrants is rather low. The Dutch clothing industry is made up of many large, well-established firms. While easily accessible distribution channels have made many international brands decide to take the plunge and open a store in the Netherlands. (ABN AMRO, 2009), it is hard for a new firm to enter the market with a brand that is not established and recognized. Customers continue to want what is popular and well known.

Competitive rivalry within the industry HIGH

A high degree of rivalry is a permanent given in the apparel sector. Brands such as Tommy Hilfiger, Levi's, and Scotch & Soda all sell clothes that are comparable to A&F products. These companies sell products in the same price range and offer similar styles. An extensive competitor analysis will be given in section 4.2.

- PESTEL Analysis

Political Factors

The Netherlands has a very stable political situation. While historically the Netherlands was a neutral state, since the Second World War the Netherlands became a member of a large number of international organizations, most prominently the UN, NATO and the EU. The Dutch government strongly encourages international trade.

Economic Factors

After 26 years of uninterrupted economic growth, the Netherlands' economy was hard-hit by the global economic crisis. Dutch GDP contracted 4.3% in 2009, while exports declined nearly 25% due to a sharp contraction in world demand (Central Intelligence Agency, 2010). Luckily, the economy is said to recover. The International Monetary Fund (IMF) expects a moderate recovery of the Dutch economy, with a growth rate of 1.3% of GDP for both 2010 and 2011 (Dutch Daily News, 2010). In 2008, Dutch households spent over 12 billion Euros on clothing. This comes down to €732 per capita. Women's clothes, including t-shirts, were the largest segment with over €4.6bn, followed by men's and baby's/children's wear. Compared to 2007, the total spending on clothing barely changed. (HBD, 2010).

Social Factors

Fashion trends come and go, and the modern consumer does no longer like one particular style or brand. These days it is all about combining. Cheap and expensive are mixed; vintage clothing and this year's collection are worn together (HBD, 2010). Today's consumer is fashion-conscious but finds it more important to stay true to his or her own identity. Besides clothing, accessories, fragrances and furniture are used to express this identity. Another trend in the apparel industry is the increasing number of fashion conscious men. Compared to last century, men have become more aware of how they look and what they wear (Fashion United, 2008).

Technological Factors

The Internet has become a frequently used tool to purchase products online (HBD, 2010). However, the consumer is not the only one who has become more and more Internet savvy. Information technology is heavily applied in the apparel industry. Electronic commerce has changed the way the Dutch do business. Customers are lured into databases with client registration systems, shops are automated, and competition is closely studied using benchmarking tools. Entrepreneurs will have more tools in their hands to really focus on satisfying the shopping customer (Infomat, 2006). Research conducted by HBD shows that 88% of all Dutch clothing retailers have a computer in their store, and 76% of all clothing stores own a website. The website is mostly used to publish general information (98%) or product information (67%). However, 21% of all websites include an online shop. In total, online sales of clothes and shoes were worth approximately €353m in 2008, which is 24% higher than the online sales in 2007. Online spending makes up for only 2% of total consumer spending on clothing and shoes. So relatively speaking, online shopping has not yet reached its full potential. About half of the clothing retailers use an electronic database and 50% of the clothing retailers that use such an electronic database regularly sent out emails and newsletters to their clients (HBD, 2009).

Ecologic Factors

The growing desire to protect the environment has made the consumer more aware of what they're purchasing. Transparency has become a major factor in the decision making process. It is for this reason that more and more fashion brands use ecologic fabrics and fair production (HBD, 2010).

Legal Factors

It is important that Abercrombie & Fitch gives thought to all laws and directions that apply to the company, such as: consumer laws, competition laws, employment laws and health and safety laws. An important legal factor that will have impact on the operations of Abercrombie & Fitch is the Dutch law regarding the minimum wage. When looking for local employees, the company will have to take into account the Dutch wage system. For persons between the ages of 15 and 22 The Dutch law provides a statutory minimum wage, which is fixed at a specified percentage of the minimum wage for adults. This percentage ranges from 30 to 85 per cent, depending on the age of the individual involved (Epatax, 2010).

4.2 Competitor Analysis

Abercrombie & Fitch may have been the one that made the authentic American look popular, but in the past couple of years numerous brands have jumped on the All-American bandwagon. Brands such as America Today and Scotch & Soda both sell clothes that are comparable A&F products.

Table 2 gives an overview of the six biggest competitors in the Dutch market. A comparison is made on six different levels, namely:

- *Brand recognition* (brand recognition in the Netherlands)
- *Style* (similarity in style)
- *Price* (attractiveness of the price-level of the products)
- *Company-owned stores* (amount of company-owned stores in the Netherlands in 2010)
- *Quality* (level of product quality)
- *Status* (status of clothing brand)

Brand	Brand recognition		Style		Price		Company-owned stores		Quality		Status		Score
Weight	25%		25%		5%		5%		10%		30%		100%
	score (left column) converted to weighted score (right column)												
Hilfiger Denim	5	1,25	5	1,25	3	0,15	1	0,05	4	0,40	4	1,20	4,30
G-Star RAW	4	1,00	4	1,00	1	0,05	1	0,05	5	0,50	5	1,50	4,10
Levi Strauss & Co.	5	1,25	4	1,00	4	0,20	2	0,10	5	0,50	3	0,90	3,95
Diesel	4	1,00	3	0,75	1	0,05	1	0,05	4	0,4	5	1,5	3,75
Replay	4	1,00	3	0,75	2	0,10	2	0,10	3	0,3	4	1,2	3,45
America Today	3	0,75	4	1,00	5	0,25	5	0,25	3	0,30	2	0,60	3,15
Scotch and Soda	1	0,25	5	1,25	4	0,20	1	0,05	4	0,40	2	0,60	2,75
Forecast	3	0,75	3	0,75	5	0,25	5	0,25	3	0,30	1	0,30	2,60

Table 2: Competitor Analysis

Hilfiger Denim

Hilfiger Denim is a product line by the Tommy Hilfiger Corporation. Just like the Abercrombie & Fitch brand, designs are inspired by American classics and finished with a modern edge and fresh spirit. Focused at the 18 to 28 year old denim oriented consumer, the line speaks to a younger target than the main Tommy Hilfiger label(Tommy Hilfiger Coorporation, 2010). The label consists of casual sportswear, but is slightly more "fashion forward" than the company's main label. In a research conducted by Studenten.net, Hilfiger Denim ranked 4 in the category "Popular brands for guys in 2010" (Appendix 2).

Figure 1: Interior Hilfiger Denim

G-Star RAW

Founded in 1981, G-Star RAW is a Dutch clothing company that produces fashionable urban clothing. Over the past few years, the brand has become very popular among Dutch students. While the emphasis of the company lies on jeans, the brand's hoodies, T-shirts and checkered shirts are comparable to those of Abercrombie & Fitch, and also very popular among the Dutch consumers. G-Star RAW is the most expensive brand on the list of competitors, but because status is such a determining factor, the brand is Abercrombie & Fitch's second biggest competitor. Recently, the brand ranked 2 in the category "Popular brands for guys in 2010" and 5 in the category "Popular brands for girls in 2010" in a survey conducted by Studenten.net.

Figure 2: interior G-Star RAW

Levi Strauss & Co.

Figure 3: Interior Levi Strauss & Co

Another company that focuses primarily on jeans is Levi's. What characterizes the brand, and what Abercrombie & Fitch and Levi's both have in common, is their long history and deep American roots. Levi Strauss & Co. was founded in 1853 and while the brand was hugely popular in the 50s and 60s, the brand failed to appeal to young consumers from the mid-90s. The brand has an average score on the "status meter", however, Levi's comparable products and competitive pricing has made them the third biggest competitor in the Dutch market.

Diesel

Figure 4: Interior Diesel

Another popular brand among Dutch students is the Italian clothing brand Diesel. The brand is best known for its clothing aimed at the young adult market, however not so long ago the company started selling accessories and fragrances too. While the styles of both clothing brands are not as similar as those of Hilfiger Denim and Aber-crombie & Fitch, Diesel's high level of brand recognition and status among the Dutch target group, makes the brand an important competitor.

Replay

Figure 5: Interior Replay

Another Italian clothing brand that is popular among young consumers is Replay. While the style of the clothing is much more fashion forward than that of Abercrombie & Fitch, the company's brand recognition and status have made Replay an important competitor in the Dutch market. Appendix 2 shows that Replay is more popular among men than among women.

America Today

Figure 6: Interior America Today

For a long time, America Today was one of the only stores in the Netherlands that sold Abercrombie & Fitch clothing. However, the company stopped selling Abercrombie & Fitch in 2006, after the latter had pointed out to be interested in opening company-owned stores throughout Europe. America Today sells different brands and has average brand awareness among the Dutch consumer. Furthermore, customers under 30 can get a 10% discount by showing their Dutch Euro<26 card (CJP, 2010).

Scotch and Soda

Figure 7: Interior Scotch and Soda

Founded in 1985, this Dutch clothing brand probably has the most in common with Abercrombie & Fitch when it comes to style and the importance of in-store experience. Just like Abercrombie & Fitch, Scotch & Soda produces casual shirts, T-shirts, jackets and pants. While the brand is sold in several third party stores throughout the country, each company-owned store underlines the brands character with music, scent, design and light. The company's low brand awareness translates into a low status rate.

Forecast

Figure 8: Interior Forecast

While several brands are being sold in Forecast stores, this competitor analysis solely focuses on the company's own label. The brand and offers a diverse line of basics and casuals and a denim collection for both men and women.

4.3 Consumer Analysis

To estimate the company's success in the Netherlands, it is important to find out who is a potential Abercrombie & Fitch-buyer and who is not. Hence, a profile of the typical Dutch Abercrombie & Fitch customer has to be formed.

This can be done with the help of market segmentation. By dividing the market into different segments, the company can match their strengths and offerings to those customers most likely to respond to them. In order to best define the different segments, segmentation will be based on a combination of *demographical*, *geographical*, *psycho-graphical*, *behavioral* criteria (Verhage, 2004).

Demographical criteria

As described in chapter 2.4, Abercrombie & Fitch focuses primarily on y*oung consumers.* While the brand says to personify the privileged All-American college student, the Dutch educational system is slightly different. In the US, post-secondary education is valued very highly and it is one of the main determinants of class and status. In the Netherlands, this is less common. Students in general are therefore the company's biggest target group. Their age ranges from 18-24, and their average annual income in 2008 was €5,250(Centraal Bureau voor de Statistiek, 2009). It is likely that the Dutch Abercrombie & Fitch consumer grew up in a middle-class family (B1, B2), as this class forms the most important market for affordable luxury like Abercrombie & Fitch (Mercer, 2008).

Geographical criteria

While the person described above can be found throughout the country, it is important to focus on those geographical regions where there are plenty of them. Large cities such as Amsterdam, Rotterdam and The Hague all have numerous universities and therefore a lot of students living there. These cities are crowded, easy to reach and packed with shopping and business facilities. Because of this, a lot of tourists visit these places.

Psycho-graphical criteria

To define the segment more precisely, it is necessary to look at the personality, lifestyle and so-called benefits of the company's target group. Abercrombie & Fitch seems to focus on the stereotypical college student. They generally look for their brand ambassadors by visiting fraternities, sororities and college campuses. Most of these students are accustomed to a certain lifestyle. Despite the fact that in general they are not able to spend as much money as a working person does, they are not quite ready to give up their luxurious lifestyle (Lemoine, 2010). This affects their spending pattern in such a way, that they will have to make choices. Each consumer spends his money on products and activities that he believes are important to communicate his lifestyle, and he economizes on things he finds less important (Verhage, 2004). For students, these important activities are socializing and shopping. Food, beverages and the rest of the groceries are things a student will economize on in difficult times (Ooms, 2009). The benefits these potential A&F customers are after will most likely be "looking trendy" and "gaining status".

Behavioral criteria

Behavioral segmentation is a powerful tool; however, it is also difficult to execute in practice. Because Abercrombie & Fitch does not have a store in the Netherlands, it is hard to predict things as use, brand loyalty and willingness to buy. In general, Dutch consumers have become less loyal to brands. Today's consumer is a multividual, he or she has several styles and buys many different brands (HBD, 2010). This person likes to combine inexpensive with expensive and dresses differently to work than he or she does to a party. The research I conducted among 154 adolescents showed that 63% out of all respondents had heard of the Abercrombie & Fitch brand. Out of these 97 respondents, 75% said to be interested in visiting the store if it were available in the Netherlands (see Chapter 7.1).

4.4 Distribution Analysis

When it comes to selecting an entry strategy, the company does not leave much choice. Abercrombie & Fitch does not franchise, nor is the company willing to work together in the form of a piggyback or joint venture. The company "strongly believes that the only way to provide the genuine Abercrombie & Fitch experience is to do it themselves"(Abercrombie & Fitch Co., 2010).

In this case, a company-owned operation is the only option. The company establishes its own operation directly owned and run. Company-owned operations have a couple of advantages. First of all, because the unit is directly owned, all profits go to Abercrombie & Fitch. There is no franchisee to split the profits with. Secondly, the company will have total control over the unit. In case of franchising, it is often difficult for the franchisor to control the behavior of the franchisees. Finally, the company-owned store will grow the brand name and it would in the future provide the basis for the introduction of franchising should the company wish to do so. The franchiser that establishes its own operation keeps all options open.

One must consider however, the financial and manpower resources that are needed to open a company-owned operation. Furthermore, expanding by opening its own operation in all targeted territories may face the franchisor with a number of business problems.

- Recruiting and training local staff
- Adapting to the business methods, the culture and the language, and acquiring 'street knowledge' of doing business in the target territory, the franchisor will inevitably need local people to provide the right direction in these respects;
- Acquisition, conversion and/or construction expenses;
- The problems of day-to-day supervision and control of operations from a distance (Mendelsohn, 2004).

At this point, the company owns two distribution centers (DCs), both located in New Albany, Ohio. These DCs manage the receipt, storage, sorting, packing and distribution of merchandise to its stores and direct-to-consumer customers, both regionally and internationally. Additionally, the company uses third-party DCs to handle the distribution to stores located in Europe and Asia. When it comes to the physical distribution of the goods, the Dutch store location can make use of the existing DC that is located the Netherlands. Sited in Roosendaal, TNT fashion encompasses approximately 180,000 sq m of available warehouse space and is responsible for the distribution of FILA & Abercrombie & Fitch (Abercrombie & Fitch Co., 2010).

Because Abercrombie & Fitch products are specialty goods, exclusive distribution would be a logical choice. One store location will emphasize the company's exclusiveness. It is important, however, to select a location that will best reflect the brand. Chapter 9.3 will discuss the requirements of a good location in further detail, but it is obvious that the environment of the chosen location will have a big impact on the success of the store.

4.5 Conclusion (OT)

With the above information about the market, competition, consumers and distribution it is possible to conclude which opportunities and threats exist in the current business environment.

Opportunities		Threats	
O1	Location of store as success factor	T1	Local & global competitors may decrease revenues
O2	On line marketing (internet sales)		
O3	Increasing fashion awareness of Dutch men	T2	Trends & rapidly change of buyers preferences
O4	Economic growth of consumer markets		
O5	Ability to diversify to market segment	T3	War on prices may decrease sales

Table 3: Summary of Opportunities and Threats

5 Findings of Brand Awareness Survey

In order to find out if there is a demand for Abercrombie & Fitch in the Netherlands, a questionnaire was conducted among 154 adolescents. The questionnaire was distributed using The Hague University's email channel, as well as the Dutch social networking site Hyves.

Demographics

83% of all respondents were 18-24 year old students, meaning they belong to the company's target group. Because the questionnaire was mainly distributed among HEBO students, 82% of all respondents were female and only 18% male.

Out of the 154 respondents, 63% said to have heard of the Abercrombie & Fitch brand before this survey.

Brand awareness based on gender

While it was hard to draw conclusions based on age (83% of all respondents were from the same age category), a remarkable difference could be recognized based on gender. Only 50% of the men had heard of the A&F brand before, compared to 66% of the women.

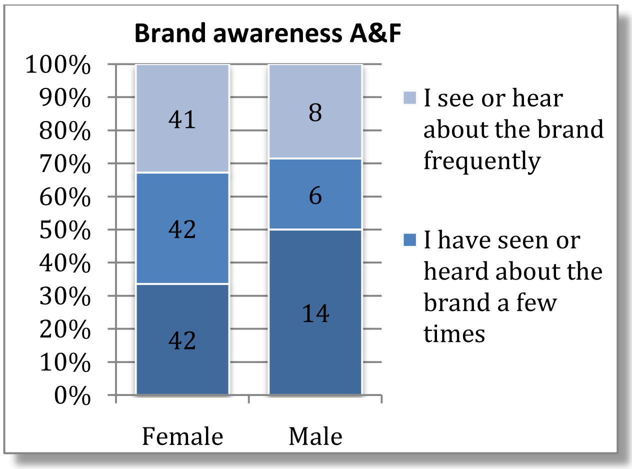

Diagram 4

Attributes associated with the brand

The 97 respondents that had heard of Abercrombie & Fitch before generally described the brand as being "preppy", "youthful" and "athletic". This corresponds perfectly with the brand's self-image.

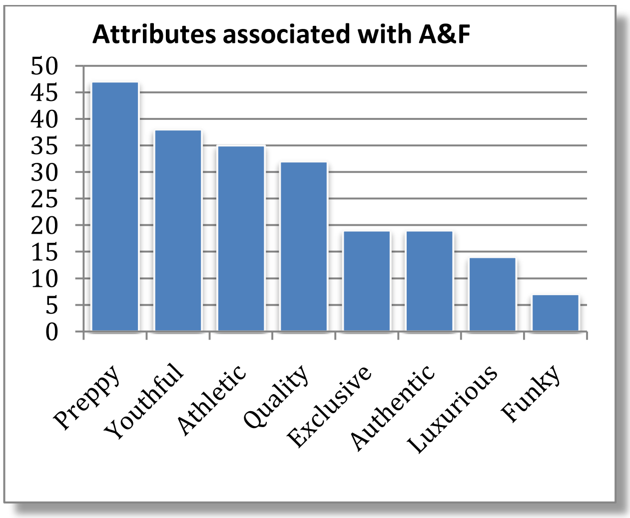

Diagram 5

Expenditures

The survey showed that 50% of all respondents spend €50 - €100 a month on clothing. 14% spends more and 36% spends less. €50 - €100 was also the average price paid for a pair of jeans.

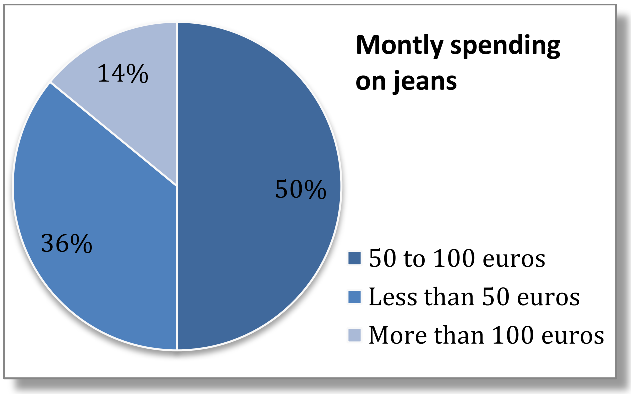

Diagram 6

Estimated spending on A&F jeans

When asked how much the respondent would spend on a pair of Abercrombie & Fitch jeans, 18% of all respondents agreed to spend more on a pair of A&F jeans than they would normally spend on a pair of jeans. 19% would spend more than €100 on a pair of A&F jeans.

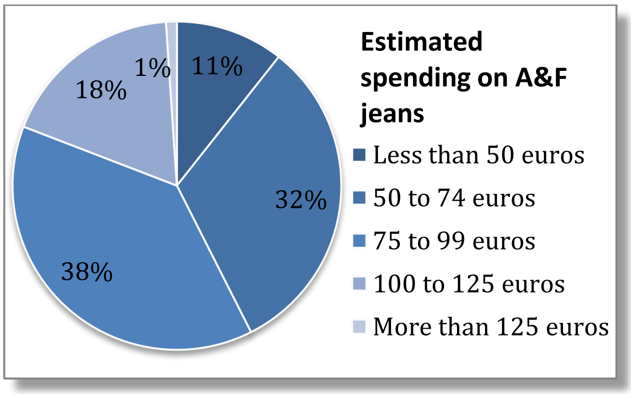

Diagram 7

Interest in Dutch A&F store

Each respondent was given a list of 10 American brands to enter the Dutch market. Respondents were allowed to select multiple brands, but were also able to select "none". Diagram 9 shows that Abercrombie & Fitch outnumbered not only its sister brand "Hollister", but also domestic competitors such as The Gap, American Eagle and Old Navy.

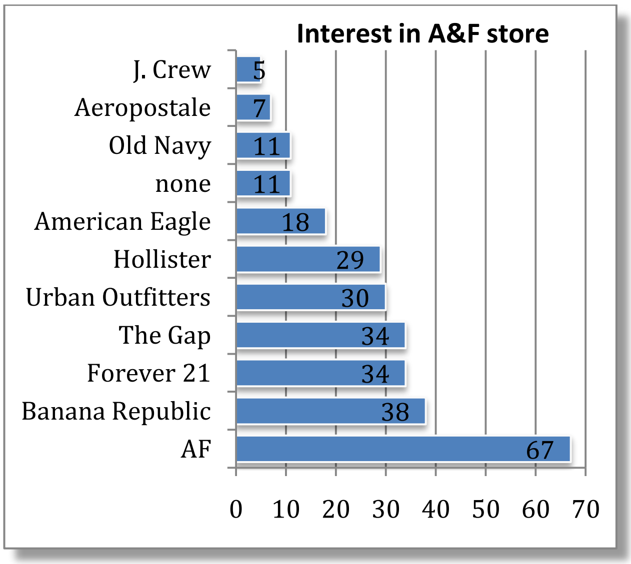

Diagram 8

Interest in Dutch A&F store

Respondents were also asked whether or not they would visit the store if it were available in the Netherlands. Diagram 10 shows that most respondents were interested in visiting the store (61%). 39% claimed to be somewhat interested, 22% was very interested.

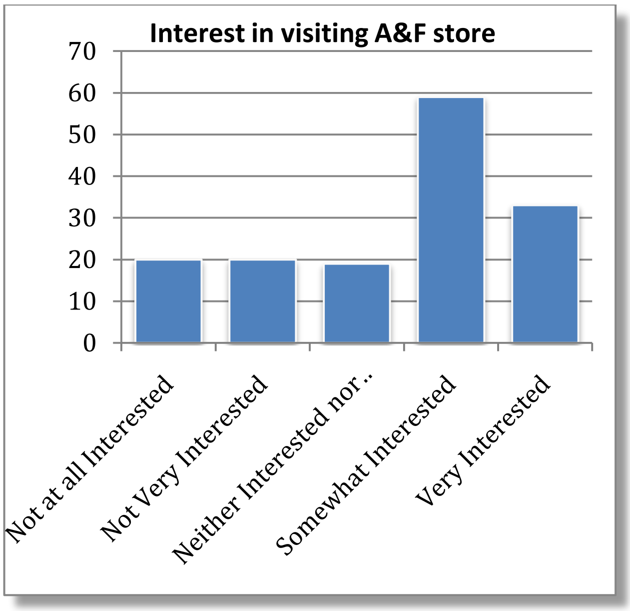

Diagram 9

6 SWOT Analysis

The SWOT analysis matches all strengths, weaknesses, opportunities and threats and will lead to several strategic options.

Internal		External	
Strengths		*Opportunities*	
S1	Strong brand awareness among consumers	**O1**	Attractive places to establish a flagship store
S2	Attractive & profitable websites	**O2**	On line marketing (internet sales)
S3	Strong brand portfolio	**O3**	Increasing fashion awareness of Dutch men
S4	Good distribution facilities in place	**O4**	Economic growth of consumer markets
S5	Good financial reserves	**O5**	Ability to diversify to market segment
S6	Unparalleled marketing strategy		
S7	Integral quality control in place		
Weaknesses		*Threats*	
W1	Strong top – down management	**T1**	Local & global competitors may decrease revenues
W2	Long time to market of new fashion	**T2**	Trends & rapidly change of buyers preferences
W3	Missing knowledge of Dutch markets	**T3**	War on prices may decrease sales
W4	Lack of experience with Dutch consumer (needs)		

Table 4: SWOT Analysis

7 Confrontation Matrix

			Strengths							Weaknesses			
			S1	S2	S3	S4	S5	S6	S7	W1	W2	W3	W4
			Strong brand portfolio	Strong brand awareness among consumers	Attractive & profitable websites	Integral quality mgmt in place	Unparal-leled marketing strategy	Good distribution facilities in place	Good financial reserves	Strong top – down manage-ment	Long time to market of new fashion	Missing knowledge of Dutch markets	Lack of experience with consu-mer needs
Opportunities	O1	Attractive places to establish a flagship store	A1				A9	A11	A13				
	O2	On line marketing (internet sales)		A5	A7		A10	A12				B2	B3
	O3	Increasing fashion awareness of Dutch men	A2										
	O4	Growing economy and consumer market	A3	A6	A8						B1		
	O5	Ability to diversify to market segment	A4									B4	B5
Threats	T1	Local & global competitors may decrease sales		C2					C5	D3			
	T2	Trends & rapidly change of buyers preferences			C3							D1	D2
	T3	War on prices may decrease revenues	C1			C4			C6	D4			

Table 5 : Confrontation Matrix

7.1 Evaluation SWOT confrontation

Strength / Opportunities quarter

A1	Each Abercrombie & Fitch Co. brand requires a different location. While Hollister stores are mostly located in shopping malls (B locations), in the case of Abercrombie & Fitch the store location is a determining factor for the company's pretentious image, and thus requires an A location.
A2	Except for Gilly Hicks, all Abercrombie & Fitch Co. brands offer a wide range of men's clothing and should therefore continue to focus on today's fashion conscious men.
A3	Because of its lower price points, the Hollister net sales increased in percentage of total net sales during the recession. Now that the economy is slowly recovering it is likely that the Abercrombie & Fitch brand will continue to play a more important role for the company.
A4	Because the company currently operates under four brands, it has the possibility to diversify to new market segments whenever the time is right.
A5	Because the brand already has some brand awareness in the Netherlands, it is probable that consumers will look for the brand online. It is important that the brand has a working and complete website in place whenever this happens.
A6	People are familiar with the brand, so it is likely that the company will immediately benefit from the growing economy and consumer market.
A7 A8	Online marketing and an online shop are already in place and can easily be deployed for the Dutch market, opening a new sales channel and increasing sales.
A9 A10	It is important that the company uses its unparalleled marketing strategies and style in both the store Dutch location as well as the Dutch website.
A11 A12	The presence of good distribution facilities will ease the supply of goods to the store and positively influence distribution to direct-to-consumers customers.
A13	Good financial reserves will facilitate the process of finding an attractive A location in Amsterdam. In the past, Abercrombie & Fitch has secured locations on Fifth Avenue, NYC and Champs Elysees, Paris.

Weaknesses / Opportunities quarter

B1	The weakness of the product's long time to market (TTM) can be compensated by the growing economy. In times of economic wealth, consumer spending will increase and TTM will become a less important factor.
B2 B3	Missing knowledge and experience of Dutch markets and customers should be a permanent subject of attention. On line sales can be used to analyze needs and develop knowledge of Dutch market and customers

B4 B5	Though this report concerns the exportation of the Abercrombie & Fitch brand, the company's strong brand portfolio makes it possible to diversify should this be necessary (Abercrombie, Hollister, and Gilly Hicks).

Strength / Threats quarter

C1	In times of economic slowdown, it is likely that Hollister will play an important role for the company. The company should focus on the lower price points of its Hollister brand and should inform the Dutch consumer about the online web shop.
C2	The brand should continue to increase its brand awareness among Dutch consumers in order to stay ahead of competition.
C3	The company should use its website to monitor sales and get an insight of current trends and the rapid change of buyers preferences.
C4	In times of economic slowdown, when other company's will start lowering prices, Abercrombie & Fitch should continue to focus on the quality and uniqueness of its products.
C5 C6	Abercrombie & Fitch Co. has a strong financial base. As recent quarterly and annual reports show, the company can survive longer periods of decreasing sales and revenues.

Weaknesses / Threats quarter

D1 D2	Unfamiliarity with Dutch market and consumer demands continuous monitoring, evaluation of sales and the adjustment of previously set targets.
D3 D4	In the case of persistent decrease of sales, revenues and irreversible losses ABF could decide to leave the Dutch market. The management has proven to be open minded with respect to negative scenario's, given recent closedowns of bad performing stores.

7.2 SWOT conclusions

The SWOT analysis shows the internal strength and weaknesses with respect to external opportunities and threats. Abercrombie & Fitch Co. owns several strong brands, has deployed a strong marketing strategy and has a good financial reserve. There are good opportunities to successfully enter the Dutch market.

8 Choice of Strategy

In 1985, Michael Porter introduced the idea of three generic strategies. Porter believes that for an organisation to obtain a sustainable competitive advantage, they should follow either one of three generic strategies. It is recommended that Abercrombie & Fitch will pursue such a generic strategy that provides the direction for subsequent operational decisions. The three strategies Abercrombie & Fitch should choose from are: cost leadership, focus and differentiation.

Through the strategy of *cost leadership*, organizations seek a cost advantage over its competitors. It is not advisable that Abercrombie & Fitch pursues this strategy. The business model of Abercrombie & Fitch was not built on running a promotional business, and according to Jeffries, it never will be (Jeffries, 2009).

Differentiation is a better suiting option. When pursuing a differentiation strategy, the company seeks to be unique in its industry along some dimensions that are widely valued by buyers. Because of the company's exceptional in-store experience and their ability to sell a certain lifestyle that is pursued by many of its customers, the company is able to raise the prices of its products. The company will thus be rewarded for its uniqueness with a premium price.

When combining this strategy with Abercrombie & Fitch's current *focus* strategy, the needs of the company's target group can be better serviced. By focusing solely on the true Abercrombie & Fitch consumer, the company is likely to enjoy a high degree of customer loyalty, and this entrenched loyalty will discourage other firms from competing directly.

9 Marketing Mix

9.1 Product

This section contains some ideas concerning the products Abercrombie & Fitch will be offering on the Dutch market. The company manages merchandising, distribution, and sales by assigning each store a tier level (1, 2, 3, 4, and 5) and a volume level (A, B, C, D and E). The store's tier level determines the product line length and depth. Tier 1 stores receive all of the current items in all styles and colors, while lower tier stores are sent less merchandise in a smaller range of sizes and colors. Depending on the size of the Dutch store location, a decision has to be made on the tier level of the store. As the company usually designates Volume A stores in major cities and tourist destinations, it is likely that the Dutch store location will maintain sufficient quantities of inventory on hand in its retail stores to offer customers a full selection of current merchandise.

The Abercrombie & Fitch size assortment is often criticized for being too small. While Abercrombie & Fitches woman's jeans range from US size 00 to size 12, in which the latter is comparable to a European size 32, most European brands range from size 26 –34. By only focusing on women with the size 32 and smaller, Abercrombie & Fitch might miss a significant part of their Dutch target group. Moreover, in order to avoid confusion under Dutch consumers, it is advisable that Abercrombie & Fitch will include European sizes to their clothing labels. In general, Dutch consumers are not familiar with US sizes. Confusion about the size could eventually lead to irritation, affecting the likelihood of purchase (d'Astous, 2000).

While it is hard to speak of the US climate in general, there are different places in the United States of America (Florida, California) where even in winter, the temperature can get as high as 60 ºF. It is in these regions where Abercrombie & Fitch sells flip-flops all year round. The Dutch climate can be characterized by the moderate maritime climate and has cool summers and mild winters. With an average temperature of 37 ºF – 39 ºF in December, January and February it is impossible to go outside with flip flops in the Netherlands. Therefore, it is advisable to keep from selling flip-flops and other summer accessories during the Dutch winter season.

9.2 Price

The company's international pricing strategy is mainly focused on the price points of other retailers in the local markets(Logan, 2009). For example, a sweater that costs $59.50 (£38.89[1]) in the US is sold for £60 in London, simply because UK consumers are willing to pay that price. While the brand is often criticized for selling its products with high mark-ups, a big part of this mark-up can thus be explained by the increased cost of operating, the prices used by the band's local competitors and the customer perception of value.

[1] The exchange rates are these on 30/04/2010, adapted from data of the European Central Bank.

Table 2 gives a brief overview of the price levels used by Abercrombie & Fitch's competitors in the Netherlands. It is important that Abercrombie & Fitch focuses on the price level of competitors that share the same status level, such as Hilfiger Denim.

From a consumer's perspective, the Dutch consumer is more price aware than the UK consumer. It is therefore advisable to drop the price level a little compared to the Savile Row shop in London. My research has pointed out that 38% of all respondents are willing to spend €75 - €99 on a pair of A&F jeans, while 20% of all respondents are willing to spend more than €100 on a pair of A&F jeans.

Taking all factors into account, it is likely that the products will be priced with a direct $-to-€ swap. This way, prices will be comparable to those of main competitor Hilfiger Denim, and the price level will correspond with the consumers' expectations.

9.3 Place

Part of the marketing mix is to get the product to the customer in the right place at the right time. Location is a very important area for decision, since if the wrong location is chosen for a store, the retailer can lose a great deal of business by failing to reach or attract the right kind of customer to generate viable level of trade (Anderson, 1993).

According to Brassington & Pettitt, the location decision-making process consists of three stages:

- Search for good locations
- Assessment of viability
- Assessment of micro factors

Search for a good location

When looking at the distribution of urbanization throughout the Netherlands, one can discover three major urbanized areas, namely Amsterdam, Rotterdam and The Hague. With a population of 767,849 in March 2010, Amsterdam is the capital and largest city of the Netherlands. Besides the high rate of urbanization, each year 4.5 million people from around the world visit the Dutch capital. Additionally, 16 million day visitors travel to Amsterdam each year.

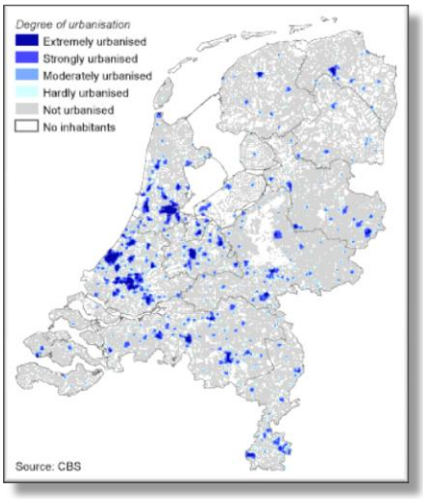

Diagram 10

Assessment of viability

Amsterdam encompasses over ninety shopping areas. While most of these shopping areas only serve the neighborhood they are in, eighteen of these shopping areas have a regional catchment area, meaning they do not only attract people from within the same area, but also people that live outside the area. In order to attract more customers, it is important that the Abercrombie & Fitch store will be located within walking distance from shops that attract the same target group. Table X shows that there are three important shopping regions in Amsterdam, those regions that include shopping streets with over 10,000 sq m of store space. These regions are: Centrum, Oud-West and Oud-Zuid. The locations that are most interesting for the Abercrombie & Fitch store are:

- Magna Plaza (Centrum)
- Kalverstraat (Centrum)
- P.C. Hooftstraat (Oud-Zuid)

Assessment of micro factors

- Kalverstraat

Figure 9: Kalverstraat

Pedestrian flows	60,300
Profile of local shops	147
Site's overall appearance	A little bit of everything
Transportation	Train, bus, tram
Price	€2,200 - €2,800

One of the busiest shopping streets of Amsterdam goes across the city center. Kalverstraat has many shops selling competitively priced products and is usually crowded. Many of Abercrombie & Fitches competitors are situated in the Kalverstraat. Crowd-pulling shops such as Bonneterie, V&D and the Bijenkorf mark the street and shopping malls Kalvertoren and Magna Plaza offer space for several big department stores.

- P.C. Hooftstraat

Figure 10: PC Hooftstraat

Pedestrian flows	5,500
Profile of local shops	91
Site's overall appearance	Luxurious and exclusive
Transportation	Bus, tram
Price	€900 - €1,500

In the last decade, the P.C. Hooftstraat has developed to become one of the most expensive shopping streets in the Netherlands. Numerous international brands have decided to open a store in this street, giving the area a more luxurious and exclusive appearance. The opening of stores such as Cartier, Chanel and Hermès caused rent prices to go up once again in 2009 (DTZ Zadelhoff, 2009). While the shopping street is not directly located in the city center, the area is easily accessible by bus and tram. Compared to the other two locations, the P.C. Hooftstraat only attracts around 5.500 pedestrians a day. This low pedestrian flow can be explained by the fact that most shops located in this street are specialty stores. The street is currently home to 91 store locations, one of them being Abercrombie & Fitches main competitor Hilfiger Denim.

➢ Magna Plaza

Figure 11: Magna Plaza

Pedestrian flows	34,500
Profile of local shops	50
Site's overall appearance	History and luxury
Transportation	Train, bus, tram
Price	€400 - €900

Magna Plaza used to be the main post office building and was transformed into the shopping mall in 1992. Designed by C.H. Peters in a Neo-Gothic style, the building is on a list of ten most important buildings in Amsterdam. This could be an important factor for Abercrombie & Fitch, as they have pointed out to be interested in landmark buildings that are unique. The shopping mall contains many clothing shops, bars and restaurants, as well as a big music store and jewelry shop. While most clothing stores are relatively exclusive (Dsquared, Dolce & Gabanna, Gucci) others (Mango, Van Dalen) are accessible for everyone. America Today, one of Abercrombie & Fitches biggest competitors is situated in Magna Plaza.

9.4 Promotion

The fourth marketing instrument is of great importance, because it will define the way in which Abercrombie & Fitch presents itself to the Dutch market. Promotion, or marketing communications, is a combination of instruments that is used to both inform your target group, as well as convince them to buy your products. As shown in Appendix 3, a well-defined communications policy consists of several steps (Verhage, 2004).

The first step in the development of an effective communications policy is to determine your target audience. For Abercrombie & Fitch, this target audience is the 18-24 year old student, who enjoys luxury but is not able to spend as much as a working person. It is often said that the youth market is a difficult group to connect with and sell to, based on the fragmented media landscape and young people's keen ability to identify and reject marketing messages that lack credibility. However, the key factor lies in offering relevant products and services while communicating a brand message in an appropriate voice and tone. Successful brands have used music, ports, fashion and video games in order to attract young consumers.

Decisions on communications policy can only really be made when the company knows exactly what it wants to achieve. Because Abercrombie & Fitch will offer existing products on a new market, it is important that with its promotional mix, the company focuses on getting the attention of those who have not heard about the company, and creates interest with those who are already familiar with the brand. The best way to do this is by setting objectives that are specific and measureable. Two examples of these objectives are:

- "Increase of brand awareness among target group from *x* to *y* in the following six months."
- "Getting one out of four target customers to visit the store within the first three months of operation."

There are many different ways to determine the promotional budget. While it is not confirmed, it is likely that Abercrombie & Fitch Co. uses the *percentage of future sales method* (Brassington & Pettitt, 2006). Appendix 1 shows that in the past few years, the company's expenses on marketing, general and administrative activities usually made up for about 10%-13% of the total net sales in the same year.

Determining the promotional mix

In order to pursue its promotional objectives, the company should make a decision on which promotional tools to use. The promotional mix distinguishes five different tools, namely: advertising, public relations, direct marketing, personal selling and sales promotion. One of the main factors to consider when selecting the different promotional tools is the place in the product life cycle (PLC). In the market introduction stage, advertising and publicity are particularly effective tools to create primary demand. A next step for Abercrombie & Fitch could be direct marketing and social media. With social media being such an important new medium it is important that Abercrombie & Fitch continues to invest in social media tools such as Hyves, Facebook and Twitter.

Diagram 11: Promotional mix

- Advertising

Like many clothing brands, the company considers the in-store experience to be its main form of marketing. Abercrombie & Fitch emphasizes the senses of sight, sound, smell, touch and energy by utilizing visual presentation of merchandize, in-store marketing, music, fragrances, rich fabrics and its sales associates to reinforce the aspirational lifestyle represented by the brand (Abercrombie & Fitch Co., 2010). The company should make sure that the Dutch store location will have exactly these characteristics, in order to best embody the brand.

The use of other media should support this existing formula. While traditional advertising (TV, radio, magazines) might seem an effective way to reach potential customers, Abercrombie & Fitch has decided to avoid these types of media. Instead, the company likes to use *outdoor advertising* to get the attention of their target group. Outdoor media can be very cost-effective. As outdoor specialists are keen to point out, young people spend a lot of time out of home and are highly mobile, making outdoor and ambient the ideal media for targeting 16- to 24-year-olds. According to Ray, it can cost £30 to reach 1,000 people through television but only £2.80 through outdoor media(Ray, 2002). Several weeks before opening their London store in 2007, traditional red buses drove through the city marked with an Abercrombie & Fitch advertisement saying "Savile Row, March 22" (See Appendix 4). Furthermore, while working on the location, a giant screen including one of Bruce Weber's photographs blocked the view of the potential store location, increasing the curiosity of all passers-by.

When opening a Dutch store, it is advisable that the company continues to invest in outdoor advertising as their main form of advertising, and that locations will be used that appeal to Dutch consumers. An example of such a location could be the tram (See Appendix 4). The Amsterdam tram network is the largest tram network in the Netherlands and one of the largest tram networks in Europe. The busiest tram line attracts 42,000 passengers a day. One can only imagine the number of people that see the advertisement when it circulates through the city (GVB, 2009).

- Public Relations

Unlike advertising, the main focus of PR lies in generating media coverage at minimal cost to the organization. As with any marketing activity, managers must be sure that PR integrates with the rest of the organization's promotional efforts, in order to be most successful. Therefore, it is important that Abercrombie & Fitch reaches out to the right editors about the store opening. The company could for instance inform all youth- and fashion magazines, fashion bloggers, and youth TV channels. Besides informing the press about happenings such as new product lines and store openings, PR is also used for long-term strategic image building, or for long-term relationship building. It is therefore important that the company keeps a close relationship with the Dutch press.

- Direct Marketing

Effective use of direct marketing increases the likelihood of follow-up purchases by existing customers, and thus positively affects the possibility of them becoming a regular customer. It is advisable that Abercrombie & Fitch keeps a database of its Dutch consumers, giving them the opportunity to receive exclusive newsletters.

- Social Media

Social media is not yet included in the traditional promotional mix; however, it was called "the new hybrid element of the promotion mix" by W. Glynn Mangolda and David J. Faulds in 2009. Having recently launched on Facebook, Abercrombie & Fitch has over a million fans. In the past three months, their fan base grew by 57% from 648,551 to 1,018,840 fans in April 2010 (Elsevier, 2010). With the Abercrombie & Fitch Facebook page being such a success, it is advisable that the company starts considering other social media tools such as Hyves, My Space and Twitter (See Appendix 5).

Developing the message

It is often said that teens will be more loyal to a brand that reflects their lifestyle rather than just how teens dress (Michman, Mazze, & Greco, 2003). Consequently, the company needs to focus on selling the Abercrombie & Fitch lifestyle, rather than the products. Luckily, Abercrombie & Fitch is expert when it comes to lifestyle marketing. The brand perfectly personalises the privileged all-

American college student that is confident and a little bit provocative. Its stores reflect this lifestyle through their luxurious store environment, admirable store associates (models), and its black and white photographs featuring young people living the Abercrombie lifestyle.

9.5 Physical distribution

As discussed in chapter 4.4 Abercrombie & Fitch can make use of the existing distribution center that is located in Roosendaal. After unpacking and allocation the garments, that company uses contract carriers to deliver the merchandise to the Dutch store and direct-to-consumer customers. The company maintains sufficient quantities of inventory on hand in its retail stores to offer customers a full selection of current merchandise. Moreover, the company attempts to balance in-stock levels and inventory turnover, and to take markdowns when required to keep merchandise fresh and current with fashion trends (Abercrombie & Fitch, 2010).

9.6 Presentation

Presentation refers to the way the store will be presented to the customers. Besides being functional, the presentation of a store should also match the company's image. Abercrombie & Fitch's *external presentation* has to meet three important conditions. First of all, Abercrombie & Fitch stores can be recognized by their white facade. Secondly, the company's logo should be placed above the entrance. Finally, all windows should be covered with wood panaled blinds. In the late 1990s, the company introduced a new store concept, one that is often referred to as the "canoe store". The interior of these canoe stores can be recognized by its grey walls, white molding, black wood floors, metal fixtures and large black and white pictures of Abercrombie & Fitch models. Each store has a "main room" in which a canoe is situated, just like each store has a moose head mounted above the cash wrap (see Appendix 6).

However, the most remarkable thing about the Abercrombie & Fitch stores is not he lay out, but it is the use of light, sound and scent. The interiors are highlighted with dim ceiling-lights and spot lighting. One iconic aspect is the lingering scent of Fierce, an A&F fragrance that is sprayed on the mannequins by employees three times a day. The distinguishing blasting electronic dance music is meant to create an exclusively fun, upbeat atmosphere particularly for the young.

9.7 People

An essential ingredient to any store is the use of appropriate staff and people. Just like the company's target customer, Abercrombie & Fitch brand ambassadors should be athletic, outgoing and should never take itself too seriously. It is important that the brand ambassadors reflect the type of lifestyle the consumers want to pursue by buying the clothes. Besides being representatives of the brand, the staff member should also have the appropriate interpersonal skills and service knowledge, to provide the service that consumers are paying for.

10 Financial Forecast

In this chapter the expected Net Sales, operating costs and net income will be calculated. All outcomes are based on a number of assumptions and principles that are described below. It is advisable for the company to frequently monitor its sales. Therefore, a method will be provided that can be used to check if financial goals are met. Finally, some solutions will be proposed in case threats arise.

10.1 Assumptions and principles

The calculations below are based on the following assumptions and principles:

- The chosen location is Magna Plaza, Amsterdam.
- The size of the store corresponds to the average size of all A&F stores (9000 SQ feet).
- The staff size corresponds to the average staff size of all A&F stores.
- Numbers, amounts, rates and proportions are based on those in fiscal year 2007. This year was used as a benchmark because it was a stable year in terms of growth and turnover.
- The following sales peaks were included in the estimated Net Sales: "Introduction of Spring Collection", "Introduction of Autumn Collection", "Summer and Christmas Holidays" and "Back to School Season".
- The expected “Opening Peak” was not included in the estimated Net Sales, as this will only occur once.
- The calculation of "Net Sales" does not take into account influences of interest rates and tax losses due to unsold inventory.

The following parameters are used as the basis for the following calculations.

- It is likely that the products will be priced with a direct $-to-€ swap. Not only is this the way the company handled things in Milan, this way prices will also be comparable to those of main competitor Hilfiger Denim.
- The size of the store is 9000 SQ feet; the average revenue per SQ-foot is $ 463 per year.
- The annual Net Sales is assigned a Value Adjustment Factor 2, meaning the Dutch store is expected to generate sales twice as high as the average Net Sales per SQ feet. This Value Adjustment Factor is based on the convenient store location and the high number of expected visitors.

10.2 Estimated Net Sales

The target Net Sales per year is calculated using the following formula:

[Floor Size] X [Average Sales per SQ Foot] X [Value Adjustment Factor]

9,000 SQ Foot X $463 / year X 2 = **$ 8.334.000**

10.3 Estimated Costs and Net Income

Table 6 gives an overview of the estimated Net Sales, Costs and Net Income.

NET SALES		$8,334,000	
Cost of sales	32.7%	$2,725,218	
GROSS PROFIT		$5,608,782	
Other income		$0	Income related to gift card balances, gains & losses on foreign currency transactions
Stores and Distribution expenses			
Payroll	$1,063,526		9 Full time, 65 part time (15 h/wk)
Rent	$940,643		Location: Magna Plaza
Utilities	$31,250		Gas, water, electricity
Depreciation and Amortization	$711,000		Furniture, fixtures, equipment, information technology, leasehold improvements, construction in progress, etc.
Other	$137,321		0.5% of total stores & distribution expenses
		$2,883,741	
Marketing, general and administrative expenses		$382,609	Photography and media ads; store marketing; information technology; outside services such as legal and consulting; relocation, as well as recruiting, samples and travel expenses.
Other expenses		$0	
Finance costs		$0	
Profit before tax		$2,342,433	
Income tax expense		$586.320	20% of $200,000 plus 25% of the rest
NET INCOME		$1,756,112	

Table 6

The Net Income is 21% of Net Sales ($1,756,112 / $8,334,000).

10.4 Monitoring and Control of Performance

The store performance can be monitored by comparing the actual sales per quarter to the expected sales per quarter. A complete overview of how the expected sales per week, quarter and per year were calculated can be found in Appendix 8.

Important selling seasons will most likely be the holiday seasons, the Back-to-School season and the seasons in which new product lines are being introduced. Because the summer season in Amsterdam attracts a lot of visitors (July, August), it is likely that during this time of the year sales will go up significantly. As typical in the apparel industry, the company is also expected to experience great sales activity during the Fall season due to the Back-to-School (August) and Holiday (November and December) selling periods (Abercrombie & Fitch, 2010).

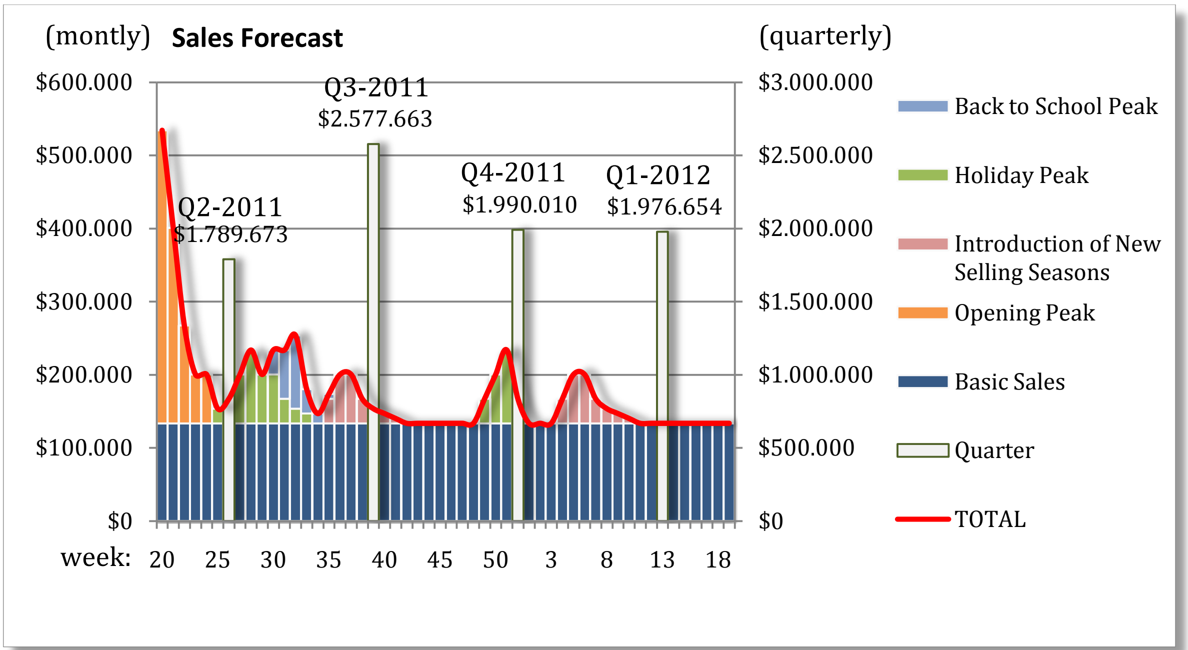

Figure 12

Quarter	Included sales peak	Net Sales
2 - 2011	Start of holiday	$ 1,789,673
3 - 2011	Holiday, Back to School & New Fall Collection	$2,577,663
4 - 2011	Holiday	$1,990,010
1 - 2012	New Spring Collection	$1,976,654
	TOTAL NET SALES, annual basis	$8,334,000

Table 7: Overview of sales peaks

10.5 Pessimistic scenarios

A pessimistic scenario can be caused by internal weaknesses as well as by external threats. See the SWOT analysis for a list of possible causes. In order to identify such threats, it is important to monitor the sales on a frequent basis. The quarterly sales report is a helpful tool for doing this. By defining thresholds for 'Low sales' en 'Critical sales' it becomes possible to measure the performance of the store and to respond with appropriate measures when the given thresholds are exceeded.

In the following examples, the thresholds for 'Low sales' and 'Critical Sales' are assumed to be a Net Income of 10% and 3% of Net Sales respectively.

'Low' and 'Critical sales scenarios

The Low Sales threshold will be reached when Net Income is 10% of Net Sales. This is the case when Net Sales drops to $6,493,673 and the resulting Net Income drops to $833,400.

The Critical Sales threshold will be reached when Net Income is 3% of Net Sales. This is the case when Net Sales drops to $ 5,330,136 and the resulting Net Income drops to $250,020.

The quarterly Net Income of 'Low Sales' and 'Critical Sales' scenario's can be calculated by interpolation, resulting in the following thresholds:

Period	Target Sales based on 21% Net Income	Low Sales thresholds (10% Net Income)	Actual Sales thresholds (3% Net Income)
Q2 (ending week 26)	$1,789,673	$1,394,475	$1,144,612
Q3 (ending week 39)	$2,577,663	$2,008,459	$1,648,583
Q4 (ending week 52)	$1,990,010	$1,550,572	$1,272,741
Q1 (ending week 13)	$1,976,654	$1,540,166	$1,264,199
Annual Sales	$8,334,000	$6,493,673	$5,330,136

Table 8: Target Net Sales with thresholds for 'Low Sales' and 'Critical Sales'

Based on these thresholds it is possible to check on a quarterly basis whether the target sales are met. If these sales are not achieved, it is important to identify the cause(s) and to undertake the necessary steps.

'Low Sales' thresholds exceeded

After sales have dropped below this threshold, the sales level has reached the level of an average store. While this is perfectly fine for the average Abercrombie & Fitch store in e.g. Atlanta, Georgia, it is not acceptable for an international flagship store to perform this way. Therefore the following solutions should be considered whenever this happens:

CAUSE	OPERATION
Too many competitors with lower price levels	A&F should emphasize on the quality and uniqueness of its products.
Letdown of actual brand awareness	A&F should continue to invest in advertising regarding brand.
Lack of total visitors in first weeks of operation	A&F should continue to invest in outdoor advertising, in public places with lots of passers-by.
Lack of visitors from target group in first weeks of operation	A&F should continue to invest in outdoor advertising in places where target customers go (specific events, campus, etc).

Table 9: Possible causes of 'Low Sales'

'Critical Sales' thresholds exceeded

When getting to this point, the Dutch Abercrombie & Fitch store is underperforming. The company should analyze whether the low performance is temporary or structural. Where possible, actions should be undertaken to improve the situation. When there are no possibilities for improvement, A&F should consider its position.

CAUSE	OPERATION
General slowdown in economic activity	A&F should not undertake action, but wait for market recovery.
Audience is not achieved	A&F should continue to invest in advertising in places where target customers go (specific events, campus, etc). Re-evaluate after 6 months.
Image damage, not repairable	Discontinuous operations, store closing

Table 10: Possible causes of 'Critical Sales'

11 Conclusion

11.1 Answer to main question

The research done in this thesis was navigated towards a conclusion in which the following research question can be answered: "*Is it feasible for Abercrombie & Fitch Co. to open an Abercrombie & Fitch store in the Netherlands?"*

Debating all relevant in- and external aspects related to the company and the Dutch apparel market, it is clear that the Dutch apparel market is ready for Abercrombie & Fitch. Not only is there a significant demand for the brand, other environmental factors turned out to be rather attractive, too. Over the past few years, consumer spending on clothes has been stable in the Netherlands. The Dutch are very open to international brands and keen to try new things. While there are different competitors on the Dutch market, Abercrombie & Fitch is one of a kind and it is likely that the company's in-store experience will presently surprise the Dutch consumers who have never visited an Abercrombie & Fitch store before. Furthermore, the company can make use of existing distribution channels, such as the third party Distribution Center that is located the Netherlands.

Another question to consider however is whether or not Abercrombie & Fitch Co. is ready to enter the Dutch apparel market. In order to expand, a company will have to be financially healthy. The past few years have not been good for the company. Abercrombie & Fitch seemed to be intensely hit by the crisis that occurred in 2007. While the business model of Abercrombie & Fitch was not built on running a promotional business, the company finally decided to offer specially targeted attractive price points in response to an environment that continued to be very value and deal oriented (Jeffries, 2009). While this had some effect, the company still felt it was necessary to close a significant number of underperforming stores.

Luckily, the economy is expected to recover. With a growth rate of 1.3% of GDP for both 2010 and 2011, right now seems to be the time to open up a store in the Netherlands (Dutch Daily News, 2010). Furthermore, the company's annual report shows that international store locations have outperformed the US store locations. Opening a store in the Netherlands could therefore be a great way to respond to this positive trend.

11.2 Answers to sub questions

This subchapter will also be used to answer the sub questions that were noted in section 1.1.

- What is Abercrombie & Fitch and what makes the concept so successful in the USA?

Abercrombie & Fitch is one of the four brands owned by American fashion retailer Abercrombie & Fitch Co. Founded in 1892, Abercrombie & Fitch is the company's oldest brand. The brand is aimed at 18-22 year olds and perfectly personalizes the privileged All-American college student that is confident and a little bit provocative.

The company believes that in-store experience is everything. It emphasizes the senses of sight, sound, smell, touch and energy by utilizing visual presentation of merchandize, in-store marketing, music, fragrances, rich fabrics and its sales associates to reinforce the aspirational lifestyle represented by the brand (Abercrombie & Fitch Co., 2010).

- What is the objective of Abercrombie & Fitch Co.?

With over 350 store locations in the USA, the company is close to reaching market saturation in its home country and is therefore looking for new markets to conquer. Mike Jeffries has pointed out that international expansion will be done through flagship concept only. By opening different flagship stores throughout the world, Abercrombie & Fitch Co. is hoping to increase its market share and revenue.

- What are the strengths and weaknesses of Abercrombie & Fitch entering the Dutch market and what are opportunities and threats?

While a complete overview of strengths, weaknesses, opportunities and threats can be found in chapter 6, it is clear that there is a strong demand for Abercrombie & Fitch among the Dutch target group. With the Dutch economy stabilizing and Amsterdam offering a great number of potential store locations, opening a store in the Netherlands seems to be feasible. The brand has an attractive and profitable website, something that is of great importance now that the online sales are constantly going up. Of course, Abercrombie & Fitch has to deal with some threats too. Local and global competitors such as Scotch & Soda and Hilfiger Denim have been around a long time and have not only gained a considerable market share, but also a certain understanding of the Dutch market. Furthermore, constantly changing consumer preferences could lead from being popular on one day, to being out of style the next. While most of these threats can partly be overcome with the help of Abercrombie & Fitch's marketing tactics, it is important to be aware of the risks and monitor them closely.

- Is there a demand for Abercrombie & Fitch in the targeted market?

A survey among 154 students has pointed out that there is high brand awareness in the Dutch market. The 97 respondents that had heard of Abercrombie & Fitch before generally described the brand as being “preppy”, “youthful” and “athletic”. This corresponds perfectly with the brand’s self-image. When given a list of 20 American brands to enter the Dutch market, Abercrombie & Fitch got the most votes. 61% of all respondents said to be interested in visiting the store if it were to become available, out of which 36% indicated to be very interested.

- What is the best strategy for A&F to enter the Dutch market?

Abercrombie & Fitch believes that the only way to provide a genuine Abercrombie & Fitch experience is to do it themselves. This means the company is not willing to enter the Dutch market through franchising, licensing or alliances. The Dutch store will be a company-owned one.

- How can the instruments of the marketing mix best be applied?

Product: It is likely that the Dutch store location will receive all of the current items in all styles and colors, as is the case with most international flagship stores. In order to avoid confusion under Dutch consumers, it is advisable that Abercrombie & Fitch will include European sizes to their clothing labels.

Price: When determining a price policy for the Netherlands, it is important to pay attention to the prices used by local competitors and the customer perception of value. Taking both factors into account, it is likely that the price level will be comparable with the price level of Hilfiger Denim.

Place: Amsterdam seems to be a good location to open up a flagship store. There are three shopping areas that could be of particular interest for Abercrombie & Fitch, namely: Kalverstraat, P.C. Hooftstraat and Magna Plaza.

Promotion: For years and years, Bruce Weber’s photographs have translated the image of Abercrombie & Fitch into something tangible.

Presentation: It is important that the new Abercrombie & Fitch flagship store will not only be designed with functionality in mind, but also with the brand’s overall image. The most remarkable thing about Abercrombie & Fitch stores, besides the lay out, is the use of light, sound and scent.

People: Just like the company’s target customer, Abercrombie & Fitch brand ambassadors should be athletic, outgoing and should never take itself too seriously. It is really important that the brand ambassadors reflect the type of lifestyle the consumers want to pursue by buying the clothes.

Physical Distribution: Abercrombie & Fitch can make use of the existing distribution center that is located in Roosendaal. After unpacking and allocation the company can use contract carriers to deliver the merchandise to the Dutch store and direct-to-consumer customers.

12 Implementation

In this chapter, the implementation of the proposed export plan will be discussed in further detail. A Gantt chart was created including all important steps that must be carried out in order to get to the final result: the opening of a Dutch A&F store (See Appendix 7).

Gantt Charts are useful tools for analyzing and planning more complex projects because they give a clear overview of when tasks will be carried out and they help work out the critical path for a project that must be completed by a particular date. Appendix 7 shows that in this case, the search for- and reconstruction of the potential location are the biggest threats to the in-time realization of the project.

Location

Because Abercrombie & Fitch has pointed out to be interested in landmark buildings that are unique like the Savile Row shop in London, it might take a while to secure a location that lives up to the company's wants and needs (L01). Once NB Real Estate has found some potential locations, both parties will gather around the table and discuss what's best for the brand (L02). After having made a decision regarding the location, it will take a while before the company can start reconstructing. This gap between deciding on the location and reconstructing the location can be explained by the fact that in most cases, appealing sites will be occupied by other companies. The time in between is thus needed to negotiate with the other party and to secure a buyout of the space. Using both London and Copenhagen as guidelines for this Gantt chart, it is likely that the reconstruction of the location will take about a year (L03).

Marketing

The company's marketing activities are characterized by PR outreaches (M01, M05, M06, M07), outdoor marketing (M03, M04) and the creation of a Dutch website (M08, M09). In order to create buzz about the Abercrombie & Fitch brand, it is important that the company keeps a close relationship with the press. The first outreach should therefore be sent out when looking for a location in the Netherlands (M01). This way, all rumours will be affirmed and people can get used to the idea of having an Abercrombie & Fitch store in the Netherlands by 2012. A second outreach can be sent out when the company has decided on the location (M02). Most marketing activities take place while the store is being reconstructed. First of all, a major screen including one of Bruce Weber's photographs will block the view of the potential store location (M03). Meanwhile, the brand can start looking for personnel (M07), and inform the people about the opening date of the store (M06). Three months before the opening of the store, Abercrombie & Fitch trams will catch the eye of inhabitants of Amsterdam and the company's website will be ready for launch (M04, M09).

Personnel

It is advisable to start looking for personnel while the location is being reconstructed. Top functions such as floor managers, should be hired first, so that they, in time, will be able to hire the Dutch brand ambassadors and models. Besides the reconstruction of the location, the opening of the store is also dependent on the training of personnel. Abercrombie & Fitch has developed and launched a comprehensive training curriculum that includes e-learning based programs focused on diversity awareness and skill building, as well as, an innovative and provocative approach to education that they call reality-based learning. It is important that all employees have attended the training and team-building activities before the opening of the store (Abercrombie & Fitch, 2010).

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14 Appendices

Appendix 1 Overview A&F Annual Report 2009

Financial Summary (2010)

FINANCIAL SUMMARY

The following summarized financial and statistical data compares Fiscal 2009 to Fiscal 2008 and Fiscal 2008 to Fiscal 2007:

	2009	2008	2007
Net sales by brand (thousands)	**$ 2,928,626**	**$ 3,484,058**	**$ 3,699,656**
Abercrombie & Fitch	$ 1,272,287	$ 1,531,480	$ 1,638,929
abercrombie kids	$ 343,164	$ 420,518	$ 471,045
Hollister	$ 1,287,241	$ 1,514,204	$ 1,589,452
Gilly Hicks**	$ 25,934	$ 17,856	$ 230
Increase (decrease) in net sales from prior year	**(16)%**	**(6)%**	**13%**
Abercrombie & Fitch	(17)%	(7)%	8%
abercrombie kids	(18)%	(11)%	16%
Hollister	(15)%	(5)%	17%
Gilly Hicks**	45%	NM	NM
Decrease in comparable store sales*	**(23)%**	**(13)%**	**(1)%**
Abercrombie & Fitch	(19)%	(8)%	0%
abercrombie kids	(23)%	(19)%	0%
Hollister	(27)%	(17)%	(2)%
Net retail sales increase attributable to new and remodeled stores, and websites	7%	7%	14%
Net retail sales per average store (thousands)	**$ 2,412**	**$ 3,041**	**$ 3,546**
Abercrombie & Fitch	$ 3,193	$ 3,878	$ 4,073
abercrombie kids	$ 1,453	$ 1,823	$ 2,230
Hollister	$ 2,299	$ 2,962	$ 3,550
Net retail sales per average gross square foot	**$ 339**	**$ 432**	**$ 503**
Abercrombie & Fitch	$ 359	$ 438	$ 463
abercrombie kids	$ 313	$ 397	$ 493
Hollister	$ 338	$ 442	$ 531
Change in transactions per average retail store	**(14)%**	**(16)%**	**(2)%**
Abercrombie & Fitch	(14)%	(11)%	(2)%
abercrombie	(14)%	(20)%	(2)%
Hollister	(16)%	(18)%	(4)%
Change in average retail transaction value	**(7)%**	**2%**	**1%**
Abercrombie & Fitch	(4)%	5%	5%
abercrombie	(7)%	1%	1%
Hollister	(8)%	1%	(1)%
Change in average units per retail transaction	**0%**	**0%**	**2%**
Abercrombie & Fitch	(2)%	0%	3%
abercrombie	(1)%	(2)%	2%
Hollister	0%	(1)%	2%
Change in average unit retail sold	**(7)%**	**2%**	**(1)%**
Abercrombie & Fitch	(2)%	5%	2%
abercrombie	(7)%	3%	0%
Hollister	(8)%	1%	(2)%

* A store is included in comparable store sales when it has been open as the same brand at least one year and its square footage has not been expanded or reduced by more than 20% within the past year.

** Net sales for the fifty-two week periods ended January 30, 2010, January 31, 2009 and February 2, 2008 reflect the activity of 16, 14 and three stores, respectively. In Fiscal 2007, all three stores opened in January 2008. Operational data was deemed immaterial for inclusion in the table above.

Source: Abercrombie & Fitch, 2010

Store count and gross square footage by brand (2010)

Store count and gross square footage by brand were as follows for the fifty-two weeks ended January 30, 2010 and January 31, 2009, respectively:

Store Activity	Abercrombie & Fitch	abercrombie kids	Hollister	Gilly Hicks	Total
January 31, 2009	356	212	515	14	1,097
New	2	5	14	2	23
Remodels/Conversions (net activity)	—	—	—	—	—
Closed	(12)	(8)	(4)		(24)
January 30, 2010	346	209	525	16	1,096
Gross Square Feet (thousands)					
January 31, 2009	3,164	976	3,474	146	7,760
New	49	40	152	15	256
Remodels/Conversions (net activity)	—	—	(2)	—	(2)
Closed	(103)	(37)	(27)	—	(167)
January 30, 2010	3,110	979	3,597	161	7,847
Average Store Size	8,988	4,684	6,851	10,063	7,160

Store Activity	Abercrombie & Fitch	abercrombie kids	Hollister	Gilly Hicks	Total
February 2, 2008	359	201	450	3	1,013
New	2	12	66	11	91
Remodels/Conversions (net activity)	2	1	—	—	3
Closed	(7)	(2)	(1)	—	(10)
January 31, 2009	356	212	515	14	1,097
Gross Square Feet (thousands)					
February 2, 2008	3,167	917	3,015	34	7,133
New	26	59	446	112	643
Remodels/Conversions (net activity)	28	7	19	—	54
Closed	(57)	(7)	(6)	—	(70)
January 31, 2009	3,164	976	3,474	146	7,760
Average Store Size	8,888	4,604	6,746	10,429	7,074

Source: Abercrombie & Fitch, 2010

Marketing, General and Administrative Expense as percentage of future sales

The following data represents the Company's Consolidated Statements of Operations for the last three fiscal years, expressed as a percentage of net sales:

	2009	2008	2007
NET SALES	100.0%	100.0%	100.0%
Cost of Goods Sold	35.7	33.1	32.7
GROSS PROFIT	64.3	66.9	67.3
Stores and Distribution Expense	48.7	41.2	36.3
Marketing, General and Administrative Expense	12.1	11.6	10.2
Other Operating Income, Net	(0.5)	(0.3)	(0.3)
OPERATING INCOME	4.0	14.3	21.1
Interest Income, Net	(0.1)	(0.3)	(0.5)
Income from Continuing Operations before Income Taxes	4.1	14.6	21.6
Income Tax Expense from Continuing Operations	1.4	5.8	8.1
Net Income from Continuing Operations	2.7	8.8	13.5
Net Loss from Discontinued Operations	(2.7)	(1.0)	(0.6)
NET INCOME	0.0%	7.8%	12.9%

Source: Abercrombie & Fitch, 2010

Net Sales by geographic area

Net Sales:

Net sales includes net merchandise sales through stores and direct-to-consumer operations, including shipping and handling revenue. Net sales are reported by geographic area based on the location of the customer.

	Fifty-Two Weeks Ended January 30, 2010	Fifty-Two Weeks Ended January 31, 2009
	(In thousands):	
United States	$ 2,566,118	$ 3,219,624
International	362,508	264,434
Total	$ 2,928,626	$ 3,484,058

Source: Abercrombie & Fitch, 2010

Appendix 2 Overview Popular Brands by gender

Source: Studenten.net

Appendix 3 Communication Policy

Seven steps to a well-established communication policy

Source: Brassington & Pettitt

Appendix 4 Examples Outdoor Advertising

Figure 13 – New York, 5th Avenue: billboards in times of reconstruction.

Figure 14 – London, Savile Row: Marketing campaign in London Transport.

Figure 15 – Los Angeles, Santa Monica Blvd.

Figure 16 – Amsterdam: artists impression of Amsterdam Public Transport advertising.

Appendix 5 Overview Social Media

Overview social media

Source: YME

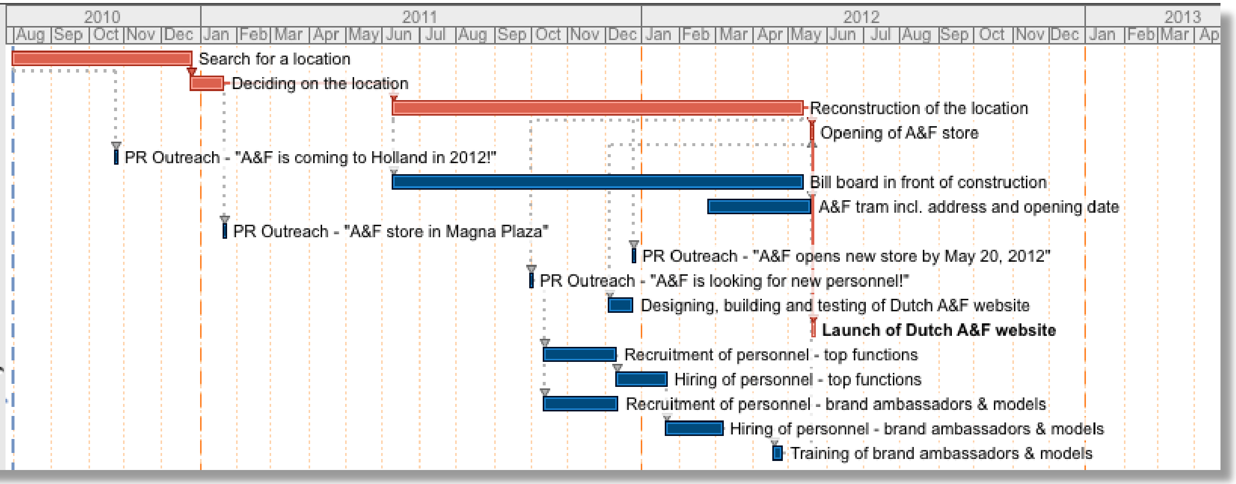
Acitivity in Netherlands	Dec 2008	Jul 2009	Growth	% of total NL
Uniques NL (x 1.000)	11812	12007	1,65%	100,00%
Hyves	**5783**	**7110**	**22,95%**	**59,22%**
Myspace	605	830	37,19%	6,91%
Facebook	794	1892	138,29%	15,76%
Netlog	493	487	-1,22%	4,06%
Schoolbank	449	477	6,24%	3,97%
Partyflock	682	1168	71,26%	9,73%
Pageviews NL (x 1.000.000)	31065	34757	11,88%	100,00%
Hyves	**3485**	**5717**	**64,05%**	**16,45%**
Myspace	12	16	33,33%	0,05%
Facebook	43	94	118,60%	0,27%
Netlog	198	54	-72,73%	0,16%
Schoolbank	8	8	0,00%	0,02%
Partyflock	128	196	53,13%	0,56%
Minutes NL	17244	18994	10,15%	100,00%
Hyves	**1347**	**1680**	**24,72%**	**8,84%**
Myspace	6	7	16,67%	0,04%
Facebook	18	48	166,67%	0,25%
Netlog	43	-		
Schoolbank	3	3	0,00%	0,02%
Partyflock	18	50	177,78%	0,26%
Pageviews/unique visitors	2630	2895	10,08%	
Hyves	**603**	**804**	**33,33%**	
Myspace	20	19	-5,00%	
Facebook	54	50	-7,41%	
Netlog	402	111	-72,39%	
Schoolbank	18	17	-5,56%	
Partyflock	188	168	-10,64%	
Minutes/unique visitor	1460	1582	8,36%	
Hyves	**233**	**236**	**1,29%**	
Myspace	10	8	-20,00%	
Facebook	23	25	8,70%	
Netlog	87	0	-100,00%	
Schoolbank	7	6	-14,29%	
Partyflock	26	43	65,38%	
Stickiness Leading social networks in their home country				
Pageviews/unique visitors				
Hyves		**804**		
Facebook (US)		306		
Myspace (US)		488		
Twitter (US)		35		
Minutes/unique visitors				
Hyves		**236**		
Facebook (US)		180		
Myspace (US)		240		
Twitter (US)		22		

Appendix 6 Examples Indoor Advertising

Interior of the A&F store

Appendix 7 Detail Planning (Gantt Chart)

ID	Description	Original Duration	Start
L01	Search for a location	105	08/02/10
L02	Deciding on the location	19	12/27/10
L03	Reconstruction of the location	241	06/10/11
L04	Opening of A&F store	1	05/21/12
M01	PR Outreach - "A&F is coming to Holland in 2012!"	1	10/25/10
M03	Bill board in front of construction	241	06/10/11
M04	A&F tram incl. address and opening date	60	02/27/12
M05	PR Outreach - "A&F store in Magna Plaza"	1	01/21/11
M06	PR Outreach - "A&F opens new store by May 20, 2012"	1	12/26/11
M07	PR Outreach - "A&F is looking for new personnel!"	1	10/03/11
M08	Designing, building and testing of Dutch A&F website	14	12/06/11
M09	Launch of Dutch A&F website	1	05/22/12
P01	Recruitment of personnel - top functions	42	10/13/11
P02	Hiring of personnel - top functions	30	12/12/11
P03	Recruitment of personnel - brand ambassadors & models	43	10/13/11
P04	Hiring of personnel - brand ambassadors & models	33	01/23/12
P05	Training of brand ambassadors & models	5	04/19/12



Appendix 8 Overview Expected Net Sales

	Distribution over weeks and peaks				Net Sales				Total Net Sales per Week	Total Net Sales per Quarter
Week	Per week	New Collection	Holiday	Back to School	Per week	New Collection	Holiday	Back to School		
20	100%				$133.558				$133.558	
21	100%				$133.558				$133.558	
22	100%				$133.558				$133.558	
23	100%				$133.558				$133.558	
24	100%				$133.558				$133.558	
25	100%		15%		$133.558		$20.034		$153.591	
26	100%		25%		$133.558		$33.389		$166.947	**$1.789.673**
27	100%		50%		$133.558		$66.779		$200.337	
28	100%		75%		$133.558		$100.168		$233.726	
29	100%		50%		$133.558		$66.779		$200.337	
30	100%		50%	25%	$133.558		$66.779	$33.389	$233.726	
31	100%		25%	50%	$133.558		$33.389	$66.779	$233.726	
32	100%		15%	75%	$133.558		$20.034	$100.168	$253.760	
33	100%		10%	25%	$133.558		$13.356	$33.389	$180.303	
34	100%			10%	$133.558			$13.356	$146.913	
35	100%	25%		5%	$133.558	$33.389		$6.678	$173.625	
36	100%	50%			$133.558	$66.779			$200.337	
37	100%	50%			$133.558	$66.779			$200.337	
38	100%	25%			$133.558	$33.389			$166.947	
39	100%	15%			$133.558	$20.034			$153.591	**$2.577.663**
40	100%	10%			$133.558	$13.356			$146.913	
41	100%	5%			$133.558	$6.678			$140.236	
42	100%				$133.558				$133.558	
43	100%				$133.558				$133.558	
44	100%				$133.558				$133.558	
45	100%				$133.558				$133.558	
46	100%				$133.558				$133.558	
47	100%				$133.558				$133.558	
48	100%				$133.558				$133.558	
49	100%		25%		$133.558		$33.389		$166.947	
50	100%		50%		$133.558		$66.779		$200.337	
51	100%		75%		$133.558		$100.168		$233.726	
52	100%		25%		$133.558		$33.389		$166.947	**$1.990.010**
1	100%				$133.558				$133.558	
2	100%				$133.558				$133.558	
3	100%				$133.558				$133.558	
4	100%	25%			$133.558	$33.389			$166.947	
5	100%	50%			$133.558	$66.779			$200.337	
6	100%	50%			$133.558	$66.779			$200.337	
7	100%	25%			$133.558	$33.389			$166.947	
8	100%	15%			$133.558	$20.034			$153.591	
9	100%	10%			$133.558	$13.356			$146.913	
10	100%	5%			$133.558	$6.678			$140.236	
11	100%				$133.558				$133.558	
12	100%				$133.558				$133.558	
13	100%				$133.558				$133.558	**$1.976.654**
14	100%				$133.558				$133.558	
15	100%				$133.558				$133.558	
16	100%				$133.558				$133.558	
17	100%				$133.558				$133.558	
18	100%				$133.558				$133.558	
19	100%				$133.558				$133.558	
		totaal in %		**6240%**		**totaal in $**		**$8.334.000**		

Appendix 9 Results of Questionnaire

Item - Question	Answer	Short answer
What is your gender?	Male	Male
	Female	Female
What is your age?	Younger than 18	<18
	Between 18 and 24	18-24
	Older than 24	>24
How much money a month do you normally spend on clothes?	Less than 50€	<50€
	Between 50€ and 100€	50-100€
	More than 100€	>100€
How much money are you willing to spend on a pair of jeans?	Less than 50€	<50€
	Between 50€ and 100€	50-100€
	More than 100€	>100€
Which of the following American brands would you like to see enter the Dutch market?	Abercrombie & Fitch	A&F
	Aeropostale	AeroP
	American Eagle	AE
	Banana Replublic	BR
	Forever 21	F21
	The Gap	Gap
	Hollister Co.	Hco.
	J. Crew	Jcrew
	Old Navy	ON
	Urban Outfitters	UO
	None	None

Before this survey, how ofted had you heard of Abercrombie & Fitch?	I hear about the brand frequently	frequently
	I've heard about the brand a few times	few times
	I've never heard about the brand	never
What are your general impressions about the Abercrombie & Fitch brand?	The brand seems to be of high quality and reliable	High quality and reliable
	The brand seems to be of average quality and dependability	Average quality and dependability
	The brand seems to be of low quality and dependability	Low quality and dependability
What price would you consider reasonable for a pair of jeans by Abercrombie & Fitch?	Less than 50€	<50€
	50€ to 74€	50-74€
	74€ to 99€	74-99€
	100€ to125€	100-125€
	More than 125€	>125€
Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Not at all	Not at all
	Not very interested	Not very interested
	Neither interested nor uninterested	Neither interested nor uninterested
	Somewhat interested	Somewhat interested
	Very interested	Very interested

Which of the following attributes do you associate with Abercrombie & Fitch?	Athletic	Athletic
	Luxurious	Luxurious
	Exclusive	Exclusive
	Preppy	Preppy
	Authentic	Authentic
	Quality	Quality
	Youthful	Youthful
	Funky	Funky

Resp	Gender	Age	How much money a month do you normally spend on clothes?	How much money are you willing to spend on a pair of jeans?	Which of the following American brands would you like to see enter the Dutch market?											Before this survey, how ofted had you heard of A&F?	What are your general impressions about the Abercrombie & Fitch brand?	What price would you consider reasonable for a pair of jeans by A&F?	Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Which of the following attributes do you associate with Abercrombie & Fitch?							
	Gender	Age	Monthly spendings	Sp.on Jeans	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO	None	Awareness	Impression	Price AF Jeans	Interests	Athletic	Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1559	Female	18-24	50-100€	50-100€	A&F						Hco.			UO		frequently	high quality and reliable	100-125€	Very Interested								
1562	Female	18-24	50-100€	50-100€	A&F						Hco.			UO		frequently	high quality and reliable	75-99€	Very Interested								
1564	Female	>24	>100€	>100€	A&F			BR		Gap						few times	high quality and reliable	100-125€	Very Interested								
1574	Female	<18	50-100€	<50€	A&F				F21		Hco.					frequently	high quality and reliable	50-74€	Very Interested			Exclusive			Quality		
1576	Female	18-24	>100€	50-100€	A&F			BR					ON			frequently	average quality and dependability	75-99€	Very Interested	Athletic						Youthful	
1578	Female	18-24	50-100€	>100€	A&F						Hco.					frequently	average quality and dependability	75-99€	Very Interested	Athletic						Youthful	
1580	Female	<18	50-100€	50-100€	A&F											frequently	average quality and dependability	75-99€	Somewhat Interested	Athletic			Preppy	Authentic			
1581	Female	<18	50-100€	50-100€	A&F		AE	BR	F21		Hco.		ON	UO		frequently	high quality and reliable	50-74€	Very Interested	Athletic			Preppy			Youthful	
1583	Female	18-24	<50€	<50€	A&F					Gap						frequently	high quality and reliable	50-74€	Somewhat Interested		Luxurious	Exclusive					
1585	Female	<18	50-100€	50-100€												never	average quality and dependability	50-74€	Not Very Interested					Authentic	Quality		
1587	Female	18-24	>100€	50-100€	A&F			BR		Gap						frequently	average quality and dependability		Somewhat Interested	Athletic						Youthful	
1588	Female	18-24	<50€	50-100€											None	never	average quality and dependability	50-74€	Not at all Interested							Youthful	Funky
1590	Female	18-24	<50€	50-100€	A&F			BR	F21							few times	average quality and dependability	50-74€	Somewhat Interested							Youthful	
1592	Female	18-24	50-100€	50-100€	A&F			BR								few times	average quality and dependability	75-99€	Neither Interested nor Uninterested	Athletic			Preppy				
1594	Female	18-24	50-100€	50-100€	A&F		AE	BR	F21	Gap						few times	average quality and dependability	50-74€	Very Interested					Authentic		Youthful	
1596	Female	18-24	<50€	50-100€	A&F		AE	BR	F21	Gap			ON	UO		frequently	high quality and reliable	75-99€	Somewhat Interested	Athletic			Preppy		Quality		
1598	Female	18-24	50-100€	<50€											None	never	average quality and dependability	75-99€	Not at all Interested							Youthful	Funky
1600	Female	18-24	<50€	<50€					F21					UO		few times	high quality and reliable	50-74€	Neither Interested nor Uninterested				Preppy		Quality		
1602	Female	18-24	<50€	50-100€	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO		never	average quality and dependability	75-99€	Somewhat Interested	Athletic					Quality		
1604	Female	18-24	50-100€	50-100€	A&F											few times	high quality and reliable	75-99€	Very Interested		Luxurious				Quality		
1606	Female	>24	>100€		A&F					Gap	Hco.		ON	UO		frequently	high quality and reliable	100-125€	Very Interested			Exclusive	Preppy				
1608	Female	18-24	<50€	<50€				BR	F21		Hco.					never	average quality and dependability	75-99€	Somewhat Interested	Athletic	Luxurious	Exclusive			Quality	Youthful	
1610	Female	18-24	<50€	<50€											None	few times	high quality and reliable	50-74€	Neither Interested nor Uninterested				Preppy		Quality		
1612	Female	18-24	>100€	>100€	A&F			BR								frequently	average quality and dependability	100-125€	Somewhat Interested							Youthful	Funky
1614	Female	>24	<50€	<50€					F21							few times	high quality and reliable	75-99€	Not at all Interested			Exclusive			Quality		
1616	Female	18-24	50-100€	50-100€	A&F			BR	F21	Gap						few times	average quality and dependability	50-74€	Somewhat Interested	Athletic			Preppy				
1618	Female	18-24	50-100€	>100€											None	never	average quality and dependability	75-99€	Neither Interested nor Uninterested					Authentic		Youthful	
1620	Male	18-24	>100€	50-100€										UO		few times	average quality and dependability	50-74€	Not at all Interested				Preppy				
1622	Female	18-24	>100€	50-100€				BR	F21					UO		frequently	average quality and dependability	50-74€	Very Interested	Athletic			Preppy	Authentic			
1624	Female	<18	50-100€	50-100€	A&F	AeroP					Hco.		ON			frequently	average quality and dependability	75-99€	Somewhat Interested					Authentic		Youthful	
1626	Female	18-24	>100€	50-100€	A&F			BR		Gap						few times	average quality and dependability	100-125€	Somewhat Interested	Athletic	Luxurious		Preppy		Quality		
1628	Male	18-24	>100€	50-100€	A&F						Hco.					frequently	high quality and reliable	100-125€	Very Interested		Luxurious	Exclusive					
1630	Female	18-24	<50€	50-100€											None	never	high quality and reliable	75-99€	Somewhat Interested			Exclusive				Youthful	
1632	Female	18-24	50-100€	<50€											None	few times	average quality and dependability	<50€	Somewhat Interested	Athletic						Youthful	
1634	Female	18-24	50-100€	50-100€				BR						UO		never	high quality and reliable	75-99€	Somewhat Interested							Youthful	Funky

Resp	Gender	Age	How much money a month do you normally spend on clothes?	How much money are you willing to spend on a pair of jeans?	Which of the following American brands would you like to see enter the Dutch market?											Before this survey, how ofted had you heard of A&F?	What are your general impressions about the Abercrombie & Fitch brand?	What price would you consider reasonable for a pair of jeans by A&F?	Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Which of the following attributes do you associate with Abercrombie & Fitch?							
	Gender	Age	Monthly spendings	Sp.on Jeans	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO	None	Awareness	Impression	Price AF Jeans	Interests	Athletic	Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1636	Female	18-24	<50€	<50€											None	never		<50€	Not at all Interested								
1638	Male	>24	>100€	>100€											None	frequently	average quality and dependability	100-125€	Not at all Interested				Preppy			Youthful	
1640	Female	18-24	<50€	<50€	A&F		AE	BR	F21		Hco.	Jcrew		UO		few times	average quality and dependability	<50€	Somewhat Interested					Authentic		Youthful	
1642	Female	18-24	<50€	<50€						Gap						never	high quality and reliable	50-74€	Neither Interested nor Uninterested			Exclusive					Funky
1644	Female	18-24	<50€	50-100€	A&F											never	average quality and dependability	50-74€	Neither Interested nor Uninterested			Exclusive				Youthful	
1646	Male	18-24	50-100€	50-100€											None	few times	high quality and reliable	100-125€	Not Very Interested		Luxurious		Preppy				
1648	Male	18-24	50-100€	>100€											None	never	high quality and reliable	100-125€	Somewhat Interested		Luxurious	Exclusive					
1650	Male	18-24	50-100€	50-100€	A&F											frequently	high quality and reliable	75-99€	Very Interested				Preppy	Authentic			
1652	Female	18-24	50-100€	50-100€											None	never	high quality and reliable	75-99€	Somewhat Interested						Quality	Youthful	
1654	Male	18-24	50-100€	>100€	A&F				F21							frequently	high quality and reliable	100-125€	Somewhat Interested				Preppy		Quality		
1656	Female	18-24	50-100€	<50€										UO		few times	high quality and reliable	75-99€	Somewhat Interested			Exclusive	Preppy				
1658	Female	18-24	50-100€	50-100€											None	few times	high quality and reliable	75-99€	Somewhat Interested	Athletic							Funky
1660	Female	18-24	<50€	<50€				BR					ON	UO		never	high quality and reliable	75-99€	Somewhat Interested	Athletic		Exclusive		Authentic	Quality		
1662	Female	18-24	<50€	50-100€											None	never	high quality and reliable	>125€	Not at all Interested			Exclusive				Youthful	
1664	Female	18-24	<50€	50-100€			AE	BR		Gap			ON			never	average quality and dependability	50-74€	Neither Interested nor Uninterested			Exclusive			Quality		
1666	Female	>24	<50€	50-100€	A&F			BR	F21	Gap	Hco.		ON			few times	high quality and reliable	75-99€	Very Interested				Preppy			Youthful	
1668	Female	18-24	<50€	<50€	A&F				F21							few times	average quality and dependability	<50€	Somewhat Interested						Quality	Youthful	
1670	Male	>24	>100€	50-100€											None	frequently	low quality and dependability	<50€	Not Very Interested								
1672	Female	18-24	50-100€	50-100€											None	never		50-74€	Neither Interested nor Uninterested	Athletic					Quality		
1674	Female	18-24	50-100€	<50€				BR								never			Neither Interested nor Uninterested								
1676	Male	18-24	50-100€	50-100€											None	never			Not at all Interested								
1678	Female	18-24	<50€	<50€					F21							frequently	high quality and reliable	50-74€	Not Very Interested						Quality	Youthful	
1680	Female	18-24	50-100€	50-100€	A&F									UO		few times	high quality and reliable	75-99€	Very Interested		Luxurious		Preppy		Quality	Youthful	
1682	Female	18-24	<50€	50-100€				BR	F21							never	high quality and reliable	50-74€	Not at all Interested	Athletic					Quality		
1684	Male	>24	50-100€	50-100€	A&F		AE			Gap	Hco.					frequently	high quality and reliable	50-74€	Somewhat Interested	Athletic			Preppy		Quality	Youthful	Funky
1686	Male	18-24	50-100€	50-100€	A&F											frequently	high quality and reliable	75-99€	Somewhat Interested						Quality	Youthful	
1688	Female	18-24	50-100€	50-100€	A&F			BR		Gap						few times	high quality and reliable	100-125€	Somewhat Interested			Exclusive	Preppy				
1690	Female	18-24	<50€	50-100€	A&F				F21		Hco.					frequently	average quality and dependability	50-74€	Very Interested			Exclusive				Youthful	
1692	Male	18-24	<50€	<50€											None	never	high quality and reliable	50-74€	Not Very Interested			Exclusive		Authentic			
1694	Female	18-24	50-100€	50-100€											None	never											
1696	Female	18-24	<50€	<50€											None	never		<50€	Neither Interested nor Uninterested								
1698	Male	18-24	50-100€	50-100€	A&F											never	high quality and reliable	75-99€	Somewhat Interested	Athletic		Exclusive			Quality	Youthful	
1700	Female	18-24	50-100€	50-100€	A&F		AE			Gap	Hco.	Jcrew	ON			frequently	high quality and reliable	75-99€	Somewhat Interested	Athletic	Luxurious		Preppy	Authentic	Quality		
1702	Female	18-24	50-100€	<50€	A&F					Gap				UO		few times	high quality and reliable	<50€	Somewhat Interested	Athletic				Authentic			
1704	Female	>24	>100€	>100€				BR								never	average quality and dependability	50-74€	Somewhat Interested	Athletic						Youthful	

Resp	Gender	Age	How much money a month do you normally spend on clothes?	How much money are you willing to spend on a pair of jeans?	Which of the following American brands would you like to see enter the Dutch market?											Before this survey, how ofted had you heard of A&F?	What are your general impressions about the Abercrombie & Fitch brand?	What price would you consider reasonable for a pair of jeans by A&F?	Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Which of the following attributes do you associate with Abercrombie & Fitch?							
	Gender	Age	Monthly spendings	Sp.on Jeans	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO	None	Awareness	Impression	Price AF Jeans	Interests	Athletic	Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1706	Male	18-24	50-100€	50-100€											None	never	average quality and dependability	<50€	Not at all Interested				Preppy				
1708	Female	18-24	<50€	<50€	A&F		AE		F21		Hco.					few times	high quality and reliable	<50€	Very Interested			Exclusive				Youthful	
1710	Female	>24	50-100€	50-100€	A&F	AeroP	AE			Gap	Hco.		ON			frequently	high quality and reliable	75-99€	Very Interested		Luxurious			Authentic			
1712	Female	18-24	50-100€	>100€	A&F			BR		Gap	Hco.					frequently	average quality and dependability	100-125€	Very Interested	Athletic			Preppy	Authentic	Quality	Youthful	
1714	Female	18-24	<50€	50-100€	A&F			BR	F21	Gap		Jcrew		UO		few times	average quality and dependability	75-99€	Somewhat Interested				Preppy				
1716	Female	18-24	50-100€	50-100€	A&F	AeroP	AE		F21		Hco.					frequently	high quality and reliable	75-99€	Very Interested		Luxurious		Preppy		Quality		
1720	Male	18-24	50-100€	<50€						Gap						never	average quality and dependability		Somewhat Interested	Athletic				Authentic			
1722	Male	18-24	50-100€	50-100€											None	never	average quality and dependability	50-74€	Neither Interested nor Uninterested			Exclusive			Quality		
1724	Female	18-24	<50€	50-100€											None	never			Not at all Interested								
1726	Female	18-24	<50€	50-100€	A&F					Gap				UO		few times	high quality and reliable	75-99€	Somewhat Interested	Athletic					Quality		
1728	Female	18-24	50-100€	50-100€											None	never		50-74€	Not Very Interested			Exclusive					Funky
1730	Female	18-24	50-100€	50-100€											None	never	average quality and dependability	<50€	Neither Interested nor Uninterested	Athletic						Youthful	
1732	Female	18-24	50-100€	50-100€	A&F			BR								few times	high quality and reliable	75-99€	Somewhat Interested	Athletic	Luxurious			Authentic	Quality		
1734	Female	18-24	<50€	50-100€	A&F						Hco.			UO		frequently	high quality and reliable	75-99€	Very Interested		Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1736	Male	18-24	50-100€	50-100€											None	never	average quality and dependability	50-74€	Not at all Interested	Athletic						Youthful	
1738	Male	18-24	>100€	>100€	A&F											few times	high quality and reliable	100-125€	Somewhat Interested		Luxurious		Preppy				
1740	Female	18-24	50-100€	50-100€				BR	F21	Gap						frequently	average quality and dependability	50-74€	Not Very Interested	Athletic				Authentic			
1742	Female	18-24	>100€	50-100€				BR	F21							never	average quality and dependability	50-74€	Somewhat Interested							Youthful	Funky
1743	Male	18-24	<50€	<50€											None	few times	average quality and dependability	50-74€	Not at all Interested	Athletic			Preppy				
1744	Female	18-24	50-100€	50-100€					F21	Gap						few times	high quality and reliable	75-99€	Neither Interested nor Uninterested			Exclusive			Quality		
1745	Female	18-24	<50€	50-100€	A&F					Gap						frequently	average quality and dependability	50-74€	Neither Interested nor Uninterested	Athletic						Youthful	
1746	Female	18-24	50-100€	50-100€	A&F		AE	BR	F21		Hco.			UO		frequently	average quality and dependability	50-74€	Neither Interested nor Uninterested				Preppy			Youthful	
1748	Male	>24	<50€	50-100€											None	never			Not Very Interested								
1750	Female	<18	>100€	50-100€	A&F		AE				Hco.			UO		frequently	high quality and reliable	75-99€	Very Interested				Preppy			Youthful	
1752	Female	18-24	50-100€	<50€											None	never		<50€	Neither Interested nor Uninterested								
1753	Female	18-24	>100€	50-100€	A&F		AE		F21	Gap						frequently	average quality and dependability	<50€	Somewhat Interested					Authentic	Quality		
1754	Female	18-24	>100€	50-100€					F21							few times	average quality and dependability	50-74€	Not at all Interested	Athletic							Funky
1755	Female	18-24	50-100€	50-100€											None	never	high quality and reliable	50-74€	Very Interested				Preppy			Youthful	
1756	Female	18-24	<50€	<50€											None	never											
1758	Female	18-24	<50€	50-100€											None	never	average quality and dependability	50-74€	Somewhat Interested							Youthful	Funky
1760	Female	18-24	50-100€	50-100€						Gap		Jcrew				few times	high quality and reliable	75-99€	Somewhat Interested				Preppy			Youthful	
1762	Female	18-24	<50€	<50€					F21	Gap						never		75-99€	Not at all Interested	Athletic							Funky
1763	Female	18-24	<50€	50-100€	A&F		AE	BR								frequently	high quality and reliable	75-99€	Very Interested	Athletic			Preppy				
1765	Female	18-24	<50€	50-100€					F21					UO		frequently	average quality and dependability	<50€	Not at all Interested				Preppy				
1766	Female	>24	<50€	50-100€				BR						UO		few times	high quality and reliable	75-99€	Not Very Interested	Athletic					Quality		

Resp	Gender	Age	How much money a month do you normally spend on clothes?	How much money are you willing to spend on a pair of jeans?	Which of the following American brands would you like to see enter the Dutch market?											Before this survey, how ofted had you heard of A&F?	What are your general impressions about the Abercrombie & Fitch brand?	What price would you consider reasonable for a pair of jeans by A&F?	Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Which of the following attributes do you associate with Abercrombie & Fitch?							
	Gender	Age	Monthly spendings	Sp.on Jeans	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO	None	Awareness	Impression	Price AF Jeans	Interests	Athletic	Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1768	Female	18-24	50-100€	50-100€	A&F	AeroP					Hco.					frequently	high quality and reliable	50-74€	Somewhat Interested	Athletic					Quality	Youthful	
1770	Female	18-24	<50€	<50€	A&F					Gap						few times	high quality and reliable	100-125€	Not Very Interested		Luxurious	Exclusive					
1771	Female	>24	>100€	>100€	A&F			BR								few times	average quality and dependability	75-99€	Somewhat Interested							Youthful	Funky
1772	Female	18-24	50-100€	<50€			AE		F21							never	average quality and dependability	<50€	Not Very Interested	Athletic						Youthful	
1774	Female	18-24	<50€	50-100€											None	never	average quality and dependability	100-125€	Somewhat Interested				Preppy			Youthful	Funky
1776	Female	18-24	<50€	50-100€											None	few times	average quality and dependability	50-74€	Not Very Interested			Exclusive					Funky
1778	Female	18-24	>100€	50-100€	A&F			BR		Gap						frequently	average quality and dependability	75-99€	Very Interested	Athletic			Preppy		Quality	Youthful	
1779	Female	18-24	50-100€	50-100€	A&F		AE	BR	F21					UO		frequently	high quality and reliable	75-99€	Very Interested			Exclusive				Youthful	
1780	Female	>24	50-100€	50-100€	A&F			BR		Gap						frequently		50-74€	Very Interested			Exclusive		Authentic			
1782	Male	18-24	50-100€	50-100€	A&F					Gap						few times	high quality and reliable	75-99€	Somewhat Interested	Athletic					Quality	Youthful	
1784	Female	18-24	<50€	50-100€					F21					UO		few times	average quality and dependability	<50€	Not Very Interested	Athletic			Preppy				
1788	Female	18-24	>100€	50-100€	A&F	AeroP	AE	BR	F21	Gap	Hco.		ON			frequently	average quality and dependability	75-99€	Very Interested	Athletic			Preppy			Youthful	
1790	Female	18-24	50-100€	>100€	A&F				F21		Hco.		ON	UO		frequently	high quality and reliable	100-125€	Very Interested			Exclusive	Preppy				
1792	Female	18-24	50-100€	>100€	A&F				F21					UO		frequently	average quality and dependability	75-99€	Somewhat Interested				Preppy		Quality	Youthful	
1794	Female	18-24	50-100€	50-100€	A&F				F21		Hco.			UO		frequently	average quality and dependability	50-74€	Somewhat Interested				Preppy				
1795	Female	18-24	50-100€	<50€				BR	F21							never	average quality and dependability	50-74€	Not Very Interested				Preppy	Authentic			
1796	Female	18-24	50-100€	50-100€	A&F			BR		Gap						few times	average quality and dependability	50-74€	Very Interested	Athletic			Preppy				
1800	Female	<18	50-100€	50-100€			AE	BR	F21							few times	high quality and reliable	100-125€	Somewhat Interested			Exclusive			Quality		
1802	Female	18-24	50-100€	50-100€	A&F			BR		Gap				UO		few times	high quality and reliable	50-74€	Somewhat Interested	Athletic					Quality	Youthful	
1804	Female	18-24	<50€	<50€											None	never	high quality and reliable	75-99€	Not Very Interested			Exclusive			Quality		
1805	Female	18-24	50-100€	50-100€				BR						UO		never	high quality and reliable	50-74€	Somewhat Interested		Luxurious						Funky
1806	Female	18-24	50-100€	>100€											None	never	average quality and dependability	50-74€	Somewhat Interested						Quality	Youthful	
1816	Female	18-24	>100€	50-100€					F21					UO		frequently	high quality and reliable	75-99€	Neither Interested nor Uninterested	Athletic			Preppy		Quality		
1818	Female	18-24	50-100€	>100€	A&F			BR	F21	Gap	Hco.			UO		frequently	high quality and reliable	>125€	Very Interested			Exclusive		Authentic			
1820	Male	<18	<50€	50-100€											None	never	average quality and dependability										
1824	Female	18-24	50-100€	>100€	A&F		AE	BR	F21		Hco.					frequently	high quality and reliable	100-125€	Very Interested				Preppy	Authentic			
1826	Female	>24	50-100€	50-100€	A&F					Gap						few times	average quality and dependability	50-74€	Very Interested				Preppy			Youthful	
1828	Male	18-24	>100€	50-100€											None	never	low quality and dependability	<50€	Not at all Interested	Athletic				Authentic			
1832		18-24	<50€	<50€											None	never	high quality and reliable	100-125€	Somewhat Interested			Exclusive					
1834	Female	18-24	<50€	50-100€						Gap					None	never		50-74€	Somewhat Interested			Exclusive			Quality		
1836	Female	18-24	50-100€	<50€											None	never	high quality and reliable	75-99€	Not Very Interested								Funky
1838	Female	18-24	50-100€	50-100€											None	never		50-74€	Not Very Interested								
1840	Female	>24	>100€	50-100€	A&F	AeroP		BR		Gap	Hco.			UO		frequently	average quality and dependability	50-74€	Somewhat Interested	Athletic			Preppy			Youthful	
1842	Female	18-24	50-100€	<50€											None	few times	high quality and reliable	<50€	Somewhat Interested	Athletic					Quality		
1851	Female	18-24	<50€	50-100€											None	never	high quality and reliable	<50€	Not at all Interested					Authentic			Funky

Resp	Gender	Age	How much money a month do you normally spend on clothes?	How much money are you willing to spend on a pair of jeans?	Which of the following American brands would you like to see enter the Dutch market?											Before this survey, how ofted had you heard of A&F?	What are your general impressions about the Abercrombie & Fitch brand?	What price would you consider reasonable for a pair of jeans by A&F?	Overall, how interested are you in visiting the Abercrombie & Fitch store if it were available?	Which of the following attributes do you associate with Abercrombie & Fitch?							
	Gender	Age	Monthly spendings	Sp.on Jeans	A&F	AeroP	AE	BR	F21	Gap	Hco.	Jcrew	ON	UO	None	Awareness	Impression	Price AF Jeans	Interests	Athletic	Luxurious	Exclusive	Preppy	Authentic	Quality	Youthful	Funky
1853	Female	18-24	>100€	50-100€	A&F			BR								few times	high quality and reliable	50-74€	Somewhat Interested						Quality	Youthful	
1855	Male	18-24	50-100€	<50€	A&F	AeroP	AE	BR				Jcrew				frequently	average quality and dependability	50-74€	Somewhat Interested				Preppy	Authentic			
1856	Female	18-24	<50€	50-100€							Hco.					few times			Somewhat Interested								
1857	Female	18-24	50-100€	50-100€				BR		Gap				UO		few times	high quality and reliable	75-99€	Not Very Interested			Exclusive	Preppy				
1859	Female	>24	<50€	50-100€											None	few times			Not Very Interested								
1864	Female	18-24	50-100€	50-100€											None	few times	average quality and dependability	50-74€	Somewhat Interested	Athletic						Youthful	
1866	Male	18-24	<50€	50-100€											None	never	average quality and dependability	50-74€	Neither Interested nor Uninterested		Luxurious			Authentic			
1868	Male	18-24	50-100€	<50€											None	never	low quality and dependability	<50€	Not at all Interested							Youthful	Funky
1879	Female	18-24	>100€	50-100€	A&F						Hco.		ON			few times	high quality and reliable	75-99€	Somewhat Interested						Quality	Youthful	
1888	Female	18-24	>100€	>100€											None	never		100-125€	Somewhat Interested	Athletic							Funky
1891	Male	>24	50-100€	50-100€				BR		Gap						few times	average quality and dependability	50-74€	Not Very Interested				Preppy	Authentic			
1912	Male	18-24	<50€	50-100€											None	never			Not at all Interested								
1913	Female	>24	>100€	50-100€						Gap				UO		never	average quality and dependability	50-74€	Neither Interested nor Uninterested			Exclusive					Funky
1921	Female	18-24	<50€	50-100€				BR						UO		frequently	high quality and reliable	100-125€	Somewhat Interested		Luxurious		Preppy				