

M.A. IN INTERNATIONAL BUSINESS COMMUNICATION -INTERCULTURAL MARKETING

MASTER'S THESIS

CULTURAL DISRUPTION OF AN INDUSTRY BY EXAMPLE OF THE GERMAN EROTIC INDUSTRY: A CASE STUDY OF

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Abstract

The German erotic industry in undergoing a disruption as consumer needs and behavior are becoming more postmodern and new players enter the market, thus as competition intensifies it becomes crucial for actors, and especially existing market incumbents, to stand out and position themselves relevant for postmodern consumers (Inglehart, 1997a; Möthe, 2015). Thus, a thorough understanding of the new dynamics of the market and its consumers is important for survival (Keller et al., 2012). Therefore, the aim of this thesis is to investigates the resulting changes in terms of competition and consumer behavior, and reveal relationships between different brand attributes and the brand choices made by consumers. Further, to gain general insight into the erotic industry and how long-existing market incumbents, such as Beate Uhse, are affected, as well as how the brand should respond to these activities and position itself accordingly in the market.

In the first part of the exploratory research, empirical results of an online questionnaire that was distributed in large German cities to a predefined target group, where 386 female participants responded, are presented. The thesis then utilizes the quantitative data and secondary data sources to verify or falsify hypotheses established based on the literature review conducted.

In conclusion, the results show that consumers hold postmodern values and emphasize the impact perceived brand positioning has on brand choices made within this industry. Further, a positive brand choice is statistically related to the attractiveness of distribution channels offered by that brand and a low degree of perceived masculinity of that brand. On the basis of the results of the research, the thesis recommends for the case study brand to launch a sub-brand that is not associated with the outdated perception consumers have of Beate Uhse.

The author points out the immense complexity of consumer behavior in relation to the topic of sexuality that is underlying the industry, thus this thesis, and recommends more in-depth qualitative studies to support this research.

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BU	Beate Uhse
В-2-В	Business to Business
В-2-С	Business to Consumer
М	million
€	Euro
EBITDA	Earnings before interest, taxes, depreciation & amortization
USP	Unique selling point
SWOT	Strength, Weaknesses, Opportunities & Threats
TV	television
i.e.	id est / that is
e.g.	exempli gratia / for example
IT	Information Technology
WVS	World Value Survey
SEO	Search-engine-optimization
Q.	Question

Definitions

(According to Hooley et al., 2012)

Industries:	Collection of organizations with technologies and products in common.
Markets:	Defined by customers, who are linked by a similar need.
Consumer:	The user of a product or service offering.
Customer:	The purchaser of a product or service offering.

Based on the assumption that for the product category in focus of this study the customer is at the same time the consumer, these two terms are used interchangeable throughout this paper.

Brand:	A name, design, term, symbol, or other feature distinguishing an organization
	or product from its rivals in the customer's eyes.
Organization:	An entity comprising multiple people that have a collective goal and are
	linked to an external environment.

Based on this research's focus on corporate brands, the terms 'brand' and 'organization' will be used interchangeable throughout this paper. Thus, mentioning of a brand refers to the umbrella brand of the respective corporate group.

1. Introduction

" The only constant is change." – Heraclitus

There are constantly changes in various aspects of our lives, most of which are likely to be triggered by external forces. If the impact of those forces is profound, it will have a changing effect on values and attitudes, and ultimately result in a change of behavior (Karahanna et al., 2005).

From a marketing and social sciences perspective, if such a change is impacting larger consumer groups, eventually entire markets, industries and societies might be affected, thereby, sometimes rather unexpectedly, disrupting current standards and norms of these entities.

Lately, the most common force behind such profound changes has been technology, more specifically; digitalization. This development is commonly summarized under the notion of 'digital disruption'. It has caused the bankruptcy of brands, such as Kodak or Blockbuster, which failed to adjust to the impact digitalization had on their industries and consumer groups, as well as caused the re-definition of industries due to new product offerings and substitutes, such as the case of Netflix in the video-on-demand industry or AirBnB in the hotel industry (Sax, 2016; BI Intelligence, 2017).

Albeit, nowadays the main focus of businesses when scanning their environment for disruption is placed on technological trends and innovations, also slowly developing changes in the values held by the members of a society constitute a serious and realistic cause of disruption that is often neglected and underestimated by businesses (Inglehart, 1997a).

Based on longitudinal studies, such as the World-Value-Survey (WVS) by Inglehart (WVS, 2016), which aims at deriving trends and patterns of national socio-cultural changes, many Western countries, such as Germany, have been found to undergo a shift from a society with modern toward a society with postmodern values (Inglehart, 1997b; WVS, 2016). The implications of such a major shift has been found to have a profound impact on almost all entities existing in that society, inter alia consumer behavior (Inglehart, 1997b, Karahanna et al., 2005).

Thus, it becomes crucial for businesses to scan the environment preventatively, as well as to analyze the true cause of a disruption to be able to realize the resulting possibilities, as disruption does not only bear threats, but also opportunities for both existing and new market players to create a relevant approach to the market with a product offering that convinces and satisfies those consumers, whose values have been undergoing a shift. Consequently, by means of monitoring changes in the society attentively, businesses can tap the full potential of the change, thus are able to position their brand truly unique and thereby gain a sustained competitive advantage (Peng, 2009). However, to neglect the impact of such a societal value shift could result in the same dilemma as neglecting disruption caused by digital and technological evolvements.

From the theoretical and experiential perspective above, it has been observed that an industry, where new market entrants have realized an opportunity based on such a cultural value-led change among most of the society, is the erotic industry in Germany.

Up until 2006 the erotic industry in Germany was mainly targeted toward men and their desires in Germany. In general, the industry had a somewhat disreputable and grubby image and the German society associated it with things that 'one just doesn't do', thus it was rarely talked about openly. However, new players that entered the market from 2006 on laid the foundation for a significant change in the entire erotic industry, by means of redesigning sextoys and offering a product portfolio aimed at women and couples, rather than men alone.

The foundation for this development can be traced back to culturally contingent effects evoked by a steady empowerment of women in general, both in private and professional life, resulting in the public dealing with sexuality and female desires in regard to sexuality to shift toward being more open and tolerating in Germany.

Ever since the famous TV-show "Sex and the City" began to be aired in 1999 in Germany, the topic of sexuality started to gradually become less and less of a taboo topic and it became publicly acknowledged that women are not necessarily (economically) dependent on a man, especially among its younger audience. While the plot of "Sex and the City" can be seen as a means of paving the way to a more open dealing with sexuality in general, the books (2011) and movies (2015) of "Fifty Shades of Grey" put once and for all an end to the taboo of publicly discussing, expressing and revealing desires and insights of one's own sexual life.

At the latest with Lena Dunham's series "Girls" aired in 2016, all secrets of young women's sexual lives from self-pleasure to rare fetishes were revealed and openly broadcasted on TV, empowering especially women to deal more naturally and openly with sexuality. Overall, the self-image and determination of women seems to have changed, as they feel now more comfortable to express desires and act upon them, while at the same time the social acceptance of such behavior seems to grow steadily.

This increased awareness of the topic among the society, has also been taken up by several future studies, such as the well-known "Future 100 Report" by JWT (J. Walter Thompson Paris, 2017), where the trend of sexual self-pleasure for women and the trend of sexuality converging with wellbeing constitutes two of the 100 future top trends for 2017 that businesses ought to be aware of.

Besides the increased attention that this topic has received in society and by marketers, the initial motivation for this thesis has then been triggered by the vast discussions and debates within the German society caused by the first-time-ever nation-wide erotic billboard advertisement displaying a vibrator and corresponding TV commercials in 2014. The new market players that had entered the erotic industry initiated these and thereby increased their brand awareness significantly (Dummer, 2015). At the same time, the industry's originator and longtime market incumbent Beate Uhse is steadily declining in terms of market share and all initiatives from its side to reach the newly emerged and un-saturated part of the market players are increasing their share of the market steadily, while Beate Uhse's annual turnover decreased from 284.8M \notin in 2005 to 110M \notin in 2016 (Statista, 2017).

Based on the challenges faced by Beate Uhse, it is interesting and relevant to investigate if and in what way Beate Uhse, as an existing market player, is able to respond and react to the culturally led disruption that is taking place in the erotic industry in Germany. Hence, how the brand will compete with the new market entrants and find its own way to turn the currently disadvantageous situation into an advantageous one, thus survive the change.

The overall problem statement for this thesis will be stated after the following overview of the German erotic industry, its players and trends.

1.1. Erotic industry in Germany: An overview

In the following, a general overview of the erotic industry in Germany will be provided, to ensure a better comprehension of the scope of this study.

The data available for this industry is incomplete and little, due to numerous retailers and distribution channels available, and no clear demarcations between product categories, according to the German "Federal association of erotic trade" (2015). Consequently, no detailed or complete overview can be presented.

It is worth noting that a distinction should be made between the *erotic* industry (mainly sex/love-toys and accessories, lingerie, body cosmetics), the *sex* industry (mainly adult entertainment, sex services, pornography) and the so-called *adult stores* or *adult paraphernalia* industry (referring to product offerings from both the sex and the erotic industry) (IBISWorld, 2016). The primary focal point of the overview outlined below is the *erotic* industry, however some brands in focus also offer products from the *sex* industry.

1.1.1. Market development and turnovers

Until the beginning of the new century, the erotic industry in Germany has been a rather unagitated industry that was dominated by two big players, namely Beate Uhse (BU) and Orion, as well as an abundance of small retailers. Due to a high moral entry barrier and other ethical concerns, no noteworthy new players entered the industry, which up until then was highly focused on the male part of the population (Hoffmann, 2016). However, the brand Eis.de, founded in 2006, changed the rules of the game by operating solely online and targeting primarily couples, thus considered female demands as much as male ones¹. Further, Eis.de, for the first time ever, launched TV commercials that were allowed to be aired before 10 pm on national German television, thereby broke the taboo of addressing sexuality and selfpleasure publicly.

In 2013, the brand Amorelie was found and followed the strategic direction of Eis.de, however it differed by targeting most and foremost women. Yet, both new market entrants changed the market by targeting consumer groups that had so far been overlooked by the

¹ It is acknowledged that couples can be both homosexual and heterosexual, but given the focus of this research and for reader-friendliness, couples are referred to as heterosexual.

existing players. Jointly, these two brands can be said to have re-invented the erotic industry, by approaching the respective market more as a lifestyle/wellness and self-fulfillment market instead of following the rather pornographic approach that the existing players Orion and BU had taken up until then (Möthe, 2015; Hoffmann, 2016).

Today, the four most know erotic brands in Germany are identified to be BU, Orion, Eis.de and Amorelie (Wirtschafts Woche, 2015). BU has once been market leader in respect to annual turnover, but with an annual turnover of more than 120 million (M) \in in 2016 and 7.7M customers in 2016, Eis.de is now considered market leader (Wirtschafts Woche, 2015; Hoffmann, 2016). A market follower that is quickly catching up is Amorelie, which accomplished to be among the four most well-know erotic brands in Germany just two years after its launch with an annual turn over of 20.6M \in in 2015. Orion holds the place of the eternal market follower with an annual turnover of 64.5M \in in 2015 (Wirtschafts Woche, 2015).



Figure 1: Annual turnover erotic industry: Overview 2015; in million € (Wirtschafts Woche, 2015)

1.1.2. Market trends

The purpose of this section is to provide an overview of the current trends in the market that have been observed. Given that the raison d'être of this thesis greatly stems from the observation of such a trend and the curiosity to investigate the impacts of it, it is evident that a constant scanning of the environment, including evolving trends is beneficial and necessary for a thorough overview of the industry.

1.1.2.1. Erotic as a lifestyle

As sex or love toys have lost the reputation of simply being 'naughty' and 'dirty' with a negative and pornographic connotation, they are becoming more socially accepted among the

German society. Companies that realized this trend have started to take it a step further and re-model the idea of the traditional 'Tupperware-party' by exchanging the Tupperware for dildos and vibrators, offering so-called 'dildo-parties'. This concept is working well among many female groups of various years of age and, especially for bachelorette parties, this has become a very popular activity (Möthe, 2015).

Besides entertainment, such parties also offer women the possibility to ask intimate questions and exchange experiences with friends and peers, thereby providing a platform for a more open and self active dialogue about sexuality, self-pleasure and other desires for women. Hence, supporting the overall evolvement that is taking place within the society of handling female sexuality and lust openly (Möthe, 2015). The popularity of such parties clearly shows that there is a demand for such platforms among women, which should be considered by current market players.

1.1.2.2. The green trend

Taking the widespread food trend of vegan nutrition a step further, several start-ups have started to offer vegan sex toys. In Germany, the pioneer of this trend is the erotic shop 'Other nature' offering solely sustainable and vegan sex accessories and toys. Originating from the trend described above, the founders concluded that only a strictly vegan product portfolio would accommodate with the high demands of their solely female target group (Girke, 2016). Up until now, this concept has been implemented by several start-ups, with product offerings ranging from vegan condoms that do not contain milk proteins, over dildos and vibrators without plasticizers, to whips made of recycled bicycle tubes (Girke, 2016).

While this trend is currently still rather small, given the overall change of consciousness within the German society toward a more green and sustainable lifestyle that will eventually affect various aspects and consumption choices of peoples' lives (German Council for Sustainable Development, 2017), existing players in the erotic market should keep an eye on this trend, to be able to fulfill the evolving demands of their customers.

1.1.2.3. Niche marketing

Another trend is the one of focusing one's product range on a specific sexual orientation or preference, thus niche marketing. Based on the growing societal acceptance toward openly expressing and committing to one's sexual desires, companies start to realize more and more that a niche focus on a certain sexual fetish or solely on homosexual sex toys and accessories is becoming lucrative as consumers prefer specialized stores in this product area (Möthe, 2015).

As a consequence, the existing players in the erotic market could be at risk of loosing a fragment of their current customers to such a niche supplier. Thus, a preventive counter strategy could be to focus on strengthening customer relationships and thereby tying potential niche customers to one's brand as a precautionary measure.

1.1.3. Market rivalry

Up until recently, the moral and ethical entry barrier into the erotic industry has been considered as rather high. This has for a long time prevented smaller local and niche players from tapping into the potential of this market. However, based on the trends outlined above and the increasing societal acceptance of an unconstraint way of dealing with sexuality, more players are expected to enter the industry in the future.

Currently, based on annual turnover and brand awareness, the main rivalry in the current German market of erotic products is taking place between Orion, Eis.de, Amorelie and BU (Wirtschafts Woche, 2015). For a better comprehension of the market dynamics, the three former brands will be introduced briefly in the following *table 1* to provide a comparative and reader-friendly overview. For a more detailed description of each brand, please see Appendix 1. Subsequent, BU will be introduced and quickly analyzed, as it is functioning as the case study in this study.

Brand	Founded in:	9	bevelopment in brief	E	acts	Distribution	Operating
						channels	countries
Orion	1981 in	•	Based on the outsourcing of the business units	•	Still family-owned	 Physical 	Germany,
	Flensburg -		publishing house and mail-order business	•	Online shop has been	stores	Switzerland
	named Orion		from the company Beate Uhse itself		awarded several times,	 Online shop 	, Austria,
	in 1985	•	Established 20 stores by 1987; 150 by 2013		but no longer after Eis.de	(desktop &	Denmark,
			within Germany alone (Orion, 2016)		launched its online shop	mobile	Sweden,
		•	Established its first B-2-C online store already		(Deutsches Institut für	version)	Norway and
			in 1995 – added B-2-B section in 2003		Service - Qualität, 2016)		Spain
		•	For the first time the radio was used as a	•	1000 employees (in		
			communication channel in 2015 (Orion, 2016)		2015) (Wirtschafts		
					Woche, 2015)		
Eis.de	2006 in	•	Reaches customers via an online store only		270 employees (in 2016)	 Online shop 	Germany
	Bielefeld	•	Playful and imaginative communication style		Product portfolio of	(desktop &	
		•	Focus: value for money		25.000 products (Geißler,	mobile	
		•	Grew its customer base from 1M (2007) to		2016)	version)	
						(month)	
			7.7M (2016) (Eis.de, 2017)	•	Hired well-known		
		•	Claims 50% of consumers to be younger than		German advertising		
			35 years (Eis.de, 2017)		agency 'Jung van Matt'		
					for its TV commercials		
Amorelie	2013 in	•	Claims mission to be to make sexuality be		71 employees (in 2016)	 Online shop 	Germany,
	Berlin		perceived as a completely normal element of		Most satisfied customers	(desktop &	Austria,
			everyone's life (Amorelie, 2016)		in the industry (Geißler,	mobile	Switzerland
		•	Focus: Premium quality (Hoffmann, 2016)		2016)	version)	, Belgium
		•	Targets primarily women from 25-54 years		Claims 70 % of its	 Time limited 	and France
		•	Founder sees business in lifestyle and beauty		customers to be female	pop-up stores	
			industry (Amorelie, 2010)		(Amorelie, 2016)	in big cities	

Table 1: Overview competitors of Beate Uhse; source: appendix 1

1.2. The case study: Beate Uhse

The brand Beate Uhse has been chosen to function as a case study for this research, because it was the first initial significant occupant to offer erotic products in Germany. Consequently, the disruption that is currently taking place in the erotic industry is assumed to have a profound affect on such a long existing player. Challenges faced, the developments and current strategies pursues by BU will be briefly discussed below, subsequent to a short company profile.

1.2.1. Company profile

BU had its beginnings in 1946 in Flensburg, Germany, when the German pilot and entrepreneur Beate Uhse-Rotermund sold pamphlets about contraception control to women. This 'Schrift X' (Paper X) was sold 32,000 times within one year (Gröhn, 2017).

In 1962, the company opened the world's first sex-shop in Flensburg, Germany, which expanded to 30 sex shops and 25 cinemas by 1992 (Glatzer, 1992). Besides its sex shops and cinemas, the company ran a well-established mail order business. In 1999, it got listed at the Frankfurter Stock Exchange.

Up until her death in the year 2001, Beate Uhse remained chairwomen of the company. Nowadays, the company's online shipping service operates in seven European countries under different brand names; 'Beate Uhse' is used in Germany and Austria, 'Pabo' in the Netherlands, Belgium, Czech Republic and Great Britain, and 'Adam & Eve' is used in France (Beate Uhse AG, 2017b). In addition to the B2C-divisions, BU also has a B2B wholesale business division, which caters for clients all over the world. The respective wholesale center is located in the Netherlands, functioning both for the own online shipping service and external B2B clients (Beate Uhse AG, 2017b).

The current director is Michael Specht, who is in office since April and successor to Nathal van Rijn, who left the company already after just three months in office (Kapalschinski, 2017).

1.2.2. Development and current strategy

Looking at the financial results, BU achieved the highest annual turnover in 2005 with 284.4M \in . However, by 2015 this amount has been reduced by more than half, namely to 128.8M \in . The forecasted annual turnover for 2016 is below 110M \in , while the loss made in 2016 has been estimated to be 18.4M \in (Beate Uhse AG, 2015), ergo constituting the company's weakest annual turnover yet. This is also reflected in the company's annual net profit, where only for 2010 a worse result was achieved, due to a flooding of the warehouse (*Figure 1*). It should be noted that the EBITDA rationale has deliberately not been chosen as a measure of analysis here, given widespread critique of it not truly reflecting on a company's financial health (Berman & Knight, 2009).



Figure 2: Annual net profit Beate Uhse AG (2004-2016) (Beate Uhse AG, 2015)

In addition, the company's equity decreased from $100M \in to 8.8M \in within six years (2009 - 2015)$ (Beate Uhse AG, 2015). With a decrease in equity and the company's value (17M \in in 2016) the company's shares were effected; now only worth 0,19 \in (according to DAX, 7th of July, 2017), compared to the all time high of 28,20 \in in 2001 (Beate Uhse AG, 2015). To keep profit losses at a medium rate, BU implemented several measures to lower the fixed costs and costs of sales, by, inter alia, lowering its amount of employees Europe-wide from 1523 in 2005 to 527 in 2015 and by closing down 16 of 78 stores in Germany (Beate Uhse, n.d.; Beate Uhse AG, 2015). The stores were closed according to whether the location fit the new brand image, thus if it was appealing to women (Beate Uhse AG, 2015).

In line with the company's latest efforts of re-directing its focus toward a more female target group, BU introduced a sub-brand called 'Mae B.' in 2004 (Ahne, 2004). This brand's purpose was to solely target female customers and the respective stores were designed to make women feel comfortable about entering the world of erotic products in a high quality and 'non-grubby' environment. Initially, four stores were opened with the plan of expanding all over Germany. However, after three profitless years, management was forced to shut down those four stores, conceding that the concept did not match female consumers' expectations (Ahne, 2004). In hindsight, management blamed the choice of location as the main factor for the failure as the stores were located in 'Karstadt'² branch stores (Ahne, 2004).

 $^{^{2}}$ Karstadt is one of the oldest and formerly largest department store chains in Germany. However, its image is to be old-fashioned and boring, thus mainly a population of 50+ is

As a consequence, BU withdrew from female-only stores and instead concentrated its efforts on premium stores primarily targeted toward women, while offering products for men also. Those BU flagship stores offering premium products, e.g. golden dildos, were opened in 2007 in prime locations in Berlin, Munich and Düsseldorf (Fründt, 2007).

Despite this change in strategy, the initial problem for BU remained, i.e. female customer remained to associate the image of 'grubby' red light milieu, sex cabins and dreary cinemas at railway stations with the brand (Fründt, 2007). As a measure of counteraction, from 2008 on, BU started to slowly shut down all their video cabinets in its German stores and in 2013 the logo of the brand was feminized with the objective to be more appealing to young female customers and to better resemble the brand's new image (*Image 1*) (Gröhn, 2017).



Image 1: Logos Beate Uhse (Beate Uhse AG, 2017a)

Moreover, big losses were suffered, due to the rather sudden elimination of the business made with sex movies, which were available for free and at a greater convenience on the Internet since the early 2010s. Given the continuous improvement of streaming providers and Internet connections in general, this sector is not expected to recover. Nonetheless, it was only in 2016 that BU decided to transfer the majority of its entertainment business³ to another corporation, yet, by that time the adjusted turnover of this business was as low as $0.4M \in (Beate Uhse AG, 2015)$.

In respect to the internal situation at BU, it is most likely that the constant change in management and the continuous re-focusing of strategic direction has posed numerous challenges, thus might be considered one of the main root causes of the current dilemma BU is facing. Another important factor might be the ongoing involvement of the former founding family, thus influencing the business course of action (Schwarzer, 2007). Currently, BU is facing severe financial problems, such as a bond of 30M \in to be paid back completely by 2019, in relation to which the CFO was let go in June 2017 (Kapalschinski, 2017; Beate Uhse, n.d.).

Based on the events and developments outlined above, it can be said that in respect to Porter's 'Five Forces' (1980) the threat of new market entrants, as well as the 'bargaining power of buyers' has increased throughout the years, consequently the 'rivalry among competing firms' has increased. The entrance of new market players had forced BU to re-position itself in the

shopping there. Several times the chain almost had to file for insolvency throughout the last years (Kolf, 2015).

³ This comprised telephone services, webcam shows, as well as video-on-demand-streamingservices (Beate Uhse , n.d.).

market, however, it appears that BU is not able to find a unique selling point (USP), thus it is currently positioned too broadly, thereby runs into the error of 'under-positioning' (Kotler et al., 2012). This is also reflected when briefly applying Porter's generic strategies (1985), as BU does neither seem to pursue a differentiation or a cost-leadership strategy, nor is a narrow target focus actually implemented. Thus, the brand might be what Porter calls 'stuck in the middle' (1985).

Due to this overall lack of clarity, while claiming to target females and couples (Beate Uhse AG, 2015), the brand appears unable to effectively segment the market it is operating in; hence BU fails to align its strategy to its target group and accordingly marketing and communication approaches, leaving the brand in deep water in respect to all four P's (Product, Price, Place, Promotion). Especially, in terms of 'Place', BU clearly missed to redirect its primary business efforts and focus toward e-commerce early on, e.g. the printing of BU's catalogue was only stopped in 2016 (Hoffmann, 2016). By the time current management realized this, competitors had passed already, forcing BU to invest heavily in a digital catch-up race, in order to be able to keep up to consumer demands. Today, BU claims to follow a 'cross-channel or omni-channel' strategy, comprising e-commerce, retailers and wholesale (Beate Uhse AG, 2015).

In general it is worth noting, that the transactions made under the umbrella of the Beate Uhse brand are highly intertwined and lack transparency. The business operations made internally in the group are complex, given the countless amount of small sub- and daughter companies that are operating under the Beate Uhse Corporation. It has been suggested that the constant shift of companies between the two board members Cok and van der Hooft is purely motivated by personal interests, thus one should remain wary of interpretations of such deals (Nicolai, 2013).

Recapitulating it can be said, that BU's management as the identified problem holder in this case, failed to provide structure and long-term strategic direction due to an unclear positioning and a resulting undistinguished brand perception by the consumer. Further, it is questionable to what extent the distribution channels, products and services offered fulfills nowadays consumer's expectations and demands. Overall, it can be argued that BU has so far been unable to communicate and epitomize its very own distinction between pornography and erotic amid the changing image of sexuality within the German society.

1.3. Aims of study

In view of the circumstances outlined above, the aim of this study is to create a holistic understanding of the developments and happenings in the erotic industry in Germany, with special focus on the impact that the culturally led disruption has had on this industry, as well as how new market entrants compete with existing incumbents in terms of brand positioning and, amid the rapid technological evolvement, the distribution channels offered. For this purpose the corporate brand BU has been selected as a case study example, given the challenges and threats faced by the brand as outlined above.

Consequently, this study will analyze the environment impacting the industry, and in particular BU, in regard to recent developments. Thus, the macro, meso and micro environment will be investigated to create a truly holistic analysis. Furthermore, the research conducted is focused on seeking to reveal the relationship between consumer's brand perceptions, values held, distribution channel offered and clarity of brand positioning and how those factors influence consumers' choice of brand. The ultimate objective of the study is then to be able to derive future marketing strategic actions for BU based on the analysis conducted.

1.4. Problem statement

With point of departure in the above, this study aspires to comprehend the cause of the changes that have disrupted the German erotic industry, as well as to investigate both the resulting transformation of the industry landscape, and the influence this development has on consumer behavior, and further, how a corporate brand such as Beate Uhse should react accordingly.

The overall problem statement of the study is as follows:

How should Beate Uhse position itself in the German erotic-industry in order to respond to changing consumer needs and (evolving) competitor activities?

1.4.1. Guiding research questions

Given the complexity of the topic with its various levels of analysis, the following three research questions have been established to guide the literature review and analysis for each level. Additionally, these questions provide an overview of the main topics the study aspires to address:

- *I. Macro* In what way has the socio-cultural development in the German society had an impact on the development of the erotic-industry and how have technological factors influenced that industry?
- *II. Meso* What are the key competitive drivers in the industry? How do the strategies pursued by the players in the market, in regard to segmentation, positioning and distribution channel respond to consumer needs?
- *III. Micro* How is the current brand perception of Beate Uhse related to the present failure of the brand to gain back market share in the German erotic industry?

1.5. Analytical framework

The structure of this study is visualized in the model below (*Figure 3*) and simultaneously functions as a structuring tool for the research method, which is explained in detail in *chapter 3*.



Figure 3: Own model – 'Research structure and analytical framework'

In line with the aims of this study, the scope entails an *introduction* into the subject matter leading to the overall problem statement of this study. The ensuing *literature review* begins with a rather broad focus on the macro environment of the erotic industry in Germany, followed by a narrower focus on the meso environment of BU and its main competitors,

Next, the choices made in regard to *methodology and research method* are elaborated on, thus laying the foundation for both, the scientific approach taken toward the entire study, and the primary and secondary data collection. Subsequent, the *analysis* will be carried out, structured in a way that guides the reader from the most narrow (micro) to the broadest focus (macro). Throughout the analysis the established hypotheses are to be verified or falsified, based on the statistical analysis of the quantitative dataset gathered. Findings of the secondary data sources will complement the statistical findings, allowing in-depth answering of the research questions in the *discussion* integrated into the analysis. This integration has been decided upon due the complexity of the research to ensure maintaining the focus on the outcome and prevent reiterations, as well as better comprehension by the reader. Then, the limitations of the research are mentioned and the overall problem statement will be answered in the *conclusion*, before elaborating on *future prospects* of the research.

2. Literature Review

The purpose of this chapter is to give rise to particular problems, issues and ideas that are addressed by the current research. Thus, the literature provided next will introduce the theoretical background necessary in order to establish accurate and valid hypotheses, which will then be tested by means of primary and secondary data research.

Given the rather intricate issue addressed by this study, the theory provided is broken down according to the three main levels that outline this study. Together, providing a comprehensive understanding of the various factors that are likely to have and have had an impact on the current topic. Hence, this chapter is forming the backbone that is essential for the entire study and its comprehensiveness. Due to the limited scope and space of this study, only theories and areas of research fields, which are highly relevant to the topic matter will be briefly discussed and introduced in this section. Nonetheless, the selected literature will aid the reader to gain a more holistic understanding of the subject area, by placing the research topic into a theoretical and conceptual context.

The chapter will start by addressing the theories relevant for the macro environment in this particular context. Subsequently, the focus will be placed on theories important for the meso level, thus within the market, and finally relevant topics for the micro level analysis will be addressed, referring to the consumer and individual brand level.

2.1. Theories for macro analysis

In order to gain a profound understanding of the various factors that influence the decisionmaking, the overall performance and the strategies pursued by an organization, an analysis of the macro environment is necessary. The factors examined throughout such an analysis are defined to be major external ones, which are therefore uncontrollable for the organization, e.g. natural forces (Keller et al., 2012).

For this purpose Francis Aguilar (1967, as cited in Kotler et al., 2012), developed the socalled 'PEEST' model which divides the macro environment up into five categories of forces, i.e. political, economic, ecological/physical, social/cultural and technological. Hereby, each factor is important by itself, yet, the interaction between them should also continuously be assessed (Kotler et al., 2012; Keller et al., 2012).

The 'SWOT' model with focus on the external happenings, namely opportunities and threats provides an alternate approach, however, while providing a good overview and indication of the overall business environment, the SWOT analysis tends to oversimplify the complexity of the issues an industry is facing (Hooley et al., 2012). Therefore, as this study's aspiration is to create a holistic and comprehensive understanding of the dilemma at hand, the more nuanced approach provided by the PEEST model is chosen.

Given the limitations and focus of this study, primary emphasis is placed on the *social/cultural* and *technological* factors of the PEEST model, which are assumed to have the greatest affect on the landscape the erotic industry operates in and its stakeholders. In the following, theories relevant to these two factors will be elaborated on further.

2.1.1. Socio-cultural factors

Edgar H. Schein (1985) first proposed that culture determines and limits strategy – an idea that soon turned into the maxim "Culture beats strategy" (Lloyd, 2000). Soon this dictum did not only turn out to be true in regard to organizational culture, but also for various other levels of culture that have an ultimate impact on an organization (Kotler et al., 2012). To date the literature on culture has evolved very narrowed foci on the various types of cultures that are present in the diverse aspects of business and society. The influence culture has on organizations and its stakeholders, has been increasingly recognized as an important factor, which can have a profound impact on one's competitiveness (Hooley et al., 2012; Keller et al., 2012).

The following review is based on the context of examining an industry's macro environment in a particular country; hence, deliberately no focus is placed on organizational or professional culture.

Up until now countless studies and theorists have tried to classify culture and divide nations by means of utilizing certain clusters or dimensions. At the same time literature has proposed numerous definitions of culture, yet none of them has become widely accepted in the field, as no measures or definition seem able to capture the whole complexity of this phenomenon (Hofstede, 2000; Fang, 2005; Inglehart, 2000; Lewis, 2000; Matthews, 2000; Trompenaars & Hampden-Turner, 2012).

In the attempt to classify culture on a national and cross-national level, Kluckhohn and Strodtbeck (1961), Hofstede (2000), as well as Hall (1976), for example, took the approach of establishing a set of value dimensions, arguing these can be applied to every society in the world. Thereby allowing measuring the different preferences each culture has. Nevertheless, while these dimensions that address, inter alia, attitude toward time, uncertainty and collectivism, serve as an overview, the main criticism of those theories is their reinforcement of a stereotyped view toward other cultures (Hsu et al., 2013). A critique the academic field echoed especially for the 'six-dimensional' model by Hofstede (2000).

Besides this bipolarization, a common flaw identified of those various theories, is the national division of cultures, i.e. using national boarders as distinguishing factors, which oversimplifies the complexity present within a nation's culture (Inglehart, 2000; Kragh, 2011). In support to this, Cleveland and Laroche (2007) reason looking at culture from this conventional perspective of using countries as the cultural unit of analysis to be increasingly ill-advised, given the rising level of multicultural diversity of countries nowadays. Even within relatively homogenous nations, individuals vary greatly in regard to the values held and practiced cultural norms (Cleveland & Laroche, 2007). Furthermore, Schneider and Barsoux (2003) argue that a general problem with theories solely based on Western research and established by Western theorists is a westernized bias in the data collected and the conclusions drawn from that.

Another point of critique regarding the theories above, according to Hsu et al. (2013), is the neglect of how culture changes, evolves and shifts over a given time period, hence the conclusions drawn from these theories are likely to be considered outdated and non-accurate for present research. The main elements that shape a culture, namely beliefs, values and norms of a society, are likely to change over time, which then in turn will, inter alia, define consumers' tastes and preferences (Kotler et al., 2012).

Both Schwartz (2012) and Inglehart (1997a; 1997b) considered this in the longitudinal studies, concerning the ongoing change that culture and thus one's values undergoes over time. However, while Schwartz argues "values are used to characterize groups and to trace change over time and to explain the motivational bases of attitudes and behavior" (Schwartz, 2012, p. 3), Inglehart (1997b) is taking into account the root cause for those changes, by considering both the Marxist and Weberian position, i.e. economic and cultural reasoning, for a change in a society's value system, and ultimately, behavior. The reasoning Inglehart (1997b) presents is that culture, economy and politics have equivalent power on the development of a society, where the power and importance of those factors may vary depending on the situation.

This more holistic approach taken by Inglehart (1997a; 1997b) for the *World Value Study* (WVS) and its cross-cultural variations map (Inglehart & Welzel), as opposed to the primarily individual and psychological focused *Values Studies* conducted by Schwartz (2000), is often favored for analyzing socio-cultural value changes on a macro level (Hsu et al., 2013).

The cross-cultural map functions as a cluster for analyzing patterns of social-cultural changes over time within a two dimensional system; survival vs. self-expression values and traditional vs. secular-rational values. Urban areas have hereby been identified as the ones to first experience a shift in values, due to the increased amount of younger residents and the increased wealth as opposed to rural areas (Inglehart R., 1997b). However, to date literature criticizes that Inglehart neglects the impact of technology, which is considered a fundamental part of most modern and postmodern cultures today (Kotler et al., 2012).

In general, Fang (2005) proposes that the notion of culture, influenced by factors that are both external and internal to an individual, as well as a society, must therefore be accompany by the understanding that culture is a mere identification of values and behaviors in a given context at a given time. Further, while Mathews (2000) sees culture as a gatekeeper to one's choices, Fang (2005) emphasizes that these choices do not represent the totality or the entire life process of that culture, as it is ever changing. Consequently, a constant scan of the socio-cultural change undergoing the landscape and (potential) consumer groups relevant to one's industry and business is crucial for sustained competitiveness, and thus success.

2.1.2. Technological factors

Kotler et al. (2012) argue, "every new technology is a force for 'creative destruction'" (p. 190) that has had an impact on organizations and entire industries at all times. However, after the emergence of the Internet, Hooley et al. (2012) emphasize that the pace of innovations is accelerating with a steady decrease in time between the appearing of new ideas and their successful implementation. Information Technology (IT) is considered the main driver of change in this context and in regard to consumer behavior and businesses, this development has led to a very high degree of digitalization, e.g. the emergence of global citizens due to the dissolving of national boarders and timely or geographic constraints. Thus, allowing consumers to have greater access to information than ever before (Kotler et al., 2012; Michael & Miller, 2013).

Further, the literature to date covers various concepts and developments that emerged from IT and the current global information age, highly relevant for any industry and the marketing activities of individual organizations, e.g. 'Big Data', 'Crowdsourcing', the 'Internet of Things' and dynamic pricing, as well as algorithms and the resulting possibility of search-engine-optimization (SEO) (Chui et al., 2010; Koufaris, 2002; Michael & Miller, 2013). It should be noted that these sources are mainly skewed toward the impact on consumer behavior, management decisions and business strategies, rather than B-2-B literature.

Within the consumer behavior field, IT has an significant effect due to the increased use of mobile devices, allowing the generation of near-real-time data about purchasing trends that reveal detailed insights about the complex decision-making process performed by consumers (Michael & Miller, 2013). The digital footprints left behind by consumers are believed to bridge the gap between intended and actual behavior by shedding light on, up until recently, hidden behavioral patterns (Michael & Miller, 2013; Ajzen, 1991). Yet, ethical concerns about the use of the generated data remain a major challenge for organizations, as they need to gain consumers' trust while the boarder between public and private space continues to blur (Gherab-Martin, 2010).

Despite this trend, Koufaris (2002) highlights the necessity to distinguish between online and offline consumers, as the online consumer must also be considered as a computer/mobile device user. Beyond that, online consumers have been found to be less loyal (Morrisette et al., (1999) as cited in Koufaris, 2002) and shop in an different social environment than offline consumers (Solomon et al., 2010), as for example, the increased privacy of online shopping is *"enabling consumers to indulge in impulsive shopping behavior they would find embarrassing offline"* (Koufaris, 2002, p. 210).

A number of authors further emphasize a shift in the locus of power happening in various industries due to increased online shopping, resulting in a consumer behavior described as powerful, demanding and utilitarian – the keyword being 'prosumers' (Novak et al., 2000; Koufaris, 2002; Solomon et al., 2010). In addition, Heijden et al. (2001) reason that new obstacles have emerged because of this for marketers and vendors of web-based stores, as the perceived risk of online shopping and ease of use of the website has been found to drastically influence the attitude toward online purchasing. Reducing the encounter of the online consumer with negative challenges, such as difficult navigation and low perceived data security, is considered crucial for diminishing computer usage anxiety, especially among generations that are not considered digital natives (Koufaris, 2002).

Thus, taking a brand's and retailer's perspective, the complexity of their task to offer a satisfying consumer experience at various levels has increased, demanding innovative communication and distribution systems, as the online consumer experience becomes paramount (Novak et al., 2000). Simultaneously, literature to date identifies the chance to precisely target individual consumer's exposure to relevant marketing activities and disclosure of information. Hence, retailers are able to have a more direct influence on the online shopping behavior and to consciously engage in the consumer's decision-making process (Koufaris, 2002; Solomon et al., 2010).

In conclusion it should be emphasized that the impact and importance of technological and socio-cultural factors and their constant development at a macro level deserve careful attention by brands and retailers, in order to meet consumers' demands and to stay up to date with one's strategy. Moreover, the impact of these factors is considered profound, thus should be kept in mind throughout the following elaborations on the two remaining levels of the analysis.

2.1.3. Hypotheses derived from macro level theories

Based on the theories reviewed above concerning socio-cultural and technological factors, the following hypotheses have been derived that are to be verified or falsified in the analysis.

H₁: Members of the established target group that show interest in the erotic industry are likely to hold postmodern values.

H₂: There is a positive relationship between the degree of low risk perceived and the distribution channel preferred by consumers.

2.2. Theories for meso analysis

Moving on to the next level of the analysis, theories and literature relevant for the meso environment of the industry and the respective research question will be reviewed. Thus, no exhaustive review of the different market forces for this level will be provided. Yet, after a brief review of the industry forces, competitive forces, segmentation and positioning, as well as distribution strategies will be covered.

2.2.1. Industry forces

With the introduction of the 'Five Forces' model, Michael H. Porter (1980) was the first to develop a holistic tool for a competitive analysis of an industry by providing a structured model aiding at understanding the status quo of an industry. While in the literature to date numerous criticisms toward the model arose (Hooley et al., 2012; Mintzberg et al., 2009), the division of the different market forces into five distinct forces is still acknowledged as a valuable starting point for various analyses (Keller et al., 2012). However, Kotler et al. (2012) caution that a too narrow focus on those five forces carries the risk of overlooking important additional elements emerging within the industry or at its macro level.

While each force is dedicated to a particular element of the meso level analysis, given the overall problem statement and the limited amount of space, the following review will be primarily focused on the force of '*rivalry among competing firms*', which is influenced by the remaining four forces, i.e. 'threat of new market entry', 'bargaining powers of suppliers', 'bargaining power of buyers', and 'threat of substitutes' (Porter, 1980).

2.2.2. Competitive forces – segmentation and positioning

The literature addressing, by extension, the 'force of rivalry', comprises three main areas that are intertwined, i.e. *competitive strategies, positioning* and *segmentation* (Kotler et al., 2012).

From the *competitive strategies* field, the 'Generic Strategies' developed by Porter (1985) provide a general overview of different strategies pursued by market players in terms of differentiation and cost leadership, based on the strength and impact identified for each of the 'Five Forces' (Porter, 1980). Yet, Mintzberg et al. (2009) criticize these 'Generic Strategies' to "*cause inflexibility and narrow an organization's vision*" (p. 107).

A similar idea, but with a different focus, was developed in 1965 by Igor Ansoff, namely the 'Ansoff matrix', which bases the analysis of strategy on the type of market and product, providing managers with four possible routes (Hooley et al., 2012; Ansoff, 1965). However, while being praised for its ease of use and simplistic overview, the flaw of this tool is its neglect of external factors, such as risk management and the resources available to an

organization (Kotler et al., 2012). Despite their limitations, these tools are considered the best starting point available, as no similar holistic alternatives exist.

Reviewing the literature to date for *competitive positioning*, it was Smith (1956), who first introduced the idea of market *segmentation* as an alternative to product differentiation (McDonald & Dunbar, 2012). Ever since, this notion has occupied numerous researchers as to what segmentation strategies and bases to use. Widely popular in the field's literature is Kotler's (1984) three-step-approach, following the sequence of segmentation, targeting and positioning (STP) (Dibb, 1998). Respectively, the literature acknowledges consumer market segmentation to be the necessary underlying step for strategic positioning of a brand in any market landscape (McDonald & Dunbar, 2012; Piercy & Morgan, 1993). Yet, the approaches taken toward it have changed over time; many older segmentation theories were primarily focused on the 'locatability' of behavior segments. However, due to the emergence of the Internet and online stores, the location of the consumer and competitor becomes largely irrelevant, provided that no shipping and language barrier exist (Johar & Sirgy, 1989; Bailey et al., 2009; Fuat Firat & Shultz II, 1997).

Hence, the following focus is placed on more recent approaches to segmentation and positioning. Further, although Piercy and Morgan (1993) and Kotler et al. (2012) argue segmentation should meet both, internal, i.e. organizational structural driven, and external, i.e. customer and market driven, needs, given the delimitations of this study, emphasis is placed primarily on *external need-based* segmentation. Especially postmodern consumers are forcing businesses to drive their internal businesses from the demand- rather than the supply side (McDonald & Dunbar, 2012).

In the literature to date, the most common segmentation schools utilized by marketers to define a homogenous group of customers to target and position for accordingly, are the demographic, socio-economic and psychographic/benefit school (Solomon et al., 2010). Various theorists advise to use a two- or three-dimensional approach comprising the different schools to gain a more in-depth understanding (McDonald & Dunbar, 2012; Kotler et al., 2012; Piercy & Morgan, 1993). Nevertheless, especially the three-dimensional approach is difficult to implement in reality, due to its overwhelming complexity and the need to conduct a constant scanning of the macro-environment (Mintzberg et al., 2009).

Abell (1980) proposes a different concept with his three-dimensional model focused on consumer needs, technology and consumer demands. However, its strict marketing emphasis hampers the model to be applied for broader business strategies beyond pure marketing, as it leaves no room for consideration of external factors (Kotler et al., 2012).

In general, McDonald and Dunbar (2012) highlight that in the end customers will always segment themselves, as they do not slot themselves into predefined categories considered homogeneous by marketers. A threat lies in targeting groups that are perceived as homogenous based on macro-level characteristics, but actually are heterogeneous due to different attitudinal and behavioral characteristics (Wind & Bell, 2008; Peltier & Schribrowsky, 1997). The objective should be to target a natural homogenous group based on shared characteristics that are truly relevant for the specific market a company is in, as

"segmentation is the firm's response to a fundamental market feature – heterogeneity" (Wind & Bell, 2008, p. 223).

In addition, McDonald and Dunbar (2012) identify the greatest challenge for a brand to be to find the 'right' definition of the market for the particular situation a potential consumer is in, as nowadays postmodern consumers are adapting fast and should no longer be treated as single-habitual persons. Recent literature also considers technological advances as an important factor, as physical barriers are broken down, leading to consumers being able to create an almost 'perfect market' for themselves by sourcing alternative offers available (Wind & Bell, 2008; Fuat Firat & Shultz II, 1997). Thus, traditional bases of segmentation, such as demographics and geographies, are not considered sufficient enough anymore, nor should be seen as boundaries.

A recent reaction to the criticism toward segmentation being too static and deterministic due to its narrow focus (Piercy & Morgan, 1993; Wind & Bell, 2008), is the morphologically motivated approach of the so-called 'Verfassungsmarketing' (roughly: psychological states of mind marketing) (Rheingold Institute, 2015a). The notion here is that nowadays' multi-faceted and ever-changing consumers cannot anymore be systematically described through social demographic attributes and social affiliations. Instead consumers that are in the same psychic states form a homogenous group that considers the same product at the given time (Rheingold Institute, 2015a). Thus, it is argued that to understand one's target groups, one should examine these states of psychological 'verfassung', as consumer behavior is determined by impact-units formed by interplays of psyche and product (Frank & Riedl, 2004). Given the changes and growing complexity of societies, this approach comprises a detailed psychological analysis allowing for an understanding of the complex effects and impacts that accompany such changes. This provides then the possibility to understand contradictory phenomena in its deeper meaning, thus segment consumers and ultimately, position the product or service offered more effectively (Rheingold Institute, 2015b).

Following the consecutive steps of Kotler's STP-model (1984), McDonald and Dunbar (2012) argue for it to be crucial to measure the concluded segment's attractiveness and potential by means of evaluating the company's competitiveness in the particular market in the specific segment. Essential characteristics of the segment to consider are defined to be its measurability, substantiality, accessibility and actionability (Wind & Bell, 2008). Yet, brands should be aware that different segments require different strategies and marketing approaches (Reutterer et al., 2006). Further, theorists warn against the error of 'under-positioning', i.e. a too broad positioning resulting in the consumer not being able to truly differentiate between various brands existent in the market (Kotler et al., 2012).

In recapitulation, it can be said that relevant positioning is crucial for success, as it provides the foundation for the remaining marketing strategy and processes, as well as resource allocation decisions and other activities for the firm. Consequently, close attention should be paid to the 'response to segmentation', thus guidelines for the development of products and services and its associated positioning to meet the evolving needs of the target segment identified (Wind & Bell, 2008).

2.2.3. Distribution

In view of the profound impact that technology is acknowledged to have on the overall industry landscape, the aspect of distribution channel strategies will be reviewed further as it constitutes the next consecutive step in a company's go-to-market strategy, based on the competitive positioning and the overall brand mission (Kotler et al., 2012). There are multiple options of distribution channels, i.e. the way to reach the market, and the focus of one's distribution channel should always be placed on the end-users' needs, thus customers (Verhoef et al., 2015). Consequently, Verhoef et al. (2015) argue a constant evaluation of how one's end-users prefer to purchase products and emerging trends, such as increased mobile purchasing, to be crucial for success.

Already in 2003, Esper et al. recognized that location is no longer of paramount importance in retailing, due to the emergence of the Internet and the online-based retailing relating thereto. While both challenges and opportunities arose hereof, transportation and delivery issues are identified as key components of online customer satisfaction by various authors (Esper et al., 2003; Piotrowicz & Cuthbertson, 2014). Accordingly, in the literature to date special attention has been paid to the so-called 'last mile', referring to the link between the customer-based Internet ordering and the delivery of the product to the customer, as online shoppers rate the level of on-time delivery and secured privacy as decisive for making an online purchase (Yankelovich, (2000) as cited in Esper et al., 2003). Further, Tan and Thoen (2000) argue trust to be the basis on which customer make Internet buying decisions, thus maintaining satisfied customers becomes paramount for online retailers.

Besides the focus on delivery, literature has also considered the integration of distribution channel strategies. Special focus has been placed on the *multi-channel* approach and, the recently evolved, *omni- or cross-channel* approach (Verhoef et al., 2015). It should be noted that for the following review, a brand/retailer perspective has been taken, rather than a narrow customer relationship management one.

Emerging from the advent of the online channel and the ongoing digitalization, the *multi-channel approach* was initially developed by adding new channels to one's existent mix of channels (Verhoef et al., 2015). However, the different channels are kept separate with no overlap (Goersch, 2002). Further, the channel scope is limited to physical stores, online stores and direct marketing, i.e. catalogue, while the channel focus is solely placed on interactive channels that provide two-way communication, thus customer contact points (Agatz et al., 2007; Verhoef et al., 2015).

Goersch (2002) argues for the integration of channels to be key, as providing a seamless and consistent customer experience across all channels becomes a competitive advantage by giving online shoppers the incentive to stay with the same retailer when switching channels. The literature to date recognizes that offering multiple complementary channels allows for a deeper and greater mix of customer service, thus enhancing the retailer's or brand's value proposition, while noting that channel preferences vary between customers and situations (Agatz et al., 2007). Yet, cannibalization and conflicts between the different channels pose risks within this approach (Webb, (2002) as cited in Agatz et al. (2007).

The recent advent of mobile channels yielded the *omni/cross-channel approach*, which involves more channels than the multi-channel approach and, most importantly, acknowledges that natural boarders between channels begin to blur and eventually disappear completely (Rigby, 2011).

Verhoef et al. (2015) emphasizes the importance of the concept of 'showrooming', i.e. shoppers search for information in store, while simultaneously search for better offers and information on their mobile devices, and vice versa; and 'webrooming', i.e. shoppers seek information online, but then buy offline. Thereby, the distinction between interactive two-way communication and one-way communication channels becomes less apparent (Piotrowicz & Cuthbertson , 2014). Thus, in contrast to the multi-channel approach here *"the different channels and touch points are used constantly, interchangeably, and simultaneously by both customers and firms"* (Verhoef et al., 2015, p. 176). Hence, channels and their performance must be synergized to facilitate an optimized customer experience, while it should be considered that particular touch points have a greater impact on brand preference than others (Verhoef et al., 2015).

To conclude, depending on the product and end-user preferences evaluated, the right distribution channel strategy should be implemented by a brand/retailer, whilst notwithstanding the above; the safeguarding of customer satisfaction across all channels and services offered is of paramount importance.

2.2.4. Hypotheses derived from meso level theories

Based on the theories reviewed above concerning market forces, the following hypotheses have been derived that are to be verified or falsified in the analysis.

H₃: There is a positive relationship between the choice of brand and the consumer's perceived attractiveness of the distribution channels offered by that brand.

H₄: There is a positive relationship between the choice of brand and the consumer's perceived clarity of positioning of that brand.

2.3. Theories for micro analysis

The theories presented next are selected based on the guiding research question of the microlevel of the industry, thus the individual brand and consumer level.

2.3.1. Consumer behavior and culture

It should be noted that in order to provide a review as relevant as possible based on the context of this research, the following review is primarily focused on women as a consumer group, further, the literature presented was chosen in view of its applicability to the erotic industry.

The reasons behind this are, first of all, based on the recent developments in regard to advanced technology and the related possibilities. Consequently, the power held by consumers is growing, caused, inter alia, by greater knowledge about a product or service and the option to instantly compare product offerings online (Porter, 1980; Koufaris, 2002). At the same time the environmental and ethical concerns among consumers is growing, thus forcing companies to be highly transparent and trustworthy in respect to their actual products, thereby accelerating the increase of the power held by consumer (Keller et al., 2012; Inglehart & Baker, 2000; Hooley et al., 2012).

Second of all, and in regard to a more individual consumer level, the literature to date argues that in Western countries, such as Germany, the motivation for purchasing a product or service has moved beyond the first two levels of Maslow's 'Hierarchy of needs' (1954), i.e. physiological, biological and safety needs. Instead, people now aspire to fulfill higher order needs, such as belongingness, love, esteem, and ultimately self-actualization (Kim et al., 2002; Solomon et al., 2010).

This can be linked back to the theory established by Inglehart (1997a; 1997b), as introduced at the macro level, in the way that such an aspiration of meeting higher-order needs constitutes an representative indicator for the evolvement of a society from modernism toward postmodernism. Further, evoked by democracy being the characteristically political system in a postmodern society, its member value equality as a vital point. Thus, individual freedom is emphasized, thereby enabling and motivating especially women to strive for higher (self)-esteem and self-actualization, which results in a change of their consumer behavior (Inglehart, 1997a; Kim et al., 2002; Solomon et al., 2010). Consequently, when deciding to purchase an erotic product, female consumers are very likely to be motivated by these higher-order needs, thus choosing the brand that is perceived as most relevant to them in that respect.

Karahanna et al. (2005) have further investigated this impact of culture on consumer behavior, thereby linking macro level theories to the level of the individual consumer and have illustrated this path of dependency in their model of '*Culture's Influence on Behaviour'* (Appendix 2). According to the model, one's subjective culture and personality traits can be described as the foundation of all aspects of one's behavior. While Karahanna et al. (2005) further argue that also beliefs and attitudes have an influence, the study acknowledges that values have a particular high impact on one's individual behavior.

A similar argument is made by Creusen and Schoormans (2005), who summarize one's subjective cultural values under the umbrella of 'personality', which will eventually lead to an individual typical pattern of behavior. However, Creusen and Schoormans (2005) counterargue that attitudes are of high impact and the indicator of behavior, as attitudes mirror one's 'personality', thus also personal preferences and inclination toward a particular brand or product. Nonetheless, the focus of this research remains values rather than attitudes per se.

2.3.2. Consumption and brand perception

Diving deeper into the research area of consumption in regard to consumer behavior, the literature suggests that given the variety of choices available even for products and services that fulfill higher-order needs, a consumer's decision to purchase from a particular brand is greatly tied to the consumer's own values, the consumer's involvement in the product or brand and the consumer's reason to purchase based on the values ascribed to the particular brand's attributes (Solomon et al., 2010).

In regard to the latter point, Sheth, Newman and Gross (1991) provide a comprehensive overview of five values that are identified as most influential in regard to consumption, i.e. functional, social, emotional epistemic and conditional value. It is worth noting that these values apply both to product and brand choices, and are highly consistent with the underlying theory of Maslow's 'Hierarchy of needs' (1954). Depending on the brand or product, each value might contribute to a lesser or greater degree to a purchase (Sheth et al., 1991).

While the *functional value* is associated with reliability, price and durability of the brand or product, the *social value* is defined by the degree to which a product or brand will be shared with others (Sheth et al., 1991). The *emotional value* a consumer attaches to a product or brand is related to the emotional response she has to it, thus it is highly subjective (Solomon et al., 2010). Related to the novelty a brand or product and the curiosity it triggers by the consumer, is the *epistemic value*. If this value is perceived as very low, it can result in the consumer changing the brand or product, as she is likely to be bored by it. Finally, *conditional value* is associated with the perceived utility of the product or brand given a certain situation or specific set of circumstances (Sheth et al., 1991).

By linking this to the notion of '*Verfassungsmarketing*' (Rheingold Institute, 2015a) as introduced at the meso level above, the extent to which each of these listed values has an impact on the consumer's brand choice made during a purchase, can be argued to be dependent on the specific psychic state the consumer is in. Thus, even for the same product or brand, the value ratios may vary.

Reviewing the literature addressing the choice of brand further, Keller (2003) proposes the idea of categorizing associations made with a brand into attitudes, benefits and attributes. The latter category constitutes a focus of this research, in particular brand attributes such as brand perception, positioning of brand, distribution channel offered, and, due to this particular industry, the level of given anonymity during the purchase process. Hence, the respective value of each of the attributes ascribed by the consumer is likely to have an impact on the choice of brand (Kotler et al., 2012).

Further, Keller (2003) considers brand association as the link between a consumer's memory and the brand, thus can support forming favorable perception of the brand, which in turn helps the consumer to distinguish between various brand options (Aaker, 1991; Seimienea & Kamarauskaiteb, 2014). Aaker (1991) argues the combination of positive brand associations with a well-defined and communicated positioning of a brand to facilitate the creation of a strong and beneficial brand perception. This is turn is expected to have an impact on the

consumers purchasing behavior, provided that the differentiation from other brands is clear enough (Aaker, 1991).

In summary, based on the shift among the triggers of consumer behavior, thus consumption, toward higher-order needs, comprehending the consumers' cultural values underlying that behavior becomes key for brands. At the same time, the cultural values held impact the values ascribed by consumers to a brand or product and its attributes, hence should be considered by brands to create the aspired brand perception.

In general, it is worth noting that by means of the connections drawn between theories of the different levels of analysis, as done in the review above, the intertwined nature of the three levels of analysis and their respective theories is proven and emphasized.

2.3.3. Hypothesis derived from micro level theories

Based on the theories reviewed above concerning consumer behavior and consumption, the following hypothesis has been derived that is to be verified or falsified in the analysis.

H₅: There is a significant relationship between the perceived degree of masculinity embodied by a brand and the choice of female consumer to not purchase this brand.

3. Methodology and method

This chapter aims to elucidate the theory underpinning the set of research methods and methodology used in this study.

The choice of the scientific approach and the underlying philosophical stance toward the nature of reality and knowledge arose out of the nature of the study. The dimensions of the scientific approach will be applied throughout the entire study and are therefore explained at first. Secondly, the research approach and design will be defined, followed by the research strategy. Next, the methods for data collection and analysis will be described. Subsequently, the topics of reliability, validity and data quality issues will be addressed and finally, the delimitations of this study are outlined.

3.1. Scientific approach and research philosophy

The approach taken in order to examine the problem statement originates from the scientific philosophy of positivism. Thus, an approach representing the assumption that as natural scientists, credible knowledge should only be derived from value-free observations of a phenomenon that can be observed, and given its epistemology, relies mainly on the collection of quantitative data (Saunders et al., 2012).

However, over the recent years, a more contemporary approach of the narrow perspective of positivism has emerged, based on the notion that there is no such thing as neutral knowledge, but that in fact everyone, including scientists, are inherently biased by their cultural experiences and worldviews (Ryan , 2006). Hence, knowledge is perceived as being socially

constructed. Based on this ontology, the dualistic thinking that is fundamental to positivistic scientists is recognized as inadequate, as it neglects the profound complexity and multiplicity of experiences and behaviors (Ryan, 2006; Henderson, 2011; Ackroyd & Hughes, 1992). Therefore, the approach of post-positivism aspires to "*uncover* [...] meanings from people about their multiple interpretations of reality" (Henderson, 2011, p. 343), as well as to see the whole picture in the research (Ryan, 2006).

Regarding the fundamental requirements of positivism, which provide the basis for the postpositivistic approach, Ackroyd & Hughes (1992) argue that positivism should include a combination of different aspects;

First of all, the notion that human knowledge relies on verifiable/falsifiable and observable data that has been systematically assembled and is based on the belief that "*only a phenomena which we can know through our senses [...] can really produce 'knowledge*" (Greener, 2008, p. 16).

Secondly, the way undoubted knowledge should be transmitted is not through empirical experience of the empirical world, but rather it should originate through methods that result logically from rational value-free principles to the greatest extent possible (Saunders et al., 2012).

Finally, Ackroyd & Hughes (1992) argue that the core of constructing scientific knowledge is the method of falsification/verification and deduction. This combination is called the 'Hypothetico-deductive model of explanation', where general statements of the theory used, are utilized as premises for a deductive argument. This argument can then be tested, so that a testable conclusion or prediction can be deducted and compared with the empirical evidence in form of data that has been found throughout the study (Ackroyd & Hughes, 1992, p. 23). Hence, any attempt to verify or falsify the meaning of theory is depending on the degree of accuracy that the evidence is matching the initial hypotheses. It is therefore advised to carry out repetitive studies, in order to establish a high degree of accuracy and applicability (Ackroyd & Hughes, 1992). Given the advice of replication underlying the scientific approach pursued, the present study includes a structured methodology, which will facilitate such replication to verify or falsify the hypotheses derived from the theory this study is based on (Gill & Johnson, 2002 in Saunders et al., 2012).

While this study will still apply the, above outlined, aspects of traditional positivism, the more contemporary notion of post-positivism will be followed, meaning that the researcher of the study is taking a constructivist stance toward the nature of reality. Thereby acknowledging the belief that scientists are no exception to everyone else, thus also are inherently biased by their worldviews and cultural experiences (Greener, 2008).

3.2. Research approach and design

Based on the research structure and analytical framework outlined in *chapter 1*, the research at hand is primarily based on the approach of *deduction*, as the objective of the study is to reveal causal relationships between concepts and variables (Saunders et al., 2012). This approach is considered scientific, as it involves the development and the subsequent testing of theoretical hypotheses, which are derived from the literature review conducted in the next chapter.

In terms of the overall research design, the largest extent of this research takes point of departure in *exploratory* research design, due to its main focus being the understanding of the happenings and the problems of the erotic industry in Germany (Saunders et al., 2012). However, as the premise of exploratory research is to provide a whole picture and gain insights to a respective topic, also elements of *descriptive* and *explanatory* research design will be present in this research. Hence, it can be reasoned that *descriptive* aspects in an exploratory research are a necessity, as a clear theoretical picture of the phenomenon needs to be established prior to the data collection (Saunders et al., 2012). Yet, it is argued that *explanatory* aspects are present in this research to a far greater extend than descriptive ones, as emphasis is placed on the cause-effect relationships between variables to explain the overall situation and problems faced by BU and the industry in general.

3.3. Research strategy

In general, a case study approach was taken toward the research strategy with the purpose of enhancing "*a better understanding of mundane and changing business practices and their social contexts*" (Humphrey & Scapens, 1996 in Eriksson & Kovalainen, 2008, p. 116), as this approach is considered to have the ability to provide answers to 'why', 'what' and 'how' questions. Also, it is primarily used in explanatory and exploratory research designs (Saunders et al., 2012).

However, before elaborating on this approach any further, it should be noted that this is not to be understood as a method of research, but merely as a strategy of addressing the subject matter (Eriksson & Kovalainen, 2008).

Following the definition by Yin (1994), a case study investigates a contemporary phenomenon in its real-life context, where various sources of evidence are used and no distinct boundaries are evident between the phenomenon and the context.

The type of case study chosen for this research is the one of an *extensive case study*, meaning that no focus is placed on any individual. Further, a range of methods is drawn from, i.e. both quantitative and qualitative, while the case itself is seen as an "*instrument that can be used to explore specific business-related phenomena, and [...] develop theoretical propositions*" (Eriksson & Kovalainen, 2008, p. 119). Therefore, testing theoretical propositions by means of empirical data gathered is the main objective of extensive case studies. At the same time the cultural understanding in the context specific to the case is examined and interpreted (Eriksson & Kovalainen, 2008). Further, while producing findings that hold for statistical

generalization is considered difficult, by means of what Yin (1994) calls 'analytic generalization', it can be argued that the findings of an extensive case study can in fact be generalized, provided that it is build on well-grounded theory from which a set of testable propositions has been developed.

Within this strategy the researcher takes the role of an interpreter, who both constructs and analyzes the case, amid the researcher's own cultural experiences and background (Eriksson & Kovalainen, 2008). Consequently, this role is in line with the more contemporary approach of positivism chosen for this study.

To conclude, the focus of this case study strategy is the case of BU and given its room for diversity and complexity in the data collection methods and analysis, this strategy has been found most suitable to approach the present topic.

The details of the data collection methods chosen for this research are provided in the next section.

3.4. Data collection method

In line with the contemporary approach of positivism and the thereupon-based choice of research strategy, a *deductive mixed model* method of data collection has been applied (Ackroyd & Hughes, 1992; Saunders et al., 2012). The primary data set consists of an online-distributed questionnaire, while the secondary data set includes quantitative and qualitative data retrieved from external sources.

3.4.1. Primary data – questionnaire

In this section the different elements that were considered during the collection of the primary data set will be outlined and elaborated on.

3.4.1.1. Target group and sample size

Given the analysis of the industry's landscape and in particular the strategies pursued by the case study brand BU, the characteristics of the target group identified for this research will be outlined in the following.

Based on the fact that Amorelie is currently the leading brand in first and foremost addressing women, as aspired by BU (Beate Uhse AG, 2015), the target group for this study should resemble the official target group of Amorelie to the greatest extent. Amorelie states to target *"modern and self-confident singles and couples […] between the age of 25-54"* (Amorelie GmbH, 2010). This group was then further narrowed down to ensure even more accurate and relevant findings in respect to the overall objectives of this study;
Firstly, the target group should only include women, since this is the gender and consumer group that BU claims itself to have the biggest difficulties with, as identified in *chapter 1* (Beate Uhse AG, 2015).

Secondly, focus is placed on women, who have already searched for information regarding or bought an erotic product at least once via the Internet. The reasoning behind this is to ensure to receive relevant responses from potential consumers, who are a bit familiar with and interested in the particular product category.

Finally, members of the target group should be residents in big German cities, as according to Inglehart's theory of cultural value shifts (1997) here a shift in values, thus an increased aspiration toward self-realization among the female gender, is happening the fastest (Inglehart, 2000). In addition, those are the locations where BU has most of its stores currently (Schütze, 2016; Beate Uhse AG, 2015).

Thus, the target group for the primary data collection is defined as women between 25- 54 years, living in large cities in Germany (> 500.000 residents).

Having defined the psychographics of the target group, the sample size was calculated, to ensure statistical significance of the findings. Therefore, the absolute size of the defined target group had to be estimated based on the total size of the population in Germany. For this purpose the publicly accessible database 'Best4Planning'⁴ was utilized (GIK mbH & Co. KG, n.d). The result showed that the absolute size of the respective target group is approximately 890,000 persons (Appendix 3). The following widely used statistical formula to calculate sample sizes for non-finite populations has then been applied (Saunders et al., 2012).

$$ss = \frac{Z^2 \times (p) \times (1-p)}{c^2}$$

Where:

Z = Z-value (1.96 for 95% confidence level) p = margin error, expressed as decimal (0.5 used for 890,000 persons) c = confidence interval, expressed as decimal (5.0)

Based on this formula, the sample size needed in order for the findings to be statistically significant is estimated to be 384 responses.

3.4.1.2. Collection and sampling

The complete set of quantitative data was collected during a time period of 20 days after the finalization of the questionnaire design.

In general, the choice to conduct an internet-based questionnaire was made, as the study aspires to gather data from cities all over Germany, thus collecting the necessary amount of

⁴ 'Best4Planning' is the biggest market-media study database available for Germany and is considered trustworthy and accurate.

questionnaires for all cities in person would have been difficult to achieve with the limited resources available to the researcher. In addition, it was assumed that due to the rather intimate topic of the research, respondents would feel more comfortable and more likely to answer the questionnaire truthfully, when filling it out alone and anonymously on a laptop or smartphone, rather then in public. Finally, it is assumed that the collection of a holistic and statistically significant data set of all regions in Germany is ensured by this method. Thereby picking up the point of criticism made by Cleveland and Laroche (2007) regarding the ill-advised perspective of simply using countries as the cultural unit of analysis, given the increased multiculturalism and variance in values held in individual countries.

The distribution of the questionnaire was solely online and the social media platform 'Facebook' was the primary channel used to gain access to a highly diverse population within the target group. This decision was based on 'Facebook' being the social media platform used the most by the defined target group within Germany (ARD & ZDF, 2017; Appendix 4). It was deliberately refrained from distributing the online questionnaire through the researcher's personal network, e.g. by the use of mailing lists, or other social media platforms, such as 'LinkedIn', due to the risk of thereby distorting the findings of the questionnaire, as the researcher's personal network is most likely to have an area of expertise in marketing and strategy, as well as being highly educated. Hence, there would have been an increased likelihood of having less diversity within the sampling population, as well as biased answers, due to a rather professional view on the questions asked.

Based on the reasons outlined above, the sampling method chosen was the one of *self-selection sampling* (Saunders et al., 2012), i.e. the respondents chose themselves whether to participate in the research or not. This approach has been identified most suitable, as it is proven to be most effective for research that addresses a private and intimate topic, such as the one at hand (Saunders et al., 2012).

Accordingly, the questionnaire has been randomly distributed by posting it in widely accessed Facebook groups targeting a diverse group of citizens of the thirteen largest cities in Germany⁵ (Statistisches Bundesamt, 2016). For each of these cities, the three groups that had the largest amount of members⁶ on Facebook were selected for posting the questionnaire. Groups that were not considered, despite their large size, were student or university related groups, as well as groups that promote a certain political direction, due to the risk of bias among their members. This resulted in the questionnaire being distributed mostly in groups dedicated to apartment search, buying/selling items and dating, as such groups used and their respective size can be found in appendix 5.

Further, it should be noted that no significant bias was expected in respect to the purpose of the selected groups and the gender, age or education ratio represented among the group

⁵Berlin, Hamburg, Munich, Cologne, Frankfurt (Main), Stuttgart, Düsseldorf, Dortmund, Leipzig, Bremen, Dresden, Hanover, Nurnberg

⁶ Based on the 1st of June, 2017

members, as all purposes were identified to apply to a diverse population. Within each of the 39 groups, the link to the questionnaire together with a standard request of participation has been posted three times within the 20 days period of data collection to ensure to reach the largest amount of participants by being visible on the most recent part of each group's 'wall'.

To conclude, a highly tailored approach of data collection and sampling has been applied throughout the primary data collection of this research, thereby the risk of conducting random errors was kept to a minimum.

3.4.1.3. Questionnaire design

All questions chosen for the questionnaire were either *close-ended* or *forced-choice* questions to facilitate gathering a quantifiable and comparable dataset from such a large amount of participants (Saunders et al., 2012).

The advantages of these types of questions, as opposed to open-ended questions, are first of all, that they eliminate ambiguity, thus are likely to ensure better data quality as the extent to which the researcher needs to actually interpret responses given, is kept to a minimum. Secondly, these types of questions are quicker and easier to answer for the respondents, which is beneficial for a diverse group of respondents in terms of education, as it is the case for the current target group (Saunders et al., 2012).

However, a potential weakness is that the questions must be very well formulated, so that the answers are not reflecting bias, but instead concrete and truthful consumer insights. Further, the answers must be easily interpretable, as otherwise the advantages listed above do not apply (Saunders et al., 2012). Hence, in order to minimize the risk, precautious measures were taken in form of conducting pilot studies to ensure that the questions and answer options are easily understood. Further, the questionnaire is based on relevant and reputable literature and theories.

In general, the main objective of the questionnaire is the testing of consumers' perceptions based on beliefs and attitudes toward attributes and values, thus the questions were constructed accordingly. While attitudes are defined as what people feel, beliefs are referring to the subjective probability that a relation is true or not. Further, values are both linked to beliefs and refer to desirable goals, as well as serve as standards or criteria for most unconscious everyday decisions (Churchill & Iacobucci, 2010; Schwartz, 2012; Inglehart, 2000). In order to uncover all these crucial elements for understanding the consumers and their purchase decisions, the questionnaire was build as follows;

First of all, socio-economic *quota-controls* were applied at the first page of the questionnaire based on the predetermined characteristics of the target group of this study to assure that only answers from the established target group were considered in the subsequent analysis (Ackroyd & Hughes, 1992). These questions revealed gender, age, place of residence, level of education and if interest in erotic products had been shown before online. This measure was

necessary as the questionnaire was distributed online. A page break was inserted after this to visualize the end of the control section.

On the second page, the two dimensions of Inglehart and Welzel's (1997b) cross-cultural map were investigated to equal extent. Therefore, the dimension of *survival vs. self-expression* values, and *traditional vs. secular rational* values were addressed by four questions per dimension, thereby allowing a fair evaluation of the values held by each respondent. Thus, achieving an expedient overview of the resulting attitudes and beliefs.

Accordingly, in terms of the dimension of *survival vs. self-expression* values; gender equality, economic safety, trust and the importance of environment were addressed. For the *traditional vs. secular rational* values; religion, homosexuality, politics and abortion were explored.

It should be noted that the researcher is aware of the limitations of this method of evaluation of the values held by the respondents, as these questions were developed 30 years ago, thus can resonate differently among the respective target group today. Nonetheless, these questions were still posed in the recent wave of the longitudinal WVS (WVS, 2016), thus are acknowledged as means to develop a broad and indicative understanding of the values held by the respondents, based on the resources of this study.

Finally, the third and last page of the questionnaire was dedicated to the present case study and its main competitors. The questions posed on this page were crafted to uncover consumer attitude toward brand attributes, which is acknowledged as the underlying trigger of behavior (Churchill & Iacobucci, 2010), e.g. having an positive attitude toward a brand is more likely to lead to an actual purchase than a negative one. In addition, questions designed to reveal the respondents motivation were included to be able to better understand their behavior, thereby revealing opportunities to influence consumers more effectively in the future. Further, for each brand, questions regarding perceptions and beliefs were standardized to ensure analytical validity by means of data consistency. In order to discover how, where and why consumers purchase erotic products, behavioral questions were asked as well.

In addition, some questions include elements not thoroughly addressed in the literature review, thus, not mentioned in any hypotheses, e.g. price and innovation. This choice was made deliberately to stay open-minded and not limit the research too much based on the developed hypotheses. Depending on the relevance and value of the findings made in regard to these elements, they will then be considered or disregarded in the final analysis.

All in all, the questionnaire was designed to not take longer than seven minutes to avoid respondents stop answering due to loss of interest. Further, the online portal Q-set.de was used to create the questionnaire, as it allowed additional filtering mechanism in the evaluation, as well as preventing participants from filling out more than one questionnaire from the same IP-address. In addition, it allowed for the data gathered to be exported into a SPSS readable file, i.e. the program of choice for the data analysis. This will be elaborated on more in section 3.5 'Method for data analysis'.

3.4.1.4. Measures

In regard to the measures applied throughout the questionnaire, the technique of *itemized rating* has been chosen for most questions, as this is proven to be understood by respondents of all educational backgrounds, thus facilitating a more valuable data output. The questions can further be answered in a shorter time and are perceived 'easier' by the respondents (Schmidt & Hollensen, 2010). These aspects are beneficial for the current questionnaire as it contains a relatively large amount of questions, namely 22.

Within itemized rating, the approach of the *Likert scale* (establish in 1932) was applied, as the questionnaire aimed at measuring attitudes (as a result of values), hence respondents should be able to express the intensity of an attitude, i.e. to what extent one agrees or disagrees with a statement about the stimulus object (Schmidt & Hollensen, 2010). Typically this scale has five response levels with numerical values assigned to them, where one is representing the most negative attitude level and five the most positive. For the questionnaire at hand the following Likert scales were utilized:

- strongly disagree strongly agree
- very unlikely very likely
- very low very high
- very unclear very clear

All questions posed in the questionnaire are neutral or favorable formulated, to assure consistency in the data collected and to avoid recoding of the data gathered. Deliberately, no *importance judgment scale* has been used, due to the threat of thereby provoking a more positive attitude, thus an automatic bias (Saunders et al., 2012; Schmidt & Hollensen, 2010).

In general, the researcher is aware that while in an ideal situation any difference in attitude scores would solely reflect a difference in attitude and nothing else, in reality however, other factors are likely to have an impact as well (Saunders et al., 2012). Such factors are most likely related to individual characteristics, thus one's degree of honesty in expressing true preferences, or perceived lack of clarity, e.g. different interpretations of ambiguous questions.

Another point of criticism in terms of this method is the translation of the questions. Since the original questions of the questionnaire were formulated in English language, being the language used throughout this paper, the questions had to be translated into German, which carries the risk of translations issues (Saunders et al., 2012).

However, precautions and adjustments to keep these risks to a minimum were taken by means of implementing considerations from the pilot study taken, and through assuring the maintenance of the meaning of the original English questions in German, especially for lexical and experimental meaning by testing its comprehensiveness among German native speakers (Usunier, 1998, in Saunders et al., 2012).

3.4.2. Secondary data

The secondary data used for the purpose of this research includes official company data from the brands of interest (BU, Orion, Amorelie and Eis.de), newspaper articles from well-known and reputable German publishing houses (Hamburger Abendblatt, Die Welt, Der Stern, Handelsblatt, Wirtschafts Woche), as well as studies and data from acknowledged research institutes and databases (Statista and Nielsen). Further, Inglehart and Welzel's cross-cultural map developed based on the findings made throughout the WVS (WVS 6th wave, 2015; appendix 6) are applied as a secondary data source.

The researcher of this study has interpreted the secondary data utilized in the analysis. A point of criticism here is the expected subjectivity and influence by the researcher's experience and cultural background. However, in line with the scientific approach of this study, it is accepted that neutral knowledge does not exist (Ryan, 2006).

Following that approach of post-positivism and the research strategy applied further, the secondary data utilized consists of both *quantitative* and *qualitative* data types. These types of data are used to supplement the quantitative data gathering process of the online questionnaire, thereby minimizing any misunderstandings that could distort the objectivity of this study. Thereby, the weaknesses of each method are compensated to provide a richer understanding and holistic examination of the phenomenon at hand. Further, the secondary data included allows the consideration of additional influential factors, which to investigate are beyond the resources of this paper.

3.5. Method for statistical data analysis

In alignment with the positivistic approach and the underlying hypotheses, the quantitative analytical methodology was developed in three steps of applying statistical tests.

The first step was to filter the data gathered in the questionnaire tool according to the characteristics of the established target group and then import the newly created data file into SPSS. Subsequently, value labels were created for all variables, to ensure ease of use and comprehension of the data set (Janssens et al., 2010). Basic descriptive statistical tests (percent and means) were ran in SPSS, which will serve as a basis for describing the data set throughout the analysis. Through the creation of frequency tables and calculations of mean values and standard deviations, a general overview of the data gathered was obtained (Janssens et al., 2010).

In the next step, each variable was looked at separately at first and then average scores were compared to reveal potential differences. For that purpose, if necessary variables were recoded into a 'dummy variable', thereby splitting the responses gathered in the multiple-choice grids of the questionnaire per brand to then code them into favorable (new value=1) and unfavorable responses (new value=0), respective to the hypothesis related to the question (Schmidt & Hollensen, 2010). Lastly, these newly coded variables were put to the test of a crosstab analysis, also called contingency table, to uncover the type of relationships between

the variables (Keller G. , 2014). This will provide the basis for the conclusions drawn in the following analysis.

The third and final step, was to conduct a chi-square test of independence, in order to ensure statistical significance of the findings, as well as to be able to verify or reject the respective null-hypothesis, based on the chi-square value and the p-value, thus the asymptotic significance⁷ (Keller G. , 2014). For certain hypotheses, an additional layer was added to the crosstab and the chi-square test with the purpose of finding more distinct results for a subpopulation.

However, it is pertinent to note that this analysis does not establish a cause-effect relationship, as in fact no mathematical procedure can be utilized to ascertain causality. Instead, the results of the tests described above will provide indications, based on assumptions (Janssens et al., 2010).

3.6. Research quality

While there is always a certain degree of error in research, which is determined to be "the difference between the information sought and the information actually obtained in the measurement process" (Schmidt & Hollensen, 2010, p. 126), the concepts of reliability and validity are steadily applied to assess any errors made in the measurement instruments of a study. Reliability is hereby a necessary, but not sufficient condition for a research to also be valid, as also the theory and observation techniques used affect validity (Schmidt & Hollensen, 2010). How these concepts apply to this research will be elucidated below.

3.6.1. Reliability

There are two potential sources of error; systematic errors, i.e. caused by a constant bias in research design, and random errors, for which to detect the concept of reliability is applied (Schmidt & Hollensen, 2010). Depending on the degree to which scales are free of random error, thus produce consistent results during replications of the same study, a study is recognized as reliable or not. It should be noted that systematic errors do not lessen the reliability of a research, as they consistently influence the measurement (Schmidt & Hollensen, 2010).

While there are several measures available to test the degree of reliability of a study and its scales, the implementation of these were beyond the scope this paper and its constraint in resources. Nonetheless, as this research is based on a very detailed methodological approach and structure, as outlined above, and applies standardized questions, as well as utilizes scales that are widely recognized and proven by scholars, the present research is easily replicable (Saunders et al., 2012; Schmidt & Hollensen, 2010). Ergo, this research is reliable.

⁷ For all analyses the α-level is .05, thus $p \le .05$ (reject null); p > .05 (retain null)

3.6.2. Validity

Validity is defined as the best available approximation to the truth of a given proposition, inference, or conclusion. Accordingly, the quality of all the various parts of the research methodology that together constitute the entire study, lead to valid conclusions (Schmidt & Hollensen, 2010).

In terms of *internal validity*, thus the strength of the study to assign causes to outcomes without manipulating the independent variable (Bryman & Bell, 2007), several precautious statistical, theoretical and sample measures were applied to achieve high internal validity. *Concurrent validity* was established for this study by means of assessing the correlating relationship of measure and variable and its corresponding ability to predict the dependent variable based on new information. Thus, if the correlation is high, the validity of the prediction is likely to be high (Schmidt & Hollensen, 2010).

Further, *discriminate validity* was achieved by ensuring that scales measuring unrelated concepts do not correlate, e.g. the perceived level of innovation of one brand with the attractiveness of the distribution channel of another brand (Schmidt & Hollensen, 2010). Finally, *content validity* has been secured through the use of scales pre-validated by literature and theorists, such as the Likert-scale, as well as by having marketing experts assess the scales (Schmidt & Hollensen, 2010). However, it is noted that this is a rather subjective validation technique, as the assessment is depended on the individual's personal experience and beliefs.

The factors advocating for a high *generalizability*, thus *external validity*, are, firstly, the study's large sample size that is proven to be statistically representative (Bryman & Bell, 2007). Secondly, the data collection is based on simple, no-ambiguous questions as facilitated by the trial studies conducted. Finally, the widespread location and demographic diversity (age and education) of the respondents provides a fairly good overview of the phenomenon at hand across several social classes in entire Germany. However, speaking against a high degree of generalizability is the overarching fact that within consumer behavior related researches findings are not that easily generalizable, as they might be found to be very distinct to the research's respective target group (Saunders et al., 2012). This valid for the present research topic, given its intimacy, thus the level of generalizability, i.e. the degree of external validity, of this research is considered to be medium.

To summarize, ideally a measurement should be both valid and reliable and based on the argumentation above, the reliability and validity of this study's measures are regarded as medium to high, thus very likely to lead to valid conclusions.

3.6.3. Data quality issues

Having outlined the methodology and methods applied throughout the study, in respect to potential data quality issues the following points should be addressed.

The first point of criticism is the choice of hypotheses, which causes bias in the researcher's focus risking to unconsciously limiting herself and thus the research. However, being aware of this risk, the researcher strived to remain open and curious for other findings that might occur throughout the research, as done by means of including elements in the questionnaire not addressed in the literature review nor in any hypotheses derived from that.

In addition, the data collection method chosen can be criticized; the lack of follow-up interviews with respondents of the questionnaire weakens the quality of the quantitative findings gained, as interviews would have provided a better understanding and foundation for the researcher to analyze the findings (Saunders et al., 2012). Instead, the interpretation of the data is based on the researcher's personal background. This is however, in line with this research's scientific foundation, i.e. post-positivism.

Finally, the little or not differentiated enough data found in data bases, such as 'Passport' or 'Orbis', could have limited the conclusions drawn from this research.

3.7. Delimitations

Based on the limited amount of space and other resources, this study's research strategy is only focused on a single case study. Further, for the respective case study of BU solely the activities and brand performance of the corporate brand in Germany are considered. Aware of the abundance of factors likely to have an impact on the performance of a brand, this research will merely analyze external factors that are of influence, hence not the internal strategy and organizational structure of BU.

Additionally, to delimit the focus of the three-level analysis conducted, for the macro level only technological and socio-cultural factors are focused on, while for the meso level focus lays on industry forces, distribution channel strategies, and segmentation and positioning approaches. Finally, at the micro level, no detailed analysis of the consumer's decision-making process that leads to purchase is conducted, instead focus is placed on consumer behavior, brand perception and consumption. This delimited focus is chosen based on its alignment with the research questions established and the areas of impact identified throughout desk research of the industry conducted prior to this study.

Moreover, it should be considered that the overarching topic of this study, being sexuality, is a very complex and subjective subject matter in itself, due to the impact of various psychological and experiential aspects, which are found to be highly dependent on one's individual immediate environment (McCarthy & Bodnar, 2005). Consequently, the findings made within this research are by no means all embracing, nor should be considered the only explanation for the development in the industry and its consumer's behavior.

Thus, it is acknowledged that this research can neither deliver an exhaustive analysis of all factors that have influenced the erotic industry, especially BU and its consumers, nor can the findings made be generalized for other age groups, genders, industries or countries.

Nevertheless, this research provides an interesting and relevant insight with revealing conclusions that will then be able to function as a valuable foundation for answering the problem statement at hand, as well as constituting a point of departure for further research.

4. Analysis and Discussion

In this section, first, the initial findings of the descriptive statistics of the data gathered will be presented, while the second part of the analysis will be organized according to the three levels structuring this research paper. However, only the most significant and valuable results in regard to the research questions of this paper will be presented, firstly for the micro-level, followed by the meso-level and finally the macro-level. This reverse order from a narrow to broad focus is chosen deliberately, thereby constructing the analysis in a way that leaves the reader at an ideal starting point for following the conclusion and future prospects presented subsequently.

The analysis conducted in this section is further guided by, but not limited to, the hypotheses established for this research. In addition and as a consequence of the reversed order the hypotheses are not answered chronologically.

The data gathered will be analyzed in accordance to the procedures outlined in the 'method for statistical data analysis' (*section 3.5*). Due to the integration of analysis and discussion in this research, the findings made will immediately be placed in context of the respective research question by means of incorporating aspects from the literature review.

It should be noted that the purpose of the data gathered for the subsequent sections is to gain more background knowledge about the market, due to the dilemma of only little external data available. Thus, the results of the following analysis are also used to benchmark external data found, hereby increasing the external validity of the research.

4.1. Initial findings – Demographics and descriptive statistics

In total 834 completely answered questionnaires were gathered during this research, however only 386 participants from Germany fulfilled the quota controls for the established target group. Thus, the statistical required sample size of 384 participants was reached.

Given the quota controls 100% of the 386 participants were female (Question (Q.) 1). In terms of age, 47.2% belonged to the age group of 25-34, while 31.9% were between 35-44 and 20.9% were 45-54 years old, thus, a rather balanced result in respect to age (Q.2; appendix 7).

In regard to the cities of residence (Q.3), a balanced representation of all twelve listed cities has been achieved *(table 2)*, hence the conclusions derived from this studies are considered valuable and relevant for all regions of Germany, despite a very likely difference between rural and urban areas, as argued for by Inglehart & Baker (2000). It should however be noted that the amount of participants per city was not proportional to the respective size of each

City of residence	Percentage of total sample:
Berlin	12.2%
Hamburg	11.6%
Bremen	10.4%
Leipzig	8.0 %
Cologne	7.3%
Dresden	6.2%
Dortmund	6.2%
Stuttgart	6.2%
Munich	6%
Nurnberg	6%
Frankfurt (Main)	6%
Hannover	5.6%
Düsseldorf	5.2%

city, instead the collective majority of the participants was located in Berlin (12.2%), Hamburg (11.6%) and Bremen (10.4%).

Table 2: Percentage distribution of city of residence; source: appendix 7

The educational level (Q.4) of the participants was rather high, with 28% of the total population having obtained a Master's degree or Ph.D. and 26% holding a Bachelor's degree (Appendix 7).

4.2. Micro level

The following analysis and discussion is broken down coherent to the structure of the literature review.

4.2.1. Consumer behavior and culture

According to the latest data collection of the German erotic industry, the brand Eis.de dominates the group of incumbents in respect to annual customers with 7.7M in 2016 (Eis.de, 2017). However, within the target group of this research, thus women between 25 and 54, the results gathered in terms of preferred brand choice $(Q.16)^8$ clearly show a preference toward the brand Amorelie, as 55.5% of all participants would choose or have chosen it when purchasing an erotic product. Eis.de reached 23.3% consent, followed by Orion with 12.2%, while only 3.9% indicated to choose BU. The remaining 5.2% of the participants would choose a brand outside of the focus set (Twelve different ones were named here; see appendix 7).

⁸ Q.16 built the base for the most parts of the following analysis, which will be concerned with testing the degree to which the results found throughout this research can be utilized as significant predicators and indicators for behavior results.

These figures clearly emphasize the difficulties BU has been reported to have in establishing itself among the consumer group of women, while Amorelie's strategy seems to work well in terms of its appeal to women among their target group. Further, the results show that the two long-existing incumbents BU and Orion lag far behind the newer market entrants within this female consumer group.

In order to test the results against any possible effect the city of residence has on the brand preference, a crosstab analysis was conducted (Appendix 8). However, while an association between these two variables was found, it is considered too small to be of statistical significance. Therefore, for the remaining part of the analysis the individual impact of each city will not be taken into consideration.

As a deeper understanding of the reasons behind the choice of brand preferences made by the respondents is aspired, the answers given in terms of brand attributes that are likely to influence the purchase are reviewed (Q.17).

The results, when comparing means, for all evaluated attributes (brand perception, clarity of brand positioning, distribution channel available, innovation level, price and level of anonymity) were rated relatively similarly at a rather high level, i.e. an average mean of all six attributes of 3.62 out of 5. This suggests a rather high level of consumers' involvement for this industry, which can be linked to the overall trend observed among postmodern consumers to aspire higher-order needs (Maslow, 1954), as the fulfillment of esteem- and self-actualization needs is likely to motivate higher engagement with the product and brand, and eventually a change in consumers' behavior (Karahanna et al., 2005).

4.2.2. Consumption and brand perception

In more detail, '*clarity of brand positioning*' is rated the most influencing attribute among the set, while the '*innovation level*' is rated least influencing. Also, '*price*' and the '*distribution channel available*' are valued as influencing. In addition, the standard deviation indicates that the respondents' opinions in respect to the influence of '*price*' are much more alike, as opposed to '*clarity of brand positioning*' (Appendix 9).

Further, to examine the results found above in relation to the participants' respective brand choice preference, the same attributes were subjected to a one-way ANOVA *(table 3)*. The differences found between the brand supporters' ratings of most and least likely influential attribute are significant at a 95% confidence level, i.e. for '*brand perception'*, ratings of Amorelie supporters differ significantly from that of BU supporters.

Attribute	Most likely among	Least likely among
	supporters of:	supporters of:
Brand perception	Amorelie (3.96)	BU (2.8)
	Eis.de (3.4)	Other brands (2.85)
Clarity brand positioning	Amorelie (4.42)	Other brands (2.7)
	Orion (3.49)	BU (2.93)
Distribution channel available	Amorelie (4.08)	BU (3.0)
	Eis.de (3.69)	Other brands (3.3)
Innovation level	Other brands (3.6)	Amorelie (2.53)
	Eis.de (3.1)	Orion (2.6)
Price	Eis.de (4.16)	Other brands (3.7)
	Orion (4.04)	Amorelie (3.71)
Level of anonymity	Amorelie (3.9)	Other brands (2.9)
	Orion (3.7)	BU (3.6)

Table 3: Attributes likely to influence purchase (mean values based on ANOVA); source: appendix 11)

The data shows that consumer, who choose Amorelie, place especially high emphasize on the '*perception*' they have of the brand they are going to purchase from, as well as the '*clarity of the positioning of that brand*', and the '*distribution channels available*'. In contrast, for the exactly same attributes, supporters of BU rate among the lowest in terms of the level of influence. The same ratio applies for the attribute '*level of anonymity*' (Janssens et al., 2010).

Consequently, the findings indicate that the preferences in brand choice made by the participants are somewhat related to the degree of how well each of the attributes listed are implemented by the respective brands; for instance, based on the high importance placed on *'level of anonymity'* by supporters of Amorelie, it can be assumed that these respondents have chosen precisely that brand, given, inter alia, its highly anonymous online shop (Möthe, 2015). On the other hand, a rather low level of influence ascribed to this attribute might indicate that this part of the sample population is ready to openly embrace their sexuality and desires. Correspondingly, the reason why supporters of BU place little emphasize on this attribute, could be related to BU still selling through brick and mortar stores, thus their customers are simply used to be seen in public while purchasing erotic products.

It is further worth noting that the supporters of Eis.de rate '*price*' as a highly influential attribute, which accompanies with the brand's aimed direction of cost-leadership (Geißler, 2016; Porter, 1985).

Moreover, a look will be taken at the attribute '*innovation level*' as the overall low ratings of influence for the '*innovation level*' (Q.17) raised the question of the relevance of this attribute for the overall analysis. The results of the ANOVA above (*table 3*) indicate that '*innovation level*' is the main trigger for consumers to choose another brand over the four in the set. However, the final brand choice is most likely based on a combination of influence levels of brand attributes (Solomon et al., 2010).

Looking further at the marginal mean values of the ratings for the overall level of innovation pursued by the particular brands (Q.18), as predicted based on the industry overview provided in the introduction chapter, Amorelie and Eis.de are rated to have by far the highest level of innovation; on the contrary, both BU and Orion were rated low (Appendix 10). Correspondingly, these results confirm the findings made in secondary data sources, yet, are considered of adding only little value to the conclusions drawn for the four brands in focus of this research, as also the variance in opinion was particularly large. A reason for this might be that the estimation of the degree of innovation of an erotic product goes beyond the expertise of a layman within this product category. Further, perhaps the definition of the term 'innovation' should have been more precise, i.e. whether it is referring to marketing activities as well as product offerings.

Moving on, in line with Keller's (2003) argumentation for brand associations, the review of the preferences in brand choice and how this is related to the brand attributes identified important for the erotic industry, enables a better comprehension of the results gathered for individual brand perceptions (Q. 22). By means of re-coding the variables for brand choice into dummy variables referring to not choosing the brand ⁹ and re-coding the interval scale into a 'degree of masculinity' ^{9,10}, these new variables were then subjected to a crosstab analysis to identify the relationship between the not-choosing of a brand and the perceived degree of masculinity of that brand (Appendix 12). *Table 4* shows the residuals, thus the differences in expected versus actual count, which are proven to be statistical significant at .05 (Appendix 12).

Given that all residuals are positive and their relationships are found statistically significant, the following hypothesis is therefore *accepted*:

Brand	Residual of the value (1) variables
Amorelie	24.2
Eis.de	15.2
BU	7.8
Orion	9.7

 H_5 : There is a significant relationship between the perceived degree of masculinity embodied by a brand and the choice of female consumer to not purchase this brand.

Table 4: Residuals (expected vs. observed count) crosstab analysis; source: appendix 12

Further, a diagram (*Figure 4*) has been constructed to ensure a comprehensive overview of the additional findings made regarding the perceptions of '*boring vs. exciting*' and '*repulsive vs. appealing*' for each brand (Q.22; Appendix 7). The results illustrate that all means seem to almost increase proportional to the most recent launch date of the brand, i.e. Eis.de is the second-recent brand that entered the market and ranks second on all favorable aspects.

⁹ Favorable statement made unfavorable for this analysis

¹⁰ Masculine-oriented (scale ≤ 5 ; assigned value (1)) and feminine-oriented (scale ≥ 6 ; assigned value (0))

Thus, the favoritism of Amorelie found in terms of brand choice (Q.16) is confirmed in the brand's overall favorable brand perception, therefore the general trend of Amorelie being most attractive to the population of this research prevails. At the same time, the unfavorable position BU is situated in currently is confirmed, as the brand performs poorly across all perception elements chosen for the research.

It should be noted that the classification of 'favorable' made here, was based on what has been found to be perceived as favorable by the target group according to secondary data sources (Geißler, 2016; Möthe, 2015).



Figure 4: brand perception based on mean values; source: appendix 7

4.2.3. Answering of the research question

In terms of the guiding research question for this level "How is the current brand perception of Beate Uhse related to the present failure of the brand to gain back its former market leader position in the German erotic industry?" the current failure of BU in the German erotic industry is assumed to be related to the unfavorable brand perception that the brand has among its desired target group, thus the population of the research conducted for this study, in the way that these consumers are assumed to be unlikely to chose BU as the brand that will help them fulfill their high-order needs (Maslow, 1954; Kim et al., 2002). For the high aspirations, women in Germany have toward themselves, thus to esteem and self-actualization needs (Inglehart, 1997b), they are very improbable to choose a brand, the perception of which, does not resemble their personal cultural values, and consequently their attitudes and beliefs held (Karahanna et al., 2005). As women are less and less (economically) dependent on men, this independence is now also taken up to the level of sexual satisfaction and pleasure, as the presence of a man is no longer a necessity for achieving that.

Hereby, the perceived extent to which a brand is oriented toward masculinity is assumed to be of large impact on the choice of brand made by female consumers. This can simply be as they

might not feel addressed, but also because women are 'trained' to not feel addressed by such a masculine-oriented brand, such as BU is perceived, given the empowerment of women that is happening in the German society. Thus, this will most likely have negative consequences for the respective brand perception (*Figure 4*).

Additional reasons that speak against the consideration of BU for this purpose, can be found when looking at respondents that chose Amorelie, thus belong to the target group most desired by BU, as explained previously;

First of all, in regard to consumer involvement, which has been found to be another aspect tied to the consumer's decision to purchase from a particular brand (Solomon et al., 2010), respondents choosing Amorelie have a much higher involvement in the brand than those, who chose BU (Q.17, appendix 9), therefore it can be argued that BU is not perceived as particularly appealing to those high-involved consumers, whose current brand of choice is Amorelie.

Secondly, in terms of the values influencing consumption (Sheth et al. 1991) for this product category and the corresponding brands, the *emotional* and *social values* are likely to be highly influencing, as sexuality is considered a very personal and usually emotionally rich topic (McCarthy & Bodnar, 2005), which is coherent to higher-order needs, as they are more complex and subjectively chosen (Maslow, 1954; Inglehart, 1997a). Consequently, based on the perceptions of each brand found throughout this research, Amorelie, and also Eis.de, can reasonably be argued to be likely to have the highest degree of *emotional* and *social values*, as those two brands are rated high on all favorable associations (*Figure 4*). Hence, according to Keller's (2003) and Aaker's (1991) argumentation that the more favorable the associations a consumer has with a brand based on the values ascribed to it, the more favorable the perception of that brand, it is implied that based on the low degree of *social* and *emotional values* provided for female consumers, BU has so far been unable to change the unfavorable perception of its brand. Based on the discussion above, BU therefore fails to attract female consumers, which appear to be the key for its race to catch up in the erotic market in Germany.

To summarize, the hypothesis developed for the micro level of analysis is accepted on significant statistical grounds, and based on the analysis and discussion of the findings it was found that due to the rather unfavorable perception that the sample population of this research has of BU, consumers do not choose this brand, as Amorelie or Eis.de simply offer a better choice, due to higher alignment with the consumers' values and attitudes, especially in terms of the brand's perceived degree of feminine orientation, as well as its ability to support postmodern consumers in fulfilling their higher-order needs.

4.3. Meso level

In this section the findings for the meso level will be analyzed and discussed in alignment with the structure chosen for the literature review of this level.

4.3.1. Industry forces

Moving the focus to the general competitive environment of the erotic industry in Germany, the 'threat of new market entry' according to Porter's 'Five Forces' (1980), has increased throughout the last years and is now considered relatively high. This is due to a rather low cost of new market entry, given that no high investments are necessary, based on the technological developments as outlined in the literature review, and the resulting raise of e-commerce options. Thus, brick- and mortar stores are not a necessity anymore. Further, the ethical entry barrier has been lowered significantly, making it easier for new entrants to find investors (Möthe, 2015).

The 'threat of new substitutes' and the 'bargaining power of suppliers' are defined as relatively low; while there might be product alterations or product line extensions, the products that fulfill the need of physical sexual satisfaction and pleasure are to be tangible, hence the basic concept of those products are unlikely to be object of substitution soon, neither is the material exceptionally rare. Further, the 'bargaining power of buyers' is highly dependent on the choice of distribution channel made by the brand. For example when choosing direct e-commerce, brands are able to bypass the force of middlemen, thereby the 'only' bargaining power remains with the end-consumer, who is very likely to be well informed and able to compare offers by means of the Internet.

Finally, the force of '*rivalry among competing firms*' has increased recently ever since Eis.de entered the industry in 2004. Up until then BU and Orion seemed to have agreed tacitly to coexist, due to the absence of serious power or threat from any of the other forces. The new entrants however, forced the existing incumbents to re-position themselves for retaliation purposes and in order to get a share of the new customer group, thus the uncontested market space constituted by women and couples (Wirtschafts Woche, 2015; Geißler, 2016).

Given this recent development and the overall focus of this research, thus its relevance to BU, the main focus of the following analysis is placed on the '*force of rivalry*', as the positioning of each brand is becoming crucial for successfully competing against one another.

4.3.2. Competitive forces – segmentation and positioning

Reviewing the data collected in regard to the importance of the positioning of a brand, which, as argued in the literature review, is highly connected to the process of segmentation (Dibb, 1998), it becomes evident that the target group at hand places an outstanding emphasize on the positive influence that the degree of clarity of a brand's positioning has on one's purchase decision (Q. 20); 74.1 % of all respondents agreed to this statement with 'agree' or 'strongly agree' (Appendix 7). This supports various theories that stress the importance of positioning to be crucial for success, providing the foundation for marketing strategy and other processes (Wind & Bell, 2008; Kotler et al., 2012; McDonald & Dunbar, 2012).

Looking then at the marginal means for the ratings of the perceived clarity of the positioning of each brand present in this study (Q. 21), it is shown that Amorelie is rated to have the

clearest brand perception (4.27), closely followed by BU (4.19). However, both Eis.de (2.77) and Orion (2.75) are rated rather low in this respect.

Similarly with the variance level; the respondents' opinions are more alike for Amorelie and BU for this question, while for both Eis.de and Orion the opinions vary more greatly (Appendix 19).

Given the results above and the objective to analyze the 'force of rivalry' more in-depth, a perceptual competitive positioning map (figure 5) has been constructed based on secondary data sources, thus established according to the brands' claims, rather than the consumers' perception as done in figure 4 above, in order to gain a better understanding of how brands aspire to respond to consumers' needs. The map outlined below applies to the products and services that are offered by each brand.

It should be noted, that it was deliberately chosen to not follow Kotler's STP-model (1984) to ensure better comprehensibility, given that the map will serve as a framework for the following analysis and discussion.

The dimension of women- vs. men-focused has been chosen in order to allow a comparison with the data gathered for this brand benefit for Q.22. Further, instead of simply choosing 'price' as a dimension, a more narrowed benefit has been selected, as the prices for the different products in the portfolio of each brand vary greatly.



Figure 5: Two-dimensional positioning map, created by the author of this thesis, according to company information

From the two-dimensional map it can be seen that most players position themselves in the more women-focused area of the market. In addition, only Amorelie, clearly positioned as a high-quality female oriented brand, thus following a focus differentiation strategy, and Eis.de,

with its distinct focus on value for money and equally targeting men and women (couples), thus pursuing a cost-leadership strategy, offer a believable unique selling point for the consumers by differentiating themselves (Kotler et al., 2012; Porter, 1985).

Both, Orion and BU however are positioned rather broadly; hence consumers are likely to be unable to clearly distinguish between them, as according to Porter (1985) they are running into the error of 'under-positioning'.

In terms of Ansoff's matrix (1965), it can be said that Amorelie, and partly Eis.de, pursue the strategy of 'Market Development', given their approaching of uncontested market space in the industry, while the market incumbents Orion and BU still seem to be focused on 'Market Penetration'.

Nonetheless, the data collected throughout the primary research of this study evidently shows that BU is recognized as rather clearly positioned by the target group (Q. 21). However, it becomes evident that there is a large gap present between the way BU's positioning is perceived by their aspired target group *(figure 4)* and the positioning that BU claims itself to have in the current market (Beate Uhse AG, 2015).

The profound dimension of this dilemma is revealed when looking at the residuals resulting from the crosstab analysis that compare the brand preferences (Q.16) with the perceived clarity of the positioning of that brand (Q.21). This was done by re-coding the variables for brand preferences into two new populations, similarly done to the variable for the clarity of the positioning¹¹.

As it can be seen in *table 5* below the residuals for this 2-layered crosstab are only positive and significant at .05 for the brands Amorelie, Eis.de and Orion, while BU has a negative relationship for those variables (Appendix 20).

These findings were then reviewed in more detail, thus in relation to the brand attribute *'clarity of brand positioning'* (Q.17) influential for purchase, to test if the negative relationship found for BU is caused by some parts of the sample simply not considering the clarity of the brand positioning as influential. Therefore, this layer was added in form of a newly re-coded variable to the crosstab, where the two populations are defined by whether or not they rated this attribute as influential ¹² (Appendix 21).

However, as displayed in *table 5*, the test still revealed a negative relationship for BU, while now also Orion only has a neutral relationship for these three variables. Nonetheless, Amorelie and Eis.de still have a positive relationship, even though to a lesser degree.

Given these findings, the following hypothesis is *partly accepted*:

H4: There is a positive relationship between the choice of brand and the consumer's perceived clarity of positioning of that brand

¹¹ Re-coding of Likert-scale into two populations: 'strongly agree' & 'agree' assigned value (1); remaining responses assigned value (0)

¹² Re-coding of Likert-scale into two populations: 'very likely' & 'likely' assigned value (1); remaining responses assigned value (0)

Brand	Residual of the value (1) variables	
	2 layers	3 layers
Amorelie	36.4	14.3
Eis.de	25.5	17.1
BU	- 0.9	- 0.2
Orion	2.4	0

Table 5: Residuals of layered crosstab analyses; source: appendix 20 & 21

The implications that can be drawn from this are that, despite the fact that BU is clearly positioned in the consumers' minds, such clarity of positioning is of no benefit for the brand, as the perceived positioning does not match the postmodern image of women, but instead seems to be based on the old and very male-oriented brand image.

In fact, the brand is hindered by its former strong positioning, in the sense that now, despite various marketing efforts, the newly aspired target group does not consider BU as relevant for their needs.

In respect to the approaches taken on segmentation by the brands, it can be assumed that demographic and socio-economic segmentation schools are applied, as both age and gender are important factors in this market. In respect to benefit segmentation, i.e. attitudinal characteristics, the benefits considered by each brand seem to differ.

It becomes however evident that Amorelie focuses clearly on isolating itself from the remainder of the market by considering the benefit of aesthetics and high quality (Amorelie, 2016). Similarly, Eis.de targets a younger segment of the market that prioritizes value for money and a more 'light' approach toward sexuality in general (Eis.de, 2017). Therefore, these two brand seem to have achieved to target a truly homogenous segment of consumers in the market, by ensuring that the, on a macro-level apparent, homogenous characteristics also sustain on a behavioral level, which is of actual relevance to the brand's product offering (McDonald & Dunbar, 2012; Wind & Bell, 2008).

Abell's three-dimensional tool (1980) is not applied at this point, due to its limitation of not considering external factors, which dissents with the overall aim of this thesis.

Further, crucial for a successful segmentation is to find the 'right' definition of the market and according to Amorelie's and Eis.de's approaches, the respective market for the erotic industry is argued to be the lifestyle and wellness market, as a sex toy is not any longer only seen as an object of satisfaction, but rather as a appropriate means to it that should fit the respective consumer's lifestyle (Amorelie, 2010; McDonald & Dunbar, 2012).

Nonetheless, it is pertinent to note that in line with the theory of 'Verfassungsmarketing' (Rheingold Institute, 2015a), brands nowadays must acknowledge that postmodern consumers are likely to make a brand choice depending on their mental stage and the occasion for the purchase. For example, for a fun birthday present a consumer is likely to chose Eis.de, due to the brand's image of value for money, while when shopping for oneself, the same consumer might chose Amorelie, as the demand toward quality and design might be higher, as well as that the consumer is certain of what she desires, thus it is likely that more money will be

spend on the product. Following the theory further, it could be argued that Eis.de and Amorelie are not even direct competitors, as they serve such differentiated target segments. Instead, the money invested in a product from Amorelie might be competing against a Spa treatment, as both are about the mental psyche and wellness of the consumer to value herself and strive toward self-fulfillment, while at the same time represent a certain lifestyle.

4.3.3. Distribution

Reviewing the attribute of distribution channel, by means of grouping the variables for the multiple answer question regarding distribution channel preferences (Q.14), it was found that 91.7% of all respondents prefer to purchase erotic products via an online store accessible through a PC or laptop. Further, 75.1% indicate a preference for an online store via a mobile device, followed by only 32.1% voting for physical stores and with a support of only 1.8%, catalogue ordering is by far the least favored channel¹³ (Appendix 13).

In order to reveal how many respondents, who prefer a certain channel belong to which age cohort (Q.2), the newly defined variable set was applied in a crosstab analysis, the results of which are proven to be statistical significant at .05 (Appendix 14). The highlights of the results are displayed in *table 6*.

Channel preference	Share per age group
Online channel via PC/laptop	44.6% are 25 – 34 y/o
	33.6% are 35 – 44 y/o
Online channel via mobile device	43.8% are 25 – 34 y/o
	35.5% are 34 – 44 y/o
Physical stores	60.5% are 25 – 34 y/o

Table 6: Main findings of cross tab analysis; source: appendix 14

Rather surprisingly 60.5 % of all respondents, who selected 'physical stores' as a preference belong to the youngest age cohort of the sample. This might be due to younger women being more comfortable with being seen in person while browsing erotic products, as their values might be even more postmodern than those of older women, given inter-generational differences and that most values are established at a young age. Thus, younger women are likely to be raised in an already more postmodern environment, as argued for by Inglehart (1997a; 1997b).

Further, the trends of '*webrooming*' and '*showrooming*', as explained in the literature review (Verhoef et al., 2015), might be of influence, in the way that younger females are more likely to follow these trends, given their higher affinity to mobile devices and the Internet in general (Boniversum, n.d.). Hence, they are likely to simultaneously browse in store while seeking for better offers via their smart phone or inform themselves beforehand online, but then buy offline. Taking this into consideration, the fact that both Orion and BU still have brick and

¹³ Due to multiple answer question: total N=775; total percentage=200.8%

mortar stores would be assumed to be an advantage over the online-only players Eis.de and Amorelie.

Yet, when comparing the means of the attractiveness of the distribution channels offered per brand (Q.19), it becomes evident that both Amorelie and Eis.de are rated to have a high attractiveness (both 4.16), while Orion's is much lower (2.46) and BU's is rated the lowest in this regard (2.17). However, according to the degree of variance, the opinions for BU are rather widespread, while for all other brands the participants' opinions resemble closely (Appendix 15), leading to the assumption that this topic is very subjectively rated for BU.

The findings above and secondary data sources clearly indicate a strong preference among the target group of this research toward online channels, thus the necessity of brick and mortar stores becomes questionable and therefore also Verhoef et al. (2015) claim that '*webrooming*' and '*showrooming*' actually is a popular trend. Further, to what extent consumers of the erotic industry actually demand a *cross-channel approach* nowadays, thus the offering of interchangeably touch points as pursued by BU.

Further, while BU's cross-channel approach might sound desirable in theory from a marketing perspective, the necessary synergy of all channels and their performances is difficult and costly to achieve in reality, hence poorly implemented, this approach is likely to backfire (Verhoef et al., 2015). Moreover, the channel preferences vary between customers and the situation, and especially for women that want to buy a sex-toy for themselves, an online channel might still be the most comfortable and safest choice, nonetheless their level of postmodern values held (Agatz et al., 2007).

Also, it should be considered that the new market players do not visibly aspire the implementation of any such channel strategies reinforced by the large amount of customers attracted by Amorelie and Eis.de, which solely operate online (Geißler, 2016), as well as the general trend for an increase of 15.2 % in the use of e-commerce among females observed in Germany from 2013 to 2016 (VuMA, n.d.; Appendix 16). Hence, the importance and necessity of investing in such a variety of distribution channels in this industry is debatable.

Additionally, the results confirm BU's decision to close down its catalogue ordering business in 2016 (Hoffmann, 2016). One might even question why it had been conducted up until then, given the very low preference rate found (1.8%). Nonetheless, while online channels are rated as highly attractive by the target group, the potential obstacles and risks from a brand's perspective should not be overlooked, as customer satisfaction and thus the level of perceived attractiveness and trustworthiness of a distribution channel, is highly dependent on the 'last mile' (Esper et al., 2003), i.e. the smooth operation of transportation and delivery.

In order to analyze the brand preferences (Q.16) in comparison to the preferred purchase channel (Q.14) crosstab analyses were conducted for each pairing, by means of re-coding the brand preference variable into two new populations, as well as the variable for the preferred

brand channel¹⁴. The residuals found show that there is a positive relationship present for all pairings, which were proven to be significant at a 95% confidence interval (Appendix 17).

Aspiring to improve the quality of these findings further, thus to review them in relation to the brand attribute '*distribution channels available*' influential for a purchase, each crosstab was layered with the additional newly re-coded variables for this part of Q.17, which reflect a population that rated this attribute as influential and one that did not¹⁵ (Appendix 18). As displayed in *table* 7 a positive relationship was, if also to a lesser degree, still evident after conducting the three-layered cross tab analyses, thus, for the population that considers the distribution channel to be important in respect to one's purchase decision. Also these results are significant at .05. Based on these findings, the following hypothesis is *accepted*:

Brand	Residual of the value (1) variables	
	2 layers	3 layers
Amorelie	36.8	16.9
Eis.de	6.7	1.6
BU	6.0	1.5
Orion	12.2	5.7

 H_3 : There is a positive relationship between the choice of brand and the consumer's perceived attractiveness of the distribution channels offered by that brand.

Table 7: Residuals of layered crosstab analyses; source: appendix 17 & 18

4.3.4. Answering of the research question

In respect to the guiding research question for this level "What are the key competitive drivers in the industry? How do the strategies pursued by the players in the market, in regard to segmentation and positioning, and distribution channel, respond to consumer needs?" based on the analysis and discussion above, it becomes evident that it is not easy to determine the main drivers of the industry based on the data collected, as the opinions and preferences among the target group varies greatly and seem to be highly dependent on individual brand preferences. Yet, based on the analysis conducted, both the distribution channels offered by a brand, price and the perceived clarity of the positioning, and the brand perception in general appear to be the factors through which the brands distinguish. Thus, it is assumed that these are currently the main competitive drivers of the erotic industry.

Moving on to the latter part of the question, the analysis has shown that, supported by the results of the question of brand preference (Q.16), it is proved that especially Amorelie's strategies in terms of distribution channel (solely online), segmentation (females, wide age group and resemblance with postmodern benefits, such as self-realization) and positioning

¹⁴ Re-coding of Likert-scale into two populations: 'strongly agree' & 'agree' assigned value (1); remaining responses assigned value (0)

¹⁵ Re-coding of Likert-scale into two populations: 'very likely' & 'likely' assigned value (1); remaining responses assigned value (0)

(benefit of quality and female focus) respond very well to the needs of the target group of this study. This is further supported by the rapid growth of the brand in terms of customer base and turnover (Möthe, 2015). Also, Eis.de seems to respond to the needs of its consumer's rather well, however, as analyzed above, the target group differs slightly from the one of this research, as the brand aspires to equally target men and women (Geißler, 2016). It should however be noted that Eis.de has a large customer base that is younger than 35 years old, thus the given the age quota for this research, the results are likely to be biased.

Further, Orion appears to currently pursue strategies that still respond to the needs of a 'sufficient' number of consumers to hold a solid position as a market-follower. Nonetheless, given the development in the society and the ongoing value shift, it is likely that the brand will be forced to adjust its strategies accordingly in the future, in order to avoid loosing market share.

Finally, BU, while pursuing a distribution channel strategy that does respond to consumers needs, the strategy appears to be rather inefficient, as the consumers that BU aspires to attract are satisfied by online channels alone already, as shown in this study. Regarding the segmentation and positioning approaches taken by the brand, it appears as if BU is still trying to serve everyone a little bit, but thereby, no distinct segmentation of the market can be conducted and the positioning becomes confusing for consumers. Further, the brand clearly struggles with its attempt to re-position itself in the market according to the newly emerged values of its target group (Dummer, 2015).

To summarize, it can be said that the erotic industry is a complex and rather 'tricky' industry given the psychological complexity of the subject matter of sexuality so fundamental to the industry. Hence, not just any basic segmentation or positioning strategy can be implemented here, as the purchase decisions made by consumers, their needs and the way those needs are expressed are much more multi-layered and less obvious, as for example when buying a book or clothing. Nevertheless, the new market entrants seems to have a better understanding of current consumer needs, thus provide a better fit of their strategies pursed and the consumer's needs. This is achieved through effective segmentation of the market and corresponding strategies that show those brands' ability to make tough decisions and trade offs for the greater value, i.e. operating solely online.

4.4. Macro level

The analysis and discussion of this level provided in the following is structured according to the literature review of the macro level.

4.4.1. Socio-cultural factors

In line with the argumentation presented in the literature review (*section 2.1.1*), Inglehart's theory based on the WVS is applied throughout this research, as this theory does not consider

one country as one homogenous unit, but takes the evolvement of cultural change over time into account (Inglehart 1997a; 1997b).

Considering the placement of the German society according to the results of the last wave (6th) of the WVS on Inglehart's and Welzel's cross-cultural map below (*Figure 6*), it becomes evident that postmodern values are held by the German society (WVS 6th wave, 2015). On the '*survival vs. self-expression*' dimension (x-axis), Germany is positioned at the rather lower end of the self-expression side of that continuum, indicating a moderate level of tolerance toward different believes, as well as security and trust prevailing within the society. Further, traditional gender roles are starting to get repealed, but are still in place and individual's aspiration of subjective well-being instead of materialistic goals is only somewhat socially accepted (Inglehart 1997a).



Figure 6: World Value Survey (WVS 6th wave, 2015)

While only moderately postmodern values are found on the first dimension, for the second dimension of '*traditional vs. secular-rational values*' (y-axis), Germany is positioned as one of the countries with the highest secular-rational values, which implies a very sufficient level of (economic) security felt within the society. Consequently, its members place less value on religion and traditional family values, have less respect toward authorities and pay only little attention to materialistic ideologies. Instead, value is placed on striving for equality and participation in decision-making (Inglehart & Baker, 2000).

In summary, Germany is considered a society that holds postmodern values; hence the focus on individual freedom is increased and a somewhat constant economic growth, thus an amplified feeling of security allows its members to focus on self-expression values (Inglehart, 1997a). This is aligned with the observation that higher-order needs are now merely the trigger of consumer's consumption, as discussed on the micro level (Maslow, 1954).

In order to evaluate the level of postmodern values held by the target group for this research four question for both dimensions were asked, as argued for in the 'questionnaire design' 3.4.1.3 (Q.6-13). The results of each of the questions was re-coded into a dummy variable¹⁶, by means of these newly recoded variables, an average level of postmodernism, much like an 'postmodernism index' was calculated for each of the 386 respondents (Appendix 25). The resulting total average is calculated to be 0.76. This was then put to a test of probabilities, where the H₁ is to be rejected if the total average of the 'postmodernism index' for all respondents is ≤ 0.5 .

Based on the total average being larger than 0.5, the following hypothesis is *accepted*:

 H_1 : Members of the established target group that show interest in the erotic industry are likely to hold postmodern values.

Consequently, given the rather high number found for the 'postmodernism index', it can be assumed that the degree of the postmodern values held by the population of this sample is above the average degree found for the total German society according to the WVS¹⁷ (6th wave, 2015). This is likely to be related to the sample living in urban areas, which are proven to first experience a shift or evolvement in values, as opposed to rural areas (Inglehart, 1997b).

In general, it is pertinent to note that the concern expressed by Schneider and Barsoux (2003) regarding a Western bias due to Western theorists behind most theories related to culture, is not considered damaging for this research, as the country in focus is clearly considered Western itself, thus the quality of the findings is assumed to not to be affected. However, while constituting a solid overview and insights on the socio-cultural level, Inglehart's theory and studies lack consideration of technological factors, which are acknowledged to become more and more important and powerful in nowadays' societies. Thus, to compensate that weakness and provide a holistic analysis of the macro level and the most relevant PEEST factors technological factors are discussed next.

¹⁶ Re-coding interval scale questions into two populations: responses rated \geq 7 assigned value (1); remaining responses assigned value (0)

Re-coding nominal data questions into two populations: favorable postmodern answers options assigned value (1); remaining answer options assigned value (0)

¹⁷ The actual conduct of such a comparison lies beyond the scope and resources of this research, but should be noted for future research.

4.4.2. Technological factors

Analyzing the impact of technological factors further on a macro level, thus impacting the entire erotic industry, the increased use of online shopping can be identified as a factor that is forcing market incumbents, such as BU and Orion, to re-organize their strategies, given the consumers' preference toward it, as identified earlier in this analysis (Q.15). Especially, the usage of smart phones for purchasing products in Germany has increased, namely by a 39.5 % increase in sales development in 2016 as opposed to the pervious year, thus this channel should be considered by brands in the industry (CRR, n.d; Appendix 22).

Further, consumers of all age groups and income levels are getting more and more used to technology, as it is omnipresent in a developed country such as Germany. Thereby enabling market entrants, e.g. Amorelie and Eis.de, to enter the industry with new business concepts, particularly in respect to distribution channels, as the erotic industry becomes more attractive, inter alia, due to lower entry barriers. The increased utilization of digital shopping possibilities, further allows brands to gain insight into the decision-making process of their consumers by means of next-real-time data, thereby opening up opportunities for tailor-made communication and other marketing activities that are likely to be a real 'game changer' in the entire industry (Michael & Miller, 2013). Yet, offline consumers should not be neglected by brands and complex IT solutions can come in costly for rather young brands, such as Amorelie (Koufaris, 2002; Wind & Bell, 2008).

Reviewing the means of the data gathered during this research for the respondents' extent of agreement that purchasing erotic products through the respective channels only carry a low risk (Q.15), disclose that the channel of 'online via PC' is by far perceived as the one with the lowest risk, followed by the 'online channel accessible via a mobile device'. The lowest extent of agreement to a perceived low risk has the 'catalogue/telephone channel'. The standard deviation revealed that opinions among the respondents of this study varied greatly for the 'channel of physical stores', thus are very subjective (Appendix 23).

To evaluate the impact this perception has on the overall channel preference (Q.14) among this sample population, a contingency table followed by a chi-square test of independence was conducted (Appendix 24), therefore, the respective variables were re-coded into dummy variables¹⁸. The results, as shown in *table 8*, are significant at a .05-level.

Based on the residual and the chi-square-value, it is revealed that while there is a relationship evident between the preferred channel of a consumer and the perceived degree of low risk, there is no proof that the channel with the lowest perceived risk is also the one preferred the most among the entire sample of this study. In fact the most preferred channel is 'online via PC', but the highest correlation between the variables is found for the channel of 'online via mobile'.

¹⁸ Re-coding of Likert-scale into two populations: 'strongly agree' & 'agree' assigned value (1); remaining responses assigned value (0)

Hence, the following hypothesis is rejected:

 H_2 : There is a positive relationship between the degree of low risk perceived and the distribution channel preferred by consumers.

Channel preferred	Residual of the value (1)	Pearson Chi-Square value
	variables	
Physical stores	23.1	29.853
Online via PC	11.5	24.820
Online via mobile	28.7	53.630
Catalogue / Phone order	4.9	27.901

Table 8: Residuals of contingency table & chi-square value; source: appendix 24

While a further investigation of the cause of the result above is not feasible within the scope of this research, it can be assumed that this implicates that the respective target group values subjective convenience in terms of the distribution channel chosen higher than initial concern regarding risk and data security issues when purchasing a product online.

4.4.3. Answering of the research question

In regard to the guiding research question "In what way has the socio-cultural development in the German society had an impact on the development of the erotic-industry and how have technological factors influenced that industry?" the analysis and discussion conducted above shows that in terms of technology a certain degree of influence is clearly present in the erotic industry, such as an increased use of online shopping. Nonetheless, these factors also influence any other B-2-C industry, thus should not be rated of exceptionally high influence, as, in fact, brands nowadays should already be prepared for these technological developments. Further, both market incumbents had an online store before the new players entered the market.

In terms of the threats underlying data security and the risk perceived by a consumer when purchasing online, both computer and mobile¹⁹, the data collected shows that the target group of the industry at hand, seems to be aware of the risks, but still is setting higher priorities on other aspects of its shopping experience. Thus, prefer online channels despite the possible risk (Gherab-Martin, 2010). This is considered especially interesting, as a data leak of an erotic brand's website might not only have economic consequences for the consumer, but also personal ones, such as reputation, despite a generally more open conception of sexuality. Yet, this preference might be reasoned due to the increased initial privacy of online shopping allowing to consumers to indulge and browse in a way that is likely to be considered embarrassing offline, which might be very relevant in the case of purchasing erotic products (Koufaris, 2002).

¹⁹ 58.3 % of German e-commerce users are concerned about risks regarding data security (Fittkau & Maaß Consulting, n.d.)

On the contrary, the level of influence the socio-cultural development in Germany has on the industry on a macro level has been demonstrated to be much higher, given the prevailing postmodern values held by the target group identified. This development is impacting shifts in consumer preferences, opening up new business opportunities for (niche) players serving needs of entirely new target groups, forcing existing brands to re-think their strategies due to the new approach individuals and society have taken on sexuality and women empowerment – in short; the socio-cultural development it is a complete 'game-changer'. The data shows that culture is indeed a gatekeeper to one's choices (Mathews, 2000), as well as supports Fang's (2005) notion that culture is ever changing, as it is influenced by factors that are both internal and external to an individual.

In summary it can be said that while technology clearly has influenced the development of the erotic industry in the way that it opened up more opportunities, both for consumers and brands, to purchase and go-to-market, the extent of that influence can be rated as rather moderate and is in no way considered disruptive.

However, the shift that has taken place in terms of socio-cultural factors, is much more profound and, as it appears, given the performance and reaction of long-term market incumbents, i.e. Orion and BU, appears to be rather unexpected. Therefore, it has and most likely will continue to influence the development of the erotic industry in such a comprehensive way that supports the conception that a cultural disruption has been happening in this industry, as opposed to the, by now almost usual, digital disruption.

5. Conclusion

This chapter comprises final remarks about the limitations of the study, the main findings and the resulting recommendations for the case study brand BU in respect to the overall problem statement of this thesis. Lastly, the study's applicability and future prospects are elaborated.

5.1. Limitations

Generally speaking, this thesis has been carried out without any prior knowledge about the erotic industry, further, only information publicly available about the industry and its players were utilized. In addition, as no financial means were granted for this research, restrictions in terms of access to costly external data and professional research platforms occurred. An option would have been to reach out to the brands in question, in order to gain more in-depth knowledge.

In relation to the questionnaire, despite the quota control question of shown interest/purchased an erotic product before (Q.5), the participants' prior knowledge of the erotic brands in focus was not tested. Such a test might have improved the quality of the research conducted, and further splits of the population would have been possible, e.g. compare the group of high brand-knowledge to that of low brand-knowledge.

Similarly, neither the participants' level of experimentation in relation to sexuality, or prior brand experience was inquired. Including this would have allowed testing the extent to which

prior knowledge and a certain 'level of expertise' within the product category affect brand perception and other attributes queried. However, despite the obstacle of great intimacy related to such questions, these aspects were not included, given that this research does not aspire to reveal any before/after comparison.

Consequently, given the scope of this research and the limitations it holds, the extent of the actual impact the aspects reviewed throughout this study have on the erotic industry, particularly on the performance of BU, cannot be fully determined. Nonetheless, the results obtained in this study do reveal the impact of socio-cultural factors on the general industry, as well as demonstrate how distribution channels, brand perceptions and positioning influence brand choices made.

5.2. Main findings

The aim of this thesis was to gain a better comprehension of the erotic industry in Germany, to determine the factors that have caused its disruption, and how this disruption has changed the industry in respect to market players and consumer behavior, especially with regard to BU as a brand. By means of establishing a case study of BU, the study sought to obtain the perspective of a practitioner, thus facilitate juxtaposition to theory.

In regard to the research questions and hypotheses guiding this thesis, the analytical findings made from the quantitative primary data collection through an online questionnaire, validate the hypothesis made at the *macro* level that the sample of this research is holding postmodern values (H_1), thus, given the representativeness of the study due to its sample size, it is concluded that postmodern values are predominant among the entire un-agitated group of female consumers within this industry. The results did not support the expectations that the degree of low risk perceived and distribution channel preferred is related for this target group (H_2). Hence, the impact of socio-cultural factors on the industry is larger than that of technological ones.

At the *meso* level, the data validated the hypothesis that choice of brand and perceived attractiveness of the distribution channels offered by that brand are positively related (H_3), thereby emphasizing the importance of the right choice of distribution channels for brands in the market. It was further demonstrated that in general online channels are preferred by far by the sample, thus this is assumed to be the general perception among the market's female consumers. Further, the data showed how crucial a clear brand positioning is for consumers when making a purchase decisions (H_4). However, it was revealed that being clearly positioned in the consumers' minds is not automatically a good thing, as shown for the case of BU, which is still perceived as very masculine, according to its positioning and brand image several years ago. Thus, this former strong positioning is now hindering BU to credibly match the newly evolved postmodern image of women held by the target group, while Eis.de and Amorelie were able to position themselves both clear and relevant in the minds of these consumers.

Lastly, at the *mirco* level, the results support the conclusions drawn from the other levels, as it is demonstrated that the perceived degree of masculinity of a brand is related to the choice of female consumers to not buy that brand, i.e. the more masculine the brand, the less likely a purchase (H_5). The data showed BU to be perceived most masculine, while simultaneously least preferred brand among the sample (3.9%), hence it can be concluded that this unfavorable brand perception, which yet is so distinctly engraved in the minds of female consumers, is clearly related to the current failure of BU in the German erotic market.

Moving on to the overall problem statement "How should Beate Uhse position itself in the German erotic-industry in order to respond to changing consumer needs and (evolving) competitor activities?" in light of the insight gained from both primary and secondary data sources, there is doubt to whether BU as the brand it currently presents, is at this point even able to change its perceived positioning and brand image profoundly enough to appear credible to female consumers, and achieve and sustain a competitive advantage. Hence, this tendency, as already been indicated in the introduction section 1.2, has been confirmed by this study's research.

The combination of a former very masculine positioning, poorly implemented re-branding activities, internal instability and mismanaging, and various shifts in the strategic direction of the brand that were then not followed through, had a destructive effect on brand equity and perception of BU. Further, the brand wasted precious time on these various shifts, thereby fell more and more back in its catch up race with the Eis.de and Amorelie.

Therefore, to be able to turn things around at this stage, BU would have to invest large sums into a coherent, relevant, and well-implemented re-branding strategy. However, amid the financial problems the organization is facing (Beate Uhse AG, 2015), this is not considered feasible for the brand, as also success cannot be guaranteed, thus any negative alterations in the expected return of such an investment could mean bankruptcy.

Yet, remaining on the current course, will most likely also eventually lead to bankruptcy of the brand. Hence, the broad answer to the problem statement is that for BU to still remain in the game, a new sub-brand with a compelling concept that meets the needs of postmodern consumers should be launched and branded in a convincing way that leaves no room for consumers associating the new sub-brand with the old masculine image of BU. Implying that the sub-brand is held entirely detached from its mother brand BU.

A more detailed answer to the problem statement and further recommendations are outlined in the next section.

5.3. Recommendations for Beate Uhse

Based on the results of the analysis and the positioning maps developed, the sub-brand of BU should be positioned in a way that responds to the new image of women held by the desired target group, as this market is not yet saturated and still growing, thus offering promising business prospects (Wirtschafts Woche, 2015).

Structuring further recommendations according to the '4 P's of Marketing', in terms of *product* women's higher aesthetical aptitude must be considered in regard to the product portfolio offered to win this demanding group of consumers for the brand. Especially, for the design of love toys the typical image of phallus is outdated, instead designs that can hardly be identified as a love toys, but resemble more a Bang & Olufson telephone, are demanded by female consumers. Thereby truly transforming sex toys into a lifestyle product (Möthe, 2015). Further, additional information and consultancy in terms of all the products offered and trends and tips should be provided, as this is supports the ongoing evolvement toward more open handling of sexuality. However, for the sub-brand's product portfolio it should be considered that by now also Amazon and drug stores (e.g. 'dm') offer sex toys, while lingerie is also available at Galeria Kaufhof (middle to high end) or even H&M (low-end). Thus, the service provided by the brand becomes the crucial factor of added value distinguishing it from other players.

In terms of *price*, since the financial situation and future strategic intends planned by BU cannot be known for certain by the researcher of this study, the sub-brand should either attack Amorelie at the high quality, thus rather high-end price level, to attract a share of their customers. Another option would be a full commitment to a cost-leadership strategy, thus close to Eis.de's price level, to alienate price-sensitive customers of Amorelie by convincing them with similar service standards and product quality. Additionally, potential customers are likely to be more willing to make a first purchase at a lower cost (Kotler et al., 2012).

In general, given its long existence and international operations, BU has the means and the infrastructure to benefit from economies of scope, i.e. drawing from existing services to launch the online store for the sub-brand, and has further the possibility to roll out that sub-brand to other countries. Thus, BU holds capabilities that cannot be easily acquired by recent market entrants; hence it gives BU, thus the sub-brand, a competitive advantage, if utilized effectively.

Considering *promotion* in its broader sense, the sub-brand should communicate coherently across all channels and activities used that sex toys are not seen as the object of satisfaction, but more as an appropriate means to it that should fit women's lifestyle. Further, the sub-brand should distinctively refrain from any activities that imply women to be the object of sex, as done previously in the erotic industry, as instead lust and satisfaction is what women have as an objective during sex and self-pleasure, amid the shift toward more self-realization and empowerment of women in the society (WVS 6th wave, 2015).

Lastly, in respect to *place*, given the results in the analysis, a distribution channel strategy solely consisting of online channels is advised, thereby responding to consumer needs, while also keeping costs low, thus remaining more competitive toward other players. Yet, given the increasing comfortableness women have in openly addressing topics of sexuality and satisfaction, occasional pop-up events and stores are suggested, allowing for a physical encounter with these tangible high-involvement products. Also, such events provide possibilities for partnerships with blogger and other influencers, which fit the target group.

In conclusion, by launching a sub-brand BU circumvents the problem of not being able to close the gap between intended and perceived positioning, despite efforts like the new logo. In fact, the sub-brand, if kept publically detached from BU, has a 'clean slate', which provides a solid foundation for building a new brand that reflects the postmodern image of women as held by the majority of female postmodern consumers in Germany. Further, is able to keep up, and hopefully overtake new market players in terms of market share and turnover through cutting unnecessary fixed-costs, e.g. brick and mortar stores. Instead, the sub-brand should match the needs actually prioritized by this target group, e.g. not the level of perceived risk of a distribution channel, thus are relevant to a group homogenous not only on a macro level, but also on a behavioral level. Moreover, a focus on female consumer is advised given the unsaturation of this market segment for the product category and the great impact women have in the purchase decision for an erotic product in relationships, amid their overall increased empowerment, as also shown in this study (Dummer, 2015).

5.4. Future prospects

In terms of the applicability of this thesis, implications can be drawn to other industries from the leanings and key findings of this study in the sense that a constant scan of the environment should not be limited to possible technological changes, but also consumer values and the resulting needs should be monitored by brands to avoid 'marketing myopia' (Levitt, 2004).

The results of this thesis can to a certain extent be applied to other product categories also highly related to the values, thus attitudes of its consumers, such as the men's personal care industry, where a shift in perception toward men taking care of their skin, hair and beard has opened up an entirely new target group (Fury, 216).

Moreover, the thesis has contributed to a better understanding of how deeply socio-cultural values can impact an industry, already on an intra-national level, thus stressed its importance in direct correlation to disruption and resulting challenges faced market players, as it has not been done previously. Thereby, adding a marketing layer to cultural theories (Inglehart, 1997a; 1997b; Schwartz, 2012; Fang, 2005) and providing a more obvious linkage by adding complementing knowledge to both research areas.

In general, the data collected for this thesis was very extensive and eventually held too much information to all be addressed and analyzed within the scope of this research, resulting in some data being disregarded for the analysis without necessarily being irrelevant to the topic, e.g. innovation level. Thus, this additional data collected already provides a solid foundation for further extensive research in this topic, perhaps to be done in form of a PhD.

Further, investigating additional relationships between the different attributes identified as influential for a purchase decision could reveal valuable and interesting insights, as well as adds greater validity.

Other areas of research could be to investigate the impact that each brand's communication and advertisement has on the perception of the brand, in respect to the channel, style and frequency, as well as overall the brands' choices made in terms of the entire Integrated Marketing Communications mix, as suggested by Pickton & Broderick (2005). Further, the impact of web shop and product design on brand perception and choice would reveal interesting insights, especially given the shown preference of online channels and women's higher aesthetical aptitude (Möthe, 2015).

Moreover, the intricate structure of this study offers diverse opportunities for including additional theories, such as how personal experiences play into brand choices and perception, amid sexuality being such a psychologically complex topic (McCarthy & Bodnar, 2005). Results would likely be very detailed, thus particularly interesting for an internationally operating brand like BU. By taking research to an inter-national level, differences and resemblances between societies and the way cultural influences are tied to the respective variables of the study could be discovered. Such knowledge could be beneficial for revealing untapped potential in local markets ahead of competitors and planning marketing strategies accordingly. Thereby being able to act proactively instead of reactively in other erotic markets that are likely to undergo a shift in cultural values (Inglehart 1997a), thus tapping the full potential of a cultural disruption.

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7. Appendix

Appendix 1: Detailed description of competitors

Orion

Orion was founded in 1981 in Flensburg, Germany, based on the outsourcing of the two business units publishing house and the mail-order business from the company Beate Uhse itself. As a consequence, the family business, called "Versandhaus Beate Uhse", was divided between the two sons of Beate Uhse, as well as the spouses Dirk Rotermund and Beate Uhse-Rotermund; Beate Uhse and her son Ulrich stayed together to run the business of the stores and cinemas owned by Versandhaus Beate Uhse, while her husband Klaus and the second son Dirk, took over the other half of the business and re-named it ORION in 1985. By contract the two companies were only allowed to compete in the same business areas five years after the division, thus from 1986 on (Orion, 2016).

ORION started off a fierce attack by establishing a store chain comprising 20 stores by 1987; by 2013 the number grew to 150 within Germany alone. In the same year, ORION expanded its business into other German-speaking countries, namely Switzerland and Austria. After the fall of the wall in 1989, ORION was able to reach the entire German market and became know as the first erotic brand to offer sex-toys that have German language on pack in 1993 (Orion, 2016).

Already in the year 1995, ORION launched its first online store, thereby become one of the pioneers in e-commerce in Germany. By 2003, the online store included a B-2-B section, where wholesalers were also able to order the newest trends in the erotic industry (Orion, 2016).

The company grew steadily throughout the years, while its headquarter, warehouse and logistics centrum remained in Flensburg. In addition, the business is still family-owned and run, and in 2014 Dirk Rotermund's daughter took over the management of the company.

Orion's online shop has been awarded several times, both for the best B-2-B and B-2-C online shop within the German erotic industry. However, in 2016 Orion only made second place behind the online store of Eis.de (Deutsches Institut für Service - Qualität, 2016). In 2015 for the first time, Orion used the medium of radio to advertise its products all across Germany (Orion, 2016). The company employed approximately 1000 employees in 2015 (Wirtschafts Woche, 2015).

1. <u>Eis.de</u>

Eis.de was founded in 2006 in Bielefeld, Germany and the name of the brand entails the approach it has, namely reaching its consumers via an online store - and via an online store only. The brand entered the erotic industry with a radical new approach; the focus of eis.de is mainly placed on value-for-money and the brand takes a rather playful and imaginative angle towards the product category, which is clearly reflected in the communication styles used (Möthe, 2015). The company has currently 270 employees (Geißler, 2016) and offers a product portfolio of approximately 25000 products

According to the company's own information, grew its consumer base from one M in 2007 to 6,5 M by the end of 2015 and 70 % of that consumer base are female. Further, the consumers are of, for this industry, exceptionally young age, as half of them are below 35 years old. The attractiveness of eis.de among this young age group could be related to its general price-sensitivity (Geißler, 2016).

Eis.de knows how to target this group of consumers, by engaging the well-known German advertising agency 'Jung van Matt' for its TV commercials, which play humorous with conventional clichés about sexuality and the German society, thereby generating a high reach and share rate on various social media platforms. According to the brand, its objective is to stay with the 'pulse of time; and thereby create further benchmarks in the industry that stand in stark contrast to what long-standing market players, such as Orion and Beate Uhse, currently construct (Möthe, 2015).

2. <u>Amorelie</u>

Amorelie is a start-up that was founded in Berlin, Germany, in 2013 with the mission to revolutionize the erotic-industry in Germany and shake off the filthy image that the industry still has in society according to several surveys (Geißler, 2016). Rather than having the start-up be associated solely with sexuality, the female founder of Amorelie Carmer emphasizes that her start-up is rooted somewhere between lifestyle and beauty industry, as she sees Amorelie as a platform for "everything that is intimate, sensual and physical" given that "sexuality is not perceived as the outstanding element, but rather as a completely normal element of one's life" ("Amorelie und Co.", 2016). Further, Amorelie publicly claims to offer more high quality products than the low price-focused competitor Eis.de does (Hoffmann, 2016).

The main target group of Amorelie, which only operates online, is mainly women and couples between the age of 25 and 54. Thereby, focusing on a group that, according to Carmer "*has been forgotten by current erotic brands and retailers*" ("Amorelie und Co.", 2016).

While the brand does not publicly announce any numbers on the exact amount of customers, it does provide data, which states that 70 % of its customers are female. Further, the turnover of the brand is estimated to be in the double-digits million Euro range after only four years in the business ("Amorelie und Co.", 2016) and the turnover has increased by ten times from 2013 to 2014, according to Carmer (Möthe, 2015).

The company has currently a total of 71 employees and has, according to BrandIndex 2016, the most satisfied customers within the industry (Geißler, 2016).

Besides its country of origin, Amorelie is now present in Austria, Switzerland, Belgium and France and plans to expand its business further. Additionally, the brand tries to attract more customers offline, by means of pop-up stores activities that take place for a limited time period in bigger cities in the countries of operation (Dummer, 2015).

Appendix 2: Karahanna et al. (2005) model of '*Culture's Influence on Behaviour'*.



Appendix 3: Screenshot result from Best4planning (Source: Best4planning.de)



Zielgruppe 1: Geschlecht - weiblich- Potenzial: 385 Fälle, 0,89 Mio., 1,27%



Appendix 4: 'Facebook' is the social media platform that is used the most by the defined target group (ARD & ZDF, 2017)

Appendix 5: List of Facebook groups used to distribute survey

Berlin: Sharing is Caring – Berlin, Wohnung und WG Berlin , Singles Berlin
Koeln: Jobs in Koeln!, Neu in Koeln, Wohnungssuche Koeln
Stuttgart: Fair-Teiler Stuttgart, Stuttgart for Free, Flohmarkt Stuttgart
Nuernberg: Nuernberg Inserate/ Kleinanzeigen, Nuernberg verschenkt, Singles Nuernberg u.
Umgebung
Muenchen: Muenchen verschenkt, WG & Wohnung Muenchen gesucht, Singles Muenchen
Duesseldorf: Neu in Duesseldorf, Nett-Werk Duesseldorf , Flohmarkt Duesseldorf
Frankfurt: An und Verkauf / Frankfurt am Main, WG & Wohnung Frankfurt am Main
Bremen: Flohmarkt Bremen, Neu in Bremen, Jobsuche Bremen
Leipzig: Flohmarkt Leipzig, Leipzig Singles, Singles in Leipzig u. Umgebung
Dresden: Neu in Dresden , Flohmarkt Dresden, Jobs in Dresden
Hamburg: Neu in Hamburg, Jobs in Hamburg, WG & Wohnung gesucht Hamburg
Dortmund: Schwarzes Brett Dortmund, Dortmund Kleinanzeigen, Jobs in Dortmund
Hannover: WG & Wohnungen Hannover, Flohmarkt Hannover, Neu in Hannover



Appendix 6: World-Value-Survey Cross-Cultural Map (WVS 6th wave, 2015)

Appendix 7: Complete answers of questionnaire conducted

Master's Thesis

Seite 1, Frage 1: Ihr Geschlecht? (Pflichtfrage)

386 Teilnehmer

Männlich	-
Weiblich	386
Sonstige	-

Seite 1, Frage 2: Ihr Alter? (Pflichtfrage)

 386 Teilnehmer

 24 und jünger

 25-34
 182

 35-44
 123

 45-54
 81

 55 und älter

Seite 1, Frage 3: Ihr Wohnsitz? (Pflichtfrage)

47
40
24
24
20
23
46
33
28
31
23
23
24
-

Seite 1, Frage 4: Ihr höchster Bildungsabschluss? (Pflichtfrage)

386 Teilnehmer

Hauptschulabschluss/ Berufsbildungsreife	14
Mittlere Reife	73
Abitur	91
Bachelor	100
Master / Diplom / M.B.A.	100
Doktor	8

Seite 1, Frage 5: Haben Sie sich schon mal über Erotikartikel im Internet informiert / Erotikartikel im Internet gekauft? (Pflichtfrage)

386 Teilnehmer									
Ja	386								
Nein	-								

Seite 2, Frage 6: Wie ist Ihre Einstellung zum Thema Religion? (Pflichtfrage)

386 Teilnehmer

Ich bin eine religiöse Person	33
Ich bin keine religiöse Person	275
Ich bin überzeugter Atheist	78

Seite 2, Frage 7: In welchem Maße halten Sie Abtreibung für gerechtfertigt? (Pflichtfrage) 386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
In keinem Maße gerechtfertigt	4	5	13	3	17	14	26	58	186	60	8,17 (3154 / 386 Antworten)

Seite 2, Frage 8: In welchem Maße halten Sie Homosexualität für gerechtfertigt? (Pflichtfrage) 386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
In keinem Maße gerechtfertigt	2	1	0	0	1	0	1	7	29	345	9,80 (3783 / 386 Antworten)

Seite 2, Frage 9: Wie interessiert sind Sie an Politik/politischen Themen? (Pflichtfrage) 386 Teilnehmer

Ich bin aktiv in der Politik tätig	41
Ich bin politisch interessiert, aber nicht selbst politisch aktiv	240
Mein Interesse an Politik ist nicht größer als an anderen Themen	90
Ich bin an Politik nicht interessiert	15

Seite 2, Frage 10: Können Frauen nur durch Kinder wirklich ein erfülltes Leben führen? (Pflichtfrage) 386 Teilnehmer

Ja, sie brauchen Kinder dazu	15
Nein, sie können auch ohne Kinder ein erfülltes Leben führen	371

Seite 2, Frage 11: Welcher der folgenden Aussagen stimmen Sie am Meisten zu? (Pflichtfrage)

386 Teilnehmer

Man kann Menschen vertrauen.	289
Man kann nicht vorsichtig genug sein.	97

Seite 2, Frage 12: Haben Sie aktuell das Gefühl von ökonomischer Sicherheit in ihrem Leben? (Pflichtfrage) 386 Teilnehmer

	1	2	m	4	5	6	7	8	9	10	Durchschnitt
Nein, ich fühle mich nicht sicher	5	13	25	24	22	24	60	126	76	11	6,94 (2678 / 386 Antworten)

Seite 2, Frage 13: Wie ist Ihre Einstellung in Bezug auf Umweltschutz? (Pflichtfrage)

386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
Unwichtig	1	1	1	2	5	10	26	62	117	161	8,91 (3440 / 386 Antworten)

Seite 3, Frage 14: Über welche Distributionskanäle kaufen Sie aktuell bzw. würden Sie gerne Erotikprodukte kaufen? (Pflichtfrage)

386 Teilnehmer

Stationäre Geschäfte	124
Online Shops, die ich mit dem PC oder Laptop aufrufen kann	354
Online Shops, die ich mit dem Smartphone aufrufen kann	290
Kataloge /Telefonische Bestellungen	7

Seite 3, Frage 15: Inwieweit würden Sie in Bezug auf die verschiedenen Kanäle zustimmen, dass der Kauf

von Erotikprodukten mit geringem Risiko verbunden ist? (Pflichtfrage)

386 Teilnehmer

	Überhaupt keine Zustimmung	Keine Zustimmung	weder Zustimmung noch Ablehnung	Zustimmung	Hohe Zustimmung
Stationäre Geschäfte	42	175	51	59	59
Online Shops, die ich mit dem PC oder Laptop aufrufen kann	5	17	69	146	149
Online Shops, die ich mit dem Smartphone aufrufen kann	10	26	82	191	77
Kataloge /Telefonische Bestellungen	34	199	95	42	16

Seite 3, Frage 16: Welche Marke bevorzugen Sie aktuell/würden Sie wählen, um ein Erotikprodukt zu kaufen? (Pflichtfrage)

386	lei	Ine	hm	er

Amorelie	214	
Eis.de	90	
Beate Uhse	15	
Orion	47	
Andere (bitte nennen Sie diese)	20	 Fun Factory (4 x) dildofee (3 x) Amazon (2 x) Fünf factory keine Bevorzugung Produkt und Preisgebundene Wahl playstixx Keine Ahnung - ab jetzt alle folgenden Fragen -9 Boutique bizarre biwie, funfactory keine spezifische Marke egal. Das Produkt soll nachweislich(durch Test) frei von gesundheitsschädliche Substanzen sein Keine. Ich habe mich zwar informiert, doch nie gekauft. Rossmann

Seite 3, Frage 17: Wie wahrscheinlich ist es, dass folgende Kriterien Ihre Markenwahl beim Kauf von Erotikprodukten beeinflussen? (Pflichtfrage) 386 Teilnehmer

	Sehr unwahrscheinlich	Unwahrscheinlich	Weder wahrscheinlich noch unwahrscheinlich	Wahrscheinlich	Sehr wahrscheinlich
Markenwahrnehmung	20	41	40	237	48
Markenpositionierung	23	45	43	121	154
Verfügbare Distributionskanäle	12	27	52	220	75
Innovationsgrad	26	168	92	77	23
Preis	6	29	45	238	68
Der gewähleistete Grad an Anonymität während des Kaufes	24	26	46	214	76

Seite 3, Frage 18: Wie würden Sie den allgemeinen Innovationsgrad der folgenden Marken beurteilen?

(Pflichtfrage) 386 Teilnehmer

	Sehr gering	Gering	Weder hoch noch gering	Hoch	Sehr hoch
Amorelie	4	4	70	231	77
Eis.de	2	3	86	242	53
Beate Uhse	162	67	118	34	5
Orion	53	180	120	28	5

Seite 3, Frage 19: Inwieweit stimmen Sie zu, dass die angebotenen Distributionskanäle der folgenden Marken für Sie attraktiv sind? (Pflichtfrage)

386 Teilnehmer

	Überhaupt keine Zustimmung	Keine Zustimmung	weder Zustimmung noch Ablehnung	Zustimmung	Hohe Zustimmung
Amorelie	6	11	62	145	162
Eis.de	6	10	60	152	158
Beate Uhse	139	103	92	44	8
Orion	24	217	97	40	8

Seite 3, Frage 20: Inwieweit stimmen Sie zu, dass eine klare Markenpositionierung einen positiven Einfluss auf Ihre Markenwahl hat? (Pflichtfrage)

386 Teilnehmer

Überhaupt keine Zustimmung							
Keine Zustimmung	26						
weder Zustimmung noch Ablehnung	55						
Zustimmung	141						
Hohe Zustimmung	145						

Seite 3, Frage 21: Bitte bewerten Sie die folgenden Marken in Bezug auf die Eindeutigkeit ihrer Markenpositionierung innerhalb der Erotikindustrie. (Pflichtfrage)

386 Teilnehmer

	Überhaupt nicht eindeutig	Nicht eindeutig	weder eindeutig noch nicht eindeutig	Eindeutig	Sehr eindeutig
Amorelie	3	12	65	105	201
Eis.de	35	163	83	65	40
Beate Uhse	5	10	65	131	175
Orion	39	166	86	41	54

Seite 3, Frage 22: Bitte bewerten Sie die jeweiligen Marken in Bezug auf folgenden Kriterien. (Pflichtfrage) Amorelie

386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
Männlich orientiert	0	0	2	1	28	38	24	27	167	99	8,43 (3255 / 386 Antworten)
Langweilig	4	2	1	4	31	34	39	102	135	34	7,85 (3030 / 386 Antworten)
Unangenehm	3	1	3	2	22	32	23	39	140	121	8,46 (3267 / 386 Antworten)

Seite 3: (Pflichtfrage)

Eis.de

386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
Männlich orientiert	0	2	12	48	112	70	65	49	12	16	6,03 (2327 / 386 Antworten)

Langweilig	3	3	10	33	72	72	79	69	28	17	6,45 (2490 / 386 Antworten)
Unangenehm	3	17	34	64	80	42	51	39	34	22	5,81 (2242 / 386 Antworten)

Seite 3: (Pflichtfrage) Beate Uhse

386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
Männlich orientiert	66	139	36	19	43	42	16	11	5	9	3,45 (1330 / 386 Antworten)
Langweilig	48	121	66	22	48	37	15	17	4	8	3,61 (1395 / 386 Antworten)
Unangenehm	58	97	64	21	46	44	22	13	11	10	3,83 (1479 / 386 Antworten)

Seite 3: (Pflichtfrage) Orion

386 Teilnehmer

	1	2	3	4	5	6	7	8	9	10	Durchschnitt
Männlich orientiert	16	23	35	86	133	63	12	9	4	5	4,65 (1796 / 386 Antworten)
Langweilig	17	33	84	76	83	46	20	17	5	5	4,41 (1701 / 386 Antworten)
Unangenehm	15	20	41	83	78	81	36	16	9	7	4,97 (1917 / 386 Antworten)

Appendix 8: SPSS results: crosstab City*brand preference signfi

DATASET ACTIVATE DataSet1.
SAVE OUTFILE='/Users/laura/Desktop/final variable name backup .sav /COMPRESSED
CROSSTABS
/TABLES=Brand_preference_optionsBY Live
/FORMAT=AVALUE TABLES
/STATISTICS=CHISQ PHI
/CELLS=COUNT COLUMN
/COUNT ROUND CELL.

Crosstabs

Output Created 18-JUL-2017 13:48:45 Comments ///sers/laura/Desktop/final variable name backup.sav Input Data ///sers/laura/Desktop/final variable name backup.sav Active Dataset DataSet1 Filter <none> Weight <none> Split File <none> N of Rows in Working 386 Missing Value Handling Definition of Missing User-defined missing values are treated as missing. Cases Used Statistics for each table are based on all the cases with valid data in the specifier ange(s) for all variables in each table. Syntax CROSSTABS Resources Processor Time 00:00:00,04 Elapsed Time 00:00:00,00</none></none></none>		Notes	
Comments Jata /Users/laura/Desktop/fi nal variable name backup.sav Active Dataset DataSet1 Filter <none> Weight <none> Split File <none> N of Rows in Working Data File 386 Missing Value Handling Definition of Missing User-defined missing values are treated as missing value save treated as missing values are based on all the cases with valid data in the specified range(s) for all variables in each table. Syntax CROSSTABS Freesources Processor Time 0:0:0:00,04 Elapsed Time 00:00:00,00 0:0:0:00,04</none></none></none>	Output Created		18-JUL-2017 13:48:45
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N of Rows in Working Data File386Missing Value Handling Cases UsedDefinition of Missing values are treated as missing.User-defined missing values are treated as missing.Cases UsedStatistics for each table are based on all the cases with valid data in the specified range(s) for all variables in each table.SyntaxCROSSTABS /TABLES=Brand_prefere rce_options BY Live /FORMAT=AVALUE TABLES /STATISTICS=CHISQ PHI /CELLS=COUNT COUNT ROUND CELL.ResourcesProcessor Time Elapsed Time00:00:00,04		Split File	<none></none>
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Cases UsedStatistics for each table are based on all the cases with valid data in the specified range(s) for all variables in each 	Missing Value Handling	Definition of Missing	User-defined missing values are treated as missing.
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Processor Time 00:00:00,04 Elapsed Time 00:00:00,00	Syntax		CROSSTABS /TABLES=Brand_prefere nce_options BY Live /FORMAT=AVALUE TABLES /STATISTICS=CHISQ PHI /CELLS=COUNT COLUMN /COUNT ROUND CELL.
Elapsed Time 00:00:00,00	Resources	Processor Time	00:00:00,04
		Elapsed Time	00:00:00,00
Dimensions Requested 2		Dimensions Requested	2
Cells Available 524245		Cells Available	524245

[DataSet1] /Users/laura/Desktop/final variable name backup .sav

	Cases								
	Va	lid	Mis	sing	Total				
	N	Percent	Ν	Percent	Ν	Percent			
Brand_preference_option s * Live	386	100,0%	0	0,0%	386	100,0%			

Case Processing Summary

Brand_preference_options * Live Crosstabulation

				Live		
			Berlin	Bremen	Cologne	
Brand_preference_option	Amorelie	Count	15	12	17	
S		% within Live	31,9%	30,0%	70,8%	
	Eis.de	Count	15	16	6	
		% within Live	31,9%	40,0%	25,0%	
	Beate Uhse	Count	5	0	0	
		% within Live	10,6%	0,0%	0,0%	
	Orion	Count	6	9	1	
		% within Live	12,8%	22,5%	4,2%	
	others	Count	6	3	0	
		% within Live	12,8%	7,5%	0,0%	
Total		Count	47	40	24	
		% within Live	100,0%	100,0%	100,0%	ĺ

Brand_preference_options * Live Crosstabulation

				Live	
			Dresden	Dortmund	duesseldorf
Brand_preference_option	Amorelie	Count	18	16	18
S		% within Live	75,0%	80,0%	78,3%
	Eis.de	Count	3	2	1
		% within Live	12,5%	10,0%	4,3%
	Beate Uhse	Count	0	1	1
		% within Live	0,0%	5,0%	4,3%
	Orion	Count	2	1	3
		% within Live	8,3%	5,0%	13,0%
	others	Count	1	0	0
		% within Live	4,2%	0,0%	0,0%
Total		Count	24	20	23
		% within Live	100,0%	100,0%	100,0%

				Live	
			Frankfurt	Hamburg	Hanover
Brand_preference_option	Amorelie	Count	19	22	15
S		% within Live	41,3%	66,7%	53,6%
	Eis.de	Count	18	7	5
		% within Live	39,1%	21,2%	17,9%
	Beate Uhse	Count	0	1	0
		% within Live	0,0%	3,0%	0,0%
	Orion	Count	7	3	6
		% within Live	15,2%	9,1%	21,4%
	others	Count	2	0	2
		% within Live	4,3%	0,0%	7,1%
Total		Count	46	33	28
		% within Live	100,0%	100,0%	100,0%

Brand_preference_options * Live Crosstabulation

Brand_preference	_options '	* Live	Crosstabulation
------------------	------------	--------	-----------------

				Live	
			leipzig	Munich	Nuernberg
Brand_preference_option	Amorelie	Count	17	16	17
S		% within Live	54,8%	69,6%	73,9%
	Eis.de	Count	6	2	5
		% within Live	19,4%	8,7%	21,7%
	Beate Uhse	Count	3	0	0
		% within Live	9,7%	0,0%	0,0%
	Orion	Count	2	4	1
		% within Live	6,5%	17,4%	4,3%
	others	Count	3	1	0
		% within Live	9,7%	4,3%	0,0%
Total		Count	31	23	23
		% within Live	100,0%	100,0%	100,0%

			Live	
			Stuttgart	Total
Brand_preference_option	Amorelie	Count	12	214
S		% within Live	50,0%	55,4%
	Eis.de	Count	4	90
		% within Live	16,7%	23,3%
	Beate Uhse	Count	4	15
		% within Live	16,7%	3,9%
	Orion	Count	2	47
		% within Live	8,3%	12,2%
	others	Count	2	20
		% within Live	8,3%	5,2%
Total		Count	24	386
		% within Live	100,0%	100,0%

Brand_preference_options * Live Crosstabulation

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	93,727 ^a	48	,000
Likelihood Ratio	101,649	48	,000
Linear-by-Linear Association	3,845	1	,050
N of Valid Cases	386		

a. 38 cells (58,5%) have expected count less than 5. The minimum expected count is ,78.

Symmetric Measures

		Value	Approximate Significance
Nominal by Nominal	Phi	,493	,000
	Cramer's V	,246	,000
N of Valid Cases		386	

Appendix 9: SPSS results: Compared means – Attributes of Influence

DESCRIPTIVES VARIABLES=Influence_brandperception Influence_brandpositioning Influence _distribution Influence_innovation Influence_price Influence_anonymity

/SAVE

/STATISTICS=MEAN STDDEV VARIANCE MIN MAX.

Descriptives

Std. Deviation Ν Minimum Maximum Mean Variance Influence_brandpercepti 1,001 386 1 5 1,001 3,65 on Influence_brandpositioni 386 1 5 3,88 1,225 1,501 ng Inlfuence_distribution 386 1 5 3,83 ,928 ,861 1 5 2.75 1.082 Influence_innovation 386 1.040 5 1 3,86 ,716 Influence_price 386 ,846 Influence_anonymity 386 1 5 3,76 1,043 1,089 Valid N (listwise) 386

Descriptive Statistics

Appendix 10: SPSS results: Descriptive statistics – Innovation per brand

DESCRIPTIVES VARIABLES=Innovation_amorelie Innovation_eis Innovation_BU Innovation_orion /STATISTICS=MEAN STDDEV VARIANCE MIN MAX.

Descriptives

	N	Minimum	Maximum	Mean	Std. Deviation	Variance
Innovation_amorelie	386	1	5	3,97	,718	,516
Innovation_eis	386	1	5	3,88	,652	,425
Innovation_BU	386	1	5	2,10	1,090	1,187
Innovation_orion	386	1	5	2,36	,854	,729
Valid N (listwise)	386					

Descriptive Statistics

Appendix 11: SPSS results: Attributes likely to influence purchase (mean values)

		Sum of Squares	df	Mean Square	F	Sig.
Influence_brandpercepti on	Between Groups	53,459	4	13,365	15,336	,000
	Within Groups	332,023	381	,871		
	Total	385,482	385			
Influence_brandpositioni	Between Groups	150,178	4	37,545	33,433	,000
ng	Within Groups	427,853	381	1,123		
	Total	578,031	385			
Inlfuence_distribution	Between Groups	38,743	4	9,686	12,611	,000
	Within Groups	292,628	381	,768		
	Total	331,370	385			
Influence_innovation	Between Groups	38,201	4	9,550	9,615	,000
	Within Groups	378,424	381	,993		
	Total	416,624	385			
Influence_price	Between Groups	15,332	4	3,833	5,609	,000
	Within Groups	260,390	381	,683		
	Total	275,723	385			
Influence_anonymity	Between Groups	20,141	4	5,035	4,808	,001
	Within Groups	398,968	381	1,047		
	Total	419,109	385			

ANOVA

ONEWAY Influence_brandperception Influence_brandpositioning Inlfuence_distribution Influence_innovation Influence_price Influence_anonymity BY Brand_preference_options /STATISTICS DESCRIPTIVES HOMOGENEITY BROWNFORSYTHE WELCH /PLOT MEANS /MISSING ANALYSIS /POSTHOC=LSD ALPHA(0.05).

Oneway

Þ

Descriptives

				Std		95% Confiden Me	ce Interval for an		
		N	Mean	Deviation	Std. Error	Lower Bound	Upper Bound	Minimum	Maximum
Influence_brandpercepti	Amorelie	214	3,96	,680	,047	3,87	4,05	1	5
on	Eis.de	90	3,40	1,216	,128	3,15	3,65	1	5
	Beate Uhse	15	2,80	1,146	,296	2,17	3,43	1	5
	Orion	47	3,36	1,072	,156	3,05	3,68	1	5
	others	20	2,85	1,268	,284	2,26	3,44	1	5
	Total	386	3,65	1,001	,051	3,55	3,75	1	5
Influence_brandpositioni	Amorelie	214	4,42	,883	,060	4,30	4,53	1	5
ng	Eis.de	90	3,21	1,250	,132	2,95	3,47	1	5
	Beate Uhse	15	2,93	1,223	,316	2,26	3,61	1	5
	Orion	47	3,49	1,283	,187	3,11	3,87	1	5
	others	20	2,70	1,174	,263	2,15	3,25	1	4
	Total	386	3,88	1,225	,062	3,75	4,00	1	5
Inlfuence_distribution	Amorelie	214	4,08	,684	,047	3,99	4,17	1	5
	Eis.de	90	3,69	1,067	,112	3,47	3,91	1	5
	Beate Uhse	15	3,00	1,134	,293	2,37	3,63	1	5
	Orion	47	3,43	,994	,145	3,13	3,72	1	5
	others	20	3,30	1,218	,272	2,73	3,87	1	5
	Total	386	3,83	,928	,047	3,73	3,92	1	5

Influence_innovation	Amorelie	214	2,53	,837	,057	2,42	2,65	1	5
	Eis.de	90	3,10	1,152	,121	2,86	3,34	1	5
	Beate Uhse	15	3,07	1,580	,408	2,19	3,94	1	5
	Orion	47	2,60	1,014	,148	2,30	2,89	1	5
	others	20	3,60	1,231	,275	3,02	4,18	1	5
	Total	386	2,75	1,040	,053	2,64	2,85	1	5
Influence_price	Amorelie	214	3,71	,771	,053	3,60	3,81	1	5
	Eis.de	90	4,16	,860	,091	3,98	4,34	1	5
	Beate Uhse	15	4,00	,756	,195	3,58	4,42	2	5
	Orion	47	4,04	,908	,132	3,78	4,31	1	5
	others	20	3,70	1,081	,242	3,19	4,21	1	5
	Total	386	3,86	,846	,043	3,78	3,95	1	5
Influence_anonymity	Amorelie	214	3,90	,731	,050	3,80	4,00	1	5
	Eis.de	90	3,67	1,446	,152	3,36	3,97	1	5
	Beate Uhse	15	3,60	1,242	,321	2,91	4,29	1	5
	Orion	47	3,70	1,041	,152	3,40	4,01	1	5
	others	20	2,90	1,210	,270	2,33	3,47	1	5
	Total	386	3,76	1,043	,053	3,65	3,86	1	5

Appendix 12: SPSS results: crosstab masculinity*brand preference

Crosstabs

Case Processing Summary

	Cases						
	Va	alid	Missing		Total		
	Ν	Percent	Ν	Percent	Ν	Percent	
amorelie_no * amorelie_masculine	386	100,0%	0	0,0%	386	100,0%	

amorelie_no * amorelie_masculine Crosstabulation

			masculine		
			,00	1,00	Total
amorelie_no	,00	Count	212	2	214
	Ex		196,8	17,2	214,0
	1,00	Count	143	29	172
		Expected Count	158,2	13,8	172,0
Total		Count	355	31	386
		Expected Count	355,0	31,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	32,745 ^a	1	,000		
Continuity Correction	30,624	1	,000		
Likelihood Ratio	37,062	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	32,660	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 13,81.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,291	,036	5,966
Ordinal by Ordinal	Spearman Correlation	,291	,036	5,966
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases					
	Valid Missing			Total		
	Ν	Percent	Ν	Percent	Ν	Percent
Eis_no * Eis_masculin	386	100,0%	0	0,0%	386	100,0%

Eis_no * Eis_masculin Crosstabulation

			,00	1,00	Total
Eis_no	,00	Count	74	16	90
		Expected Count	49,4	40,6	90,0
	1,00	Count	138	158	296
		Expected Count	162,6	133,4	296,0
Total		Count	212	174	386
		Expected Count	212,0	174,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	35,331 ^a	1	,000		
Continuity Correction	33,907	1	,000		
Likelihood Ratio	38,131	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	35,239	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 40,57.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,303	,043	6,220
Ordinal by Ordinal	Spearman Correlation	,303	,043	6,220
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases						
	Va	Valid		Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent	
BU_no * BU_masculin	386	100,0%	0	0,0%	386	100,0%	

BU_no * BU_masculin Crosstabulation

			,00	1,00	Total
BU_no	,00	Count	11	4	15
		Expected Count	3,2	11,8	15,0
	1,00	Count	72	299	371
		Expected Count	79,8	291,2	371,0
Total		Count	83	303	386
		Expected Count	83,0	303,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	24,839 ^a	1	,000		
Continuity Correction	21,747	1	,000		
Likelihood Ratio	19,343	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	24,775	1	,000		
N of Valid Cases	386				

a. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 3,23.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,254	,062	5,139
Ordinal by Ordinal	Spearman Correlation	,254	,062	5,139
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases						
	Valid		Missing		Total		
	Ν	Percent	Ν	Percent	Ν	Percent	
Orion_no * Orion_masculin	386	100,0%	0	0,0%	386	100,0%	

C----

Orion_no * Orion_masculin Crosstabulation

			,00	1,00	Total
Orion_no	,00	Count	20	27	47
		Expected Count	11,3	35,7	47,0
	1,00	Count	73	266	339
		Expected Count	81,7	257,3	339,0
Total		Count	93	293	386
		Expected Count	93,0	293,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	9,972 ^a	1	,002		
Continuity Correction	8,856	1	,003		
Likelihood Ratio	8,951	1	,003		
Fisher's Exact Test				,003	,002
Linear-by-Linear Association	9,946	1	,002		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 11,32.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,161	,058	3,191
Ordinal by Ordinal	Spearman Correlation	,161	,058	3,191
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,002 ^c
Ordinal by Ordinal	Spearman Correlation	,002 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Appendix 13: SPSS results: Multiple response groupings for distribution channel frequencies

```
MULT RESPONSE GROUPS=$distribution_channel'distribution_channel_preference
' (distrib_phy_stores
    distrib_online_pcdistrib_online_mobiledistrib_catalogue(1))
/FREQUENCIES=$distribution_channel
```

Multiple Response

Notes

Output Created		18-JUL-2017 17:41:17
Comments		
Input	Data	/Users/laura/Desktop/fi nal variable name backup .sav
	Active Dataset	DataSet1
	Filter	<none></none>
	Weight	<none></none>
	Split File	<none></none>
	N of Rows in Working Data File	386
Missing Value Handling	Definition of Missing	User-defined missing values are treated as missing.
	Cases Used	Statistics for each table are based on all the cases with valid data in the specified range(s) for all variables in each table.
Syntax		MULT RESPONSE GROUPS=\$distribution_c hannel 'distribution_channel_pr eference' (distrib_phy_stores distrib_online_pc distrib_online_mobile distrib_catalogue (1)) /FREQUENCIES=\$distrib ution_channel.
Resources	Processor Time	00.00.00 01
100001000	Flansed Time	00.00.00 00
	2000000000	00.00.00,00

Case Summary

	Cases						
	Valid		Missing		Total		
	Ν	Percent	Ν	Percent	Ν	Percent	
\$distribution_channel	386	100,0%	0	0,0%	386	100,0%	

a. Dichotomy group tabulated at value 1.

\$distribution_channel Frequencies

		Resp	onses	Percent of
		Ν	Percent	Cases
distribution_channel_pref erence ^a	Distrib_phy_stores	124	16,0%	32,1%
	Distrib_Online_PC	354	45,7%	91,7%
	Distrib_Online_mobile	290	37,4%	75,1%
	Distrib_Catalogue	7	0,9%	1,8%
Total		775	100,0%	200,8%

a. Dichotomy group tabulated at value 1.

Appendix 14: SPSS results: crosstab analysis for Q. 2 & Q. 14

MULT RESPONSE GROUPS=\$distribution_channel 'distribution_channel_preference' (Distrib _phy_stores Distrib_Online_PC Distrib_Online_mobile Distrib_Catalogue (1)) /VARIABLES=Age(1 5) /TABLES=Age BY \$distribution_channel /CELLS=ROW COLUMN TOTAL /BASE=CASES.

Multiple Response

Case Summary

	Cases						
	Valid		Missing		Total		
	N	Percent	N	Percent	N	Percent	
Age*\$distribution_chann el	386	100,0%	0	0,0%	386	100,0%	

Age*\$distribution_channel Crosstabulation

				distribution_char	nnel_preference ^a		
			Distrib_phy_s tores	Distrib_Onlin e_PC	Distrib_Onlin e_mobile	Distrib_Catal ogue	Total
Age	25-34	Count	75	158	127	4	182
		% within Age	41,2%	86,8%	69,8%	2,2%	
35-44		% within \$distribution_channel	60,5%	44,6%	43,8%	57,1%	
		% of Total	19,4%	40,9%	32,9%	1,0%	47,2%
	35-44	Count	25	119	103	3	123
		% within Age	20,3%	96,7%	83,7%	2,4%	
		% within \$distribution_channel	20,2%	33,6%	35,5%	42,9%	
		% of Total	6,5%	30,8%	26,7%	0,8%	31,9%
	45-54	Count	24	77	60	0	81
		% within Age	29,6%	95,1%	74,1%	0,0%	
		% within \$distribution_channel	19,4%	21,8%	20,7%	0,0%	
		% of Total	6,2%	19,9%	15,5%	0,0%	21,0%
Total		Count	124	354	290	7	386
		% of Total	32,1%	91.7%	75,1%	1,8%	100.0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Appendix 15: SPSS results: mean values for Q. 15

DESCRIPTIVES VARIABLES=Distribution_amorelie Distribution_eis Distribution_BU Distribution_orion /STATISTICS=MEAN STDDEV VARIANCE MIN MAX.

Descriptives

Descriptive Statistics										
	Ν	Minimum	Maximum	Mean	Std. Deviation	Variance				
Distribution_amorelie	386	1	5	4,16	,901	,812				
Distribution_eis	386	1	5	4,16	,887	,786				
Distribution_BU	386	1	5	2,17	1,103	1,216				
Distribution_orion	386	1	5	2,46	,840	,706				
Valid N (listwise)	386									

Appendix 16: Usage of online shopping in Germany according to gender from 2013-2016 (Source: VuMA, 2017)



deutschsprachige Bevölkerung

Appendix 17: SPSS results: crosstab and chi-square distribution*brand preference

Case Processing Summary

	Cases						
	Valid		Missing		Total		
	Ν	Percent	N	Percent	Ν	Percent	
amorelie_yes * distribution_amorelie_at trac	386	100,0%	0	0,0%	386	100,0%	

amorelie_yes * distribution_amorelie_attrac Crosstabulation

			distribution_an		
			,00	1,00	Total
amorelie_yes	,00	Count	72	100	172
		Expected Count	35,2	136,8	172,0
	1,00	Count	7	207	214
		Expected Count	43,8	170,2	214,0
Total		Count	79	307	386
		Expected Count	79,0	307,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	87,237 ^a	1	,000		
Continuity Correction ^b	84,882	1	,000		
Likelihood Ratio	95,736	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	87,011	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 35,20.

Case Processing Summary

	Cases						
	Valid		Missing		Total		
	Ν	Percent	N	Percent	N	Percent	
BeateUhse_yes * Distribution_BU_attract	386	100,0%	0	0,0%	386	100,0%	

BeateUhse_yes * Distribution_BU_attract Crosstabulation

			Distribution		
			,00	1,00	Total
BeateUhse_yes	,00	Count	327	44	371
		Expected Count	321,0	50,0	371,0
	1,00	Count	7	8	15
		Expected Count	13,0	2,0	15,0
Total		Count	334	52	386
		Expected Count	334,0	52,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	21,274 ^a	1	,000		
Continuity Correction ^b	17,865	1	,000		
Likelihood Ratio	14,228	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	21,219	1	,000		
N of Valid Cases	386				

a. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 2,02.

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	Ν	Percent	N	Percent	N	Percent
Eis_yes * Distribution_Eis_attract	386	100,0%	0	0,0%	386	100,0%

Eis_yes * Distribution_Eis_attract Crosstabulation

			Distribution		
			,00	1,00	Total
Eis_yes	,00	Count	65	231	296
		Expected Count	58,3	237,7	296,0
	1,00	Count	11	79	90
		Expected Count	17,7	72,3	90,0
Total		Count	76	310	386
		Expected Count	76,0	310,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	4,138 ^a	1	,042		
Continuity Correction ^b	3,545	1	,060		
Likelihood Ratio	4,495	1	,034		
Fisher's Exact Test				,049	,026
Linear-by-Linear Association	4,128	1	,042		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 17,72.

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent
Orion_yes * Distribution_Orion_attra ct	386	100,0%	0	0,0%	386	100,0%

Orion_yes * Distribution_Orion_attract Crosstabulation

			Distribution_C		
			,00	1,00	Total
Orion_yes	,00	Count	309	30	339
		Expected Count	296,8	42,2	339,0
	1,00	Count	29	18	47
		Expected Count	41,2	5,8	47,0
Total		Count	338	48	386
		Expected Count	338,0	48,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	32,874 ^a	1	,000		
Continuity Correction ^b	30,225	1	,000		
Likelihood Ratio	24,583	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	32,788	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 5,84.

Appendix 18: SPSS results: crosstab & chi-square test brand preference*influence distribution channel*attractiveness of brands distribution channel

Crosstabs

Case Processing Summary						
	Cases					
	Valid Missing Total					
	Ν	Percent	Ν	Percent	Ν	Percent
amorelie_yes * distribution_amorelie_attr ac * distribution_influence	386	100,0%	0	0,0%	386	100,0%

amorelie_yes * distribution_amorelie_attrac * distribution_influence Crosstabulation

distrib	ution_influence			,00	1,00	Total
,00	amorelie_yes	,00	Count	44	29	73
			Expected Count	36,9	36,1	73,0
		1,00	Count	2	16	18
			Expected Count	9,1	8,9	18,0
	Total		Count	46	45	91
			Expected Count	46,0	45,0	91,0
1,00	amorelie_yes	,00	Count	28	71	99
			Expected Count	11,1	87,9	99,0
		1,00	Count	5	191	196
			Expected Count	21,9	174,1	196,0
	Total		Count	33	262	295
			Expected Count	33,0	262,0	295,0
Total	amorelie_yes	,00	Count	72	100	172
			Expected Count	35,2	136,8	172,0
		1,00	Count	7	207	214
			Expected Count	43,8	170,2	214,0
	Total		Count	79	307	386
			Expected Count	79,0	307,0	386,0

distributi	ion_influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	13,962 ^c	1	,000	
	Continuity Correction	12,064	1	,001	
	Likelihood Ratio	15,489	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	13,808	1	,000	
	N of Valid Cases	91			
1,00	Pearson Chi-Square	43,837 ^d	1	,000	
	Continuity Correction	41,285	1	,000	
	Likelihood Ratio	42,246	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	43,688	1	,000	
	N of Valid Cases	295			
Total	Pearson Chi-Square	87,237 ^a	1	,000	
	Continuity Correction	84,882	1	,000	
	Likelihood Ratio	95,736	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	87,011	1	,000	
	N of Valid Cases	386			

Chi-Square Tests
Case Processing Summary

	Cases						
	Va	alid	Mis	Missing		Total	
	Ν	Percent	Ν	Percent	N	Percent	
Eis_yes * Distribution_Eis_attract * distribution_influence	386	100,0%	0	0,0%	386	100,0%	

Eis_yes * Distribution_Eis_attract * distribution_influence Crosstabulation

Distribution_Eis_attract						
distrib	ution_influ	ience		,00	1,00	Total
,00	Eis_yes	,00	Count	35	22	57
			Expected Count	25,7	31,3	57,0
		1,00	Count	6	28	34
			Expected Count	15,3	18,7	34,0
	Total		Count	41	50	91
			Expected Count	41,0	50,0	91,0
1,00	Eis_yes	,00	Count	30	209	239
			Expected Count	28,4	210,6	239,0
		1,00	Count	5	51	56
			Expected Count	6,6	49,4	56,0
	Total		Count	35	260	295
			Expected Count	35,0	260,0	295,0
Total	Eis_yes	,00	Count	65	231	296
			Expected Count	58,3	237,7	296,0
		1,00	Count	11	79	90
			Expected Count	17,7	72,3	90,0
	Total		Count	76	310	386
			Expected Count	76,0	310,0	386,0

Chi-Square Tests

distributio	n influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-
	Deersen Chi Cause		4	(_ 0.000)	olaca)
,00	Pearson Chi-Square	16,471	1	,000	
	Continuity Correction	14,751	1	,000	
	Likelihood Ratio	17,546	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	16,290	1	,000	
	N of Valid Cases	91			
1,00	Pearson Chi-Square	,570 ^d	1	,450	
	Continuity Correction	,276	1	,599	
	Likelihood Ratio	,606	1	,436	
	Fisher's Exact Test				,646
	Linear-by-Linear Association	,568	1	,451	
	N of Valid Cases	295			
Total	Pearson Chi-Square	4,138 ^a	1	,042	
	Continuity Correction	3,545	1	,060	
	Likelihood Ratio	4,495	1	,034	
	Fisher's Exact Test				,049
	Linear-by-Linear Association	4,128	1	,042	
	N of Valid Cases	386			

Case Processing Summary

	Cases						
	Va	Valid		Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent	
BeateUhse_yes * Distribution_BU_attract * distribution_influence	386	100,0%	0	0,0%	386	100,0%	

BeateUhse_yes * Distribution_BU_attract * distribution_influence Crosstabulation

				Distribution	_BU_attract	
distrib	ution_influence			,00	1,00	Total
,00	BeateUhse_yes	,00	Count	66	15	81
			Expected Count	62,3	18,7	81,0
		1,00	Count	4	6	10
			Expected Count	7,7	2,3	10,0
	Total		Count	70	21	91
			Expected Count	70,0	21,0	91,0
1,00	BeateUhse_yes	,00	Count	261	29	290
		Expected Count	259,5	30,5	290,0	
		1,00	Count	3	2	5
			Expected Count	4,5	,5	5,0
	Total		Count	264	31	295
			Expected Count	264,0	31,0	295,0
Total	BeateUhse_yes	,00	Count	327	44	371
			Expected Count	321,0	50,0	371,0
		1,00	Count	7	8	15
			Expected Count	13,0	2,0	15,0
	Total		Count	334	52	386
			Expected Count	334,0	52,0	386,0

distributio	n_influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	8,628 ^c	1	,003	
	Continuity Correction	6,450	1	,011	
	Likelihood Ratio	7,232	1	,007	
	Fisher's Exact Test				,009
	Linear-by-Linear Association	8,533	1	,003	
	N of Valid Cases	91			
1,00	Pearson Chi-Square	4,704 ^d	1	,030	
-	Continuity Correction	2,055	1	,152	
	Likelihood Ratio	3,029	1	,082	
	Fisher's Exact Test				,087
	Linear-by-Linear Association	4,688	1	,030	
	N of Valid Cases	295			
Total	Pearson Chi-Square	21,274 ^a	1	,000	
	Continuity Correction	17,865	1	,000	
	Likelihood Ratio	14,228	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	21,219	1	,000	
	N of Valid Cases	386			

Chi-Square Tests

Case Processing Summary

	Cases						
	Valid		Mis	Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent	
Orion_yes * Distribution_Orion_attract * distribution_influence	386	100,0%	0	0,0%	386	100,0%	

Orion_yes * Distribution_Orion_attract * distribution_influence Crosstabulation

	Distribution_Orion_attract					
distrib	ution_influen	се		,00	1,00	Total
,00	Orion_yes	,00	Count	58 13		71
			Expected Count	53,1	17,9	71,0
		1,00	Count	10	10	20
			Expected Count	14,9	5,1	20,0
	Total		Count	68	23	91
			Expected Count	68,0	23,0	91,0
1,00	Orion_yes	,00	Count	251	17	268
			Expected Count	245,3	22,7	268,0
		1,00	Count	19	8	27
			Expected Count	24,7	2,3	27,0
	Total		Count	270	25	295
			Expected Count	270,0	25,0	295,0
Total	Orion_yes	,00	Count	309	30	339
			Expected Count	296,8	42,2	339,0
		1,00	Count	29	18	47
			Expected Count	41,2	5,8	47,0
	Total		Count	338	48	386
			Expected Count	338,0	48,0	386,0

distribution	_influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	re 8,297 ^c		,004	
-	Continuity Correction	6,704	1	,010	
-	Likelihood Ratio	7,564	1	,006	
-	Fisher's Exact Test				,008
	Linear-by-Linear Association	8,206	1	,004	
	N of Valid Cases	91			
1,00	Pearson Chi-Square	17,148 ^d	1	,000	
	Continuity Correction	14,277	1	,000	
	Likelihood Ratio	11,746	1	,001	
	Fisher's Exact Test				,001
-	Linear-by-Linear Association	17,090	1	,000	
-	N of Valid Cases	295			
Total	Pearson Chi-Square	32,874 ^a	1	,000	
	Continuity Correction	30,225	1	,000	
-	Likelihood Ratio	24,583	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	32,788	1	,000	
	N of Valid Cases	386			

Chi-Square Tests

Appendix 19 – SPSS results: mean values clarity of positioning per brand

DESCRIPTIVES VARIABLES=Clear_positioning_amorelie Clear_positioning_eis Clear_positioning_BU Clear_positioning_orion /STATISTICS=MEAN STDDEV VARIANCE MIN MAX.

Descriptives

	N	Minimum	Maximum	Mean	Std. Deviation	Variance	
Clear_positioning_amore lie	386	1	5	4,27	,902	,814	
Clear_positioning_eis	386	1	5	2,77	1,149	1,319	
Clear_positioning_BU	386	1	5	4,19	,898	,806	
Clear_positioning_orion	386	1	5	2,75	1,201	1,443	
Valid N (listwise)	386						

Descriptive Statistics

Appendix 20 – SPSS results: crosstab & chi-square brand preference*clarity positioning

Crosstabs

Case Processing Summary

	Cases					
	Va	lid	Missing		Total	
	Ν	Percent	N	Percent	N	Percent
amorelie_yes * positioning_amorelie_cle ar	386	100,0%	0	0,0%	386	100,0%

amorelie_yes * positioning_amorelie_clear Crosstabulation

			positioning_ar	norelie_clear	
			,00,	1,00	Total
amorelie_yes	,00	Count	72	100	172
		Expected Count	35,6	136,4	172,0
	1,00	Count	8	206	214
		Expected Count	44,4	169,6	214,0
Total		Count	80	306	386
		Expected Count	80,0	306,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	84,348 ^a	1	,000		
Continuity Correction ^b	82,043	1	,000		
Likelihood Ratio	91,802	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	84,129	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 35,65.

Case Processing Summary

	Cases						
	Va	lid	Missing		Total		
	N Percent N Percen		Percent	Ν	Percent		
Eis_yes * Positioning_eis_clear	386	100,0%	0	0,0%	386	100,0%	

Eis_yes * Positioning_eis_clear Crosstabulation

			Positioning	_eis_clear	
			,00	1,00	Total
Eis_yes	,00	Count	241	55	296
		Expected Count	215,5	80,5	296,0
	1,00	Count	40	50	90
		Expected Count	65,5	24,5	90,0
Total		Count	281	105	386
		Expected Count	281,0	105,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	47,646 ^a	1	,000		
Continuity Correction ^b	45,798	1	,000		
Likelihood Ratio	43,952	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	47,523	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 24,48.

Case Processing Summary

	Cases						
	Va	lid	Missing		Total		
	N Percent		Ν	Percent	Ν	Percent	
BeateUhse_yes * Positioning_BU_clear	386	100,0%	0	0,0%	386	100,0%	

BeateUhse_yes * Positioning_BU_clear Crosstabulation

			Positioning_BU_clear				
			,00	1,00	Total		
BeateUhse_yes	,00	Count	76	295	371		
		Expected Count	76,9	294,1	371,0		
	1,00	Count	4	11	15		
		Expected Count	3,1	11,9	15,0		
Total		Count	80	306	386		
		Expected Count	80,0	306,0	386,0		

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1–sided)
Pearson Chi-Square	,335 ^a	1	,563		
Continuity Correction ^b	,065	1	,799		
Likelihood Ratio	,316	1	,574		
Fisher's Exact Test				,524	,379
Linear-by-Linear Association	,334	1	,563		
N of Valid Cases	386				

a. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 3,11.

Case Processing Summary

	Cases						
	Va	lid	Missing		Total		
	Ν	Percent	Ν	Percent	Ν	Percent	
Orion_yes * Positioning_orion_clear	386	100,0%	0	0,0%	386	100,0%	

Orion_yes * Positioning_orion_clear Crosstabulation

			Positioning_		
			,00	1,00	Total
Orion_yes	,00	Count	258	81	339
		Expected Count	255,6	83,4	339,0
	1,00	Count	33	14	47
		Expected Count	35,4	11,6	47,0
Total		Count	291	95	386
		Expected Count	291,0	95,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-sided)	Exact Sig. (1-sided)
Pearson Chi-Square	,773 ^a	1	,379		
Continuity Correction ^b	,488	1	,485		
Likelihood Ratio	,745	1	,388		
Fisher's Exact Test				,371	,239
Linear-by-Linear Association	,771	1	,380		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 11,57.

Appendix 21 – SPSS results: crosstab & chi-square brand preference*clarity positioning*influence brand positioning

Crosstabs

Case Processing Summary

	Cases						
	Va	alid	Missing		Total		
	Ν	Percent	Ν	Percent	Ν	Percent	
amorelie_yes * positioning_amorelie_clea r * brandpositioning_Influenc e	386	100,0%	0	0,0%	386	100,0%	

amorelie_yes * positioning_amorelie_clear * brandpositioning_Influence Crosstabulation

	norelie_clear					
brandp	ositioning_Influ	ence		,00	1,00	Total
,00	amorelie_yes	,00	Count	51	41	92
			Expected Count	47,2	44,8	92,0
		1,00	Count	6	13	19
			Expected Count	9,8	9,2	19,0
	Total		Count	57	54	111
			Expected Count	57,0	54,0	111,0
1,00	amorelie_yes	,00	Count	21	59	80
			Expected Count	6,7	73,3	80,0
		1,00	Count	2	193	195
			Expected Count	16,3	178,7	195,0
	Total		Count	23	252	275
			Expected Count	23,0	252,0	275,0
Total	amorelie_yes	,00	Count	72	100	172
			Expected Count	35,6	136,4	172,0
			Count	8	206	214
			Expected Count	44,4	169,6	214,0
	Total		Count	80	306	386
			Expected Count	80,0	306,0	386,0

brandposition	ing_Influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	3,587 ^c	1	,058	
	Continuity Correction	2,696	1	,101	
	Likelihood Ratio	3,649	1	,056	
	Fisher's Exact Test				,078
	Linear-by-Linear Association	3,555	1	,059	
	N of Valid Cases	111			
1,00	Pearson Chi-Square	47,094 ^d	1	,000	
	Continuity Correction	43,861	1	,000	
	Likelihood Ratio	43,755	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	46,923	1	,000	
	N of Valid Cases	275			
Total	Pearson Chi-Square	84,348 ^a	1	,000	
	Continuity Correction	82,043	1	,000	
	Likelihood Ratio	91,802	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	84,129	1	,000	
	N of Valid Cases	386			

Chi-Square Tests

Chi-Square Tests

brandposition	Exact Sig. (1- sided)	
,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,050
	Linear-by-Linear Association	
	N of Valid Cases	
1,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,000
	Linear-by-Linear Association	
	N of Valid Cases	
Total	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,000
	Linear-by-Linear Association	
	N of Valid Cases	

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 35,65.

b. Computed only for a 2x2 table

c. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 9,24.

d. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 6,69.

Symmetric Measures

				Asymptotic Standard Error	Approximate T ^b
brandpo	sitioning_Influence		Value	a	
,00	Interval by Interval	Pearson's R	,180	,091	1,908
	Ordinal by Ordinal	Spearman Correlation	,180	,091	1,908
	N of Valid Cases		111		
1,00	Interval by Interval	Pearson's R	,414	,054	7,511
	Ordinal by Ordinal	Spearman Correlation	,414	,054	7,511
	N of Valid Cases		275		
Total	Interval by Interval	Pearson's R	,467	,039	10,362
	Ordinal by Ordinal	Spearman Correlation	,467	,039	10,362
	N of Valid Cases		386		

Symmetric Measures

brandpo	Approximate Significance		
,00	Interval by Interval	Pearson's R	,059 ^c
	Ordinal by Ordinal	Spearman Correlation	,059 ^c
	N of Valid Cases		
1,00	Interval by Interval	Pearson's R	,000 ^c
	Ordinal by Ordinal	Spearman Correlation	,000 ^c
	N of Valid Cases		
Total	Interval by Interval	Pearson's R	,000 ^c
	Ordinal by Ordinal	Spearman Correlation	,000 ^c
	N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases						
	Valid		Mis	Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent	
Eis_yes * Positioning_eis_clear * brandpositioning_Influenc e	386	100,0%	0	0,0%	386	100,0%	

Eis_yes * Positioning_eis_clear * brandpositioning_Influence Crosstabulation

				Positionin	g_eis_clear	
brandp	ositioning	_Influen	се	,00	1,00	Total
,00	Eis_yes	,00	Count	40	23	63
			Expected Count	36,3	26,7	63,0
		1,00	Count	24	24	48
			Expected Count	27,7	20,3	48,0
	Total		Count	64	47	111
			Expected Count	64,0	47,0	111,0
1,00	1,00 Eis_yes ,00		Count	201	32	233
			Expected Count	183,9	49,1	233,0
		1,00	Count	16	26	42
			Expected Count	33,1	8,9	42,0
	Total		Count	217	58	275
			Expected Count	217,0	58,0	275,0
Total	Eis_yes	,00	Count	241	55	296
			Expected Count	215,5	80,5	296,0
	1,00		Count	40	50	90
			Expected Count	65,5	24,5	90,0
	Total		Count	281	105	386
			Expected Count	281,0	105,0	386,0

Chi-Square Tests

h von de o citi o e	ing Influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2-
brandposition	ing_initience	value	ui	(2 31000)	Sidedy
,00	Pearson Chi-Square	2,031	1	,154	
	Continuity Correction	1,516	1	,218	
	Likelihood Ratio	2,031	1	,154	
	Fisher's Exact Test				,178
	Linear-by-Linear Association	2,013	1	,156	
	N of Valid Cases	111			
1,00	Pearson Chi-Square	49,616 ^d	1	,000	
	Continuity Correction	46,763	1	,000	
	Likelihood Ratio	41,069	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	49,435	1	,000	
	N of Valid Cases	275			
Total	Pearson Chi-Square	47,646 ^a	1	,000	
	Continuity Correction	45,798	1	,000	
	Likelihood Ratio	43,952	1	,000	
	Fisher's Exact Test				,000
	Linear-by-Linear Association	47,523	1	,000	
	N of Valid Cases	386			

Symmetric Measures

				Asymptotic Standard Error	Approximate T ^b
brandpo	sitioning_Influence		Value	а	
,00	Interval by Interval	Pearson's R	,135	,094	1,425
	Ordinal by Ordinal	Spearman Correlation	,135	,094	1,425
	N of Valid Cases		111		
1,00	Interval by Interval	Pearson's R	,425	,069	7,752
	Ordinal by Ordinal	Spearman Correlation	,425	,069	7,752
	N of Valid Cases		275		
Total	Interval by Interval	Pearson's R	,351	,054	7,354
	Ordinal by Ordinal	Spearman Correlation	,351	,054	7,354
	N of Valid Cases		386		

Symmetric Measures

brandpo	Approximate Significance		
,00	Interval by Interval	Pearson's R	,157 ^c
	Ordinal by Ordinal	Spearman Correlation	,157 ^c
	N of Valid Cases		
1,00	Interval by Interval	Pearson's R	,000 ^c
	Ordinal by Ordinal	Spearman Correlation	,000 ^c
	N of Valid Cases		
Total	Interval by Interval	Pearson's R	,000 ^c
	Ordinal by Ordinal	Spearman Correlation	,000 ^c
	N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases						
	Valid		Mis	Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent	
BeateUhse_yes * Positioning_BU_clear * brandpositioning_Influenc e	386	100,0%	0	0,0%	386	100,0%	

BeateUhse_yes * Positioning_BU_clear * brandpositioning_Influence Crosstabulation

		Positionin	g_BU_clear			
brandp	ositioning_Influer	,00	1,00	Total		
,00	BeateUhse_yes	,00	Count	39	63	102
			Expected Count	38,6	63,4	102,0
		1,00	Count	3	6	9
			Expected Count	3,4	5,6	9,0
	Total		Count	42	69	111
			Expected Count	42,0	69,0	111,0
1,00	BeateUhse_yes	s ,00 	Count	37	232	269
			Expected Count	37,2	231,8	269,0
			Count	1	5	6
			Expected Count	,8	5,2	6,0
	Total		Count	38	237	275
			Expected Count	38,0	237,0	275,0
Total	BeateUhse_yes	,00	Count	76	295	371
			Expected Count	76,9	294,1	371,0
		1,00	Count	4	11	15
			Expected Count	3,1	11,9	15,0
	Total		Count	80	306	386
			Expected Count	80,0	306,0	386,0

Chi-Square Tests

brandpositi	oning_Influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	,084 ^c	1	,771	
	Continuity Correction	,000	1	1,000	
	Likelihood Ratio	,086	1	,770	
	Fisher's Exact Test				1,000
	Linear-by-Linear Association	,084	,084 1		
	N of Valid Cases	111			
1,00	Pearson Chi-Square	,042 ^d	1	,838	
	Continuity Correction	,000	1	1,000	
	Likelihood Ratio	,040	1	,842	
	Fisher's Exact Test				,594
	Linear-by-Linear Association	,042	1	,838	
	N of Valid Cases	275			
Total	Pearson Chi-Square	,335 ^a	1	,563	
	Continuity Correction	,065	1	,799	
	Likelihood Ratio	,316	1	,574	
	Fisher's Exact Test				,524
	Linear-by-Linear Association	,334	1	,563	
	N of Valid Cases	386			

brandpositio	Exact Sig. (1- sided)	
,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,537
	Linear-by-Linear Association	
	N of Valid Cases	
1,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,594
	Linear-by-Linear Association	
	N of Valid Cases	
Total	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,379
	Linear-by-Linear Association	
	N of Valid Cases	

Chi-Square Tests

a. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 3,11.

b. Computed only for a 2x2 table

c. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 3,41.

d. 1 cells (25,0%) have expected count less than 5. The minimum expected count is ,83.

Symmetric Measures

				Asymptotic Standard Error	Approximate T ^b
brandpo	sitioning_Influence		Value	a	
,00	Interval by Interval	Pearson's R	,028	,093	,288
	Ordinal by Ordinal	Spearman Correlation	,028	,093	,288
	N of Valid Cases		111		
1,00	Interval by Interval	Pearson's R	-,012	,065	-,204
	Ordinal by Ordinal	Spearman Correlation	-,012	,065	-,204
	N of Valid Cases		275		
Total	Interval by Interval	Pearson's R	-,029	,055	-,578
	Ordinal by Ordinal	Spearman Correlation	-,029	,055	-,578
	N of Valid Cases		386		

Symmetric Measures

brandpo	sitioning_Influence		Approximate Significance
,00	Interval by Interval	Pearson's R	,774 ^c
	Ordinal by Ordinal	Spearman Correlation	,774 [°]
	N of Valid Cases		
1,00	Interval by Interval	Pearson's R	,839 ^c
	Ordinal by Ordinal	Spearman Correlation	,839 ^c
	N of Valid Cases		
Total	Interval by Interval	Pearson's R	,564 ^c
	Ordinal by Ordinal	Spearman Correlation	,564 ^c
	N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Cases Valid Missing Total Ν Percent Ν Percent Ν Percent Orion_yes * Positioning_orion_clear * brandpositioning_Influenc 100,0% 386 100,0% 0 0,0% 386 е

Case Processing Summary

Orion_yes * Positioning_orion_clear * brandpositioning_Influence Crosstabulation

	Positioning_orion_clear					
brandp	ositioning_Ir	nfluence		,00	1,00	Total
,00	Orion_yes	,00	Count	48	41	89
			Expected Count	48,1	40,9	89,0
		1,00	Count	12	10	22
			Expected Count	11,9	10,1	22,0
	Total		Count	60	51	111
			Expected Count	60,0	51,0	111,0
1,00	Orion_yes	,00	Count	210	40	250
			Expected Count	210,0	40,0	250,0
		1,00	Count	21	4	25
			Expected Count	21,0	4,0	25,0
	Total		Count	231	44	275
			Expected Count	231,0	44,0	275,0
Total	Orion_yes	,00	Count	258	81	339
			Expected Count	255,6	83,4	339,0
		1,00	Count	33	14	47
			Expected Count	35,4	11,6	47,0
	Total		Count	291	95	386
			Expected Count	291,0	95,0	386,0

Chi-Square Tests

brandposition	ning_Influence	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)
,00	Pearson Chi-Square	,003 ^c	1	,959	
	Continuity Correction	,000	1	1,000	
	Likelihood Ratio	,003	1	,959	
	Fisher's Exact Test				1,000
	Linear-by-Linear Association	,003	1	,959	
	N of Valid Cases	111			
1,00	Pearson Chi-Square	,000 ^d	1	1,000	
	Continuity Correction	,000	1	1,000	
	Likelihood Ratio	,000	1	1,000	
	Fisher's Exact Test				1,000
	Linear-by-Linear Association	,000	1	1,000	
	N of Valid Cases	275			
Total	Pearson Chi-Square	,773 ^a	1	,379	
	Continuity Correction	,488	1	,485	
	Likelihood Ratio	,745	1	,388	
	Fisher's Exact Test				,371
	Linear-by-Linear Association	,771	1	,380	
	N of Valid Cases	386			

brandpositio	Exact Sig. (1- sided)	
,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,576
	Linear-by-Linear Association	
	N of Valid Cases	
1,00	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,631
	Linear-by-Linear Association	
	N of Valid Cases	
Total	Pearson Chi-Square	
	Continuity Correction	
	Likelihood Ratio	
	Fisher's Exact Test	,239
	Linear-by-Linear Association	
	N of Valid Cases	

Chi-Square Tests

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 11,57.

b. Computed only for a 2x2 table

c. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 10,11.

d. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 4,00.

Symmetric Measures

				Asymptotic Standard Error	Approximate T ^b
brandpo	sitioning_Influence		Value	a	
,00	Interval by Interval	Pearson's R	-,005	,095	-,051
	Ordinal by Ordinal	Spearman Correlation	-,005	,095	-,051
	N of Valid Cases		111		
1,00	Interval by Interval	Pearson's R	,000	,060	,000
	Ordinal by Ordinal	Spearman Correlation	,000	,060	,000
	N of Valid Cases		275		
Total	Interval by Interval	Pearson's R	,045	,054	,878
	Ordinal by Ordinal	Spearman Correlation	,045	,054	,878
	N of Valid Cases		386		

Symmetric Measures

brandpo	sitioning_Influence		Approximate Significance
,00	Interval by Interval	Pearson's R	,959 [°]
	Ordinal by Ordinal	Spearman Correlation	,959 [°]
	N of Valid Cases		
1,00	Interval by Interval	Pearson's R	1,000 ^c
	Ordinal by Ordinal	Spearman Correlation	1,000 [°]
	N of Valid Cases		
Total	Interval by Interval	Pearson's R	,381 [°]
	Ordinal by Ordinal	Spearman Correlation	,381 [°]
	N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Appendix 22: Development of turnover e-commerce vs. physical stores 2016 compared to previous year in Germany (Source: CRR, n.d.)

Umsatzentwicklung im E-Commerce nach Endgerät in Deutschland 2016 Umsatzentwicklung im E-Commerce über mobile bzw. stationäre Geräte in Deutschland für das Jahr 2016 gegenüber dem Vorjahr



Appendix 23: SPSS results: descriptive statistics perceived risk distribution channel

DESCRIPTIVES VARIABLES=Lowrisk_phy_stores Lowrisk_Online_PC Lowrisk_Online_mobile Lowrisk_Catalogue /STATISTICS=MEAN STDDEV VARIANCE MIN MAX.

Descriptives

	Descriptive statistics							
	Ν	Minimum	Maximum	Mean	Std. Deviation	Variance		
Lowrisk_phy_stores	386	1	5	2,79	1,270	1,612		
Lowrisk_Online_PC	386	1	5	4,08	,924	,853		
Lowrisk_Online_mobile	386	1	5	3,77	,931	,866		
Lowrisk_Catalogue	386	1	5	2,50	,946	,895		
Valid N (listwise)	386							

Descriptive Statistics

Umsätze

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Appendix 24: SPSS results: crosstab & chi-square distribution preference*perceived risk

Crosstabs

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	Ν	Percent	Ν	Percent	Ν	Percent
physical_store_pref *	386	100,0%	0	0,0%	386	100,0%

physical_store_pref * phy_stores_risk Crosstabulation

			,00	1,00	Total
physical_store_pref	,00	Count	205	57	262
		Expected Count	181,9	80,1	262,0
	1,00	Count	63	61	124
		Expected Count	86,1	37,9	124,0
Total		Count	268	118	386
		Expected Count	268,0	118,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	29,853 ^a	1	,000		
Continuity Correction	28,575	1	,000		
Likelihood Ratio	28,917	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	29,776	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 37,91.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	8	
Interval by Interval	Pearson's R	,278	,052	5,673
Ordinal by Ordinal	Spearman Correlation	,278	,052	5,673
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases					
	Va	alid	Missing		Total	
	Ν	Percent	Ν	Percent	N	Percent
PC_pref * Online_PC_risk	386	100,0%	0	0,0%	386	100,0%

PC_pref * Online_PC_risk Crosstabulation

			,00	1,00	Total
PC_pref	,00	Count	19	13	32
		Expected Count	7,5	24,5	32,0
	1,00	Count	72	282	354
		Expected Count	83,5	270,5	354,0
Total		Count	91	295	386
		Expected Count	91,0	295,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	24,820 ^a	1	,000		
Continuity Correction	22,701	1	,000		
Likelihood Ratio	20,798	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	24,756	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 7,54.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,254	,060	5,137
Ordinal by Ordinal	Spearman Correlation	,254	,060	5,137
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	Ν	Percent	Ν	Percent	N	Percent
new_mobile_pref * Online_Mobile_risk	386	100,0%	0	0,0%	386	100,0%

new_mobile_pref * Online_Mobile_risk Crosstabulation

		Online_Mobile_risk			
			,00	1,00	Total
new_mobile_pref	,00	Count	58	38	96
		Expected Count	29,3	66,7	96,0
	1,00	Count	60	230	290
		Expected Count	88,7	201,3	290,0
Total		Count	118	268	386
		Expected Count	118,0	268,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	53,630 ^a	1	,000		
Continuity Correction	51,775	1	,000		
Likelihood Ratio	50,676	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	53,492	1	,000		
N of Valid Cases	386				

a. 0 cells (0,0%) have expected count less than 5. The minimum expected count is 29,35.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,373	,052	7,872
Ordinal by Ordinal	Spearman Correlation	,373	,052	7,872
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Case Processing Summary

	Cases							
	Va	alid	Mis	sing	Total			
	Ν	Percent	Ν	Percent	N	Percent		
Catalogue_pref * Catalogue_risk	386	100,0%	0	0,0%	386	100,0%		

Catalogue_pref * Catalogue_risk Crosstabulation

			Catalog	gue_risk	
			,00	1,00	Total
Catalogue_pref	,00	Count	327	52	379
		Expected Count	322,1	56,9	379,0
	1,00	Count	1	6	7
		Expected Count	5,9	1,1	7,0
Total		Count	328	58	386
		Expected Count	328,0	58,0	386,0

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)	Exact Sig. (2- sided)	Exact Sig. (1- sided)
Pearson Chi-Square	27,901 ^a	1	,000		_
Continuity Correction	22,547	1	,000		
Likelihood Ratio	17,847	1	,000		
Fisher's Exact Test				,000	,000
Linear-by-Linear Association	27,828	1	,000		
N of Valid Cases	386				

a. 1 cells (25,0%) have expected count less than 5. The minimum expected count is 1,05.

b. Computed only for a 2x2 table

Symmetric Measures

			Asymptotic Standard Error	Approximate T ^b
		Value	a	
Interval by Interval	Pearson's R	,269	,069	5,470
Ordinal by Ordinal	Spearman Correlation	,269	,069	5,470
N of Valid Cases		386		

Symmetric Measures

		Approximate Significance
Interval by Interval	Pearson's R	,000 ^c
Ordinal by Ordinal	Spearman Correlation	,000 ^c
N of Valid Cases		

a. Not assuming the null hypothesis.

b. Using the asymptotic standard error assuming the null hypothesis.

Appendix 25: 'Post-modern value' assigned per respondent (N=386) Q.6-13

0 = answer corresponding to modern values

1 = answer corresponding to post-modern values

religion	abortion	homose	politics	equality	trust	econom	environ	Average Index
		Х				у		
1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	0	1	1	0,77777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	0	1	0,666666667
1	1	1	0	1	1	1	1	0,777777778
1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	0	0	1	0,666666667
1	1	1	0	1	1	1	1	0,777777778
1	1	1	0	0	1	0	1	0,555555556
1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
0	1	1	0	1	1	1	1	0,666666667
0	0	1	0	1	1	1	0	0,44444444
0	1	1	1	1	1	1	1	0,777777778
1	0	1	0	1	1	0	1	0,555555556
1	1	1	1	1	1	0	1	0,777777778
0	1	1	0	1	1	1	1	0,666666667
1	1	1	0	1	1	0	1	0,666666667
1	0	1	0	1	1	1	1	0,666666667
1	1	1	0	1	0	0	1	0,555555556
0	0	1	1	0	1	1	1	0,555555556
1	1	1	0	1	1	1	1	0,777777778
0	1	1	1	1	1	0	1	0,666666667
1	1	1	1	1	1	0	1	0,777777778
1	0	0	1	1	0	0	1	0,44444444
1	0	1	1	1	1	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	1	1	0	1	0,666666667
1	1	1	0	1	0	0	1	0,555555556
1	1	1	1	1	0	0	1	0,666666667
0	0	0	0	0	0	0	0	0
1	1	1	0	1	1	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	1	1	0	1	0,666666667
1	1	1	0	1	1	0	1	0,666666667
0	1	1	0	1	1	1	1	0,666666667

1	0	1	0	1	0	0	1	0,44444444
0	1	1	1	1	1	1	1	0,777777778
0	0	1	0	0	0	0	1	0,222222222
1	1	1	0	1	0	0	0	0,44444444
1	1	1	1	1	0	1	1	0,77777778
1	0	1	1	1	0	0	1	0,555555556
0	1	1	1	1	1	1	1	0,77777778
1	1	1	1	1	1	1	1	0,888888889
0	0	1	1	1	0	0	1	0,44444444
1	1	1	1	1	1	0	1	0,77777778
0	0	1	0	1	0	0	0	0,222222222
1	1	1	1	1	0	1	0	0,666666667
1	1	1	1	1	1	0	1	0,77777778
1	1	1	0	1	1	1	1	0,77777778
1	1	1	0	1	1	1	1	0,777777778
1	0	1	0	1	1	1	1	0,666666667
0	1	1	0	1	0	1	0	0,44444444
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	1	0	0	1	0,555555556
1	1	1	0	1	0	0	0	0,44444444
1	1	1	0	1	1	1	1	0,77777778
1	1	1	1	1	1	0	1	0,77777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,77777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	0	0	1	0,666666667
1	1	1	0	1	1	0	1	0,666666667
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	0	0	0	1	0,44444444
0	0	1	0	1	0	0	1	0,333333333
1	1	1	0	1	0	0	1	0,555555556
1	1	1	0	1	1	0	0	0,55555556
1	1	1	0	1	1	1	0	0,666666667
1	1	1	1	1	0	0	1	0,666666667
1	0	1	0	1	0	0	1	0,44444444
0	1	1	0	1	1	0	1	0,555555556

1	1	1	0	1	0	0	1	0,555555556
1	1	1	1	1	1	0	1	0,77777778
1	1	1	1	1	0	1	1	0,77777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	0	1	0	1	1	0	1	0,555555556
1	0	1	0	1	0	1	1	0,555555556
1	1	1	0	1	1	1	1	0,777777778
0	1	1	0	1	1	1	1	0,666666667
1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
0	0	1	0	1	0	1	1	0,44444444
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	0	1	0,666666667
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	0	1	1	1	0,666666667
1	1	1	0	1	1	0	1	0,666666667
1	1	1	1	1	1	1	1	0,888888889
1	0	1	0	1	1	0	1	0,55555556
1	1	1	0	1	0	1	1	0,666666667
1	1	1	1	1	1	1	1	0,888888889
1	0	1	0	1	0	0	1	0,44444444
1	1	1	0	1	1	0	1	0,666666667
1	1	1	1	1	1	0	1	0,77777778
1	1	1	1	1	1	0	1	0,77777778
1	1	1	1	1	0	0	1	0,666666667
1	1	1	0	1	0	1	1	0,666666667
1	1	1	1	1	0	1	1	0,77777778
1	0	1	0	1	0	0	0	0,333333333
0	1	1	1	1	1	1	1	0,777777778
1	0	1	1	1	0	1	1	0,6666666667
1	1	1	0	1	1	1	1	0,777777778
1	0	1	0	0	0	1	1	0,44444444
1	1	1	1	1	1	1	1	0,888888889

1	0	1	0	1	1	1	0	0,55555555
1	1	1	0	1	0	0	1	0,555555556
1	1	1	0	1	1	1	1	0,77777778
1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	0	1	1	0,77777778
1	0	1	0	1	1	0	1	0,55555556
1	1	1	1	1	1	1	1	0,888888889
1	0	1	0	1	0	0	1	0,44444444
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	0	1	0,666666667
1	1	1	0	1	0	0	1	0,55555556
1	1	1	0	1	0	0	1	0,555555556
0	0	0	0	0	0	0	0	0
1	0	1	0	1	1	1	1	0,666666667
1	0	1	1	1	1	0	1	0,666666667
1	1	0	0	1	0	0	1	0,44444444
1	1	1	1	1	0	0	1	0,666666667
0	1	1	1	0	0	1	1	0,55555556
1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	1	1	1	1	0,77777778
1	1	1	1	1	0	1	1	0,77777778
1	0	1	1	1	1	1	1	0,77777778
1	1	1	1	1	0	0	1	0,666666667
1	1	1	1	1	0	0	1	0,666666667
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0	1	1	1	1	1	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
0	1	1	1	1	0	0	1	0,555555556
1	0	1	1	1	0	0	1	0,555555556
1	0	1	0	1	0	0	1	0,44444444
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0	1	1	1	1	1	1	1	0,77777778
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1	0	1	0	1	0	1	1	0,55555556
1	0	1	0	1	1	1	1	0,666666667
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1	1	1	0	0	0	1	1	0,55555556
1	1	1	1	1	1	1	1	0,888888889
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1	0	1	0	1	0	0	1	0,44444444
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1	1	1	0	1	1	0	1	0,666666667
1	1	1	0	1	1	1	1	0,77777778
1	1	1	1	1	0	0	1	0,666666667
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1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	0	1	0,666666667
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1	1	1	1	1	1	0	1	0,777777778
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889

1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
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1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
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1	1	1	1	1	1	1	1	0,888888889
1	1	1	0	1	1	1	1	0,77777778
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1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	0	1	1	0,777777778
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
1	1	1	1	1	1	1	1	0,888888889
0	1	1	1	1	1	0	1	0,666666667
1	0	1	1	1	1	0	1	0,666666667
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