

Exploration of Business Model of Dress Shirts Web Tailoring in China under the Influence of ICT

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ABSTRACT

Based on the discussions of Chinese shirts consumption and consumer's demand escalation, this article has made the exploration of business model of web tailoring shirts supply in China. The marketing position and service strategies of eleven such kinds of Chinese suppliers from Tmall.com, the China's largest retailing platform, are analyzed. Some comparisons with US, UK, and India's similar shirt web tailoring suppliers have explained with hints seeking discussion. For better matching to such new supply mode, to setup a flexible apparel production line is needed and details of those needs are provided in terms of production and management aspects. Additionally, we will discuss how the successful use of ICT has helped some international companies to move into higher-value activities such as design and logistics, or to access niche markets. This will also demonstrate the strategies available to the developing companies to improve their business models.

KEYWORDS: dress shirts, web tailoring, business model, body measuring service, flexible apparel production, ICT

1. INTRODUCTION

China produces huge quantity of shirts and export heavily to international markets, but the economic benefits of such production and exports are not so good. As one formal Chinese commerce department leader mentioned that China exports 800 million of shirts can only get return of an Airplane of A380, from each shirts, Chinese manufacturing firm averagely gets USD 0.35 (equivalent to RMB2.89 in 2005)[1]. Therefore, Chinese textile and apparel industries are seeking the way of improving economic returns. In the era of rapidly growing technology, Information and Communication Technology (ICT) has an important role to play as developing countries adjust to the new era in various business. Firstly, ICT not only improve the business practices but also increase the efficiency and competitiveness of developing country industries. Secondly, ICT is considered to be the main driver that shifts value along the value chain, disaggregating production chains, and creating new opportunities for developing countries in the global supply chain. Recently there is rise of an emerged model of web tailoring supply, which matches the customers' demands escalation, and some of them are operated quite well, and some of them are failed with big losses. So this article wants to make some exploration to such new business model, and also discuss some needs for setting up flexible production line to match such model [2, 3]. Additionally, we will discuss how the successful use of ICT has helped some international companies to move into higher-value activities such as design and logistics, or to access niche markets. This will also demonstrate the strategies available to the developing companies to improve their business models.

2. Apparel and Shirts consumption in China

The global textiles and garments industry forms an important component of world trade flows, particularly for some developing and least developed countries where clothing accounts for a large proportion of total exports. China's fiber consumption reached globe average level in 2006, which was approximately 14 kg per capita, and reached 18 kg in 2010. Whereas advanced countries' per capita level was 30 kg in the same year [4]. As China's great number of population, the predicted data of China's whole apparel consumption is approximately 1.685 trillion RMB, equivalent to USD 276 billion. In 2014, average city and town people consumes RMB 1,916 (USD314) per capita, whereas countryside people consumes RMB 599 (USD98), which are based on Shanxi Province in 2014 summer statistics as average representative for whole country[5]. Trade patterns in textiles and garments are similar although textiles tends to be a capital-intensive business, while garment-making is labor-intensive and usually relies on a low-cost workforce. For textiles, the European Union is the biggest exporter (if including intra-EU trade), followed by China. However, India, Turkey, Pakistan, Indonesia, Thailand and Mexico all rank among the top 15 textile exporters, according to WTO trade statistics. Overall, Asia accounted for 45.1% of world textiles exports in 2004. The EU and the US are the biggest importers of textiles, followed by China, which needs fabric for its large

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garments industry. Overall, Asia accounted for 46.8% of world clothing exports in 2004. According to Shanghai Garment Company's investigation in 2005, shirts consumption is approximately 18.8% of all apparels, so the predicted consumption of shirts in 2014 in China is about RMB 316.5 billion equivalent to USD 51.9 billion. If average price of shirts is about RM50, then there would be 6.33 billion pieces in total, divided by whole population of 1.34 billion, each Chinese consumers is about 4.7 pieces per year averagely.

As living standard in a community increases, consumers have increasing interests to have some of their apparel be tailor making for more fitting. There are several reasons for this including the fact that tailor made dress shirts really allow them to express their true identity and wear something that fits their body perfectly. Usually bridegrooms go to tailor making shops for their wedding suits, also there have been increased numbers of customers having intentions to tailor making their suits to attend formal events. According to recent report, some experts estimate that tailor making apparel requirements in China are approximately RMB 300-500 billion in which shirts segments are about RMB 60-100 billion yearly [6, 7].

3. The growth of shirts web tailoring suppliers online and the role of ICT

It is the flow of information that binds together the textile and garments supply chain, and ICT is the means to perfectly achieve efficient information sharing. Appropriate technology can enable a supplier to improve business practices, increase efficiency and competitiveness, and to meet the ever-shorter lead-times required. The ICT has influenced the rapidly increased number of internet users as well as stimulated by customers' demand, there have been great number increases of dresses' web tailoring shops. And shirts tailor making is a new emerged segment in apparel industry, which has developed with suit tailor making, and greatly become as independent supplier, because of shirts' styles are relatively easy to be standardization. In China, Shanghai and other main city people are still having the memory of PPG's efforts in shirts web retailing, which had some venture capital support and once was regarded as number one largest shirts supplier in 2006. After PPG's story, there have been booming in web retailing for apparel, main web platforms to sell shirts are as shown in Table 1.

Table 1: The main web platform to sell shirts in China.

<i>Taobao</i>	<i>Tmall</i>	<i>Jingdong</i>	<i>Weipinhui</i>	<i>Yihaodian</i>	<i>Maikao</i>	<i>Vancl</i>
<i>taobao.com</i>	<i>tmall.com</i>	<i>jd.com</i>	<i>vip.com</i>	<i>yhd.com</i>	<i>m18.com</i>	<i>vancl.com</i>

All the e-commerce sites above sell shirts, but shirts tailoring suppliers are mostly concentrated on Tmall.com, the Chinese largest web retailing platform, and the main suppliers and their characteristics of customized shirts are shown in Table 2. Four points can be analyzed from Table 2.

i) **Price analysis:** The price of Jieshimai is the lowest, from 99 to 149 RMB (16-24 USD) per piece. This company focuses on the group of college students, and provides them customized shirts for their job interviews. As we can see, it clearly targets the low-end market segment. On the other hand, the highest price is in Longqingxiang, as high as 6,688 RMB (1096 USD) per piece. And the other two suppliers, Ushan Bespoke and Saint Angelo, also offer the price over 2,000 RMB (328 USD) per piece. More specifically, Ushan Bespoke has a larger price range, while Saint Angelo only focuses on the high-end market of the price above 1,500 RMB (246 USD) per piece.

ii)

Table 2: The main suppliers and their characteristics of customized shirts in Tmall.com.

Sr. No.	Supplier	Price (¥/\$)	Deliverytime (day)	Ordering process				Detailed body measurement guide
				Self-service	Online time service	Real service	One-on-one	
1	IWODE	198-998/32-163	14	-	√	-	√	
2	I.D.S	158-398/26-65	7-10	-	√	-	√	
3	Mono Formal	219-299/36-49	7	√	-	-	√	
4	LONQN	298-788/48-128	15	-	√	-	√	
5	Baaler	295-336/48-55	7-10	-	√	-	√	
6	Ushan Bespoke	598-2698/97-440	10-14	-	√	-	√	
7	Jieshimai	99-149/16-24	7	-	√	-	-	
8	Longqing xiang	588-6688/96-1091	-	-	√	-	-	
9	Yuanxiang	200-278/32-45	14	-	-	√	√	
10	Saint Angelo	1580-2280/258-372	14	-	-	√	-	
11	Collectrouge	349/57	7	-	-	√	-	

*All the web links of Table 2 are given in Appendix A.

iii) **Delivery time analysis:** We can see from Table 2 that the shortest time is 7 days, and the longest is 15 days. There are 7 suppliers whose delivery time is over 10 days. The logistic time in China is usually about 2 or 3 days, so we know that the time spent on the production process is 7 or 8 days. And the suppliers targeting on high-end market may need 2 weeks for their delivery time.

iv) **Analysis of customization process service:** There is only one supplier, MONO FORMAL, of all the 11 shirts customization suppliers, that can totally let customers complete the ordering process by web computer system with no need of supplier's web real time customer service. And 7 of them guide customers to measure and order online, which obviously needs to input more human resource, but it helps to place orders and improves the quality of ordering and customer satisfaction. And the remaining 3 suppliers offer the higher form of service, that is, sending staff to customers' place or invite them to the local store to measure the size, which costs more and requests more in hardware (e.g. store arrangement).

v)

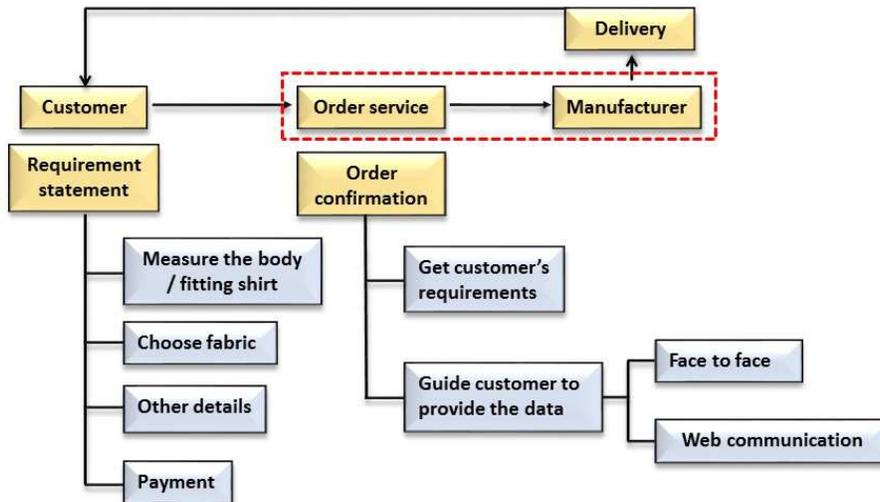


Figure 1: Block diagram of the procedure of buying the custom tailoring shirts.

vi) **Analysis of online measurement guidance service:** Among all the 11 shirts web tailoring suppliers, 6 provide online measuring software with the form of pictures and videos. Especially, what MONO FORMAL offers is the most user-friendly among all of the suppliers. What's more, it can reduce human resource input, and it may indicate the direction of development in the future and play an important role especially in cross-region (country) business.

vii)

4. Explanation of typical functions of shirts web tailoring model in China

According to above information provided by the shirts customization suppliers on Tmall.com, the authors summarize it into the following model and describes the relevant details in the following block diagram (Figure 1).



Figure 2: Chart diagram of (A) online selection of fabric materials, (B) measurement of a shirt, (C) style of a shirt, and (D) Payment mode of a shirt.

In the view of authors, the most representative model of dress shirts customization supplier in Tmall.com is IWOODE, and its custom procedure is introduced in the Figures 2. In the first step, the customer has to choose the fabric (Figure 2A). The different material of fabrics, with various color options and combinations are mostly available in the sites. In some cases, after choosing your right material, the customer can demand for the swatches. Some companies post swatches, free of charge while some may charge a small amount of money. After choosing the right material for the fabric, next step is to take the body measurements, which is considered to be the most important step to obtain the shirt with accurate fittings, as per demands of customers (Figure 2B). Online sites have pictorial guides and videos which describes the simple and accurate method to take the body measurements. Some sites encourage the customer to take the size from professional tailors. And some help to post the sample measuring shirts also. As per IWOODE, there are three ways of measurement as described in Figure 2B. The next step is to choose the style (Figure 2C). Here customer may choose the style of shirts on the web page. Or they choose DIY, to

choose types of collar, cuff, pocket, pleat, hem and buttons from the given options. The final step is the payment (Figure 2D). After inputting the color and style as well as the measurements, customer has to confirm the order and then have to make online payment.

5. The hints from other international shirts web tailoring suppliers

Next is the comparison of some international brands which are successfully offering online custom tailored dress shirts from last few years. Table 3 describes the world’s top seven custom tailoring shirt’s companies and their important features. The companies offer their services in a number of innovative ways, and provide their services globally all around the world.

Table 3: World’s top 7 custom tailoring shirt’s companies and their important features.

Sr. No.	Company name		Price range (USD)	Special features			
				Available Languages	Making & shipping time (weeks)	Ordering process	Measurement guide
1	ALTON LANE(USA based)		89-385	English	4-6 weeks	Online	Available
2	HARRY SUITS(India based)		79-345	English	2-3 weeks -	Online	Available
3	Modern Tailor -The art of tailoring(USA based)		20-170	English, Chinese	French, 2 weeks	Online	Available
4	Blank Label(USA based)	95-95	English		2 weeks-	Online	Available
5	Black Lapel(USA based)	99-129	English		5 weeks	Online	Available
6	STUDIO SUIT(USA based)		34-68	English	2-3 weeks	Online	Available
7	Tailor4Less(UK based)		55-77	English, Spanish, Italian, Russian	French, Dutch, 2 weeks--	Online	Available

*All the web links of the Table 3 are given in Appendix B.

The service analysis of these world’s top seven companies is summarized in following points.

- i) In terms of prices, some companies offer a wide range while some are restricted to one price. The company “Modern Tailor -The art of tailoring” provides a wide range of prices (20-170 USD) depending upon the type and color of fabrics, which covers a wide range of customers.
- ii) Second most important point is the delivery time. Every company needs at least two week, but some even need more time. The company “The blank label” provide quickest delivery services with additional charges. But the price range for their shirts is too limited (just one price of USD 95).
- iii) Other features like measurement guides, few companies gave customer appointment and all of them have user friendly online measurement guide. Customer can provide additional information as well as post the sample shirts and pictures.
- iv) These companies also provide online tracking records and customers can modify their orders. And upon receiving can do some alterations and remaking also.

In short, “Modern Tailor -The art of tailoring” provides a wide range of pricing with various quality of fabrics. It has optimum time for delivery of the prepared products. From Table 3, higher mode of price data is 80-100 USD and lower mode is about 60 USD, which give the price hint for international players in this field. Additionally, their user friendly design for ordering and measuring system is the key features for common.

6. Comparison of two models and the needs of flexible production line for new model

Table 4 provides a deep insight of traditional and new models in shirts production and management which are being used by different companies. Also the new requirements, which are related with flexible production and management for new shirts tailoring model, have been described briefly in the table.

Table 4: Comparison of two models with the new requirements of flexible production line of new model (web tailoring supply).

Features	Traditional model	New model	New requirements
Fabric purchasing	Large quantity	Small quantity	Need to set up a quick response system with suppliers to offer small quantity of fabrics
Warehouse management	Large quantity stacking	Small piece put on shelves	Need more capable precisely computer management software
Production line material supply	Large bulk arriving	Small piece	Need special turnover plate or cart, need more workers for material supply to individual working positions
Design	Designing first	Getting customer needs first, then making design	Need to have a computer based designing bank, which can support fast design process and provide technical instructions quickly
Cutting	Large quantity, use paper pattern	Automatic tailor cutting machine	Need to equip such new facility, and training operators
Sewing	Flow line production	Circle line production	-
Buttoning	Same in large quantity	Small quantity in deferent items	Precise supply to special worker position just in time
Finishing and packaging	Line packaging, few categories, and standard pieces for package	Single or small quantity, may need to put accessories	Special printing machines and materials needed for individualized offering.
Quality management	Sampling inspection	Self-inspection	Need to indicate the specifications on working position, RFID attached chips
Transportation	Package boxes with few destinations	Single piece or small quantity	-
Worker training	Single working position	Multiple working position	-
Production line management	Focused on shift and quantity	Focused on production team and quality	More attention to conformance to requirements

Undoubtedly, in order to improve efficiency of such new model of ordering and production, there are needs to develop special production equipment, pattern, fixture and tooling, suspending transportation system, easy use display screen in working position and related software, and so on. Therefore this production development provides the opportunity for machine and tooling suppliers, meanwhile textile and apparel manufacturing experts are needed to make research in above aspects for flexible production, and international cooperation may also be needed. Chinese Yueda enterprises, based in Yangcheng City, Jiangsu province, produces high quality fabrics with dyeing cotton yarns of specification 100 counts, which cooperated with a tailor making supplier, Bosiman garment company, based on Changzhou city, Jiangsu province. Bosiman successfully developed a tailor making supply line, provided high quality man's dress shirts(for business occasion use, 100 counts full cotton dyed fine yearn fabric) in production cost about 20 USD per piece, which is sold about 500 RMB normally in Chinese retailing price.

8. Some discussions to push forward this kind of model under the

Within a company, ICT can provide a detailed tracking mechanism so that the progress of an order through the production line is accessible in real-time. Bottlenecks can be solved, and efficiencies are much improved, which integrates order processing, materials sourcing, manufacturing, account handling, and logistics. Customers can then be given reliable progress reports on order schedules, and productivity greatly enhanced. Communications between a supplier and a customer can similarly be transformed by electronic communication, either through a dedicated Electronic Data Interchange (EDI) or on a more flexible web-based system. Documents such as Purchase Orders are easily set up online, thereby reducing costs and avoiding mistakes. Replenishment orders, price checks, availability inquiries and stock checks can all be handled through EDI or an equivalent internet data exchange system. When fully connected, this allows buyers can help themselves to information, so that they do not have to wait for a supplier in another time zone to respond. Orders can be placed at any time, on any day of the week. The introduction of ICT can enable a firm to offer an integrated "full package" service, but it also provides new opportunities to capture emerging niches in a disaggregated value chain. For instance, the wide range of ICT applications already in use within the textiles and garments industry encompasses everything from advanced Computer Aided Design (CAD) and virtual prototyping packages, to the online handling of routine customs and export bureaucracy. It is possible to connect every stage of the whole value chain electronically, and for large commodity suppliers this can bring big advantages. But developing country suppliers often face a number of hurdles in selecting and

implementing a useful ICT system. Many other factors need to be assessed in order to produce a successful ICT strategy. A slow, unreliable internet connection at a factory in Africa, for instance, may mean it takes hours to download a detailed electronic specification-yielding frustration rather than any savings.

1) Pay more attention to value proposition

A value proposition is a promise of value to be delivered and acknowledged and a belief from the customer that value will be appealed and experienced. A value proposition can apply to an entire organization, or parts thereof, or customer accounts, or products or services. Concerning the shirts web tailoring supply model, main value is the fitting of shirts, meanwhile costs should be controlled within reasonable scope.

2) Price Decision

As the Figure 3 indicates the situation of prices appeared in the web globally, some suppliers position high price spectrum, even some price is extremely high, say 1096 USD, whereas some suppliers offered to lower price spectrum as only 7 USD. We believe that those price offers are mostly related with their marketing strategies. From all the information we got for this paper, two price decision points (levels) could be discussed as following according to authors understanding of Chinese markets:(i) Decision point (level) one: is the lowest price that suppliers can afford to offer, based on Table 2 and Table 3, this point should be no less than USD 30 for normal business situation in China markets. (ii) Decision point (level) two: is the price level that customers are willing to pay for it with meaningful numbers for suppliers, of cause such point (level) is flexible to increase or decrease according to different market situations and product offering, also based on Table 2 and Table 3, this point should not more than USD 100 in China markets. In short, such shirt web tailoring supply in the scope of USD 30 to USD 100, would have good potential in future.

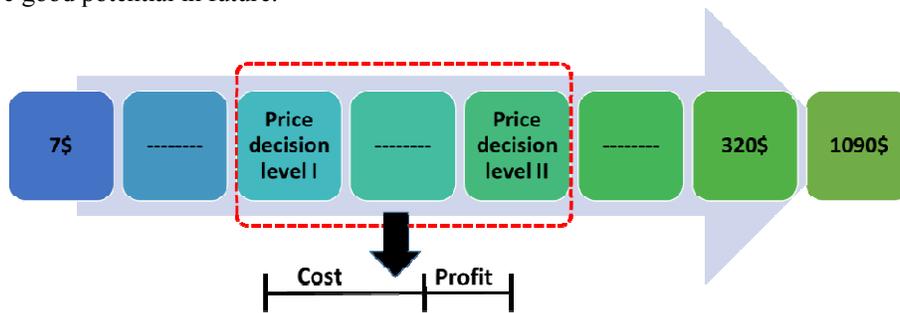


Figure 3: Price Discussion of Ongoing Suppliers in world scope

3) Cost Structure

As price is determined by markets, especially inference by competitors, if shirts web tailoring suppliers want to be survived and develop well, the cost control is their main concern. Based on our research, a shirts web tailoring supply cost structure is provided as follows in Figure 4.

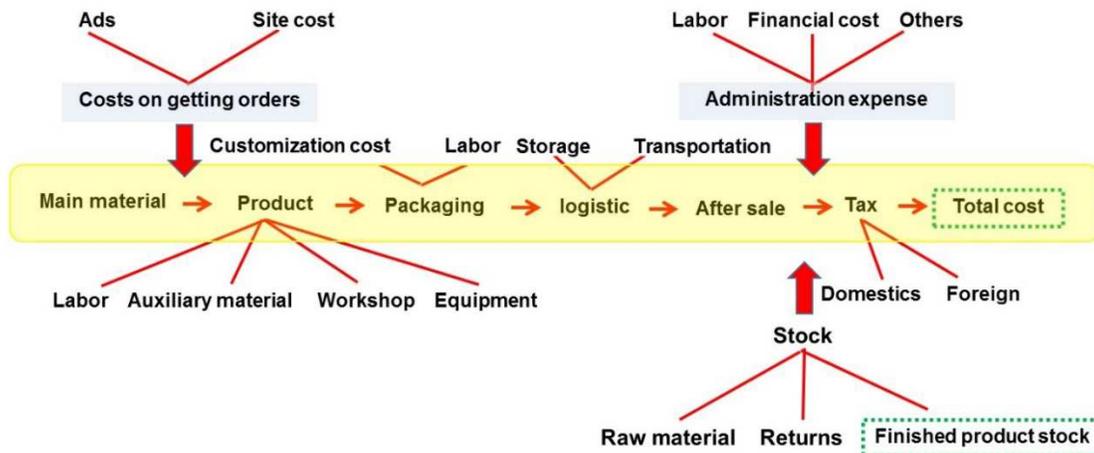


Figure 4: Cost structure of shirt web tailoring supply model.

Among all factors of the cost structure of Figure 4, fabrics, getting orders and production are main costs. Whereas stock costs are also important for such model's success, which is a typical advantage for new model for manufacturing suppliers in Chinese apparel industry. All those four factors are discussed following.

4) *Fabrics choosing*

Shirts web tailoring suppliers need to guide customers to choose relative high ends of fabrics, such as high percentage of cotton or wool fabrics, which is usually in higher counts (say count 100, or above, more fine and comfortable), otherwise, for low ends of fabrics, that are full of in supermarkets, are less meaning for customer making tailor ordering.

5) *Production*

Production costs could be greatly reduced by developing modern flexible production line, with effective computer software, which is discussed in previous section of this article.

6) *Getting orders*

Concerning to get orders, it is critical for suppliers, nowadays in China, the cost of using web media to express information to customers is also very high, so smart solution to get customer orders is a challenge for suppliers. Here we would like to propose a combinatory method, to develop an innovative instrument for this issue.

In Chinese market, there is a shirts web tailoring supplier, Jimbrothers.net, which has developed an innovative digital imaging technology, and this technology can quickly calculate the body size on the basis of the front and back photos uploaded.

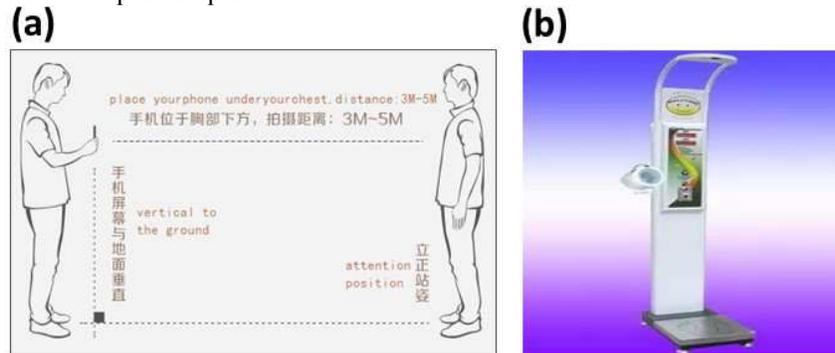


Figure 5: (a) Suggested way of shooting by Jimbrothers.net. (b) Measuring body specification tool in hospital.

Also there is a present measurement tools in hospital of China, to measure people's weight, heights and blood pressure, which is shown in Figure 5b.

The authors of this article are thinking about a combinatory method to solve the issue of measuring body sizes. The Jim brother's measuring method could be vertically fixed to the upper side of hospital's measuring tool and a special 3D photo-math converting software could be developed out, and some charged and information output and transformation functions could also be added. So with such technology, shirts suits tailoring suppliers can put such kind of measuring tools in public occasions, such as supermarkets, subway stations and restaurants and so on, then this kind of measuring and ordering tool can greatly improve the process of web tailoring suppliers ordering processes.

7) *Unique Advantage in stock issue*

As stock issue is one of the key factors caused failures most Chinese apparel suppliers in traditional model, whereas tailor ordering supply model is ordering first and production second, it could greatly reduce such inference of stock issues, which is unique advantage for this model. Now, to develop a quick response fabric supply system in small quantity and guiding the customers to several main fabrics therefore to increase purchasing quantity of fabrics become new concerns for such suppliers. Meanwhile up and downstream cooperation in textile and apparel production is greatly encouraged to face this new customer trend.

8) *International cooperation and future prediction*

As China has developed quite good fabric manufacturing capacities, for such kind of shirts or suits web tailoring suppliers' development, international cooperation between China and other nations, especially in Europe region, has

obviously advantages of geographic location and customer relationship. Such cooperation needs to be dig further by textile and apparel experts in China and Europe.

Concerning future prediction of such model, people may think about the cases of Alibaba's taobao, which is the largest web retailing provider in China, and other Chinese largest OTA provider Ctrip.com. Those two cases indicate the internet's great power, so we may expect shirts web tailoring supply could be also have a great development future.

Summary

This article points out that shirts web tailoring supply is a new segment of apparel web tailoring industry, which has been stimulated by customers demand escalation. Shirts web tailoring suppliers from China, US, as well as other countries have shown the common attentions to body measuring technology in web, meanwhile off line customer service support and on line customer services are seen as the trend, especially from China market. The keys to the success of this model is to propose right value proposition, whereas suppliers' main efforts in cost reduction efforts are to choose proper fabrics supply, reduce the costs of getting orders, and to invest flexible production line. By taking advantages from ICT and by developing some innovative measuring body instrument or tools with ordering function could be as new development topic in R&D. International cooperation in production and marketing for shirts web tailoring supply is also a meaningful topic for China and Europe firms as well as for both parties' textile scholars and experts.

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Appendix A

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Appendix B

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