

# Marketing Communication Strategy for International Fashion Retail Brands after COVID-19

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**Abstract**—This paper mainly studies the impact of COVID-19 on the marketing communication strategies of international fashion retail brands and how to adjust their marketing communication strategies after COVID-19. This study mainly uses secondary literature as research materials. Meanwhile, case studies are conducted to precisely understand the impact of COVID-19 on the marketing communication strategies of international fashion retail brands and their weaknesses. According to the research, we found that the marketing strategy of international fashion retail brands has been unable to match customers' expectations, resulting in inefficient marketing communication. Therefore, we believe that international fashion retail brands should re-evaluate their marketing communication strategies according to the changes in macro and micro market environments. Increase revenue and market share by building e-stores and online social networking platforms to deliver brand value to customers more effectively and attract customers.

**Index Terms**—Marketing communication strategy, international fashion, Retail brands, COVID-19.

## I. INTRODUCTION

### A. Research Background

The COVID-19 pneumonia epidemic has been circulating for nearly two years and has changed the global market's dynamics, including the fashion retail markets. For the international fashion retail brands, the challenges they face will be diversified, such as in different countries or areas of the policy and economic situation change and the market environment change. These changes may cause consumer behavior and psychological demand changes, thus threaten the companies' survival and development. So, international fashion retail companies need to adjust their marketing strategies to meet their survival and development needs. They need to consider (1) how to consider the customers' demand change and to react to the shift in consumption, (2) how to formulate the strategic deployment between different regions, (3) how to change the marketing communication strategy to deliver the correct value to customers and let them accept it, (4) how to find external supports and achieve sustainability goals [1].

Insiders and researchers in the fashion industry say the COVID-19 pandemic has had and will continue to impact industry development and business models [2]. According to the 'Annual Conference Report 2020' from the International Textile Manufacturers Federation (ITMF), between the second quarter and the third quarter of 2020, average orders

and expected turnover fell by 42% and 32%, respectively. Moreover, some international fashion retail market giants have also been affected. For example, from March 1 to May 6, H&M's total sales were down 57 % year on year, but online sales were up 32%; ZARA also showed a similar trend, which in the first quarter of 2020, 50% of its global stores were closed and sales fell 24.1 percent year on year. GAP, another fashion giant, has launched its Old Navy company due to the epidemic in many countries.

Therefore, the companies which aim to in front of this extraordinary market situation may have to consider how to through the perspectives of globalization and Integrate Marketing Communication (IMC) to enable them to have a sustainable competitive advantage by accessing unique, costly-to-copy, and rare resources. This article will be based on globalization and integrated marketing communications, then refer to the recently published academic papers, industry magazine articles, company reports, related industry reports and combined with actual case analysis. It can adapt to the current market situation of the world's fashion retail companies' marketing communication strategy, meanwhile predict the future development trend of the marketing communication to help enterprises obtain a sustainable competitive advantage.

### B. Literature Review

Development trends, the current situation of the fashion retail industry, and the impact factors of COVID-19.

Based on the global impact of COVID-19, the high global unemployment rate spikes changed the consumer behavior patterns, which makes the consumers less likely to spend on fashion products and pay more attention to the classic designs, and the value-conscious [1]. The change in Consumption Patterns forced fashion companies to adjust their strategies. The first is online shopping. According to 'Business of Fashion' [3], many consumers have tried a new brand, or Shopped online for the first time during the crisis, which means digital marketing communication is also mainly instrumental for consumers' purchase decisions [4]. The following is sustainable development. According to a survey, consumers want fashion-related companies to act more environmentally friendly and take more social responsibilities [5]. International fashion retail companies still need to consider the change in consumer demand. More people may care about the shopping experience instead of products [6], and increased consumer awareness of healthy lifestyles and products' cost performance and quality [1].

### C. Research Gap

According to the study in this field, most researchers focused on how to improve the marketing strategy of fashion retail companies from the perspective of functionality, i.e.

supply chain, including cost advantage through the integration of upstream supply chain, and product sales and promotion advantage through the integration of downstream supply chain (distribution channel) or direct sales. However, few researchers have focused on fashion retailers' marketing communication strategy to attract consumers and realize the value delivery during and after the COVID-19 pandemic. Some researchers did pay attention to the impact of COVID-19 on the marketing communication strategies of the retail industry but did not specifically focus on the international fashion retail industry. Therefore, this study aims to analyze the marketing communication strategy that the company should adopt and the development trend in the future by studying the current international fashion retail market situation and future development trends of the international fashion retail industry.

#### *D. Research Framework*

This study will follow these specific steps: Firstly, it will analyse the current situation of International fashion retail industry and determine the available resources for the companies to implement marketing communication strategy through efficient marketing mix analyses; Secondly, it will focus on to analyse the impact and core influencing factors of COVID-19 on consumer psychology, consumer behaviour, purchase choices and decisions; The third part is through two international fashion retail-related cases to analyse the effectiveness and validity of marketing communication strategies which implemented by the companies in the context of COVID-19; The fourth part will be based on the above analyses to provide the marketing communication strategy that the companies should adopt in such unique situation, and predicted the future development trend, so that may help companies lay out their long-term/sustainable marketing communication strategy; The last part will present the limitations and future study of this research.

## II. METHODOLOGY

### *A. Literature Analysis*

The international fashion retail market is a professional market with a large scale and span, and it is usually tricky to collect primary data. Therefore, secondary data include annual and quarterly reports of international institutions, statistical reports from relevant organizations, and recent academic papers, journals, and magazines. It will be used to study, analyze, and predict the development status of the international fashion retail industry and consumer behavior to provide a theoretical basis for possible marketing communication strategies for international fashion retail companies. This approach anticipates that this inductive process would better understand the subject and lead to subsequent research [7].

### *B. Case Study*

Two international fashion retail-related cases will be analyzed, which are ZARA and Brandy & Melville. The companies were selected based on their broad similarities (product categories, marketing strategies) and specific differentiation (target customers, advertising strategy, market segmentation). Both fashion retail companies have been

affected by the COVID-19 pandemic, including widespread store closures worldwide, a sharp drop in marketing revenues, deep job cuts in some regions, and even the withdrawal of their sub-brands from some local markets. However, their specific operation strategies are different. Although the overall sales volume of one sales channel declines, the revenue of some sales channels (such as e-store) increases sharply and is still popular among consumers. The other shows the opposite trend. By studying the similarities between the two companies, we can better understand the major crises faced by international fashion retail enterprises. By studying their differences, we can present more effective marketing communication strategies by comparison and provide the factual basis for proposing better and more predictable marketing communication strategies

### *C. ZARA*

ZARA is an international fashion retailer based in the American market, providing low and medium-price products, including clothes, shoes and hats, accessories. The main target customers are young women in the middle and low income or students and provide part of men's wear and children's wear. The company was founded in the late 1960s and had five sub-brands. Until the COVID-19 pandemic, the company had an objective global market share and ranked 199th on the 2020 Fortune 500 list. However, due to the influence of its own inappropriate marketing communication strategy and changes in people's consumption behavior, its market share has shrunk dramatically. However, due to the development of information technology, ZARA also began to pay attention to online marketing through social media platforms to achieve direct communication with customers. It can improve the speed and ability to obtain information, understand customers' needs and preferences faster and launch more targeted marketing strategies. Online marketing will also become the primary development trend of ZARA in the future.

## III. RESULTS

### *A. Background of International Fashion Retail Market*

COVID-19 has changed the pattern of the international fashion retail market, which changes in upstream supply chain and downstream distribution channel, as well as internal and external changes of companies and consumer behavior changes. Thus, the PESTLE model can analyze the international fashion retail market's macro-environment (market background). Then, the IMC (integrated marketing communication) can evaluate companies' performance through a micro-environment perspective.

According to the 'McKinsey & Company Report 2021' [8], the fashion retail industry is moving towards digital channels, and customers are becoming more focused on brand equity and social justice. From the data provided by the 'McKinsey Global Fashion index', the profit of the global fashion industry declined by 93% in 2020. It has visited a devastating impact on business and jobs.

During the COVID-19 pandemic, the international fashion industry experienced supply chain delays due to lockdown policies in various countries, especially deadly for fast

fashion brands that rely on seasonal products. [1] For example, in March 2020, because of the merchandise exports to many countries and regions in the world are detected virus, China, India, and other significant products producer also due to the severe domestic epidemic implemented strict controls on goods import and export. Suppliers can not generally operate to the international fashion brand (ITMF, 2020) [9], and thus influence brand in international operations. Furthermore, the quarantine policy has also impacted and challenged the operation of offline stores [10]. From the perspective of the economy and society, companies are subject to COVID - 19 outbreak caused by the global economic recession; it is challenging for them to ensure liquidity [9]. Meanwhile, global unemployment soared, consumer income is expected to reduce the purchase intention of fashion products; this will also be on the international fashion retail brand marketing strategy have a significant impact [10]. There still are opportunities for international fashion retail companies in such a situation, which is the advanced Internet technology. Before the COVID-19, E-stores have already attracted the attention of some companies. For example, in 2018, e-commerce sales accounted for 14.3% of the total annual global retail sales [4]. After the COVID-19, retailers' focus on digital strength increased by 76% (McKinsey Global Fashion Index) [8]. Moreover, virtual reality and mixed reality technology development also provide new development opportunities for offline stores. Sustainable development is also an important trend in the wake of COVID-19. As a common recognition, the fashion industry consumes many resources, while the awareness of environmental protection and sustainable development has an increasing influence on consumers' purchasing behavior. Therefore, a circular economy will become the development direction of the fashion industry in the future [11].

### *B. Case Study of ZARA Marketing Communication*

ZARA is part of The Spanish INDITEX group, founded in 1975 by Amancio Ortega, and it was also a leading fashion brand in Spain and globally until 2019 [12]. As a fast fashion brand, ZARA's brand characteristics and competitive advantage lie in achieving efficiency through global business chains (from inventory management to distribution channels) [13]. Therefore, ZARA can provide consumers with the latest fashion design of the facility brand at a low price [14].

Before COVID-19, ZARA's primary business model gradually expanded from local to global business and paid more attention to offline store business. By 2019, ZARA has opened 2,213 offline stores in 93 countries and regions around the world. By marketing offline stores, ZARA has continuously opened up new markets and expanded sister brands in existing markets in the past ten years to strengthen the combination advantages of offline stores [15].

ZARA also started online marketing before COVID-19, but its primary sales channel is still offline. According to Facebook statistics, ZARA's primary target customers are young women, and nearly 30 million people like and follow ZARA's official Facebook page (the ZARA official Facebook page) [16].

During the COVID-19 pandemic, the offline shopping experience that ZARA relies on has been hit hard. According

to The company's earnings report, profit in the first quarter of 2020 dropped 44% year on year, with a net loss of \$482 million. Meanwhile, INDITEX, ZARA's parent company, also announced closing 1,009-1,200 stores worldwide. In contrast, online sales are up -- ZARA's online sales were up 50% in the first quarter of 2020 compared with the same period last year -- but even that cannot undo the damage done by offline stores (the Inditex official website) [17].

Amancio Ortega said the INDITEX plans to cut ZARA's 1,200 offline stores over two years and invest 2.7 billion euros to build an online digital business. It shows that ZARA's market strategy has gradually shifted from offline to online and realized faster product delivery and real-time product information tracking through the combination of online and offline marketing modes. Thus online communities and social media will also become an important way for ZARA to achieve its marketing communication goals [12].

### *C. ZARA's Problems with Marketing Communications*

During the COVID-19 communication period, ZARA's marketing communication strategy did not achieve sufficient market growth. Prior to March 2020, ZARA's market value exceeded US\$17 billion, but after the COVID-19 outbreak, ZARA's market value plummeted to US\$14.8 billion, a loss of almost 13% of the brand value based on data from the official Inter-bands website [18]. The main factors contributing to this problem include the following three aspects.

Firstly, due to the COVID-19 explosion, the reasons, products and ways of shopping have changed dramatically, with consumers' shopping priorities focusing on meeting basic needs, including hygiene, cleaning and necessities. In contrast, demand for non-essential items such as fashion products has fallen dramatically. Based on statistical data, more consumers are more likely to meet their basic needs during COVID-19, i.e. more willing to spend money on personal health (78%), family and friends' health (80%), food and medicine (37), as well as personal safety (31%) and property security (42%) [19]. The fashion retail brands represented by ZARA, on the other hand, are more likely to meet the work, psychological and social needs of consumers with a diversified product model of low prices, design and short cycles, corresponding to Maslow's Hierarchical Theory of Needs, where fashion products aim to satisfy the respect needs (Esteem needs) and self-actualization of the target customer by selling high-end fashion at low prices. Esteem needs and Self-actualization needs are the high-level needs of the target customer. Therefore, the mismatch between ZARA's product sales objectives and consumer behaviour and patterns under the influence of COVID-19 resulted in lower marketing revenues.

Secondly, during the COVID-19 outbreak, the shift from offline to online shopping activities due to the various bans imposed in various countries led to a year-on-year increase in domestic retail e-commerce of between 60% and 90% in all countries the world. Based on a report by the MasterCard Institute for Economic Research, global incremental consumer online retail spending reached US\$900 billion in 2020, and the share of e-commerce is expected to shift permanently to total retail sales (around 70-80%) even after

the end of COVID-19. In addition, the number of shops frequented by consumers is growing across the globe, with countries/regions such as Italy and Saudi Arabia experiencing an average 33% increase in the number of shopping sites for their residents, followed closely by Russia and the UK at 29% and 22% respectively. However, ZARA's zero-advertising marketing strategy, which relies heavily on offline shop sales and experiential marketing to attract consumers, has led to a decrease in the effectiveness of ZARA's marketing during COVID-19 and the lack of proactive merchandising, which makes it difficult for customers to access relevant information about fashion products. The lack of online marketing also made it difficult for ZARA to collect its customers' latest needs and target them, resulting in a fragmented customer relationship. The increase in the number and variety of online shops will also lead to a loss of customers and thus threaten ZARA's profit growth.

The third point is that ZARA's primary target group is millennials aged 24-40 years old. According to surveys before the explosion of COVID-19, they were more willing to spend more on groceries, restaurants, smart devices, personal hobbies and clothing, and 69% of millennials bought clothes for reasons beyond basic needs while spending far less on health and medical care than older generations. However, following the explosion of COVID-19, millennial spending has decreased by an average of 5-7%, and statistics show that 53% of millennial households have children in the US alone, meaning that their household spending mix will be more towards necessities than personal preferences and fashion products and that more cost-effective and classic clothing will be the primary preference of millennials. ZARA's current marketing and communication strategy is still based on fast fashion, which means that the products are more time-sensitive and last for a maximum of one season, which in effect increases the household spending on fashion for consumers, especially millennials, and is no longer in line with millennial consumer preferences.

In conclusion, ZARA has not changed its marketing strategy in line with the shift in consumer preferences of its target consumers after the explosion of COVID-19, and this has been a significant factor in the decline of ZARA's brand value.

#### IV. DISCUSSION

##### *A. Brand Value, Customer Preferences and Sustainability in the Context of COVID-19*

For the current ZARA, the main purpose of the marketing strategy should be to improve brand value, adjust the brand image, and change and develop sustainable fashion to meet consumer needs and psychological recognition. However, brand value can be improved through satisfying customer preference and applying IMC (Integrate Marketing Communication) strategy.

First of all, New media communication should be the core of ZARA's future marketing communication strategy. As of now, the COVID-19 pandemic is still widespread around the world and is likely to continue for the foreseeable future, which means that existing consumer behavior will not change

in a short period [2]. Due to the significant slowdown of the world economy because of the COVID-19 outbreak, most companies have scaled back, which has directly led to the soaring unemployment rate and the decline of people's income and affects people's consumption preference. Although the ecumenical outlook is unclear, it focuses on minimalism during the recession [20]. Compared to diversified fashion preferences before the outbreak of the current consumers, who prefer classical design and hope to re-design the products conform to their own needs and aesthetic. It is essential for international fashion retail companies like ZARA to directly communicate to the customer to gain their preferences while developing network technology to provide communication.

As the fastest and most widely used media to spread information, social media can play an important role in marketing communication. ZARA can use social media, such as Facebook and Instagram, to release their latest products and widely spread their target customers' trust, satisfaction, and loyalty [21]. Facebook and Instagram are also considered essential platforms for international fashion companies to communicate directly with their customers and create brand value [22].

Through social media, ZARA can use customers as part of marketing communication to promote the brand and gain higher brand awareness and image, also known as word-of-mouth. By strengthening the loyalty of existing customers and making them become brand promoters, this two-way communication between customers and brands can also create continuous improvement of products and services.

Secondly, as one of the famous and continuously concerned marketing channels for fashion brands, E-store should play an essential role in ZARA's marketing communication strategy. IMC's perspective, strategic selection, and online marketing design are essential for communication in distribution and promotion [23]. Meanwhile, when the international fashion retail companies choose E-store as their distribution and communication channel, "integrating all the expression of the brand" and "delivering a consistent brand experience" should be considered as the core success factors [24]. Through a survey [25], the company's online and offline brand images are mutually influential, which, specifically, customers' experience in one channel will affect the shopping experience in the other channels. Therefore, fashion companies should also consider the impact on their offline store shopping experience when establishing an e-store. There are three main points to consider, 1) Brand image fit. Brand image fit means that online and offline marketing channels should convey the same values and brand cultures to customers, such as similarity, consistency, and even connectivity between different sales and communication channels. These are all critical factors for the business success of international cross-channel retailers. Thus, through maintenance, the consistency of brand image will be continuously gain the loyalty of existing customers from different channels. (According to the "80/20 rule", existing customers account for 80% of a company's profits.) It is a more cost-effective way for fashion brands to keep existing customers loyal than to attract new ones; 2) Visual and experiential appeal. Due to customers cannot see the physical products in an online store,

so visual appeal is critical. (Savastano *et al.* (2019) [26] emphasized that the presentation of visual effects of e-store will directly affect consumers' purchase intention, and the brand personality presented will also significantly affect the brand image in consumers' minds. Therefore, as an international multi-channel fashion retailer, it is necessary to carefully identify its brand personality and integrate it into the visual design of electronic stores to convey brand characteristics, brand image, and brand value to customers. 3) Relevance between brands and consumers. It is mainly related to the effectiveness of marketing communication and customer self-perception. The matching degree between customers' cognition of brand characteristics and actual brand characteristics will directly affect the attractiveness of e-stores to customers. Due to the impact of COVID-19, customers' preference has shifted from diversified fashion products to classically designed fashion products, and this change may affect the relevance between brands and customers. Therefore, as an international fashion brand like ZARA, it should conduct a regular and long-term inspection to understand the needs and wants of target customers to improve the relevance and improve customer loyalty by constantly meeting their expectations [26].

This research focuses on the sustainability of marketing. Marketing sustainability is related to the IMC (integrated marketing communication); it can be divided into two parts, including content integration and resource integration. Content integration requires companies to make precise distinctions according to consumer behaviors and demands for products. Secondly, companies need to improve market competitiveness by providing attractive points according to the needs and wants of consumers. The third is to clarify the brand positioning and the relationship between consumers (consumers' perception of the brand); The fourth is differentiation, that is, to establish a unique brand personality and maintain consistency in multi-channel communication, to highlight brand value. Finally, as one of the strategic goals of fashion retail companies, sustainability is also closely focused on current customers. Resource integration is the application of integrated content to different marketing media, including offline and offline advertising, promotional activities, news media, and packaging, also known as Speak With One Voice.

## V. CONCLUSION

In this paper, we focus on the impact of COVID-19 on the marketing communication strategy of international fashion retail companies and the various reasons for the impact. We also analyze the macro fashion retail market environment using the PESTLE model, including politics, economy, society, technology, law, and environment. Moreover, through the case analysis of ZARA to understand how international fashion retail brands are affected by these factors. Based on the analysis, we know that brands in the international retail market are mainly affected by: 1) the change of consumers' preference for information channels after COVID-19; 2) Brands in traditional international markets are more focused on offline customer experience, but this business model has been strongly impacted during COVID-19; 3) The change of consumers' preferences leads to

the mismatch between the original brand characteristics of international fashion brands and the loss of customers. Therefore, in order to solve these problems, we propose three possible solutions: 1) Establish online marketing channels, including social media platforms, so that brands can directly communicate with customers to directly understand their needs and improve their sense of participation and experience; 2) Establish e-store to let customers know about fashion products more efficiently and improve their shopping experience, and brand loyalty; 3) based on the first two points, international fashion brands should pay attention to IMC strategy, namely, 'speak with one voice', which means that multi-channel marketing communication should be based on the same brand characteristics and provide a consistent brand image for customers.

The discovery of this paper to the international fashion retail brands to offer some references to the changes in the marketing communication strategy and promote the role, but also solves the affected by COVID - 19 outbreak brand value to reduce the problems, through the weakness of the existing market marketing communication strategy is analyzed to put forward more effective mode of transmission, and in this way to help international fashion retail brands to re-establish brand value.

The object restricts this study. It is difficult to obtain international fashion retail brands and market information, so the primary use of second-hand data as the argument to support. But second-hand information is not very good research of the facts of the target market and target change, so this study does not have good effectiveness. Meanwhile, in the case analysis part, ZARA is only analyzed. Although ZARA is a representative fashion retail brand in the international market, it cannot reflect the marketing communication strategies of different international fashion retail brands under COVID-19. In future research, we hope to conduct direct communication and cooperation with international fashion retail brands and market research institutions and simultaneously conduct qualitative and quantitative data analysis to improve the research's effectiveness, accuracy, and diversity. As COVID-19 is an ongoing crisis for the global fashion industry, international fashion retail brands need to re-evaluate the available resources and marketing communications strategies they implement and remain open.

## CONFLICT OF INTEREST

The author declares no conflict of interest.

## AUTHOR CONTRIBUTIONS

All content of the article was done independently by Hanru Niu.

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