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A change beyond fast fashion: An analysis of Zara's positioning and communication

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Abstract

In barely fifty years Zara has become one of the main brands in the textile sector on a global scale. Starting off a small store in the city of A Coruña, it has transformed itself into a referent for fast fashion at a world level. Best known for its ability to present new garments in store every fortnight, is it possible for the Galician brand to have chosen to change its positioning?

This research is born from the idea of analyzing the possibility of Zara adopting a luxury repositioning strategy through the communications with the consumer. In order to corroborate the hypothesis: Zara is following a luxury positioning strategy; a content analysis has been developed which will take into account a total of twenty-eight YouTube videos presenting different Zara Woman collections. The analytical instrument is created and developed based of the approaches conducted by the following authors: Keller (2009), Okonkwo (2007), Fionda & Moore (2009), and Kapferer & Bastien (2009).

This analysis highlights that, in fact, throughout the last decade there has been an increase in the representation of the different elements and categories identified as denoting luxury, to a greater or lesser extent, through the communications of the brand. From the inclusion of elements that expressed a strong brand identity, to those signifying exclusivity and differentiation, but never through the reference to pricing. The Galician brand seems to have changed its communications strategy with the aim of repositioning itself, specially entering the decade of the 2020s.

After analyzing the data obtained, the initial hypothesis is found as partially confirmed. This meaning that there is an increase in the presence of characteristic elements from the luxury sector in the communication of Zara. But the limitations of the study do not allow to confirm that all corporate communications follow a luxury positioning strategy. Nevertheless, the increase in the presence of these elements, specially over the last few years, might imply that Zara is trying to improve its positioning with regard to previous years through its communications.

Lastly, it is found that, Zara cannot be considered a high-end luxury brand, at the moment. But through its aesthetics and communications, it might be seen that it falls within a “premium” sector, finding itself between luxury and fast fashion. But with a new direction and a changing environment, this might only be the first step towards luxury.

Keywords: Zara, positioning, strategy, brand, communication, luxury, content analysis.

Resumen

Zara se ha convertido, en sus apenas cincuenta años de vida, en una de las principales marcas del sector textil y de la confección a nivel mundial. Empezando como una pequeña tienda en la ciudad de A Coruña, ha llegado a transformarse en un referente de la moda rápida global. Conocida por su habilidad para presentar nuevas prendas en tienda cada dos semanas, ¿es posible que la marca gallega haya decidido cambiar su posicionamiento?

Esta investigación nace con la idea de analizar la posibilidad de que Zara siga una estrategia de reposicionamiento de lujo mediante su comunicación con el consumidor. Para comprobar la hipótesis: Zara sigue una estrategia de posicionamiento de lujo, se ha desarrollado un análisis de contenido que cuenta con un total de veintiocho vídeos de YouTube presentando colecciones de Zara Woman. El instrumento de análisis se crea y fundamenta a partir de las propuestas de los siguientes autores: Keller (2009), Okonkwo (2007), Fionda & Moore (2009), y Kapferer & Bastien (2009).

Este análisis demuestra que, en efecto, a lo largo de la última década ha habido un aumento en la representación de los elementos y categorías empleados para denotar lujo, en mayor o menor medida, en las comunicaciones de la marca. Desde la inclusión de elementos que expresan una fuerte identidad de marca, a aquellos que significan exclusividad y diferenciación, pero nunca pasando por el precio. La marca gallega parece haber cambiado su estrategia comunicativa para reposicionarse, especialmente en la década de los 2020.

Tras el análisis de los datos obtenidos, se establece que la hipótesis inicial puede ser aceptada parcialmente. Pues, se ve un aumento en la presencia de elementos característicos del lujo en la comunicación de la marca. Pero las limitaciones del estudio no permiten afirmar que Zara sigue una estrategia de posicionamiento de lujo en todas sus comunicaciones corporativas. No obstante, el incremento de la presencia de estos elementos, especialmente en los últimos años, puede denotar que Zara está intentando mejorar su posicionamiento con respecto a años previos a través de su comunicación.

Por último, se establece que, Zara no puede ser considerada una marca de lujo en su totalidad en la actualidad. A pesar de ello, es mediante su estética y su comunicación que la marca representa un sector “premium”, encontrándose así a medio camino entre el lujo y la moda rápida. No obstante, bajo una nueva dirección y ante un entorno en constante cambio, este puede ser el primer paso de Zara hacia el lujo.

Palabras clave: Zara, posicionamiento, estrategia, marca, comunicación, lujo, análisis de contenido.

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1 Introduction

Due to the ever-changing and evolving competitive markets of the modern day, where consumers are overload with information from a wide variety of companies with quite a similar offering, enterprises might cling onto the creation of a unique identity in order to differentiate themselves.

Starting from the nineteenth century onwards, and due to the industrialization, companies and enterprises started to brand the goods and services they offered (Mitterfellner, 2019). Throughout the development of branding over time, the concept of the brand has evolved into an important part of the purchasing decision of consumers, as they often link different ideas and traits to them. Not only this, but they have also become a way of communicating with others. People use brands to define and express themselves, as they normally are inclined towards the use of brands that they can relate to, those with which they feel identified, which they feel represent them best (Hoyos Ballesteros, 2016). Additionally, a brand, as its primary conception implied, also helps the consumer identify less ambiguous characteristics and provides them with information of the product itself or the company that sells the product and its manufacturer – if not the same enterprise (Blackett & Russell, 1999).

As a consequence of the significant role that brands play as a differentiating element in the market today, branding and positioning strategies together have increased their importance for the different businesses. This is a key element in the fashion industry specially, as clothes and accessories are expressions of how we feel, how we see ourselves – and how we wish to be treated by others (Tungate, 2005). Fashion photographer Vincent Peters said in an interview that “You don’t buy clothes – you buy an identity”. In order for this to work, it is important to not only consider the product within itself, but also all the elements that conform the brand, from the visual identity to its communication, among others. As Tungate (2005, p.20) puts it, “the key to a successful fashion label lays not just in the garments, but in the ‘universe’ surrounding them”.

Considering what has been previously stated, it is only natural that an interest on the strategy of one of the biggest fashion brands has arisen.

Zara, the flagship brand of Spanish Inditex group, – third company in the top-twenty ranking of brands in the fashion industry (based on the fiscal years 2019-2021) as stated in BoF State of Fashion 2023 – is one of the biggest players in the industry. A few years back it started to develop different actions that have initiated a conversation around industry professionals about its possible change of positioning. From collaborations with highly perceived brands such as Narciso Rodríguez, to the development of their own “higher end” collections, or just the change in the direction of the company withing itself. These are all elements that might imply that Zara, for many years the biggest fast-fashion player, is now changing its branding and positioning towards a more aspirational or luxury sector.

It has been with these observations in mind that the idea to develop this project began, in the hopes of figuring out Zara’s current branding and positioning strategies through the study of their different elements, such as the brand’s communication. This is due to the fact that, fashion journalists and experts, such as Marta Godoy, Paula Llanos, Beatrice Po, Uxía Prieto, Lorenzo Salamone, or María José Pérez Méndez, among many, have started to speak on the matter of Zara’s repositioning. Though, at the moment, to author’s knowledge, there are no academic papers nor research that focus on the analysis of the different elements that help in the construction of the identity and possible repositioning of the brand.

The rise of strong new competitors, the change in leadership and direction of the company, the new sustainability regulations, and the uncertainty presented in the global context might just be some possible drivers of the change in Zara’s strategy. In a constantly changing environment and a society where consumers are overload with information from distinct brands, it might not be so wrong to

consider that Zara has outgrown the fast-fashion sector, thus looking for a new opportunity to develop its business.

Therefore, this study aims to supply more detailed insight, based on an earlier observation and study of Zara's actions as well as a review of the existing literature, that corroborates, or denies, the following hypothesis:

H1: Zara is following a luxury positioning strategy.

Additionally, to providing an answer to the previously stated hypothesis, this research is also developed with the aim of completing the following objectives, as they are considered crucial for a proper understanding of the positioning strategies of the brand.

- Figure out if there has been a change in the way Zara communicates with the general public.
- Figure out if Zara is presenting "luxury characteristics" through its communications.
- Figure out the most relevant elements that denote luxury in Zara's communications.
- Understand the reasons that might lead to a change in Zara's positioning strategy.

It is important to mention that the main limitation of this research relates to the amount of marketing and branding elements that influence positioning. Hence, through this study, and for the completion of the objectives and hypothesis presented, the main focus will be put on the brand's communication with consumers, as the main touchpoint.

As per the last objective that has been set, this study is not only trying to determine if there is an actual change in the positioning strategy that Zara is currently implementing, but it will also try to understand the reasons that might have led to the possible change in the strategy. Whilst being a secondary objective of the research, due to the size of the brand that is being analyzed, understanding some of the main drivers that might have led to this plausible change can provide useful information and insight regarding the state of the industry – with a special focus on the fast-fashion sector –. It is not common for one of the biggest players in the industry to implement such change, if confirmed true, without a reason behind it.

Zara and Inditex have been known for being somewhat closed regarding the sharing of information about the business. Due to the nature of the objectives being set, it has to be kept in mind that all former conclusions that will be stated in this study, will be based on the observations of the author as well as the literature and information available on the matter up to the date of writing. They will not be in anyway a confirmation from the brand itself unless the information comes from the corporation firsthand and is stated as so.

2 Literature review

All through this section of the present project, different concepts will be studied and contemplated, which are considered of vital understanding for the development of the current research.

2.1 Positioning

Positioning arises as a consequence of the increasing competition in the different industries and markets. Considering the number of companies offering comparable products or services, one of the main problems for organizations lies in the ability of the publics to quickly identify and differentiate the offering of the company within a market or sector (Capriotti Peri, 2009).

Although the term was first introduced back in the 1960's, it has been stated that due to the increased competition or the similar offerings, among many others; there has been a change in its understanding. It has now become an increasingly important strategic decision for all companies and businesses (Mogaji et al., 2023). So, it can be determined that it appears for the main purpose of highlighting differentiating elements of a brand or company, and it is based on the fact that the consumer choice derives from a comparison process among the various offers in the market (Rua & Santos, 2022).

When the term product positioning started to be used, it was closely related to the idea of controlling the mind of the consumer, thus being conceived from the beginning as related to a perception or idea that the consumer might have about a brand (Salunke & Zaware, 2018). It was Arnott (1992) who determined that positioning could be achieved when changing both the tangible and intangible elements that surround a brand or product, to gain a competitive advantage from it. The term has since then evolved to become a crucial strategic decision as it involves "the placement of a brand and all its associations in a distinct place in the mind of the consumer", which is obtained through the use of communications (Okonkwo, 2007, p.116). Therefore, it can be seen that positioning, even from the first developments of the term, has been quite related to the idea of perception and the persuasion of the mind of the consumer, creating and building an image that will differentiate one company from the rest.

Moreover, it is important to differentiate between brand and market positioning. As Okonkwo (2007, p.116) puts it, the market positioning refers to the "competitive position of a company in terms of size and market share, in a particular sector". Doyle (1983) also related this idea to the target market selected – the customers the brand will serve – and the way in which a company will compete in said market. These ideas put the focus on a specific market, leaving the intangible elements of brand positioning somewhat unattended. Such these types of definitions provide a view that is more focused on the segmentation part of the positioning strategy, rather than the place that the brand will occupy in the consumer mind. Therefore, for the purpose of this research, the definitions taken will try to walk away from these statements, to focus on those that provide a clearer relationship between the strategy itself and the impact it has on the perception of the brand by the public, this is, brand positioning.

Consequently, brand positioning will be understood as the process of creating a company's own image, distinctive properties and positive associations and values in the mind of the consumer in order to create a sustainable trademark image and ensure the consumers' attachment to it (Fayvishenko, 2018). Indeed, Kotler & Keller (2012, p.276) have defined brand positioning as the 'act of designing the company's offering and image to occupy a distinctive place in the mind of the target market'. Similarly, there is also the conception that positioning is the way organizations are perceived compared to their competitors by the relevant consumer group (Rua & Santos, 2022), going back to the idea of the perception by the publics.

In order to achieve the right positioning intended, a strategy or various stages need to be followed and taken into consideration, among which we find the analysis of the environment, definition of differentiating features, or development of tactics and actions amid many (Fayvishenko, 2018). This defines, in fact, the concept of branding, as it will be seen further on this project. This is due to the fact that the perception that the public has of the organization is highly linked to the management of the brand creation process (Rock Content, n.d.). Branding has been linked as one of the main sources for the creation of associations between brand and consumer, therefore having a central value in the positioning of brands and being a leading factor for its differentiation (Rua & Santos, 2022).

Positioning is closely related to the perception consumers have of a brand. This perception is not only influenced by brand efforts, but also by the effects of the environment around them. When not managed correctly, the desired positioning of an organization might change, or never be achieved. But, in the same way the change in positioning might be a result of an unsuccessful implementation of a strategy, it might also be a conscious decision. Brands need to constantly watch the environment around them for many reasons, one of them including the definition of their desired perception by consumers. It is important to understand the surroundings of the brand in order for it to determine how it wants to be perceived, who it wants to be (Capriotti Peri, 2009). These changes in the perception of the brand are normally referred to as repositioning.

2.2 Branding

According to what has previously been seen, brands are a critical element for the success of a firm as they become a major source of differentiation between other competitive offerings in the market (Beig & Nika, 2019; Rua & Santos, 2022).

Due to the increasing relevance of the role of brands in the different competitive markets, it is critical to analyze and understand the history of branding. This will allow to come to a clear understanding of the current definition of the term and its implications. Thus, being relevant for the aim of developing a proper analysis of the different efforts performed by organizations and institutions in this regard.

The term branding can be traced back to the word “brand”, which has its origins in an Old Norse word “brandr”, which meant “to burn”, referring to the practice of producers burning their mark (or brand) onto their products (Rajaram & Stalin, 2012). This practice defined the objective of the brand as a manner for identifying property or the origin of something (Blackett & Russell, 1999). As for the Old English origins of said term, “brond” referred to fire, flame, destruction by fire; firebrand, piece of burning wood, torch. This term is also related to the Proto-Germanic “brandaz” meaning “a burning”, the Old High German “brant”, or the Old Frisian “brond”. These are all expressions that had an influence on the evolution of the term “brand”, signifying “mark made by a hot iron” (1550s), especially on a cask, etc., to identify the maker or quality of its contents (Online Etymology Dictionary, n.d.).

Branding, and therefore the use of brands, can be traced back to even the Ancient Rome. In industries such as pottery, this practice played a critical role in the identification of goods (Blackett & Russell, 1999). Early examples of pottery that was being marketed and included some premature type of branding appeared in China 4.000 to 5.000 years ago, Greek pottery was also marked including diverse information such as the merchant offering the goods in the marketplace (Rajaram & Stalin, 2012).

It shall be understood that branding, and the creation of brands, might start with a sign, a way of denoting what an object is, and its presence will immediately lead to the generation of associations which give rise to not only denotations, but connotation as well (Bastos & Levy, 2012). Thus, meaning that branding will inevitably generate positive and negative ideas and associations towards the brand itself and the element being branded (Bastos & Levy, 2012), as was previously mentioned in the explanation of the previous term, positioning.

Whilst during the Industrial Age brands had the purpose of differentiating the product from that of the competition, as simply putting a label to it, this concept has evolved much until reaching its present conception (Hoyos Ballesteros, 2016). To highlight the importance that brands have nowadays, let's take an example from fashion houses in the nineteenth and twentieth centuries. When Charles Frederick Worth started to introduce labels in its designs, it led to the development of fraudulent labels being made, especially in the United States, with the intention of misleading publics and consumers into thinking that certain garments had been produced by the famous couturier when the reality was much different (Coleman, n.d.). This is an example of the vital role that brands have today, as they add immense value and are also sources for personal expression and differentiation from others (Okonkwo, 2009a).

In today's modern age, society is characterized by overconsumption and the reception of multiple stimuli coming from oversaturated markets with many different actors taking part in them, heavily influenced by digital consumption and the Internet (Capriotti Peri, 2009). This has translated into the brand acting as the main medium that allows to generate different social phenomena – like acts of distinction, identification, and differentiation of the different social groups – which are reflected on the dialogue sustained by the individual with themselves and in their surroundings (Hoyos Ballesteros, 2016).

Brands are “perceptions reflected through associations in consumer memory” (Keller, 1993, p.3), and they increasingly rely on the intangible components (Alwi & Kitchen, 2014; Azoulay & Kapferer, 2003; Keller & Richey, 2006; Slaughter et al., 2004). While there are several definitions for the concept of branding, they are all related to the total impression of the organization shared by a group of external members (Franzen & Bouwman, 2001; Rua & Santos, 2022).

Hence, it can be noted that ever since the introduction of the term, branding has evolved greatly. From meanings that put the focus on the ownership of the product or the reputation that it implied, towards the brand image in itself, the symbolic values, the fantasy surrounding brands and products. It is now therefore more related to associations that influence the perception of consumers (Bastos & Levy, 2012).

So much so that the definitions that can be found of the term today, according to the Cambridge Dictionary are:

1. The act of making a product, organization, person, or place easy to recognize as different from others by connecting it with a particular name, design, symbol, set of qualities, etc.
2. The design, symbols, colors, etc. that people connect with a particular product or company.
3. The activity of connecting a product with a particular name, symbol, etc. or with particular features or ideas, in order to make people recognize and want to buy it (Cambridge Business English Dictionary, n.d.).

Whereas Oxford Dictionary's definition states that:

1. The activity of giving a particular name and image to goods and services so that people will be attracted to them and want to buy them.

For the proper conduction of this research project, the definition provided by Cambridge Business English Dictionary will be the main one considered, as this already has a special focus on the application of the term to the business area and presents an idea that relates branding with both the symbolic elements and ethereal values.

As Capriotti (2009, p.11) states, branding is perceived as the process of managing (identifying, structuring, and communicating), the different attributes related to the identity in order to build and maintain relevant links and associations with the different publics, which is closely related – in the business/company/organization environment especially – with the corporate identity.

2.3 Luxury

Luxury brands are some of the most renowned in the market. From fashion and accessories, skincare, cars and jets, hotels, or wines among others, there are a number of brands that create this incessant supply of superior products and services that present a unique positioning (Okonkwo, 2009b).

Luxury needs to be understood as a culture, a social and psychological phenomenon which presents its own rules and requirements which need to be understood before the adoption of business practices. Its main original function is rooted on the differentiation among social classes of past civilizations. From the Roman empire to Grand Nobles and Aristocrats, luxurious and ostentatious garments and items were used to display the superiority and distance between social classes (Okonkwo, 2009a). And although societies have evolved, the core element of luxury has remained, as it is still linked to stratification. The DNA of luxury is the symbolic desire to belong to a superior class, whether this idea of “superior class” has evolved and differed through the pass of time, the concept of trying to accomplish ones’ dreams, escalating, and working towards the achievement of a better or upper position can still be acknowledged (Kapferer & Bastien, 2009).

But in today’s modern society, the reason for consumers to buy luxury products and services is not just as simple. While the aspirational desire remains, the motives that are behind the investment in luxury products and services lies rather on the satisfaction of personal needs instead of differentiation of classes, as people are influenced by “internal” aims (like satisfaction, hedonism, or personal enjoyment), and by “external” aims as well (like social recognition or external appreciation) (Amatulli et al., 2016). Thus, it could be said that the current conception of luxury has also evolved towards a more individualistic and personal approach. This is partly due to the fact that the aspirational aspect presented in luxury goods might also be related to a set of subjective intangible qualities that each individual might associate with it. This change in associations has come as a result of the constantly evolving social, economic and cultural environments in which both, brand and their different publics, develop their activity and establish relationships with one another (Okonkwo, 2007).

Luxury fashion brands are said to be unique, intriguing, and special, allowing consumers to enjoy a lifestyle that meets their deepest psychological and emotional needs through the consumption of ingenious products (Okonkwo, 2007). It becomes important to understand and study luxury brands within the fashion industry, as fashion and apparel represent the largest proportion of the luxury goods (Sabanoglu, 2022). When people acquire a luxury fashion item, it is not only about the garment within itself, but also implies a set of intangible benefits and characteristics that appeal to the emotional, social, and psychological levels of the consumers’ being and that allow them to become part of the universe that the brand is creating (Okonkwo, 2007).

It is due to this higher positioning and the connection established with consumers through the use of intangible elements and associations with their products, that the marketing areas of said brands have been studied through the years, as there are certain principles or characteristics that brands should contemplate in order to be considered as part of this luxury culture (Okonkwo, 2009b). As earlier research has displayed, there are a set of attributes that ought to be managed cohesively in order to create and maintain a luxury fashion brand positioning (Fionda & Moore, 2009). In the studied performed by Fionda and Moore (2009) the framework presented identifies the following classification:

- Brand identity.
- Strong marketing and communications.
- Product integrity.
- Brand signature.
- Premium pricing.
- Exclusivity.

-
- Heritage.
 - Luxury environment.
 - Culture.

Additionally, Okonkwo (2007) has also named the following elements which ought to be present in every brand that tries to present itself as a luxury and managed cohesively: brand strength, differentiation, exclusivity, innovation, product craftsmanship and precision, premium pricing, and high quality.

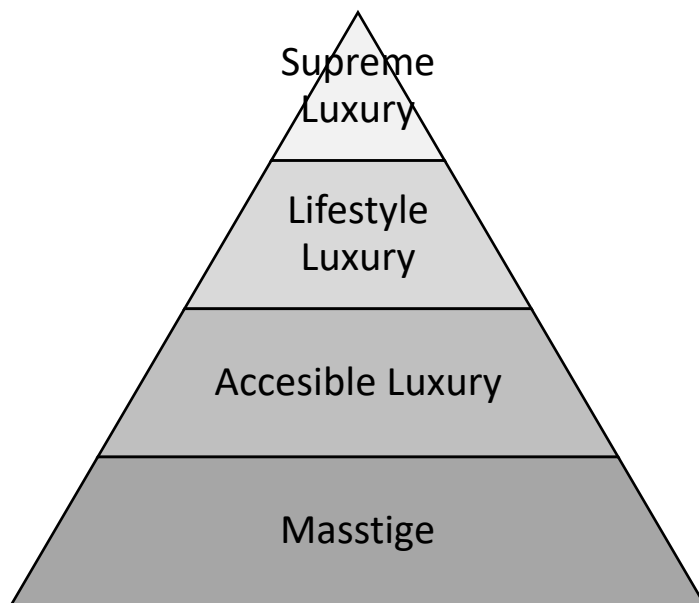
Consequently, it can be concluded that some of the most essential elements of luxury brands rely on the product, which should have a premium pricing and high quality, but most of them revolve around the concept of the brand within itself. As luxury goods do not satisfy the primary needs of consumers and are not valued only in by their functionality, the branding element for companies offering said goods becomes a primary aspect. They have to be able to build and support an image that justifies the elevated pricing and positioning of the goods provided, which will satisfy the social and emotional needs of the consumers that resonate with the created identity of the brand (Keller, 2009).

Though these restrictions have delimited the understanding of what might and might not be considered a luxury as a universal conception, there have also been different terms that have been developed to refer to those offerings which might fall within the gap between luxury and mass market goods and services. The tendency towards the so called “new luxury” is just one example. This consists of higher-end brands creating product lines or collaborations that are more accessible to a wider audience, hence the products continue to possess a higher quality, taste, and aspirations than other goods that fall within the same price category, such as the infamous collaboration between designer brand Karl Lagerfeld and mass-market H&M in 2006 (Atwal & Williams, 2009). Equally important to take into account is the consumer trend of “trading up”, which implies the selection of goods that belong to an upper range from the consumers’ typical choice due to the emotional and experiential rewards perceived from said item (Kapferer & Bastien, 2009). While this does not imply the consumption of luxury goods on a daily basis by the consumer group, it does show the tendency of consumers towards a higher spending in selected goods that they consider exceptional, even when these do not come from luxury brands.

Thus, given the rise of different segments and tendencies that can be found between the luxury and mass market brands, there have been different authors who proposed their own classification of the luxury fashion segments. In order to provide a clear differentiation of the terms and avoid misunderstandings, the following pyramid displays a differentiation or stratification of the segments that can be found withing luxury fashion:

Figure 1

Pyramid of luxury fashion segments.



- Supreme luxury: unique pieces, made-to-measure, handcrafted, precious materials, exclusivity.
- Lifestyle luxury: series production (limited editions), quality/style, heritage and brand identity, selectivity (target, media, channels).
- Accessible luxury: high fashion content, price/quality, accessibility (target, media, channels), power communication.
- Masstige: the price of consumer goods, quality and locations with the style, communication aesthetics and distribution visibility of luxury goods.

Source: adapted from Nervino (2018, p.40)

Consequently, in order to build and maintain the positioning of a luxury fashion brand, it is important to take into account all branding efforts to communicate through all elements of the corporate communications the set of intangible attributes that build the image that the brand is to represent (du Plessis, 2014). This will be done, most likely, through the use of semiotics and references that might implicitly showcase said values and communicate the intangible significance of the brand to the consumers. Semiotics focus on meaning construction and communication through the identification of different signs and symbols and the meanings behind them (Toppano & Toppano, 2014). Thus, said elements will be used to communicate distinct characteristics that will differentiate luxury brands from others.

After an analysis of the different classifications and main characteristics proposed by different authors (Keller, 2009; Okonkwo, 2007; Fionda & Moore, 2009), the following are presented as the ones that tend to be the most common in the identification of luxury brands:

- Product quality and craftsmanship.
- Product design and innovation.
- Premium pricing.
- Brand history and heritage.
- Brand identity and personality.
- Exclusivity and differentiation.
- High visibility and global reputation.

3 Methodology

The aim of this project lies in the demonstration of the hypothesis presented: Zara is following a luxury positioning strategy. With this purpose in mind, it has been considered important to understand and analyze the changes that might have been presented in the corporate identity of the brand. Therefore, taking into account information presented by the brand to communicate with the different publics, a content analysis will be presented. Through it, changes in the communicational efforts will try to be found to determine a variance over the last years towards a luxury approach.

As a systemic and objective methodology, which uses procedures, variables and categories that answer to previously defined and explicit criteria, the content analysis has been chosen as the methodology to follow this study due to the ability of integrating both a descriptive and interpretative analysis of the *corpus* included in this work (Bernete García, 2013). A content analysis is presented as the ideal method for this kind of project due to its logical deductive nature, which will allow to grasp a better and more in-depth understanding of the unit elements composing the *corpus* and universe of the analysis (Maman Larraufie & Kourdoughli, 2014).

Due to the nature of the research, the main categories that will be used for the analysis will coincide with those identified as most relevant or needed for a fashion brand to be considered as part of the luxury sector. Therefore, as stated in the earlier pages of this document, these characteristics will include:

- Product quality and craftsmanship: denoting products that highlight exceptional quality themselves and quality of the materials used in the production process, which are resistant and made to last. Also denoting products with an elevated level of craftsmanship and hand-made processes (Kapferer & Bastien, 2009).
- Product design and innovation: referring to products with intricate and original designs that have not been seen before or are characteristic from the brand in question. Luxury brands need to be innovative and original in the designs but also in the way they communicate and even the processes they use – though these tend to be more traditional due to the craftsmanship element (Okonkwo, 2007).
- Premium pricing: luxury products are characterized by having superior prices which tend to be justified by the intangible elements that are associated to the brand in question. So, the inclusion or mention of superior prices will help identify a more luxurious positioning as it works as a barrier or denotes exclusivity in the accessibility of the products by consumers (Okonkwo, 2007).
- Brand history and heritage: luxury brands are closely related to the history of their founders, as they have normally been present for some time, or are really fond and loyal to the brand authenticity (Fionda & Moore, 2009).
- Brand identity and personality: the brand identity and personality should be present in everything the brand does as it is the intangible that justifies the elevated price and is closely related to all the different elements here being considered. Therefore, this category will focus on identity and personality elements that might not be able to be considered through other categories (Fionda & Moore, 2009).
- Exclusivity and differentiation: it is important for luxury brands to differentiate themselves from the rest and portray a sense of exclusivity and inaccessibility, as the least accessible the brand is, the more desirable it becomes in the luxury context (Kapferer & Bastien, 2009).
- High visibility and global reputation: the perception of a luxury brand does not only depend on the image that those who can afford it have of itself. It is necessary that those who can only aspire to purchase said brand are able to recognize it. This will maintain the stratification between publics, putting emphasis on its exclusivity. Thus, luxury brands present a sense of

global reputation, being widely known and recognized as luxury, and high visibility as well (Fionda & Moore, 2009).

To prove the appearance, or lack thereof, these elements within the communicational efforts of the company, the content analysis will focus on the study of a *corpus* which will include audio-visual productions generated and owned by the brand. These can all be found in Zara's YouTube channel, even though they are also distributed through other channels and social media like Instagram.

The type of documents chosen for the composition of the *corpus* has not been at random. Meaning that the decision to include YouTube videos comes from the understanding of the importance of the social media platforms and technologies as a communication tool with wider publics. Also, in the current times, content has become the main currency of social media, and since the fashion industry is highly visual, many fashion houses have started to use motion content as a strategic tool for the communication for rebranding and the brand identity and visual communications (Rees-Roberts, 2019b). Another crucial factor to consider is that these elements, as obtained directly from the brand owned channels, become a direct form of communication with the consumers, as well as other publics targeted by the enterprise.

The focus will be on the analysis of communications regarding the launch of woman collections, excluding fashion-film formats. These videos will also be limited to a period of ten years¹. Therefore, starting with the latest video produced as a campaign for the Spring/Summer collection of 2023, and the earliest being part of the Spring/Summer collection of 2013. The time frame will allow to study the evolution of the communications and analyze if there might have been a change in recent years towards a luxury approach.

Considering a female audience, only those videos that specifically target the "Woman" line or category within the brand will be contemplated. Though at first instance the inclusion of those videos promoting Zara TRF was pondered upon, there have been a series of considerations that have led to its discard. Some reasons include the limited number of items identified, the withdrawal of the section from the online store format (Scofield, 2020), and especially the younger audiences targeted by the line (Lewis, 2018) – which would have had an influence in the communication –. So, it has been concluded that said videos were not suitable items to include in the analysis as they might interfere with the results obtained from the analysis of the Woman line alone, therefore allowing to reach finer conclusions on the matter at hand.

It is also worth mentioning that the author has noticed that at the time of the development of the analysis, there are several videos which are unavailable on the official channels of the brand, thus posing limitations to the study, and therefore not being able to be taken into consideration. These limitations have led to the identification of twenty-eight different video documents that will make up the sample for the analysis. As to provide an easier understanding of which are the selected items for the analysis, they will be noted in Table 1, including the official name for the videos and an ID code that was created for a simpler referencing to said documents hereon. Therefore, through the list provided it will be easier for others to complete the present study for further information that would like to be obtained or refuted.

¹ The year 2014 is excluded as no videos are available in the official channel of the brand.

Table 1*Codes for video identification.*

VIDEO TITLE	VIDEO ID
ZARA WOMAN SS23 STUDIO COLLECTION	ZRW_SS_23_ST
ADER ERROR X ZARA. PEOPLE IN THE ROW*	ZRW_FW_22_AE1
ADER ERROR X ZARA. CYCLE A TO Z	ZRW_FW_22_AE2
KAIA COLLECTION X ZARA	ZRW_FW_22_KC
A MOMENT IN TIME. ZARA FW'22 CAMPAIGN	ZRW_FW_22_ST
ZARA WOMAN STUDIO SPRING SUMMER '22 COLLECTION	ZRW_SS_22_ST
ZARA WOMAN STUDIO FALL '21 COLLECTION	ZRW_FW_21_ST
THE CHARLOTTE GAINSBURG COLLECTION	ZRW_FW_21_CG
ZARA WOMAN SPRING SUMMER 2021 CAMPAIGN	ZRW_SS_21
ZARA WOMAN CAMPAIGN FALL WINTER 2020	ZRW_FW_20
ZARA SPRING SUMMER*	ZRW_SS_20_1
ZARA WOMAN CAMPAIGN SPRING SUMMER 2020	ZRW_SS_20_2
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2019	ZRW_FW_19
ZARA WOMAN CAMPAIGN SPRING SUMMER 2019	ZRW_SS_19
LOOKBOOK CAMPAIGN AUTUMN WINTER 2018	ZRW_FW_18_LB
ZARA WOMAN CAMPAIGN FALL WINTER 2018	ZRW_FW_18
ZARA WOMAN EDITORIAL VAST LANDS	ZRW_SS_18_ED
ZARA WOMAN CAMPAIGN SPRING SUMMER 2018	ZRW_SS_18
ZARA PRE-FALL 17	ZRW_FW_17
NOMAD ZARA WOMAN EDITORIAL AW17	ZRW_FW_17_ED
ZARA WOMAN CAMPAIGN SPRING SUMMER 2017	ZRW_SS_17
ZARA WOMAN STUDIO CAPSULE COLLECTION	ZRW_FW_16_ST
SPORT ZARA WOMAN EDITORIAL #AW16	ZRW_FW_16_SP
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2016 #DISCOFOREST	ZRW_FW_16
ZARA WOMAN CAMPAIGN SPRING SUMMER 2016	ZRW_SS_16
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2015	ZRW_FW_15
ZARA WOMAN CAMPAIGN. SPRING SUMMER 2015	ZRW_SS_15
ZARA SS13 WOMAN	ZRW_SS_13
Total	28

Source: own elaboration.

Note. In those videos in which the title is followed by an asterisk (*), there has been a number 1 or 2 added at the end of the video ID as there were more than one unit that presented the same code for video ID otherwise.

Having delimited and named the items and elements that will play a part in this investigation, it is important to also provide information on the table used to study if the selected documents present luxury characteristics. Accordingly, taking into account different models that consider related elements to the investigation, such as Aaker's brand identity model, or information provided by authors – such as Maman Larraufie & Kourdoughli (2014), Nervino (2018), or Amatulli et al., (2016) –, the author presents the following table (Table 2) including the main luxury characteristics (categories), the means through which these might be represented in the videos (elements), and the codes associated.

Table 2*Coding of categories and elements considered for the content analysis.*

CATEGORY	ELEMENT	CODES
Product quality and craftsmanship (Q)	Information about product's country of origin (CoO)	Q1
	Close shots showing product detail	Q2
	The video showcases the production process	Q3
	Appearance of artisans and other employees involved in the creation process	Q4
	Information about materials	Q5
Product design and innovation (D)	Technological innovation and new techniques (in production process or other areas)	D1
	Showcase of original, intricate, recognizable designs	D2
	Collection created by renowned designer	D3
	Iconic products from the brand are shown	D4
Premium pricing (P)	Price range of products shown is included	P1
Brand history and heritage (H)	Reference to the region where the brand was founded	H1
	References to the brand founder	H2
	Use of timelines and reference to past dates (written or audio form)	H3
	Visual references to past times through aesthetics (filters, design...)	H4
Brand identity and personality (I)	Presence of logo	I1
	Usage of brand colors	I2
	Explicit mention of the mission or vision of the brand	I3
	Personal tone as the audio addresses the consumer directly	I4
	Impersonal tone as the audio is generic (does not address the consumer directly, or it is a song)	I5
	Models/people look directly at the viewer	I6
	Intimate/personal tone through close shots of model (face or up the shoulders)	I7
	Impersonal tone through use of long shots of model	I8
	Representation or reference to myths and fantasies	I9
	Introduction of other visual art forms	I10
Exclusivity and differentiation (E)	Lack of direct purchase call-to-actions in video or video description	E1
	Limited edition or special collections	E2
	Collaborations with other fashion houses	E3
	Recreation of fashion shows	E4
	Images mostly present a low angle, thus denoting brand exclusivity	E5
	Renowned fashion photographers or art-directors	E6
	Use of super models or fashion celebrities	E7
	Use of French language (written or spoken)	E8
High visibility and global reputation (V)	Written communication is in English by default, whether in video or video description	V1
	If spoken, the used language is English	V2
	Videos shot in outside location	V3
	Videos shot in set	V4
	People seen in screen are from different ethnicities or races	V5
	Use of high-profile celebrities outside the fashion industry	V6
	Collaborations with artists from outside the fashion industry	V7

Source: own elaboration.

Note. The table showcases the different luxury categories to be examined through the content analysis, including the different elements that would be taken into account and look for in each video, and the code corresponding to each element of each category.

In order to analyze the presence of these elements in the documents making up the *corpus* of the analysis, there are various parts that shall be considered: the visual imagery, the audio, the title of the video, and the description box. These four parts will be taken into consideration in the finding of information that might respond to the elements studied. Hence, allowing to determine the presence of typical luxury characteristics in Zara's communication with the general public.

It is to be noted that the information collected for the analysis is merely based on what is provided by the brand through its YouTube channel, thus meaning that even when data might be known – such as the photographer or art director for the campaign – through other means, it will not be recorded unless provided in said channel for legitimacy purposes. If this was to be ignored, the conclusions of the analysis shall be considered tainted or polluted as they will not be true to the corpus being studied. Though this does not imply that the analysis of other documents cannot be used to complement the present research and obtain a more insightful conclusion about the strategy of the brand.

A quantitative gathering of the data obtained will be performed (see Appendix I), considering the information grouped by both year of the collection and category. So, a first attempt at grouping the information by year will need of new references or identifiers in which each video will be grouped.

Table 3

Categorization of videos by year of campaign.

VIDEO TITLE	VIDEO ID	YEAR ID
ZARA WOMAN SS23 STUDIO COLLECTION	ZRW_SS_23_ST	ZRW_2023
ADER ERROR X ZARA. PEOPLE IN THE ROW*	ZRW_FW_22_AE1	ZRW_2022
ADER ERROR X ZARA. CYCLE A TO Z	ZRW_FW_22_AE2	ZRW_2022
KAIA COLLECTION X ZARA	ZRW_FW_22_KC	ZRW_2022
A MOMENT IN TIME. ZARA FW'22 CAMPAIGN	ZRW_FW_22_ST	ZRW_2022
ZARA WOMAN STUDIO SPRING SUMMER '22 COLLECTION	ZRW_SS_22_ST	ZRW_2022
ZARA WOMAN STUDIO FALL '21 COLLECTION	ZRW_FW_21_ST	ZRW_2021
THE CHARLOTTE GAINSBOURG COLLECTION	ZRW_FW_21_CG	ZRW_2021
ZARA WOMAN SPRING SUMMER 2021 CAMPAIGN	ZRW_SS_21	ZRW_2021
ZARA WOMAN CAMPAIGN FALL WINTER 2020	ZRW_FW_20	ZRW_2020
ZARA SPRING SUMMER*	ZRW_SS_20_1	ZRW_2020
ZARA WOMAN CAMPAIGN SPRING SUMMER 2020	ZRW_SS_20_2	ZRW_2020
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2019	ZRW_FW_19	ZRW_2019
ZARA WOMAN CAMPAIGN SPRING SUMMER 2019	ZRW_SS_19	ZRW_2019
LOOKBOOK CAMPAIGN AUTUMN WINTER 2018	ZRW_FW_18_LB	ZRW_2018
ZARA WOMAN CAMPAIGN FALL WINTER 2018	ZRW_FW_18	ZRW_2018
ZARA WOMAN EDITORIAL VAST LANDS	ZRW_SS_18_ED	ZRW_2018
ZARA WOMAN CAMPAIGN SPRING SUMMER 2018	ZRW_SS_18	ZRW_2018
ZARA PRE-FALL 17	ZRW_FW_17	ZRW_2017
NOMAD ZARA WOMAN EDITORIAL AW17	ZRW_FW_17_ED	ZRW_2017
ZARA WOMAN CAMPAIGN SPRING SUMMER 2017	ZRW_SS_17	ZRW_2017
ZARA WOMAN STUDIO CAPSULE COLLECTION	ZRW_FW_16_ST	ZRW_2016
SPORT ZARA WOMAN EDITORIAL #AW16	ZRW_FW_16_SP	ZRW_2016
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2016 #DISCOFOREST	ZRW_FW_16	ZRW_2016
ZARA WOMAN CAMPAIGN SPRING SUMMER 2016	ZRW_SS_16	ZRW_2016
ZARA WOMAN CAMPAIGN AUTUMN WINTER 2015	ZRW_FW_15	ZRW_2015
ZARA WOMAN CAMPAIGN. SPRING SUMMER 2015	ZRW_SS_15	ZRW_2015
ZARA SS13 WOMAN	ZRW_SS_13	ZRW_2013
Total	28	28

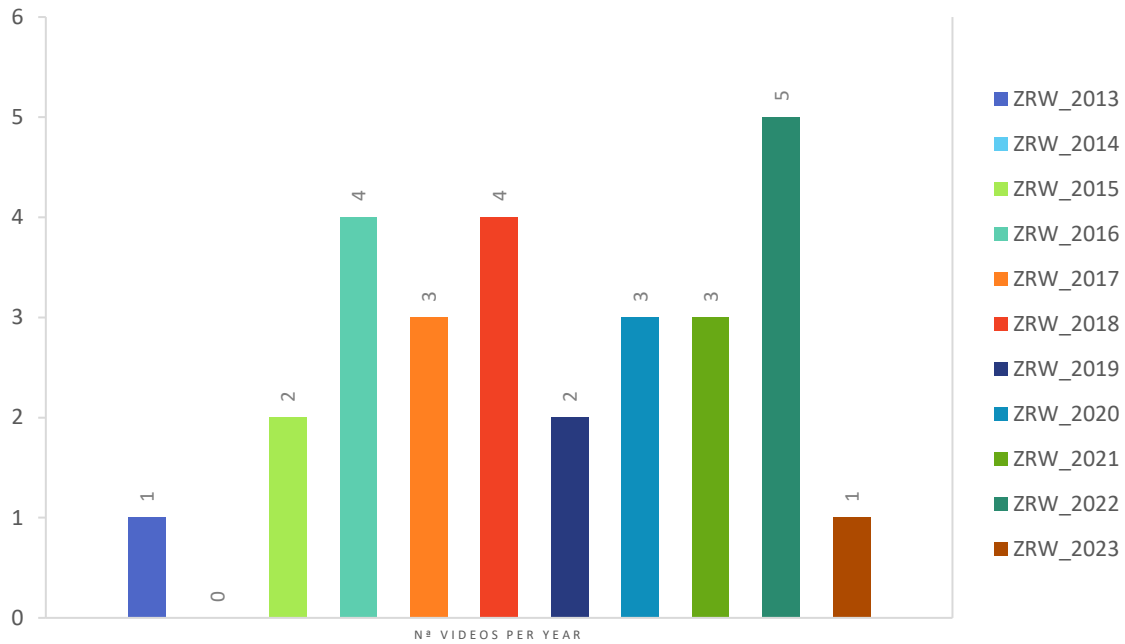
Source: own elaboration.

Note. The videos and codes already presented in Figure 2 are now grouped by year of the campaign as shown in the third column provided.

For better understanding, Figure 2 has been developed highlighting the number of videos considered for each year of the period studied (2013-2023).

Figure 2

Number of videos considered per each year studied.



Source: own creation.

The data collected through the content analysis for each individual video was grouped accordingly in each corresponding year by calculating the average for each element of each year in percentage form (see Appendix II). Then the same was done in order to group all different elements into their corresponding category and being able to measure the presence of the categories through the years (see Appendix III). This allowed to obtain a better understanding of the inclusion of luxury characteristics in the content created by the brand along the years.

Through this procedure, a qualitative analysis of each individual document is achieved, as well as a quantitative analysis that will allow to understand the trends followed during the decade under study.

4 Understanding Zara

“Zara is a forward-thinking force in fashion; embodying what is possible when responsibility and aspiration are accessible to all. By bringing more thoughtful style to the world, we aim to provide everyone, no matter where they are, with the inspiringly beautiful, always on-trend, responsibly crafted fashion they deserve.

Nurturing a highly intimate relationship with its customers, Zara’s designers respond instinctively to their changing needs, reacting to the latest trends and constant feedback to deliver new ideas for everyone in the right place and at the right moment.” (Inditex, n.d.-a)

Zara has become one of the biggest brands in the fashion industry, to the point where it has ranked as the top forty-seventh brand in the *Best Global Brand Index* by Interbrand in the year 2022 (Interbrand, 2022). This presents the brand at a higher position than the majority of fashion brands and houses, only surpassed by the likes of Nike (tenth), Louis Vuitton (fourteenth), Chanel (twenty-second), Hermès (twenty-third), Gucci (thirtieth), or Adidas (forty-second). This showcases the undeniable growth that the brand has achieved during its almost fifty years of existence, and especially over the last twenty years, as its first appearance on the ranking was made in the year 2005, where it ranked as the brand seventy-seventh in the global scale (Okonkwo, 2007). This growth and reputation have been achieved due to the implementation of different business strategies that have proved Zara as the fashion giant that it is today. Thus, it is quite intriguing to understand the origins of the brand, to figure out which is the present position that might put a light on the future direction of the company.

Founded in 1975 by, now renowned businessman, Amancio Ortega Gaona, Zara opened its first store in one of the central and commercial streets of A Coruña, in Galicia, Spain (Tungate, 2005). The first idea was simple, to provide consumers with goods that replicated the design from the luxury houses but at a lower price point. From that moment on, the popularity of the brand was quite noticeable, as in just about a decade, the fashion chain had gone from the opening its first store, to owning eighty-five retail spaces dispersed around the country (Thomas, 2019). The international expansion came closely after, as in 1989 Zara opened the first store right outside the Spanish frontiers, in Oporto, Portugal. It later continued the expansion including some of the biggest and most popular cities in the world such as Paris, New York, and London – all celebrated fashion capitals (Tungate, 2005). Such internationalization was partly the consequence of the innovative strategies that the company was implementing at the time.

Zara defines itself as a forward-thinking force in fashion (Inditex, n.d.-a), and this has been something that the brand has proven since its beginnings. One of the main differentiators and value proposition of the fashion brand relies on the efficiency of its supply chain. Through different strategies and thanks to its vertical integration, Zara is able to adapt designs, manufacture, distribute and retail garments in a fortnight (IE University, 2017). To the point where a completely new garment can be sold in stores only 4 weeks after the initial design (Lopez & Fan, 2009). This is not only due to the implementation of strategies such as the vertical integration design, just-in-time manufacturing, delivery and sales, the flexible structure, the low inventory rule, or the quick response policy (Lopez & Fan, 2009). The results of the brand are also highly connected to the effective treatment and gathering of data in all steps of the value chain, as the business heavily relies on technological innovation and user experience for its success (IE University, 2017). Through the digitalization and data analytics Zara is able to keep an agile supply and production cycle that meets the constantly changing needs of the demanding and instant-gratification-minded consumers (Megan, 2017).

While there is no doubt that the analysis of the data gathered has led to the efficiency of the supply chain that Zara has developed, there is also a focus on the analysis of the consumer. From its

headquarters in Arteixo, Zara is able to check each store’s ambient temperature, energy consumption and much more, even being knowledgeable about the average weight of residents in each store’s neighborhood to determine the size mix for every location (IE University, 2017). Through these processes and more, consumers are able to rely on the brand to meet their fashion needs via an in-store experience that is able to combine both the online and offline worlds to satisfy them.

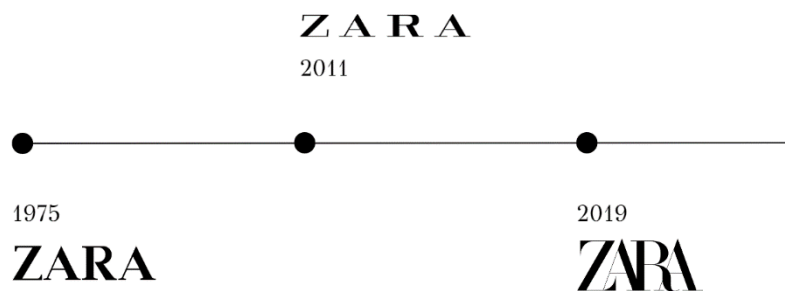
It is said that consumers would visit a Zara store an average of seventeen times per year, compared to four visits to the store of other fashion firms (Lopez & Fan, 2009). Thus, it is important to understand why. Not only has the company managed to provide a splendid delivery to the consumer, but it has managed to build an experience that makes consumers feel like, even though shopping at Zara is cheap, it does not feel like it (Tungate, 2005). This experience has also been influenced by the lack of traditional advertising, so consumers do not feel bombarding with brand messages, as Zara mainly relies on word-of-mouth and the store itself as its main communication tools (Mitterfellner, 2019).

Although, in the context of the twenty-first century where digitalization is one of the main components of society, it is unthinkable for a company which prides itself on being “forward-thinking” and relies on technological innovation to not have a presence on the online world and communities. The distinct brands that make up the Inditex group – Zara’s parent company – embarked on the online retailing adventure between the years 2007 to 2017 (Inditex, n.d.-b), with Zara opening its web in September 2010 in several European countries (Caesar, 2010). This also came with the presence of the brand in different online media channels – as per the reported data, in 2022 Zara presented 23.761M€ in net sales; 130.8M followers in social media; and 4.147M visits to the online store (Inditex, 2022a). This denotes the relevance that digital channels have in today’s retail environment, and also the high interest of consumers in the brand.

It all comes to show that, since the opening of the first store, almost fifty years ago, Zara has grown to become one of the biggest players in the industry of fashion through the implementation of different strategies. These have not only allowed it to achieve great awareness and visibility at a global scale – present in more than two-hundred countries (Inditex, 2022b) – but also build, develop, and maintain a brand image and personality that is communicated to its publics through a number of channels.

And even though it was its positioning as a low-cost fashion brand who presented the latest styles with great efficiency, the one that allowed Zara to grow as it has done over the past decades, this does not imply that changes in its strategy have not taken place. Some of the most noticeable – due to their relationship with the visual identity of the brand – rely on the change of logo and use of colors.

Figure 3
Evolution of the logo of Zara through time.



Source: adapted from García, (2022).

The brand has changed the logo three times since its creation. And the later presented a new concept that left behind the simplicity and minimalism of the previous logo in order to provide the brand with a stronger visual identity that was more recognizable and looked more sophisticated (García, 2022).

This alone might be considered as a relatively minor change within the company. But the addition of new product lines such as Zara Beauty, the creation of new limited edition or special collections like Zara Studio or Zara Atelier, the collaborations with other fashion houses like Narciso Rodriguez, and the latest change in the leadership of the company as a result of the departure of Pablo Isla and the establishment of Marta Ortega as chairperson, might all comply into the creation of a new image to the eye of the consumer. Consequently, they might perceive Zara as an elevated brand in relation to its competitors.

4.1 The current environment: PESTEL analysis

Now that an introduction to the brand considered has been provided, it is important to analyze different elements that surround it in the environments.

Positioning is closely related to the perception of the brand by the consumers, as seen in the first sections of this document. This perception is not only influenced by the actions of the brand itself, but also those of the competitors and the environment in which its activity is developed. Therefore, an overview of the main events that have taken place over the past years will be presented, to understand the changes in society and the industry that might be driving Zara's actions.

4.1.1 Political/Legal factors

Fashion is an ecosystem of made up of millions of people around the world, many of which are often overlooked, as people tend to put the focus on the beautiful garments produced and not those who create them (Alyssa Hardy, 2022). But this trend has changed, as consumers now have lower trust in brands and require them to be more transparent, including all creative integrity, sustainability, value for money, the rights of workers and labor conditions, data protection and authenticity, among others (Amed et al., 2019).

Thus, with the aim of solving some of the aforementioned problems and creating a more transparent industry, the European Union has developed a series of regulations on these regards. Over the past year, regulations that make it mandatory for the large companies to check and inspect if their suppliers are making use of child labor and damaging the environment have been implemented (Reuters, 2023). The European parliament has also established a set of regulations that aim to end fast-fashion – understood as garments produced at low costs, with low quality and a high volume of production –, which also includes the ban of the destruction of unsold textiles, a common practice in the industry (Kent, 2023b).

Not only that, since the pandemic erupted in mid-March 2020, there have been several changes in societies around the world. One of the most drastic ones is related to the increasing use of technology and the development of disruptive technologies like Web 3.0 and the metaverse, or the most recent Chat GPT. The previous existing privacy regulations and technological changes have led to the decrease in efficiency of paid digital marketing; so, companies are rethinking the way in which they digitally communicate with consumers (Amed et al., 2022). With new and rapid developments taking place, the industry understands that it should be a priority to set up consistent regulations that protect not only the consumers but also the companies making use of the latest technological services (TFL, 2023).

4.1.2 Economic factors

Up until 2019, the fashion industry was presenting a growth of 4% year-on-year at a global scale (McKinsey & Company, 2020). Due to the COVID-19 pandemic, and the consequent lockdowns and

halts in great part of the industrial activity, the different economies around the world were negatively affected. The financial effects of the pandemic were such that economist even compared it to 1929's Great Depression (Baskin, 2020).

Just as the fashion industry was starting to recover, in late 2022 the macroeconomic and geopolitical conditions deteriorated due the war in Ukraine (Amed et al., 2022), slowing the economic rebirth. The hyperinflation caused by the war and depressed consumer feelings resulted in declining growth rates in the second half of 2022, which were also affected by the energy crisis and the changes and pressures over different currencies, especially the euro (Amed et al., 2022).

Due to the prominent levels of uncertainty of the fashion sector, it is expected that the brands that will show better performance are the luxury fashion brands, as they tend to be less reactive to these events due to consumer loyalty and highly valued brand image (Amed et al., 2022).

Lastly, another important economic factor to take into consideration lies in the changes regarding the market-share of fast-fashion sector. Since 2019, an almost unknown e-retailer has more than quadrupled its revenue and with a higher market value than Zara and H&M combined, this is the case of SheIn (Ho, 2022). The brand has succeeded as an online retailer through the offering of extremely low-priced garments, extensive volumes and product ranges, and the gamification of the shopping experience, connecting with Gen Z consumers, who have allowed it to become one of the strongest competitors in the fast-fashion industry (Lieber & Chen, 2022).

4.1.3 Social factors

Society has changed since the outbreak of the sanitary crisis in 2020. For a time, people and consumers stopped their highly frenetic lives and put the focus on their own wellbeing and self-care. At the same time, this has led to the acceleration of many changes that were already under-way. The main one being the adoption of innovative technologies, from the use of AI to the commodities presented by the work-from-home modalities(Susskind et al., 2020).

As the pandemic was finally declared over (World Health Organization, 2023) and restrictions were lightened, old habits are expected to come back. This meaning that along 2023 it is expected that consumers go back to brick-and-mortar stores and increase their spendings, though they will be more cautious regarding the brands they choose, and they expect to find connected experiences that combine both the online and offline worlds (Chatterjee & Chickering, 2022).

Additionally, the luxury sector is also facing the boom of the resale markets. Many fashion houses and brand names have started to directly associate with these kinds of initiatives, such as Oscar de la Renta or Gucci. Secondhand luxury sales have seen an increase of 65% from 2017 to 2021 and is expected to continue growing (Mallevays, 2022). This presents a new opportunity for clients as secondhand luxury is normally a gateway for first time buyers that could not afford the products otherwise.

It all falls within the consumer tendency towards the consumption of "new luxury" (affordable luxury or premium products) and trading up. Looking for higher quality and better products at affordable prices. These activities focus on the consumer being willing to spend more money on superior products, without these being considered luxury as they lack some of the most important characteristics like social stratification (Kapferer & Bastien, 2009; Atwal & Williams, 2009).

Lastly, it is also important to take into account the tendency, specially of younger consumers, towards the use of gender fluid fashion and the breaking with the established social norms. This is even translated into formalwear, as shoppers rethink how they dress for work and other formal events (Amed et al., 2022).

4.1.4 Technological factors

The digital transformation has been accelerated due to the pandemic (Susskind et al., 2020). This has presented opportunities for the development and implementation of innovative technologies and techniques that will respond to the consumers' demand of an omnichannel experience (Amed et al., 2022).

The digital marketing spectrum is also expected to change due to this. Brands are now required to think about how they attract new consumers and keep the existing ones, as old techniques that focused on pushing content to pre-selected audiences do not show to be as effective. Hence, the focus now is changing towards the ideation of creative campaigns that will pull consumers into the universe of the brand (Amed et al., 2022).

The desires and expectations of consumers about the in-store experience and the combination of online and offline worlds has put pressure on retailers to implement the latest technologies, like artificial intelligence (AI), and Web 3.0 into the shopping experience (BoF Studio, 2023).

It is also important to consider the advancements and developments of new materials. Looking for more sustainable alternatives and innovations in the field, several new materials have been developed over the years. From spray-on fabrics, to mushroom or lab-grown leather, the discoveries and alternatives seem to be infinite. The sector for the development of next generation materials continues to grow, even though in 2022 it presented a drawback in value when compared to the year prior (Kent, 2023a), thus continuing to present and develop innovative ideas and solutions.

4.1.5 Environmental factors

As noted in the political and legal factors, different actions have been taken by the European Union with the aim of decreasing the damages that the fashion industry causes to the environment.

As Thomas (2019, p. 11-12) explains, consumers now buy up to five times more garments than in the 1980's, an overall of sixty-eight garments per year. Whilst different sustainability efforts are put towards greenhouse emissions, recycled materials, and circularity, many consider that the real problem of the industry lies in the consumption rate (Leach, 2022). It was precisely in the 1980's when the fast-fashion model appeared, with high volumes produced in record times and with low costs due to the outsourcing of the production (Thomas, 2019).

The production model that once changed the speed of the whole fashion industry, is now facing a threat due to the new regulations proposed. These mainly focus on the creation of more durable products that are easy to repair, reuse and recycle, as well as ensuring that the production process respects human rights, the environment and animal welfare (European Parliament, 2023).

4.2 What has been done?

As to gain more insight on the different activities that Zara has developed during the past few years – which might or might not be related to some of the topics mentioned above – a list of milestones² will be provided. As the analysis of the external environment mainly focuses on events that have taken place from 2020 onwards. Due to the great effects these still have on today's market conditions, the milestones considered will include the years 2020, 2021 and 2022, as 2023 was not available at the moment of writing.

As per reported on Inditex's Statement of Non-Financial information (2020, p. 8-11), most of the activities of the group – and therefore Zara – in 2020 were destined towards the support in the fight

² All milestones are obtained from Inditex's Annual Reports, thus some of the milestones included will consider the group, and not Zara as an individual brand.

against the COVID-19 pandemic, through the destination of funds, materials, and structures. The company also worked towards the achievement of its sustainability goals for the period, focusing on green energy and the use of more sustainable materials. Inditex also developed different activities focused on the impact in society, such as donating 875 thousand garments in collaboration with ACNUR.

In 2021, there is an important change to consider. The leadership of the company passed on from ex-CEO Pablo Isla to Óscar García Maceiras, who now leads the company along Marta Ortega as non-executive chairperson (though she was appointed in April 2022). During this period of change, some activities were continued, as Inditex collaboration with ACNUR. Others were introduced, such as the creation of a new building in Arteixo dedicated to the management of Zara's online channel, or the launch of Zara's own beauty line designed by British makeup artist Diane Kendal. Whilst the sustainability efforts continued through different activities such as the sign of the International Accord, new lines were also created, like Zara Athleticz, Zara Origins or Zara AZ in collaboration with ADER ERROR – the first collection of the brand available in the metaverse (Inditex, 2021).

As of last year, Marta Ortega was officially appointed as non-executive chairperson for Inditex. During this period, Inditex sustainability efforts continued to develop and included the investment in CIRC, a start-up focused on the creation of innovative new sustainable materials and fibers. Along these lines, Zara also collaborated with start-up Renewcell in a step towards sustainability, innovation, and circularity. This was also accompanied by the launch of Zara Pre-Owned in the United Kingdom. It was also through 2022 when Zara developed different collaborations such as with Narciso Rodríguez, The Good American (only available in the USA), the accessories collection *Song of the Earth* with designer Elie Top, the Zara Man collection with Studio Nicholson, or *Into the Night* with cooperation of model Kate Moss and photographer David Sims (Inditex, 2022a).

These actions showcase Zara's reaction towards events taking place in the environment surround it. The use of innovative technologies like the metaverse, the collaboration with designers and fashion brands to differentiate itself, or the response to the sustainability challenges. They are all actions that respond to a strategic decision made by the company, and they all influence the way in which consumers perceive the brand. Hence, they need to be taken into account, along with the findings of the analysis of Zara's communications performed next, to be able to arrive to informed conclusions about the possible repositioning of the brand.

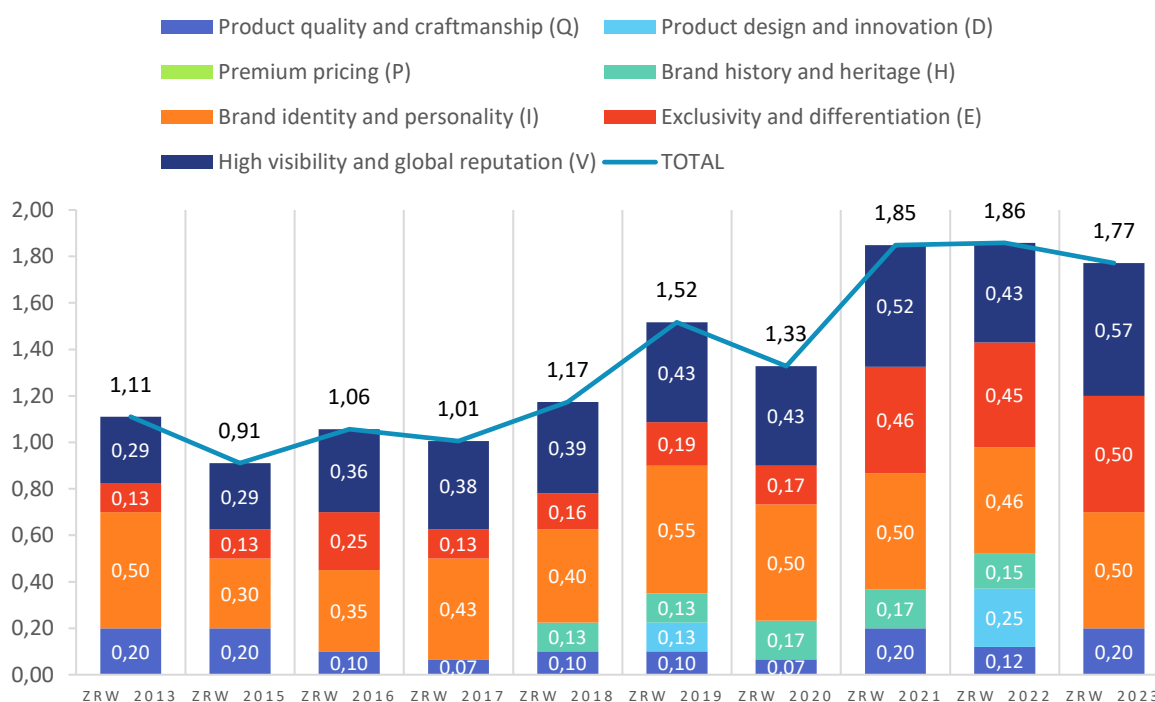
5 Results

5.1 Content analysis

As explained in the methodology, in order to understand the possible changes in the communication with the general consumer, a series of YouTube videos from Zara's own channel have been taken into consideration. Not only due to the benefits regarding the accessibility of the videos in the platform, but also taking into consideration the key role of content for current fashion brands, and the growing power of videos and fashion films in this regard (Rees-Roberts, 2019a).

Figure 4

Evolution of the presence of luxury characteristics in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. The diagram showcases the relative weight or presence of each luxury category in Zara's videos grouped by years analyzed. Each category is punctuated up until 1,00 points, which will be achieved if all elements are present in all videos considered for the year. Thus, the maximum score that would denote absolute presence of luxury in the communications for a year is that of 7,00 (1,00 per category studied).

As per the data gathered, it can be stated that there has been a presence of some luxury characteristics in Zara's communication since 2013, though it is seen that the presence of these elements has increased through years, including more characteristics as time passed. Other interesting information relies in the drastic increase or change that can be seen from 2021 onwards, as there is almost a 0,5 increase in the overall presence of luxury elements in Zara's communications, when compared to the previous years.

Those categories that have been present throughout all years considered include the brand identity and personality (I), the visibility and global reputation (V), the product quality and craftsmanship (Q), and the exclusivity and differentiation (E). While their share of presence in the videos has not always been the same through time, it is important to study the way in which they have been managed as

they might be recorded as a luxury characteristic but follow a different positioning strategy. This is, that they might have been recorded in the present analysis while the intention of their presence in the video was not to create a higher brand perception in the mind of the viewer and consumer. This applies to all categories and elements, and a further analysis shall be performed considering other factors of the corporate communication and strategy of the brand in order to obtain a more realistic picture of the drivers behind the introduction of these elements in the communication with the public.

An inquiring finding through this analysis lies on the lack of reference to pricing, whether this might be low or high, in the different content created by Zara in the past decade. Information on this topic was not found on either the visual images, the audio that went with them, the title of the video, nor the description box.

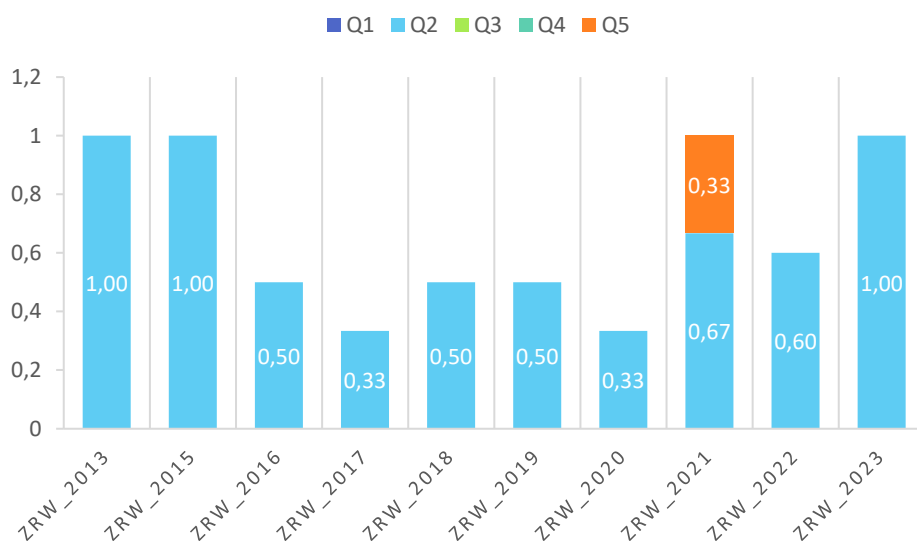
In the following pages of this document, an analysis of each individual characteristic, taking into account the different elements that each includes, will be conducted, in order to deepen the understanding of the elements that might lead to the perception of luxury through the documents analyzed.

5.1.1 Product quality and craftsmanship

Along the following section, an analysis of the presence of the different elements that have been included within the category *product quality and craftsmanship (Q)* is presented. In order to identify characteristics that might display the quality and craftsmanship of the products of the brand, there were five elements taken into consideration, as denoted in Table 2.

Figure 5

Presence of product quality and craftsmanship elements in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. The diagram presents the relative weight or presence of each of the elements included in the product quality and craftsmanship category. Therefore, the maximum score for each element is of 1,00, meaning that said element is present in all the videos analyzed for a specific year. The maximum score for a year is that of 5,00, meaning that all elements were present in all videos analyzed for the period (2013-2023).

These include references to the country of origin (CoO) of the products shown in the videos (Q1), whether written or orally communicated. As well as the use of closer camera shots that allow to better perceive the products shown (Q2), the quality of the materials, the stitching and other detailing that

might provide a better understanding of the conditions of the products. Then, other elements include the showing of procedures and actions involved in the production of said good (Q3), or the appearance of workers or artisans that might take part in the creation of the garments (Q4). Lastly, another element considered is the mentioning of any information about the materials being used in the collection presented (Q5).

This last element could also be considered as a denoting element for the following category, product innovation and design, if there were any innovative materials mentioned in the documents analyzed. As this was not the case, and little information was revealed on the matter, as it will be seen, it has exclusively remained part of this category.

The only elements that were found in different videos within this category correspond to close shots showing product details (Q2), and information about materials (Q5), as seen in Figure 5.

While close shots that presented details of products – whether these were shoes, garments, or accessories – were seen in a considerable number of videos analyzed (sixteen videos of twenty-eight studied); the presence of other product quality and craftsmanship indicators was almost null. The exception to this was found in video ZRW_FW_21_CG, in which the description box had a reference to one of the materials that was mostly used in the collection (Q5) – this being denim. Though this mention does not really provide information about the quality of the material itself, it falls within the element mentioned so needed to be included. Although some materials might be identified through visual references and cues in the videos, along with the closer product shots, this has not been considered sufficient information for element Q5 as there are different materials that might present a similar look and not be differentiated through visual references.

Regarding this category, it can be concluded that the brand does not try to portray the quality or craftsmanship of the products as one of the main value adding elements for the general consumer. The volume of garments produced by Zara on a yearly basis might be one of the determinant factors. It is also important to mention that, whilst there might be a number of close product shots recorded, they still do not imply the quality of the product in a great manner, as many of them might not be an ultra-close shot or focus on details that might comprise more information regarding the matter at hand.

5.1.2 Product design and innovation

A brief explanation and reflection on the findings on *product design and innovation (D)* analysis will be developed next.

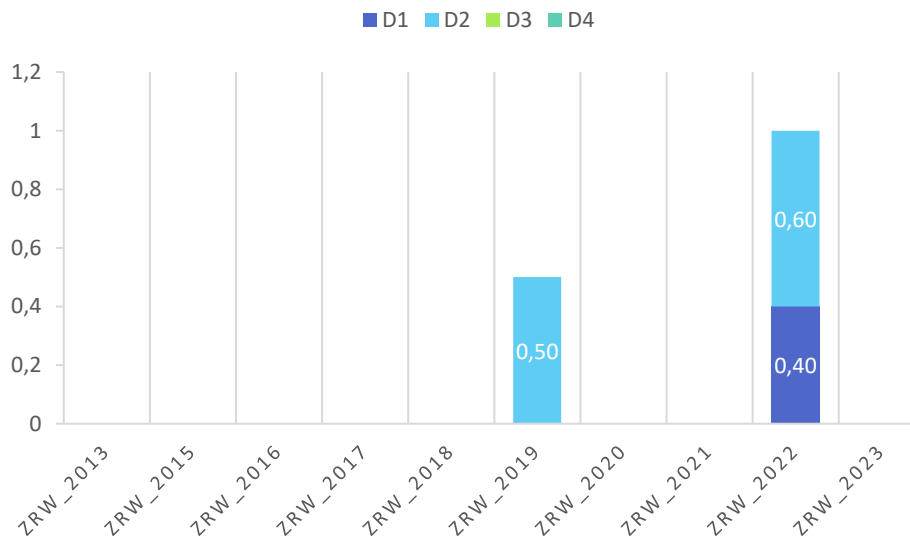
For this category, there have been four elements identified as representative or denoting of product innovation and design (Table 2). This category might be one of the hardest to identify, as product design can be considered quite subjective or not easily perceptible. Luxury fashion houses have traditionally showcased intricate designs that are original and innovative. But these characteristics can also be extrapolated to other areas other than design, such as communications or the production process. This category is of significant importance, as luxury brands have conventionally set the tone within the industry (Okonkwo, 2007).

The first element considered is related to the showcase of technological innovation or new techniques, whether in the production process (thus related to the Q3 element of the earlier category), or at any other point in the value chain (D1). It is important to not restrict this first element, to the production of the garments, but rather consider all stages of the value chain, including production, communication and retailing among others, as innovation can occur at any stage. Luxury houses are recognized by their ability to create a unique style that is easily identifiable through the designs produced, therefore the next element to consider is the display of these type of garments (D2). Similarly, this identity tends to be related to a specific designer persona working for the brand, therefore the creation of collections by renowned designers might help achieve a higher positioning

(D3). Lastly, different luxury brands have their own iconic products or designs, from the print of Louis Vuitton to Hermès Birkin bags, they are iconic recognizable products and designs that help prove the superiority of the brand (D4).

Figure 6

Presence of product design and innovation elements in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. As with previous diagrams, this displays the relative weight or presence of each element considered for each year analyzed. Therefore, each element is rated to a maximum of 1,00, when present in all the videos considered for a specific year. Each year has the possibility of achieving a total score of 4,00 if all elements are present in all videos.

As seen by the results obtained in the analysis, product design and innovation are not characteristics that have been highlighted through time in Zara's communication. In fact, there are only two years in which it could be appreciated. In 2019 the D2 element has been noted for the video ZRW_FW_19, as some of the designs presented are considered to be original, intricate, and recognizable. The same has been recorded for ZRW_SS_22_ST and the videos corresponding to the ADER ERROR X ZARA collaboration also in the year 2022. The classification of this element might be presented as some of the most difficult one to identify in the present study, but the main criteria followed was the easy identification or recognition of the garments. Though trying to be the most objective possible, the classification of this element might differ based on the knowledge and experience of the researcher performing the analysis.

In 2022 there is a recording of technological innovation and new techniques (D1) in two of the videos produced. Though they might not refer to the production process, as this element also takes into account other areas outside the creation of the garments per se, the element has been recorded due to the techniques used in the production of the video. In video ZRW_FW_22_AE_2, the presence of a robotic camera, the use of mirrors, and the filters applied had been considered as innovative in the presentation of the collection, as there is quite a strong technological presence. On the other hand, for the ZRW_SS_22_ST campaign, the innovation has been recorded due to the 2D technique employed in the production of the video in order to allow it to be presented as a moving painting.

Although in the corporate statements about the brand some of its personality traits could be related to innovation and technological advancement, this has not yet been translated into the production of their campaigns.

5.1.3 Premium pricing

As stated, an interesting finding that this research has provided is the lack of information on product prices (P1) in the presentation of the collections' campaigns through Zara's official YouTube channel. So, the inability to determine the actual price or price range might lead consumers to assume that the prices would be similar to those that are usually found in stores, therefore missing the perception of luxury. Interestingly, this might have the opposite effect and lead to consumers wondering about the monetary value of the garments presented, which they might perceive as superior due to other elements found in the video, and thus force them to visit other channels of the brand to obtain this information.

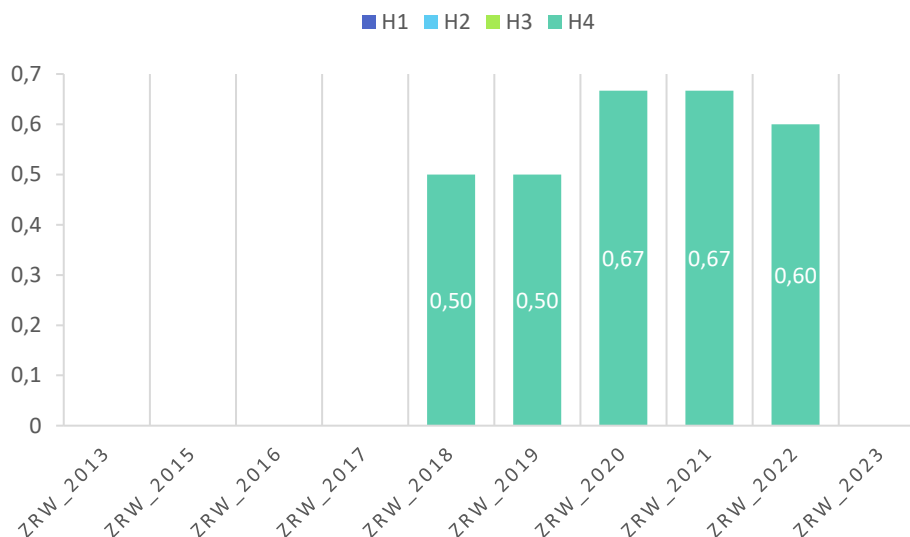
5.1.4 Brand history and heritage

Though closely related to the brand identity, the *brand history and heritage (H)* will now be analyzed to better understand the findings of the analysis of the elements proposed for this category (Table 2).

Accordingly, the elements considered include references to the region where the brand was founded (H1) and references to the founder himself (H2), whether these are through images, text, or audio, as they will relate the brand to its origins, emphasizing the time passed since then. Other elements considered include the use of timelines (H3) as they are a graphic representation of the evolution of the brand overtime. Lastly, the use of filters and visual elements and styles that might reference to past decades and times will also be considered (H4). Even though this last element could be closely ligated to the stating and styling elements of the campaign and not have the intention to put the focus on these brand characteristics, it might create an association in the mind of the consumer if often used.

Figure 7

Presence of brand history and heritage elements in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. The diagram shows the relative weight of each element considered. The maximum score for each element is that of 1,00, while the maximum score for the year is a maximum of 4,00, as with previous diagrams.

Zara is quite a new brand, only being present since 1975, therefore the lack of elements that display the brand's heritage and history is not surprising. In fact, the only element that has been recorded is the visual reference to past times (H4), and while in some cases, such as ZRW_FW_21_CG it has been recorded due to the use of filters that replicate the effect of old video cameras, in others, such as

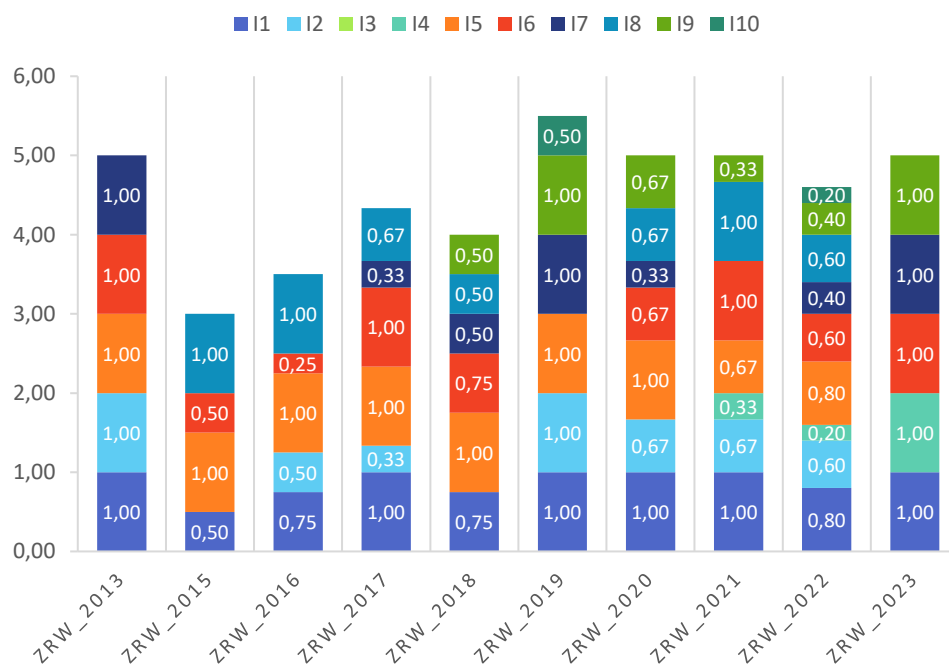
ZRW_FW_19 it was recorded due to the apparent replica of these different eras for storytelling and staging purposes. Thus, none do directly refer to the origins of the brand, but rather employ these different aging techniques in order to display the garments and items that form the collection within the appropriate settings for the styling or story proposed.

5.1.5 Brand identity and personality

In order to better understand the findings relating to the *brand identity and personality (I)*, there is not only a graph containing the weight of each of the elements included this category for the corresponding years. An analysis of the frequency with which each of these elements appeared in the videos has also been included, as this category implies a substantial number of elements and might be difficult to understand without this additional information. As for the main elements considered for the analysis of the identity and personality, they are all included in Table 2. They mostly relate to the presence of the logo or any other brand signifier (I1, I2, I3); audio or camera shots that denote a closer and personal relationship, or a cold impersonal one with the viewer (I4, I5, I6, I7, I8); and the recreation of myths, fantasies or presence of other art forms (I9, I10), as they tend to be commonly used by luxury brands (Okonkwo, 2007).

Figure 8

Presence of brand identity and personality elements in Zara's videos from 2013 to 2023.



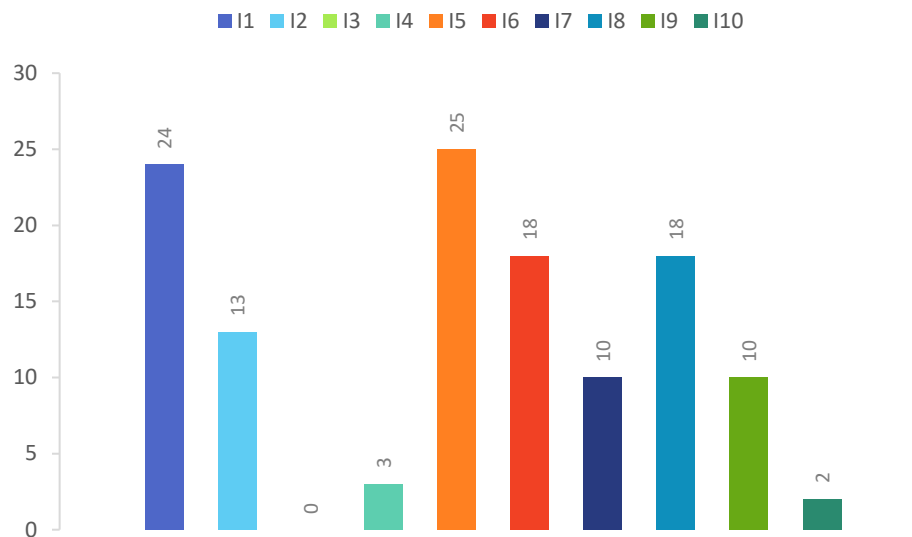
Source: own elaboration.

Note. The diagram shows the relative presence of each element per year. So, a rating of 1,00 in an element shows that it is present in all the videos considered for said year. Each year can achieve a maximum score of 10,00 if all elements are present in all videos considered.

Brand identity and personality has been the most frequent and most prominent category found in the videos analyzed, independently of the year of their production. It might be noted that those years with a higher relative presence of the category brand identity and personality correspond to 2019, 2023 and 2013, but over the most recent years a wider variety of elements that relate to this category have been found.

Figure 9

Frequency of brand identity and personality elements in the videos analyzed.



Source: own elaboration.

Note. The diagram showcases the frequency with which each element is present in the total of videos analyzed, without considering the timeframe.

The second most common and recurrent element was the presence of the logo during the video (I1), whether it was shown at the beginning, as the last shot, or during the development of the action. There have only been four videos in which this element could not be applied: ZRW_FW_22_AE1, ZRW_FW_18_LB, ZRW_SS_16 and ZRW_FW_15.

The presence of brand colors during the videos is recorded in thirteen of the twenty-eight units of study. As Zara is mainly characterized by black and white colors, the recordings were made when there was a predominance of such tones, as they are common to be found in any kind of communication due to their basic or neutral nature. Hence, those videos in which black and white filters were applied, or in which there was not much color presence, or vitality have been recorded as such.

The most common feature of the campaigns developed by Zara over the past decade relies on the use of sound that does not directly address the consumer. This meaning that the main auditory stimuli rely on the use of different songs, whether acoustic or not. It is only in three occasions that the consumer is directly addressed through audio, this being on the latest studio collection (ZRW_SS_23_ST), the collaboration with Kaia Gerber (ZRW_FW_22_KC), and the studio collection of 2021 (ZRW_FW_21_ST). Though price is not stated or referenced to in any of these videos, the studio collections of the brand, as well as the collaboration with the North American model, are known to be higher in comparison with the prices that are normally set to the brand's products. Therefore, a further analysis should be performed in order to understand if there is any relationship to be found in the use of auditory stimuli that creates a deeper connection with consumers by allowing them to feel part of the story in higher-priced collections in the communications over the most recent years.

Other elements that tend to be more present towards the later years are the development of myths and fantasies (I9) and the use of other visual art forms (I10) in the communication of the collections. This is due to the fact that since 2018, approximately, Zara has included a deeper storytelling into the presentation of the woman collections. From the settings to the action being developed, the viewer can feel like they are getting to know the history behind the models presented to them (ZRW_SS_18), they are part of an ancient civilization from the areas of Egypt or Central Asia (ZRW_SS_21), or recall

adventures once lived with a lover through the story being told to them (ZRW_FW_22_KC). The study of each of these individual stories might require an analysis of its own in order to pay attention to all the elements that are present in the development of the storytelling that led to the creation of the fantasy that consumers perceive through the recordings.

Similarly, the type of shots and angles used help figure out the tone of the story as well. There have been a number of videos in which the presence of close shots (I7) has been notorious enough as to provide a sense of personal and warm relationship existing between viewer and brand. These have been present through different videos and years, but it is in the later years where they seem to be most commonly used. Nevertheless, in earlier times videos were more characterized by the impersonal relationship (I8) established between brand and consumer, though they are still more used than the aforementioned. Lastly, another element that invites the consumer to feel part of the story being told is the direct gaze of the model to the viewer (I6), which is present in most videos (I8), demanding the consumer to pay attention, due to the correlation existing between eye-contact and demand behaviors (Nervino, 2018).

Therefore, the presence of elements that denote the brand identity and personality is not something that has started to be adopted in most recent times, but there has been an increase in the ways and elements through which it might be represented. This can be corroborated by the increasing use of storytelling to present the collections and the establishment of a closer relationship with the consumer. This all might lead to a more aspirational perception and idealization of the brand; so, viewers could be more willing to pay higher prices for garments shown or have a better or superior image of the brand in question (Keller, 2009).

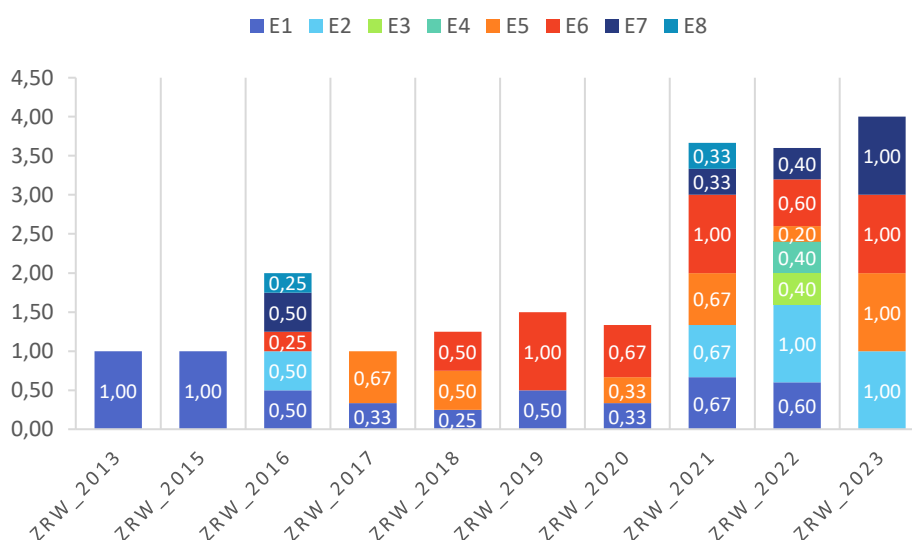
All taken into consideration, it is important to note the lack of explicit mentioning towards the mission, vision, or values of the brand, which have not been identified in any of the twenty-eight units analyzed. Though they might be implicitly communicated, this implies that viewers have to be able to decodify the implicit messages to understand the core identity of the brand.

5.1.6 Exclusivity and differentiation

Similar to the previous section, due to the number of elements needed to be taken into consideration for the analysis of this category, this section will also include an analysis of the frequency with which these elements appeared on the different videos.

Figure 10

Presence of exclusivity and differentiation elements in Zara's videos from 2013 to 2023.

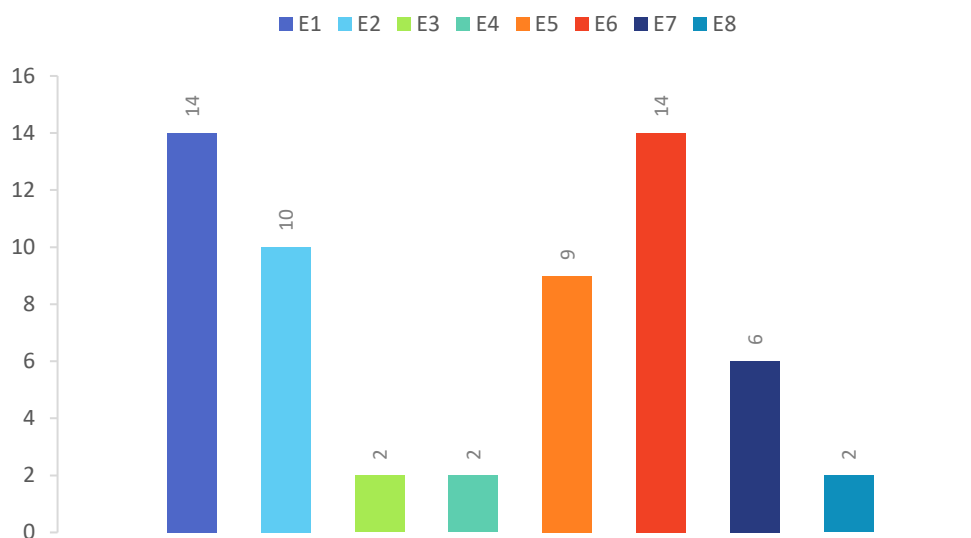


Source: own elaboration.

Note. The diagram shows the relative presence of each element for each year considered. A maximum score of 1,00 is provided when the element is present in all videos considered for the specific year. A year can achieve a maximum score of 8,00.

As it can be perceived in Figure 10, elements that highlight exclusivity and differentiation have increased its presence on Zara’s communications through the years. Whereas it was merely noticeable in the beginning of the decade, today this category is almost an imperative in all productions taken into consideration. It is important for luxury brands to create a sense of inaccessibility; they need to be known by consumers, but consumers need to perceive them as an aspiration that only a few selected people can afford. This exclusivity is also very related to differentiation, as things that are out of the ordinary and that cannot be found elsewhere tend to feel more unique (Okonkwo, 2007; Fionda & Moore, 2009).

Figure 11
Frequency of exclusivity and differentiation elements in the videos analyzed.



Source: own elaboration.

Note. The diagram showcases the frequency with which each element is present in the total of videos analyzed, without considering the timeframe.

The most common elements correspond to the use of renowned fashion photographers and art-directors (E6), as well as the lack of direct purchase call-to-actions (E1). The presence of the latter might give a sense of availability that could lead to a lower positioning (in terms of luxury branding) of the company. But while this might have been a conscious decision during the later years, it might have not been so in the earlier ones. This conclusion is come upon due to the lack of information in the description boxes, and the short experience of the brand in the digital context over the first years that are being analyzed – its first video being uploaded to the platform only three years prior –. Nonetheless, by also analyzing other indicators a realistic conclusion can be achieved, as it will be seen later in this study.

Another crucial element is the presence of special collections (E2), which might include limited edition collections in collaboration with other brands and personalities (E3), as well as special lines developed by the brand such as Zara Studio. The ten recordings of this element all correspond to the last three years (2023 being included), with the addition of a video promoting Zara Studio in 2016 and a limited-edition Sport collection in the same year. Even though there are known collaborations and special collections which have not been included – such as the promotional videos for The Good American X Zara collaboration (only available in the USA), or the Zara Atelier lines due to their absence on the

YouTube channel – there is still an emphasis put on the strategy being followed by Zara through the creation of special collections in recent times.

One of the indicators that have shown to have a lower presence includes the recreation of fashion shows (E4). This is due to the fact that not one collection was presented as such, at least in the traditional conception of the term. The recordings for this element include the collaboration between ADER ERROR X ZARA (ZRW_FW_22_AE2) and the fall Studio collection of 2022 (ZRW_FW_22_ST). They do not portray traditional fashion shows per se, but the feeling and aesthetics of the videos might somewhat recreate this sensation. It is important to understand that the current conception of the fashion show has evolved from its traditional expression. It has now become a statement of the brand identity and an element of entertainment. This might help into the perception of said videos as related to a fashion-show atmosphere.

Another essential element that denotes exclusivity and differentiation is the presence of low angles in the production of the campaigns (E5). This is due to the fact that by giving the illusion of looking up the viewer perceives the brand, in this case Zara, as superior, being the one that holds the power over the situation (Nervino, 2018), thus leading towards a feeling of aspiration and admiration. From all the videos analyzed, this element might be best represented in Zara's fall/winter 2020 campaign (ZRW_FW_20).

Lastly, the use of supermodels also denotes a sense of exclusivity and superior positioning in fashion (Okonkwo, 2007). Though deciding who might be considered as a supermodel or fashion celebrity might present itself as a challenging task, personalities renowned in the world of fashion such as Kaia Gerber, Sasha Pivovarova, Raquel Zimmermann, Precious Lee, Edie Campbell, Mica Argañaraz, Rianne Van Rompaey, or Jessica Stam have been identified and categorized as such.

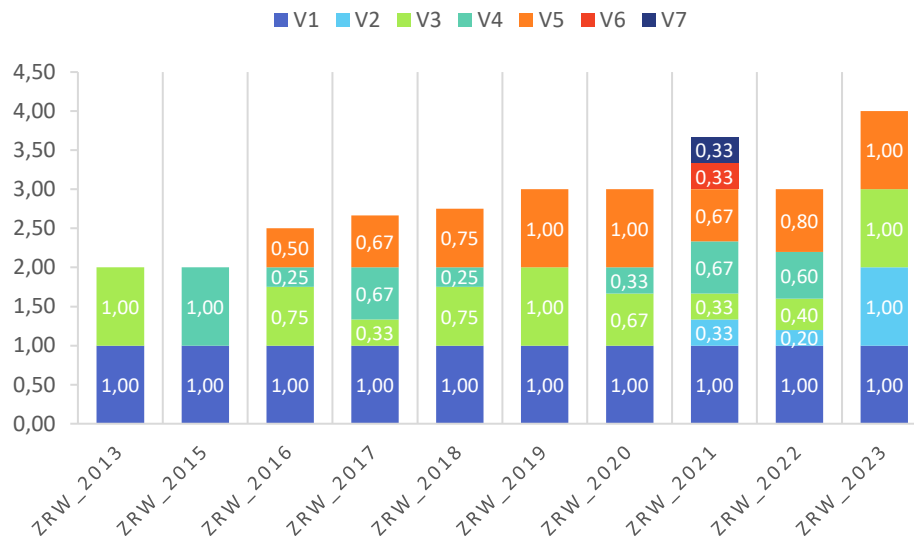
Studies find that the use of French is related to a higher positioning in fashion, as it is the native language of the country of origin of most luxury fashion houses today, which also have a great history (Amatulli et al., 2016). Therefore, it was thought to be curious to analyze if there was any presence of this language in the communications of the collections. The results highlighted the use of French in two videos specifically. One of them being the studio collection of 2016 (ZRW_FW_16_ST), in which it can be appreciated that the lyrics of the music playing use the French language. The other one, and probably most notorious, involves the studio collection of 2021 (ZRW_FW_21_ST), in which fashion model and icon Marisa Berenson speaks in French directly to the viewer, above voices of other models in the campaign speaking in English. It shall be noted that both instances in which this language was used were related to the promotion of Studio collections, which are known to be perceived as higher priced and superior to the regular collections of the brand.

5.1.7 High visibility and global reputation

Similarly, and due to the presence of *high visibility and global reputation (H)* throughout the years, the initial analysis has also been deconstructed into the analysis of the frequency with which each element has been identified through the different documents considered.

Figure 12

Presence of high visibility and global reputation elements in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. The diagram showcases the relative presence of each element per year considered. Thus, a rating of 1,00 for an element means that said element is present in all the videos considered for a specific year. The maximum rating than a year can achieve in this category is that of 7,00, meaning that all elements are present in all videos.

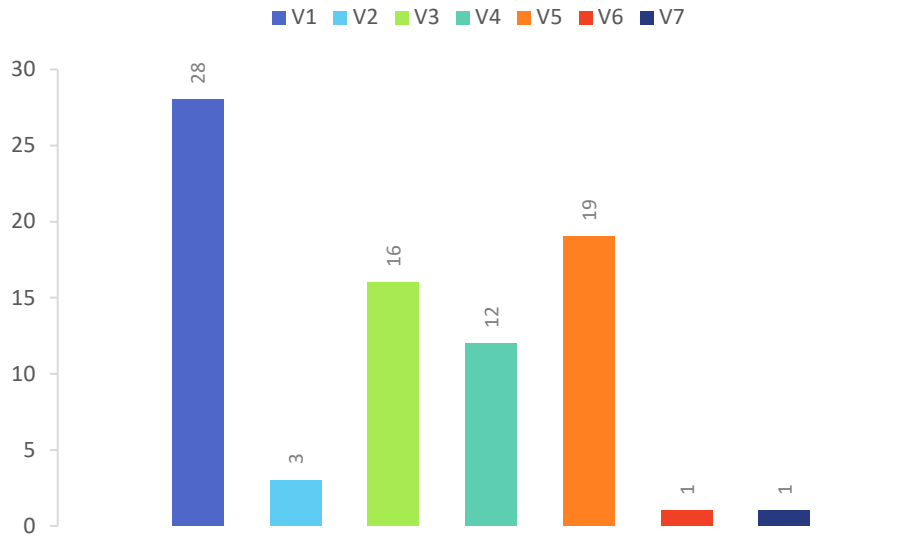
The different elements that have been taken into account in order to measure the high visibility and global reputation (V) of the brand are perceived throughout the years and have been quite constant over time. This does not mean that their presence has increased in the most recent era.

The element with the higher frequency, not only within this category but overall, in the analysis, has been the use of written English as default in order to communicate with consumers (V1). This is due to the fact that all video descriptions are written in English, as well as the titles of the videos themselves, and also any kind of information that appears as words on the screen while the video is playing. Even though the use of oral English by default (V2) in the communications (without taking into account song lyrics) has a lower frequency, it needs to be taken into account that the total number of videos in which there was an audio that directly addressed the viewer is that of three, therefore meaning all communications are set in English.

It should be noted that in the 2018 Spring/Summer campaign (ZRW_SS_18) soft, distant whispers can be heard in the background and although the language has not been identified, taking the previous information into consideration, it could be considered that it is also the English language that is being used. As this is background noise and does not directly address the viewer it has not been given more importance as to determine the language used.

Figure 13

Frequency of high visibility and global reputation elements in the videos analyzed.



Source: own elaboration.

Note. The diagram showcases the frequency with which each element is present in the total of videos analyzed, without considering the timeframe.

The inclusion of people with from different races and ethnicities (V5), is something that has been always present in most communications. Though the level of representation might be low, as most of the time there is a higher presence of white and Caucasian models in comparison to those from a different race and origins. Therefore, this might lead to the interpretation that the brand is to be used by a certain stereotype of people, which might limit its global presence as perceived by viewers. But the lack of representation has become uncommon in recent years, with the exception of collections that have been created in collaboration of personalities like Kaia Gerber (ZRW_FW_22_KC) or Charlotte Gainsbourg (ZRW_FW_21_CG), in which they are the only people shown presenting the collection. Furthermore, it is the latter collection mentioned, in collaboration with actress and director, Charlotte Gainsbourg, the only one that has been identified as a collaboration between Zara and another brand, artist or celebrity that does not come from the fashion world (V7), and the only one in which a non-fashion celebrity is the model for the campaign (V6).

Lastly, in order to determine the apparent global presence of the brand through the analysis, there were two main elements taken into consideration. If the video was set in an “outside” location (V3), or if it was rather filmed in-set (V4). The outside locations do not only reference to those in exterior settings, but also those that might have been filmed in an interior location different from a set, such as the fall/winter campaign of the year 2018 (ZRW_FW_18) or the same campaign from a year later (ZRW_FW_19). In both cases house-like or even palace-like settings can be seen, creating a campaign that leaves behind the closed and local perception of the set location without including an external setting – the location will be external to the brand’s own facilities as they might have travelled to it, but not physically located outside. There is quite a balance between these two elements, being sixteen the videos that resonate with element V3, and twelve those that resonate with element V4, so even though there is a slight difference in favor of the globalized vision of the brand, it shall be considered insignificant unless there are no other factors and documents being taken into account that corroborate the global presence of Zara. This does not mean that the brand does not hold a global presence and is perceived as such, but rather that the information by the analysis of these two elements alone is not significant enough and needs from the consideration of the other variables

analyzed throughout this document, as well as it might need from other information, in order to arrive to a definite conclusion.

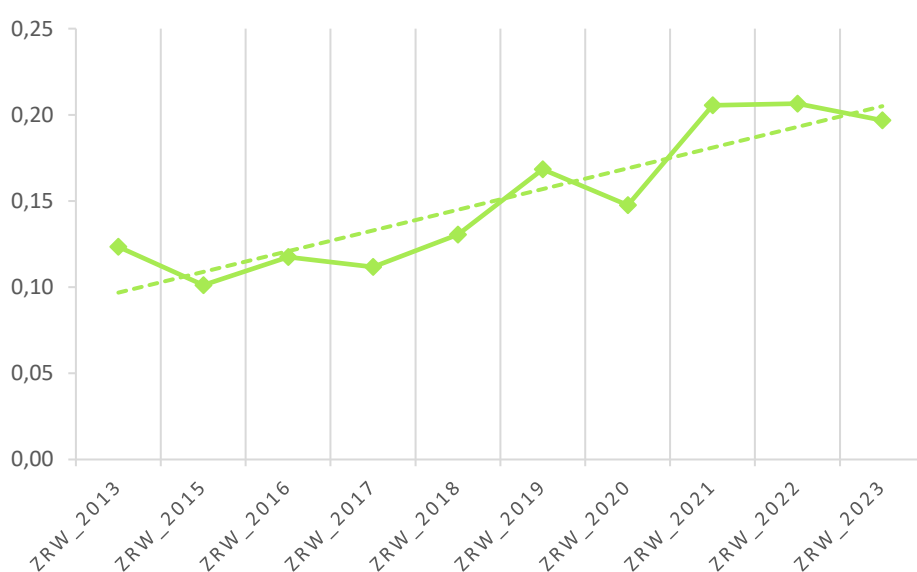
6 Discussion

After developing the present analysis, along with the identification and definition of the main environmental forces and activities developed by Zara in the past years, the results will be discussed upon.

The main element to consider relies on the positive trend that Zara has showcased regarding the presence of luxury characteristics in its communications, as it can be seen in Figure 14. Though elements that have been identified as characteristic of the luxury sector have always been present in the time period studied, there has been an increase in frequency and quantity. This meaning that throughout the years there have been more elements identified, which had not been identified before, and some have become more frequent, being present in almost all videos considered.

Figure 14

Evolution of the presence of luxury in Zara's videos from 2013 to 2023.



Source: own elaboration.

Note. The graphic showcases the total value of all categories and elements present for each year, as well as the overall tendency followed by Zara. ³

Whilst there is no drastic change identified in the analysis, it is important to consider that the positive tendency towards the introduction of luxury elements, and the difference from 2021 onwards, might denote that Zara's communications have changed. 2021 presented an increase of 0,5 on the overall presence of luxury characteristics in Zara's communications when compared to the previous year. While it might not seem like a radical increment, it represents the higher year-on-year increase, with a value of 0,52, while the second higher is only 0,34 presented in the year 2019⁴.

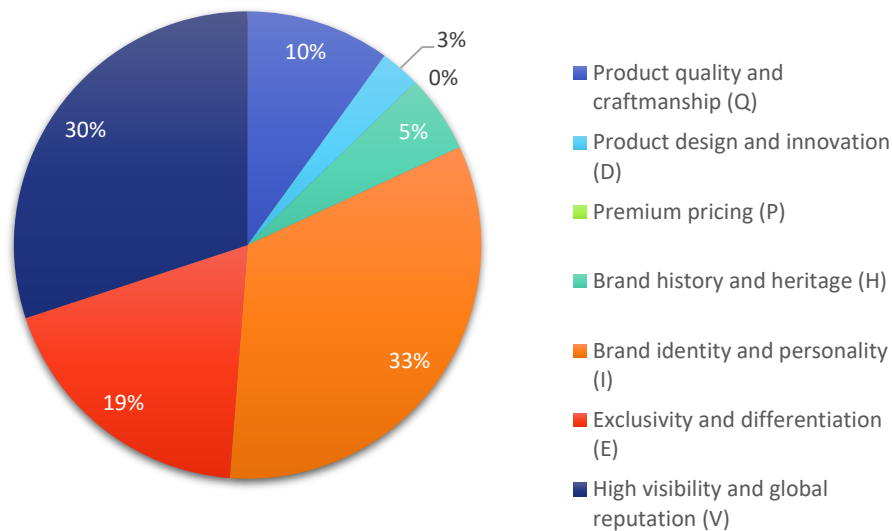
Therefore, according to the initial objectives set in the introduction of this research, it can be said that there has been a change in Zara's communications, from the luxury elements included in the videos, to the overall aesthetics that they present. Just by comparing the first and last videos considered for the study – ZRW_SS_13 and ZRW_SS_23_ST respectively – an evolution can be perceived whether or not related to the principal matter of this study.

³ This is a simplified version of Figure 4. The data here has been calculated as a percentage based on that obtained from the aforementioned figure.

⁴ These have been calculated according to the Total data presented in Figure 4.

As there have been many elements and categories taken into consideration for the performance of this study, it was also important to find which were identified as the most prominent or relevant ones. The relevance of each category has been represented in Figure 15.

Figure 15
Relevance of each category in the total videos analyzed.



Source: own elaboration.

Note. The diagram showcases the relevance of each category considered in the study based on the frequency with which their elements were present in the videos analyzed.

Accordingly, the study has led to the identification of brand identity and personality (I) and high visibility and global reputation (H) as being the most important categories. They have been present in all videos analyzed through the past decade, from the inclusion of the logo to the easy identification of the brands' products and the personality traits showcased through the use of different audios or shots. The global reputation and positioning that the brand has had since its international expansion began in the beginning of the century, has also been constantly reflected in the videos through the use of English or the representation of different ethnicities and races. The brand identity itself and the globalization of Zara are two of its main characteristics, so it does not come as a surprise that these are the most frequent or relevant categories.

Opposing to this, the premium pricing is presented as non-existing. Zara does not make any reference to its pricing along its audiovisual communications. This might work as a strategy that leads to consumers focusing on the storytelling of the video and the intangible elements that they might perceive, therefore not interfering with the creation of a higher brand-positioning. Zara's prices are still considered to be quite low, with most of the assortment not surpassing or coming near to 100,00€, with the exception of special collections such as Zara Atelier or Zara SRPLS. Though this is a conclusion derived from the author, it might serve as an explanation for the lack of information on the pricing policy of the firm.

As exclusivity and differentiation (E) has become the third most relevant category, it is important to mention that it is partly due to the creation of special collections. These are normally shot by some of the most prestigious names in fashion-photography, like Steven Meisel and Fabien Baron, so Zara's communications achieve a more aspirational aura and tone than those previously created. Going back to the explanation provided in [section 5.1.6](#) of this document, the lack of direct purchase call-to-actions might have not been necessarily the result of a strategic decision in the initial years, but rather the lack of information regarding the possibilities provided by the platform. Similarly, the use of brand

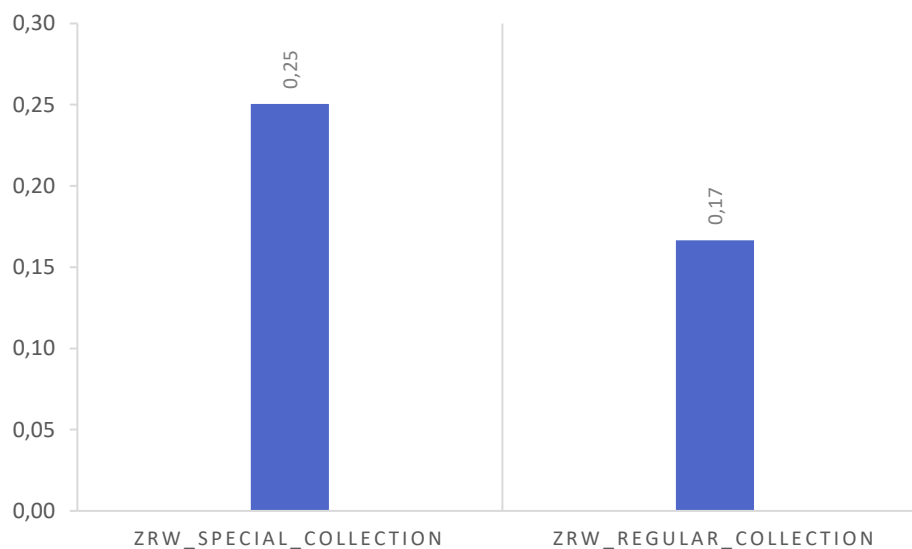
colors in regard to brand identity, or the recreation of past times in brand heritage, might not be a direct decision focused on communicating luxury through the videos created. Though they might just be coincidental and not conceived for this specific purpose, they are recorded in this initial analysis on the matter as a reflection of luxury. Because even if not planned, they might have an influence on the perception of the brand.

It has also been noted, especially when considering the different activities carried out by the brand over the past few years (as showcased in [section 4.2](#)), that Zara has been introducing many different collaborations and special collections. The differentiation of these collections from the regular garments produced by the brand, creates a sense of limited availability and exclusivity, which help in the establishment of these collections as “superior”. Due to the high frequency with which they have been produced over the past three years, they have also become a key role in the positioning of the brand.

Even the communications of said garments denotes a sense of luxury, as appreciated throughout the analysis. Thus, in further examination of the case proposed, Figure 16 presents a comparison of the presence of the luxury elements in special collections, versus the regular campaigns. It is important to understand that, even though the special collections found in this analysis have mainly occurred since 2020 – as a peak in Figure 4 and Figure 14 appeared – it does not imply that all luxury elements for the period were identified in these videos. This meaning that luxury elements were shown in both, regular and special collections all through the period proposed in the analysis. But their frequency of appearance in special collections has come as an interesting finding. From the use of French to the presence of fashion personalities and celebrities, even with the creation of softer and more personal communication styles, the videos that present special collections have a higher relative weight of the elements denoting luxury as seen.

Figure 16

Comparison of relative presence of luxury characteristics in videos that show special and regular collections.



Source: own elaboration.

Note. The diagram shows the comparison between special and regular collections in terms of presence of elements that denote luxury. It has been calculated as a percentage, thus 1,00 would signify that all luxury elements are present in all videos considered.

The last objective set focused on the idea of identifying the drivers for the changes in Zara’s communications, changes which have been found mainly around 2020 and 2021. These were

challenging times for any industry and company. The COVID-19 pandemic marked the year 2020. Since its outbreak in March, companies had to adapt and evolve to the new reality that society was facing. With this, Inditex – therefore Zara – started and took part in a set of initiatives to fight against the virus (both social and environmental), from donating money and materials to collaborating with the different sanitary institutions and governmental bodies (Crespo Pereira et al., 2022). The sanitary crisis and the lockdowns that were imposed in many areas of the world led to a halt in many commercial activities thus appearing the world in an economic crisis that would still be present in the years to come (Craven et al., 2022).

The pandemic also led to the acceleration of many transformations. The digital transformation being one of them. During lockdowns people and organizations started to rely on the use of technology to communicate and keep entertained. TikTok is just one of the greatest examples (Koetsier, 2020). But in the world of e-retailing, another phenomenon was starting to arise. Shein was able to quadruple its revenue since 2019, being the favorite fast-fashion brand for Gen Z. The impact and popularity of Chinese e-retailer was such that it surpassed the market value of Zara and H&M combined (Lieber & Chen, 2022).

Consequently, Zara was presented with an environment in which it was no longer the strongest competitor. A new scenario in which sustainability is also playing a key role, with a raising interest and new regulations that are determined to “end fast fashion” as one of the solutions. Not only that, but the uncertainty of recent years due to the pandemic, the economic crisis, the war in Ukraine, the energy crisis..., has presented a scenario in which luxury brands seem to be the least affected (Amed et al., 2022). It is understood that luxury brands invest many efforts and resources in building their identity through all elements included in the branding strategy, it is through that identity that they justify a higher pricing. And it is understood that those companies that develop stronger brands are the ones that will hold the competitive advantage and positioning when compared to companies that are merely linked to products (Okonkwo, 2009b). Therefore, by building a stronger brand, with a higher positioning, Zara would be able to face many of the challenges presented through the years.

Additionally, it was around this time when important internal changes were detected at Inditex and Zara. In 2021, ex CEO Pablo Isla left the company in favor of Óscar García Maceiras, who now leads the company alongside Marta Ortega, who was appointed non-executive Chairperson in 2022. A 5% rise in prices (only 2% in Spain) as the result of the Ukrainian war, a change in the corporate image, and the change in the discourse of the brand, from efficiency and operations, towards the intangibles like beauty, people, design, and fashion (I.P.G., 2022).

While they might seem innocent changes when analyzed individually, taking into account the environmental context, and the evolution of Zara’s communications through times, it could be determined that Zara is trying to escalate its positioning.

7 Conclusions

Consequently, and summarizing all elements considered, it could be said that Zara seems to have changed its strategy from 2020 onwards.

It could be said that the position as the fast-fashion giant was no longer of interest for the Spanish brand. This being due to the variability of the current environment, the rise of new competitors and new legislations, among many other factors considered. The opportunities presented by leveling up the positioning are many, from stronger brand identity that helps in the face of a crisis, to lower negative associations in terms of sustainability. Changing towards a luxury positioning could be Zara's answer to many of the challenges faced.

The evolution of its communications might also denote so. Through the implementation and introduction of elements that increase the sense of exclusiveness and help differentiate the brand in a saturated market, or just with the easy identification of the brand's identity and personality through its imagery and diverse types of content. There has been a rise in the frequency with which luxury characteristics are represented in Zara's communication, and also an increase in the different elements considered.

As this study counts with different limitations, from the elements analyzed and considered to denote luxury, the corpus of the analysis, and the lack of other corporate communication elements being analyzed, it can be presented as a starting point in the study of this matter. Positioning and communication are not only influenced by communications with the end consumer, or factors of the external analysis. Being able to perform an internal analysis of the company in order to determine the abilities of the brand and the efforts that it might be putting towards its repositioning could add immense value to this investigation.

But let's not forget that positioning is closely related to the perception of the brand in the consumers' mind. Therefore, in order to truly prove the findings in this research and come to a real conclusion regarding the positioning of the brand, a further study involving interviews or questionnaires, as well as other methods that allow to determine the perception that consumers have of Zara, and even compare it to the perception they had a few years ago, could offer new information on the topic at hand, and allow to prove if the changes presented have the expected results.

It is therefore considered that the initial hypothesis: Zara is following a luxury positioning strategy, is partially confirmed. As positioning involves many elements other than communications, it will be wrong to assume that Zara is following a luxury positioning strategy, even if the communications portray so. Especially when considering that due to the limitations of this study, not all brand communications have been analyzed. But, taking into account the elements studied, it could be stated that there have been changes in the direct communications with consumers that might imply that the brand is trying to achieve that. Earlier in this study, different luxury segments were explained (Figure 1). At the moment, Zara might not be able to be considered a supreme or lifestyle luxury as it lacks some of the characteristics – mainly product quality and craftsmanship (Q), product design and innovation (D), and brand history and heritage (H). But it could fall within the *Masstige* category presented. This dictates the lower status within the luxury segments classification, but it is, in fact, the one to which Zara might be closer to.

“Premium” might be the new word used to refer to the company from now on, as it finds itself in a medium sector between luxury and fast fashion, which is represented through its aesthetics and communications, as it falls under the direction of Marta Ortega (Pérez Méndez, 2021).

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XBgNJSkx8Z6xYT8RoCp2EQAvD_BwE

Appendixes.

Appendix I: Coding results (pt. 1)

CATEGORY	CODES	ZRW_SS_13	ZRW_SS_15	ZRW_FW_15	ZRW_SS_16	ZRW_FW_16	ZRW_FW_16_SP	ZRW_FW_16_ST	ZRW_SS_17	ZRW_FW_17_ED	ZRW_FW_17
Product quality and craftsmanship (Q)	Q1										
	Q2	X	X	X	X			X	X		
	Q3										
	Q4										
	Q5										
Product design and innovation (D)	D1										
	D2										
	D3										
	D4										
Premium pricing (P)	P1										
Brand history and heritage (H)	H1										
	H2										
	H3										
	H4										
Brand identity and personality (I)	I1	X	X			X	X	X	X	X	X
	I2	X					X	X	X		
	I3										
	I4										
	I5	X	X	X	X	X	X	X	X	X	X
	I6	X	X				X		X	X	X
	I7	X									X
	I8		X	X	X	X	X	X	X	X	
	I9										
	I10										
Exclusivity and differentiation (E)	E1	X	X	X	X			X		X	
	E2						X	X			
	E3										
	E4										
	E5								X		X
	E6							X			
	E7						X	X			
	E8							X			
High visibility and global reputation (V)	V1	X	X	X	X	X	X	X	X	X	X
	V2										
	V3	X			X	X		X			X
	V4		X	X			X		X	X	
	V5				X	X				X	X
	V6										
	V7										

Appendix I: Coding results (pt. 2)

CATEGORY	CODES	ZRW_SS_18	ZRW_SS_18_ED	ZRW_FW_18	ZRW_FW_18_LB	ZRW_SS_19	ZRW_FW_19	ZRW_SS_20_2	ZRW_SS_20_1	ZRW_FW_20	ZRW_SS_21
Product quality and craftsmanship (Q)	Q1										
	Q2	X		X		X		X			X
	Q3										
	Q4										
	Q5										
Product design and innovation (D)	D1										
	D2						X				
	D3										
	D4										
Premium pricing (P)	P1										
Brand history and heritage (H)	H1										
	H2										
	H3										
	H4			X	X		X	X		X	X
Brand identity and personality (I)	I1	X	X	X		X	X	X	X	X	X
	I2					X	X	X		X	
	I3										
	I4										
	I5	X	X	X	X	X	X	X	X	X	X
	I6	X		X	X			X	X		X
	I7	X			X	X	X	X			
	I8		X	X					X	X	X
	I9	X		X		X	X	X		X	X
	I10						X				
Exclusivity and differentiation (E)	E1		X				X		X		
	E2										
	E3										
	E4										
	E5			X	X					X	X
	E6	X		X		X	X	X		X	X
	E7										
	E8										
High visibility and global reputation (V)	V1	X	X	X	X	X	X	X	X	X	X
	V2										
	V3		X	X	X	X	X		X	X	X
	V4	X						X			
	V5	X		X	X	X	X	X	X	X	X
	V6										
	V7										

Appendix I: Coding results (pt. 3)

CATEGORY	CODES	ZRW_FW_21_CG	ZRW_FW_21_ST	ZRW_SS_22_ST	ZRW_FW_22_ST	ZRW_FW_22_KC	ZRW_FW_22_AE2	ZRW_FW_22_AE1	ZRW_SS_23_ST
Product quality and craftsmanship (Q)	Q1								
	Q2	X				X	X	X	X
	Q3								
	Q4								
	Q5	X							
Product design and innovation (D)	D1			X			X		
	D2			X			X	X	
	D3								
	D4								
Premium pricing (P)	P1								
Brand history and heritage (H)	H1								
	H2								
	H3								
	H4	X		X	X	X			
Brand identity and personality (I)	I1	X	X	X	X	X	X		X
	I2	X	X		X	X	X		
	I3								
	I4		X			X			X
	I5	X		X	X		X	X	
	I6	X	X	X		X		X	X
	I7					X	X		X
	I8	X	X	X	X			X	
	I9			X		X			X
	I10			X					
Exclusivity and differentiation (E)	E1	X	X	X			X	X	
	E2	X	X	X	X	X	X	X	X
	E3						X	X	
	E4				X		X		
	E5		X			X			X
	E6	X	X	X	X	X			X
	E7		X	X		X			X
	E8		X						
High visibility and global reputation (V)	V1	X	X	X	X	X	X	X	X
	V2		X			X			X
	V3				X	X			X
	V4	X	X	X			X	X	
	V5		X	X	X		X	X	X
	V6	X							
	V7	X							

Appendix II: Coding results weighted by year

CATEGORY	CODES	ZRW_2013	ZRW_2015	ZRW_2016	ZRW_2017	ZRW_2018	ZRW_2019	ZRW_2020	ZRW_2021	ZRW_2022	ZRW_2023
Product quality and craftsmanship (Q)	Q1										
	Q2	1,00	1,00	0,50	0,33	0,50	0,50	0,33	0,67	0,60	1,00
	Q3										
	Q4										
	Q5								0,33		
Product design and innovation (D)	D1									0,40	
	D2						0,50			0,60	
	D3										
	D4										
Premium pricing (P)	P1										
Brand history and heritage (H)	H1										
	H2										
	H3										
	H4					0,50	0,50	0,67	0,67	0,60	
Brand identity and personality (I)	I1	1,00	0,50	0,75	1,00	0,75	1,00	1,00	1,00	0,80	1,00
	I2	1,00		0,50	0,33		1,00	0,67	0,67	0,60	
	I3										
	I4								0,33	0,20	1,00
	I5	1,00	1,00	1,00	1,00	1,00	1,00	1,00	0,67	0,80	
	I6	1,00	0,50	0,25	1,00	0,75			0,67	1,00	0,60
	I7	1,00			0,33	0,50	1,00		0,33		0,40
	I8		1,00	1,00	0,67	0,50			0,67	1,00	0,60
	I9					0,50		1,00	0,67	0,33	0,40
	I10							0,50	0,00		0,20
Exclusivity and differentiation (E)	E1	1,00	1,00	0,50	0,33	0,25	0,50	0,33	0,67	0,60	
	E2			0,50					0,67	1,00	1,00
	E3									0,40	
	E4									0,40	
	E5				0,67	0,50			0,33	0,67	0,20
	E6			0,25		0,50	1,00		0,67	1,00	0,60
	E7			0,50					0,33	0,40	1,00
	E8			0,25					0,33		
High visibility and global reputation (V)	V1	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00	1,00
	V2								0,33	0,20	1,00
	V3	1,00		0,75	0,33	0,75	1,00	0,67	0,33	0,40	1,00
	V4		1,00	0,25	0,67	0,25			0,33	0,67	0,60
	V5			0,50	0,67	0,75	1,00	1,00	0,67	0,80	1,00
	V6								0,33		
	V7								0,33		

Appendix III: Coding results weighted by year and category.

CATEGORY	ZRW_2013	ZRW_2015	ZRW_2016	ZRW_2017	ZRW_2018	ZRW_2019	ZRW_2020	ZRW_2021	ZRW_2022	ZRW_2023
Product quality and craftsmanship (Q)	0,20	0,20	0,10	0,07	0,10	0,10	0,07	0,20	0,12	0,20
Product design and innovation (D)						0,13			0,25	
Premium pricing (P)										
Brand history and heritage (H)					0,13	0,13	0,17	0,17	0,15	
Brand identity and personality (I)	0,50	0,30	0,35	0,43	0,40	0,55	0,50	0,50	0,46	0,50
Exclusivity and differentiation (E)	0,13	0,13	0,25	0,13	0,16	0,19	0,17	0,46	0,45	0,50
High visibility and global reputation (V)	0,29	0,29	0,36	0,38	0,39	0,43	0,43	0,52	0,43	0,57

ANNEXES.

Annex I: video transcriptions.

ZARA WOMAN STUDIO FALL '21 COLLECTION
ZRW_FW_21_ST
(Different women speaking at the same time) <i>Look at me, hey, look at me. Tell me what you want me to do? This is so boring. No, no, no, no, no, no. Oh non cherie, pas comme ça, mais c'est pas chic ça⁵. No, no, no, maybe yes. No, no, no. Disgusting, this is disgusting. Beauty, beauty comes and goes, beauty comes and goes, beauty comes and goes, but attitude that's forever. Oh my god. Drama, drama, drama. Oh, give me some drama, please. Drama, drama, drama. This is all a mess is a mess, mess. Drama! Hold on, hold one minute. It's about me, it's not about you darling. I love it. You can't be serious, are you? No. What is going on? Who cares? No one cares, no one gives a. And I would like to confirm that I really don't care. You know people will talk so let them talk. Tout simplement genial.</i>

KAIA COLLECTION X ZARA
ZRW_FW_22_KC
(Kaia's own voice) <i>I had a dream last night and in it I was with you, and we were locked together, warm and so pressed up against flesh that I could feel your veins and the blood that poured through them. And we were dissolving, absorbing, and the skin that once held my entire existence it all tore apart flooded into that which once hold you together too. When I woke up, I wanted to tell you about what it's like to become one another, what it's like to exists without a cage around your heart.</i>

ZARA WOMAN SS23 STUDIO COLLECTION
ZRW_SS_23_ST
<i>A lullaby, like a shadow, running across the deep end of a pool. The soft rustle of grass whispering. Shadow dancing. Arms like wings. A slight breeze and a crisp rustle. Our own private world.</i>

⁵ The has been an attempt to maintain the fragments in French of the video included and transcribed in its original language, but there might be some errors due to the author's knowledge of the language.