國立政治大學國際傳播英語碩士學位學程

International Master’s Program in

International Communication Studies

College of Communication

National Chengchi University

碩士論文

Master’s Thesis

Zara 在台灣的消費者行爲研究

Zara Consumer Behaviors in Taiwan

Student: Elena Ng Mak 吳凱麟

Advisor: Professor Ru-Shou Chen 陳儒修教授

中華民國 102 年 6 月

June 2013

Acknowledgment

The present study has come true thanks to the support and kindness of persons, for whom I will be always immensely grateful.

First of all, I would like to thank my advisor, Professor Robert Chen. His guidance and his knowledge about culture studies and fashion have been greatly helpful for my work. I must also highlight his patience throughout all the meetings and emails. I'm also thankful for Professor Katherine Chen, who recommended me in the beginning such a good advisor. As well, I really appreciate Professor Kuo Cheng and Professor Yan Chong Hsien, for offering their time and advice to my thesis. Their comments, opinions and encouraging words made me feel even more eager to conduct this research. I give you a big 'Thank You' to all of you, my dear Professors.

Undoubtedly, without the help of my interviewees, all of this would not have been possible. I'm deeply thankful for you to be willing to participate in my work and to give me such useful and interesting insights and feedback. I have learned a lot with you. Thank you so much, my dear new friends.

Certainly, I felt moved by the effort the Spanish Chamber of Commerce in Taipei did for me to contact Zara representatives in Taiwan. I'm really thankful for such a kind gesture. *Muchas gracias, compañeros*.

Definitely, thank you to my beloved parents and brother, for accompanying me in this four-year Taiwanese adventure, and for giving me moral support whenever it was needed. Thank you for believing in me, my dear family.

As well, thank you to my Taiwanese family 吳任 and great friends in Taiwan, for making me feel like home. Without you, I wouldn't have survived. You have incredibly fulfilled my life with happiness and joy. You have made Taiwan touch my

heart. And I am more than happy to welcome you back in Spain. 非常感謝!

Last but not least, I would like to mention Enrique and his family. Across distance, I have felt your words of encouragement and love. Thank you, my special family.

I am not sure how many times I've written 'thank you' or 'thankful'. But let me take a bow and say it again, this time out loud: THANK YOU!

Abstract

Zara is one of the largest fast fashion retailers in the world. Since its first opening in 1975 in Spain, it has reached the total number of 1,763 stores around the world. Asia is a key expansion market for the Inditex Group (Textile Design Industry), which is the holding company of Zara and seven other chain stores. As a pioneer in fast fashion, Zara absorbs the trends and bring them to the stores in the shortest time possible at affordable prices. Zara arrived in Taiwan in 2011 and since then, the success is significant. The purpose of this study is to explore the perceptions and motivations behind the consumer behavior in Zara among Taiwanese consumers. In order to understand the fashion and social phenomenon, we examine the theories and concepts related to fashion, as well as the background of Zara in its home market and its impact worldwide, especially in Taiwan. Apart from the literature review, we will conduct interviews with Taiwanese customers of Zara and store assistants in Taiwan. As well, we will include observations from Zara in Spain. Unlike previous case studies of Zara, which have a business focus, we address the present study from a cultural perspective.

Keywords: Zara, Inditex, Taiwan, fast fashion, consumer behavior

中文摘要

Zara是世界上最大的快速時尚零售商之一。從1975年第一家Zara開設於西班牙，至今Zara在世界上總共有1,763家分店。亞洲對Inditex來講是一個重要的擴展市場。Inditex集團(紡織品設計企業)是時裝控股公司, 旗下擁有Zara和其他七個品牌。身為一個快速時尚開拓者, Zara以最快的速度及合理的價格來體現最新潮流時尚。Zara在2011年進駐台灣，從此這品牌非常成功。本研究是從文化的觀點分析探討台灣的Zara消費者行為。為了瞭解這個時尚與社會現象，我們檢驗關於時尚的理論與概念，以及Zara在國內市場和全世界產生的影響。除了文獻探討之外，我們也採訪在台灣的Zara消費者和店員，並在西班牙Zara進行實地研究調查。

關鍵字：Zara、快速時尚、消費者行為、時尚學

Table of Contents

Table of Figures

Chapter 1. Introduction

1.1 Motivation

To be more specific, two events motivated me to work on this thesis.

The first one comes from a conversation. Zara opened its first store in Taiwan, exactly on the first floor of the world's second highest building of Taipei 101, on the 5th of November in 2011. That day I called my mother that she had no need to send me more packages with Zara clothes. Sadly she told me that the Zara store in our town just shut down. I was shocked: Zara, one of the world's largest clothing and accessories retailers, is closing down stores in the country where it was born. Industria de Diseño Textil, S.A. (Textile Design Industry) more commonly known as Inditex group, is one of the largest fashion distribution groups worldwide and Zara is its flagship chain store. In the financial year of 2012, Inditex's net sales rose by 16% from 2011, to 15.9 billion euros (Inditex.com) thanks to the expansions in America and Asia, (being this latter market where Inditex has grown most), in contrast to a Europe with little movement and, a Spain suffering the worst economic recession in its history, with drastic cuts in public funds and consumption at its lowest points. In contrast, Zara's success in further regions such as America and Asia is increasing: In Asia alone, Zara opened 11 new stores during the first months of 2013 (latest update 30th April), reaching a total of 326 stores nowadays.

The second event dates back to my first year in Taiwan, in 2009. On a group night out in Taipei, I wore a non-real leather purple jacket I bought during the summer sales back in Spain, an item I was long time yearning for and which I decided only to wear for special occasions. That night my jacket was stolen, in one of the safest countries in the world. That was the first time I realized how treasured Zara items could be. Unconsciously, I viewed myself having my first temper tantrums regarding to a fashion item: “it was not just simply a jacket; it was from Zara, my Zara jacket!”

On the one hand, the first event made me look deeply at the success Zara is achieving within the Taiwanese market and more precisely, within its society. “Zara must be spread all over the world far and wide. We first have to open in the most important cities to be known, so people (and future customers) see and buy our clothes. Then, we continue opening where it’s nearest to urban areas, to establish our presence”, said Amancio Ortega, co-founder of Inditex group and the leading figure behind Zara. Inditex is present in 86 markets across five continents, with a total of 6,058 stores, from which 1,763 are Zara. Currently there are 5 Zara stores in Taiwan. Since its arrival in 2011, the brand has become very popular among Taiwanese consumers. It is interesting to explore their consumption motivations, whether it is due to merely the clothing quality and/or affordable prices, or there are other motivations that go beyond.

On the other hand, the second event made me reflect on the influence that fashion clothing and brands can have in people’s behavior and to a further extent, the identity itself. As Umberto Eco wrote in 1973, “I speak through my clothes.” In our daily life we attend a “society of the spectacle”, where our selves consist essentially in the image reflected in the eyes of others. Consciously or not, we create an identity of ourselves through clothing and, through what we believe a specific clothing means within a particular society (included the correspondent brand and fashion style). Thus, we want to analyze whether Taiwanese also speak about themselves by purchasing or wearing any Zara item, and which consequently influences in their consumption behavior in Zara.

In regard to our research, this thesis will focus on the consumption behavior of Taiwanese consumers in Zara stores in Taiwan, from a cultural perspective.

1.2 Purpose

The present thesis aims to examine the phenomenon surrounding Zara among Taiwanese consumers. According to Monneyron (2005), “fashion, as a concept and as a recent social phenomenon, is created in Western societies” (p.15). Nevertheless, nowadays, and in any kind of society, when does fashion really become a social phenomenon? Therefore, we want to observe whether we are witnessing a fashion and social phenomenon of Zara in Taiwan.

And, why should we choose Zara over other fashion brands existing in Taiwan? Before Zara entered the Taiwanese market in 2011, the Spanish presence was, and still is, represented by 10 companies established in Taiwan (ICEX, 2011). Among them, only one belongs to the fashion sector, Flagship Fashion Trading Co LTD, which is responsible for importing clothes and accessories of Mango in the Taiwanese market. This fashion brand established itself in the Asian market with its entry into Taiwan in 1995. Currently, there are in Taiwan a total of 25 Mango stores. Opening their first store in 1984 in Barcelona and now with over 2,000 stores in 140 countries, Mango is since 1998, the second largest exporter in the Spanish textile sector - right behind Inditex group, with Zara as its flagship chain store. Nevertheless, although the path in Taiwan for Mango is long, the overall feeling about Zara among Taiwanese consumers has made an unprecedented effect, only comparable with Japan’s Uniqlo, the fourth largest specialty apparel retailer worldwide (Uniqlo.com). The two giant clothing retailers are competing in Asia, the unquestionably hottest retail market in the world, and Taiwan, indeed, plays an important piece of their global expansion strategy. Both share similar target demographics and store expansion ambitions but each has its own business model, and both equally successful. At the moment, Zara has opened in Taiwan five stores (since 2011), compared to the 27 stores of Uniqlo (since 2010). Meanwhile, Uniqlo has many more stores (1,120) in Asia than Zara (326). On the other hand, the Spanish brand has more presence in the rest of the world with 1,610 stores, while Uniqlo has 'only' 17 stores (Fastretailing.com). Therefore our thesis has decided to study the case of Zara in Taiwan as no other Spanish fashion reference has ever made such an impact in this country before, in a society that usually takes fashion influences from its Asian neighbors, mostly from Korea and Japan.

Taiwanese clothing styles are influenced by media culture, such as movies, television, popular music, and especially, fashion and cultural magazines which cover all latest fashion trends (both local and foreign) or social events where the stars wear the newest designs. Although Taiwanese clothing styles are inspired by Western and Eastern flavors, consumers add a touch of Taiwanese unique style, which is a fusion of local customs and culture. Fashion in Taiwan sticks to the traditions but it always keeps an eye on the newest trends of the global fashion panorama. However, the phenomenon of Zara in Taiwan looks impressive, if we take into account the following two facts: one, that the Taiwanese market is experiencing a new wave of foreign brands, while coexisting with local brands, and two, that Taiwan consequently lives in a highly competitive environment of fashion brands and retailers. So, how does Zara attract customers in Taiwan and to the rest of the world? First of all, there is no advertising: "we don't want to create a perception or press the customers with a specific collection or clothes," says Jesús Echevarría, director of communication of Inditex (Martínez, 2012, p. 73). As Martínez (2012) writes, Amancio Ortega, the man behind the success of Zara, considers that "the best advertising is being in the best street" (p. 149).

Apart from the element ‘store’, Zara’s success is mainly due to the importance given to the rapid turnover of collections: Zara introduces new models twice a week, which makes customers visit the store frequently in search of more and more fashionable items, in a way to keep them updated, or to put in other words, in a way to create expectations on them, as items are produced in limited edition. Therefore we agree with Martínez (2012) when he points out that for the Inditex Group, the most important factor to consider is time (p. 131).

These recipes have, so far, worked in Taiwan and Zara keeps on expanding its global fashion throughout the country. Therefore, it is very interesting to analyze such fashion and social phenomenon in Taiwan, a country that keeps up with the latest international trends while maintaining its local style.

Previous studies about Zara conducted in Taiwan have been focused on the business models of Zara and its comparison, on the one hand, with luxury brands such as Armani or LVMH, and on the other hand, with retailer Uniqlo. However, our study will analyze Zara as a global brand from a cross-cultural perspective, by understanding Zara in its home market Spain, before focusing on the consumer behavior of Zara within the Taiwanese market.

1.3 Research Question

In Taiwan, the main competitor of Zara is Uniqlo. The increase of international fashion brands has put great pressure on Taiwanese clothing companies, says Alexander Wu, head designer for men’s wear at Shiatzy International Co. Ltd., the Taiwan-based company behind the famous Shiatzy Chen label. He states, “International brands have an appeal in Taiwan. The fierce competiveness of those brands comes from their ability to launch medium-priced products at a high frequency” (Taiwan Today, 2012). In Taiwan, Zara and

Uniqlo also compete with NET (founded in Taiwan in 1991), Giordano (established in Hong Kong in 1981), Baleno (established in Hong Kong in 1996) and, Hang Ten (originally a sportswear brand created in California in 1960 and currently owned by Hang Ten Enterprises Ltd, located in Hong Kong).

Although it is not long since Zara has landed in Taiwan, Zara has already made an impact in the fashion consumption behavior within the Taiwanese market. But, why and how has it happened? This thesis explores first, what are the Taiwanese consumers' perceptions towards the brand, from the perspectives of its clothing and store visiting experience. It's also important to point out whether the customers knew about the brand before its entry in Taiwan. Second, we analyze the underlying social and psychological motivations that influence the fashion consumption behavior among Taiwanese in the Zara stores in Taiwan. And third, we study their awareness of gaining something more than just a piece of Zara by performing such consumption activities.

This thesis will go through these questions, in order to find responses for the phenomenon surrounding Zara among the Taiwanese consumers.

1.4 Method

The content of the introductory chapter is collected from various sources concerning to the background and profile of Zara, such as its official website, the results published on March 13, 2013, the Inditex 2011 Annual Report and Martínez's *Zara: Visión y estrategia de Amancio Ortega* (Zara: vision and strategy of Amancio Ortega), which talks about the success of the brand, and to an extent, of the whole Inditex Group, as well as the personal history of the co-founder Amancio Ortega. For Zara's competitors' information, we use their official websites. Chapter 2 covers the literature review regarding to the production and consumption of fashion. The content for this chapter is collected through references about fashion theories and concepts, sociological discourses, as well as fashion history, in three languages (Spanish, English and Chinese). Chapter 2 lays the path for Chapter 3, which entirely focuses on Zara. Our sources in Chapter 3 are similar to those in Chapter 1. In Chapter 3 we also include a brief comparison between two issues of the Taiwanese magazine 遠見 Global Views Monthly.

As for the second half of the thesis, which concerns the consumption behavior among Taiwanese consumers in Zara stores in Taiwan, we choose descriptive qualitative research method. We propose open-ended interviews with both customers and staff (store managers and store assistants) of the Zara stores in Taiwan. We also include a field trip with a fashion consumer.

Therefore, in order to address the research questions proposed above, these are the methods chosen for the data collection.

1.5 Thesis structure

The present thesis is intended to offer an introduction to the fashion consumption behavior in Taiwan among Taiwanese consumers, specifically in the case of the fashion retailer Zara, in its stores located in Taiwan. Chapter 1 is an introductory chapter explaining the motivation, the purpose, the research questions, the method proposed and the thesis structure. Chapter 2 has five sections. We review the interpretations of the concept of fashion proposed by several authors, as well as the analysis of sociological discourses. We continue analyzing fashion as a social phenomenon, the symbolic consumption in fashion and the concept of anxiety. Finally, we go briefly through the history of Haute couture, Prêt-à-porter and retailing, as well as the concepts of mass fashion and fast fashion. Chapter 3 covers the world of Zara by introducing background, current profile and business strategy of Zara and to an extent, Inditex. Then we have a look at its worldwide success, with special focus on the situation in Asia and in Taiwan. Chapter 4 brings the results from open-ended interviews with both customers and staff of the Zara stores in Taiwan, as well as the results from the field trip with a fashion consumer. In this chapter we will also analyze those results. Chapter 5 is the conclusion of the thesis, including discussion, limitations of study and further research.

All in all, with this thesis structure we want to understand the fashion and social phenomenon around Zara in Taiwan by analyzing the consumption behavior among Taiwanese consumers in the Zara stores in Taiwan, from a cultural perspective.

Chapter 2. Literature Review

This second chapter will cover the theoretical frameworks that will help us to understand the background of the present study. The present chapter focuses on the production and consumption of fashion, and it will be divided into five sections.

We first review the interpretations of the concept of fashion proposed by several authors. After that, we move into the analysis of sociological discourses by reading Veblen, Spencer, Simmel, and Blumer, among others. We continue by exploring fashion in culture as a social phenomenon, as well as the relation of fashion with symbolic consumption and anxiety. Then, we go briefly through the history of fashion in relation to Haute couture, Prêt-à-porter and retailing. Finally, we look at the concepts of mass fashion and fast fashion, which are particularly closely related to Zara's principles. Chapter 2 lays the path for the following chapter 3, which entirely regards to the fast fashion empire of Zara, and to a further extent, to the Inditex Group.

For the present chapter we have consulted the following books as main sources: *Fashion-ology*, by Kawamura, Y. (2005); *El vestido habla* ("The dress speaks"), by Squicciarino, N. (2012); *50 respuestas sobre la moda* ("50 answers about fashion"), by Monneyron, F. (2006); and *Fashion theory: a reader*, by Barnard, M. (2007).

2.1 Interpretations of fashion

Kawamura (2005, p. 10) cites Wilson to point out the complexity of explaining fashion: "Sometimes fashion is explained in terms of an often over-simplified social history; sometimes it is explained in psychological terms; sometimes in terms of the economy." Unfortunately, fashion has always encountered difficulties to be taken seriously in the academic field, "because fashion is considered trivial, frivolous and fun" (Kawamura, 2005, p. 79). Nevertheless, various authors have studied fashion as a subject and given their own interpretation of the concept of fashion. In Squicciarino's book (2012, p. 149) we learn that for Kybalová, fashion reflects the general lifestyle of the society; each particular human being is subject to it in a spontaneous way and with enthusiasm or in a passive way and unconsciously. Fashion is a cultural component of everyday life; it is its illustration in live colors. Similarly, Kawamura (2005, p. 74) quote Horn and Gurel, who explain:

> Fashions in any area of life, especially fashions in clothing, are not random and purposeless. They reflect the cultural patterns of the times. Fashions follow a progressive and irreversible path from inception through acceptance to culmination and eventual decline, and they also tend to parallel to some extent the larger events of history.

Crane in her *Fashion and its social agendas* (2000) and Kawamura (2005) apply Bourdieu's cultural stratification theory to observe the influence of different social classes and its tastes in the concept of fashion. This theory aims to understand how different social classes respond to cultural goods and material culture in highly stratified societies. Kawamura (2005, p. 36) illustrates this with the following example: the designers' position within a certain society, with their cultural tastes and social status, determine the status of products they produce and influence, at the same time, in their audience (p. 96). Crane (2000, p. 8) writes, that, according to Bourdieu, the tastes of working-class men would be based on a "culture of necessity" characteristic of that class, in other words, clothing that was practical, functional, and durable rather than aesthetically pleasing and stylish (for the bourgeoisie). Similarly, according to Bell, quoted by Kawamura (2005, p. 79): "fashion is the grand motor force of taste, and the influence of fashion goes beyond individual taste and our past perceptions of fashion; it molds our concept of what is beautiful" (p. 79). However, the people's taste in clothing is only considered fashionable when it is constructed by institutional factors.

Squicciarino (2012) explains that during the 17^{th} century, upper classes in France dressed "à la mode", i.e. according to the French taste, in order to differentiate themselves from the austere dress of the dominant Spanish court (p.151). The word 'mode' has been used to refer the constant changes in clothing. Continuing with the perspective of innovation, Squicciarino (2006, p. 156) borrows Squillace's definition of fashion: fashion is "a social phenomenon of psycho-collective origin and of aesthetic character, that satisfies the need of innovate and change, as well as the desire to look, to shine, to compete and to win."

Other authors have seen fashion as a way to express oneself. For instance, Kawamura (2005, p. 28) quotes Cannon:

> Fashion is an inherent part of human social interaction and not the creation of an elite group of designers, producers or marketers. Because of its basis in individual social comparison, fashion cannot be controlled without undermining its ultimate purpose, which is the expression of individual identity. If self-identity were never in doubt and social comparison never took place, there would be no demand for fashion, and there would be no need or opportunity for style change.

2.2 Sociological discourse

First, we will analyze the concept of imitation in fashion. Kawamura (2005, p. 20) quotes

Hunt: "imitation is typically a view from above since it assumes that social inferiors envy superiors and engage in imitative activities to emulate their 'betters' in order to gain recognition and even entry into the privileged group." Similarly, Squicciarino (2012, p. 153-154) uses Spencer's observation: fashion is intrinsically imitative, as fashion attempts to produce the similarities and the equalization of the inferiors with the superiors through a competitive imitation. It is about rivalry, rather than admiration from inferiors. In Spencer's theory, upper classes try to differentiate themselves from the lower classes, while these, at the same time, by imitating the upper classes in clothing, try to satisfy their desire to belong to an upper class, and to differentiate themselves from the lower classes. Quoted by Crane (2000, p.6), Simmel adds that the highest-status groups sought once again to differentiate themselves from their inferiors by adopting new fashions. And this, in turn, starts the cycle all over again. Simmel's scheme elevates the prestige of the elite to the position of major importance in the fashion process. Kawamura (2005, p. 20, 22) continues with Spencer's observations when he implies that what is important is not the actual clothes that are worn, but the wearer's position in society, which has the power to transform clothing into fashion. In addition, Spencer considers two types of imitations: competitive and reverential. The former is prompted by the desire to assert equality with a person. And, the latter is prompted by reverence for the one imitated. For instance, any modification of dress adopted by a king is imitated by courtiers and spreads downwards; the result of this process is 'fashion' in clothing. This is exactly a fundamental principle of the trickle-down theory, which was studied by Spencer in 1896, Veblen in 1899 and Simmel in 1904. As the name implies, fashion is launched at the top of the social structure and eventually works its way down to bottom, i.e. fashion is diffused vertically. In Squicciarino's book (2006) Simmel positions the roots of fashion in two tendencies the human being adopts: the tendency for imitation or social equality and the tendency of individual differentiation or change (p. 154). Thus, this creates the following paradox: does fashion encourage a democratized equality or a differentiated exclusion? In other words, whether fashion aggregates individuals of a social class from others, or fashion poses a threat to the upper class, while offering at the same time an opportunity to lower classes to cross that class boundary.

According to Squicciarino (2006, p. 155) Veblen in his *The Theory of Leisure Class* defends the trickle-down theory, as fashion and consumerism phenomena depend on the social structure and not on natural needs. He argues that in its origins, fashion served to express one's wealth and to demonstrate consumption without any physical effort. In Kawamura's study (2005, p. 97) we find that within Veblen's analytical framework regarding to the institutionalization of the leisure class through consumption activities, he identifies three concepts: Conspicuous consumption, conspicuous waste and conspicuous leisure. The first aims to impress others and demonstrate one's purchasing power. The second demonstrate one's wealth by giving away one's possessions. And, the third shows a life devoted for leisure, without any labor or effort, thus it displays one's social status. Veblen's discussion emphasizes the fact that people acquire goods to compete with others. We copy those of higher status with whom we are competing. Thus, as Kawamura (2005) concludes in Veblen's analysis, being fashionable has to be something that is envied and desired; otherwise, the consumer would not adopt fashion nor wish to be fashionable (p. 97).

Martínez Barreiro (2006, p. 188) limits the validity of the trickle-down conception solely for pre-consumerist societies, such as those studied by Veblen. But it can also be valid for consumerist societies, as those studied by Bourdieu, as the trickle-down theory depends on the class structure of a capitalist society. However, a society, in which a developed capitalist system favored by the mass production, the mass communication and the social mobility, has gradually removed the strict class distinctions. Squicciarino (2012, p. 165) argues that new fashions appear and stay within the middle-class, who constitutes the main subjects in this contemporary period. Therefore, democratization and social change have allowed fashions to be spread both to the top and to the bottom within a less obvious social hierarchy. Regarding to our contemporary society, fashion is no longer only a trickle-down process, "but also a 'trickle-across' process," argues Veblen, quoted by Kawamura (2005, p. 58). Such 'trickle-across' process claims that fashion moves horizontally between groups on similar social levels. Spencer also suggested a similar view when he explained fashion is intrinsically imitative. In addition, fashion can even be a 'trickle-up' or 'bubble-up' process, and Kawamura (2005, p. 31) uses Blumer's proposition when he situates consumers in the construction of fashion. Fashion is initiated and adopted from the bottom and it eventually moves to upper classes. According to Kawamura (2005), as consumers become increasingly fashionable and fashion conscious in modern and postmodern societies, they themselves become producers. For instance, street fashion began as anti-fashion, but ironically it was acknowledged as fashion (p. 101).

On the other hand, Squicciarino (2006, p. 166, 167) adds a fourth model, which he defines as model of the *marionette* or trickle-effect. This concept can be present in consumerist societies: although there is a general improvement in life quality, it would still exist an invisible stratified pyramid among social classes. This can be influenced by the increasing "bombing" of advertisement to encourage consumption.

Contemporary sociologists have reviewed these earlier works on fashion and most of them reject the class-differentiation. For instance, Kawamura (2005, p. 30-31) uses Blumer's perspective, as he replaces the trickle-down theory with the collective selection theory. He argues that the class differentiation model is rather suitable for European fashions in the 17^{th}-19^{th} centuries, but no longer applicable to fashion in contemporary society. For Blumer, "the fashion mechanism appears not in response to a need of class differentiation and class emulation, but in response to a wish to be in fashion, to be abreast of what has good standing, to express new tastes, which are emerging in a changing world". Thus, fashion is led by the taste of the contemporary collective mass, rather than by the prestige of the elite.

After we have reviewed the theoretical frameworks around fashion, with a special focus on the concept of imitation within stratified societies resulting in various theories (the trickle-down, the trickle-across, the trickle-up and the trickle-effect), we have also observed that fashion is not always influenced by socioeconomic factors, but by the tastes and preferences of the individuals themselves. As we can see, by giving a social perspective to fashion, we can better understand the significance of fashion in the society today.

2.3 Fashion as a social phenomenon

As Monneyron (2005, p. 15) affirms, we may think that fashion is a universal phenomenon when we look back at prestigious old civilizations, such as the Indian or the Chinese, where ornaments were viewed as an old form of fashion. In Kawamura's study (2005) we learn from Lipovetsky that clothes are almost universal, fashion is not. Fashion does not belong to all ages or to all civilizations; it has an identifiable starting point in history (p. 26). While Flügel indicates that fashion is linked to a particular society and culture, those of the West (p. 26). However, Cannon strongly disagrees with the perspective that fashion is a Western phenomenon and argues: “Although the processes of fashion comparison, emulation and differentiation are more noticeably apparent in the rapid changes that characterize systems of industrial production, the same processes are observable or at least inferable in most cultures” (p. 27). Therefore, Kawamura (2005) concludes that fashion is found not only in modern societies but exists in all known societies (p. 27).

Kawamura (2005, p. 24) explains that in medieval and early modern Europe, sumptuary laws prohibited people in the subordinate ranks from living or dressing like those above them. However, as industrialism led to a less hierarchical society, people could eventually compete in style of living with those upper classes, and they were entirely free to wear whichever kind of clothing. However, Monneyron (2006, p. 17-18) offers a curious and contradictory example: during the French Revolution in the 18th century, which promoted liberty and equality, a fashion reserved for a restricted and reduced group of aristocrats was born. Again, the freedom of the individual was being questioned. Nonetheless, without the upper class, fashion would not be possible be fashion as we know today. And here it’s when Haute Couture appeared for the first time.

Monneyron (2006, p. 17) says that if we look back in the 19th century, when fashion was born as a social phenomenon, with rituals and foundation of institutions, we see that the society’s most privileged value lied on the individual – individualistic society. Thus, it’s not a coincidence that the phenomenon of fashion is developed first in England and France, countries in which such kind of society was first established.

On the other hand, Kawamura (2005) remarks that social mobility is a fundamental factor for fashion phenomena to occur (p. 24). Indeed, it was the objective of reducing class distinctions emerging from each individual and favored by the political and economic development, that the origins of fashion lie in the origins of modernity with the growth of industrial capitalism. In regard to the class boundaries that in the industrial societies started to become blurry, therefore, the individuals of these societies have more opportunities, a fact that allowed the emergence of fashion as a phenomenon in many societies. Kawamura (2005, p. 26) concludes by quoting Baudrillard, who considers that fashion can only exists in socially mobile societies: “Modernity is a code and fashion is its emblem”.

However, nowadays, the way we see fashion, as social phenomenon within a particular society does no longer look at the social hierarchy, but at the ways that society itself creates fashion; through art, media, social media, lifestyles, travels, among others. In other words, all the elements that form part of each social group’s interests and daily life can influence in fashion. From fashion designers and famous people in the popular culture to fashion consumers, all of them are participants within this social phenomenon called fashion; to some extent they can determine the directions of fashion change. This perspective will help us to analyze the social phenomenon of Zara in Taiwan among Taiwanese consumers.

2.3.1 Fashion and symbolic consumption

To understand the concept of symbolic consumption, Sowden & Grimmer (2009, p. 1) review the definitions of this concept, proposed by several authors. Piacentini and Mailer refer to processes of ‘symbolic consumption’, whereby individuals use products as mechanisms to create, develop and maintain their identities. Dittmar describes a ‘symbolic-communicational’ link through which the symbolic meanings of material possessions communicate aspects of their owner’s identity to themselves and to others. Ger and Belk similarly note that consumption is a communicative act crucial to the constitution of self.

O'Shaughnessy & O'Shaughnessy state that consumers seek "positional" goods to demonstrate group membership, to identify themselves and mark their position – as well as social status-. Thus, the symbolic meanings of material possessions serve to express not only one's own identity and membership of social groups, but also to perceive the identity of others, according to Belk, Dittmar, Solomon, Christopher and Schlenker. Lury states that possessions are "a means of making visible and stable the basic categories by which we classify people in society". McCraken and Wattanasuwan consider that material objects embody a system of meanings, which, upon consumption, can be used by individuals as an outward expression of their identity, and as a means of signifying group membership and identification. Douglas further argues that consumers define themselves in contrast to others, that is, they identify themselves in terms of what they are not. Thus, individuals use consumption to give themselves a sense of belonging as well as an affinity with others who make similar statements to, and about, themselves.

Lane (2000, p. 76) in his *Jean Baudrillard* reviews what the French author stated about use-value and exchange-value. The first concept arises from productive activity to construct something that fulfills a need, such as clothing. The use-value functions as the instrumental value of an object. While the second one is not related to the commodity itself but to the cost of the labor needed to make the commodity. The exchange-value functions as the economic value. Baudrillard even argues that we must distinguish between the logic of consumption and the logic of use value, exchange-value and symbolic exchange. As an example, he suggests the difference between a wedding ring and an ordinary ring. The wedding ring has symbolic value (the marriage), and in the process of being given becomes a singular object. The ring isn't periodically changed for one of a different fashion, and so on. While the ordinary ring, is however, not usually symbolic: it can be changed for one of a different fashion, thrown completely away, be worn to show one's wealth or be worn purely for personal pleasure. The ordinary ring is non-singular and functions like a sign; it is an object of consumption. Therefore, we can verify later the symbolic value to Zara items from our interviewees' comments.

On the other hand, Martínez Barreiro (2006, p. 195) explains that the growth of consumerism and the diversity of tastes and preferences within the society have changed the way fashion is produced, distributed, commercialized and sold. Therefore, in the process of fashion nowadays, material goods create meanings –or even values. What is now consumed is the image concerning to that specific item and not the material goods itself. In addition, we believe that marketing and advertising play a significant role in the process of fashion and its symbolic consumption.

After we have reviewed the literature regarding to symbolic consumption, we can observe that the symbolic value of material possessions is realized when individuals engage in consumption of a specific item and thereby express their social identity. We will observe in further chapters the degree of influence of the symbolic consumption among Taiwanese consumers when they visit Zara stores in Taiwan.

2.3.2 Fashion and anxiety

We find two meanings of anxiety in *Oxford Dictionaries*: 1. A feeling of worry, nervousness, or unease about something with an uncertain outcome; and 2. strong desire or concern to do something or for something to happen.

In order to apply anxiety in fashion, we first look at the correlation between newness and fashion. Fashion as a concept and as a phenomenon has gone through various changes along the centuries. Indeed, Kawamura (2005) considers change and novelty are two of the characteristics that fashion has always encompassed, no matter which time period fashion refers (p.6). Both characteristics are highly valued in fashion, probably because they are socially constructed or imposed by institutions (by the fashion system or by fashion designers). Kawamura (2005, p. 6) cites Koenig, who refers to ardent fashion followers as *neophilia*. He states that humankind receptiveness for anything new is, among many other aspects, in some way essential to fashion-oriented behavior. Like Koenig, Kawamura (2005, p. 6) borrows Barthes's view about newness in fashion:

> Fashion doubtless belongs to all the phenomena of neomania, which probably appeared in our civilization with the birth of capitalism: in an entirely institutional manner, the new is a purchased value. But in our society, what is new in Fashion seems to have a well-defined anthropological function, one that derives from its ambiguity: simultaneously unpredictable and systematic, regular and unknown.

The newness component that fashion conveys, can make consumers feel anxious in their fashion consumption behavior; when they visit a clothing store to look for any new items, they may feel "disoriented" if they have missed any previous item and they find themselves without forms of support and reassurance. As Koenig named (quoted by Kawamura, 2005, p. 6), the ardent fashion followers can experience anxiety and desire when they are eager to own a certain unattainable, authentic or unique fashion item, in order to express themselves, i.e. to offer a particular image. Not only this, but a sense of belonging to a particular social group can make those ardent fashion followers (or consumers) feel anxious if they cannot get that specific item or brand.

Arnold (2001, p. 12) in her *Fashion, Desire and Anxiety* explores the fashion's relationship with consumerism and the construction of identities, that if aimed to an extreme, that relationship can lead to self-destruction. She illustrates the dichotomy in fashion by citing Simmel: "fashion on the one hand signifies union with those in the same class, the uniformity of a circle characterized by it, and, at the same time, the exclusion of all other groups." Arnold continues by explaining that dress can be used as an indicator of group identity, including all those who adhere to particular tenets of taste and style, but this necessarily excludes anyone who does not adopt the group's dress codes.

We can apply the concept of anxiety in our case of Zara. Products in Zara stores are limited edition, and it makes a win-win situation: On the one hand, it catches customers on going back often to the store, as it creates expectations with the introduction of new models twice a week. On the other hand, products can thus be sold at a full price, without having them to be returned; hence, there are almost non-existent stocks.

2.4 Haute couture and Prêt-à-porter

Monneyron (2006, p. 21) traces back to the beginnings of haute couture (literally "high dressmaking", and commonly known as "high fashion"). According to Monneyron (2006, p. 22), two factors led to the appearance of haute Couture: 1. An emergent middle-class, and 2. Clothing was no longer subject to political strings and public life, which laid the path for aristocracy, in order to differentiate themselves. The history of fashion considers the English Charles Frederick Worth as the Father of haute Couture. Barnard (2007, p. 78) quotes Lipovetsky in *Fashion theory: a reader*. Lipovetsky pointed out that Worth revolutionized the process of creating fashion, especially in sales techniques and advertising. His major innovation was introducing the clothing models to be worn by young women, who became the prototypes of today's mannequins or fashion models, known then as *sosies*, "doubles". In this way, fashion became an enterprise involving not only creativity but also advertising spectacles. However, haute couture as we know today did not adopt the current rhythm of creation and presentation until the beginning of the 20th century: Haute couture is based in the exclusive design, (i.e. no mass production) aimed to exclusive customers with a good economic background. As Monneyron (2006, p. 30) says, until the end of the 1950s, haute couture was copied by dressmakers.

As Monneyron (2006, p. 30-31) explains, although prêt-à-porter is a term invented by a French in 1949, the concept, renamed under "ready wear", was actually applied to the mass fashion production in the US right after the World War II was over. Prêt-à-porter also reproduces models of haute couture, but with obvious differences. Prêt-à-porter uses different fabrics and of inferior quality, clothes are not tailor-made and they generally do not have a single size. Its variety reflects the heterogeneity of tastes and the economic access of consumers.

Barnard (2007, p. 362) takes Braham's perspectives. Braham considers that haute couture has lost is significance in contemporary fashion, as the major fashion houses have erased the apparent division between elite designer fashion and high street fashion. Therefore, fashion houses have increasingly applied for licensing agreements worldwide, in order to protect their brands and image. However, in parallel, haute couture deals nowadays with a counterfeiting market of elite designers' items with their correspondent name and logo. The limited edition of original and exclusive products with a high fashion brand can make customers or followers feel anxious.

As we can see, haute couture and prêt-à-porter are two completely different clothing from social, economic and cultural perspectives. And nowadays the fashion on the streets and peoples' lifestyles is replacing haute couture and influencing in the decisions makings of clothing companies. We will link in chapter 3 the connection of these two modalities of clothing with the fast fashion retailer Zara.

2.4.1 Retailing and Global fashion

Cachon and Swinney (2011, p. 793) state that enhanced design and quick response (QR) are two essential factors for clothing retailers nowadays. Similarly, Nueno and Ghemawat (2003) use the description of QR from Hammond and Kelley: larger apparel retailers play the leading role in promoting QR. QR is a set of policies and practices targeted at improving coordination between retailing and manufacturing in order to increase the speed and flexibility of responses to market shifts, which began to diffuse in apparel and textiles in the second half of the 1980s.

Cachon and Swinney (2011, p. 793) add that European fast fashion retailers such as Zara, H&M, and Benetton, employ large staffs of internal designers and even use costly local labor and expedited shipping methods when necessary. Although this is seemingly costly, it still turns profitable, because they can minimize strategic behavior. For instance, according to the 2011 Annual Report of Inditex Group (holding company who owns Zara and seven other chain stores), over 50% of Inditex's manufacturing takes place in suppliers from proximity. Thus, fashion retailers stress on the importance of the close relationship between manufacturing and retailing.

On the other hand, fashion retailers focus on internationalization, which creates a highly competitive environment. Current major fashion retailers promote a global fashion: Zara, H&M and Uniqlo. The three have different business models but equally successful. The emergence and development of global fashion in the 21st century has played a significant role in the fashion industry. Fashion is, actively and passively, part of the cultural globalization, and globalization is about mobility across frontiers of individuals; goods, values, customs, traditions, etc. Fashion is global in the sense that Western fashion system no longer defines what is fashionable and what is not.

As we will see in chapter 3, the maxim of Zara is to create and commercialize a global fashion, at affordable prices. With its current 1,925 stores in the world, the concept of global fashion that Zara embraces since its beginnings proves that national borders do not impede to a shared fashion culture (Martínez, 2012, p. 99).

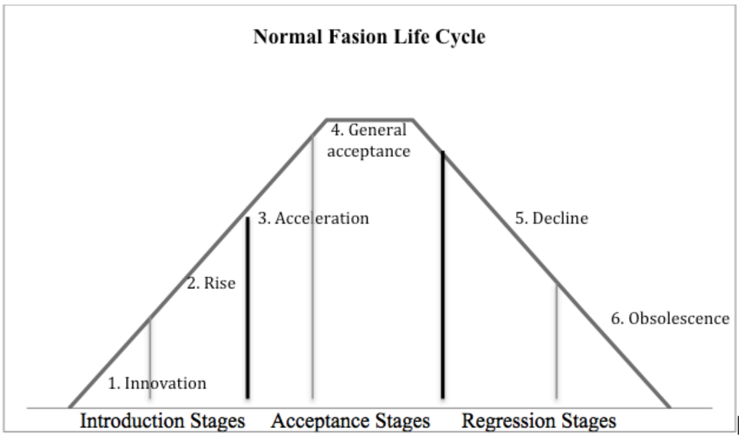
2.5 Mass fashion and fast fashion

According to the Glossary of Glencoe/McGraw-Hill, *mass fashion* consists of "widely accepted fashions sold in mass quantities through retail stores, often at low prices". Barnard (2007, p. 223) cites Partington: the so-called 'mass-market' theory (or similarly, what we mentioned in the previous subsections, 'trickle-across') was developed during the post-Second World War, along with a capitalist system and industrialized society, in which the working classes needed commodities. With mass production, consumer revolution came along and led to new tastes, new preferences and a change in consumption behavior among the working classes. Fashion was then democratized. Thus, mass-market fashion or mass fashion appeared due to economic arguments. Furthermore, the seasonal component of fashion was re-considered: new manufacturing and merchandising strategies were introduced, so that consumers within all socio-economic groups could access to clothing simultaneously to the collections presented in fashion shows. Thus, market segments with their respective different styles were able to access equally fashionable styles and a wide range of choices. And nowadays, many of the new ideas for mass fashion come from the street, the trends, and under the pressure of constant innovation.

In addition, Kawamura (2005) correlates mass fashion with labels: Before something can really become a fashion, it must be capable of being labeled. If the new style or clothing becomes a mass fashion, the label will become known to many people, spread quickly over a wide territory, and become identified with that particular time (p.87). Therefore, the flow of information and influence is an important factor within this system of mass fashion. As Partington (quoted by Barnard, 2007, p. 223) states, the mass fashion responded to a desire of the large majority of consumers to innovate and to be fashionable in their styles of life.

In recent years, the rise of fashion retailers has attracted consumers worldwide. What do Zara, H&M and Uniqlo have in common? *Fast fashion*. According to Macmillan Dictionary (2010), fast fashion is a term used to describe cheap and affordable clothes, which are the result of catwalk designs moving into stores in the fastest possible way in order to respond to the latest trends. Before analyzing fast fashion, we have a look at the fashion life cycle.

Figure 1. A normal fashion cycle model.

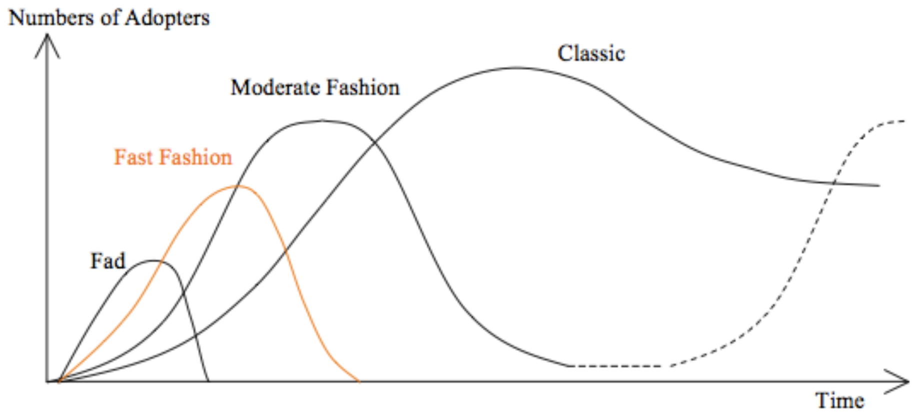


Source: *Consumer behavior in fashion,* Solomon & Rabolt (2009, p. 12).

As we can see in the figure above, a normal fashion life cycle starts with the innovation and rise of a certain trend (introduction stage). Then, it gains in popularity and reaches the peak of the trend (acceptance stage). And, eventually, in the regression stage, that trend gradually declines as time goes by, until it becomes obsolete, and a new style arises.

However, the length and shape of the fashion cycle depend on the different kinds of fashion. Some are longer-lived; others shorter-lived, and the stages can also vary. Apart from the normal life cycle and considering the relative length of acceptance cycle, there are other three kinds of life cycle curves: Fad, moderate fashion and classic. We take the suggestion of Wang (2010, p.9) in her thesis *Consumer behavior: characteristics in fast fashion*, as she includes the position of Fast fashion, in order to better understand the term:

Figure 2. Comparison among fad, fast fashion, moderate fashion and classic.



Source: *Consumer behavior: characteristics in fast fashion*, Wang (2010, p.9).

We observe in the figure above, that fast fashion is located between moderate fashion and fad. A fad is a short-lived fashion that suddenly becomes popular and quickly disappears. Fads can be accompanied by a craze or mania by consumers, and retailers may find it difficult to keep the item in stock. On the other hand, classics are those trends or styles that seem to be acceptable or in good taste anytime, any place (Solomon & Rabolt 2009, p. 16).

Finally, from a business perspective, Liz & Gaynor, (2006, p. 259) define fast fashion as a strategy which aims to reduce the processes involved in the buying cycle and lead times for getting new fashion product into stores, in order to satisfy consumer demand at its peak.

As we continue now with chapter 3, we will observe in depth how Inditex Group is considered the world's largest fashion retailer, according to Reuters (March 15, 2013). We will see how Zara integrates the key points of fast fashion, mass fashion and retailing, in a well-defined global strategy, and why Zara emphasizes on the key factor of quick response in all the phases of its business model.

Chapter 3. Zara: an Overview

The first Zara store was opened in 1975, in downtown A Coruña, and after 38 years, there are 1,763 stores in the world. During the 2012 financial year (1 February 2012 to 31 January 2013), Inditex's net sales rose by 16%, from 2011 with 13.8 billion euros, to 15.9 billion euros. Figures demonstrate that Zara is the leader in growth and sales revenues. Zara's unconventional approach of global fast fashion makes it a significant case for study and discussion.

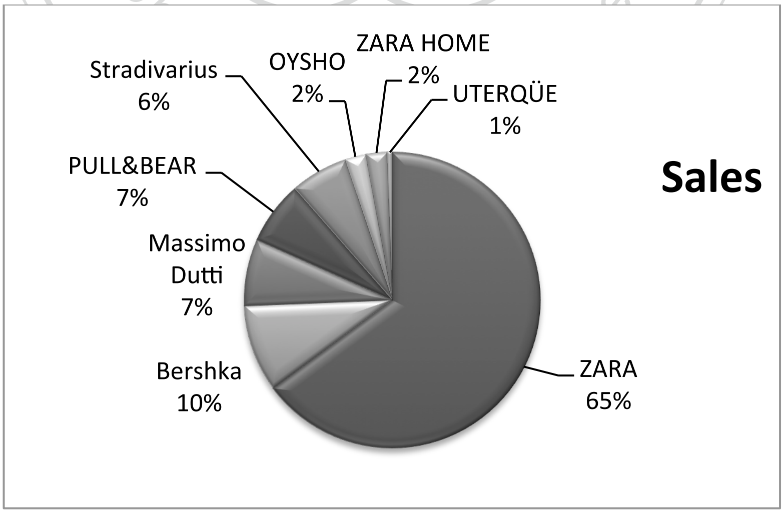
This third chapter is entirely focused on Zara. First we review the history of Inditex Group, Zara and the man behind such a fast fashion empire. Second, we go through the business model, as well as the marketing and (zero) advertising strategy that the Group follows. Then, we look at what is the current position of Zara in its home market, Spain, and finally, contrast it with the expansion of the fashion retailer worldwide, with special emphasis on Asia and recently, on Taiwan.

For this chapter, we use several sources: the Inditex 2011 Annual Report, the press releases from Inditex, the results of March 13, 2013 and the latest update of stores of April 30, 2013. But the main source is the book *Zara: Visión y estrategia de Amancio Ortega* ("Zara: vision and strategy of Amancio Ortega"), in which journalist David Martínez analyzes the principles and strategies governing Inditex in order to understand its business model, as well as to get to know the creator and co-founder. And we will look in depth the sections dedicated to the beginnings of Inditex and the key points for its business model, in order to understand the reasons behind the success of Inditex and Zara, along with the exponential growth of Zara stores worldwide.

3.1 Inditex, Zara and Amancio Ortega

Industria de Diseño Textil, S.A. (Textile Design Industry) more commonly known as Inditex Group, is one of the largest fashion distribution groups worldwide, and its headquarters are located in Arteixo, a town near the province of A Coruña, in the region of Galicia, on the northwest of Spain. Inditex is a holding company made up of more than 100 companies operating in textile design, manufacturing and distribution. The Group is present in eight retail formats: Zara, Pull & Bear, Massimo Dutti, Bershka, Stradivarius, Oysho, Zara Home and Uterqüe. Inditex has a total of 6,058 stores in 86 markets across five continents, according to the latest update on April 30, 2013. Inditex was founded in 1985, ten years after the opening of the first Zara store, on a street in downtown A Coruña. Zara is Inditex's flagship chain store: it is the largest and most internationalized of all the store formats, and competes directly and internally with the other seven brands. During the 2012 financial year, Inditex's net sales rose to 15.9 billion euros. And Zara alone contributed a 64.8% to the total sales, with net sales of 8,938 million euros.

Figure 3. Sales contribution by the eight chains within Inditex (See also Appendix 1).



Source: Inditex 2011 Annual Report

There is no doubt that Zara is the leader in growth and sales revenues. With 9.5%, Bershka is the second chain store and it appeals to the youngest target market, by bringing trends from street fashion, music and art. Massimo Dutti ranks the third position (7.3%) and appeals to independent, urban and cosmopolitan men and women. The fourth one is Pull&Bear, which contributes 6.9% and is specialized in casual, laid-back fashion within a global youth culture. Stradivarius is in the fifth position, with 6.3%, and is aimed to young people who crave an informal, funky look. A contribution of 2.3%, Oysho offers women's lingerie and intimate apparel. Also with 2.3%, Zara Home specializes in home decor and linens. In the last position with a contribution of 0.5%, we find Uterqüe, which was launched in 2008 and offers a more elegant and sophisticated fashion. We can observe that each of the eight retail formats have their own distinctive characteristics, and their clear fashion objectives allows shoppers to distinguish them.

Below we compare Zara's figures with the rest of the chain stores within the Inditex group, by aggregating them into one group called "Non Zara". We also notice that all figures have slightly decreased from 2011 to 2012.

Figure 4. Comparison of sales percentages between Zara and the other seven brands, during the financial years 2011 and 2012 (See also Appendix 2).

Concept	**FY 2012**	**FY 2011**
Zara	66.1%	64.8%
Non Zara	33.9%	35.2%
Pull&Bear	6.8%	6.9%
Massimo Dutti	7.1%	7.3%
Bershka	9.3%	9.5%

Stradivarius	6.0%	6.3%
Oysho	2.0%	2.3%
Zara Home	2.2%	2.3%
Uterqüe	0.5%	0.5%

Source: Inditex Financial Year 2012 Results Presentation

Amancio Ortega Gaona, best known as Amancio Ortega, is the man behind Zara's fast fashion empire. Although he stepped down from the helm of Inditex in July 2011 and handed over the presidency to Pablo Isla, CEO and former Deputy Chairman of the company, Ortega continues as the majority shareholder of the company, from which he owns nearly 60%. In early March 2013, magazine Forbes listed Ortega as the third richest man in the world, with a net worth of $57 billion.

Ortega was born on March 28, 1936 in León, northwest of Spain. In 1944, the whole family moved to A Coruña because of his father's job as a railway worker. When he turned 11, he decided to give up school. At the age of 14, he went to work as a delivery boy to help feed his family, in a small shirt maker's shop called "Gala". There, he focused on the importance of offering products directly to the customer, without intermediaries and generating almost no stocks. Today, this principle is reflected in Zara's business model: simplification to the maximum in the number of intermediaries between the design phase until the moment the fashion item gets to the customer. Thus, all decisions (from design to distribution) are made in the Inditex headquarters in Arteixo. Indeed, the most important factor for Inditex is 'time' (Martínez, 2012, p. 131), which can be well illustrated by the rapid turnover of collections. We also remark that the total amount of garments that Inditex creates is impressive: a total of 900 million every year and, within a team of over 300 designers, 200 are only dedicated to Zara (Martínez, 2012, p. 71, 127).

Years later, he moved to a bigger clothing shop called "La Maja". Customers came from both wealthy families and the emergent middle-class, which started to have an interest in ways of dressing, after years of hard work and during the post-civil war era in Spain. In La Maja, Ortega made contact with fabric manufacturers from Catalonia (northeastern region of Spain), who allowed him access to wholesale prices. He then understood how important it is to integrate and control fabric supply and manufacturing within the business strategy. He also learned to focus on the customers' tastes and preferences. Therefore, Zara has kept firmly the idea that it is the customers who dictate the designer what they want to wear, and not the way around. As Martínez (2012, p. 61) points out, for Ortega, the designer is rather an editor of what is being sold in the world, than a creator.

On the other hand, La Maja had several stores spread strategically all over the city of A Coruña, which made Ortega apply this strategic location for his future business: Zara stores are located in heavily trafficked areas, such as wide streets or shopping zones, to attract as many customers as possible. Zara especially establishes its stores in landmark locations such as the Corso Vittorio Emanuele II in Milan and considered the oldest shopping mall in Italy, a Baroque-style 18^{th}-century convent in Salamanca in Spain or the Taipei 101 building in Taiwan. To approve the opening of an Inditex store, the Group analyzes the following five factors (Martínez, 2012, p. 100): the typology of the customers, the capacity of acquisition, the presence of other textile companies, the channels of sales and the evolution of demand.

Ortega left La Maja and, along with his wife, Ortega's brother and wife, founded the company Confecciones GOA ("Dressmaking GOA" – GOA was the acronym upside down of Amancio Ortega Gaona). According to Martínez (2012) Ortega started to adapt the production costs to the estimated quantity of clothes to sell, as they 'know' the customers' needs and/or desires (p. 47). They made and sold fine comfortable bathrobes, aimed to both the working woman and the woman who wanted to dress well at home. Therefore, these bathrobes could cover all social segments. Ortega started to focus on the textile needs of the Spanish women, in those days when fashion used to come from Paris and Milan. This is the beginning of the process of Zara. Thus, Ortega was determined to commercialize simple, beautiful and comfortable clothing at affordable prices, lower than those from his competitors and with a similar or superior quality.

Ortega wanted to run his own business, so he left GOA. The first Zara store was opened in 1975, in downtown A Coruña. During the following years, Zara extended its network of stores to major Spanish cities. In 1988 Zara opened its first store abroad, in Oporto, Portugal. The next locations were in New York (1989) and Paris (1990).

After we have reviewed the background of Inditex and Zara, we summarize now the main key points of the Zara:

1. Production of medium-quality fashion clothing at an affordable price;
2. Simplification of intermediaries in the business model;
3. The rapid turnover of collections;
4. Heavy investment of stores in landmark locations.

As we can see, the maxim of Zara is to create and commercialize a global fashion, at affordable prices. In addition, Zara applies the concept of fast fashion: they absorb the trends from the streets and bring them to the stores in the shortest time possible. In the following section we will look in depth the successful business model of Zara.

3.1.1 Zara: Business model

As Martínez (2012) writes, Zara considers the customer as their information source and not just a mere receiver of products (p. 120). Zara has kept firmly the idea that it is the customers who dictate the designer what they want to wear, and not the way around. As one executive of Zara explains (Martínez, 2012, p. 121):

> We first observe the social environment, like restaurants, concerts, streets, in order to anticipate a fashion trend that customers are looking for, to anticipate a collection, bring them to the market and wait for the acceptance of the market, and then eventually, the clothes are designed, made and distributed.

Store managers report every day to the headquarters in Arteixo (A Coruña) what the customers buy, don't buy and what their preferences and/or complaints are (Martínez, 2012, p. 76). In contrast to luxury brands, Zara, and to a further extent, other fast fashion brands too, they respond to consumers' preferences. All this allows designers to work on a sure thing. In a way, customers determine production and Zara modifies consumer behavior. The production of each item is limited, thus its short available time in the stores creates a feeling of "scarcity" in consumer's perception. This rapid turnover of collections permits, on the one hand, to attract customers to go back often to the store, as it creates expectations: "If you don't buy it now, it won't be there later." On the other hand, products can be sold at a full price, without having them to be returned; hence, there are almost non-existent stocks.

Once the team selects a prototype for production, the designers refine colors and textures on a computer-aided design system (Ferdows, Lewis & Machuca, 2004). In Inditex's headquarters, over 130,000 square meters of cloth are marked and cut every day, and clothing models are designed. All those pieces of cloth and the correspondent accessories for each clothing are sent to the sewing workshops -a few owned by Inditex itself and the rest, subcontracted. After the garment is produced, it is sent back to the headquarters to be controlled, ironed and packed up before delivering to the stores (Martínez, 2012, p. 130). Therefore, every store in the world receives new collections twice a week from one of the ten logistics centers, all owned by Inditex and located in Spain. From the logistics centers, the product reaches European stores in 24-36 hours (via railway) and those in the rest of the world, within 48 hours (via air). Another executive explains (Martínez, 2012, p. 123) that for wardrobe basics, from the moment they know which models have been the most bought until new models are produced, it may take three weeks, while for the rest of models (more sophisticated ones), it may take five weeks. Though, according to Martínez (2012) Zara's two seasons are indeed presented during January-February and August-September, and at different times from the usual one of the fashion industry (April-June and September-December). And, during the season, Zara launches new designs, mostly, new trends -40%, 50% of the production- but also some 'basics' - a fixed collection that is never outdated. Only 'basics' count for 60% of the production (p. 127).

Figure 5. Business model of the Inditex Group (See also Appendix 3).

STORE	6,009 stores worldwide, across five continents.
DESIGN	Over 1,000 professionals in products design and development.
MANUFACTURING	Over 50% of Inditex's manufacturing takes place in suppliers from proximity. And, over 1,300 suppliers.

DISTRIBUTION	Every store in the world receives new models twice a week from the logistics centers of each one of the chains, all of which are located in Spain. From the logistics centers, the product reaches European stores in 24-36 hours and those in the rest of the world within 48 hours.

Source: 2011 Inditex Annual Report

This business model is a simple illustration of the complex and well-integrated business strategy of Inditex, as it is reduced to four phases: store, design, manufacturing and distribution. Here we can observe how the company gives priority to the store "section", where the model starts and comes back again to know about the customers' preferences through the store managers' reports. However, we include the supply phase along the three last phases (design, manufacturing and distribution), due to the significance of materials, fabrics, and technology in the whole process. Even so, the number of suppliers (over 1,300) is mentioned. Similarly, it informs about the quantity of employees (until March 13, 2013, a total of 120,314), the number of investors (over 60,000 shareholders), as well as the number of followers in Facebook (over 21 million), which the chart has put under the title of customers. Inditex adds figures about the community factor, by remarking the over 600,000 beneficiaries of social programmes.

After we have read an excerpt of Ferdows, Lewis & Machuca from their paper *Zara's secret for fast fashion* (2004), we understand that the fundamental key point on the success of Zara's business model is the constant exchange of information throughout every part of

Zara's supply chain—from customers to store managers, from store managers to market specialists and designers, from designers to production staff, from buyers to subcontractors, from warehouse managers to distributors, and so on. While most companies insert layers of bureaucracy that can delay communication between departments, in Zara though, the organization, operational procedures, performance measures, and even Arteixo's layouts are all designed to make information transfer easy.

After understanding the business model of Zara, we can observe that this homogeneous strategy permits Zara to bring its global image to customers in any of its stores worldwide. In short, this business model is successful because of the efficiency in time and costs of all the strategy phases, as well as the rapid turnover of collections.

This turnover is reflected in the feeling of "scarcity" of Zara items. This is similar to what high fashion brands or Haute couture make fashion consumers to think: products are limited, original and exclusive. Zara uses many different fabrics of inferior quality than those from Haute couture; Zara creates models in mass quantities (Prêt-à-porter), but limited, without stock and in a short period of time. Therefore, consumers might perceive Zara items as reproductions of high fashion brands, but with several sizes and offering more variety of styles. Somehow, Zara has combined features of two modalities of clothing.

3.1.2 Zara: Marketing and (zero) Advertising

Zara uses only 0,3% for its marketing expenditure, in contrast to what other brands do, such as the American Gap and the Swedish H&M, which expend 5% and 4% respectively every year. Even in the Inditex 2011 Annual Report we find no section of advertising. Zara does not produce any big advertising campaign; plus, in online catalogues, Zara does not contract famous models.

Zara only advertises itself, and in a discreet way, in newspapers, to give announcements about: the two seasonal deals (winter and summer), the opening of a new store and the company's General Shareholders Meeting (every year in July). Martínez (2012, p. 73) borrows the view of Jesús Echevarría, who argues that the main and only “advertising” is the stores: “There is no advertising. Thus, this means that we do not want to create a perception, or give a pressure to customers with a specific collection or garment. Though, we want to know continuously what the customers want”.

Zara invests rather in the element ‘store’, which reflects in the acquisition of a landmark location and the store interiors design. Zara stores also play a double role: to be the company’s face and to generate important information from customers’ preferences. To achieve this, stores are located strategically in the main cities of the world, in wide streets, avenues and shopping areas. As Martínez (2012, p. 49) writes, Ortega considers that “the best advertising is being in the best street”. Store window displays are renovated once a month, while store decoration changes every two years. There is even, a ‘subterranean world’ in Arteixo, where Zara stores are reproduced at a real scale model, where interior designers, clothes designers can work at a ‘real’ store, the same one, which a customer will visit (p. 70, 73). Thus, Zara invests heavily in store locations, decorations and windows displays.

However, for Zara (and in general, for any brand), the most effective tool of marketing is the word-of-mouth. To understand this concept, Royo-Vela and Casamassima (2010, p. 522) cite three authors: Word-of-mouth (henceforth WOM) is defined by some researchers as an individual’s predisposition to purchase a product (Arndt, 1968) and the intention to pass along WOM communication about a specific product (Brown and Reingen, 1987). Indeed, a word-of-mouth communication is more effective than any advertising campaign in the sense that, it changes customers' attitude towards a brand. Similarly, Ferdows, Lewis and Machuca (2003, p. 63) cite marketing executive Miguel Diaz: "Our stores and word-of-mouth, do the advertising for us."

As we can observe, Zara gives the maximum priority to the stores. Zara invests heavily in opening stores at strategic locations with a great influx of crowds, and in the main cities of the world. After the location acquisition, the company focuses on the decoration of the stores. The final phase of the "advertisement" lies on the way the garments are placed. Above all, Zara can attribute part of its success to the effective advertising tool of the 'simple' word of mouth communication.

3.2 Zara: current situation

Here we will focus on the current situation of Zara in its home market Spain, the expansion worldwide that Zara has achieved, with an emphasis on Asian market and finally, the position of Zara in Taiwan.

3.2.1 Zara in Spain

For the last years, Spain is suffering the worst recession of its history, with an unemployment rate of 26.70%, from which a 55.90% reaches people under 25 years (datosmacro.com, March 2013), a public debt hitting a new record of 84.1% of gross domestic product at the end of 2012 (Agence France-Presse, March 15, 2013) along with increasing budget cuts in the public sector; a recession surrounded by continuous protests of outraged citizens. However, one Spanish company stands out.

Today, there are a total of 327 Zara stores in Spain. According to an article published in El País on the same day the company presented its results of 2012, although Inditex's profits continue to increase, the company's sales in Spain fell 5% due to a value added tax increase (effective since September 2012). The company decided to absorb a 3% of VAT (from 18% up to 21%), "in order to avoid the rise of prices for the customers," explained Pablo Isla, CEO and Chairman of Inditex. However, this has little affected to the final results of 2012 financial year. Indeed, Spain is becoming a smaller piece of its business, as sales in its home market now represent only 21% of the total revenue, in contrast to the 25% in 2011.

On the other hand, the Group created 10,802 new jobs worldwide in 2012, from which 500 were in Spain; the total workforce reaches to 120,314 employees. Inditex also announced that in 2013 there is no plan to open any Inditex store in Spain, where for the first time there has been a slowdown of total stores: from 1,930 (Year 2012) to 1,901 (until April 30, 2013). However, there will be re-openings (in April 2014) such as the Zara store located on the street of Gran Vía (Madrid) under reform stage. As well, another Zara store is planned to be open by 2014 and will become the main flagship Zara store in Spain, whose aesthetic will look like exactly as the one in 666 Fifth Avenue, New York.

Nonetheless, Isla points out that given the crisis Spain is going through, there are some positive facts such as an increase of confidence in shareholders and the balance of payments. He states, "We have to be aware that we are in a difficult situation and we can't relax, neither the Government nor the companies." While the Spanish market has nearly non-existent movement, revenues in Zara continue to increase thanks to the expansions in America and Asia.

3.2.2 Zara: expansion worldwide

By April 30, 2013 Zara reached a total of 1,763 stores worldwide. As we have mentioned before, in general, Inditex's net sales rose by 16% from 2011, to 15.9 billion euros (Inditex.com) thanks to the expansions in America and Asia. Zara, as the largest and most internationalized brand of Inditex, and the principle driver of the Group's growth (sales grew in 2011 by 10% up to 8,938 millions euros) is no exception.

Figure 6. Inditex stores worldwide, classified in the eight retail formats

(See also Appendix 4).

Inditex stores around the world	
Zara	1,763
*Zara Kids	171
Pull&Bear	817
Massimo Dutti	630
Bershka	899
Stradivarius	794
Oysho	529
Zara Home	364
Uterqüe	91
TOTAL	6,058

Source: inditex.com

Zara leads the list, while Zara Kid alone ranks in the eighth position, with 171 stores. In the second position, it's the 899 Bershka stores present in 64 markets; The next one is

Pull&Bear, with 817 stores across 59 countries; Stradivarius with 794 stores open in 53 countries ranks the forth position; Then comes Massimo Dutti on the fifth position with 630 stores in 61 countries; 529 Oysho stores are present in 37 countries; On the seventh position, we find Zara Home with 364 stores open in 37 countries; In the last position it's Uterqüe, which was launched in 2008 and is now present across 18 countries with 91 stores.

Inditex has not only physical stores around the world, but also online stores, in 23 countries. Within the Group, the major online chain store is currently Zara. Below we can see the brief history of the global online sales within the Inditex Group:

Figure 7. History of global online sales of the chain stores in Inditex (See also Appendix 5).

Date	Store	Countries
29 Oct 2007	Zara Home	Europe: Austria, Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Luxembourg, Monaco, Netherlands, Portugal, Spain, Sweden, UK, Switzerland, Norway, Finland, Poland
2 Sept 2010	Zara	Spain, Portugal, France, Germany, Italy, UK
4 Nov 2010	Zara	Netherlands, Belgium, Luxembourg, Austria,

		Ireland
3 March 2011	Zara	Switzerland, Monaco, Sweden, Denmark, Norway
From 6 Sept 2011	Massimo Dutti, Bershka, Pull&Bear, Stradivarius, Oysho, Uterqüe	Europe
7 Sept 2011	Zara	United States
20 Oct 2011	Zara	Japan
7 March 2012	Zara	Poland
5 Sept 2012	Zara	China
Oct 2012	Massimo Dutti, Zara Home	United States
6 March 2013	Zara	Canada

Source: Inditex FY 2012 Results Presentation (March 13, 2013)

Inditex started to offer an online platform for sales from October 29, 2007 with the launch of Zara Home across 19 countries in Europe. In the period from September 2010 to March 3, 2011, Zara was launched three times in several European countries. From September 6, 2011, non-Zara stores (Massimo Dutti, Bershka, Pull&Bear, Stradivarius, Oysho and Uterqüe) began to sell online across Europe. A day after, Zara finally embarked outside Europe: United States; followed by Japan (October 20, 2011) and China (September 5, 2012). Poland was also launched in 2012. In this same year, United States was chosen for the first launch of stores other than Zara: Massimo Dutti and Zara Home. In the recent results we find two notable launches: Zara online store was launched in Canada on March 6, 2013, and is set to do the same in the Russian Federation during the Autumn/Winter 2013 season. However, Inditex did not publish any information about the online sales, but taking into account the exponential presence of online stores in 23 markets, online shopping is indeed viewed as a major engine for future growth.

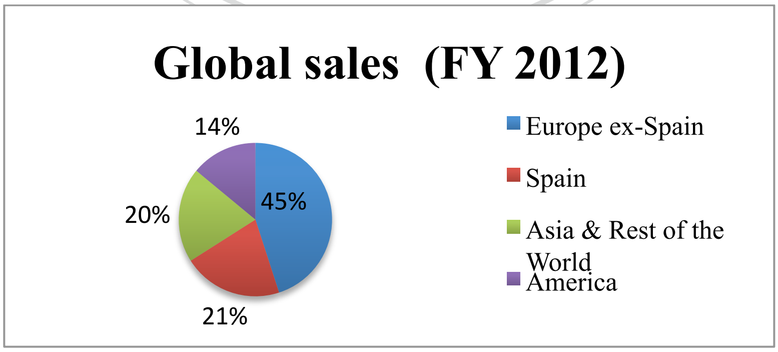
As we commented above, America and Asia are key markets for the Group:

Figure 8. Global sales of Inditex during the FY of 2012 and 2011. (See also Appendix 6).

Store sales (%)	FY 2012	FY 2011
Europe, (except Spain)	45%	45%
Spain	21%	25%
Asia and rest of the world	20%	18%
Americas	14%	12%

Source: Inditex FY 2012 Results Presentation (13 March 2013)

Figure 9: Global sales of Inditex during financial year 2012 (See also Appendix 6).



Source: Inditex FY 2012 Results Presentation (13 March 2013)

In the charts above we see that Inditex sales at home represent in 2012 only 21% of the total revenue, in contrast to the 25% in 2011. Whereas, Asian market increased from 18% to 20%, as well as America, whose market increased two points (12% up to 14%). In contrast, Europe (without Spain) continues to be the geographical area in which most sales are produced, and during the 2012 financial year keeps the same percentage (45%). Asia is the market in which Inditex has grown most in recent years. Currently there are 326 Zara stores, spread over China, South Korea, Taiwan, Japan, Philippines, India, Thailand, Singapore, Malaysia and Indonesia. Nonetheless, we point out here a small but interesting (and contradictory) detail: when it comes to studies of results and annual reports, Asia is still counted along with the area of the 'rest of the world' (Africa and Oceania). This makes a difference for those who analyze the phenomenon of Zara in Asia, as it needs to count figures of Asia separately from 'the rest of the world'. This contrast with what Martínez (2012, p. 98) says regarding to the Asian market: the growth in Asia is strategic for Inditex and along with Europe, is priority in the expansion of the company.

To illustrate the chart below we have counted the Zara stores country by country. We can see the presence of Zara stores in those Asian countries:

Figure 10. Zara stores in Asia during the financial years 2011, 2012 and latest update.

	2011 Financial Year	2012 Financial Year	Latest update 30th April 2013
China	127	138 (increase: 11)	140 (increase: 2)
South Korea	39	39	42 (increase: 3)
Taiwan	5	5	5

Japan	82	83 (increase: 1)	88 (increase: 5)
Philippines	6	6	6
India	9	9	10 (increase: 1)
Thailand	7	8 (increase: 1)	8
Singapore	7	7	7
Malaysia	9	9	9
Indonesia	11	11	11
TOTAL	302	315 (increase: 13)	326 (increase: 11)

Source: inditex.com

We can observe how the Asian market plays a significant role for Zara and to a further extent, for the whole Group. China ranks the first position, with 140 Zara stores today, which means an increase of two stores, if we compare with the 2012 financial year. With 88 stores, Japan is the second country. South Korea is the third market, with 42 stores. These three countries are followed by Indonesia (11 Zara stores), India (10), Malaysia (9), Thailand (8), Singapore (7), Philippines (6) and Taiwan (5). In addition to the new two stores in China in April 30, 2013, Japan, South Korea and India are the other countries, in which there are new Zara stores.

During the 2012 financial year, there were 315 Zara stores in Asia (95 in the 'rest of the world'), compared to the 326 Zara stores of April 30, 2013 (98 in the 'rest of the world'). After reviewing these figures, we can affirm that America and Asia are key markets for Zara, and for the rest of Inditex. While figures in Europe (without Spain) remains stabilized and Spain seems not to move further, it is clear that Zara will continue to focus on the markets of

America and Asia.

3.2.3 Zara in Taiwan

Zara arrived to Taiwan on 5th November 2011. The first store opened in the landmark location of Taipei 101 building. And since then, there are currently five stores in total. Three are in Taipei: Apart from one in the first floor of Taipei 101, the second store was opened in Zhongxiao East Road Sec 4 — a bustling shopping belt in Taipei's eastern district (Taipei Times). The third one is located in the shopping mall of Q Square close to Taipei Bus station, a key location both for shoppers and travellers. Leaving the capital behind, the fourth store is located in Taichung in the department store of Tiger City. And, going south, we find the fifth store in Kaohsiung, in the department store of Hanshin Arena.

Figure 11. Presence of Inditex stores in Taiwan (See also Appendix 7).

Inditex stores in Taiwan	
Zara	5
*Zara Kids	-
Pull&Bear	-
Massimo Dutti	1
Bershka	-
Stradivarius	-
Oysho	-
Zara Home	-
Uterqüe	-
TOTAL	6

Source: inditex.com

In this chart we can notice as well, that Massimo Dutti is the sixth Inditex store open recently, in November 2012, in Taipei 101 -same location as the first Zara store. On the opening day of the first Zara store, Jesús Echevarría, director of communication of Inditex, explained that the pricing strategy for the Taiwanese market would be the same as that of Hong Kong. The location of the first store is critical, as it aims to make an impression in debuting its fashion brand, and that was why the Taiwanese landmark was a perfect choice to house the two-story outlet (2,314 square meters) Jesús Echevarría added (Taipei Times). An article published in *El Economista*, on the opening day of the first Zara store, cited Michael Liu, spokesman for Taipei Financial Center Corporation: "the arrival of Zara in the Taipei 101 will make the traffic of customers increase a 5%".

On that 5 November 2011, people patiently queued for hours to get in the packed store in the Taipei 101 mall. Was it merely because of the clothing? In any case, how is Zara introduced in the Taiwanese general public, if Zara has not ever done any advertising? We have a look now at the very first coverage of Zara in the Taiwanese media.

"*I can be confident enough to say that, the first Taiwanese media to put Zara into public opinion in Taiwan, is the magazine 遠見 Global Views Monthly*." (我真的可以很自信地說，放眼台灣的媒體與大眾，第一個把 ZARA 這家公司引進台灣的正是《遠見》雜誌。), says author Ma-li Yang 楊瑪利, in the special issue *Must understand: the success of fashion tycoons* (非懂不可時尚首富成功經), published in December 2011. She is referring to the 52-pages Zara report published in Global Views Monthly in December 2006, five years before Zara arrived, finally, in Taiwan, and which served as the cover of the monthly magazine issue no. 246.

Figure 12: Zara cover story in magazine 遠見 Global Views Monthly.

Source: magazine 遠見 Global Views Monthly

In early November 2006, three journalists of this magazine flew to Inditex headquarters in Arteixo to interview staff and write a report about Zara. As they recalled, in Taiwan at that time only few people working in fashion, advertising, department stores or people who had traveled abroad and shopped would have heard about this Spanish brand called Zara. But the majority of Taiwanese readers hadn't actually ever heard of Zara or seen it. Even when the report was published (2006), many readers looked astonished at the cover and asked, "*what do those four English letters mean? What article has Global Views Monthly covered this month?*"

The journalists observed that many individuals from both academic fields of international management and clothing industry were enthusiastically discussing about the concepts of fast fashion and luxurious items with a fair price. Even the Harvard Business School took Zara as a case study in 2003 (Ghemawat & Nueno). As well, many English-language mainstream magazines were continuously reporting about Zara. Therefore, the magazine thought this was going to be a brand new fashion to be spread all over Asia and Taiwan.

And, indeed, ever since the report was published, Zara became very popular in Taiwan. Even this particular Zara magazine issue was put on the counter of some clothing stores in Taipei, in which staff was selling Zara items brought back straight from abroad. Hence, the

Zara issue would be used as a way to communicate with the consumers. Nonetheless, everyone would wonder: "*When is Zara going to come to Taiwan? Every time my colleagues go abroad would go to Zara right away, and buy a lot of items. Why doesn't Zara come to Taiwan?*" points out the report, after having a brief chat with a person working at an advertising company.

Through the 11 chapters, the extensive report not only covers the history, the strategy and the key points of the company, along with the figure of Amancio Ortega, but also significant interviews with staff, such as Jesús Echevarría, factory managers and designers. On the other hand, it includes a brief introduction of another Spanish fashion clothing brand, as well as a summary of the ten main features in global fashion consumption. We point out the response of Echevarría as he is asked why Zara has not arrived to Taiwan yet and when will the first Zara store open in Taiwan. "*Some day for sure, soon. Please kindly wait.*"

Five years passed by since that Zara report was published. During this time, H&M and Uniqlo have also been appearing on the spotlight. Uniqlo arrived in Taiwan in 2010, while H&M has not yet. Taking into account that the individuals behind those three big brands are the fashion tycoons of Spain, Sweden and Japan, plus the highly expected arrival of Zara in Taiwan, those journalists conducted a second field trip to Arteixo in October 2011, in order to do further interviews. The special issue *Must understand: the success of fashion tycoons* (非懂不可時尚首富成功經), published in December 2011 -just one month after the opening of the first two Zara stores in Taiwan (Taipei 101 and Dongqu)- did an extensive comparative report of the three brands. The goal of the report is to reflect on what and how Taiwan can learn from them. It also includes the perspectives of two professors and one professional about the topic.

The report reveals the reasons why these brands, which were originally not interested in the Taiwanese market, have suddenly fallen in love with Taiwan. The main reason is: the economy both in Europe and in Japan are not as prosperous as it used to be, so they are urged to develop more internationally. Other reasons are: the prohibition of imported clothes 'Made in China' to Taiwan is lifted in 2008 and signed through the Economic Cooperation Framework Agreement (ECFA) between China and Taiwan; the enhancement of Taiwanese consumption; and, the increasing arrival of tourists in Taiwan, especially Mainland Chinese, have made of Taipei a more internationalized city.

We can observe and verify how the reports about Zara published by 遠見 (especially the issue of 2006) have made the majority of Taiwanese consumers get to know Zara before it came to Taiwan. It's impressive how these reports have indirectly functioned as a form of advertising for Zara in Taiwan, even five years before its arrival in the country.

After we have covered the first half of the thesis with three chapters (Introduction, Literature Review and Zara), we will continue in the further chapters with the research of the consumer behavior in Zara stores in Taiwan, and analysis of results. In the last chapter we will make a conclusion for our study, along with a discussion.

Chapter 4. Research and Analysis

After we have reviewed the production and consumption of fashion and the current situation of Zara worldwide, with a special focus in Taiwan, here in chapter 4 we will analyze the consumption behavior among Taiwanese consumers in the Zara stores in Taiwan.

The present chapter is divided into three parts. In the first part, we focus on 10 customers (including two visitors who do not purchase) of Zara stores in Taiwan. We will conduct and record open-ended interviews with seven customers, as well as run an online interview via emails with three customers. In the second part we include a field trip with a fashion consumer to the Zara store in Dongqu 東區 (East District shopping area), located in Taipei. She was selected because she is very familiar with Zara items and the brand itself. Therefore, we propose in total 11 individuals for our research. The study does not point out any of the five stores in Taiwan from which to choose the interviewees. The reason is that it results to be irrelevant for our research since all customers perceive Zara as a brand and clothing retailer, without being specific about a particular Zara store. Nonetheless, we will describe the significance of the Dongqu area for the Taiwanese consumers. Finally, for the last part, we conduct phone interviews with two Zara store assistants, in order to get to know the other side, the one behind the counter.

Information regarding the customer profile in Taiwan is not provided by either the websites of Inditex and Zara, or any Inditex annual reports. Although we encountered limitations in our attempt to contact the Communication Department of Zara in Taiwan, we obtained two pieces of information that could guide us in our selection of interviewees. The first one comes from the magazine Global Views Monthly. For their special issue *Must* *understand: the success of fashion tycoons* (非懂不可時尚首富成功經), the journalists made a second field trip in Arteixo (October 2011) and interviewed staff in the main positions in Inditex. The magazine summarizes in one phrase about the position of the products in Zara (產品定位): "Products at Zara are considered fashionable and of good quality, mostly designed for women. (款式接近精品時尚，女性商品多)". As Zara promotes the philosophy that they offer what the customer wants, and since the majority of products is addressed to the female consumer, we decided to select female interviewees. On the other hand, the second piece of information comes from phone interviews with two Zara store assistants. The one who works at the Zara store in Kaohsiung city commented: "to illustrate the profile of the consumer of Zara in Taiwan is difficult, as it depends on which area of Taiwan, location of the store and section (man, woman, TRF, kids)." The second store assistant works at the Zara in Taipei 101, and said: "They are mostly women aged between 20 and 30."

Eventually, we decided to select female interviewees aged between 20 and 30, who have visited one Zara store in the last month, and at least once. The overview of our 11 individuals are summarized in the following points:

1. They have visited, at least, one Zara store in Taipei;

2. Six are university students (from which three are part-time);

3. Six are aged 20-22 (university students of third and fourth year), two are aged 23-27, two are aged 28-32 and one is aged 33-40;

4. Eight of them receive a monthly income below 30,000 NTD, two earn between 30,000 and 50,000 NTD and one earns over 50,000 NTD;

5. Regarding the monthly spending in Zara: two spend below 990 NTD, three spend

between 1,000 and 1,990 NTD, and four between 2,000 and 2,990 NTD;

6. We also include two visitors who have never purchased in Zara, because their cases and their comments regarding the social phenomenon in Taiwan surrounding Zara are relevant to our study.

For further understanding, see chart of interviewees in Appendix 8 and questionnaire for customers in Appendix 9.

In the beginning, we indeed considered whether to find interviewees who work full-time and have a “comfortable” monthly income. However, although Zara is considered an affordable luxury, in our case we have found that there is no direct link between having a full-time job and the perception of Zara in Taiwan. Indeed, some university students take much part in this social and fashion phenomenon of Zara. Therefore, we decided to take into account their comments as well, as we will observe later, they give us relevant insights for our research.

After we have conducted the interviews, we analyzed the interviewees’ opinions and classified them according to seven questions:

1. Perception of Zara in Taiwan
2. Taiwanese style and Zara
3. Value of Zara in Taiwan
4. Position of Zara among other brands in Taiwan
5. Impacts of Zara on the consumer
6. Impacts of Zara on the consumer’s daily life
7. Reason of Zara’s popularity in Taiwan

Thus, although we have obtained no official main customer profile in the Zara stores in

Taiwan, we can illustrate the typical customer of Zara in Taiwan, based on the characteristics of our interviewees and the information provided by the magazine and the store assistant: a female customer aged between 20 and 30, living in Taipei, and knew Zara before it arrived to Taiwan. She visits a Zara store at least once, (frequently reaching two times) and spends monthly at least 1,000 NTD in Zara (may go up to 2,999 NTD). Her monthly income is usually below 30,000 NTD.

4.1 Interviews with Zara Taiwanese consumers

4.1.1 Perception of Zara in Taiwan

"Zara offers a fair price." Laura

"Zara in Taiwan is more expensive. Quality doesn't match with the prices." Alba

This question not only constitutes the first research question of our study. It will also help us to test whether the consumers' perceptions towards the brand match what Zara promotes. "I perceive Zara as affordable. Because even in comparison to other European-American big brands established in Taiwan, Zara is a bit cheaper," says Jojo, a part-time student who did not hear about Zara before it arrived in Taiwan in 2011. The first moment we met, she showed me happily that she was reading the book *《ZARA 沒有名片的總裁》* (Its Spanish title *Así es Amancio Ortega, el hombre que creó Zara* means literally "This is Amancio Ortega, the man who created Zara"). "The price in Zara is acceptable," says Joanne, who works in international trade and has been to Spain before. As well, Laura, a master student of Telecommunications, who applied for an internship before in Zara, agrees with them:

"Zara offers a fair price." On the other hand, although Louise is also aware about the affordable prices, "Zara is well known precisely because of that," she states she perceives the designs look like low cost. Louise studies at the Department of Japanese and visits a Zara store three times in the last month, but never purchases.

Jojo adds that "many of the clothes in Zara are inspired in models of big brands; this is their reproduction. This is why I consider consuming Zara." Similarly, Vicky, an assistant at a study abroad agency in Kaohsiung city, perceives Zara models fulfilled with design: "I can spend little money and wear clothes that look luxurious at the same time." Indeed, Zara is viewed as an affordable luxury: "luxurious but not expensive". And this is precisely one factor that attracts most of the Zara consumers. However, according to Jojo, "for Taiwanese standards, if you compare Zara with the price tags in the night markets, Zara is still expensive." She also regrets that:

> The quality of the clothes is not very good either, they are easy to get broken, or after several washes it gets yellow or broken. Anyway, it's a bit expensive, but in order to pursue fashion (追流), you are willing to sacrifice your budget.

Alba, a part-time student who has read the first Taiwanese report ever about Zara, published by Global Views Monthly in 2006, also agrees with Jojo:

> Before Zara came to Taiwan, at first I had the impression of Zara as a very luxurious brand, with beautiful styles and cuts. So, according to such styles and cuts, I considered the price not to be that high. But when I checked myself the Zara store in Taiwan, I found out that actually the quality of the clothes isn't that good. Also, I think that Zara in Taiwan is

> more expensive, hence, although the styles are ok but the quality doesn't match with the (high) prices. For example, sometimes I can see that inside some coats, the threads are not well sewed yet.

We can observe that although Zara is perceived as offering an affordable and acceptable price, it's still viewed as expensive for Taiwanese standards and compared to the price tags in night markets. Such perception may occur more likely among consumers with a monthly income below 30,000 NTD. On the other hand, although Zara items are perceived to look like luxurious, the quality of the clothes is considered to be not that good as interviewees expected.

Valeria, a part-time student at the Department of Chinese Literature, has been to a Zara store twice during the last month. She perceives Zara as efficiently carrying a rapid turnover of collections. Jojo also points out this fact:

> I am aware of the rapid turnover of collections. I know that even in Spain they are faster, and in Taiwan it may take longer. But still, the rapid turnover here in Taiwan is impressive: every time I go there, I see new items.

As we mentioned before in Chapter 3, this is one of the main key points in Zara: bring new models twice a week. And as we have observed from the interviewees' comments, this is also the general perception of Zara in Taiwan. Customers see new things every time they go. Every visit is different from the previous one.

Vanessa, who did not know about Zara before it arrived in Taiwan, perceives Zara as a brand of simplicity: "The design of the models is not too showy or gaudy (花俏). I find the style is quite simple. That's why it really fits office workers and job interviews." Vanessa enjoys checking around the Zara stores, because "Zara offers a variety of sizes, and styles that are special and beautiful. I feel curious about what's new in fashion." However, she doesn't make any purchase in Zara because:

> Zara in Taiwan gives the perception that it's clothes worn by people who have a job. Indeed, Zara is rather suitable to dress at the workplace. And university students consider consuming in Zara when they are in third or fourth year and they start to go to job interviews, so they feel the need to do some change in their clothing style. Therefore they would choose Zara. I still don't have to apply for a job, so I don't feel the need to purchase in Zara yet.

As expected, since university students have not entered the job market yet, their budget on clothes is limited. Although some have part-time jobs and are willing to spend a bit more in clothes, for instance, in Jojo's case, she works part-time and has a monthly spending in Zara between 2,000 and 2,990 NTD. We also observe that a reason that university students may consider consuming Zara items is to dress formal for specific occasions, for example, a job interview.

Our interviewees' perceptions of Zara are summarized with the following five points: fair price, affordable luxury, a bit expensive for Taiwanese standards, rapid turnover of collections, clothes with simplicity and for specific occasions. Thus we can verify now that, except for the fact that Zara is still considered expensive in Taiwan, in comparison with other clothing brands, the rest matches with what Zara promotes.

4.1.2 Taiwanese style and Zara

"Clothes (in Zara) don't suit Orientals." Louise

"I prefer the clothes in Zara. After all, the clothes in the night markets look all the same." Rachel

As Vanessa clarifies, the popularity of Japanese and Korean fashion in Taiwan is very significant, especially among youngsters: "Although Zara offers a younger alternative (TRF), youngsters in Taiwan follow Japanese and Korean fashion styles, because they consider the style of Zara is rather oriented to European-American style." We observe that in Taiwan there is a clear differentiation of acceptance towards Zara, as it is perceived as a European fashion style. However, it can also happen that the style of Zara may not be suitable for Taiwanese consumers, as Louise illustrates it with her personal opinion: "Zara would be considered somewhat fashionable, but some of its style is too exaggerated. I mean, the clothes just don't suit Orientals."

As we can see, the fashion style that Zara promotes may not match with the preferences of some Taiwanese fashion and young consumers. It's not only about acceptance towards the brand, but even some kind of rejection. Although Zara promotes a global fashion, for Louise Zara promotes a fashion based on Western fashion system. This is why, she perceives Zara as "too European-American style". She visits a Zara store three times a month but she doesn't buy anything from there. She confesses she just likes to go there and have a look at the designs, because she reaffirms that the style there doesn't suit her: "I still prefer Uniqlo."

On the other hand, Joanne compares the general clothing cuts in Zara with the ones in

Japanese and Korean clothes: "The European clothing dimensions in Zara differ from the Japanese' and Korean's narrow dimensions, therefore the choice of sizes is broader." This statement is related to what Vanessa mentioned in the previous section, that she enjoys checking Zara stores, even though she doesn't make any purchase, because she can see a variety of sizes.

"The style in European Zara stores differs slightly from the ones in Asia. I feel that the styles in the Asian Zara stores are a bit more conservative," says Alice, who has been to Spain before and has bought many items in the Zara stores there. As we observe, those who have visited a Zara store in Spain are more aware of some differences between the models there and the models introduced here in Taiwan. On the other hand, according to Jojo, she finds clothes through Zara to reflect her style:

> In my first and second year of university, I used to go to Shida night market (師大夜市) or Ximending area (西門町) to buy clothes. The inconvenience was when I saw people wearing my same models. You couldn't be unique; you couldn't find your own position in style. After a while, I started to discover what I really wanted to wear: I wanted to dress simpler. Then, I started to read fashion magazines from Europe and the States, and realized that I wanted to search for imported foreign brands in Taiwan, which were not available in night markets. So, when I discovered Zara, I thought it could match my style. Not only that, but also the affordable price attracted me. I could eventually dress clothes with which I could construct my style. Also, I pay attention to the clothes the celebrities wear. With Zara, you can dress differently to

> other people in Taiwan, but at the same time, you can also dress your own style.

In general, the fashion style in Taiwanese night markets is much closer to the one in Japan and Korea. Rachel agrees with Jojo and explains: “I prefer the clothes in Zara. After all, the clothes in the night markets look all the same. For me, the clothes in Zara are more special and the materials are a bit better.” Because they want to have (and show) their own fingerprint on the outfits, they prefer the variety of styles present in Zara to combine clothes.

In my field trip with August, a fashion consumer, she said that the current wave among young people nowadays is to browse through fashion magazines and online clothing shops, to observe what’s new, what’s in fashion. She explains:

> After they have done the ‘fashion research’, young people would check both Zara and the little shops at the back, in the alleys of Dongqu area. Those who are more concerned with the designs of the clothes, rather than with the brand, stress the importance of combining the clothes and create their own style. They want to be unique, not meaning different from the rest, but distinct. They want to have their own style but still, be in fashion. Especially nowadays in Taiwan: TV shows, TV dramas, singers and celebrities are very influential. The general public pays attention to how they dress and how they interact. In general, if we want to define ‘Taiwanese style’, it would be ‘no style’, because the style receives the influence of different cultures and the media.

From our interviewees’ statements we can notice that Zara has indeed made an impact on the overall Taiwanese style. Fashion consumers have now more options with which they can “create” their own style, by combining a bit of here (night markets, alleys or online clothing stores) and a bit of there (Zara). Taiwanese style today can be summarized in a phrase included in the 2011 special issue of the magazine Global Views Montly: “In order to be fashionable, one has to be smart in combining fashion (時髦還要聰明混搭出時尚)”. Therefore, fashion in Taiwan is viewed as a social phenomenon, as fashion does not depend on any social hierarchy. Taiwanese’ own interests and daily life influence their own perspectives towards fashion. Thus, each one determines the directions of fashion change.

We have also observed how symbolic consumption works for some of them. For example, for Jojo and August, the consumption of Zara items is used as an outward expression of their own style, rather than communicating others about their own wealth, social status or sense of group membership. They actually consume the style that Zara items have, in order to express their own style and ultimately, their identity. Thus, as we reviewed before Baudrillard, we can observe Zara items for some of our interviewees do carry a further meaning beyond the mere functional purpose. Zara items have acquired a symbolic value, which these interviewees translate as style.

4.1.3 Value of Zara in Taiwan

“Zara doesn’t make people wait for new clothes to come. It’s this continuous introduction of new clothes what attracts the general public.” Alba

“People dress Zara because of the way others perceive the brand -a highly valued one.” Vanessa

August emphasizes the details of the designs in Zara: “From the outside you can see a usual piece of T-shirt, but if you look deeper, you find one sleeve with flounces. And this is exactly the kind of details that make Zara’s clothes so attractive.” In her opinion, Zara allows itself to sell at such prices because of the designs they produce. She explains: “With one sole pattern, Zara re-uses it by doing “new” models with different fabrics and colors, i.e. designers will try to make the most of that pattern, especially, if it is a successful pattern.” Jojo agrees with August. She illustrates her experience with Zara in the beginning, when it arrived in Taiwan (she did not know the brand before). She was shocked by the prices:

> I just couldn’t understand why Zara was selling at such expensive prices. I remember two years ago, I saw a piece of basics in night markets sold at 150 NTD, and a similar one in Zara 790 NTD or 990 NTD. How come such a big difference? But then I realized that “the similar one” had some special design (the pattern wasn’t totally straight), it had indeed a couple of details that the one in night markets lacked. This is the reason why I eventually bought the one in Zara.

She justifies this purchase because she gives importance to the way she dresses herself. She pays more attention to the design and details of the clothes, not just simply the appearance and functionality of the clothes. She adds, “Because dress and clothing represent yourself. I don’t want to dress randomly (因為穿著代表你自己，不想隨便).” From their statements, we can see that for Jojo and August, the value of the brand lies on the details of the items, and how they would evaluate purchasing Zara over models from other brands.

However, for Rachel, the value of Zara is, instead, the rapid turnover of collections: “Every time I visit a Zara store, and see new items, it just makes me happy and makes me want to buy them.” Asking her whether she would buy immediately the items she likes, she nods and explains:

> If I don’t buy what I like at that precise moment, it gets sold later very quickly. The only solution is to wait until the sales come out. But when it’s sales period, then you can’t find your size. But obviously I would still check the price first before jumping into the purchase.

From Rachel’s comment we can verify how the factor of rapid turnover in collections that Zara strongly promotes is well valued in Taiwan. Similarly, Alba believes that the variety of styles is thanks precisely to such rapid turnover of collections. “People won’t see that the clothes for the spring season during the whole three months remain the same; Zara doesn’t make people wait for new clothes to come. It’s this continuous introduction of new clothes what attracts the general public.” In contrast to Alba, as we mentioned before, for August, the reason behind the variety of styles is the re-use of a sole pattern. Nevertheless, this variety of styles is what lets Valeria and Laura consider that the value of Zara in Taiwan is the convenience of clothes combinations: “Zara suits my clothing style,” says Laura.

Vanessa believes that the value lies on the brand itself: “People dress Zara because of the way others perceive the brand -a highly valued one.” Vanessa’s opinion implies that it’s mainly about the popularity of the brand and its impression it gives to the general public. Some people, without being asked, would say on purpose “I’m wearing Zara clothes!” or “I’ve been to Zara today.”

Alice and Joanne believe that the value of Zara lies on the fair price. We suppose that it’s because they have full-time jobs and with their monthly spending in clothes they can afford more choices. And among all the clothing brands established in Taiwan, Zara is considered to offer a fair price. Joanne adds that Zara is fashionable, while Alice considers the fabrics' quality as good. Alba points out the price, "If we compare similar models with other brands, I think that Zara is cheaper, affordable and acceptable." However, she says, "Although I still think that the quality and the price don't match." As we mentioned before, Zara is still considered expensive for Taiwanese standards.

We can now summarize the main five values of Zara in Taiwan found in the statements of our interviewees: The details, the rapid turnover of collections, the variety of styles, the popularity of the brand, and the fair price. Precisely these are the values that make Zara attractive to Taiwanese fashion consumers.

4.1.4 Position of Zara among other brands in Taiwan

> ***"****Zara in terms of functionality, I would put Zara together with Chanel, Louis Vuitton. Others like Uniqlo, Benetton would be at the opposite end."* Jojo
>
> *"(In terms of price) Zara is positioned in the middle of luxury brands and other retailers like Uniqlo."* Jojo

> Zara can be positioned differently. For example, Uniqlo and Benetton promote leisure clothing, I mean, they don't belong to the general concept of trendy, fashionable. In my opinion, their priority is comfort and clothes are not beautiful. And, as I said before, Zara's shoes are not comfortable but they look beautiful. So if we position Zara in terms of functionality, I would put Zara together with Chanel, Louis Vuitton.

> Others like Uniqlo, Benetton would be at the opposite end.

Jojo even adds what her French teacher used to say: “fashion is not about comfortable”. She thinks that this happens in the case of Zara, especially shoes: “shoes are not comfortable but they look very beautiful. But, with the same amount of money, you can buy comfortable shoes, but they may not be beautiful or fashionable.”

So, in terms of functionality, she positions Zara along with big luxury brands, although their business models and concepts are totally different. However, in terms of price, she says:

> It’s obvious that Zara is positioned in the middle of luxury brands and other retailers like Uniqlo. Since we are students, we can’t afford Chanel or Louis Vuitton, but Zara happens to be the affordable solution: when I dress Zara clothes, it gives me the feeling that I’m into or close to fashion.

Zara is known for offering affordable prices, and similar to other retailers in Taiwan, i.e. Uniqlo or Net. But it is very interesting how she sets Zara outside of these competitors’ list.

On the other hand, observing Zara and Mango at the same time, Rachel thinks: “although they are similar, I feel that Mango is still more addressed to office ladies. And that’s not the style I look for.” (Rachel is a student at the Department of English who visited twice this past month). Zara and Mango come from the same country but promote different fashion styles. Although Taiwanese have been very familiar with Mango all these years, the overall feeling is that Zara seems to be more preferable among some fashion consumers, like Rachel.

According to the rest of the interviewees, five of them considered Uniqlo as a brand with a more fair price (大眾或平價), while four thought of H&M (although it is not present currently in Taiwan). On the other hand, regarding the brands considered as more expensive or luxurious (昂貴或高級), there is a variety of responses, such as Burberry, Abercrombie & Fitch, Louis Vuitton and Chanel (all of them mentioned only once).

4.1.5 Impacts of Zara on the consumer

"My contact with Spanish culture and films was long before (I knew about) Zara." August

"What I'm interested about Zara is their business philosophy and strategy." Joanne

"I would want to travel to Spain," says Louise, who visited Zara three times in the past month. According to her, Zara does not make any special impact on her and the only thing she would think of is just visiting Spain. Similarly, Vanessa says, "I don't pay any special attention to Zara." Both of them are our interviewees who do not make any purchase in Zara stores in Taiwan, because they state that the style in Zara do not suit them. Vanessa also explained, Zara is more suitable for workplace and job interviews, hence, the day she applies for some job, she may consider dressing Zara.

Other interviewees are also interested to visit Spain but rather for more precise reasons. "I don't think Zara has made any impact on me. Perhaps, I would want to go to Spain to buy Zara items, because they are cheaper in Spain," says Rachel. As well, Alba agrees with her:

> Since I've seen the surrounding phenomenon of Zara here in Taiwan, I'm very curious about the quality and styles of the clothes in Zara

> locally, in Spain. But above all, I want to check the prices, because it must be much cheaper there. When Zara arrived in Taiwan, I was actually disappointed about the quality of the clothes, because I expected better quality. After several visits, I didn't quite know what to select because there wasn't any item whose quality I could be satisfied with. If we compare the quality of Zara clothes with Uniqlo, Uniqlo clothes are more durable (耐穿) but anyway, Zara and Uniqlo offer different concepts and styles.

Alba also adds that she would search a bit about the background of Zara: "I even remember that once I read an extensive report introducing Zara in the magazine Global Views Monthly published in 2006." Similarly, Laura was also interested in knowing more about Zara: "In the beginning, when I did not quite know about this brand, every time I saw in a magazine an article introducing Zara, I would stop by and read it." Laura, who currently lives in Chiayi city, lived before in Zhonghe area (中和區), used to visit a Zara store in her free time, and because of the convenience of the MRT transport. Laura adds, that Zara also makes her like Spanish culture: "It makes me want to travel to Spain or eat Spanish food."

However, Alba, who also attends a flamenco student club and learns Spanish in a language center in Taipei, states that she doesn't think that her interest towards the Spanish culture is connected to Zara. "Before, when Zara was not in Taiwan yet, I used to browse through the online catalogues and I would just think of it as just another clothing company."

Our fashion consumer August affirms that indeed, "if you like Zara, you would want to do some research about the brand." And like Alba, her interest in Spanish culture has no direct relation with Zara: "My contact with Spanish culture and films was long before (I knew about) Zara. When I watched the 1992 Barcelona Olympics, my interest towards Zara started to grow.” Similarly, Alice, who works at a shipping company, is also aware that Zara comes from Spain, “because when I was in Spain I bought a lot of clothes in Zara.” But she says that this is the only thing she knows about Zara, as she is not interested in doing any further research concerning its background. She also affirms that she originally already likes Spanish culture, food and films, “though it’s not because of Zara, so there is no direct impact.”

Joanne, who works in international trade, also thinks that the connection between Zara and Spanish culture is not very obvious. “What I’m interested about Zara is their business philosophy and strategy.” She also explains that Zara does not highlight its country of origin or any Spanishness and compares this fact with Mango:

> Instead, it’s Mango that feels more like Spanish style. Mango has also invited Penélope Cruz, that sort of Spanish stars as spokesperson, but my impression is that Zara doesn’t have any spokesperson. Zara hardly seems to emphasize it’s a Spanish brand. Zara in Taiwan is registered as “Dutch Trade”, so in terms of business registration, Zara is registered as a Dutch company in Taiwan.

As we read in Chapter 3, the maxim of Zara is to promote a global fashion, and we have observed that Zara does not clearly point out its country of origin. According to author Martínez (2012, p.99), Zara has embraced since its beginnings a shared fashion culture. Zara has positioned itself as a global brand but adapted for each country and city in which it opens a store. It’s traditionally believed that the country-of-origin effect of a brand enhances the position of the brand internationally, for example, Chanel as French, Uniqlo as Japanese or Abercrombie&Fitch as American, because consumers associate the qualities of the fashion brand with the perceptions they have of the country in particular. In contrast, Zara gives rather the perception of a 'global image', instead of a 'Made in Spain' image. And precisely, it's this positioning strategy that has contributed to Zara's image, not only in Taiwan but also in the rest of the world.

Three interviewees have been to Spain before and among them, Joanne comments that she first knew about Zara when she traveled to Spain in 2003:

> Before, when I visited Spain, Portugal and Canada, I could buy clothes 'Made in Spain', and in Japan I also saw items 'Made in Spain'. However lately these years in Taiwan and in Hong Kong most labels are printed as 'Made in China'.

From her statement we can verify that the production label tag may have some kind of impact with the perception of the brand as coming from Spain. However, as she pointed out before, Zara is not directly connected with Spanish culture. And from our observation, Zara indeed does not promote a Spanish fashion or Spanish image. Nonetheless, what specially concerns Joanne are the negative news surrounding Zara: "Recently a lot of news related to Zara's sweatshops and toxic chemicals in their clothes make me worry!" Joanne even provided me four links about such news published in Taiwanese media (CTS, TVBS and Apple Daily), in which the country of origin is emphasized by starting the articles with "Spanish clothing retailer Zara" (西班牙平價服飾ZARA). Even one article that doesn't report about Zara, but about the recent news related to clothing factories in Bangladesh, the title though includes Zara: "Sweatshops who produce clothes for GAP and Zara" (幫GAP、ZARA製衣 孟加拉「血汗工廠」). Therefore, although Zara does not highlight the country of origin, Taiwanese media ‘do it’ on their behalf.

On the other hand, Vicky, who worked for some months at the Zara store in Kaohsiung city, says that she doesn’t have any special interest in Spanish culture or anything related to Spain. “I would read more about the background of the brand.” She says has downloaded Zara’s app on her phone: “I check it once every two weeks, to know if there is any new item, it’s like catalogue.”

As we observe in our interviewees’ opinions, Zara has little impact in their perception of Spanish culture, since Zara does not highlight its country of origin, instead, the image of a global fashion. Their interest towards Spain is not directly connected with Zara. They clearly separate the Spanish culture from the Zara culture. Once they know Zara comes from Spain, the only thing that may make them want to travel to Spain is to check there the prices of the Zara items, because they assume it’s cheaper than in Taiwan, as Spain is the ‘local’ store.

4.1.6 Impact of Zara on the consumer’s daily life

“If I haven’t bought any clothes for a while, I would think of visiting Zara.” Valeria

“My perspectives looking at clothes has been Zara-nized.” Joanne

“Yes, it does, because I often visit Zara, I feel I’m not used to it if I don’t go,” says Rachel, whose average visit frequency is twice a month. For her, visiting a Zara store has become a habit. And the same occurs to Valeria, who in the past month went twice to a Zara store. She even makes a comparison when going to Zara and Uniqlo:

> If I haven’t bought any clothes for a while, I would think of visiting

> Zara. I have the same mood going to both Zara and Uniqlo. The only small difference is that the style in Zara is richer and the price is slightly more expensive, so I feel more like visiting the store, while in Uniqlo I have already in mind what to buy, for example, a basic T-Shirt or a sport coat. I have already a clear target.

We can say that visiting a Zara store has become a habit in their clothing consumption behavior. They don't go to Zara stores with some specific item to buy, but just to look around and when they haven't shopped for a while.

Alba follows their Facebook page, and it impacts in her daily life when connecting to Facebook:

> No matter if I don't check it, because every time it's updated, it shows up on my news feed. And then I would check the Lookbook. Although I don't purchase, I want to see the combinations of the clothes or any particular style. Only if there were some kind of discount, I would consider of purchasing.

Alba visits a Zara store once a month on average and spends monthly below 990 NTD. She emphasizes she only considers purchasing in Zara when there are special deals. She is rather interested in the way the models of Lookbook combine the clothes and accessories.

On the other hand, Laura, who applied for an internship in Zara before but wasn't chosen in the end, affirms that Zara must have probably made an impact on her clothing style. "I also visit Zara stores with friends who like Zara." Laura goes to Zara once a month on average and spends monthly between 1,000 and 1,990 NTD in Zara. As well, Vicky agrees with Laura:

> From the collections of Zara I can know the key points of this season, and then I know clearly what to dress. When I am walking around in the night market, and if I choose any model, the style of Zara would be present in my mind.

Joanne believes that to some extent, Zara has made an impact in her daily life: "When Zara was not in Taiwan yet, every time I go abroad, I would go to the local Zara stores to purchase, so the impact should be on my purchasing behavior." And since she purchases items in Zara, she notices that regarding aesthetics, Zara has indeed influenced her: "My perspectives looking at clothes has been Zara-nized."

We can observe how Zara has made an impact in the clothing consumption behavior of Vicky and Joanne, and along with Laura, also in their respective clothing styles. Every time they window-shop or have intentions to purchase clothes or accessories, their selections are influenced by the style of Zara and by their previous experiences with Zara items.

Nonetheless, for Alice, who has a monthly spending in Zara between 2,000 and 2,990 NTD affirms, "Zara has not made any impact on my daily life." Similarly, Vanessa and Louise, who don't purchase in Zara, also believe so.

From our interviewees' statements, we understand that there is no connection between purchasing in Zara and the possible impact of the brand in our daily life. The impact can come from the visits to the stores, the Lookbook and newsletters. However, there is a significant impact from the styles and clothes combinations they have observed from Zara, as they apply it or simulate for their own fashion style.

4.1.7 Reason of Zara's popularity in Taiwan

"Because the price is not very expensive, and the clothes are not very easy to become old fashioned." Alice

"Zara is more popular in the central and northern part of Taiwan." Vicky

This 'basic' question refers to the initial motivations of our study. We want to know how Taiwanese Zara fashion consumers perceive the existent or non-existent popularity of the brand in Taiwan. We want to know what are the factors.

Rachel and Alba compare the popularity of the first months when Zara arrived in Taiwan and the situation now. According to Rachel, "in the beginning Zara was very popular because it's famous. Of course it's still very popular! Besides, in comparison with other famous brands the price in Zara is cheaper!" We can observe that the initial popularity of the brand comes from the overall reputation that Zara has achieved abroad. Whereas Alba describes two situations she thinks it's hard to understand:

> The first time I went to a Zara store in Taiwan was during the first days of its opening (November 2011). I accompanied a friend. There was a crowd and entrance was limited every certain period of time. But just this past month (April 2013), I went to the Zara in Dongqu area 東區 during the weekend, and to my surprise it was full of people queuing at the entrance. I was shocked and wondered "hasn't Zara been established here for a long time already? How come such a scene can occur again?"

Alba believes and clarifies that actually the popularity of Zara is not because it's Zara, but because it's a foreign brand: "Most people would visit the Zara store and/or buy (大家會一窩蜂地去購買或逛), still until today, long after the opening day. I think this is a habit in Taiwan." She believes that although prices are considered expensive here, people still buy because it's a foreign brand. She adds, "I guess people like to show off and say I've been to Zara today!"

In contrast to what Rachel thinks of the prices in Zara "in comparison to other brands, it's cheaper", Alba considers the prices in Zara are indeed expensive, and people mainly purchase Zara or go to Zara just because of the foreign reputation. On the other hand, Alice disagrees slightly with Alba's opinion: "There are many foreign brands in Taiwan, so I don't think it's a matter of foreign reputation or "revere foreign" (崇洋媚外)."Alice justifies the popularity of the brand as followed: "because the price is not very expensive, and the clothes are not very easy to become old fashioned." Exactly what Zara promotes: fashion at affordable prices. Similarly, Valeria explains that the popularity of the brand comes from two key points in Zara's business model, the rapid turnover of collections at affordable price:

> Because in Taiwan there is no other European brand with such qualities: fast and with a fair price. Besides, Zara covers several age strata, there are many collections addressed to different age strata of consumers; for example, Mango can't do this.

As well as Valeria, Joanne believes that Zara sells at fair prices:

> The concept of 'fair price fashion' in Taiwan is very popular. After all, the economy has a slowdown, but people still think of dressing bright

and beautiful. Furthermore the price in Taiwan is settled with sincerity, it's cheaper than in Hong Kong and Japan. Hence, good sales are inevitable.

Joanne further illustrates the possible Taiwanese consumer profile of Zara: "I think Zara in Taiwan is considered to be popular, but maybe only among people aged 20-40, and probably among female consumers. But I have many friends who buy clothes in the kid section for their children."

However, what we have read until now are opinions from consumers who are more familiar to the Zara stores in Taipei and the fashion style in Taipei. Vicky, who lives in Kaohsiung city and worked for some months in the Zara store there, goes to Taipei from time to time. She believes that the so-called popularity does not apply for the rest of Taiwan:

> I think that Zara is more popular in the central and northern part of Taiwan. The sales of Zara in Kaohsiung are not as good as in Taipei. When I go to Taipei, I go to the Zara in Dongqu. I've found out that there are more models in Taipei than in Kaohsiung. As far as I know, there are no jackets in the man section in Kaohsiung.

In contrast to the comments above, Laura, a master student of Telecommunications, is not sure whether Zara is popular or not in Taiwan, especially among those consumers who haven't heard about Zara before it arrived here:

> I think that if one likes or pays attention to Zara, is probably in love with it or have a better understanding towards the brand. That consumer frequently checks new items or conveniently passes by the Zara store when he or she hangs out. And usually, the majority of such consumers

> know about Zara because they have been abroad, or purchase clothes with brands, or they are fashion followers. But, regarding to those Taiwanese who have known Zara for the first time, since it came in Taipei 101, maybe they find Zara as just ok, or maybe think prices are still expensive. Zara has been in Taiwan for just one or two years, like for example most of my acquaintances, they haven't quite got to know the brand, hence Zara is not popular for them.

From our interviewees' statements we can observe that the main reason is the reputation the brand has achieved abroad, especially in other countries, not just locally in Spain. As well, we must point out that the concepts of rapid collections turnovers and fair price are strongly perceived by the consumers. And as Vicky pointed out, such popularity may differ across the country, as the fashion-awareness is mostly concentrated in the capital of Taipei. However, as Laura explained, Zara has not been here for long (less than two years), hence we can consider it may be still early to evaluate the popularity of the brand in Taiwan. We also noticed that the quality of the clothes in Zara hasn't been even mentioned as part of the popularity of the brand. Nevertheless, this question needs to be under further research.

Veblen's analytical framework about conspicuous consumption, states that individuals want to impress others and demonstrate their purchasing power through consumption. Individuals acquire goods to compete with each other, as if they were saying, "who is more fashionable than me?" Although such concept was valid for pre-consumerist societies, Bourdieu proved it is also possible in consumerist societies, even if the strict class distinctions are removed. If we observe the Taiwanese consumerist society through our interviewees' statements, the concept of fashion does not stick to a social hierarchy. Thus the trickle-down theory doesn't have any effect in our research. As Spencer explained, fashion is intrinsically imitative. And this describes exactly the situation in Taiwan, but as we have verified, it's not about competing with each other or exposing their economic power by consuming in Zara, instead, their consumption or window-shopping in Zara responds to a wish to be in fashion, to express their own style. Through our interviewees, we have learned that they are more concerned with the designs of the clothes, rather than with the brand itself. Their interest in the brand is related to the variety of styles they find, though not with the quality of clothes, which they consider is not as good as expected from a foreign brand that has achieved global reputation. We observe that for them, the combination of clothes is more important, as it serves them to construct their own style, hence, to express their own identity. Indeed, fashion is seen in Taiwan as social phenomenon, in the sense that consumers interact with each other by expressing their own style, in order to look different from the rest, but still within the boundaries of what's considered fashionable. And how do they know what's fashionable? By doing the 'fashion research' in the stores in alleys, night markets, as well as online clothing stores and fashion magazines. Thus, the fashion phenomenon in Taiwan is not about economic or social status, but rather about clothing styles.

4.2 A field trip with a fashion consumer

As we said above in the introduction of Chapter 4, we include a field trip with a fashion consumer, August. The location for our field trip is the Zara store of Dongqu, in eastern downtown Taipei. It is the second store Zara opened in Taiwan (24th November 2011). With two MRT stations, Dongqu is a shopping district with stylish brand names (local and foreign) and local designer stores, nice cafés and restaurants, apart from shopping malls, such as Sogo. The choice of this particular Zara store is due to the significance of Dongqu for Taiwanese fashion followers and consumers, and in general, a very popular place to hang out in for youngsters and adults. According to Alba, a part-time student, "numerous pricey but at the same time stylish stores are gathered in this area. When one looks for fashion, Dongqu is the first thing that comes to mind." On the other hand, Vanessa, who enjoys checking Zara stores but does not purchase, says "in this area consumers can find cheap and pricey things at the same time."

For our research, I have had the opportunity to spend one afternoon (on a Thursday, from 2pm to 7pm) in the Zara store in Dongqu, with a fashion consumer, August, aged between 28 and 32. She confesses she is a trends follower, partly because of her job as an interior designer, and at the same time, she extends this passion to fashion. She likes to observe what people dress, but more importantly, to 'how'. Apart from checking retailers and little shops in the alleys of Dongqu, she also browses fashion magazines (both local and foreign) and online clothing websites, such as i-miusa.com and joyce-shop.com. Every three or six months she changes once her preferred online clothing website. The first time she visited a Zara store was in Paris. And now, she visits a Zara store three times a month. We started walking through the woman section. Indeed, she was very familiar to the items and the concept of Zara:

> To ease the shopping of the consumers, Zara places items according to a recommended combination of clothes and colors. For instance, we see here pieces of basics (plain T-Shirts), and in four colors. Among them, this pair of blue trousers that suggests you to combine with any color of

> those T-shirts. Items are smartly placed so that you neither get confused nor think much about how to match.

At my question whether Zara forces consumers to dress like the suggested combinations, she explains that Zara doesn't pretend to make them buy the whole combination, but saying that such items are convenient and beautiful to match: "No matter how, Zara will make you purchase at least one of the items exposed."

We examine the woman section. Clothes for office ladies and every day are placed in different parts but close to each other, while clothes with 'more daring' styles or rather addressed for particular occasions were placed bit away from the rest. She also pointed out that every piece had only one or two sizes placed, in order to avoid giving the impression of a mass or a mess of clothes all put together. As we spot three different bags on the shelves above the clothes, she comments:

> These are usually the bags that are more difficult to be sold, because they are considered to have a higher level of quality, plus the appearance looks similar to those of luxury brands. However, if you just purchase its look, you always save more money buying this rather than a luxury bag.

Then we walked downstairs, to the kids section and passing by the TRF (Trafaluc) section. Something got my attention: the mannequins in both window displays. There were three mannequins put in a row and with the same combinations of clothes. She explained: "Such repetition of mannequins say that it's a good combination. It's not about exploding the combination or making a pressure on the consumer, but functioning as a reminder: this combination works really well."

In the kids section we found women with a physical appearance of 16 to 28 years old. She explained that there is a very popular and common habit among female fashion consumers: “According to the usual Taiwanese woman’s physical measurements, we can perfectly fit in some of the kids’ clothes. And this happens with other brands. When we go abroad, we do check the kid sections!”

The TRF section offers a more casual collection and addressed to young women, who practice leisure activities. Here, August perceives the items to have lower prices compared to the ones found in the woman section. Therefore, this section attracts those who can’t quite afford buying in woman section. Since it attracts lower-budget women (usually high school and university students), the style here is more colorful or ‘more daring’, the pieces have more colors to choose and there are less formal clothes. She emphasizes the following point:

> There are models here in TRF that are quite similar to those upstairs in woman section. Zara uses the same pattern for many models. Therefore, to make the most of that pattern, they use different fabrics, materials and colors, or adding details, so then they can make models for both TRF and woman sections at the same time. Also, the models in TRF are slightly cheaper than those in woman section.

Zara promotes a mass fashion; so we wonder what do Taiwanese women who wear Zara, feel about the “uniqueness” of their dress. August responds as followed:

> It depends on how you combine with other clothes from little stores in the alleys or in the night markets. Usually, that’s what the Taiwanese woman aged 18 – 30 does. She’s aware of the fashion trends. There are lots of Taiwanese blogs about fashion that suggest multiple

combinations and styles. We also get the inspiration from them and then we choose our own combination that suits us. We create our own style.

We continue our observation in the man section. As we saw from the formal dresses, they indeed followed a same pattern. We compared two pieces: From the outside there were no much difference (same pattern), but as we observed inside, between them we spotted different details, such as, flower lines, colors, buttons, soft or harder fabrics, pockets and cuts. "This is exactly where the value of this piece lies: the details. Details make you buy this or that piece." However, a question arises here: What if others can't see these details? She responds: "It's 'me' who wears this piece, it's 'me' who is aware of these details, that's enough. She explains this 'feeling' with the phrase (這是我爽的程度). Buying clothes should be to make oneself happy."

Afterwards, we entered different stores in the alleys behind Zara. She says that many of them originally come from online clothing websites that later reached a considerable development, so now they decide to rent a local. "It's always better to enter the shop and touch the clothes, rather than simply clicking on the computer." She continues explaining: "The clothes are mostly imported from Korea directly by the shops' owners themselves." All the stores we checked were unique in style: none had the same in decoration; instead, some clothes happen to coincide. From our observation, we understand why window-shopping such stores is so popular among fashion consumers: they can buy here and there, combine with accessories, and create their own style. It's very popular now to combine clothes from a stylish brand name, for example Zara, then something purchased in a night market and another piece from a clothing store in the alleys. The following phrase summarizes very well how the current fashion consumer is behaving: "In order to be fashionable, one has to be smart in combining fashion (時髦還要聰明混搭出時尚)" (Magazine Global Views Monthly, special issue published in December 2011).

Regarding to her 'love' over Zara, she concludes: "No matter how, I frequently find what I like in Zara. I like this pattern, but I don't like it with this particular fabric, it's alright, because then I may find a similar pattern or the same one, but with the fabric I want." For August, the main value of Zara lies on the details. Details are the reason why she loves coming to Zara; and when she can, also purchasing Zara items.

Related to the prices, she believes that although Zara is known as a retailer, prices in Zara are still high:

> A pair of shoes that cost 990 NTD is seen expensive in Taiwan. On the other hand, if compared to luxury brands such as Louis Vuitton, Zara is not seen as a big brand. But, for the affordable pockets of the general public, Zara is indeed seen as a big brand and very popular in Taiwan.

As we read before, Zara is known to offer affordable luxury: products with a luxurious look but not expensive (高貴而不貴). However, for Taiwanese standards, the price in Zara is still considered a bit expensive. Despite this perception, and as we observe from August' statement, it's always cheaper to buy in Zara than a luxury brand.

The interest towards Zara started to grow in August when she first watched the 1992 Barcelona Olympics. Though for her, there is no direct connection between the brand and Spain. "Zara does not highlight any Spanish-ness". August believes that the fashion phenomenon around Zara in Taiwan may remain for long, because the variety of styles is never ending and the rapid turnover of collections attracts fashion followers all the time. We can conclude from August's observations, that Zara is not only popular among Taiwanese fashion consumers because people can usually find what they like ("I like the pattern but with a different fabric. It's alright, you can find your preferred fabric with the pattern you like!"), but mainly because, without the necessity to purchase, customers learn how to combine clothes and accessories. They know what's the fashionable combination of the current moment (not just simply the season), in order to create their own clothing style. "Be different, but still, into fashion wave".

4.3 Interviews with Zara store assistants

During the search of Zara store assistants to interview, I personally visited the stores but the attempt was unsuccessful. Eventually, through friends, I got the great chance to contact two store assistants who accepted to be interviewed via mobile phone. One works at Zara Kaohsiung and a second one at Taipei 101. Both interviews were conducted in Chinese. From now on, the first one is referred as assistant A and the second one as assistant B:

1) I would like to understand the profile of the Taiwanese consumer in Zara. In Taiwan there are currently five stores, and the profile is varied. Could you please describe this profile?

According to assistant A, "to illustrate the profile of the consumer of Zara in Taiwan is difficult, as it depends on which area of Taiwan, location of the store and section (man, woman, TRF, kids)." Assistant A also describes about the situation in Kaohsiung:

> In Kaohsiung, for example the consumer is mostly from Kaohsiung, nearby towns and provinces, generally speaking, from the south of the country. Regarding to the location of the store, we can say that we have also a small percentage of tourists who come to visit the south.

> Regarding to the section of clothes, for instance, in TRF the age of the consumer ranges between 20 and 30. There are also maybe consumers aged between 17 and 18, but in a smaller percentage.

Similarly, assistant B comments that “the customers who go to Taipei 101 are mostly tourists: half of them from Mainland China, and the rest are European or Americans.” This is reasonable due to the touristic spot of the second highest building in the world. In contrast, “the Zara in Dongqu is more addressed to Taiwanese customers and mostly women aged between 20 and 30, because it’s the area for local shopping and a popular place to hang out.”

2) I would like to reaffirm the fact that Zara store managers report every day to the headquarters in Arteixo. Afterwards, it would be interesting to see if these reports reflect later in further collections in Zara Taiwan, as well as other Zara stores around the world.

Assistant B confirms that they make reports, statistics and records everyday. And assistant A adds, “we not only report to Arteixo, at the same time, we send the reports to the headquarters in Taiwan, located in Taipei.” Regarding the models designs in Zara Taiwan, according to assistant B “in the end, the designs of the clothes follow the European-American style.” On the other hand, assistant A says that, “the number of the pieces may vary depending on the colors. Those colors that are very welcome by the customers may increase in quantity. As well, the quantity of sizes of each model depends on the purchase of the customers. Hence, we will report all this to Arteixo and together we know how many items must be placed in store in the following days.”

Assistant B adds, “It is well known, among both costumers and the general public, that Zara has a rapid turnover of collections. We bring items (either restock on particular items or new models) twice a week, on Tuesdays and Fridays. Also, we usually introduce the new arrival of models to the customers."

Apart from the two questions above, I included a more personal one: "What are the reasons you think that Taiwanese consumers like Zara?" Assistant A responds as followed:

> Taiwanese like Zara because it is a brand that comes from abroad and they know it is a very successful brand worldwide. The image of an international brand attracts them. As well, the concept of mass fashion is very well accepted among Taiwanese consumers. More and more people like it, as it offers affordable prices to everyone. Taiwanese consumers can accept it (both the style and the price).

Regarding the Zara's popularity in Taiwan, this assistant agrees with what Zara customers told us before. Firstly, because Zara is a foreign brand that has achieved a reputation abroad; and secondly, because it offers affordable prices.

From our store assistants' responses we can observe that it's hard to describe the general consumer profile in the Zara stores in Taiwan, as each of the stores are addressed to different target consumers. For example, the one in Taipei 101 is focused rather on tourists and the one in Dongqu, on Taiwanese consumers.

The store assistants confirm that the everyday reports influence in the twice-a-week items introductions: both new and basics that need to be restocked. As for the question whether these reports influence in the designs of models, which are later imported to Taiwan and other stores in the world, we are unable to provide any information. However, we have watched the documentary *Planeta Zara* (Planet Zara), which was broadcast in Spanish Canal+, and coproduced with Sogecable and Capa LatAm in 2002. In the documentary, producers have had direct access to Inditex, store openings, and staff, from designers and architects, to manufacturers and store managers. Here, we have learned that against the general belief that consumers can find the same models in every Zara store they stepped in, it's not true. The majority of the models is identical everywhere, but a small percentage changes in each country to adapt to all cultures. Therefore, we suppose that the everyday reports that store managers send to Inditex headquarters both in Arteixo and Taiwan influence, indeed, in some models introduced in Taiwan.

Chapter 5. Conclusion

After we have analyzed the statements from customers, store assistants, as well as the fashion consumer during our field trip, we can conclude we have collected very interesting findings. We take a look back to the three research questions we presented at the beginning of the study:

1) Taiwanese consumers' perceptions towards the brand;
2) Underlying social and psychological motivations;
3) Awareness of gaining something more.

The main perceptions towards Zara in Taiwan coincide with what Zara promotes globally: fashionable, fast and affordable. Through the statements of our 11 individuals, we learn that they agree with the first two elements, which are reciprocal. Indeed, in order to keep up with fashion, Zara introduces new items or restocks basics twice a week, and our interviewees are well aware of that. Even two who don't purchase in Zara, confess they enjoy window-shopping, simply because they find the items fashionable. However, although Taiwanese consumers know that Zara is known to be affordable, for them, in terms of Taiwanese standards, especially when they compare with the prices in night markets, they find Zara expensive. Most of our interviewees have also noticed that the quality of the items is not as they expected as good. Therefore, there is a general confusion about Zara's "high prices". They state prices don't match the quality.

Despite this fact, we wonder about the social and psychological motivations that make them window-shopping and/or purchase in Zara. By quoting Spencer when he differentiates two types of imitations, competitive and reverential, we find none of this happens among Taiwanese consumers of Zara. It's known that Zara offers an affordable luxury, but these consumers don't take it as a way to imitate people who can afford luxury brands, instead, as a way to express their own fashion style. Another reason is because they find that all the clothes in night markets look very much the same, so they want to dress differently from others. As we mentioned before, "fashion is the expression of individual identity", and it's precisely the case of some Taiwanese consumers of Zara. We also learn that some consumers dress Zara not only to feel stylish, but because they are clothes from Zara, not just "clothes". Or simply, for their own enjoyment, as one interviewee said: "When I wear Zara clothes, I feel very happy." These statements are much related to symbolic consumption described by Dittmar, in the sense that the symbolic meanings of material possessions (Zara clothes) communicate aspects of the consumer's identity. It's very interesting to notice that both interviewees and Zara don't mention the functionality of the clothes; instead, the style is much more emphasized. After reviewing Baudrillard in Chapter 2, we observe here that clothes have achieved a symbolic value after purchase, and consumers use this symbolic value to express their own identity. However, Taiwanese consumers affirm they neither dress Zara to give themselves a sense of belonging or affinity with others, nor impress others by demonstrating purchasing power (conspicuous consumption). That feeling of being part of a "group" of Zara consumers is non-existent. Instead, it seems to be the contrary effect: differentiation from the rest.

We also point out another fact: Zara is a foreign brand. As one store assistant commented, "Taiwanese like Zara because it's a brand that comes from abroad and they know it is a very successful brand worldwide. The image of an international brand attracts them." In any case, the general perception is not because of its country of origin, but essentially because it's a foreign brand. We find interesting that Zara never highlights it comes from Spain. And this is reflected in our interviewees' perceptions, as they affirm they find no direct relation between Zara and Spain. Perhaps, only one thing some interviewees wish: to go to Spain because prices there may be cheaper than in Taiwan, as Spain is the home of Zara. Indeed, Zara has never used the country-of-origin effect; it rather promotes a brand with a 'global image', instead of a 'Made in Spain' image. Therefore, Taiwanese consumers are aware that Zara is a global brand that has achieved international reputation. That's what truly matters for Taiwanese consumers, and for the benefit of Zara itself. Hence, although it's common nowadays to relate Spain with the economic crisis, the image of Zara seems not to be affected, none of the interviewees have related the negative image of the Spanish crisis with Zara. In any case, since its beginnings, Zara has always followed a delocalization strategy, which has successfully worked not only in Taiwan, but in every country it has established.

On the other hand, the negative impact that Zara may receive in Taiwan is through the media coverage about the sweatshops and toxic chemicals in their clothes. Last year November, media reported about Greenpeace activists who protested in front of the Zara store in Dongqu. It was an international campaign to protest against the harmful chemicals contained in determined clothes of Zara. The coverage of such events may impact in the perceptions of the general public towards the brand. Nevertheless, only one interviewee pointed out she is concerned about such negative news.

We have observed that every weekend, Zara stores in Taipei are crowded. It's over a year and a half since Zara arrived in Taiwan, and still today, it looks as if in the first days. Taiwanese consumers are aware that every week there are new items in Zara. As Kawamura quoted Koenig before, "the ardent fashion followers can experience anxiety and desire when they are eager to own a certain unique fashion item," therefore, we wonder whether

Taiwanese consumers feel anxiety towards the constant newness in Zara. From the statements we learn that it's relative. We observe it isn't about anxiety to purchase, but rather about going to Zara often to check what's new, and to a general extent, what's new in fashion. Thus, the main motivation of their visits is to get ideas to combine their own clothes so they construct their own fashion style.

We also learn that the main thing our interviewees feel they gain from Zara, both as a brand and as a product, is the style. And not much what we believed in the beginning, that Zara would enhance, somehow, the social status of the consumers. Instead, most interviewees believe that Zara has made an impact in their clothing style. "My perspectives looking at clothes has been Zara-nized," said one of them. However, we have also perceived from the statements, that some people do say to others "I've been to Zara today", because they consider it as a significant activity, and according to one interviewee, such comment would be viewed as a way to show off. Nevertheless, as we observe, their awareness of gaining something more is more related to aesthetics, than to the social status.

As a conclusion, the popularity Zara here comes mainly from the international reputation it has achieved globally, and not simply because it's a foreign brand. Nevertheless, this popularity is still early to evaluate, as the establishment of the brand in Taiwan has not reached two years of life yet. Regardless the negative media coverage in Taiwan about the company, still, the social and fashion phenomenon seems to remain for long, as long as the turnover of collections keeps as fast as it has been since it arrived in Taiwan or even more, and the effective word-of-mouth "advertising" keeps spreading among fashion consumers. As we have learned that Taiwanese consumers consider Zara still expensive, their consumer behavior won't experience any significant change yet. Those who like something and can afford it will buy it right away. And those who like but can't afford it, they don't mind waiting; they will wait until the special deals period come.

Before the research, I was not aware of Zara's background. But now, I can say I admire what Zara has achieved worldwide: Zara has indeed broken the typical fashion concepts: trickle-down theory, seasonal collections, famous designers, fashion shows and traditional fashion advertising.

This research has also served me to prove that my first impressions of Taiwanese fashion consumption are wrong. I used to think that Zara customers blindly purchased due to a new 'fresh' wave of such a foreign brand. Through the interviewees' comments and my own observations in the Zara stores in Taiwan, I have realized that Taiwanese fashion consumer behavior is not about simple adoration towards a foreign brand, but truly about clothes and style identity.

5.1 Discussion

As our study analyzes the consumer behavior of Taiwanese in the Zara stores in Taiwan from a cultural perspective, it would be interesting here to look at the notion of circuit of culture. This is a tool of cultural analysis developed by Stuart Hall and his colleagues and proposed in their book *Doing Cultural Studies: The Story of the Sony Walkman*. We will apply it to explore and discuss about the cultural meaning of the fashion and social phenomenon of Zara in Taiwan. They argue that there are five major cultural processes: Representation, Identity, Production, Consumption and Regulation. All of them together constitute the circuit of culture.

Zara has become a part of fashion consumption culture, and to an extent, part of global culture. Zara has developed a distinct 'culture' of its own. And in Taiwan, meanings and social practices have been developed around Zara. As we have observed through our interviewees, the image of Zara in Taiwan is related to an affordable luxury, which is exactly the image the brand promotes across all over the world. When Taiwanese consumers think of the word 'Zara', the concept of fashion and affordable price come up immediately. Consumers have given a meaning to Zara. Therefore, Zara items are meaningful. Since meaning is intrinsic in the definition of culture, Zara is also cultural. Besides, Zara is connected to social practices, because Taiwanese consumers enjoy window-shopping in their free time, and it doesn't necessarily mean that it leads to purchase. However, the question now is: how do Taiwanese consumers know to provide that specific meaning to Zara? How has Zara achieved that particular meaning in Taiwan?

Zara has achieved a cultural meaning in Taiwan partly as a result of how it is represented. Representation, according to Hall and his colleagues is the practice of constructing meaning through the use of signs and language. And this is usually done through advertising. As we discussed before, Zara is known to do zero advertising. They claim that the only advertising they practice is through the stores location, decoration and window displays. Therefore, without the conventional system of representation (advertisement), how does Zara create an identity in the consumers?

Zara products reflect a global fashion image, and through our interviews, we have learned that consumers do not have a special feeling or identity towards the brand Zara itself, since their motivation is rather related to the combination of clothes, and the details in Zara clothes they don't find in other brands, especially stores in night markets and alleys. As they find a variety of styles in Zara products, they can achieve their own goal: look different from the rest, but still, be in fashion. As we move further with production and consumption, we now take into account the everyday reports and records sent by Zara store managers to the headquarters in Arteixo and in Taiwan. We concluded in Chapter 4 that the twice-a-week introduction of new items in Taiwan is indeed influenced by the everyday reports. As well, we found out that the majority of the models are identical in every Zara store in the world, but still, there is a small percentage that changes to adapt locally. And this is not limited to a same country. As we learned from our interviewee who lives in Kaohsiung, that some models are imported in Taipei but not in the south. This verifies that the production in Zara depends on the consumption behavior. The introduction of items is adapted locally and even varies from one store to another within the same country. Hence, the cultural processes of production and consumption are reciprocal.

Finally, related to the regulation process, we can mention the media coverage regarding protests against toxic chemicals in clothes and condemns against inhuman sweatshops. Consequently, all this is being covered in the media, not only in Taiwan but also in countries, in which protests and campaigns have taken place. From our perspective, it's difficult for a global brand like Zara to have a control over such news. However, as we have observed, these facts have not influenced the perceptions of Taiwanese consumers towards Zara or its clothes. Not yet.

On the other hand, Spanish consumers seem to be much more concerned now about all these news. Social media, like Facebook, and NGOs run campaigns to pursue "clean clothes" and fight for human rights, as well as publish reports concerning to clothing brands, not only Zara, but also Mango, H&M, among others. I have observed during my time in Spain, that consumers don't perceive Zara as an affordable luxury, it's considered as 'just another clothing store'. Comments such as "that Zara T-shirt won't last long" or "you buy in Zara just because you need some clothes quickly" are very common in Spain. However, the opinion about the quality of the clothes is also shared with our Taiwanese interviewees. Nevertheless, it's certainly because Zara has been established much longer in Spain than in Taiwan, therefore, the freshness of a foreign brand and its consequent social and fashion phenomenon in Taiwan is comprehensible.

From my perspective, it might be even harder to illustrate a customer profile of Zara in Spain, since persons of all ages visit Zara stores (whether they purchase or not is another issue). But this is what it surprised me in the beginning when I visited Zara stores in Taipei: overcrowded. And it still shocks me nowadays during the weekends. From our observations, it seems that in Taiwan, and especially in Taipei, it's usually Taiwanese youngsters aged between 20 and 30 who are the most common customers, whereas in Spain individuals aged approximately between 14 and 60 visit the stores. It's curious to see such a difference.

Therefore, we think that this social and fashion phenomenon around Zara in Taiwan will remain for long, since its establishment is still recent. Maybe the arrival of another European brand would influence later in the perceptions of the Taiwanese consumers towards Zara and its clothes. In that case, it would be very interesting to evaluate the popularity of Zara, in comparison with the new European competitor.

5.2 Limitations of study

Initially we proposed to interview Zara store managers, in order to collect more insights about the brand in Taiwan and its customers. After unsuccessful attempts in the stores, we contacted with the Spanish Chamber of Commerce in Taipei. They kindly offered me the chance to send them my request, so they could forward it to the representatives of Zara in Taiwan. Unfortunately, it was not possible to have a meeting with any store manager. The response from Zara Taiwan is reproduced as followed:

> First of all, we would like to thank you for your interest in our organization.
>
> We deeply regret that we cannot answer individually all the information requests from schools, universities and professionals regarding our company business model.
>
> Please visit our website www.inditex.com where you will find all the available and updated corporate information regarding our company.
>
> Yours faithfully.

However, we have had the great opportunity to conduct phone interviews with two Zara store assistants. They have provided us useful insights for our research, as well as the 11 individuals who accepted to be interviewed.

As we commented previously, we have not come up with the customer profile of Zara in Taiwan. Hence, our research has not covered a broader age strata. On the other hand, we haven't focused on a specific Zara store in Taiwan, since the perceptions of the customers we have interviewed, have shown us, this is not relevant for our research. However, we also point out the time limitation. Zara has not been established in Taiwan for so long, as it has not even reached two years life yet. As one of our interviewees said, it's still early to evaluate the popularity of Zara in Taiwan. Nevertheless, it is very interesting to observe how the first days of popularity haven't changed much until today.

5.3 Further research

Due to the limitations mentioned in the previous section, I believe that my study may conduct a further research. As I have studied the early stages of Zara's popularity in Taiwan, and among female consumers aged between 20 and 30. Contrary to my expectations and perceptions of the Zara phenomenon in Taiwan, I have learned from our interviewees' statements, that the main factor of its popularity is the variety of styles, rather than just certain adoration towards a foreign brand. Nevertheless, I have perceived the Zara phenomenon in Taiwan to be still quite obvious even some time after its first days. Hence, it would be interesting to study the phenomenon when more Zara stores are open throughout the country, so it becomes a more common store. And then, observe whether the perception towards Zara and the clothes have changed for their customers, whether, some day, they consider Zara as 'just another clothing store'.

As we have interviewed 'only' 11 females, this research could further increase the target audience, so we can collect a broader variety of impressions. As we haven't specified any Zara store to focus in, it would be interesting to compare the customers' perceptions among the five stores (until now) in Taiwan, because as we mentioned before, even across the same country, models may vary, for example, the stores in Taipei from the store in Kaohsiung. For example, a further study would include interviewing customers from Taipei 101, because they are mainly non-Taiwanese visitors, whether they go especially to the Zara store in Taipei 101, in case they find some particular item they haven't seen abroad, or, just because they like checking what's new in Zara. In either way, the Zara phenomenon from Taiwan would be spread in their home countries.

As well, there are rumors about the arrival of European brand H&M, and American brand

Abercrombie & Fitch in Taiwan. Hence, it would be interesting to do a comparison of customers' perceptions, from a cultural perspective, with Zara and any of these brands, if they arrive here some day.

Appendices

Appendix 1: Sales contribution of each of the eight chain stores, to the total sales of Inditex Group.

annual report 2011

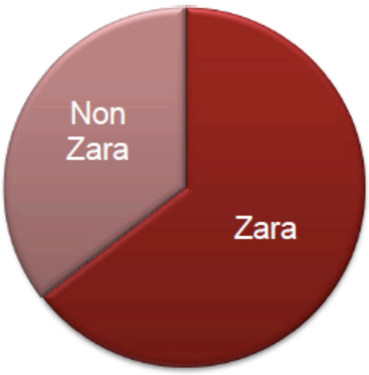
Sales contribution by format

64.8% ZARA	9.5% Bershka
7.3% Massimo Dutti	6.9% PULL&BEAR
6.3% Stradivarius	2.3% OYSHO
2.3% ZARA HOME	0.5% UTERQÜE

Appendix 2: Comparison of sales percentages between Zara stores and the sum of the other seven brands (Non Zara), during the financial years of 2011 and 2012.

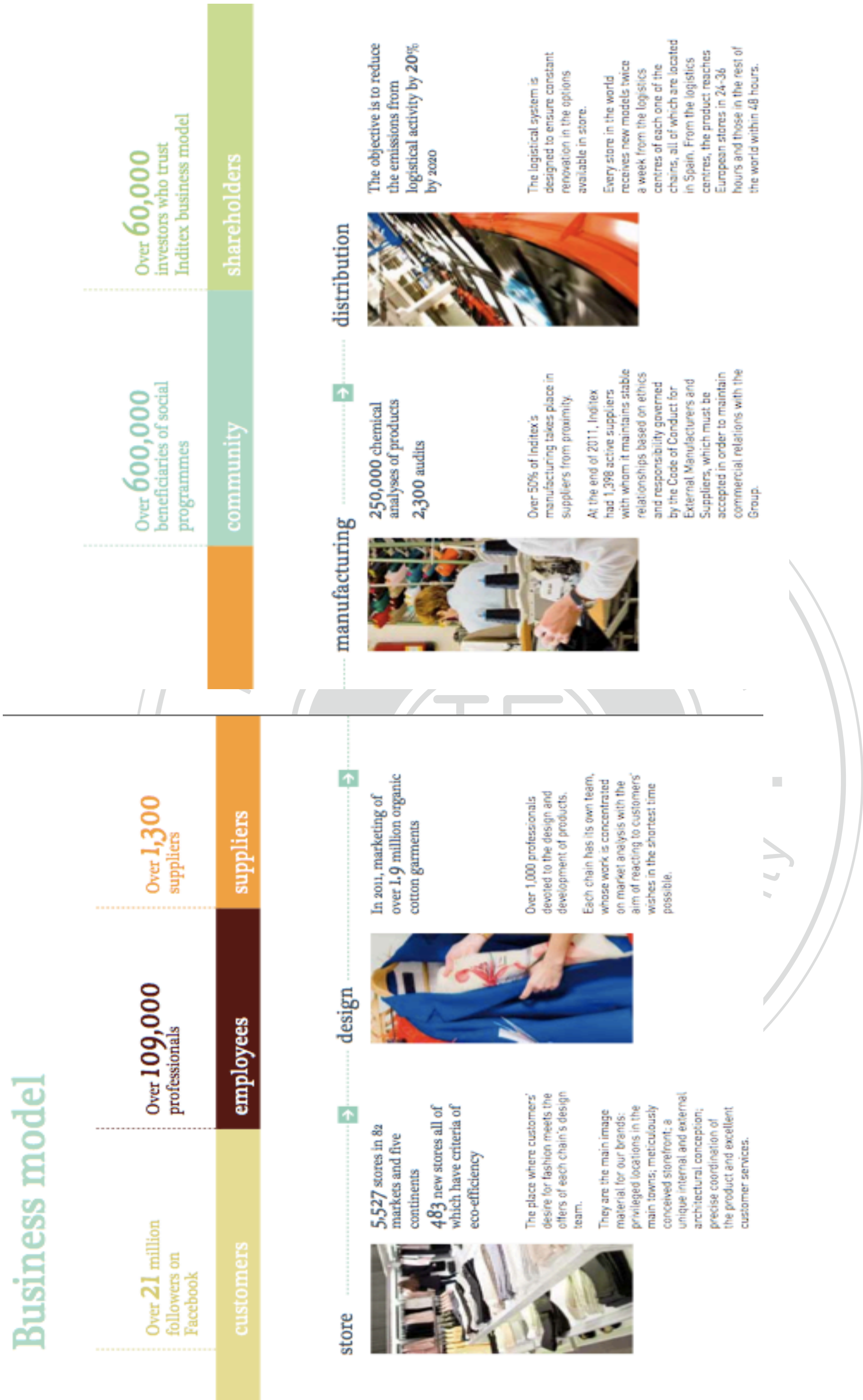
Sales by concept

INDITEX



Concept	FY2012	FY2011
Zara	66.1%	64.8%
Non Zara	33.9%	35.2%
Pull and Bear	6.8%	6.9%
Massimo Dutti	7.1%	7.3%
Bershka	9.3%	9.5%
Stradivarius	6.0%	6.3%
Oysho	2.0%	2.3%
Zara Home	2.2%	2.3%
Uterqüe	0.5%	0.5%

Appendix 3: Business model of the Inditex Group.



Appendix 4: Inditex stores open around the world, classified by the eight retail formats (including Zara Kids).

Stores around the world

Choose a geographic area to see the number of Inditex stores located there.

Around the world   Go

Around the world	
Zara	1.751
Zara Kids	174
Pull & Bear	816
Massimo Dutti	630
Bershka	885
Stradivarius	780
Oysho	524
Zara Home	357
Uterqüe	92
TOTAL	**6.009**

Last update: 01/31/2013

Appendix 5: History of global online sales of the chain stores in Inditex.

Global online sales

INDITEX

From 29 Oct 2007	Zara Home	Europe: Austria, Belgium, Denmark, France, Germany, Greece, Ireland, Italy, Luxembourg, Monaco, Netherlands, Portugal, Spain, Sweden, UK, Switzerland, Norway, Finland, Poland
2 Sept 2010	Zara	Spain, Portugal, France, Germany, Italy, UK
4 Nov 2010	Zara	Netherlands, Belgium, Luxembourg, Austria, Ireland
3 March 2011	Zara	Switzerland, Monaco, Sweden, Denmark, Norway
From 6 Sept 2011	Massimo Dutti, Bershka, Pull&Bear, Stradivarius, Oysho, Uterqüe	Europe
7 Sept 2011	Zara	United States
20 Oct 2011	Zara	Japan
7 March 2012	Zara	Poland
5 Sep 2012	Zara	China
Oct. 2012	Massimo Dutti, Zara Home	United States
6 March 2013	Zara	Canada
Progressive roll-out	All Concepts	Globally

Appendix 6: Global sales platform of Inditex during the financial years of 2011 and 2012.

Global sales platform

INDITEX

Store sales (%)	FY2012	FY2011
Europe ex-Spain	45%	45%
Spain	21%	25%
Asia & RoW	20%	18%
Americas	14%	12%

Appendix 7: Presence of Inditex stores in Taiwan

Taiwan Go

Taiwan	
Zara	5
Zara Kids	-
Pull & Bear	-
Massimo Dutti	1
Bershka	-
Stradivarius	-
Oysho	-
Zara Home	-
Uterqüe	-
TOTAL	6

Last update: 01/31/2013

Appendix 8: Chart of interviewees (11 customers)

Interviewees	Age	Occupation	Monthly income	Frequency visits last month in Zara	Monthly frequency visits in Zara	Monthly spending in Zara	Living areas	Knew Zara before its arrival in Taiwan
1 Jojo	18-22	Student & Part-time	Below 30,000 NTD	2	1	Between 2,000 NTD and 2,999 NTD	Wenshan District, Taipei city	No
2 Louise	18-22	Student, Dept. of Japanese	Below 30,000 NTD	3	3	None	Xin Yi District, Taipei city	Yes
3 Rachel	18-22	Student, Dept. of English	Below 30,000 NTD	2	2	Between 2,000 NTD and 2,999 NTD	Da an District	Yes
4 Vanessa	18-22	Student, Dept. of Arabic language and culture	Below 30,000 NTD	1	1	None	Wenshan District, Taipei city	No
5 Alba	18-22	Student, Dept. of Chinese Literature & Part-time	Below 30,000 NTD	1	1	Below 990 NTD	Songshan District, Taipei city	Yes
6 Valeria	18-22	Student, Dept of Chinese Literature & Part-time	Below 30,000 NTD	2	1	Below 990 NTD	Xinyi District, Taipei city	Yes
7 Laura	23-27	Master student of Telecommunications	Below 30,000 NTD	1	1	Between 1,000 and 1,990 NTD	Chiayi city	Yes
8 Vicky	23-27	Assistant at study abroad agency	Below 30,000 NTD	1	3	Between 1,000 and 1,990 NTD	Zuoying District, Kaohsiung city	No
9 Alice	28-32	Working at shipping company	Between 30,000 and 50,000 NTD	3	1	Between 2,000 and 2,990 NTD	Gongguan area, Zhongzheng District, Taipei city	Yes
10 August (field trip fashion consumer)	28-32	Freelance interior designer	Between 30,000 and 50,000 NTD	3	3	Between 2,000 NTD and 2,999 NTD	Dazhi area, Zhongshan District, Taipei city	Yes
11 Joanne	33-40	Working at international trade	Over 50,000 NTD	1	1	Between 1,000 and 1,990 NTD	Taipei city center	Yes

Appendix 9: Questionnaire for customers

「台灣的 Zara 消費者行為研究」

各位女士、先生：

您好！

我是政大傳播學院、國際傳播碩士學位學程的學生。我的名字是 Elena 吳凱麟。我出生在西班牙南部的馬拉加，而我在台灣待四年了。我的碩士論文主題為：「台灣的 Zara 消費者行為研究」。我在西班牙 Zara 研究過那邊的情況。自從 Zara 在 2011 年進入台灣之後，便引起一陣風潮，這令我對於台灣的 Zara 消費者很好奇，想要認識與瞭解她們，於是我決定將這份興趣發展為我的碩士論文主題。此調查問卷結果將僅供學術研究之用，絕不移作其他用途。再次感謝您百忙中撥冗幫忙填寫這份問卷。

1. 個人基本資料

1.01 年齡：

☐ 18 － 22
☐ 23 － 27
☐ 28 － 32
☐ 33 － 40
☐ 40 以上

1.02 教育程度：

☐大學
☐大學以上
☐其他

1.03 月收入：

☐三萬以下
☐三萬到五萬
☐五萬以上

2. 在台灣的 Zara

2.02 Zara 進入台灣之前，您認識這個品牌嗎？

☐ 不認識

☐ 認識

＊ 怎麼認識？☐ 雜誌

☐ 網路上

☐ 親戚朋友

☐ 旅行

☐ 其他

2.03 請問您近期一個月到 Zara 的次數是多少？

☐ 1 次 ☐ 2 次 ☐ 3 次 ☐ 3 次以上

2.04 請問您平均一個月到 Zara 的次數是多少？

☐ 1 次 ☐ 2 次 ☐ 3 次 ☐ 3 次以上

2.05 請問您平均會購買 Zara 產品？

☐ 無

＊如果打勾無，請直接到 3.

☐ 有

＊ 如果有，約幾項？

襯衫___ 外套___ 連衣裙___ 褲子___ 鞋___

配飾___ 其他_____________

2.06 請問您一個月內，在 Zara 的平均消費是多少？

☐ 990 台幣以下

☐ 1,000 台幣 – 1,990 台幣

☐ 2,000 台幣 – 2,990 台幣

☐ 3,000 台幣 – 3,990 台幣

☐ 4,000 台幣 – 4,990 台幣

☐ 5,000 台幣以上

2.07 您在甚麼場合裡會穿上 Zara 的服裝或配飾？(可選兩項)

☐ 上課 ☐ 上班 ☐ 戶外活動 ☐ 生日派對

☐ 其他 * 請問，甚麼樣的場合？__________________

3. Zara 品牌

3.01 您對 Zara 這品牌有如何的感覺？

____

3.02 您覺得 Zara 這品牌的價值在於

____

3.03 請問您會把 Zara 品牌定位在哪裡（請在空間寫下一兩個品牌）

有什麼品牌您認為比 Zara「高級」或「昂貴」: ________________________？

有什麼品牌您認為比 Zara「大眾」或「平價」: ________________________？

3.04 您跟 Zara 服裝或配飾有著什麼關係？

____

再次感謝您的填答！

請問您是否願意留下連絡資訊，並接受後續的訪談？

姓名：

手機：

email：

Reference

Agence France-Presse. (2013 March 15). Inditex (Zara) sortea crisis en España gracias a su expansión en Asia. *Yahoo! México Finanzas*. Retrieved from http://mx.finanzas.yahoo.com/noticias/inditex-zara-sortea-crisis-españa-204100282.html

Anxiety. In Oxford Dictionaries. Retrieved from http://oxforddictionaries.com/definition/english/anxiety?q=anxiety

Arnold, R. (2001). *Fashion, desire and anxiety: Image and morality in the 20th century*. New Brunswick, N. J.: Rutgers University Press.

Barnard, M. (2007). *Fashion Theory: A reader*. New York: Routledge Student Readers.

Cachon, G., & Swinney, R. (2011). The Value of Fast Fashion: Quick Response, Enhanced Design, and Strategic Consumer Behavior. *Management Science, vol. 57,* (4), 778-795. Retrieved from http://www.stanford.edu/~swinney/FastFashion.pdf

Carlyle, E. (2013 March, 4). The Year's Biggest Winner: Zara Billionaire Amancio Ortega. *Forbes*. Retrieved from http://www.forbes.com/sites/erincarlyle/2013/03/04/the-years-biggest-winner-zara-billionaire-amancio-ortega/

Chung, O. (2012 January, 6). Nurturing the Fashion Industry. *Taiwan Today*. Retrieved from http://taiwantoday.tw/ct.asp?xItem=190961&CtNode=124

Crane, D. (2000). *Fashion and its social agendas: Class, gender, and identity in clothing*. Chicago: University of Chicago Press.

Fashion. In Merriam-Webster Dictionary. Retrieved from http://www.merriam-webster.com/dictionary/fashion

Ferdows, K., Lewis, M., & Machuca, J. (2003). Case Study: Zara. *Supply Chain Forum: An International Journal, vol. 4,* (2), 62-67. Retrieved from http://www.supplychain-forum.com/documents/articles/Case%20Study%20Zara1.pdf

Ferdows, K., Lewis, M., & Machuca, J. (2004, November). Zara's Secret for Fast Fashion, *Harvard Business Review*, *vol. 82,* (11).

Ghemawat, P., & Nueno, J. (2003). Zara: Fast Fashion. Case study. *Harvard Business School,* 1-35. Retrieved from http://researchingsustainability.files.wordpress.com/2012/01/zara-harvard-case.pdf

ICEX (2011 May, 9). Empresas españolas establecidas en: Taiwán [Spanish companies established in: Taiwan]. Retrieved from http://www.oficinascomerciales.es/icex/cda/controller/pageOfecomesGen/0,5936,5398971_5399906_5503422_4485228_TAI,00.html

Kawamura, Y. (2005). *Fashion-ology*. Oxford; New York: Berg.

Lane, R. (2000). Jean Baudrillard (Routledge Critical Thinkers). *Use-value and exchange-value* (pp. 67-77). London & New York: Routledge.

Martínez Barreiro, A. (2006*).* La difusión de la moda en la era de la globalización. *Universidad de la Coruña. Facultad de Sociología,* 187-204. Retrieved from http://ddd.uab.es/pub/papers/02102862n81/02102862n81p187.pdf

Martínez, D. (2012). *Zara: Visión y estrategia de Amancio Ortega*. Barcelona: Conecta.

Mass fashion. In Glencoe/McGraw-Hill Glossary. Retrieved from http://www.glencoe.com/sec/busadmin/marketing/dp/ap_and_acc_mktg/gloss.shtml

Monneyron, F. (2006). *50 respuestas sobre la moda*. Barcelona: Gustavo Gili.

Paro España, Tasa de paro 2013. (Unemployment in Spain, unemployment rate in 2013) Retrieved from http://www.datosmacro.com/paro/espana

Royo-Vela , M. & Casamassima, P. (2010). The influence of belonging to virtual brand communities on consumers' affective commitment, satisfaction and Word-of-mouth advertising: The ZARA case. *Online Information Review, vol. 35*, (4), 517-542. Retrieved from http://www.emeraldinsight.com/journals.htm?articleid=1944272

Squicciarino, N. (2006) *El vestido habla* (5th ed.). Madrid: Cátedra

Sowden, L-J. & Grimmer, M. (2009). Symbolic Consumption and Consumer Identity: An Application of Social Identity Theory to Car Purchase Behaviour, 1-9. Melbourne, Australia: ANZMAC Conference (Australia and New Zealand Marketing Academy). Retrieved from http://www.duplication.net.au/ANZMAC09/papers/ANZMAC2009-206.pdf

Tan, J. (2011 November, 5). Spanish fashion retailer Zara opens at Taipei 101. *Taipei Times*. Retrieved from http://www.taipeitimes.com/News/biz/archives/2011/11/05/2003517470

Wang, Y. (2010). *Consumer Behavior: Characteristics in Fast Fashion*. Retrieved from http://bada.hb.se/bitstream/2320/7723/2/2010.13.16.pdf

Yang, M. (2011, December 9). 非懂不可時尚首富成功經. *遠見 Global Views Monthly*, 4-129.

Yang, M. (2006, December 1). 平價奢華風. *遠見 Global Views Monthly*, 246-192.

Fashion Retailers Websites

Baleno http://www.baleno.com.hk/

Fast Retailing http://www.fastretailing.com/eng/

Giordano http://www.giordano.com.tw/

Hang Ten http://www.hangten.com.hk/

Inditex Group http://www.inditex.com/en

Net http://www.net-fashion.net/

Uniqlo.com http://www.uniqlo.com/tw/

Zara http://www.zara.com