



**Faculty of Legal Sciences**

**School of International Studies**

Omnichannel as a Competitive Strategy for Differentiation  
and Customer Connection in the International Market. Case  
Studies: Zara and H&M

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For Lorena Abad Crespo, who was like my older sister,  
she was always present in my life as a guide, an  
example, and a constant support. From the place of  
light where you are, I hope yo can share this  
achievement and continue accompanying me with your  
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# **Omnicanalidad como Estrategia Competitiva de Diferenciación y Conexión con el Cliente en el Mercado Internacional. Casos de Estudio: Zara y H&M**

## **RESUMEN**

La presente investigación tiene como principal objetivo, analizar el sector textil, específicamente los casos de Zara y H&M. Esto se da con el fin de poder determinar de qué manera la omnicanalidad se ha consolidado como una estrategia competitiva orientada a la diferenciación y conexión con el cliente dentro del mercado internacional. Metodológicamente este trabajo de titulación se desarrolla por medio de un enfoque cualitativo, el cual tiene inmerso el análisis de los casos de estudio y la aplicación de 20 entrevistas semiestructuradas a consumidores de estas dos marcas. Los hallazgos, evidencian que ambas empresas implementan estrategias omnicanales, aunque con enfoques diferentes. De igual manera, se identifican similitudes en base a ciertas estrategias competitivas de omnicanalidad aplicadas dentro del entorno empresarial de cada una de las compañías. Finalmente, se indica que la omnicanalidad si tiene relación e influencia en la conexión y diferenciación del cliente; sin embargo, su impacto depende tanto de las empresas como el nivel de aplicabilidad por parte de los consumidores, evidenciando así una brecha relevante que está presente entre dicha estrategia y su función en la práctica real.

**Palabras clave:** comportamiento del consumidor, comercio electrónico, diferenciación, industrial textil, integración de canales, omnicanalidad, posicionamiento.

# **Omnichannel as a Competitive Strategy for Differentiation and Customer Connection in the International Market. Case Studies: Zara and H&M**

## **ABSTRACT**

The present research aims to analyze the textile sector, specifically the cases of Zara and H&M. This is carried out in order to determine how omnichannel has been consolidated as a competitive strategy oriented toward differentiation and customer connection within the international market. Methodologically, this study is developed through a qualitative approach, which includes the analysis of case studies and the application of 20 semi-structured interviews with consumers of these two brands. The findings indicate that both companies implement omnichannel strategies, although with different approaches. In the same way, similarities are identified based on certain competitive omnichannel strategies applied within the business environment of each company. Finally, it is concluded that omnichannel does have a relationship and influence on customer connection and differentiation; however, its impact depends both on the companies and on the level of adoption by consumers, thus evidencing a relevant gap between this strategy and its function in practice.

**Keywords:** channel integration, consumer behavior, differentiation, e-commerce, omnichannel, positioning, textile industry.

# INTRODUCTION

At present, globalization and the advancement of digitalization processes have significantly transformed the business dynamics of the textile sector, characterized by a high level of competitiveness and a constant need for innovation. These changes have generated new forms of consumption, where customers demand faster, more integrated, and personalized shopping experiences; aspects that require companies to rethink their commercial strategies in order to adapt to an increasingly digital environment.

Within this context, omnichannel has taken on an important role, as it is seen as a strategy that allows the integration of physical and digital channels in order to offer a better shopping experience for consumers. Unlike traditional models, this approach is not limited to being present in multiple channels, but seeks to connect them, making it easier for customers to interact continuously with the brand.

In the textile sector, companies such as Zara and H&M have incorporated omnichannel strategies into their business models, establishing themselves as benchmarks in the market. However, despite operating in the same competitive context and sharing certain characteristics, these companies tend to show differences in the way they implement their strategies, an aspect that directly influences consumer perception, the level of connection with the brand, and the elements that create added value.

Based on this issue, the main objective of this research is to analyze how omnichannel has become a competitive strategy focused on differentiation and customer connection at a global level, taking Zara and H&M as case studies. Methodologically, this thesis is developed through a qualitative approach, based on secondary sources and the application of 20 semi-structured interviews with consumers of both companies residing in the city of Cuenca, Ecuador, who have had shopping experiences in both physical stores and digital channels. The selection of participants was carried out through non-probabilistic convenience sampling, considering accessibility and compliance with the criteria established for the research. Subsequently, the responses obtained were tabulated and organized into categories of analysis, allowing the interpretation of consumers' perceptions and experiences regarding the omnichannel strategies implemented by both brands.

# **CHAPTER 1**

## **THEORETICAL FRAMEWORK AND STATE OF THE ART**

### **1.1 Theoretical Framework**

#### **1.1.1 Introduction to the Theoretical Framework**

For the theoretical framework of this thesis, the focus will be on establishing the key concepts and foundations that support the research question. This section will also analyze the fundamental theories of competitive advantage proposed by Michael Porter, which are directly related to the study, as well as contributions from other relevant authors such as Al Ries and Jack Trout. The purpose is to understand the relationship between all the variables and components involved in business dynamics.

#### **1.1.2 Definition of Omnichannel**

According to Roldán Sepúlveda et al. (2022), omnichannel is considered the evolution of the multichannel approach, as it allows companies to connect directly with consumers with the objective of providing a unified experience that fosters customer loyalty. The authors state that, from a competitive perspective, this strategy generates greater sustainable advantages by optimizing resources and increasing operational efficiency. The study highlights that among the most relevant elements within an omnichannel strategy are the diversification of delivery methods, ranging from traditional parcel services to integrated inventory systems and the use of specialized technological tools. These tools enable the automation of processes, improving product traceability and synchronizing both physical and digital channels. Additionally, the authors emphasize the importance of maintaining an omnichannel stock system, implementing a PIM (Product Information Management) system for catalog management, and using courier integration systems to optimize shipping processes. Through this study, it is possible to identify fundamental systems, such as inventory rotation optimization tools, that should be considered when implementing this strategy. According to the results presented, omnichannel is regarded as a profitable strategy that improves operational efficiency within companies while significantly reducing costs.

In the Libro Blanco de Omnicanalidad published by the Asociación Mexicana de Venta Online, Blaise (2020) highlights the importance of considering digital transformation, which has generated a significant shift in commerce. According to the author, this transformation has been characterized by a greater level of digital density that affects both online transactions and traditional forms of commerce. Additionally, Delgado Fernández

(2020) describes this process as a cultural paradigm shift in which the main focus is placed on customer experience and engagement. The fundamental principles of this transformation include hyperconnectivity and the emergence of new business models. In this context, it is emphasized that the experience of all consumers should be seamless and personalized regardless of the channel used. Although physical stores are not expected to disappear, since consumers still value the kinesthetic dimension that allows immediate purchases and direct interaction with people inside the store, these establishments must adapt to the growing digital environment within modern society. E-commerce is rapidly evolving toward what is known as New Retail, and in recent years omnichannel strategies have gained greater relevance in commerce due to their impact across different business areas. The development of advanced digital ecosystems in countries such as China, particularly through their technological platforms, exemplifies the scope and potential of this strategy, which can serve as a reference for retailers worldwide. However, the book also highlights several challenges associated with omnichannel logistics. One of the most important issues refers to inventory visibility, where the author emphasizes that maintaining strict inventory control is essential, since managing a digital channel requires different operational structures compared to the traditional physical store model.

### **1.1.3 Business Environment**

In the business context, understanding the environment in which organizations operate is essential for their effective performance, regardless of the sector or size. It is important to recognize that the business environment is constantly changing due to various factors that may influence a company's operations, whether these arise internally or externally. Understanding this environment allows organizations to identify growth opportunities, anticipate potential threats, and adjust their business strategies accordingly. From the entry of new competitors to shifts in consumer preferences, each aspect of the business environment can have a significant impact on the performance and viability of organizations (Nsor, 2008).

According to the *Revista de Ciencias Sociales* of the University of Zulia, the business environment is also influenced by public policies implemented by different countries. These policies can generate a direct impact on business development. Due to this aspect, organizations must maintain constant monitoring of the environment in which they operate in order to support effective decision-making. Likewise, in a society characterized by globalization, events that occur either within a country or among its trading partners may

produce effects that are transmitted to companies and influence their business dynamics (Hernández Fernández, 2016).

#### **1.1.4 Theory of Competitive Advantage (Michael Porter)**

In 1980, through the book *Competitive Strategy: Techniques for Analyzing Industries and Competitors*, Michael Porter, proposed that the structure of the industry in which a company operates determines its level of profitability and its ability to remain competitive. Under this theoretical approach, Porter develops his model known as the Five Competitive Forces:

1. Rivalry among existing competitors.
2. Threat of new entrants.
3. Threat of substitute products.
4. Bargaining power of suppliers.
5. Bargaining power of buyers.

These forces determine the degree of market attractiveness and the strategic position that companies must adopt. The author argues that, in order to achieve competitive success, firms must have the capacity to strengthen these strategies and maintain a sustainable position in relation to their rivals (Porter, 1980).

Subsequently, in 1985, Porter expanded on this approach through his book *Competitive Advantage: Creating and Sustaining Superior Performance*. In this book, the author provides an extensive analysis and further develops the concept of competitive advantage as an essential tool for business success. In addition, he argues that this advantage occurs when a company is able to create value for their customers, focusing on the difference between the price that buyers are willing to pay and the cost of producing the product or service, which develops from the way in which companies organize and manage their strategic activities. The sustainability of this advantage is related to the ability of organizations to innovate and adapt to changes in the environment. Companies that successfully integrate these aspects will achieve differentiation from their competitors. Within this context, competitive advantage is understood as a dynamic process in which companies must constantly evaluate their decisions in order to preserve added value and anticipate transformations in the market. Through this work, the concept of the value chain is also introduced, an analytical model in

which the internal activities of an organization that contribute to value creation are identified (Porter, 1985).

On the other hand, Porter (1980) argues that companies can achieve competitive advantage through three generic strategies: cost leadership, differentiation, and focus. In contrast, the study conducted by Islami et al. (2020) shows that these strategies have a direct relationship with business performance, although with different degrees of impact. Through this study, the authors explain that, although the strategies proposed by Porter contribute to organizational performance, the differentiation strategy demonstrates the greatest impact, representing approximately 43.9% of business performance. According to the authors, these results occur because this strategy allows companies to offer products or services with unique characteristics that increase the value perceived by consumers, thereby strengthening their positioning within the market. For its part, cost leadership, although is used to strengthen the efficiency and effectiveness of companies, the analysis highlights that when it is maintained for extended periods, it may lead to a disruption within the industry, as it could generate a high level of price rivalry. In relation to this study, it is observed that the generic strategies proposed by Michael Porter continue to serve as a reference for understanding the adaptability of competitive advantage within companies and their performance in business environments that are becoming increasingly dynamic and globalized.

### **1.1.5 Differentiation Strategy**

According to Carrió y Segura (2006), differentiation refers to a strategy that provides products or services with unique characteristics in order to make them appear distinct and more valuable compared to those offered in the market. The authors argue that, for a differentiating attribute to be effective, it must be significant and perceptible to consumers.

However, Sharp and Dawes (2001) provides another perspective on this topic, since in this article, the authors explain that this strategy should also focus on enabling brands to reduce consumer price sensitivity through other attributes, such as price, with the aim of decreasing direct competition. The authors state that when differentiation is effective, a company will be able to optimize costs since it will not need to match all the characteristics expected by consumers. The present article analyzes an important aspect by demonstrating that differentiation does not only depend on the functional attributes of the products offered in the market, but can also be achieved through elements such as distribution and brand

recognition, as these components have a high degree of influence on consumer preference, which generates competitive advantages that are sustainable within the market.

### **1.1.6 Brand Positioning**

The value of a brand is not only linked to its tangible attributes, it also depends on its ability to occupy an exclusive and, above all, positive place in the minds of consumers. As a concept, brand positioning is a process that involves the study, definition, and implementation of an offering that must necessarily be differentiated, as this enables a better position within the external environment. Regarding its origins, the authors do not indicate an exact date; however, the concept gained relevance during the 1970s through the contributions of Al Ries and Jack Trout, those who introduced this perspective in a well-known article. Brand positioning emerged as a response to the excess of products and advertising messages during that period. Since then, the concept has evolved through advertising and communication, with contributions from additional authors who have emerged over time. The authors identify two key aspects: 1. perceptual positioning, which focuses on how consumers perceive a brand within the market, and 2. organizational positioning, which is linked to the competitive strategy of a company and aims to define the place that the organization occupies in the market (Serralvo & Furrier, 2005).

As evidenced over time, new needs have emerged within the business environment. However, more recent authors argue that brand positioning remains an intangible asset necessary to achieve competitiveness, as previously demonstrated. At the same time, it is important not to overlook the current environment shaped by social media, since these platforms enable direct and continuous interaction with consumers who are increasingly digitalized. According to a study conducted on a Peruvian company called IPEX, a strong relationship can be observed between brand positioning and the level of purchases generated through social media. This finding demonstrates that, today, the stronger the level of brand positioning achieved, the higher the digital purchase intention among consumers. As social media has become a widely recognized and frequently used channel among customers, brands are able to reach a broader audience through different digital platforms. Consequently, these platforms contribute to strengthening customer loyalty and fostering a positive perception of a particular brand (Urrutia-Ramírez & Napán-Yactayo, 2021).

### **1.1.7 Omnichannel Retail**

Omnichannel retail refers to a strategic model that integrates sales and communication channels within companies, whether these are carried out through digital or physical means. Its objective is to provide a personalized customer experience, which differentiates it from the multichannel model, where channels operate independently. According to the authors, this approach is not only used as a means to commercialize products through multiple channels, but also to connect the data and processes required within logistics operations. Through these mechanisms, companies are able to better anticipate market demand. Omnichannel retailing has become a key factor in this sector, as it enables companies to respond more quickly to market demands (Phipps Sam, 2025).

On the other hand, Brynjolfsson et al. (2013) highlight the importance of recognizing that omnichannel retail operates in an environment where technological advancements are increasingly eliminating the boundaries between physical and digital commerce. The authors emphasize that these innovations allow consumers to access relevant product information more efficiently, such as prices, product availability, and even reviews from other customers who have shared their purchasing experiences, this information can be accessed even when the consumer is physically present in a store. As a result of these factors, consumers are able to simultaneously combine digital resources, creating an integrated shopping environment.

In line, with the arguments presented by the previous author, H. Li and Wu (2022) express the same concept; however, they introduce three strategies that combine both physical and digital channels, such as BOPS, which refers to the option to buy online and pick up in store. The authors point out that it is important to recognize that effective inventory management and pricing policies can improve profitability and response times for consumers. Furthermore, they emphasize the importance of coordinating logistics processes across different channels, as this allows companies to strengthen both internal and external systems within the environment in which they operate. According to, Thaichon et al. (2022), their analysis highlights that tools such as inventory management systems and digital platforms contribute to effective data analysis. These tools help relate all operations carried out within retail environments, whether in physical stores, digital channels, or even at distribution points, with the objective of achieving inventory visibility in order to synchronize operations.

## **1.2 State of the Art**

### **1.2.1 Introduction to the State of the Art**

Over time, omnichannel strategies have increasingly emerged as a fundamental approach to achieving differentiation. By integrating various channels that facilitate and enhance the customer experience, companies are able to expand their scope and pursue a highly desired objective, namely customer loyalty. Through the state of the art, this section seeks to identify recent developments and updated studies that are directly related to this strategy within the textile sector, analyzing companies with similar characteristics that will be used as case studies in the following chapters. Through secondary sources, the main factors that help explain how omnichannel strategies have become an indispensable tool within the textile sector are examined.

### **1.2.2 Relationship Between Omnichannel and the Textile Sector**

The fashion industry is undergoing constant transformation driven by digitalization and the evolving needs of consumers. According to the authors of this article, omnichannel is perceived as a business model in which customers can experience a different and more integrated purchasing journey. The study analyzes several Spanish companies and demonstrates that omnichannel strategies not only integrate sales channels but also place the consumer at the center of the interaction, allowing greater participation through various digital tools such as online platforms. This dynamic contributes to generating greater proximity and convenience, as it strengthens communication between companies and their consumers, thereby improving brand positioning. Regarding the results of the study, it can be observed that the integration of channels helps eliminate many of the barriers that traditionally existed between them. The study also highlights the growing importance of social media, where consumers increasingly become active participants, a factor that companies must take into consideration (Lorenzo-Romero et al., 2020).

It is important to highlight the role that smartphones play in humans' current context, as it has become a fundamental element in both the physical and digital fashion environments. As Chimborazo Azogue (2022) points out, mobile phones are considered a key instrument of connectivity. These devices are indispensable at every stage of the purchasing process, ranging from searching for information about a specific product to completing the transaction or payment. Consequently, smartphones have become an essential component that supports and sustains omnichannel strategies.

### **1.2.3 Adaptation of Omnichannel Strategies in the Textile Sector**

Among the studies conducted on omnichannel retailing in the textile sector, it is important to note the research carried out by Fernández-Sabiote et al. (2020), the authors analyze nine leading companies in Spain that stand out in the sports products market, such as Decathlon España SAU, Nike Barcelona Merchandising SL, Foot Locker Spain SL, and Decimas SLU, among others. This article begins with an overview of the market's significance within the Spanish economy, analyzing through a table the revenue for 2017 and 2018 for each of the cases under study, and also indicating their growth rates. Subsequently, the authors examine consumer trends, highlighting that customers increasingly have higher expectations regarding the desired shopping experience. As a result, new consumer behaviors have emerged that integrate both physical and virtual stores, allowing consumers to maintain a purchasing style that enables them to shop at any time and from any location. Regarding the omnichannel strategy, connectivity, integration, consistency, flexibility, and personalization are highlighted as key dimensions that demonstrate the challenges faced by brands seeking a successful strategy.

The results of this study show that omnichannel strategies emerge as a fundamental pillar for achieving a strategic competitive advantage. According to the analysis, the success of this approach is not related to the size of the organization but rather depends on the strength of its organizational model and the relationship among the different agents within the value chain, such as franchisees and partners. In this case, Decathlon stands out as a leading company within the evaluated sector due to its high levels of integration and flexibility compared to its competitors. This research also emphasizes that there is still a gap between the level of omnichannel integration demanded by consumers and what is actually offered by companies. According to the authors, greater investment in technological and logistical areas is required in order to achieve proper channel integration and provide customers with a differentiated experience within the market.

### **1.2.4 Omnichannel Strategy Adoption at Uniqlo**

Uniqlo is a Japanese clothing brand whose identity is based on the concept of creating garments that are essential, functional, and accessible for everyday life. According to its publication in *LifeWear Magazine*, the brand's objectives have been developed in accordance with Japan's social and geographical context, which has served as a fundamental pillar in guiding the design of its products according to consumer needs (UNIQLO, 2021).

This Brand has been a leader in omnichannel retailing within the industry, Li (2024) analyzes this case study and highlights that the brand has an extensive network of physical stores equipped with advanced digital platforms, particularly through the use of WeChat, which is used as a tool to connect the online and offline environments. Through this digital tool, consumers are able to make purchases, browse the brand's catalog, or even access information about products on sale. The author's study demonstrates that Uniqlo has successfully established a unified system where the integration of inventory, systems, and data across channels operates effectively. Additionally, this article highlights the omnichannel practices available to the brand's customers.

From a strategic and operational perspective, Kumar and Majumdarr (2022) analyze this case as an example within the textile sector due to its global leadership position in the casual apparel segment. This work focuses on the company's trajectory, its value chain, and its main competitors. The study reveals that Uniqlo operates under the Specialty Store Retailer of Private-Label Apparel (SPA) model, which is essential for maintaining comprehensive control over the design, production, and sales stages. Regarding the sales component, the authors highlight that Uniqlo has developed an integration of online and offline channels that is not very conventional, as both channels reinforce each other within the company's business model. This integration is supported by technological innovation, mainly through the use of its mobile application, which provides customers with an extensive digital experience while also encouraging visits to physical stores through exclusive promotions. In summary, the authors emphasize that the combination of these elements has allowed the brand to achieve differentiation and establish a solid competitive advantage over its direct.

### **1.2.5 Omnichannel Strategy Adoption at Gap**

Gap is a company founded in 1969 in the United States with the objective of facilitating access for different consumer segments to basic clothing items, particularly its distinctive jeans. Over time, the company has evolved and now operates in multiple markets, a process which has been marked by constant adaptation to changes in the business environment, where its competitive strategies have had to adopt a focus on the customer (Gap inc., n.d.).

By 2018, Gap prioritized the needs and demands of its customers by adopting a marketing approach focused on personalization, which integrated consumer data collected through physical stores, digital platforms, and loyalty programs. This was done to better understand customer behavior and preferences. Thanks to this strategy, the company was able to develop a stronger focus on the customer and improve its business performance (Sonsev, 2018).

According to a subsequent study by Harrison et al. (2022), the company faced an environment marked by instability caused by the COVID-19 pandemic and increasing pressure from competitors within the fashion industry. In this context, Gap implemented significant changes to its corporate purpose and business model. Consequently, it adopted the principle of “inclusive by design” as a central pillar for developing its strategies, supported by the three-year brand growth plan known as Power Plan 2023. This plan incorporates the omnichannel concept, where the integration of channels plays a fundamental role. The authors also point out that these measures were significant in guiding the company toward innovation and the use of digital technologies, which, according to the results, contributed to the company’s financial recovery, reflected in a notable increase in revenues compared to the year analyzed.

## **CHAPTER 2**

# **IDENTIFICATION OF DIFFERENT OMNICHANNEL COMPETITIVE STRATEGIES TO ACHIEVE CUSTOMER CONNECTION AND DIFFERENTIATION IN THE INTERNATIONAL MARKET THROUGH CASE STUDIES (ZARA AND H&M)**

### **2.1 Zara Case of Study**

Based on information from the official website of the Inditex group, Zara was founded in 1975 by Amancio Ortega in La Coruña. Through the book written by David Martínez, it is possible to examine the trajectory of Mr. Ortega, who, despite having no college education, demonstrated an exceptional capacity for observation and learning, which allowed him to successfully position the brand in the market. As Martínez explains in his book, Zara has managed to integrate its design, production, and distribution processes through a system based on speed in responding to market demand (Inditex, 2025; Martinez, 2012).

The study conducted by Nueno and Ghemawat (2006) shows that by the early 2000s, the company already had more than 500 stores worldwide and represented a high figure in terms of sales and profits for the Inditex group. From its beginnings, Zara developed a unique business model that enabled the company to respond rapidly to market trends and consumer demand, allowing it to introduce new designs in as little as four to five weeks. This capability was made possible because the company produces most of its garments internally and has maintained a strong level of vertical integration, which adds considerable value to the production process. Based on the information presented by the authors, it is possible to observe the growth and strategies developed by the company over time. The study highlights key aspects such as its markets and customers, its main competitors, and its business system, among others.

In early 2010, Zara introduced its first online store, Zara.com, for its fall–winter collection in Spain, France, Germany, the United Kingdom, Italy, and Portugal. This initiative was considered a strategic milestone for the Inditex group. During this period, the company adopted the clicks and mortar model, which combines physical and digital channels in order to achieve a more direct and effective connection with its consumers. According to the author of the article, this strategy is essential for strengthening key aspects of the

company, particularly its modern image and its presence in the minds of consumers (Caraballo, 2011).

Based on this brief analysis of the historical evolution and the development of Zara's business model, it becomes evident that over time, the company has developed a strategic approach oriented toward continuous adaptation to changes in the business environment. The following section analyzes the company's omnichannel competitive strategies, considering their main components and the relevance of each of them for the company's development.

### **2.1.1 Vertical Integration**

Martínez Barreiro (2007) argues that, in the case of Zara, this strategy forms the structural foundation of its business model and its competitive advantage within the textile sector. The author explains that the company integrates design, production, logistics, and commercialization, which represent the main stages within its value chain. Based on this study, we can see that Zara carries out approximately 40% of its production internally, and around 92% of its stores are directly owned by the company, demonstrating the high level of control it maintains over its operations. Furthermore, it is also noteworthy that only about 15% of the collection is typically completed at the beginning of the season, allowing the company to easily make adjustments according to market behavior.

From a supply chain perspective, Aftab et al. (2018) explain that Zara's vertical integration allows the company to maintain direct control over activities such as manufacturing processes, including cutting and dyeing, as well as its distribution centers. The study indicates that the company does not strictly follow the conventional practices of the sector, as it commits only a small percentage of production before the beginning of the season. This approach enables the company to sell nearly 85% of its products at the original marked price from the time of launch. In addition, the authors highlight the coordination of systems supported by technological tools, which aim to facilitate a greater flow of information from stores to both the design and production departments.

On the other hand, Pavlidou and Tsami (2025) identify Zara as a prominent example of vertical integration within its supply chain. In their analysis, the authors highlight that the company uses a system known as *just in time*, in which small inventory batches are managed in order to avoid excess stock. They also point out that the company is able to dispatch new products to stores in less than two weeks, allowing it to constantly renew its collections.

### **2.1.2 Internationalization**

As mentioned above, Zara is a company with a long trajectory. Regarding its internationalization process, the company has been characterized by a global orientation implemented since the early stages of its development. Zara's international expansion emerged as a strategy capable of responding to both internal and external factors. The main reason the organization decided to expand was the limited absorption capacity of the Spanish market during the 1980s, which led the company to seek growth opportunities outside its country of origin. This process developed through different stages, beginning with markets that offered advantages in terms of geographic proximity or cultural similarity. The company adopted different entry modes depending on the characteristics and requirements of each destination market. As a result of this approach, the company was able to balance control and risk in relation to its international growth (Lopez & Fan, 2009).

According to Yin (2022), the brand is considered a born-global company, as its international expansion did not occur as a later stage following its domestic development. The author explains that Zara gradually expanded its presence through the progressive opening of physical stores across multiple markets, followed by the launch of its online store available globally. Furthermore, the author highlights that the company's internationalization strategy is based on the constant exchange of information between stores and the headquarters. This process allows the company to adapt its offerings to different markets by taking into account the specific preferences of consumers in each location.

In addition, Zhu (2022) emphasizes that the company has been able to consolidate its growth due to the integrated system it operates, which facilitates the introduction of products into different markets. The analysis also highlights that Zara maintains strong control over its value chain, allowing the company to respond rapidly to emerging trends in the various countries where it operates.

This organization has stood out due to its strategic planning in market selection and entry modes, using different mechanisms of international expansion such as franchises, company-owned stores, or strategic alliances depending on the characteristics of the country they aim to enter. By maintaining centralized logistics operations in Spain, Zara has been able to preserve a high level of consistency in its international management, which contributes to ensuring efficiency in supplying products to its stores worldwide (João et al., 2010).

It is important to note that Zara is part of the Inditex Group, which has a significant international presence through its global network of physical stores. According to the group's results report, as of July 31, 2025, Zara operated 1,534 physical stores worldwide, positioning it as the brand with the greatest presence among the group's brands. In total, Inditex recorded 5,528 stores during this period, including brands such as Zara Home, Lefties, Pull&Bear, Massimo Dutti, Bershka, Stradivarius, and Oysho. Likewise, the report indicates that Inditex operates across several regions, including Asia, America, Europe, and Spain, which is presented as an individual market, reflecting the international scope of the group (Inditex, 2025).

### **2.1.3 Physical Point of Sale**

The physical point of sale of Zara goes beyond its purely commercial function. The company seeks to ensure that each of its stores represents a space where consumers can experience elements that influence their perceptions, emotions, and purchasing behavior. To achieve this objective, the brand's stores are characterized by spacious layouts, neutral lighting, and an architectural style with strong visual impact. Additionally, these points of sale incorporate various sensory stimuli such as the brand's distinctive fragrance, music tailored to its target audience, and the opportunity for consumers to physically interact with the garments and assess their quality. These elements strengthen the company's identity while also enhancing the overall customer experience (Marín Dueñas & Gómez Carmona, 2021).

On the other hand, Jiménez Morales and Corral Avitia (2018) highlight that the point of sale of Zara is structured in a way that effectively guides consumers within the store. This is reflected in the layout and organization of key areas such as payment points and fitting rooms. The authors also emphasize the importance of departmental signage, which facilitates the identification of different sections and allows customers to have a more organized and precise shopping experience.

### **2.1.4 Production**

The production system of Zara is based on an operational structure that focuses on maximizing responsiveness to variability in the international market. According to Ji (2025), the company's production activities are primarily located in Spain and Portugal, where garments oriented toward fashion items with highly fluctuating demand are manufactured. At the same time, the company maintains an efficient supply chain in Asia that is dedicated

to the production of basic products characterized by relatively stable demand. By dividing production according to product categories, the company is able to adopt the appropriate levels of flexibility and control depending on the requirements of each product. This approach reduces production lead times and facilitates frequent product replenishment in stores. Based on this production system, inventory is not strictly limited by seasons but can respond more dynamically to market demand, which strengthens a competitive advantage directly related to operational speed and continuous adaptation to consumer needs.

From a practical perspective, it is important to note that the production model of Zara prioritizes responsiveness compared to traditional production systems. The company manufactures products in relatively small volumes, which allows it to analyze the market performance of each item and subsequently decide whether to expand its production. This approach helps reduce the risk of excess inventory and becomes a key factor in maintaining a constant product rotation (Ferdows et al., 2004).

On the other hand, Ramírez Barredo y Guerrero González-Valerio (2025) point out in their article that the speed of commercialization is also supported by the company's databases, which are fed by information obtained from both physical stores and the brand's digital platforms. Through this connection, it is possible to maintain real-time visibility of product availability, thereby avoiding inconsistencies between online and physical inventory. For this reason, the authors emphasize that production should be understood as a support mechanism that strengthens the coherence between key aspects such as customer experience and differentiation in the international market.

It is important to note that, in the case of Zara, its production structure operates through the industrial network of the Inditex group, which includes its own production facilities responsible for strategic stages of the process such as design, fabric cutting, quality control, and the logistical preparation of garments. Activities that require intensive labor, such as garment manufacturing, sewing, or assembly, are outsourced to workshops located in regions close to Spain, for example in Morocco and Turkey (Escalona Orcao & Ramos Pérez, 2014).

### **2.1.5 Supply Chain**

The supply chain of Zara is characterized by its rapid response capability and high inventory turnover, where coordination between design, production, and distribution plays a fundamental role. Through the fast fashion model implemented by the company, this system

allows the reduction of process times that ultimately lead to the arrival of products at the point of sale. In this sector, production cycles are generally short and are managed through a logistics system focused on production flexibility and inventory control (Arimany Serrat et al., 2025).

Regarding the operational dimension, Zara structures its supply chain through three levels: suppliers and manufacturers (upstream), distributors and stores (midstream), and final consumers (downstream). In addition, the company applies a strategy known as delayed design, in which fabrics are acquired first and later dyed and manufactured according to market demand. From a logistics perspective, it should also be considered that all products are sent to the company's main headquarters in Spain for classification and subsequent distribution, either through land or maritime transport, within an approximate period of 48 hours (R. Li et al., 2024).

It is also important to highlight that Zara is capable of bringing a product from the design phase to the store in approximately twenty five days. This capability allows the company to launch around twenty four collections per year and more than five hundred designs each week. By maintaining a limited and carefully controlled production system, the company is able to adjust its products according to market demand. As a result, Zara can maintain low inventory levels while ensuring a constant rotation of products (Ahmad, 2024).

### **2.1.6 Inventory Management**

Zara bases its inventory management on the use of technological systems that help minimize the risk of excess stock or inventory imbalances. The company uses a technology known as POS (point of sale), which is a system designed to organize and record daily transactions, collecting detailed information about the products sold. Based on the data obtained, the information is transmitted to a central system and subsequently to the company's headquarters in Spain. In addition, the company also uses RFID (radio frequency identification), which consists of the application of electronic tags on garments that allow products to be tracked individually. This facilitates real time monitoring of inventory and sales. Through these tools, the company is able to obtain precise information about each product unit, which is differentiated according to model, size, or color (Parashar, 2021).

Chan (2016), states that the use of RFID tags helps reduce human errors in inventory counting and accelerates inventory update processes, since this technology does not require direct visual contact and allows multiple products to be read simultaneously. By having this

data automation capability, the company is able to maintain control between stores and distribution centers. In addition, Zhang (2025) highlights that the adoption of digital technologies in the textile sector allows companies such as Zara not to be limited only to inventory control, but also to use the reported information in a strategic way. By having real time visibility of inventory, the company has the ability to improve replenishment cycles and adaptation processes, which contributes to maintaining the competitiveness of the company, as it allows greater synchronization between supply and demand.

### **2.1.7 Product Turnover**

Product rotation within Zara is a determining component of its business model. The company is able to introduce new designs to the market within an approximate period of two to three weeks, which surpasses some of its competitors that follow the traditional model of the sector, where cycles can extend to six months. With this rotation time, the company has the ability to constantly renew its product portfolio. This also helps reduce the prolonged presence of products in stores and improves the overall flow of merchandise in terms of product inflow and outflow. This capability is complemented by its distribution system, which ensures the delivery of new products to stores twice a week (Ji, 2025; Sajith et al., 2025).

It is important to consider that the speed in introducing new products and the limited availability that characterize the fast fashion model generate significant effects on consumer behavior. As the probability of end-of-season discounts is relatively low and consumers face the risk that the desired product may sell out, the phenomenon known as strategic purchasing tends to decrease. This concept refers to the decision to postpone a purchase while waiting for a future discount. In this context, consumers tend to make purchases immediately, which accelerates the outflow of products from stores and consolidates product rotation as a highly relevant element in the company's performance (Cachon & Swinney, 2010).

### **2.1.8 Delivery Time Optimization**

Zara is able to manufacture, design, distribute, and place new garments in stores within an approximate period of fifteen days. A key element that allows the company to meet these delivery times lies in sending finished products to its main logistics center located in Spain, where each garment is classified, packed, and prepared for dispatch within a maximum time of eight hours. Regarding its international stores, Europe receives merchandise within twenty four hours, the United States within forty eight hours, and countries such as China or Japan

within seventy two hours. These delivery times are possible because the company strategically combines the use of air transport, its own logistics networks, and technological systems that generate real time information (Melisa & Ellitan, 2024).

On the other hand, Yang (2025) points out that the company has invested around one hundred million euros in the construction of a logistics network. This network is underground and extends for approximately two hundred kilometers, connecting the company's headquarters with factories and the distribution center, thereby accelerating the transportation of products once production is completed. It is also important to note that Zara achieves an accuracy rate of 98.9% in relation to its shipments due to its logistics system, which incorporates highly innovative tools and processes that help speed up delivery times.

### **2.1.9 Digital Platform**

Merino-Cajaraville et al. (2022) analyze the strategy used by Zara in relation to its website and examine relevant aspects such as usability and the user navigation experience. Based on this study, the authors indicate that the website incorporates different audiovisual and visual resources that facilitate interaction with the content. Within this platform, navigation mechanisms are implemented such as link identification, the possibility of returning to the previous page, and automatic redirection to the homepage when incorrect links are accessed, aspects that are highly useful in facilitating the management of the website by the customer. Within this context, the authors also evaluate the brand project known as AZ Collection, a collection linked to the metaverse environment through the platform Zepeto and developed in collaboration with the creative group Ader Error. On this page, an introductory video of the project can be observed, after which the content is organized through informational blocks that contain descriptive information and digital looks presented through avatars wearing the garments from the launch, each of which includes a direct link to the online store that allows users to access and purchase these products. The visual design of the website also stands out, as the colors black and blue are mainly used, which are associated with the identity of Zara and Ader Error, while white is also present to improve the readability of the text since the background of the site is dark.

On the other hand, Tőkés, (2022) addresses the website of Zara as one of the main channels that facilitate the brand's digital communication. According to the author, this website functions as a highly relevant point of contact between the company and its consumers, as it allows access to different types of content that combine texts, images, sounds, and other resources that can be explored by each user. In this regard, the digital

platform plays an important role in the company's digital experience, since customers' first impression of Zara is often generated through their interaction within its digital environment.

In relation to technological innovation within the digital platform of this brand, Quinde-Pullutasig et al. (2025) highlight that Zara has incorporated virtual fitting rooms, allowing consumers to visualize different garments and access functions such as fitting room reservations, thereby improving the customer experience within the brand's digital environment. Likewise, Musty et al. (2025) indicate that the company operates e-commerce platforms and mobile applications where customers can enjoy an accessible shopping experience at any time and from any location. Zara integrates within these platforms digital customer service tools such as chatbots and online chat systems, which are directly connected to databases and respond immediately to any questions or assistance required by users.

#### **2.1.10 CRM**

Zara uses its CRM system as a fundamental strategy to manage customer information, with the objective of offering personalized experiences to each of them. The company segments consumers according to their purchase history, location, and other characteristics. Based on this information, customers are later sent specific promotions and recommendations through email or notifications within the brand's mobile application. This system also provides greater support for the customer service area, as employees have access to the necessary information to provide assistance either online or in physical stores (Akujuo, 2024).

According to Shen and Chen (2024), the company uses this data in order to understand purchasing behaviors and consumer preferences. This information collection, which includes aspects such as daily sales, best-selling products, and returns, enables the company to identify consumption patterns and adjust its future decisions according to the reaction of demand in real time.

#### **2.1.11 Digital Marketing and Social Media**

In the field of digital marketing, social media is perceived as a strategic channel within the fashion sector, as it enables the establishment of effective communication with consumers and encourages their participation. According to the study conducted by Alonso González, (2015), Zara stands out for its strong presence on digital platforms and for its large number of followers in comparison with the other companies analyzed in the study.

According to the author, through its digital platforms the company disseminates content related to new collections and brand updates, which helps attract its target audience and strengthens its visibility within the market.

Additionally, the analysis conducted by Barbero Carabias and Antolínez Merchán (2020) indicates that the digital presence of Zara shows greater strength on platforms such as Instagram, where by 2020 the brand's official account had around 40.5 million followers, surpassing the other brands of the Inditex group analyzed in the study. Likewise, the authors show that the brand maintains a well-organized approach to the content it publishes. For example, when presenting new collections or products, its posts usually receive approximately 353 thousand interactions per publication, which demonstrates the reach that Zara maintains within this digital environment.

From the same perspective, Cristófol et al. (2018) discuss the communication strategy applied by Zara on Facebook, a platform on which the brand also maintains constant activity. During the period of July to August 2018 analyzed by the authors, the company published a total of 82 posts, where the predominant use of photographic resources and videos related to the organization's products can be observed. Furthermore, the study reveals that a large portion of its content includes links that redirect users to external pages, which demonstrates the importance that social media has across the company's different digital spaces.

#### **2.1.12 Customer Experience at the Physical Point of Sale**

In this context, the study conducted by López de la Cruz and Clemente Mediavilla (2023), analyzes this experience through research applied specifically in two physical stores of Zara in Madrid. The results of the analysis show that although most Zara consumers are satisfied with their shopping experience, there are negative factors that affect the in store experience. Among the main problems identified by the authors are long waiting times both at the checkout and in fitting rooms, which generate discomfort and affect the flow of the purchasing process. Likewise, some customers express dissatisfaction with the staff, who in certain cases are perceived as unfriendly. Regarding the store environment, the authors point out problems that arise during periods of higher demand, where greater disorder can be observed, there is a shortage of mirrors, and fitting rooms do not always maintain adequate cleanliness. In addition, there is also a perception of price increases that are not associated with improvements in product quality. On the other hand, among the positive aspects, the study highlights the appropriate lighting of the store and the incorporation of tools such as the so called store mode available within the brand's mobile application.

Zara does not base its positioning on the conventional marketing practices commonly used in the sector, Fondevila-Gascón et al. (2024) argue that the company employs neuromarketing and experiential marketing strategies that aim to engage the consumer's senses in order to create a stronger connection with the brand. Through this study, the authors reveal that the physical channel continues to have greater acceptance compared to the digital one, as it allows consumers to interact directly with the products and experience a multisensory environment.

Additionally, the study conducted by Tho (2022) analyzes the quality of service provided to consumers in the physical stores of Zara located in Vietnam. For this research, the author applies the Retail Service Quality Scale (RSQS) model. The results of the analysis show that consumers maintain a positive perception of the service, highlighting aspects such as the physical conditions of the store, store policies, and the company's responsiveness in addressing problems. However, the study also reveals certain weaknesses in the in store experience, particularly in the interaction with store staff, which did not demonstrate a significant relationship with customer satisfaction. This suggests the need to strengthen staff training and customer service in this area.

### **2.1.13 Sustainability**

According to the information presented in the Join Life section of the digital platform of Zara (Zara, n.d.), the company maintains its sustainability strategy with a focus on progressively transforming its production model and reducing the environmental impact generated by its operations within the industry. Within this context, the company has established several environmental commitments related to climate change mitigation, resource management, and the implementation of more responsible production models. Among these goals, the company aims to reduce its emissions by 53% by the year 2030 and expects to reach net zero emissions by 2040. This objective implies a reduction of at least 90% of its carbon footprint compared to the levels recorded in 2018. Likewise, within these commitments, Zara states that by 2030, 100% of its textile fibers will have a lower environmental impact, including recycled fibers, next-generation fibers, or those derived from organic or regenerative agriculture. Additionally, this strategy also includes a focus on the people involved in its supply chain, recognizing the importance of guaranteeing adequate working conditions and promoting the well-being of its collaborators, with the objective of generating a positive impact on more than three million of them. Finally, another relevant aspect highlighted is that the company has created the platform Zara Pre-owned, which aims

to extend the life cycle of garments by allowing them to be repaired, resold, or donated depending on the case.

## **2.2 H&M Case Study**

H&M was founded in 1947 by the Swedish entrepreneur Erling Persson, who opened a small store in Västerås under the name Hennes, which in Swedish means “hers.” The clothing offered in the store was inspired by the American model of affordable women’s fashion. Persson introduced a new concept of accessible fashion to Sweden, aiming to provide local consumers with affordable garments, a concept that has been maintained to the present day. In 1968, the company expanded its segment to include men’s clothing after its founder acquired the hunting and fishing equipment company Mauritz Widforss. Following this acquisition, the company adopted the name Hennes & Mauritz, which is commonly abbreviated as H&M. The success of this business model allowed the company to expand first nationally and later internationally. By 1964, the company had entered markets such as Norway, Denmark, and the United Kingdom, and by the year 2000 it had expanded to New York (Giertz-Mårtenson, 2012).

According to the study conducted by Ullah (2021) the growth of the company, is not only the result of its geographic expansion but also of the implementation of its strategic management, which allowed the company to consolidate its position in the international market. Since its beginnings, the brand has maintained the same concept of offering quality clothing at affordable prices. This approach has been supported by a well-defined organizational structure and constant innovation in basic but necessary aspects of the sector. Through analytical tools such as SWOT, PESTEL, and Porter’s Five Forces, which are examined by the author in this article, it is possible to observe that the success of the company is largely due to its ability to combine different strategies, such as differentiation, in order to adapt to global trends and the changing demands of consumers.

Within H&M, omnichannel strategies are reflected as a key attribute in the company’s organizational and logistics transformation processes. As the company operates stores around the world, its systems have had to adapt in order to respond to the demands of a society that increasingly requires the integration of physical and digital channels. In this context, the company developed a system known as logistics learning capability, which is based on the test and learn approach and helps continuously evaluate its processes across the different environments in which it operates. The authors conducted a study over a period of

18 months and identified four components considered fundamental pillars of this system, which contribute to promoting continuous learning within the organization. Through this approach, the company has replaced traditional methods with processes that enable greater interaction with consumers, allowing it to adapt its supply chain within the omnichannel environment. The authors also highlight the company's omnichannel transformation, emphasizing the significant shift undertaken by the brand, which now prioritizes agile operations and experimentation in order to respond more quickly to changes in the market (Sandberg & Abrahamsson, 2022).

Based on this previous overview of the evolution of H&M, it is possible to identify the way in which the company has developed an approach oriented toward strengthening its competitiveness within the fashion industry. In this regard, it is relevant to examine the omnichannel competitive strategies associated with this organization. The following section analyzes these strategies, considering their most relevant characteristics and importance.

### **2.2.1 Vertical Integration**

In the environment in which the fashion sector operates, vertical integration is interpreted as the level of control that a company has over stages related specifically to production and distribution. In the case of H&M, its model differs from the traditional structure in which manufacturers produce garments and independent retailers sell them. In this context, H&M is responsible for distributing its own brand through its own networks as well as through franchise arrangements (Goebel et al., 2009).

According to the analysis conducted by Petro (2017), the business model of H&M is characterized by a structure in which the company maintains control over strategic activities within its value chain, particularly the design of collections, product planning, and brand management. However, the company is not the direct producer of its garments. According to the author, this structure allows H&M to focus on higher value activities while benefiting from the specialization and production capacity of external manufacturers.

### **2.2.2 Internationalization**

H&M began its international expansion in 1964 with its entry into the Norwegian market, which was characterized by its geographic and cultural proximity to the brand's country of origin. The company experienced a relatively slow expansion, as it took approximately thirty three years, from 1965 to 1998, to establish operations in twelve European countries. Through its entry into these markets, the company gained experience

and knowledge that later facilitated its expansion into more distant and strategically valuable markets. Subsequently, by the year 2000, H&M accelerated its growth by entering markets such as the United States, China, Japan, and several countries in the Middle East (Mo, 2015).

According to the progressive expansión trayectoria demonstrated by H&M, Lee (2019) shows that the company fits within the first type of online internationalization identified in the study. This approach consists of entering international markets first through physical stores and later incorporating digital commerce. Through this analysis, the author explains the company's behavior using the Uppsala Model, since the firm's multinational experience and accumulated market knowledge allow it to assume higher levels of investment with a lower perception of uncertainty or risk. Furthermore, the study highlights the brand identity and operational capabilities of H&M as strong advantages that support the development of market entry strategies with a high level of commitment when expanding into new markets.

At present, this expansion trajectory is reflected in the company's international coverage. According to the information provided on the official website of H&M Group (H&M Group, n.d.), the brand currently operates 3,660 physical stores distributed across 81 markets and also offers e-commerce services in 61 territories. As shown in the regional distribution graphs of the stores, there is a greater concentration in Western Europe, followed by North and South America.

### **2.2.3 Physical Point of Sale**

The point of sale of H&M is integrated within an omnichannel strategy that seeks to provide consumers with a seamless shopping experience across channels. Within this framework, physical stores do not only serve a commercial function but also represent spaces where interaction with customers takes place and where key operational aspects of the brand's strategy are implemented. Another important aspect to highlight is that this brand was the first company within the fast fashion model to implement a used clothing recycling program, an initiative aimed at reducing textile waste. Under this system, stores play a significant role, as customers who visit the store to purchase new garments can also deposit used clothing in containers located inside the establishments, regardless of the brand of the garment (Shao & Lassleben, 2021).

From a different perspective, Pérez-Bou et al. (2021) explain that in the case of H&M, several initiatives have been developed to improve the energy efficiency of its stores through the optimization of lighting, ventilation, heating, and air conditioning systems, with the aim

of reducing energy consumption. Likewise, the interior design of some of its stores incorporates innovations based on the principles of the circular economy, reflected in the use of panels made from recycled textile fibers and other waste materials from the textile industry. Through these actions, the brand demonstrates its commitment to society and sustainability beyond its commercial functions.

#### **2.2.4 Production**

H&M uses an outsourced production system through a global network of suppliers within the fast fashion model. As noted by Arrigo (2018), the company does not own its own factories but relies on independent suppliers, some of which are considered strategic partners. These production partners are located mainly in Asia and Europe and are continuously evaluated in order to ensure production capacity and compliance with the standards required by the company. In addition, H&M also operates production offices in several countries that are responsible for supervising suppliers and verifying that the established organizational requirements are met. From a strategic perspective, this model contributes to guaranteeing productive efficiency, reducing costs, and maintaining the company's competitive presence in the international market.

In relation to the production model of the company, Persson and Mählkvist (2014), explain that companies within the sector, including H&M, tend to orient their production toward regions that offer economic advantages for the industry. The authors indicate that production generally takes place in Asian countries due to lower labor costs, which help companies remain competitive within the market. However, the study also reveals a growing interest among these companies in relocating part of their production to regions closer to their main markets, with the objective of improving their capacity to adapt to changes in societal trends and fashion demand.

Based on the comparative analysis conducted by Benetton and Bafna (2025), the production model of H&M is characterized by a decentralized global manufacturing structure. Instead of concentrating production within its own facilities, H&M coordinates its processes through approximately 1,300 manufacturing suppliers and more than 1,200 companies dedicated to material processing, which results in a division of production stages among specialized actors. Through this multilevel organization, the company is able to maintain relatively high production volumes, which contributes to cost optimization and quality control. The authors' analysis also indicates that a significant portion of this production remains concentrated in countries such as Bangladesh and China, regions that are

highly specialized in the textile industry and have the capacity to sustain the production scale required by the brand.

### **2.2.5 Supply Chain**

The supply chain of H&M is guided by a sustainability-oriented approach that is applied across all stages of the production process. The company implements various practices aimed at reducing the environmental and social impact of its operations. H&M promotes the use of sustainable materials such as organic cotton and recycled fibers, while also considering the labor and environmental standards followed by its suppliers at the international level. In the distribution phase, the brand seeks to use transportation methods that are more efficient and generate lower carbon emissions, such as maritime and railway transport (B. Shen, 2014).

On the other hand, Xuejie et al. (2019) indicate that this company operates through a dual supply chain model in which sourcing strategies are combined in order to reduce costs. The authors explain that basic products are mainly sourced from Asia, where purchasing processes are carried out up to twelve times per year. This approach allows the company to adjust its production more precisely according to changes in demand. Another notable aspect is the use of the ICT platform, which integrates data related to sales, inventories, purchasing plans, and production, enabling continuous monitoring across the different stages of the supply chain.

### **2.2.6 Inventory Management**

In relation to the inventory management of H&M, the company operates through a combination of centralized and decentralized controls. According to Rathore et al. (2019), some activities related to inventory, such as quality inspections and the management of excess merchandise, are administered in a centralized manner. This approach aims to reduce the risk of inconsistencies and maintain control through specialized personnel. At the same time, the company applies a decentralized system, particularly in regional markets, in order to respond more effectively to consumer preferences and needs depending on the context. It is also important to note that this approach contributes to a more efficient management of stock levels. Under this model, stores do not maintain backup inventories, as they depend on a system of continuous replenishment from distribution centers where products are stored. Furthermore, the author indicates that the brand faced challenges related to excess inventory

in 2018, which has encouraged the company to strengthen aspects such as the digitalization of its logistics operations.

Based on the implementation of these digitalization initiatives, López et al. (2022) mention that in 2016 the brand began implementing a digital system based on RFID, which was expanded to 20 countries by 2020. With the support of this technology, H&M is able to accurately locate each garment that is actually available within its inventory.

On the other hand, Arimany Serrat et al. (2025) state that the inventory management of H&M is also directly influenced by the structure of its supply chain and the handling of large volumes of merchandise. Due to its outsourced production network with suppliers mainly located in Asia and Europe, garments are shipped by maritime transport to distribution centers for subsequent allocation. These logistics centers receive approximately 160 million garments daily, which reflects the operational scale of the company in terms of its inventory system.

### **2.2.7 Product Turnover**

Regarding product turnover, this company maintains a strategy based on inventory renewal in order to adapt to market trends. The company launches two main collections per year, which can have an approximate production time of six months. These collections are typically released during spring and autumn and correspond to products that involve a higher level of planning. However, between seasons, the company introduces sub collections with shorter production times, allowing the assortment in stores to be updated more frequently. Under this system, approximately 80% of the inventory is produced in advance, while the remaining 20% corresponds to products manufactured according to emerging trends in the market (Jain et al., 2017).

Furthermore, Jangid (2022), notes that product turnover is closely related to the production and distribution system that the company manages at the global level. According to the supply chain structure of H&M, production is carried out in large volumes of merchandise that must be distributed to a vast network of stores worldwide. However, according to the author's analysis, this production model can make it more difficult for the company to adjust effectively to specific consumer preferences or sudden changes in market demand.

### **2.2.8 Delivery Time Optimization**

The company manages the optimization of its delivery times through centralized coordination and a logistics flow designed to accelerate product availability in stores. Once the production process is completed, garments are sent to technologically equipped distribution centers. However, because stores operate with relatively low inventory levels, the replenishment of merchandise is carried out on a weekly basis. This optimization process is not uniform, as delivery times may vary between three weeks and six months depending on the type of product (Mijušković & Stevanović, 2017).

One limitation faced by H&M is related to its production system. As most of its manufacturing takes place in Asia, the company faces longer delays due to transportation and the time required for logistics processes, which ultimately increases product delivery times. However, given the nature of the sector in which the brand operates, production is largely based on forecasts, which reduces the company's ability to react quickly to changes in consumer demand and preferences. It is estimated that around 80% of the total production volume is manufactured in Asia, and the arrival of products to the required destinations takes at least six to eight weeks. To manage this process, the company operates a distribution network composed of four warehouses located in Sweden, Norway, Poland, and the United Kingdom, which allows it to maintain delivery times between three and five days within Central European countries (Adlarson & Holgersson, 2016).

### **2.2.9 Digital Platform**

The digital platform of H&M makes use of technologies that improve the customer experience and optimize commercial processes within the digital environment. Within this platform, tools such as Artificial Intelligence, Augmented Reality, Virtual Reality, and Big Data are implemented to personalize consumer interaction throughout the purchasing process. In this context, the application of artificial intelligence allows the company to analyze consumer behavior through data obtained from purchase histories and browsing patterns, enabling the generation of targeted product recommendations and supporting decision making. Similarly, the incorporation of augmented and virtual reality technologies facilitates better product visualization for customers, which contributes to greater clarity when making digital purchases. Regarding the use of Big Data, the company is able to process large volumes of information obtained through loyalty programs, product returns,

and purchase transactions. This contributes to improving business performance, as it enables more efficient inventory management and strengthens the integration between physical and digital channels (Rezaei, 2025).

Another relevant aspect of the digital platform of H&M is the implementation of chatbots, which are virtual assistants integrated into its website, mobile application, and social media platforms. These tools are available 24 hours a day and are designed to respond immediately to consumer inquiries related to product availability, order tracking, return policies, or store locations. In addition, the company has developed a chatbot within the messaging platform Kik Messenger, which functions as a virtual assistant that suggests product recommendations based on the needs and preferences expressed by consumers (Pop et al., 2025).

#### **2.2.10 CRM**

H&M implements the use of a CRM system as an initiative aimed at strengthening interaction with consumers, with the objective of improving customer retention and loyalty. This tool allows the company to identify, attract, and maintain new customers, as well as recover former consumers, through strategies based on data analysis and the monitoring of purchasing behaviors. In addition, CRM facilitates active communication that represents the brand, enabling the use of incentives such as discounts or personalized recommendations that contribute to fostering consumer loyalty (Hassan, 2024).

In relation to H&M, Nabhila Setiawan and Sukresna (2023) analyze how several factors related to brand perception influence consumers. This study, conducted with H&M customers located in Jakarta, shows that the identification consumers have with the brand and its image has a positive effect on the level of trust they place in the company. The research also demonstrates that these aspects are closely associated with customer satisfaction, which contributes to the development of brand loyalty. In this way, the findings highlight the importance of strategically managing relationships with consumers, an aspect that is closely linked to the CRM practices implemented by the organization.

#### **2.2.11 Digital Marketing and Social Media**

According to Miranda and Roldán (2023), the digital environment of H&M is considered a key element within its marketing strategy. The company uses social media and e-commerce platforms to maintain a strong relationship with its customers and expand the brand's reach. The authors highlight that the brand maintains an active presence on digital

media, promoting new collections, trends, and campaigns, which allows it to maintain direct contact with the public who receive constant information. In relation to the platform Instagram, the analysis of this study shows that H&M had approximately 24.7 million followers in 2018.

On the other hand, Stephanie and Mutti (2025) highlight that the presence of H&M on social media does not only serve an informational or promotional role, but is also directly related to consumers' purchase intentions. The authors' study reveals the importance of millennials, individuals born between 1980 and 2000, who demonstrate a high level of connection with digital platforms and active interaction on social media. Within this context, factors such as information exchange contribute to maintaining a positive relationship with consumers' purchasing decisions regarding the products offered by H&M. For this reason, social media is perceived as a strategic channel within the company's business model.

Within the digital marketing strategy of H&M, several interesting elements used by the brand can be highlighted. According to the analysis conducted by Pranata (2019) of the advertising short film *A Magical Holiday*, which was released during the 2017 Christmas season by H&M, it can be observed that the company does not always rely on direct advertising. In this case, the products are incorporated into the story through the clothing worn by the characters. However, the campaign seeks to transmit emotions through a message related to the value of sharing during the Christmas season, where the marketing strategy aims to influence the audience's perception in order to encourage the purchase of the brand's products.

#### **2.2.12 Customer Experience at the Physical Point of Sale**

Neaves and Yin (2013) conducted a study focused on the customer experience at the point of sale of H&M, analyzing it from the perspective of sensory aspects and their influence on brand recognition. For this purpose, the authors included the participation of six consumers who visited an H&M store and another fashion store in order to compare their shopping experiences; this activity lasted fifteen minutes in each establishment. Subsequently, the data were complemented with interviews and surveys conducted with 100 participants. The results show that although the design of H&M stores presents a clear layout, adequate lighting, and effective signage, the customer experience is classified as not very memorable because the strategies applied are mainly visual and do not incorporate other sensory stimuli. In this context, consumers perceive that the store environment does not fully convey the brand's identity nor generate a significant connection with the customer.

On the other hand, Regadera González et al. (2022) analyze the case of a flagship store of H&M located in the city of Barcelona, which is considered one of the brand's representative stores. The authors collected data through surveys administered to 72 consumers who responded after completing their visit to the store. The results show that aspects such as the color of the space, lighting, and interaction with staff are factors present within this store that positively influence consumer satisfaction. Likewise, the study identifies certain elements that are considered negative because they do not significantly influence consumer emotions, including aspects such as the music and the location of the establishment.

### **2.2.13 Sustainability**

According to the sustainability report presented by H&M Group (2024), the company seeks to demonstrate that it is possible to maintain a balance between affordable prices, attractive design, and sustainable solutions, promoting a business model aimed at reducing environmental and social impact. Within this framework, the company has established a sustainability agenda focused on several high impact areas such as climate, water use, and land use, among others. These areas guide the company's actions in order to reduce both environmental and social impacts related to its production processes. The company has also established specific targets within its climate commitments, including the goal of reducing greenhouse gas emissions by 56% by the year 2030. Likewise, the organization promotes a circular production model by increasing the use of recycled materials or materials sourced from sustainable origins, which has led to the objective that 100% of the materials used in its products meet these criteria by 2030. In addition, regarding the reduction of water resources, the report indicates that the company has achieved a total reduction of 9.5% within its production processes.

In order to synthesize the level of implementation of the main competitive strategies related to omnichannel practices in the analyzed case study **Table 1** is presented, showing the levels of application of these strategies in both Zara and H&M.

**Table 1***Level of Implementation of Omnichannel Competitive Strategies in Zara and H&M*

<b>Strategy implemented</b>	<b>Zara</b>	<b>H&amp;M</b>
Vertical integration	High	Medium
Internationalization	High	High
Point of sale	High	Medium
Production	High	Medium
Supply chain	High	Medium
Inventory management	High	High
Product turnover	High	Medium
Delivery time optimization	High	Medium
Digital platform	High	High
CRM	High	High
Digital marketing and social media	High	High
Customer experience at the point of sale	Medium	Medium
Sustainability	High	High

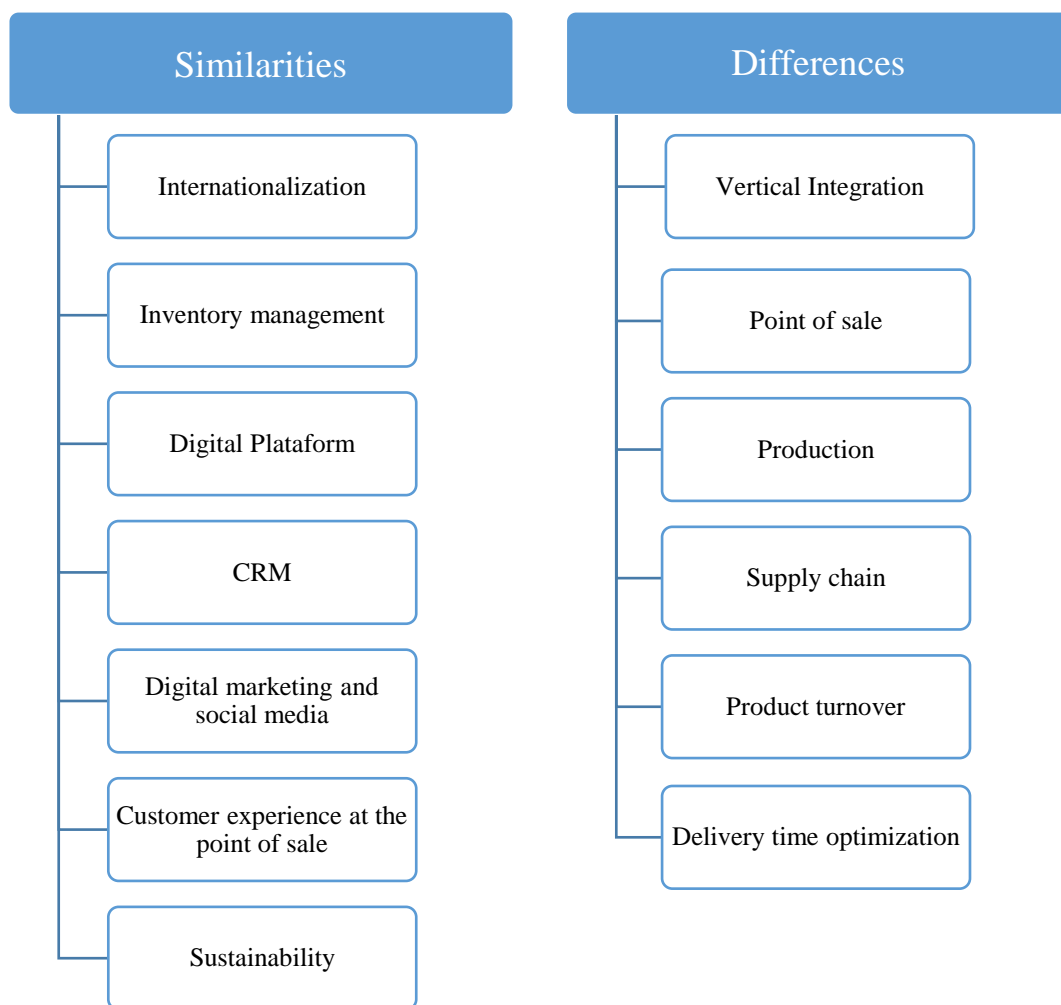
*Note.* Author's own elaboration based on the analysis of secondary sources on the omnichannel strategies implemented by Zara and H&M.

### CHAPTER 3

## COMPARATIVE ANALYSIS OF SIMILARITIES AND DIFFERENCES IN THE OMNICHANNEL MANAGEMENT MODELS OF ZARA AND H&M

Based on the analysis developed in Chapter 2 regarding the omnichannel competitive strategies implemented in the analyzed case studies, **Figure 1** is presented, in which the main similarities and differences identified in relation to the strategies applied by Zara and H&M are illustrated.

**Figure 1**  
*Similarities and Differences in the Omnichannel Competitive Strategies of Zara and H&M*



**Note.** Author's own elaboration based on the analysis of omnichannel competitive strategies implemented by Zara and H&M.

### **3.1 Similarities in the Omnichannel Management Models of Zara and H&M**

Within the omnichannel management models of Zara and H&M, 7 similarities can be identified among the 13 strategies analyzed. Both companies have developed their business models with a focus on the integration of physical and digital channels in order to provide a better shopping experience for consumers and strengthen their positioning within the international market.

First, one of the main similarities identified in the analysis of these brands lies in the high level of internationalization they have achieved so far. Both companies have established a presence in multiple global markets through expansion strategies that have allowed them to position themselves as key references within the textile sector. In the case of Zara, the company demonstrated a global expansion orientation from its early stages due to internal factors within the Spanish market. As a result, the brand currently operates 1,534 stores worldwide as of July 2025, with a strong presence in Asia, America, and Europe, reflecting its strong performance in the international environment. On the other hand, although H&M experienced a slower expansion during its initial years, it gradually acquired experience and market knowledge. This has allowed the company to currently operate 3,660 physical stores distributed across 81 markets, in addition to offering e-commerce services in 61 territories, covering regions such as Western Europe and North and South America. In both cases, this internationalization process has been a determining factor related to their competitiveness and expansion into new markets.

Regarding inventory management, another relevant similarity can be identified between the two case studies, as both present a high level of digitalization that supports their operations. It can be highlighted that both organizations incorporate technological systems for the management and control of stock, with the objective of ensuring greater accuracy in tracking their products within the commercial environment. In this context, these companies make use of tools such as POS (point of sale) systems for transaction registration and RFID (radio frequency identification) technology, which tracks garments individually and facilitates the identification of each product according to its specific characteristics. The implementation of these technologies allows the companies to maintain updated information regarding inventory levels, reducing common human errors and strengthening coordination

between physical stores, distribution centers, and e-commerce platforms. It is important to consider that the use of these systems responds to different operational needs. On the one hand, Zara focuses on optimizing replenishment cycles and adapting efficiently based on demand, while H&M concentrates on the efficient management of the large volumes of merchandise it handles. In both cases, digital inventory systems become a key component within their omnichannel strategies, contributing to strong operational efficiency and ensuring product availability for commercialization.

The use of digital platforms is also reflected in the business models of both companies, as these function as mechanisms for direct interaction with consumers. Both Zara and H&M have developed websites and mobile applications that incorporate various visual and audiovisual resources, as well as navigation tools that facilitate customers' access to product catalogs, information, and purchasing processes in a more efficient manner. Within this context, the digital platforms of both companies operate as interactive spaces where the main objective is to improve the consumer experience and strengthen the relationship with customers through the digital environment. Likewise, another relevant similarity is the incorporation of technological tools such as chatbots, which function as virtual assistants available at any time and capable of providing immediate responses to consumer inquiries.

Similarly, Customer Relationship Management (CRM) represents another relevant similarity between Zara and H&M. Both companies use this system as a mechanism to manage customer information and strengthen customer loyalty. This tool is used to collect and analyze data related to consumer purchasing behavior, including aspects such as purchase histories, preferences, geographic location, and interactions across the brands' channels. Through this information, companies are able to segment their customers in order to develop personalized communication strategies. In addition, by using CRM systems, both companies can understand consumption patterns and demand responses more accurately, which supports decision making and the implementation of strategies focused on customer retention and satisfaction.

On the other hand, within the omnichannel strategies analyzed, digital marketing and social media also emerge as a common element between the two case studies. Based on the information collected, it can be highlighted that both companies integrate these channels as a strategy to position their brand image and maintain constant communication with their audience. Through these digital spaces, the companies disseminate content related to new collections, trends, and campaigns, using visual and audiovisual resources that capture

consumers' attention. Likewise, the studies reviewed show the strong reach that these brands maintain on social media platforms. For example, Zara had approximately 40.5 million followers on Instagram in 2020, while H&M recorded around 24.7 million followers on the same platform in 2018. From this perspective, digital marketing is directly related to the influence that these channels exert on consumer behavior, as they allow constant access to information about the brands. Through this continuous exchange of content, consumers develop greater familiarity with the products offered and with the identity of the companies, factors that can influence their perception of the brands and their interest in purchasing their products.

The sixth similarity identified refers to the customer experience at the point of sale, an aspect in which both brands present a medium level of adaptation. Based on the analysis of the different studies reviewed, it can be observed that the stores of these organizations have adequate physical conditions, highlighting elements such as good lighting and an organized spatial layout. These aspects are considered positive because they facilitate the purchasing process for customers within physical stores. However, the analysis also reveals certain limitations within the commercial spaces of both companies. In the case of Zara, issues related to long waiting times at checkout and fitting rooms, disorder during periods of high demand, a shortage of mirrors, and inadequate customer service have been identified, all of which limit the smoothness of the purchasing process. Similarly, H&M also presents certain characteristics that do not fully generate a positive effect in store experience for customers. This is mainly due to the limited use of sensory stimuli and, in some cases, the location of the stores, which leads studies to suggest that the overall experience may be perceived as less memorable by consumers.

Finally, sustainability also emerges as a shared strategy, reflecting the growing importance currently given to this aspect. According to the studies reviewed, both Zara and H&M have implemented objectives aimed at reducing the environmental impact associated with textile production through measures such as the use of sustainable materials and the implementation of responsible practices within the value chain. It can also be observed that both organizations have developed initiatives related to garment recycling, actions that demonstrate the level of commitment of both companies toward sustainability.

### **3.2 Differences in the Omnichannel Management Models of Zara y H&M**

Although Zara and H&M operate within the same sector and have developed competitive strategies aimed at integrating physical and digital channels, six important

differences can be identified in relation to their omnichannel management models. These differences reflect distinct approaches regarding the organization of their operations and the management of their supply chains.

Vertical integration represents one of the most evident differences between the business models of the two case studies. In the case of Zara, the company demonstrates a high level of vertical integration, which is reflected in its direct control over several key stages including design, production, logistics, and distribution. The company internally produces around 40% of its products and approximately 92% of its stores are directly owned. These aspects facilitate efficient coordination between the different areas of the company and enable a constant flow of information. Likewise, its production model allows about 15% of the collection to be finalized before the beginning of the season, providing the opportunity to make adjustments according to market behavior. In addition, the use of systems such as just in time supports manufacturing processes such as cutting and dyeing, allowing the brand to introduce new products into stores in less than two weeks. In contrast, H&M presents a medium level of integration in this strategy, as it mainly maintains control over specific activities such as design, product planning, and brand management. In this case, production is carried out by external manufacturers. However, this approach allows the company to concentrate on higher value activities while benefiting from the productive specialization of its suppliers.

On the other hand, with regard to production, variations can be observed in the way the two companies organize their production systems. In the case of Zara, the company structures its model to maximize responsiveness to demand variability in the international market. To achieve this objective, the organization distributes its production according to the type of product and demand behavior, concentrating a large part of the manufacturing of its garments in nearby regions such as Europe and Portugal, while products with relatively stable demand are mainly produced in Asia. Through this approach, the brand is able to maintain high levels of flexibility and control, which facilitates frequent store replenishment and reduces response times. Another important aspect is that its production model is based on relatively small production volumes, allowing the company to evaluate the performance of each product in the market before expanding its manufacturing. This approach helps reduce the risk of excess inventory and supports a constant rotation of garments. Likewise, this process is supported by information systems that integrate data from both physical and digital stores, enabling real time visibility of product availability and maintaining

consistency between inventories. Part of this production structure is supported by the industrial network of the Inditex group, which operates its own production facilities responsible for strategic stages of the process. At the same time, activities that require higher levels of labor, such as garment manufacturing and assembly, are outsourced to workshops located in nearby regions such as Morocco and Turkey. In contrast, H&M presents a medium level within this strategy, as its production system is highly outsourced. The company does not own factories but instead manages its production through a global network that includes approximately 1,300 manufacturing suppliers and more than 1,200 companies dedicated to material processing, particularly located in countries such as Bangladesh and China. This system has been adopted due to the lower labor costs in these regions, which allows the company to maintain high production volumes and optimize operational costs. Nevertheless, in order to guarantee company standards, H&M operates supervision offices in different countries that monitor suppliers and oversee production processes.

Regarding the supply chain, different approaches can be identified in the way these two companies organize and coordinate their logistics processes. While Zara prioritizes a structure based on operational speed and high inventory turnover, H&M operates through a decentralized global system where production efficiency and sustainability criteria are emphasized. In the first case, Zara maintains strong coordination between design, production, and distribution, reducing processing times and accelerating the arrival of products to various points of sale. Its supply chain integrates stages ranging from suppliers and manufacturers to final consumers and is complemented by strategies such as delayed design, in which fabrics are acquired and later dyed and manufactured according to demand responses. This logistical organization allows products to be transported to the company's headquarters in Spain, where they are classified and redistributed in approximately 48 hours, enabling garments to move from their conception to store shelves in around 25 days. Through this system, the company is able to launch approximately 24 collections per year and more than 500 designs per week, maintaining low inventory levels and a high rate of product turnover. In contrast, according to the analysis, the supply chain of H&M operates through a global sourcing network that prioritizes sustainability criteria and cost optimization. The company promotes the use of recycled materials and applies both labor and environmental standards to its international suppliers. This approach is reflected in a dual supply chain model in which basic products are mainly sourced from Asia, with purchasing processes carried out up to twelve times per year. This system is supported by

technological tools that integrate information related to sales, inventories, purchasing plans, and production, enabling greater control across the different stages of the logistics process.

Another important difference identified in the analysis of the previous chapter refers to product turnover. On the one hand, Zara presents a high level of product turnover characterized by the rapid introduction of new designs into the market within a considerably short period of time, which can range from two to three weeks. This responsiveness allows the company to continuously renew its product catalog and reduce the prolonged presence of garments in stores. Likewise, the logistics system used by Zara enables new products to be delivered to stores twice a week, maintaining a constant flow of merchandise entering and leaving the stores. In contrast, the product turnover of H&M is considered to be at a medium level, as the renewal of its inventory is linked to longer planning cycles. This system allows the company to launch two main collections per year corresponding to the spring and autumn seasons, which may require approximately six months of production time. However, the company also introduces shorter production cycles for the release of subcollections that help update the assortment available in stores. Under this model, around 80% of the inventory is produced in advance, while the remaining 20% is manufactured according to emerging market trends. It is also important to consider that H&M produces large volumes intended for its extensive global network of stores, which makes its capacity to adapt to specific changes in consumer preferences less flexible compared to Zara.

Furthermore, variations can also be identified in the optimization of delivery times between the two companies. Within the fashion industry, particularly in the fast fashion model to which these brands belong, the speed of product distribution functions as a key element in maintaining a constant rotation of products and adapting them to the needs and preferences of the market. In the case of Zara, its logistics system is characterized by a high level of responsiveness and the centralization of its operations. Thanks to this structure, products can reach stores in Europe in approximately 24 hours, in the United States within 48 hours, and in more distant markets such as China or Japan in around 72 hours, demonstrating the efficiency of its distribution system. In addition, the company has made significant investments in infrastructure, such as the construction of an underground logistics network of approximately 200 kilometers that connects its headquarters with factories and distribution centers. This infrastructure facilitates the rapid transfer of products once the production process is completed. Likewise, this system is complemented by technological innovations that manage information in real time, allowing the company to achieve a

shipping accuracy rate of 98.9%. In contrast, within H&M the optimization of delivery times is more constrained due to its outsourced production model. Once the production process is completed, garments are sent to distribution centers, from which the company coordinates the periodic replenishment of store inventories. However, it is important to note that approximately 80% of the brand's total production volume is manufactured in Asia, which means that transportation times to international markets can take between six and eight weeks, resulting in longer delivery times compared to the model applied by Zara. To manage this logistics system, H&M operates distribution centers located in Sweden, Norway, Poland, and the United Kingdom, which allows the company to maintain delivery times of approximately five to ten days within Central Europe.

The final variation identified between these two management models refers to the point of sale. In the case of Zara, store design is oriented toward creating a shopping experience that influences consumers' perceptions and purchasing behavior. The brand's stores are characterized by visually attractive architecture, spacious layouts, and appropriate lighting, while also incorporating sensory stimuli such as a distinctive fragrance and background music, among others. These elements strengthen the brand's identity and create a more interactive shopping experience. Likewise, the layout of Zara stores is strategically structured to guide consumers more effectively within the establishment, with particular attention given to the placement of fitting rooms, payment points, and departmental signage. In contrast, the points of sale operated by H&M play a significant role in facilitating interaction between the consumer and the brand. Within these establishments, the company aims for stores not to function solely as commercial spaces but also as locations where initiatives related to sustainability are implemented, such as the collection program for used garments. Furthermore, according to the analysis, some H&M stores incorporate practices aimed at improving energy efficiency through optimized systems for lighting, ventilation, heating, and air conditioning, as well as the use of recycled materials in the interior design of certain establishments.

# **CHAPTER 4**

## **IMPACT OF OMNICHANNEL STRATEGIES OF ZARA AND H&M ON CUSTOMER CONNECTION AND DIFFERENTIATION IN A GLOBAL CONTEXT**

### **4.1 Semi-Structured Interview Questionnaire**

In order to measure the impact of omnichannel in relation to customer connection and differentiation in both Zara and H&M, a questionnaire was developed to conduct semi-structured interviews. This tool allows the study of consumer experience across the physical and digital channels of the brands considered as case studies.

The questionnaire began with general questions aimed at identifying the profile of the interviewees, such as their age range, place of residence, and frequency of purchase in both brands. It then included questions focused on the physical stores of Zara and H&M. These questions made it possible to analyze the consumer experience in this channel, considering relevant aspects such as the store environment, organization, product availability, and customer service.

In addition, questions related to the use of digital tools were included, specifically websites and mobile applications. In this section, elements such as ease of use, clarity of information, and functionalities within the online purchasing process were evaluated. Likewise, questions were incorporated regarding the integration of channels and the interaction of consumers with the companies' digital content and social media.

The questionnaire concluded with comparative questions that allow the identification of customers' overall perceptions of these brands based on their value proposition, presence across channels, and elements of differentiation in the market compared to other fashion brands. The questionnaire was presented below, organized according to the topics addressed throughout the research and developed in previous chapters:

- Which age range do you belong to?  
18-25  
26-35  
36-45  
46 or older
- What is your city of residence?

- How often do you buy clothes from Zara?

Frequently  
Occasionally  
Rarely

- How often do you buy clothes from H&M?

Frequently  
Occasionally  
Rarely

- If you have visited Zara or H&M physical stores in other cities or countries, how would you describe your shopping experience in each of these stores?
- How do the design, organization and overall atmosphere of Zara and H&M stores influence your preference for each of these brands?
- In terms of product and size availability, how has your experience been at Zara and H&M stores?
- How would you evaluate customer service in Zara's physical stores and in H&M's stores?
- Have you purchased clothing from these brands through their websites?
- Do you consider the information on the websites (images, prices, sizes) to be clear and sufficient to make a purchase decision?
- Which website features do you consider most useful in the purchasing process?
- Have you used any type of online customer service (web help, support or digital contact) froma Zara or H&M?
- If you have used them, how would you descrube your experience with these digital customer service channels?
- How would you describe your experience shopping online at Zara and H&M?
- How do you evaluate the delivery time of products for both brands?
- Have you used the mobile apps of Zara and H&M?

- What differences do you perceive between both applications, and which one do you consider easier to use?
- Which features of these companies' apps do you find most useful?
- How has your post-purchase experience (exchanges, returns, order tracking) been with Zara and H&M?
- Have you used these brands' digital channels to review products before making a purchase in a physical store?
- In relation to Zara and H&M, which brand do you think integrates its physical and digital channels better? Why?
- Have you used different channels (for example, buying online and picking up in-store) or others?
- Have you seen content or advertising from Zara and H&M on social media such as TikTok, Instagram or Facebook ?
- If you've seen it, how does this content influence your interest in and connection with brands?
- How do you view the relationship between price and quality at Zara and H&M?
- Have you noticed that Zara's and H&M's products or collections change frequently? How does this influence your interest in buying from these brands?
- If you had to choose between Zara and H&M, which would you prefer and what aspects do you consider differentiate it from the other brand?
- In your opinión, what aspects make Zara and H&M different from other fashion brands ?

## 4.2 Results and Analysis

In relation to the structure of the questionnaire presented in the previous section, it is applied as the main tool for conducting 20 semi-structured interviews aimed specifically at consumers of Zara and H&M, residents of the city of Cuenca, Ecuador. These participants fall within an age range from 18 to over 46 years old. Regarding purchase frequency, in the case of Zara, 60% of the interviewees make purchases occasionally, 25% do so frequently, and 15% rarely; while for H&M, 45% make purchases occasionally, 30% frequently, and 25% rarely.

Based on the results obtained, this section presents the analysis according to six categories derived from the applied questionnaire. These are organized to facilitate a clearer interpretation of the information collected, in line with the characteristics and strategies analyzed in the previous chapters.

#### **4.2.1 Shopping Experience in the Physical Channel**

This section analyzes consumers' perceptions based on their shopping experience in the physical stores of Zara and H&M, considering aspects such as the overall shopping experience, store design, organization, and atmosphere, as well as product and size availability, followed by customer service. It is important to note that, based on the results obtained, the experience in the physical channel of these companies is generally viewed positively by the interviewees; however, the responses also show significant differences between both brands.

##### **Zara**

In the case of Zara, most interviewees highlight that the brand's stores have a clear and well-organized layout, which makes it easier to locate products and move through the space. In addition, they point out the elegance, modern style, and simplicity of the stores, as well as their architectural design, lighting, and visual presentation of the products. A recurring aspect in consumers' perceptions is the brand's distinctive fragrance, which is consistently recognized, and in some cases, they mention that this scent remains on the garments. Likewise, they indicate that the organization, cleanliness, and presentation of the space are factors that increase their interest in entering these stores.

Regarding product and size availability, it is evident that most participants generally find what they are looking for, highlighting the variety of products; however, it is also mentioned that trending items are not always available in physical stores, and sizing may vary depending on the design and material. On the other hand, some participants state that during sale periods, these stores can become disorganized, which affects the shopping experience, and for some, this encourages a preference for shopping online. In terms of customer service, perceptions vary, as some interviewees report having received assistance during their purchase process and value the speed of service, while others mention a limited presence of staff or service that is not consistent. Finally, it is important to highlight the use of digital tools such as self-checkout, which helps speed up the purchasing process.

## **H&M**

Regarding the shopping experience in H&M stores, interviewees indicate that these spaces are mainly characterized by being large, with a wide variety of products and multiple well-marked sections. However, these aspects are also identified as negative, as some participants report a high repetition of items and a lack of order within the stores. These situations tend to intensify during high-demand periods, such as sale seasons, where participants mention that the shopping experience becomes uncomfortable, making it difficult to find products and even limiting the completion of the purchase process.

Regarding the physical aspects of these stores, participants indicate that they perceive H&M as a brand that reflects a more casual and accessible style; however, they point out that there is no distinctive element within these spaces. In addition, although customer service stands out for the friendliness of the staff, some issues are also identified based on participants' experiences, as they emphasize a limited number of staff, a lack of consistent assistance, and, in some cases, unclear responses.

In terms of product and size availability, interviewees mention that they generally find what they are looking for and highlight variety as one of the company's main attributes; however, some also point out variations in sizing and the mass production of products, aspects that do not create a sense of exclusivity.

### **4.2.2 Shopping Experience in Digital Channels**

This section presents the data obtained from consumers' responses regarding their experience in the digital channels of Zara and H&M, considering key elements such as the use of their websites, the quality of the information provided, the available functionalities, online customer service, as well as the use and development of their mobile applications.

Based on the results obtained from the semi-structured interviews, it is evident that both digital channels play an important role in the purchasing process, as they allow consumers to access the products offered by the brands in a faster and easier way. However, certain aspects are also identified that limit the smooth development of the purchasing process through these digital tools.

## **Zara**

Regarding the information collected, the shopping experience in Zara's digital channels is viewed positively by a large number of interviewees, who mainly highlight the

functionality and ease of use of its website. As observed, participants indicate that the purchasing process on this platform is clear, organized, and simple, allowing for a smooth interaction from product search to payment completion. The information available on this digital platform is considered sufficient for decision-making; one of the most relevant aspects identified is the perception of greater precision and detail in the visual presentation and organization of products. Some consumers point out that the images used by the brand are specific, clear, and complete, which improves the visualization of each garment. Likewise, some interviewees mention that this platform allows them to analyze products in greater detail before making a purchase, thus reinforcing trust in the digital process.

Likewise, some functionalities within this digital platform are identified as contributing to a better customer experience, such as search filters, catalog organization, and recommendations. In some cases, interviewees also highlight the usefulness of the size guide and the option to check detailed measurements for each garment, which provides a more complete reference when selecting a product. In addition, other elements are mentioned, such as the identification of available colors and the possibility of directly accessing what the consumer is looking for through the use of filters.

However, despite these tools, certain shortcomings are evident in the digital channel. In this context, one of the main issues mentioned is related to variability in sizing, as some interviewees indicate that sizes may change depending on the material of the garment, creating uncertainty when making online purchases. Likewise, some problems are reported regarding product availability and reservation until the purchase is completed, as well as difficulties in the return process and longer delivery times.

Regarding online customer service, the availability of chatbots is highlighted, as they are useful for obtaining immediate responses and facilitating direct contact during the purchasing process. In addition, it is mentioned that Zara provides the option to contact an advisor when more specific assistance is needed; however, some participants indicate that this communication may be interrupted if there is no quick response or interaction, which limits the continuity of this digital support.

On the other hand, Zara's mobile application shows a high level of use among consumers and is perceived as a practical tool, as it allows them to stay logged in, access products more quickly, and track their orders. Likewise, features such as notifications and filters are mentioned as elements that help optimize the shopping experience in the digital

environment. In addition, some interviewees indicate that they use the app exclusively to make purchases, as they consider it more direct and easier to use compared to the website.

## **H&M**

Based on the data obtained, the shopping experience in H&M's digital channels is characterized by the ease and smoothness of the purchasing process. Participants indicate that the brand's website allows them to select products, view sizes, and complete payment quickly and without interruptions, thus contributing to an efficient interaction throughout the entire process.

Although the information available on this platform is considered sufficient for online purchases, certain limitations are identified, as some consumers mention that the images used by the brand are not very detailed or appealing, which reduces the overall visualization of the products. In addition, they indicate that both sizing and product descriptions could be improved, as in some cases they do not accurately reflect the characteristics of the garments. Likewise, some functionalities within this digital platform are identified as facilitating the user experience, such as search filters, catalog organization, product availability, and payment options.

This information also highlights another negative aspect, as interviewees identify issues related to differences between the products available on the website and those found in the brand's physical stores. In addition, in one specific case, a participant reported being unable to complete a purchase due to a problem with the payment process, which affected the consumer's experience. Likewise, some participants refer to the differences between the products available in Ecuador and those offered in other countries, directly influencing their perception of the brand's offering.

Regarding digital customer service, the presence of chatbots available in the help sections of the platform stands out. However, some interviewees mention that in specific situations they were unable to obtain a satisfactory solution to their problems, particularly in cases related to payments, highlighting the limitations in the responsiveness of this tool. Despite this, it is recognized that these systems allow users to receive instant responses to general inquiries, facilitating initial interaction with the user.

On the other hand, H&M's mobile application shows a lower level of use compared to Zara's. This is because some participants do not use the app and were even unaware of its existence, with a preference for purchasing directly through the website. Among those who

have used this tool, different perceptions are identified: on the one hand, it is recognized that the app allows access to products, the use of filters, and order tracking; on the other hand, some participants mention issues related to its performance, such as slowness, frequent updates, and technical problems within the app, which affect the overall experience in this digital channel.

Finally, a positive aspect highlighted by some participants is the speed of delivery times, as well as favorable experiences in the return process; in some cases, it is even mentioned that the brand covers shipping costs. In this context, although H&M's digital channels are perceived positively in terms of the purchasing process, there are also areas where improvements can be made.

#### **4.2.3 Channel Integration**

This section analyzes the integration of physical and digital channels based on the interviewees' responses. Its purpose is to measure and understand how consumers apply omnichannel strategies within their purchasing process in Zara and H&M. To do so, several aspects are considered, including the combination of channels, the use of digital tools as support during in-store purchases, and the consistency that brands maintain in their connection with consumers.

After analyzing the collected results, it is evident that the integration between physical and digital channels in both Zara and H&M is not a widespread practice among the interviewees. From this perspective, around 60% of participants state that they do not combine both channels in their purchasing process; many of them indicate that their experience takes place exclusively within a single channel, either digital or physical. This limited integration is largely influenced by the absence of physical stores of these brands in the city of Cuenca, Ecuador, which restricts the consistent use and experience of omnichannel strategies.

However, it is identified that approximately the remaining 40% have made use of this strategy. In these cases, consumers describe practices such as reviewing products on digital platforms before visiting physical stores. These tools are valued positively, as they help save time, facilitate decision-making, and provide more information about products at the time of purchase. However, it is important to note that not all interviewees who use this channel integration specify a particular brand when describing these experiences.

In order to identify the specific differences between both brands, interviewees were asked: “*In relation to Zara and H&M, which brand do you think better integrates its physical and digital channels? Why?*” Based on this question, different perceptions emerge regarding how each brand manages channel integration, which are analyzed below.

### **Zara**

In the case of Zara, interviewees identify it as the brand that shows better integration between its physical and digital channels, mainly highlighting the consistency between the products available on its website, social media, and physical stores. Several participants point out that the content they see from this brand on digital platforms is also available in its physical stores, which facilitates product identification and creates a more integrated experience.

In addition, they indicate that Zara offers simpler purchasing processes, which incorporate technological systems that improve the user experience and speed. In this sense, some interviewees mention the presence of digital tools within the stores, as well as the ease of the purchasing process. These aspects contribute to a smoother interaction between channels.

### **H&M**

For its part, H&M is valued for its presence across different digital platforms and its consistent communication. This perception shows that the brand’s channel integration follows a more functional approach, where participants highlight aspects such as the availability and accessibility of information and the products offered across its channels.

Additionally, interviewees highlight that H&M has well-organized digital processes, especially in areas related to shipping and communication. This is particularly important, as it builds trust within the purchasing process. They also mention its international presence and the ease of finding H&M stores in different countries.

## **4.2.4 Social Media Presence**

This section analyzes consumers’ perceptions regarding the social media presence of Zara and H&M, as well as the influence these digital channels have on their interest in and connection with these brands.

In general, the results show that both companies have an active presence on social media, with Instagram being the most relevant and most mentioned platform by participants.

Regarding the influence of this content, the responses indicate that social media plays an important role in consumer behavior. Several interviewees state that the digital advertising of these brands directly influences their interest, especially when new items are presented; according to them, this motivates them to search for more information about the products and, in most cases, leads to a purchase.

In particular, the impact of content on platforms such as TikTok stands out, as the way garments are presented through real experiences generates greater attraction and, in some cases, a sense of need. However, some responses reflect more critical perceptions, as certain participants consider that the advertising can become repetitive or less relevant, reducing its effectiveness and level of interest.

### **Zara**

Based on the data obtained from the semi-structured interviews, Zara's presence on social media is mainly perceived through Instagram, followed by TikTok and Facebook. However, the frequency of content exposure varies, as some participants indicate that they see it constantly across all platforms, while others report having seen little content from the brand or not recalling any recent advertising.

This variability may indicate that Zara's digital presence does not consolidate uniformly across all segments, as although there is brand recognition on social media, its content does not always create a lasting impression in consumers' minds.

### **H&M**

In the case of H&M, interviewees identify a stronger presence of this brand on social media, with Instagram again standing out as the platform with the highest visibility. Unlike Zara, several participants agree that H&M's content appears more frequently. They also mention platforms such as Facebook, TikTok, and even YouTube, reinforcing the perception of a much more active digital presence.

According to consumer perceptions, this higher frequency generates a stronger influence in terms of the brand's presence in consumers' minds. Interviewees associate H&M with a more constant presence, thus increasing the likelihood of capturing their attention. Despite this, some cases of limited exposure are also identified, although these are less frequently mentioned compared to the previously analyzed brand.

#### **4.2.5 Perceived Value**

This section examines consumers' perceived value in relation to Zara and H&M, mainly considering the relationship between price and quality, as well as the influence of product turnover for each brand.

##### **Zara**

The relationship between price and quality for this company is generally viewed positively, although not by all interviewees. Several participants agree that the brand's prices are justified based on the quality of the garments, noting that they tend to be durable and can remain in good condition for several years. This reinforces the positive perception that consumers have of the company.

However, although these views are less frequent, some negative opinions are also identified, where it is mentioned that Zara's quality has decreased compared to previous collections and years, creating discomfort as prices remain the same. In addition, participants highlight that the relationship between price and quality largely depends on the type of garment, as some meet consumer expectations and match their cost, while others do not reach the same level. Despite this, the brand maintains relatively high prices, and the perceived value remains positive for most consumers.

Regarding interviewees' perceptions of product turnover, it is identified as frequent. Consumers indicate that Zara introduces new collections continuously, which encourages more impulsive purchase decisions due to the possibility that products may sell out quickly. This constant renewal strengthens the brand's perceived value, as it is associated with current trends; however, some concerns are also raised regarding the consistency of quality, as the priority on continuous renewal may affect the durability of some garments.

##### **H&M**

On the other hand, H&M's perceived value is linked to the accessibility of its prices. A large number of participants agree that the brand offers affordable products, which reflect the quality of the garments. In this case, the relationship between price and quality is perceived as consistent, as consumers consider that, given the lower prices, the quality offered is appropriate, although lower when compared to Zara.

From the responses, it can be identified that this company stands out as a suitable brand for purchasing basic garments, where its value is not focused on durability, but on

functionality and price. Although some negative aspects are mentioned, such as issues with garment resistance or changes in shape after washing, the low cost compensates for these weaknesses. For this reason, an overall positive evaluation is maintained.

Regarding product turnover, interviewees recognize that H&M also shows a continuous renewal of its collections, although to a lesser extent compared to Zara. Participants indicate that the brand offers variety and frequent product updates, allowing consumers to access different options and styles according to the seasons.

However, it is evident that the level of renewal applied by H&M does not generate the same urgency or purchase impulse as in the case of Zara, as the information collected does not reflect such a rapid product turnover for this brand. In this sense, although H&M's product updates help maintain consumer interest to some extent, their impact on perceived value is moderate and is valued mainly for the variety offered rather than for a sense of exclusivity.

#### **4.2.6 Differentiation**

This section analyzes consumers' responses regarding the elements that differentiate Zara and H&M from other fashion brands, as well as the characteristics that influence their choice between both companies. Based on the data obtained, key factors are identified, such as brand positioning, style, quality, prices, and accessibility, among others. These factors help to understand how these companies stand out in the textile sector.

In general, interviewees agree that both Zara and H&M stand out due to their global recognition, their presence in multiple markets, and their ability to adapt to consumer demand. Likewise, they highlight the variety of products, the constant innovation of collections, and accessibility through digital channels, especially in cities such as Cuenca, Ecuador, where there are no nearby physical stores. Another aspect they emphasize is marketing, which, together with the use of social media and other digital platforms, allows these brands to maintain a constant connection with their customers.

##### **Zara**

Consumers indicate that this company is associated with aspects such as quality, elegance, and exclusivity. It is noted that its garments present a more refined and formal style, which creates a clear differentiation from other fashion brands. In addition, several interviewees mention that, although Zara has higher prices, these are justified by the

durability of the garments and the overall shopping experience, which includes details such as product presentation and careful packaging.

It also highlights the ability to offer a wide variety of options and materials, as well as an in-store experience that conveys satisfaction. In this context, the brand is perceived positively due to its focus on design and perceived value, targeting consumers who seek a more elegant and distinctive image.

## **H&M**

From the data obtained, it is evident that H&M is perceived as a more accessible brand, with interviewees highlighting that its products are aimed at a broader audience. Its main differentiation lies in the variety of options at lower prices, allowing consumers to purchase more products. In addition, the speed of delivery and the ease of purchasing through digital channels are mentioned, further reinforcing its accessibility.

However, although the quality is considered good, some participants perceive it as lower compared to Zara, which varies depending on each consumer's priorities.

Based on the analysis developed across the six categories presented in this chapter, it is identified that consumers' perceptions reveal significant differences in the way Zara and H&M build their value proposition and positioning within the global market.

In order to synthesize these findings and facilitate their interpretation, **Table 2** is presented below, summarizing the main data identified within each of the analyzed categories and allowing for a clear view of the elements that contribute to the connection and differentiation of both brands according to consumers' perspectives.

**Table 2***Comparison of Consumer Perceptions of Zara and H&M by Analysis Category*

<b>Category</b>	<b>Zara</b>	<b>H&amp;M</b>
<b>Shopping experience in the physical channel</b>	Well-organized, modern, and sensory stores that create a more attractive shopping experience.	Spacious and accessible stores, but with less differentiation and a higher level of disorganization.
<b>Shooping experience in digital channels</b>	Visually attractive and detailed platforms, with high functionality in the purchasing process.	Smooth and fast online shopping experience, but with less visual detail and inconsistencies in the information.
<b>Channel integration</b>	Consistency between digital and physical channels, facilitating an integrated omnichannel experience.	Functional integration based on accessibility, but less aligned across channels.
<b>Social media presence</b>	Relevant presence, but less consistent in the consumer's mind.	Higher frequency and visibility, generating more touchpoints with the brand.
<b>Perceived value</b>	Higher prices, but justified by quality, design, and constant product turnover.	Affordable prices aligned with product quality, prioritizing functionality over durability.
<b>Differentiation</b>	Brand associated with exclusivity, elegance, and higher perceived quality.	Focused on accessibility, variety, and mass consumption.

*Note.* Own elaboration based on the analysis of results obtained through semi-structured interviews.

In summary, the results show that, although Zara and H&M share a similar implementation of omnichannel strategies, these are developed under different approaches that directly influence consumer perception. On the one hand, Zara consolidates a value proposition based on channel integration, quality, and an integrated shopping experience. On the other hand, H&M stands out due to its product variety, accessibility, and stronger presence in digital media.

## CONCLUSIONS

Based on the development of this thesis, it is evident that omnichannel has become a highly relevant strategy in the textile sector, as it enables the integration of physical and digital channels with the aim of improving the customer experience and strengthening brand positioning in the international market.

From the theoretical perspective developed through secondary sources, it is established that omnichannel does not only represent the presence of companies across multiple channels, but rather refers to their integration in order to generate a unified experience for consumers. In this context, the relationship between this strategy and competitive advantage and differentiation makes it possible to understand that companies that successfully coordinate their processes, resources, and channels can create greater added value and adapt more effectively to changes in the business environment. Likewise, the analysis of other brands in the textile sector shows that this strategy has become a key factor, due to the evolution of consumer behavior and the increasing digitalization of purchasing processes.

Regarding the analysis of the case studies, it is identified that both Zara and H&M implement omnichannel strategies in their business models; however, they do so under different approaches. On the one hand, Zara shows a high level of integration in its processes, standing out in aspects such as vertical integration, supply chain management, and constant product turnover. On the other hand, H&M adopts a model oriented toward outsourcing, as the company tends to prioritize costs, accessibility, and large-scale production. These structural differences show that, although both brands apply omnichannel strategies, their impact depends on how each organization manages its operations.

From the comparative analysis, it is determined that there are relevant similarities between these two brands, such as their high level of internationalization, the use of technological tools for inventory management, and digital marketing strategies on social media. However, the main differences lie in the structure of their supply chains, production, product turnover, and delivery times; aspects that influence their ability to adapt to the market.

On the other hand, the results obtained through the semi-structured interviews show that consumers' perceptions do not always align with the strategies implemented by the companies. In this sense, it is identified that channel integration is not a common practice among interviewees, as a significant portion tends to use only one channel within their

purchasing process. This behavior is influenced by relevant factors, such as the absence of physical stores in the city of Cuenca, Ecuador, where these consumers reside.

Regarding participants' experiences, Zara is perceived as a brand that offers greater interaction between its channels, as well as a value proposition based on quality, design, and the shopping experience. In contrast, H&M is positioned as a brand that provides greater accessibility, where product variety, lower prices, and a stronger presence in digital media stand out. These perceptions reflect how omnichannel strategies influence the construction of brand value and differentiation within the market.

Finally, it is determined that the analysis of the textile sector, through the case studies of Zara and H&M, shows that omnichannel has been incorporated by both companies as a competitive strategy focused on strengthening customer connection and generating differentiation within the international market. However, this study also demonstrates that its contribution does not lie solely in channel integration, but in the way this integration is linked to each company's management model, thus responding to their operational capabilities and strategic approach within the sector.

In this sense, the analysis developed throughout this thesis establishes that omnichannel does not constitute a uniform strategy in terms of its impact; rather, it depends on the consistency between each company's management model and the way its internal processes are coordinated. Based on the two cases studied, it is identified that true differentiation does not lie solely in the presence or integration of channels, but in the organizations' ability to transform this integration into a consistent experience aligned with their value proposition. Likewise, a significant gap is observed between the strategic implementation of omnichannel and its application in the context of consumers, which is closely linked to contextual factors such as the geographical environment and purchasing behavior, both of which directly influence its reach in the market. In this way, the general objective of this research is fulfilled, demonstrating that omnichannel, beyond being an operational tool, constitutes a competitive strategy whose effectiveness depends on its integration with the management model and its capacity to generate connection and differentiation in the international market.

## **RECOMMENDATIONS**

Based on the results obtained in this thesis, it is recommended that future researchers continue developing studies related to omnichannel strategies in other industrial sectors, in order to expand the analysis of this strategy across different business environments. This will be useful for comparing its impact on various types of companies according to their evolution and development over time. In addition, it is suggested to further explore omnichannel as a key factor in achieving business competitiveness in the global market. It is important to consider the aspects analyzed in this thesis, such as customer experience, operational efficiency, and brand positioning. In this context, incorporating complementary approaches would be useful to more effectively evaluate its impact and results in business development.

Likewise, companies are recommended to consider omnichannel as part of their strategies, taking into account its focus on the integration of physical and digital channels. It is also useful to monitor their internal processes in order to effectively implement these strategies and achieve the expected results. In addition, it is important not to overlook the allocation of specific resources for the development and implementation of omnichannel strategies, as this requires both technological investment and improvements in operational processes.

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## APPENDICES

### Appendix A

*Number of Interviewees by Age Range*

Rango de edad	Número de entrevistados	Porcentaje
18-25	11	55%
26-35	1	5%
36-45	2	10%
46 o más	6	30%
<b>Total</b>	<b>20</b>	<b>100%</b>

### Appendix B

*Number of Interviewees by City*

Ciudad	Número de entrevistados	Porcentaje
Cuenca, Ecuador	20	100%
<b>Total</b>	<b>20</b>	<b>100%</b>

### Appendix C

*Number of Interviewees by Purchase Frequency in Zara and H&M*

	Zara		H&M	
	Número de entrevistados	Porcentaje	Número de entrevistados	Porcentaje
Frecuentemente	5	25%	6	30%
Ocasionalmente	12	60%	9	45%
Rara vez	3	15%	5	25%
<b>Total</b>	<b>20</b>	<b>100%</b>	<b>20</b>	<b>100%</b>

## Appendix D

### *Shopping Experience in Zara Stores*

#### **Experiencia en tienda (Zara)**

- Buena experiencia, bien organizadas las secciones. Zara más organizada.
  - Buena experiencia. Mayor preferencia por los locales de Zara porque tiene su aroma característico que transmite frescura, clásica en todos sus locales que ha comprado alrededor del mundo.
  - Buena experiencia, tienes varias opciones para elegir. Las tiendas te transmiten elegancia.
  - Buena.
  - Destaca su diseño y los maniqués.
  - Excelente, sus locales son llamativos y siempre se ubican en las calles más representativas de moda en los países internacionales. Su fragancia exclusiva se percibe siempre y es algo que se queda incluso en las prendas.
  - Las frecuenta más ya que son más organizadas. Destaca la forma en la que exhiben los productos y el olor de las tiendas.
  - Le gusta más esta marca por su aspecto físico, ropa, calidad. Tiene una mejor organización.
  - Le ha ido bien. Destaca la elegancia que transmiten las tiendas y los colores que usan. Tiene una fragancia representativa.
  - Muy buena clasificación e iluminación.
  - Muy buena, el ambiente, la distribución de los productos y su buena presentación le gusta mucho.
  - Muy buena, establecimiento modernos y su fragancia es deliciosa.
  - Muy buena, le han guiado siempre en el proceso de compra. Destaca la tecnología que tienen para poder hacer atropagos.
  - Muy buena. Destaca el diseño y la iluminación.
  - Organización bien marcada.
  - Prefiere comprar en línea porque las tiendas son muy desordenadas cuando hay rebajas.
  - Satisfactoria. Zara es más ordenada y su ambiente es más sobrio.
  - Son tiendas amplias con mucha variedad de estilos y opciones de ropa. Zara está más organizada y al momento de pagar es mucho más rápido. La distribución es muy buena y se percibe como una marca más elegante y costosa.
  - Son tiendas grandes con gran variedad. En otros países la calidad de la ropa es distinta a la que se vende en Ecuador. Zara siempre tiene tiendas más elegantes y formales.
  - Variedad de ropa y colores sobrios dentro de las tiendas.
-

## Appendix E

### *Shopping Experience in H&M Stores*

#### Experiencia en tienda (H&M)

- Bien organizadas y el espacio es amplio.
  - Bien pero al menos en las tiendas que ha visitado muchas de las veces no ha podido comprar por el desorden y la cantidad de gente.
  - Bien presentados pero es mas masivo.
  - Buena experiencia pero hay muchos productos de los mismos.
  - Buena experiencia pero no tiene algo que le marque un recuerdo al local.
  - Buena experiencia, tiene sección de descuentos pero no son muy organizados. Su estilo es mas juvenil y accesible.
  - Buena pero hay mucha cantidad de productos.
  - Buena, sin embargo la tienda es desorganizada en las ciudades que ha visitado.
  - Buena. Son organizadas y tienen varias secciones bien señalizadas.
  - La organización de las tiendas es mala ya que tienen muchos productos de los mismos y se ve de una calidad inferior.
  - Muy buena, le han guiado siempre en el proceso de compra. Muchas filas y demora en temporadas altas.
  - Muy buena, sus tiendas son grandes y van de acuerdo a las características del país en el que están.
  - No ha ido.
  - No le gusta ir a estas tiendas por el desorden que tienen. Considera que es para consumo masivo.
  - No son muy atractivas. Son demasiado grandes y no llegas a ver todos los productos que tienen ya que por ejemplo cuando tienen mas de dos pisos ya ni sube.
  - Organización bien marcada pero son tiendas muy grandes que no llegas a recorrer todo.
  - Organización y letrero llamativo.
  - Satisfactoria. Pero demasiado color rojo que te llega a cansar si estas mucho tiempo.
  - Son tiendas grandes con gran variedad. En otros países la calidad de la ropa es distinta a la que se vende en Ecuador.
  - Sus locales son grandes sin embargo tienen mayor desorden y las prendas se repiten mucho.
-

## Appendix F

### *Influence of Store Design, Organization, and Atmosphere in Physical Stores*

#### **Influencia del diseño, organización y ambiente**

- Bastante ya que transmiten limpieza y hace que quiera comprar la ropa porque se refleja que es de buena calidad.
  - En Zara influye mucho ya que es un ambiente mas elegante y sofisticado que genera una mayor atención, mientras que la otra es mucho mas casual.
  - Es algo muy importante ya que son marcas accesibles. Pero al sentirte en un espacio mas confortable como las tiendas de Zara te impulsa a querer comprar mas. HM es mas masivo por lo tanto no se puede apreciar mucho cada una de las prendas y no arreglan regularmente las prendas.
  - Influye bastante en el proceso de compra.
  - Influye bastante porque la organización de las tiendas le ayuda a escoger y ver directamente lo que necesita.
  - Influye bastante ya que eso es lo que te genera el interés por entrar a comprar.
  - Influye bastante. Zara tiene una mejor distribución, H&M es un poco mas desorganizado. Siente que los dos establecimientos reflejan un ambiente lindo y sobretodo limpio que atrae para comprar.
  - Influye mucho la parte visual que tienes desde un inicio.
  - Influye mucho ya que lo que uno ve es lo que consume. Si esta bien organizado como es el caso de estas marcas, eso le da mas valor a las prendas.
  - Influye mucho, estos aspectos son los que le dan mayor valor en caso de las tiendas de Zara ya que en HM se puede ver mayor desorganización y las prendas en muchos de los casos no se encuentran facilmente.
  - La organización de Zara y el diseño arquitectónico es elegante y de acuerdo a su mercado. H&M tiene un diseño mas casual ya que venden ese estilo de ropa.
  - Mucho porque jamás compraría en una tienda desordenada y también es importante que se mantenga un orden en las tallas y personal que le ayude con lo que necesita.
  - Si influye ya que puedes encontrar de mejor manera lo que buscas y no demorarte tanto. Motivo por el cual compra mas en Zara.
  - Si influye, considera que las dos marcas son similares y que hacen que quieras comprar.
  - Si influye, sobre todo los anuncios llamativos de colores de la parte exterior.
  - Tiene mucha influencia porque a primera vista ya sea inconcientemente busca Zara en el lugar que se encuentre por su buena presentación.
  - Tiene mucha influencia, cuando compra en Zara o HM siente que esta comprando productos de calidad.
  - Tiene mucha influencia, y es por esta razón que prefiere las tiendas de Zara.
  - Variedad en diseño de las tiendas de Zara. Destaca la buena organización de las dos tiendas y tienen diferentes opciones.
-

## Appendix G

### *Product and Size Availability in Zara*

#### **Disponibilidad de productos y tallas (Zara)**

- Bien, siempre ha encontrado lo que busca.
- Bien. En ocasiones no se encuentran los productos en tendencia y le toca reservar a que le llamen cuando llegue.
- Buena experiencia porque siempre encuentra los productos y tallas que necesita.
- Buena experiencia, amplia variedad en diseños. Pero las prendas de tendencia no siempre se encuentran.
- Cambian el tallaje de acuerdo al diseño.
- Cuando una prenda esta en tendencia no se encuentra con facilidad y las tallas varían mucho.
- Disponibilidad de su talla es reducida.
- En las dos bien, siempre encuentra las tallas que busca y si no están en tiendas hay en las páginas digitales.
- Las tallas no siempre son como las indican.
- Menos tallas pero los productos son mas exclusivos.
- Muy pocas veces no ha encontrado la talla que necesita.
- No ha tenido ningún problema siempre encuentra distintos productos y las tallas estan bien.
- Percibe una mayor demanda y por eso en algunas ocasiones no ha logrado conseguir las prendas en ese momento pero si ha conseguido en línea u otro local.
- Siempre encuentra las tallas.
- Siempre encuentra varios productos que le llaman la atención.
- Siempre hay los productos y tallas que busca.
- Siempre hay mas disponibilidad online y sobre todo en variedad de productos.
- Tiene disponibilidad de productos y tallas, esta bien.
- Tienen todas las tallas, no ha tenido problema en ese aspecto.

## Appendix H

### *Product and Size Availability in H&M*

#### **Disponibilidad de productos y tallas (H&M)**

- Bien, siempre ha encontrado lo que busca.
- Buena experiencia porque siempre encuentra los productos y tallas que necesita.
- Buena pero cuando las ha encontrado en las tiendas físicas muchas de las veces le mandan a otro lugar, lo cual se vuelve incómodo porque generalmente esta de viaje y no puede perder tiempo.
- En H&M no ha tenido problema.
- En las dos bien, siempre encuentra las tallas que busca y si no están en tiendas hay en las páginas digitales.
- Mas tallas pero mas productos del mismo.
- Mejor manejo del tallaje y mas disponibilidad de productos.
- Mucho más fácil encontrar los productos y tallas que busca.
- Muy pocas veces no ha encontrado la talla que necesita.
- No ha tenido mayor inconveniente.
- Se agotan muy rápido.
- Si ha encontrado siempre lo que busca.
- Si hay pero el tallaje es diferente ya que en ocasiones el mas grande de lo normal y por eso no le gustan mucho.
- Siempre encuentra lo que necesita, no tenido problema con los productos.
- Siempre encuentra varios productos que le llaman la atención.
- Siempre hay los productos y tallas que busca.
- Siempre hay mas disponibilidad online y sobre todo en variedad de productos.
- Siempre tienen disponibilidad.
- Tiene disponibilidad de productos y tallas, esta bien.
- Tienen todas las tallas, no ha tenido problema en ese aspecto.

## Appendix I

### Customer Service in Zara

#### Atención al cliente (Zara)

- Atención mas personalizada y mejor asesoramiento.
- Bien, la atención al cliente es buena pero depende mucho del país en que se encuentre.
- Bien.
- Buena atención al cliente.
- Buena atención al cliente. Dispuestos a realizar cambios o devoluciones.
- Buena atención, te resuelven cualquier duda enseguida y si necesitas otra talla te la dejan dentro de los probadores en poco tiempo.
- Buena, atención inmediata.
- Buena.
- Casi ya no se encuentra personal dentro de las tiendas.
- El personal no es muy atento.
- El personal no está atento todo el tiempo.
- Excelente servicio.
- Excelente.
- Las dos tienen la misma estructura de atención al cliente. No es una atención personalizada.
- Mejor atención, self check out. Están a la vanguardia.
- Muy buena.
- No encuentras mucho personal que te ayude.
- No tienen buena atención al cliente.
- Siempre le ha ido bien, la gente es amable y está dispuesta para ayudarte en lo que necesitas.

## Appendix J

### Customer Service in H&M

#### Atención al cliente (H&M)

- Bien, la atención al cliente es buena pero depende mucho del país en que se encuentre.
- Bien.
- Buena atención al cliente.
- Buena atención al cliente. Dispuestos a realizar cambios o devoluciones.
- Buena, el personal está capacitado y te ayuda en lo que necesitas.
- Buena.
- Casi ya no se encuentra personal dentro de las tiendas.
- El personal no está tan capacitado y muchas de las veces no te dan respuesta en cuanto a disponibilidad de las prendas.
- Excelente servicio.
- Excelente.
- Las dos tienen la misma estructura de atención al cliente. No es una atención personalizada.
- Las personas que trabajan ahí son más pendientes y te ayudan en lo que necesitas.
- Mejor ayuda por parte del personal.
- Muy buena.
- No son muy atentos. No cuentan con tecnología.
- Personal es amable.
- Siempre le ha ido bien, la gente es amable y está dispuesta para ayudarte en lo que necesitas.

## Appendix K

### Purchasing from the Brands through Their Websites

Compra de las marcas mediante sus páginas web	Frecuencia
Si pero no con frecuencia.	1
Si, solo H&M.	3
Si, solo Zara.	1
Si.	15
<b>Total general</b>	<b>20</b>

## Appendix L

### Information on the Websites

#### Información en las páginas web

- En base a su experiencia si es bastante clara. Considera que esta información si es suficiente para compra en línea.
  - La mayoría de veces le ha ido bien, en las dos marcas.
  - No mucho, suele basarse en compras anteriores. Pero hay prendas que cambian de tamaño en relación con las que usualmente utiliza.
  - Si en la mayoría de casos.
  - Si le ayuda en el proceso de compra pero en relación a HM las imágenes no son tan llamativas como las de Zara.
  - Si pero siempre es arriesgado porque no puedes ver la calidad del producto pero sobre todo en Zara son mas específicos y tienen mejor detalle y claridad de imágenes dentro de sus páginas web.
  - Si porque generalmente ya sabe que talla es en esa marca.
  - Si ya que tienen buenas descripciones e imágenes.
  - Si, ambas marcas tienen una buena página web que te muestra cada detalle de las prendas.
  - Si, buena descripción del material y de las tallas.
  - Si, considera que esta bien y le gusta ver en línea los productos para optimizar tiempo.
  - Si, el único problema es que generalmente en Zara depende del material con el que esten hechas las prendas y varían las tallas, demostrando la dificultad de comprar sin probarse.
  - Si, en H&M la página es un poco mas amigable y más fácil de usar. Considera que esta tiene mejor información y de manera mas clara. La información si es suficiente para el entrevistado porque siempre que compra, las tallas están bien.
  - Si, en todas la compra le ha ido bien.
  - Si, esto le ayuda para poder saber todo acerca del producto.
  - Si, le ha ido bien con las dos marcas de acuerdo a las descripciones de las páginas.
  - Si, totalmente.
  - Si.
  - Si.
- 

## Appendix M

### Most Useful Website Features

#### Funciones más útiles de las páginas web

- Ayuda con la identificación de tallas y distribución del catálogo.
  - Chatbots, ofertas, notificaciones y sobre todo los correos electronicos que mandan constantemente.
  - Claridad a las descripciones de producto y filtros.
  - Descripción de las tallas.
  - Diferencias pero no tan notorias, solo como está organizada las páginas pero son similares.
  - División de catálogo y recomendaciones.
  - División de catálogos y sección de descuentos.
  - Facilidad de opciones de pago.
  - Filtros para dividir según lo que necesites, disponibilidad del productos, identificación de colores y tallas. La guía de tallas esta muy generalizadas.
  - Guía de tallas y el zoom que permite hacer a las imágenes.
  - Imágenes y facilidad de pago.
  - Las fotos que usan y las sugerencias para combinar con otras prendas.
  - Las referencias de las medidas que corresponden a las prendas.
  - Los filtros por así puedes ir directo a lo que quieres.
  - Los filtros, según precio - talla y disponibilidad. Secciones de acuerdo a lo que quieras. Sección de rebajas en las dos marcas.
  - Los filtros y la división por catálogos.
  - Opción de envío y costos justos.
  - Organización de los catálogos.
  - Review de la gente y lo que te sugieren en base a compras previas.
  - Zara es muy bueno ya que pones tu talla, peso y medida entonces sabes exactamente como te va a quedar. En HM no.
-

## Appendix N

### *Use of Online Customer Service*

#### Uso de atención en línea

- En Zara.
  - No, en ninguno de los dos.
  - No, nunca ha tenido inconvenientes.
  - No.
  - Nunca.
  - Si, en HM.
  - Si, en las dos.
  - Si, en Zara para devoluciones.
  - Si, solo de Zara.
  - Si, solo de Zara.
  - Si, solo en Zara.
  - Si.
  - Si.
- 

## Appendix O

### *Experience with Digital Customer Service Channels*

#### Experiencia en los canales de atención digital

- Buen trato, respuesta inmediata. El chatbot funciona bien y si necesita atención más específica le contactan con un asesor en un tiempo aproximado de 2 minutos.
  - Buena experiencia, respuesta inmediata.
  - Considera que los chatbots dentro de las páginas son de ayuda ya que están disponibles 24/7 y la respuesta es inmediata. Esto se da igual en las dos marcas.
  - En HM no le dieron solución para su problema con el pago con tarjeta y a la final no realizó la compra.
  - Hace uso de los chatbots y luego le dirigen a un asesor. El problema es que la comunicación se corta si no respondes enseguida.
  - Las dos marcas han sido buenas en este aspecto, los chatbots que utilizan dentro de las mismas son de mucha ayuda ya que te resuelven las dudas al instante y también puede contactar con colaborador real si es necesario.
  - Mala experiencia en la devolución ya que nunca llegaron a recoger el producto.
  - No le han respondido pronto, se han demorado unos 4 días. Pero solo la devolución lo ha hecho en tienda.
  - Se demora mucho tiempo en solucionar el problema.
- 

## Appendix P

### *Online Shopping Experience (Zara)*

#### Experiencia comprando en línea (Zara)

- Bien, ha tenido buena experiencia comprando en línea. Porque puede escoger la ropa, ver la talla y pagar de manera sencilla. Proceso fácil.
  - Bien, incluso te sugieren que talla te queda de acuerdo a tu historial de compras.
  - Buena experiencia de compra pero en la entrega se demoran más de lo que dicen y no llega el pedido completo en un solo paquete.
  - Buena experiencia, mayor cantidad de productos y los mismo en línea y en el aspecto de tiendas físicas.
  - Buena experiencia.
  - Buena experiencia en cuanto a la calidad y de sus productos. La página web y las tiendas físicas le gustan mucho.
  - Buena pero hay cosas que se pueden mejorar en cuanto a tallas e imágenes de las prendas.
  - Buena pero hay problemas con las devoluciones.
  - Buena pero no le gusta que los productos no se reserven en el carrito ya que al momento de pagar hay algunos que ya no están disponibles.
  - Buena, mejorar el aspecto de devoluciones.
  - Buena, son buenos productos, todo lo que ha comprado en línea la ha resultado de buena calidad.
  - Hay ocasiones donde usan fotos que no se ve bien el producto porque se enfoca más en las modelos.
  - Las tallas de esta marca cambian mucho y eso no le da tanta confianza para pedir sin probarse.
  - Muy buena pero en el tiempo de entrega se demoran mucho.
  - Muy buena, su página web es más amigable que la de H&M.
  - Muy buena. Da la opción de analizar más los productos.
-

## Appendix Q

### Online Shopping Experience (H&M)

#### Experiencia comprando en línea (H&M)

- Bien, ha tenido buena experiencia comprando en línea. Porque puede escoger la ropa, ver la talla y pagar de manera sencilla. Proceso fácil.
  - Bien, su página es clara y te hace que fluya el proceso de compra sin interrupciones.
  - Bien, su página es eficiente.
  - Buena experiencia.
  - Buena pero hay cosas que se pueden mejorar en cuanto a tallas e imágenes de las prendas.
  - Buena, son buenos productos, todo lo que ha comprado en línea la ha resultado de buena calidad.
  - Buena.
  - Destaca por la rapidez de entrega, eso hace que quiera seguir viendo las prendas así no sean de tan buena calidad.
  - Es mejor en esta marca ya que en devoluciones te devuelven hasta el costo del envío.
  - Excelente, los productos se mantienen reservados y su página no se cuelga a ningún momento.
  - Le gusta más comprar en línea en esta marca.
  - Los productos al menos de la página de Ecuador son distintos a los que se encuentran en el local.
  - Mejor experiencia ya que llega en muy poco tiempo.
  - Muy buena y sobre todo son ágiles.
  - Muy buena.
  - Muy buena. Da la opción de analizar mas los productos.
  - Satisfactora ya que llega rápido y el empaque es adecuado.
- 

## Appendix R

### Delivery Time (Zara)

#### Tiempo de entrega (Zara)

- -
  - 10-15 días.
  - 15 días.
  - 2 semanas
  - 3 semanas.
  - 5 a 8 días dependiendo de la disponibilidad del producto
  - Bien, son eficientes.
  - Dos semanas.
  - Mala experiencia porque no llega pronto. Se demoran al menos 2 semanas.
  - Más de 15 días.
  - Más de una semana.
  - Más demorado, se toma mínimo una dos semanas.
  - Se demora más de 2 semanas.
  - Se demora más y el pedido generalmente llegan por separado. Pero si cumplen el tiempo de entrega que te dicen cuando finalizas la compra. Tiempo: más de una semana.
  - Una semana.
-

## Appendix S

### *Delivery Time (H&M)*

#### Tiempo de entrega (H&M)

- 1 semana máximo.
  - 2 días
  - 2 días.
  - 3 a 4 días
  - 3 días
  - 4 días.
  - Bien, son eficientes.
  - De 2 a 3 días.
  - Inmediato (máximo 2 días)
  - Inmediato.
  - Llega en 2 días.
  - Mas veloz, en 2 días llegan los productos.
  - Máximo 3 días.
  - Máximo 3 días.
  - Máximo 4 días.
  - Máximo en 4 días.
  - Menos de 4 días.
- 

## Appendix T

### *Use of Mobile Applications*

#### Uso de las aplicaciones móviles

- No.
  - Si, la app de Zara usa casi todos los meses mientras que la de H&M lo hace con menor frecuencia.
  - Si, se ha descargado para poder comprar directo.
  - Si, solo de Zara no tenía conocimiento de la de HM.
  - Si, solo de Zara.
  - Si, solo de Zara. No sabía que HM tiene app entonces entra por la página web.
  - Si.
  - Si.
  - Solo de Zara , siente que parecida a la página web pero es más fácil porque la cuenta siempre esta abierta y te permite llevar un mejor registro.
  - Solo de Zara, no conocía que H&M tiene app en Ecuador.
  - Solo de Zara. Para comprar mas directo y ya no entrar a la página web o ir a un local.
- 

## Appendix U

### *Differences Between the Mobile Applications of Zara and H&M*

#### Diferencias entre ambas aplicaciones móviles

- Diferencias en cuanto a la organización pero en si no son tan notorias. Destaca que la de H&M es mucho mas manejable que la de Zara.
  - H&M mas lenta ya que se desactualiza constantemente, lo cual genera molestia e impide que fluya el proceso de compra. En Zara nunca ha tenido ningún problema.
  - La app de Zara es mas elegante y ordenada que la de HM.
  - La de Zara tiene un mejor diseño donde usan de manera adecuada las imágenes. La de HM se enfoca mas en solo vender los productos y no usan imágenes tan atractivas ni elaboradas.
  - Las dos son amigables, no considera que hay diferencias significativas.
  - No persibe diferencias, las dos son fáciles de usar.
  - Son similares, no hay mayor diferencia.
  - Zara es mas fácil de usar y en HM la calidad de las fotos no van de acuerdo a como es la prenda y la app se culga.
-

## Appendix V

### *Most Useful Mobile Application Features*

#### **Funciones más útiles de las aplicaciones móviles**

- Avisos del proceso de compra.
  - Barra para buscar productos y la división de catálogo.
  - Clasificación de los productos y notificaciones.
  - División por secciones, permite acceder a la información de los productos que esta buscando.
  - En Zara te recuerdan cuando llega el producto que estabas buscando.
  - Filtros por categorías y traqueo del producto.
  - Filtros por categorías.
  - Flitro ya que encuentras más rápido lo que buscas.
  - Forma en la cual presentan los productos y la manera en la cual estan puestos los catálogos.
  - Mantener la sección iniciada, lo que le permite tener el carrito y las prendas que le interesan.
  - Notificaciones y descripción del producto.
  - Notificaciones y recomendaciones.
  - Notificaciones y seguimiento del pedido.
  - Recomendaciones y notificaciones acerca de las colecciones y descuentos.
  - Sección de recomendaciones y claridad en cuanto a materiales de las prendas.
- 

## Appendix W

### *Use of Digital Channels Before Purchasing in Physical Stores*

#### **Uso de los canales digitales antes de comprar en las tiendas físicas**

- No debido a que no tenemos tiendas físicas dentro de la ciudad.
  - No, generalmente ya cuando ve en la web la compra directo y no se va a las tiendas físicas al menos de que esten cerca.
  - No, la mayoría de veces compra online.
  - No, nunca hace eso. Siempre escoge un solo canal.
  - No, solo compra online o en las tiendas físicas directo.
  - No.
  - No.
  - Si pero en algunas ocasiones le dicen que los productos no estan disponibles dentro de la tienda física lo cual por un lado es bueno porque no pierde tiempo.
  - Si, de ambas marcas.
  - Si, hay veces que primero revisa en línea y si hay va a comprar en caso de que pueda o sino ya solo las compra en línea.
  - Si, hay veces que ve algo y va a la tienda física a buscar pero como en la ciudad no tenemos estas tiendas se le hace mas difícil.
  - Si, le ha ido bien para ver disponibilidad de productos.
  - Si, revisa antes de ir a la tienda para saber sobre el producto, materiales y precio.
  - Si, siempre y prefiere solo comprar en línea.
  - Si, solo en Zara y la usa para no perder tiempo en el local.
  - Si, solo H&M.
  - Si. Pero el rato de ir a probarse no te queda como esperas o no hay el producto en la tienda que vas.
-

## Appendix X

### Post-Purchase Experience (Zara)

#### Experiencia después de la compra (Zara)

- Al demorarse mas en la entrega si tiene que estar viendo constantemente las actualizaciones del pedido. En reembolsos se demoran mucho tiempo.
  - Bien, le gusta que tengan la opción de seguir el pedido. El empaquetado de esta marca es característico.
  - Bien, no han tenido que realizar ningún cambio. El paquete en el que llega las prendas es adecuado y se conserban bien.
  - Bien, por mas de que se demore bastante te informan cada novedad acerca del pedido.
  - Buena pero se demora mas en devolver el dinero.
  - Buena, el seguimiento del producto es importante y te llega en buen estado. No ha necesitado hacer cambios o devoluciones.
  - Buena, le llega bien empaquetado. No ha tenido que hacer cambios pero le ha ido bien con el seguimiento de los pedidos para tener una idea en el estado en el cual esta este proceso.
  - Buena.
  - En devoluciones que ha hecho en las tiendas físicas no ha tenido problemas.
  - En relación con el seguimiento de pedido es bueno en las dos ya que llega en la fecha establecida.
  - En Zara le ha ido bien, cuando ha solicitado una devolución le responden enseguida.
  - En Zara no le ha ido bien ya que intentó hacer una devolución pero nunca llegaron a retirar la prenda.
  - Las devoluciones son eficases. No le ha dado problemas a mas de que le piden mandar con el mismo empaque.
  - Nunca falla su calidad y cuidados que le dan a las prendas. Pero no llegan rápido lo que genera molestia.
  - Nunca ha realizado devoluciones, solo seguimiento del pedido.
  - Seguimiento del pedido eficiente, se sabe cada parte del proceso en tiempo real.
  - Si lo ha hecho en Zara mediante la app, facil cuando esta en la misma ciudad donde esta la tienda. Te da la opción de dejar en cualquier local. En Cuenca nunca lo ha hecho porque no hay una tienda física en la ciudad y se le complica más.
- 

## Anexo Y

### Post-Purchase Experience (H&M)

#### Experiencia después de la compra (H&M)

- Bien, el seguimiento del pedido es bueno. Llega en menos tiempo del que te dicen al finalizar la compra y en la entrega las prendas llegan en perfectas condiciones.
  - Bien, le gusta que tengan la opción de seguir el pedido. Su empaquetado es mas sencillo.
  - Bien, no han tenido que realizar ningún cambio.
  - Buena en cuanto a seguimineto del pedido ya que puedo ver cada paso.
  - Buena pero HM es mejor en devoluciones.
  - Buena, el seguimiento del producto es importante y te llega en buen estado. No ha necesitado hacer cambios o devoluciones.
  - Buena, le llega bien empaquetado. No ha tenido que hacer cambios pero le ha ido bien con el seguimiento de los pedidos para tener una idea en el estado en el cual esta este proceso.
  - En devoluciones que ha hecho en las tiendas físicas no ha tenido problemas pero en línea nunca le respondieron y no pudo realizar la devolución.
  - En relación con el seguimiento de pedido es bueno en las dos ya que llega en la fecha establecida.
  - Excelente, puedes encontrar también prendas de buena calidad y el seguimiento del pedido es eficaz. Se mantienen en constante interacción por medios como el mail.
  - HM buena en aspecto de devolución ya que te retiran de la casa y antes de que llegue el estado de cuenta ya te devulven el dinero.
  - No ha tenido ningún problema, incluso dice que le entregan el producto antes de lo notificado. Motivo por el cual casi ni hace uso del seguimiento del pedido.
  - No ha tenido ningún problema.
  - No ha tenido problemas y siempre le infroman de cada parte del proceso.
  - Nunca ha devuelto nada, el seguimiento del pedido si lo usa para saber el tiempo exacto en el cual va a llegar.
  - Nunca ha devulto nada de esta marca.El seguimiento del pedido es de suma utilidad.
  - Nunca ha realizado cambios ni devoluciones. El seguimiento del pedido si le resulta bueno porque se puede mantener informada del proceso.
  - Nunca ha realizado devoluciones, solo seguimiento del pedido. Resalta esta marca porque se puede ver claramente el proceso del pedido y cuando va a llegar.
  - Nunca lo ha hecho.
  - Seguimiento del pedido eficiente, se sabe cada parte del proceso en tiempo real.
-

## Appendix Z

### Combination of Physical and Digital Channels

#### Combinación de los canales físicos y digitales

- No, nunca.
- No, solo hace uso de un solo canal ya sea digital o físico.
- No, solo un canal ya sea físico o digital.
- No.
- No.
- No. Se mantiene solo en el digital.
- Si, cuando visita ciudades que tienen estas tiendas suele hacer la compra en línea y recogerla en tienda para no perder tiempo. La experiencia ha sido buena y si algún producto no me da o pasa algo solo lo devuelvo ese rato.
- Si, ha comprado en línea y ha retirado de tienda. En las dos marcas.
- Si, ha ido a recoger de la tienda. Buena experiencia, lo aplica cuando no quiere que el producto se agote. En caso de requerir cambio lo hace ahí mismo.
- Si, ha revisado prendas dentro del local por medio de sus aplicaciones móviles.

## Appendix AA

### Social Media Content (Zara y H&M)

#### Contenido en redes sociales (Zara)

- Comtenido en Instagram.
- Facebook e Instagram
- Instagram
- Instagram constantemente.
- Instagram, Facebook
  
- Instagram, TikTok
- Muy seguido.
- No ha visto mucho.
- No ha visto publicidad en redes.
- No.
- Si ha visto en Instagram y en TikTok que son la redes que mas usa.
  
- Si ha visto en todas la redes sociales.
- Tik tok
- Tik tok e Instagram
- Todo el tiempo, en todas las redes.

#### Contenido en redes sociales (H&M)

- Facebook e Instagram
- H&M si le sale mucho en instagram.
- Instagram
- Instagram, Facebook
- Instagram, Facebook más de esta marca.
- Mayor contenido de esta marca en Instagram y en TikTok.
- Muy seguido.
- No ha visto.
- No le sale mucho.
- No.
- Si ha visto en todas la redes sociales. Pero de esta marca le sale con mas frecuencia.
- Si ha visto publicidad pagada en youtube y otras plataformas.
- Si le sale a cada rato en Instagram.
- Tik tok
- Todo el tiempo, en todas las redes.

## Appendix BB

### *Influence of Social Media Content (Interest and Connection with the Brands)*

#### **Influencia del contenido en redes sociales (interés y conexión con las marcas)**

- Considera que el contenido al ser pagado se vuelve repetitivo y ya no le presta mucha atención. En su caso no influye.
- Bastante porque cada que lanzan nuevas prendas o publicidad en redes le interesa mas y eso incentiva su compra.
- Bastante porque hay veces que no necesita comprar pero viendo la publicidad crea una necesidad.
- Completamente.
- Influye bastante ya que si es repetitivo te causa interés por comprar.
- Influye bastante, ya que cuando le salen nuevos productos le atrae para comprar. En tik tok ve gente que se prueba las prendas genera necesidad de comprar, dependiendo de la estación.
- Influye mucho porque al no entrar constantemente a la página, la novedades en redes te crean el interés por buscar mas sobre el producto o colección.
- Influye mucho porque le gustan bastante las marcas y mediante la publicidad en redes le da interés por comprar. Zara le parece que tiene mejor publicidad dentro de redes.
- Influye mucho ya que al ver las prendas le da mas ganas de comprar.
- Influye mucho ya que de esta forma puede ver la novedades de las marcas y se mantiene informada.
- Influye mucho, si sale algo que le interesa se ingresa a la página web para ver el producto y muchas veces termina comprando.
- Les da mayor presencia a las marcas y eso hace que como usuario siempre estes buscando alternativas y en la mayoría de casos entra de inmediato a ver el producto de interés y muchas de las veces los compra.
- No influye porque busca en la página cuando quiere algo.
- No influye porque revisa siempre las páginas web y no se fija en la publicidad.
- No influyen tanto pero hay veces donde si ve algo y si le interesa busca (puede ser que la compre).
- No influye por su interes de ir a la tienda física para ver incluso otros productos. Si ve en redes sociales no busca mas acerca del producto. No considera que influyan para tener conexión con las marcas.
- SI influye porque por estos medios conoce acerca de promociones o cambios de temporada que le incita a comprar.
- Si influye, cuando ve una prenda que le gusta ingresa a los medios digitales y generalmente la compra.
- Tiene mucha influencia, el contenido hace que busque enseguida el producto independientemente si lo compre o no.

## Appendix CC

### *Price–Quality Relationship (Zara)*

#### **Relación entre precio y calidad (Zara)**

- Ahora siente que han bajado la calidad de sus productos y no va de acuerdo a los precios.
- Buena pero no en todos los productos.
- Buena, esta de acuerdo.
- Buena, los precios van de acuerdo a la calidad de sus prendas.
- Buena, no le parece caro porque la ropa le ha durado muchos años.
- Buena.
- Depende de las prendas ya que hay algunas que no va la calidad en relación al precio.
- Depende del producto pero en general esta bien.
- Depende del producto, hay algunas cosas que si duran pero otras que se dañan a la primera lavada, esto siente que depende del material y el cuidado que le des. En general bueno porque no es un precio tan elevado.
- Depende del producto, ya que en mucho de los casos el precio no va de acuerdo a la calidad.
- Depende del producto. Su calidad ha bajado.
- Esta de acuerdo.
- Esta dentro de lo correcto ya que no es una marca extremadamente costosa pero tiene prendas de calidad media y precio medio.
- La calidad de Zara es mejor pero el precio si es elevado. Si va de acuerdo.
- Muy buena. Mejor calidad que H&M.
- Muy buena. No es barato pero la calidad sabe que siempre le van a llegar productos de buena calidad.
- Precios elevados pero de acuerdo a su calidad.
- Tiene diferentes calidades, es mas costosa pero va de acuerdo a la calidad de sus productos.
- Va de acuerdo la calidad al precio que establece la marca.

## Appendix DD

### Price–Quality Relationship (H&M)

#### Relación entre precio y calidad (H&M)

- Bien ya que no son muy costosos pero va de acuerdo a la calidad.
- Bien, si va de acuerdo la calidad con el precio.
- Bien, son precios económicos que se reflejan en la calidad de su ropa.
- Bien, va de acuerdo a la calidad.
- Buena porque es de menor calidad pero va de acuerdo al precio.
- Buena, no ha tenido problemas con la ropa que ha comprado. Precios mas bajos.
- Depende de las prendas ya que hay algunas que no va la calidad en relación al precio.
- Depende del producto pero en general esta bien.
- Es bueno pero lo considera como una marca para ropa básica.
- Estan de acuerdo.
- Estan de acuerdo. Precio accesible y buena calidad.
- La calidad no le gusta tanto porque es de inferior calidad pero va de acuerdo al precio.
- La calidad si es inferior.
- Más económico que Zara. El rato de la compra la talla esta bien pero al lavar sobre todo las camisetas de hombre tienden a hacerse mas chicas.
- Muy buena, precios accesibles.
- Precios mas económicos pero calidad mas baja. Peero en general es una muy buena relación.
- Prendas mas económicas pero se nota en la calidad y tiempo de vida útil de las prenda.
- Si va de acuerdo la calidad con el precio.
- Va de acuerdo la calidad al precio que establece la marca.
- Va de acuerdo pero la ropa es mas barata y dura menos.

## Appendix EE

### Influence of Product or Collection Turnover

#### Influencia de la rotación de productos o colecciones

- Como consumidor es positivo ya que te permite comprar con frecuencia sin embargo esto crea nuevas tendencias a cada rato lo cual te vuelve impulsivo a la compra sin tener una necesidad.
- Cree que si cambian frecuentemente, las colecciones nuevas las transmiten por medio de mails o notificaciones de las aplicaciones móviles. Te atrae a comprar mas seguido.
- Este aspecto le permite estar en la moda de la actualidad. Aspecto igual en las dos marcas.
- Influye bastante porque si le interesa algo compra ese rato para que no se agote. Al innovar a cada rato hace que se pueda tener exclusividad y que no todos tengan la misma prenda. Dice que en Zara cambian con mayor frecuencia.
- Las dos cambian con frecuencia y le da opciones de nuevas prendas en cada temporada.
- Las dos cambian frecuentemente (más de una vez al mes) influye bastante porque cada vez hay nuevas tendencias que te despiertan el interés por comprar para estar a la moda. P MAS EN ZARA.
- No ha notado mucho, solo compra cuando necesita.
- Si cambian, mas las colecciones de Zara ya que lo ha visto con mayor frecuencia pero en general HM no esta mal tampoco. Esto influye mucho porque te da más opciones de ropa y te incita a comprar.
- Si ha notado que cambian con frecuencia de acuerdo a las estaciones de los país mas influyentes para las marcas. No influye en su interés por las marcas.
- Si ha notado que cambian con frecuencia pero no influye en su interés por ir a comprar la ropa. Compra cuando necesita no cuando cambian de colección.
- Si ha notado que cambian constantemente. Le interesa comprar en cambio de temporada porque tienen descuentos. Buena rotación de productos en las dos.
- Si ha notado que cambian e influye porque le da el interés de comprar nuevas cosas para estar a la moda.
- Si ha notado que cambian, esto influye bastante y le da la opción de variar en el estilo de su ropa.
- Si ha notado y le gusta porque hay ropa nueva cada vez y de esta forma no se satura el mercado.
- Si ha visto que cambian pero considera que en los últimos años se ha mantenido una línea en el estilo de la moda, esto le gusta y por eso frecuenta estas dos tiendas.
- Si, de las dos marcas. Esto hace que se cree una necesidad de cambiar de ropa más rápido.
- Si, esto es ventajoso ya que en camvio de temporada presentan descuentos atractivos.
- Si, mas Zara ya que tienen mas colecciones durante el año ves prendas nuevas que te hacen mantenerte enganchada para no perderte los nuevos productos.
- Si, principalmente en Zara ya que es la que mas consume, resalta que cuando va a las tiendas ve que cambian de productos en un tiempo aproximado de 2 a 3 días. Este aspecto le hace que quiera entrar al local y consumir.
- Siente que en Zara siempre estan cambiando de colecciones lo cual le incita mas a comprar. HM tiene mas ropa básica que no compras con mucha frecuencia.

## Appendix FF

### *Choice Between entre Zara and H&M*

#### **Elección entre Zara y H&M**

- H&M por la agilidad en cuanto a envíos y precios mas bajos.
  - H&M porque es mas accesible para todos los segmentos.
  - H&M porque los precios no son altos y la calidad es buena.
  - H&M ya que hay ropa mas juvenil para su hija, por esa razón compra mas en esta marca.
  - H&M ya que puedes encontrar variedad.
  - Si es físico prefiere Zara pero virtual HM porque si no le da bien o algo pasa la pérdida de dinero no es tan significativa.
  - Zara debido a que tiene una mejor calidad y encuentras tanto básicos como ropa elegante.
  - Zara por el cambio constante de colecciones, calidad de la ropa. HM al tener ropa más básica no se renuevan mucho.
  - Zara por la calidad y el estilo de sus prendas. Resalta que hasta la experiencia de abrir un paquete de esta marca es distinto ya que viene en una cartones de la marca con muchos cuidados para que los productos esten de la mejor manera.
  - Zara por su calidad y estilo de ropa mas formal.
  - Zara por su calidad.
  - Zara por su variedad de materiales y la facilidad de compra en sus canales digitales.
  - Zara por sus diseños, variedad de opciones. Al entrar a la tienda si siente que tiene una mejor experiencia donde destaca su elegancia.
  - Zara por sus prendas mas formales.
  - Zara por sus prendas para ocasiones mas formales, su calidad destaca ante HM.
  - Zara porque aunque los precios son mas elevados la ropa dura mas tiempo y le gusta mas el estilo. Siente que HM es muy juvenil o incluso mucho para niños.
  - Zara porque es mas exclusivo y de mejor calidad.
  - Zara porque le gusta mas la calidad.
  - Zara porque presenta un estilo más sobrio y elegante.
  - Zara ya que si bien es mas costosa, el tipo de prendas da mayor elegancia y formalidad mientras que H&M es mas casual.
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## Appendix GG

### *Brand that Better Integrates Its Channels*

#### **Marca que integra mejor sus canales**

- H&M porque atiende a diferentes tipos de mercado y no tiene un enfoque específico.
  - H&M porque de lo que ha visto en redes son los mismos productos que encuentra en la página web cuando la usa y los que encuentra en tienda.
  - H&M porque encuentra la misma ropa en la página web y en tienda.
  - H&M porque la información es mayor y tienen buen manejo de sus canales.
  - H&M porque le sale publicidad mas seguido y se relacionan mejor. De Zara nunca le ha salido nada.
  - H&M porque se mantienen mejor conectados con los consumidores ya sea por redes sociales o mail y puedes encontrar una tienda de esta marca en cualquier lugar que visites.
  - H&M porque tiene buenos medios digitalas, la organización en cuanto a envíos es excelente y a cada rato le mandan mails en relación a descuentos y productos.
  - Las dos van a la par pero se quedaría con H&M ya que es la que le envía mas contenido por mail y le informa todo.
  - Zara debido a que siempre tienen las cosas que se publicitan en redes dentro de sus tiendas digitales y en línea.
  - Zara por sus procesos fáciles de compra y el uso de sistemas tecnológicos .
  - Zara porque generalmente los productos que estan online los encuentras en tienda pero en HM si varía mucho.
  - Zara porque siempre está presente en redes y mantienen buenos sistemas digitales que aplican en tiendas como el pago personal y la disponibilidad de reservar probadores.
  - Zara porque tiene mas presencia y es mas llamativo a la vista tanto en sus tiendas físicas como digitales. Te da una mejor percepción de glamour.
  - Zara porque tiene una mejor conexión entre los productos en tienda y lo que se ofertan en las tiendas.
  - Zara tiene mucha presencia en redes y se interesa más en darte a conocer por el medio que sea sus productos y portafolio. Considera que están mas pendientes de los consumidores. Tiene un mejor tipo de marketing.
  - Zara ya que gestiona de mejor manera el servicio al clientes.
  - Zara ya que tiene una mejor gestión del aspecto físico y digital y se hacen presentes de las dos maneras con ideas novedosas e innovadoras.
  - Zara, va de acuerdo los productos disponibles en la página web y en las tiendas.
  - Zara.
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## Appendix HH

### *Aspects that Differentiate Zara and H&M from Other Fashion Brands*

#### **Aspectos que diferencian a Zara y H&M de otras marcas de moda**

- Al ser marcas con una larga trayectoria y reconocimiento a nivel mundial se diferencian de las otras ya que no han llegado a ser tan nombradas. Resalta su variedad de oferta.
  - Al ser moda fast fashion son prendas básicas que se las compra regularmente y económicamente la mayoría de personas pueden acceder a estos productos. Presencia en varias ciudades y países. En nuestro caso, al no tener tiendas dentro de la ciudad las puedes acceder en línea.
  - Cambio constante de colección y casi siempre disponibilidad de tallas requeridas. En general si se parecen a otras marcas.
  - Considera que lo que mas las diferencia de otras marcas son sus precios y reconocimiento mundial.
  - El marketing en redes y los aspectos visuales de cada una de las tiendas.
  - El marketing, el precio y la rotación de productos.
  - H&M se diferencia ya que es económicos pero cuenta con prendas básicas que todos necesitan y no tiene tan marcadas las temporadas entonces puedes usar todo el tiempo y Zara es una marca que engloba todos los estilos y se adapta o lo que el consumidor busca.
  - La cantidad de productos que ofrecen y la accesibilidad para comprar online en especial dentro de la ciudad de Cuenca.
  - Los dos tienen ropa de tendencia y los costos no son muy elevados.
  - Los precios ya que son accesibles.
  - Moda rápida que se diferencia por sus prendas.
  - Organización de sus páginas web que le permite disfrutar del proceso de compra. Las otras no tienen tanto marketing que conecte con el cliente.
  - Posicionamiento a nivel mundial de estas marcas y su calidad en la mayoría de prendas.
  - Precios accesibles y buena calidad.
  - Precios accesibles y sus redes sociales porque mediante ellas han logrado llegar a varios segmentos alrededor del mundo.
  - Se diferencian porque son las únicas dos marcas que envían productos a Cuenca. Zara tiene mejor posicionamiento de marca a nivel internacional y HM se destaca por su variedad.
  - Se diferencia por su estilo y accesibilidad frente a las otras marcas de ropa.
  - Se diferencian porque están innovando constantemente y sus precios son buenos. Son marcas que llevan mucho tiempo en el mercado y se reconocen globalmente.
  - Se diferencian porque siempre están innovando, lanzan nuevos modelos y van con la tendencia de moda. Buenos canales de compra, entrega rápida a Cuenca.
  - Van a la tendencia, su marketing digital y variedad de estilos.
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