

2012

# Zara Marketing Audit

MBA-USQ 11: MKT5000

University of Applied Sciences Zurich (HWZ) Switzerland  
Supervised by: Prof. Richard Beswick

Anja Anastasja Keller  
U1028905  
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## Executive Summary

Zara is a publicly listed company and belongs to the Inditex Group, founded by Amancio Ortega in 1975 in Spain. Zara always continues to bring excitement to fashion and fulfils customer demand. Currently, Zara has 1,600 stores in 77 countries and continues to force its logistics system to complete stock rotation every 15 days. Zara needs only 14 days to develop a new product and delivery it to stores (industry average: six-month) and launches around 10'000 new designs each year. Furthermore, Zara disagreed to the industrial trend towards transferring fast fashion production to low-cost countries and has the most unusual strategy of zero advertising; the company preferred to invest a percentage of revenues in opening new stores instead.

Zara is moving forward with its successful entry into the digital world and continues to expand and manage its online presence: over a million daily visits on web site and more than 14 million Facebook fans. The online expanding strategy in international key markets as the U.S. is one of the hot topics and in the face of H&M's online arrival scheduled for 2012, and strengthening its presence in Asia, North America, Australia and South Africa.

The aim of this report will analyse the online strategy and particularly the online-shopping service.

## Current Market Situation

### Positioning and economic performance

The positioning of Zara brand in a competitive market aims diversification from the other competitors as H & M and GAP. Regarding Alexa Traffic Rank, Zara.com present (i) 1,440 Global Rank, (ii) 341 Rank in Spain and (iii) 16,122 Sites Linking in. Under Alexa 'Number of First Page Keywords for zara.com in Google' Figures 2) Appendix III) its illustrate the last 12 months development, especially May and June 2012 dropped significantly up nearly 50% compare the April 2012.

The sales have increased significantly by 10% reaching 13,793 million euros and the increase in the turnover and the improvement in operating efficiency have made it possible to raise EBITDA by 10%, up to 3,258 million euros. Thus, the profitability of the Group continued to improve: the net profit raided by 12% and reached 1,932 million euros.

### Target Market

Zara's target customers are paying attention in high trends and want to have the latest fashion tends but cannot afford dresses from the haute couture boutiques. In consideration of the market, Zara provides the customers with a turnover period of 4 and 5 weeks for its "New Arrivals" collections.

### Customer Profiles

In order of Alexa audience report on Zara.com on Figures 1) Appendix III) it shows the equal the main users age from 18-34, in addition, mostly female and half of them have children. The main visitors by countries of Zara.com on Figures 3) Appendix III) are from Spain (11.2%), United States (10.6%), United Kingdom (8.1%), France (7.7%), Germany (6.6%), China (4.3%), Italy (4.3%), Poland (3.3%) and Japan (3.2%), which demonstrates a balanced demographical mix of customers around the world.

## Zara Marketing Mix

### Product

Zara manufactures and sells products such as clothes, shoes, cosmetics and accessories for men, children and woman. Furthermore, Zara extended its collection with additional sizes (petit, tall).

### Price

Zara provides for people with lower income so its prices are very reasonable that everybody can afford that. Cost effectivity influences also the supply chain management, which requires a fast decision making process.

## Place

Zara is present in about 30 countries at private locations. There are 600 commercial stores and Zara is selling its service trough out the world. High frequency in the flagship stores with high valuable interior designs; new openings in prestige locations (Pitt Street, Sydney; Burke Street, Melbourne; Taipei 101 building; Taiwan and in EU: Rathenauplatz, Frankfurt; George Street London, Van Baerlestraat, Amsterdam) are Zara's target strategy.

## Promotion

Zara focuses less on advertisement based marketing, but more on internet online marketing opportunities as E-Commerce strategy, social media and online shops. From the original focus on central European market, Zara expanded its multi-channel strategy of stores and expansion in new markets such as Japan and the United States and extended online sales to Denmark, Norway, and Sweden, Monaco and Switzerland.

## Competitors Analysis

Based on the Alexa Daily Traffic Rank Trend on Figures 1) Appendix IV) gap.com, currently rank circa (c.r.c.) 900, is obviously the leader under the top ranked websites worldwide, followed by hm.com c.r.c. 1400 and zara.com c.r.c. 1600.

Regarding on Alexa Daily Reach (percent) on Figures 2) Appendix IV) the gap between gap.com and zara.com recued significantly and the estimated percentage of global internet users who visit zara.com (0.06%) and hm.com (0.07%) are nearly on the same level, and correspondents with Figures 3) Appendix IV) the estimated percentage of global pageviews.

A very interesting development on Figures 4) Appendix IV) shows the estimated daily time spent on the site (mm:ss). H&M daily time dropped down middle of July to 4:00 and jumped up middle of August to 8:00, it raises the question, what happened that users are spending 100% more time on H&M page? Compared to Zara, the users daily time of the last three months 6:37 as Gap users.

The audience under the advanced demographics for Zara and its competitors shows under Figure 5) Appendix IV) a similar customer structure, age between 18-34; education between graduated school and some collage; dominated by females; browsing location by zara.com and hm.com school / work, by guess.com school and tally-weijl.com home; yearly income by zara.com and hm.com up to \$60K, guess.com up to \$100K+ and tally-weijl.com up to \$30K.

## Online-Shopping Service

### Internal Investigation

Zara Online-Shops presents a moderate choice of fashion for women, men and kids. The user can select his search criteria by quality, characteristics, colour, size and prize. Nevertheless under Figure 1) Appendix V) even though the functionality is given, the presentation of the collection does not correspond with the high-fashion flagship stores of Zara, where Zara impresses by creative interior design and prestige location. Furthermore, by selecting a specific product, the detailed view on Figure 2) Appendix V) does not provide an outfit or accessories compensation.

The ordering process on Figure 3) Appendix V) does not show the delivery costs or time, only by adding details such as address, the order processes to the shipping stage on Figure 4) Appendix V), where you can select the shipping method. In consideration of an express delivery within 2-3 working days, the costs are 19 USD (17.95 CHF). It appears not to be a part of Zara cost-leadership strategy and by standard delivery the costs are still 8 USD (7.95 CHF) and requires 4-6 working days for delivery. In addition, the return policy under Figure 5) Appendix V) does not reflect the terms of condition easily and clear.

### Competitor Comparison

H&M Online-Shop presents a multifunctional choice of fashion for women, men and kids. The user can select his search criteria by quality, characteristics, colour, size and price, furthermore H&M provide a dress room function under Figure 6) Appendix V) where you can create your own outfit and by selecting the model under figure 7) Appendix V). H&M clearly represents the ethical fairness of customers around the world. Beside of this H&M focuses close attention on details (coat open / close; colour selection) by additional outfit presentation Figure 8) Appendix V). The User can even create out of an autumn a winter outfit or adding additional articles such as sunglasses. The item list which provides a clear overview of the total costs is present at all time on the left side of the page. Under Figure 10) - 16) Appendix V), it's all about excitement and styles. Current campaigns can be easily tried in the dress room, moreover the background can be changed by fancy colours, last but not least, the shipment costs of USD 6 (GBP 3.90) and the delivery time of 4-6 working days provide a customer-friendly service.

GAP Online-Shop presents a multifunctional choice of fashion for women, men, kids, maternity, babies and more, Figure 17), 21), 22), 23) and 24) Appendix V). The user can expand his search criteria by additional functions. GAP provides an outfit search under Figures 18), 19) Appendix V), which can be easily selected for purchase, Figure 20) Appendix V), compared to H&M where it's only a dress room and not a purchase sector. The shipment costs of USD 7 and the delivery time of 2-5 working days appear customer-friendly as well, furthermore, by selecting 7-8 working days there would be no extra charge for delivery and by express delivery of only one working day the costs of USD 22 are acceptable.

Zalando Online-Shop presents as well a multifunctional choice and outfit selection for women, men, kids, babies and more, Figure 25), 26), and 27) Appendix V). There are no shipment costs under Figure 28) Appendix V), regardless of the purchase volume. For returned goods no shipment costs are charged. Compared with the other competitors a standard delivery time by Zalando of only one working day can be rated as first-class customer service.

## PEST Analysis

### Political Analysis

Zara as one of the best retail brands worldwide has various interactions with governmental policy for intervention in the economy and legal aspects in decision making processes. There are restrictions in different countries, which have to be considered before forcing a market entry. In addition the trade policy requires specific adjustments as for example in China there is a currency policy which causes imports to the countries to be significantly above market price or India who requires productions in the country.

### Economic Analysis

Global growth increased to 3.6 percent in the first quarter of 2012 and Global trade rebounds in parallels with industrial production in the first quarter 2012, which, in turn, benefited trade-oriented economies, notably Germany and those in Asia. (World Economic Outlook Update, July 2012) Zara's expansion strategy in Asia correspond with the GDP accumulated growth Figure 2) Appendix I), however Zara should be aware of GST, Duties and Tariffs. They are based on the classification code of the goods, valuation and country of origin.

The worldwide distribution audience channel under Figure 1), Appendix I) present a % composition of regional visitors to selected retail and auction sites. Amazon Sites attracted 35.4% of its audience from North America, while Europe contributed 31.8% of visitors and Asia Pacific accounted for 24.1%, on contrary where Wal-Mart attracted 83.4% of its audience from North America and with only contributed 8.9% from Europe and Otto Gruppe attracted 92.3% of its audience from Europe.

### Social Analysis

Regarding the social media trend development it's a must for Zara to establish a social media relationship to satisfy customer's demands due to change in generation choices. It's one of Zara's strength to provide direct social contact to the customers as per Newsletter, Facebook, Twitter, Pinterest, Youtube, Flickr, Web mobile or a customer account. Furthermore, Zara social engagement for social-human rights and social-society dimension are performance indicator in the INDITEX annual report.

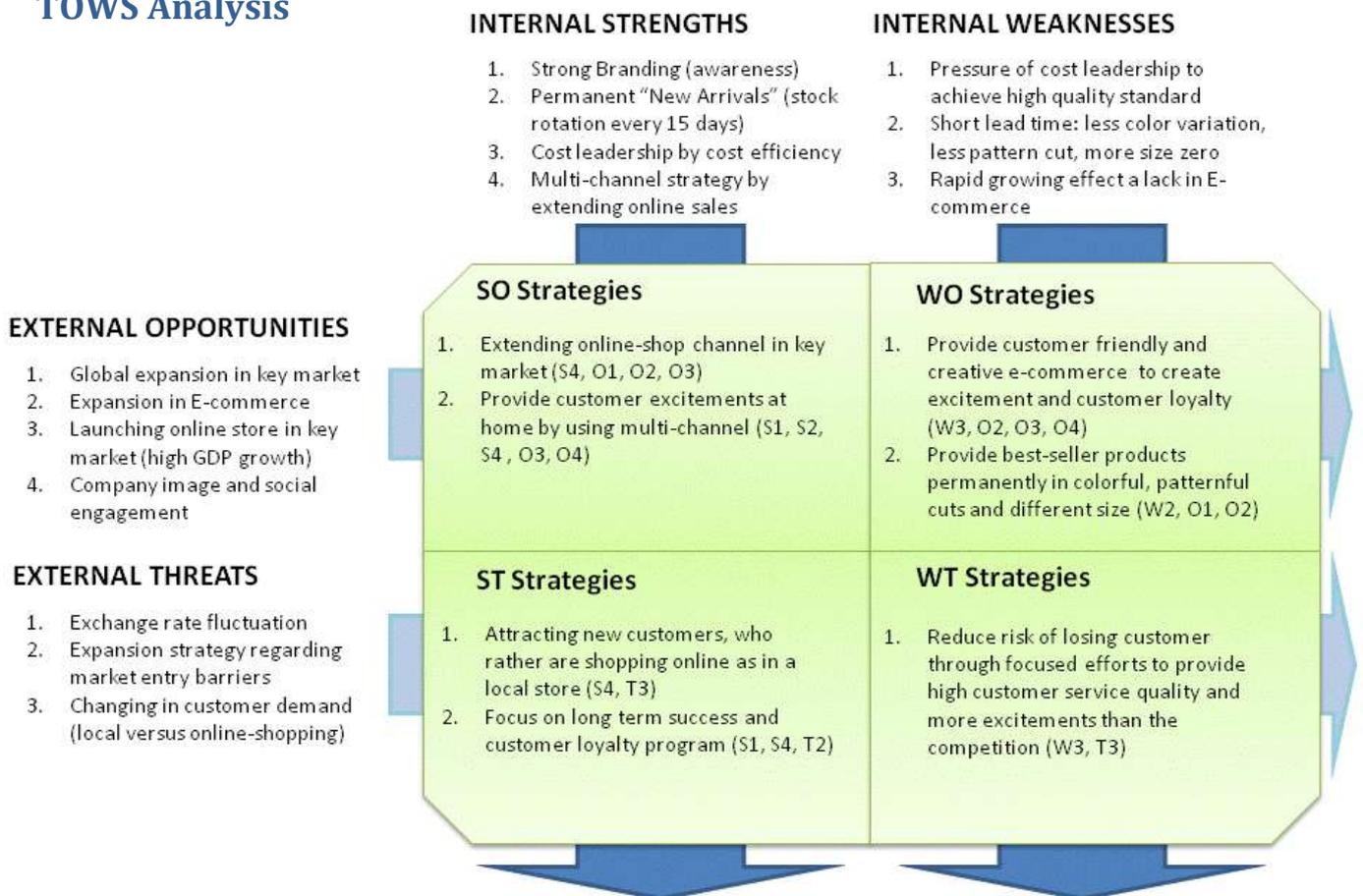
### Technological Analysis

Zara's IT strategy has to consider the complexity and requirements regarding of the organic growth strategy to reduce costs and improve quality. The consumers can benefit from these developments as well as the organisation itself by providing the efficient source of technology service. Furthermore, Zara should establish an E-Commerce strategy to expand not only on existing markets, moreover on new markets with online shopping opportunities.

### SWOT Analysis

The SWOT details analysis on Figure 3) Appendix I) present on the TOWS analysis on Table 1) the key internal strengths, weaknesses and the key external opportunities and threats.

### TOWS Analysis



1) Table of TOWS Analysis of Zara

## **Conclusion of the audit**

Even though Zara is focussing on new opening flagship stores at prestige locations around the world and providing high-fashionable new products every 4-5 weeks Zara should consider that there are potential new customers worldwide who do not visit Zara locally, because of time-efficiency Zara is not the first choice (other priorities in free time as local shopping), location wise not possible (too far away from a local store) or because organizational wise too complicated, like a young mother, who has to handle her career, children and family in the same time.

Even though Zara's online shops feature all major functions it does not correspond with Zara's local presentation (prestige image), even more a bit disappointing, especially compared with H&M's creative way to convey fashion online with the dress room function, moreover, by saving outfits or share on facebook, twitter, send a link or e-mail.

## **Recommendation objectives and proposed strategy**

Due to the fact that of online expenditure in sales not only increases the economical profit, it boosts the online ranking worldwide and creates an added value on the brand. It's highly recommended to build a customer friendly online shopping opportunity based on Appendix II) Customer Experience. By taking into account of customer friendly shop presentation among creative features, fair delivery condition with an easy return process.

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# Appendix I)

Appendix I) Global Audience in Online Shopping

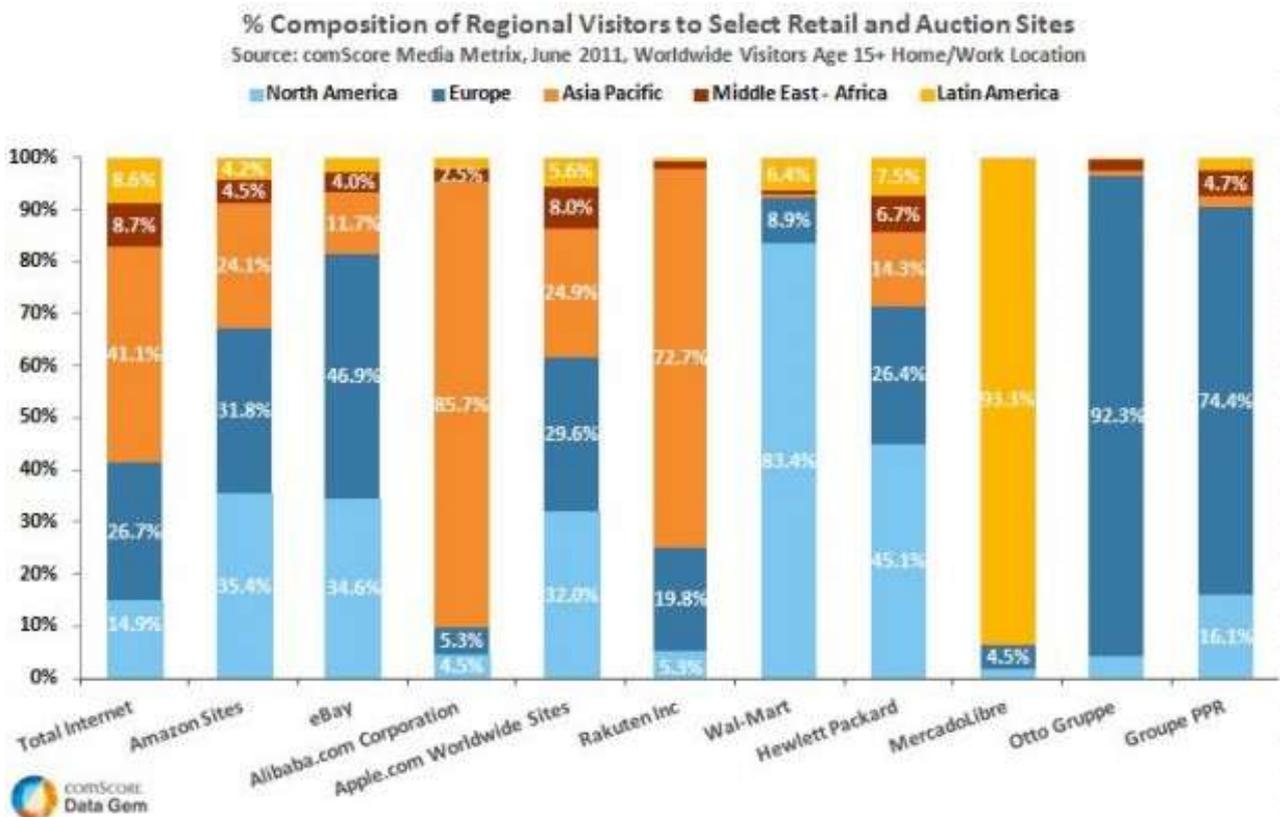
Comscore datamine, August 2012. (Report outline)

Global Audience Analysis for Top Retail Sites

A recent [comScore report](#) analyzed some of the largest global retail and auction sites with a specific look at how these sites are penetrating various geographic regions. Among destinations included in the study, Amazon Sites and Apple.com Worldwide Sites showed more globally distributed audiences compared to most other brands in the study. Amazon Sites attracted 35.4% of its audience from North America, while Europe contributed 31.8% of visitors and Asia Pacific accounted for 24.1%. Similarly, Apple.com Worldwide Sites attracted 32.0% of its visitors from North America, while Europe contributed 29.6% of visitors and Asia Pacific accounted for 24.9%.

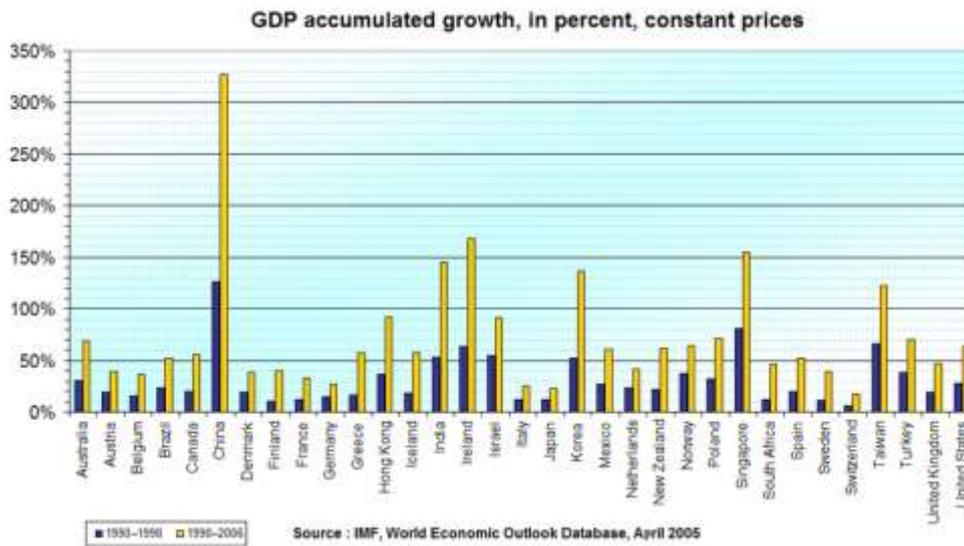
On the other hand, China’s Alibaba.com Corporation (85.7% and Japan’s Rakuten, Inc. (72.7%) reach sourced the vast majority of their traffic from the Asia Pacific region. Of the 10 selected sites, MercadoLibre showed the strongest concentration of visitors from a single region with 93.3% of its audience from Latin America, where it ranked as the top retail player in the region.

For the full study, please visit the [comScore website](#).



Figures 1) Appendix I)

**Global GBP accumulated 1990-1998, 1990-2006**



Figures 2) Appendix I)

**Zara SWOT Analysis**

	HELPFUL	HARMFUL
<b>INTERNAL</b>	<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Strong Branding (loyalty &amp; awareness)</li> <li>• Fulfill customer demand in affordable fashion,</li> <li>• Fast delivery of new products, design and trends</li> <li>• Cost leadership strategy by aiming at cost efficiency</li> <li>• Distribution efficiency by vertical supply chain</li> <li>• High frequency in the flagship stores by key location</li> <li>• Multi-channel strategy of Zara and</li> <li>• Expansion in new market (stores)</li> <li>• Extending online sales in existing market</li> <li>• IT with its preferences for speed and decision making</li> <li>• Financial performance (healthy liquidity, sales growth)</li> </ul>	<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Pressure of cost leadership strategy in consideration to achieve high quality standard</li> <li>• Short lead time (design to sale 15 days) focused on less colour variation, less pattern cuts and more size zero</li> <li>• Rapid growing effect a lack in E-commerce</li> <li>• Higher costs from vertical integration</li> <li>• Risk of single centralization</li> <li>• Cost up in overseas distribution, R&amp;D, labour</li> </ul>
<b>EXTERNAL</b>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• Global expansion in key market as Asia, America etc.</li> <li>• Expansion in e-commerce platforms</li> <li>• Grow revenue channels in new markets by launching of an online store in China, America etc.</li> <li>• Store differentiation (no mono look; creativity design)</li> <li>• Company image and engagement for environment, social, labour and product dimension</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Exchange rate fluctuation</li> <li>• Expansion strategy regarding market entry barriers</li> <li>• Changing in customer demand (price sensitive / trends)</li> <li>• New competitors (local and global)</li> <li>• Product cannibalism by introducing a new product (destroy its own current bestseller before a rival does)</li> <li>• Long term success in a competitive fast growing business requirements strong organic growth ability</li> <li>• Group performance pressure to deliver high performance (focus on short term perspective)</li> </ul>

Figures 3) Appendix I)

# Appendix II)

## Appendix II) Customer Experience in Online Shopping

### comSCORE, May 2012. (Report outline)

#### Introducing the *Online Shopping Customer Experience Study*

The *Online Shopping Customer Experience Study* provides insights into consumers' online shopping behaviors and preferences. Other online shopping surveys have focused on purchase or web usability, but this particular survey bridges that gap with a view of perceptions on customer experience from pre-purchase through post-delivery. This study also provides a clear picture of which shipping and post-purchase services enhance customer experience. Topics included are:

- ✓ What are the most/least important aspects of past online shopping experiences?
- ✓ What leads a site user to return to or recommend a site?
- ✓ What is important to consumers during the check-out process?
- ✓ What shipping services and options do consumers find most valuable?
- ✓ How important is tracking and what delivery services are preferred?
- ✓ What are consumers' returns experiences and what aspects are important in a returns process?
- ✓ How do all of the services offered during and after the online purchasing experience impact the overall impression of that online retailer?

The study analyzes the data from a comScore survey of more than 3,100 U.S. online shoppers conducted in February 2012. All shoppers surveyed had to meet the criteria of making at least two online purchases in a typical 3-month period. Additionally, an online focus group was held on January 12, 2012. Participants met in a virtual online forum where they were asked about a series of topics related to online shopping and logistics, including shipping and returns. This forum allowed participants to respond to online discussion questions as well as other participants' comments throughout the course of the focus group.

This report will provide retailers with the necessary insights into what steps they must take to satisfy their customers, thereby increasing customer loyalty as well as the lifetime value of customers.

#### Key Findings

While online shoppers are generally very satisfied, there is room to improve their satisfaction related to shipping and returns. While free shipping is a great motivator, drawing shoppers back to sites to make repeat purchases and causing shoppers to recommend an online retailer, consumers are willing to pay a nominal fee for getting their product faster. When comparison shopping, consumers take product price and shipping charges almost equally into consideration.

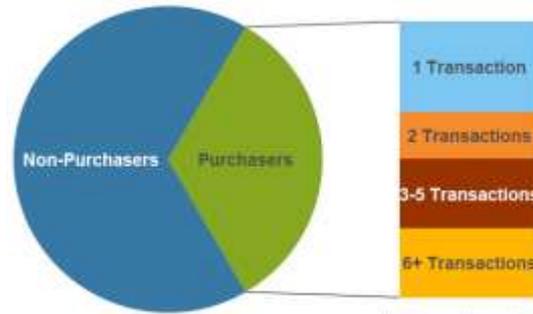
There are several other things that retailers can do to improve the experience for their online shoppers. The first is to communicate the expected delivery date of the order; customers are willing to wait for their orders but want to know just how long that might be. Timely arrival of shipments encourages shoppers to recommend an online retailer. Consumers also like having tracking updates and delivery notifications to understand when their package is arriving. Online shoppers want flexibility in their shipping, particularly the ability to give special delivery instructions or schedule a delivery time or select an alternate delivery location.

Online shoppers that have made returns prefer to have a preprinted return label in their original package or access to an easy-to-print label. Having to pay for return shipping negatively impacts the overall returns experience. A lenient and clear returns policy is likely to lead to recommendations and repeat business from online shoppers, while reducing shopping cart abandonment.

### Online Shopping Industry Snapshot

About 75 million people, or one-third of the total Internet population, buy goods online to be shipped to them over the course of a quarter. Of those, about one-third make 1 transaction and half make 1-2 transactions. About a quarter make 3-5 purchases, and the other quarter make 6 or more.

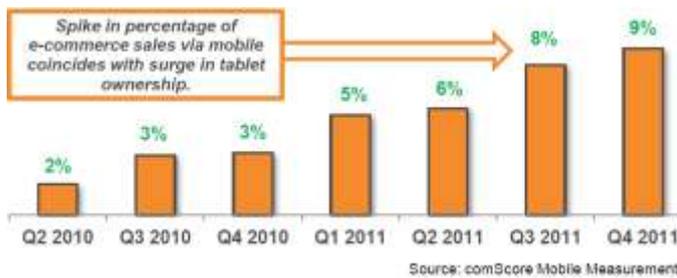
### Total U.S. Internet Population – Purchasers of Shippable Goods



Source: comScore e-Commerce Measurement

Figures 1) Appendix II)

### Percentage of Total e-Commerce Dollars Spent via Mobile or Tablet Device



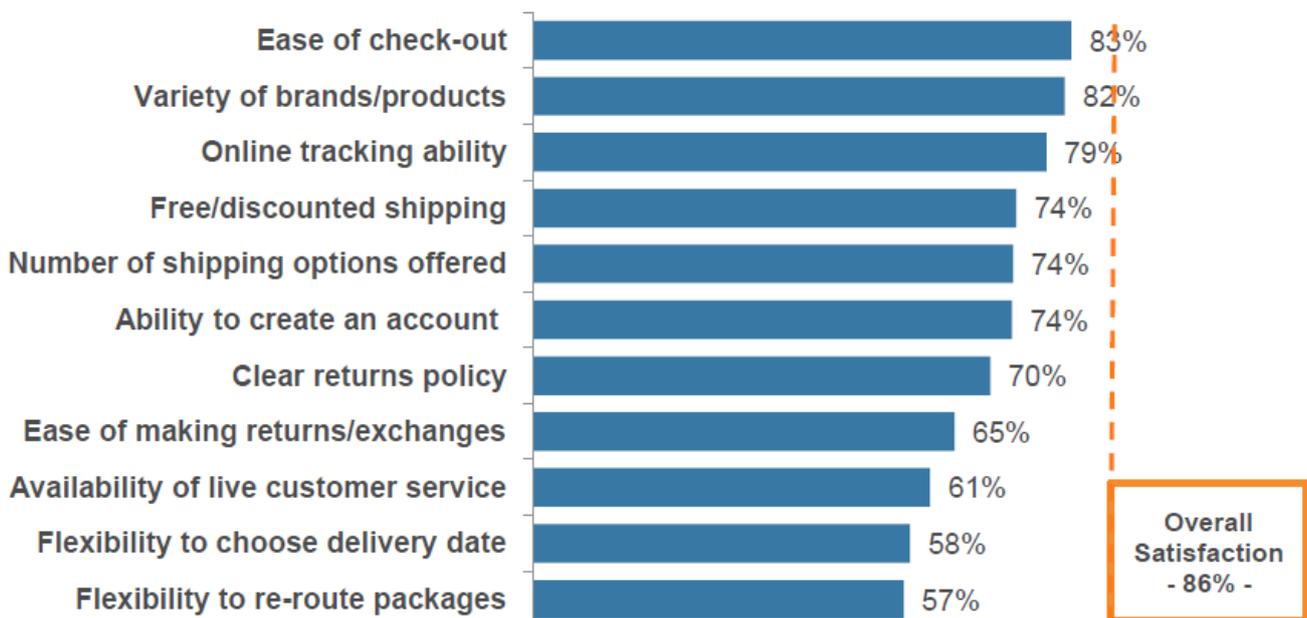
Figures 2) Appendix II)

Mobile and tablet e-commerce has exploded in the past year. At the end of 2010, mobile e-commerce was 3% of total e-commerce. Just a year later, mobile e-commerce was 9% of e-commerce. Retailers must move quickly to adopt these new platforms to meet the evolving expectations of savvy consumers.

### Online Shopping Experience and Satisfaction

Consumer satisfaction with online shopping overall is high, at 86%. Online shoppers are most satisfied with ease of check-out (83%), variety of brands/products (82%), and online tracking ability (79%). Online shoppers are least satisfied with flexibility of shipping, including flexibility to choose delivery date (58%) and re-route packages (57%), and the ease of making returns and exchanges (65%). In addition to ease of making returns and exchanges, there is also room to improve customer satisfaction by having a clear returns policy. Logistics services can directly impact 6 out of 11 of the aspects that influence a customer’s shopping experience.

### Satisfaction with Aspects of Online Shipping Experiences



Base= Total Respondents (n=3,128)

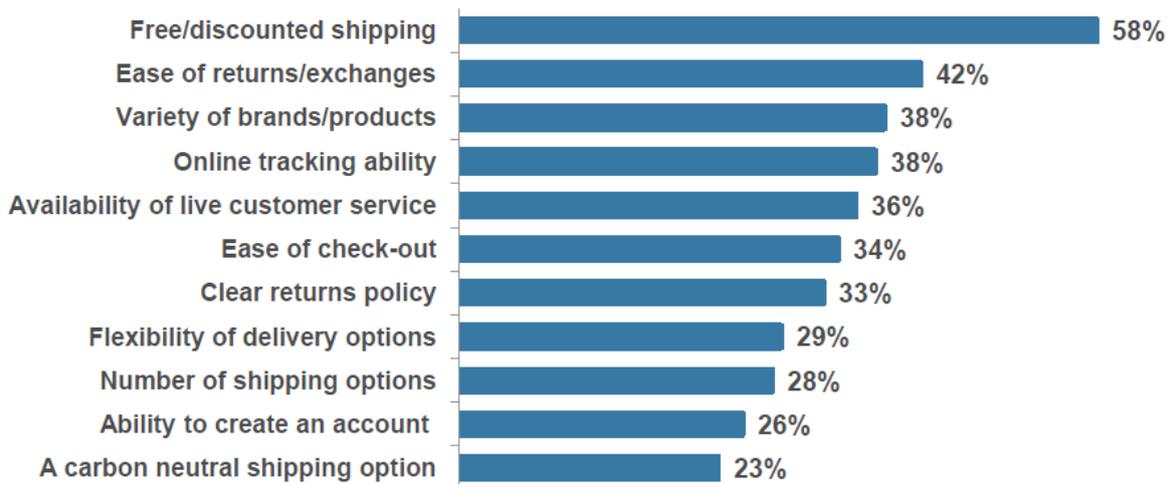
Figures 3) Appendix II)

**Quadrant Analysis**



Figures 4) Appendix II

**Aspects Shoppers Want to See Improved by Retailer**



Base= Total Respondents (n=3,128)

Figures 5) Appendix II

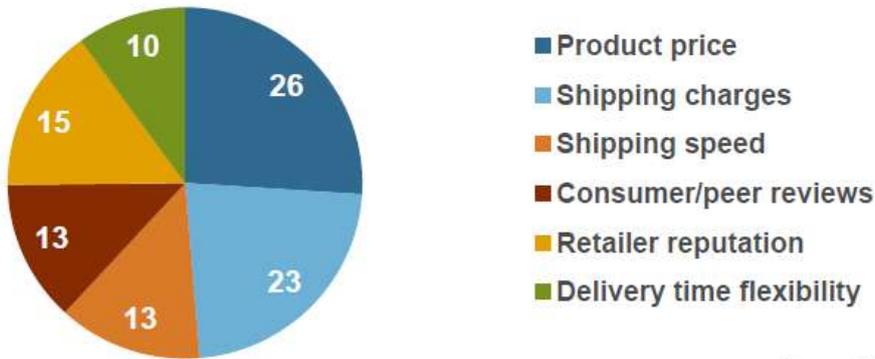
**Discounts/Specials That Bring Customers Back to Retailer**



Base= Total Respondents (n=3,128)

Figures 6) Appendix II

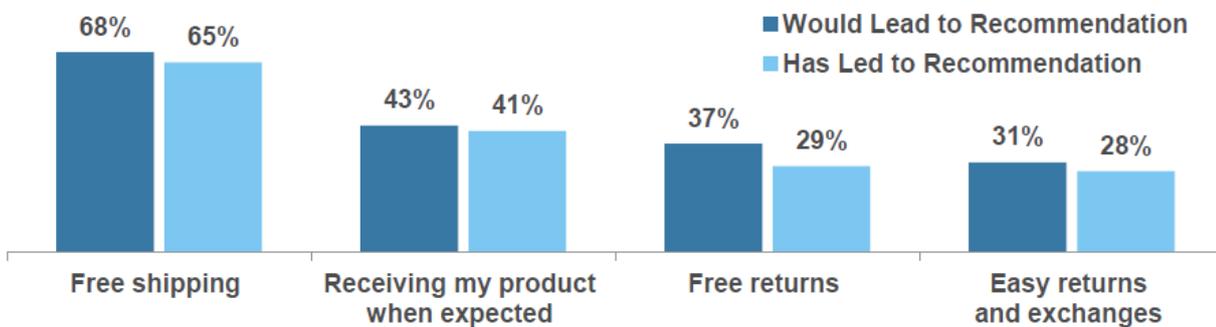
**Factors Taken into Consideration When Comparison Shopping**



Base= Total Respondents (n=3,128)

Figures 7) Appendix II)

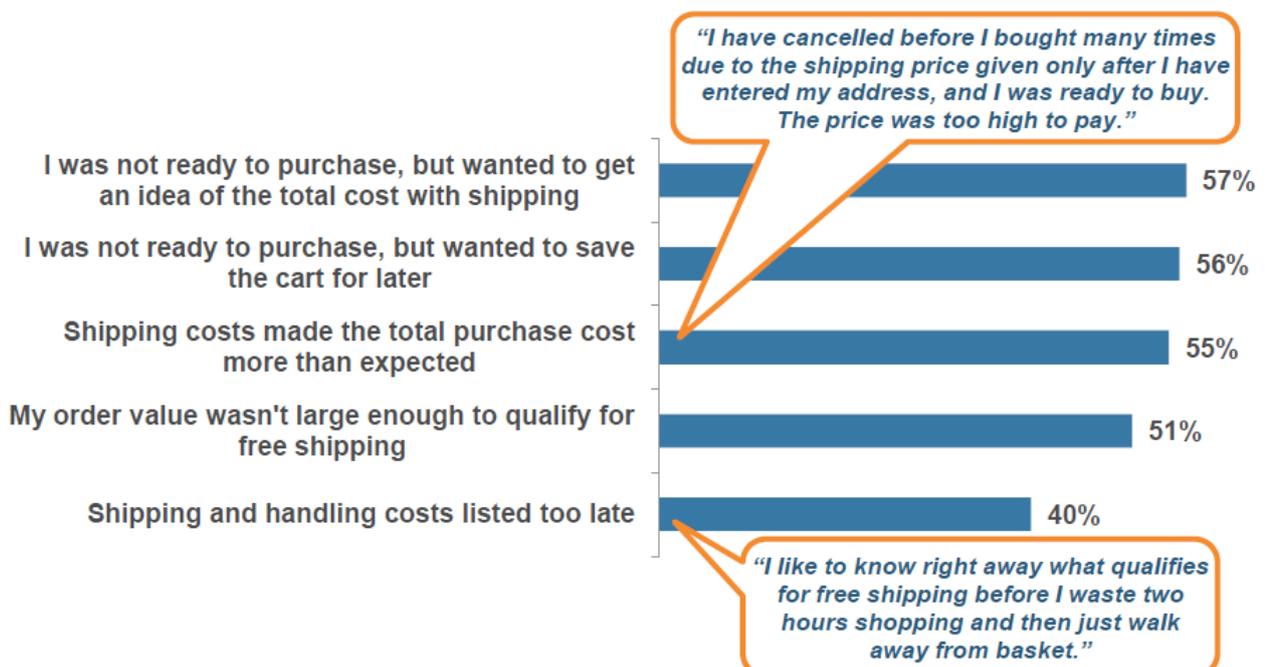
**Recommendation of Online Retailers – Top 4 Factors –**



Base= Total Respondents (n=3,128)

Figures 8) Appendix II)

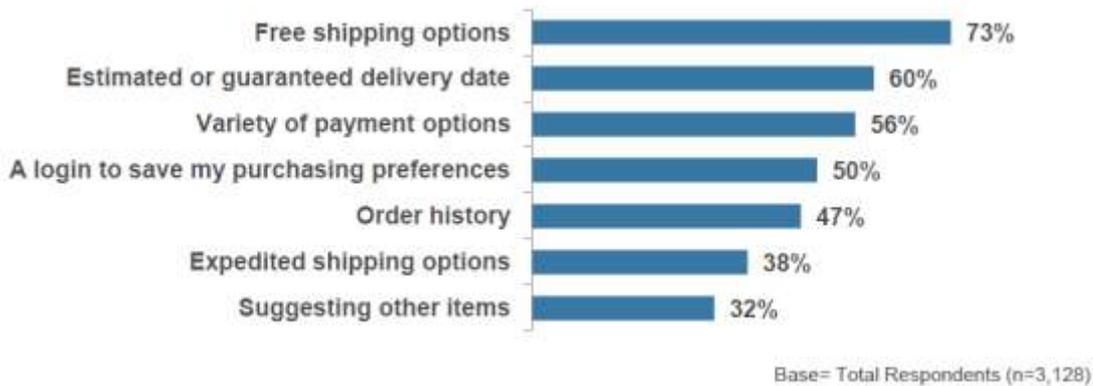
**Reasons for Abandoning Shopping Cart**



Base= Respondents that have abandoned their cart (n=2,625)

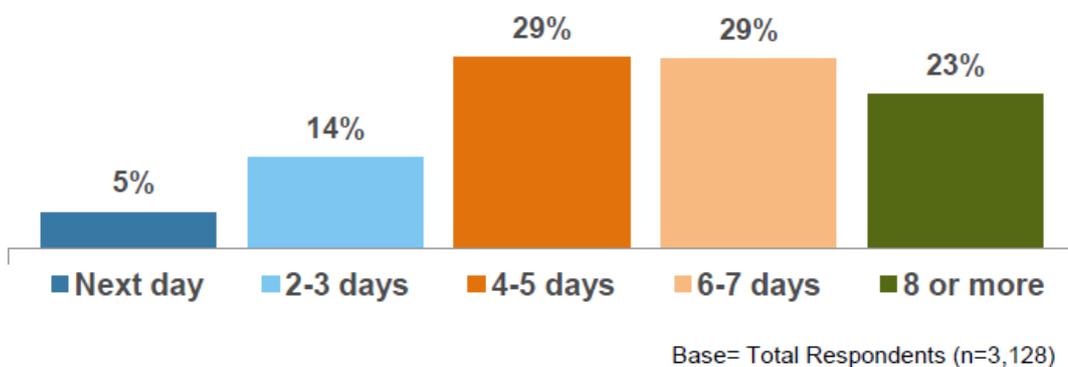
Figures 9) Appendix II)

### Important Information/Options at Check-out



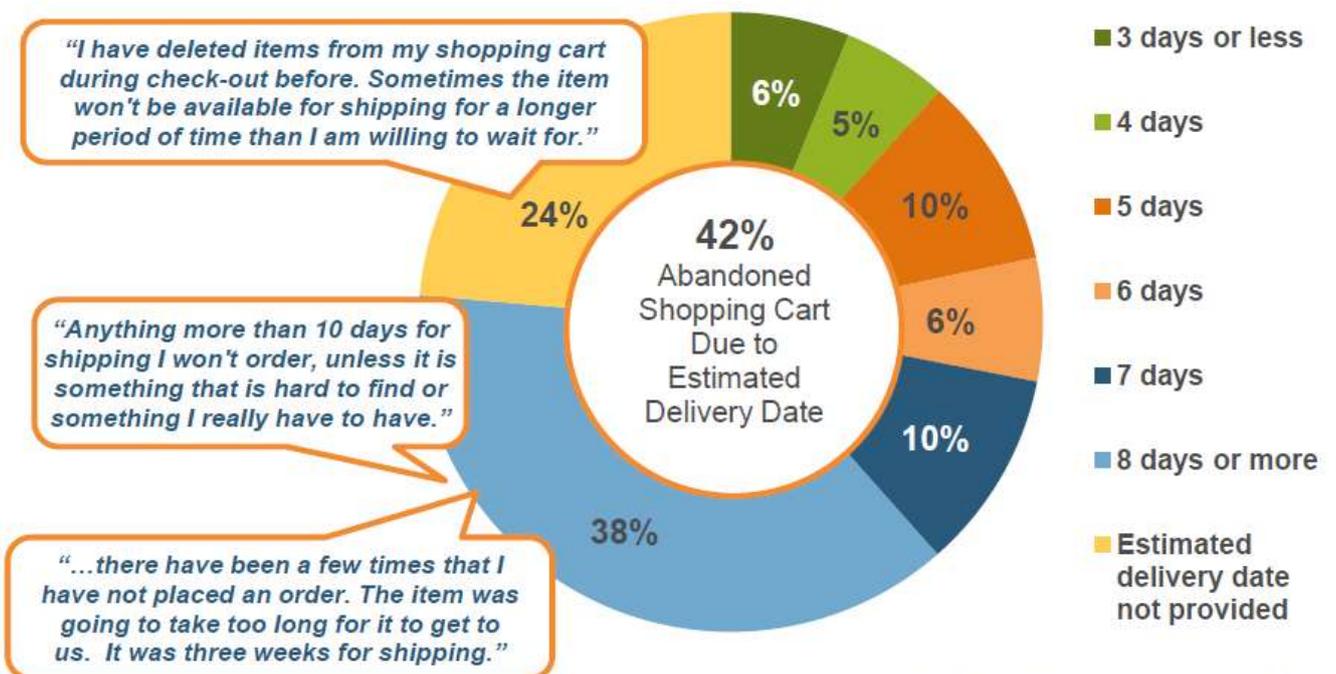
Figures 10) Appendix II)

### Days Willing to Wait for Most Purchases



Figures 11) Appendix II)

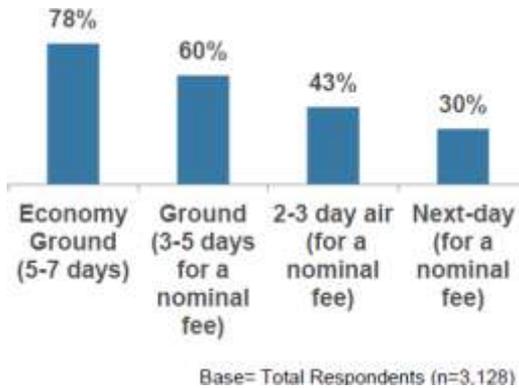
### Estimated Delivery Time Provided (of those who abandoned their cart due to delivery date)



Base=Total Respondents (n=3,128)/Respondents that abandoned due to delivery date (n=1,331)

Figures 12) Appendix II)

**Shipping Options Expected**



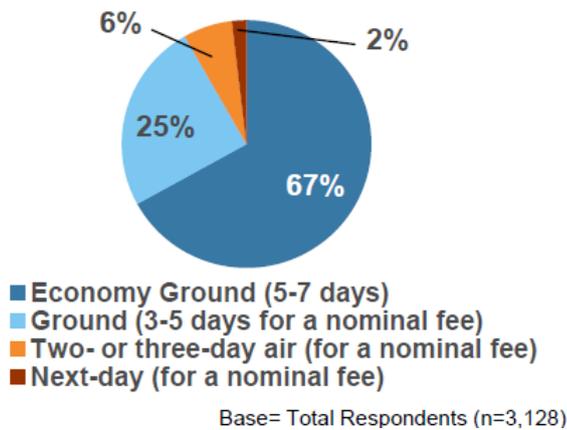
Figures 13) Appendix II)

**Most Important Shipment Tracking Service**



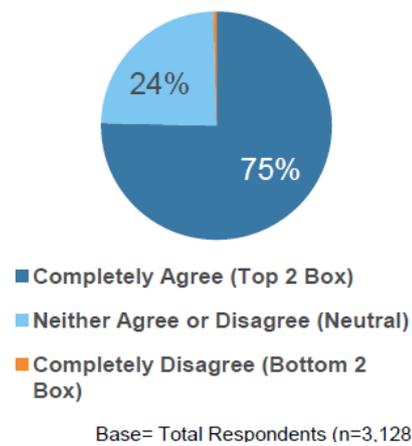
Figures 14) Appendix II)

**Shipping Option Actually Chosen Most**



Figures 15) Appendix II)

**"Giving me tracking information for my packages is an important service every retailer should offer"**

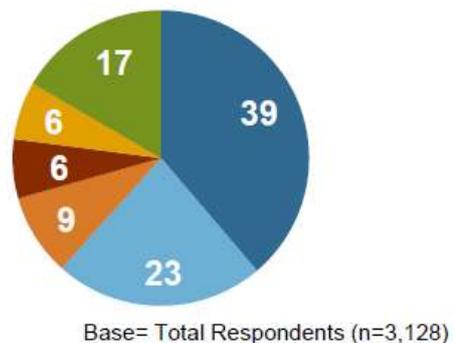


Figures 16) Appendix II)

**Most Convenient Services While Waiting for Delivery**

*Average # of Chips Allocated out of 100*

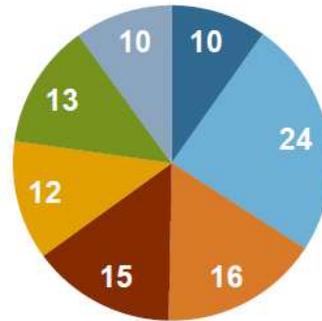
- Get instant e-mail/text delivery alerts
- Authorize delivery – no need to be home
- Reschedule a delivery in route
- Select a 2-hour delivery window
- Re-route to an alternative address
- None of the above



Figures 17) Appendix II)

**Factors Enhancing Purchasing Experience for Valuable/Important Purchases**  
*Average # of Chips Allocated out of 100*

- Hold delivery to pick up at an authorized shipping location
- Automatic delivery notifications via e-mail/text
- Express 1-2 day air delivery option
- Shipping insurance
- Choose adult signature authorization required on delivery
- Request a 2-hour delivery window on delivery day
- Re-route the delivery to a preferred location

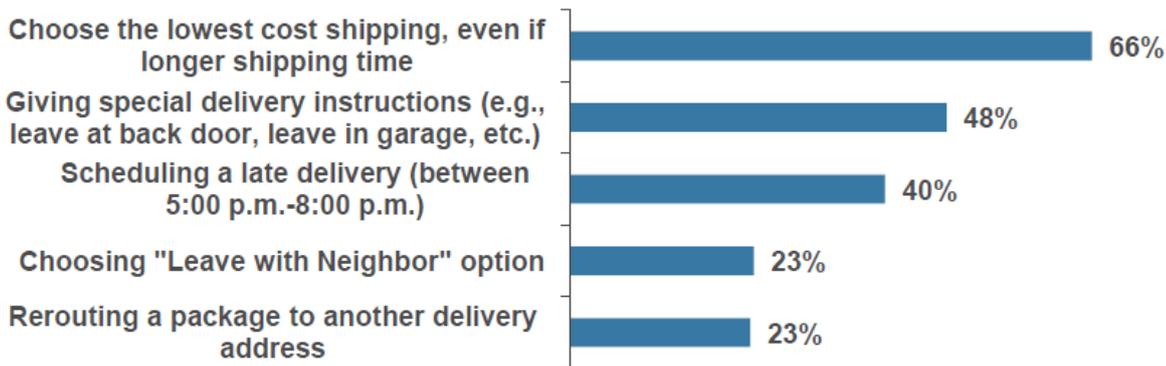


Base= Respondents indicating that value/cost of purchase influences shipping option (n=2,277)

Figures 18) Appendix II)

**Most Preferred Flexible Shipping Service**

– Ranked #1 or #2 –



Base= Total Respondents (n=3,128)

Figures 19) Appendix II)

**Look for an Online Retailer's Return Policy ...**



Base= Total Respondents (n=3,128)

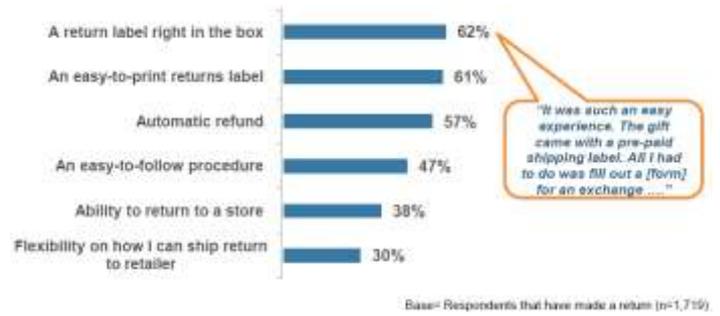
Figures 20) Appendix II)

**If an Online Retailer Offers a Lenient, Easy-to-Understand Returns Policy, I Will ...**



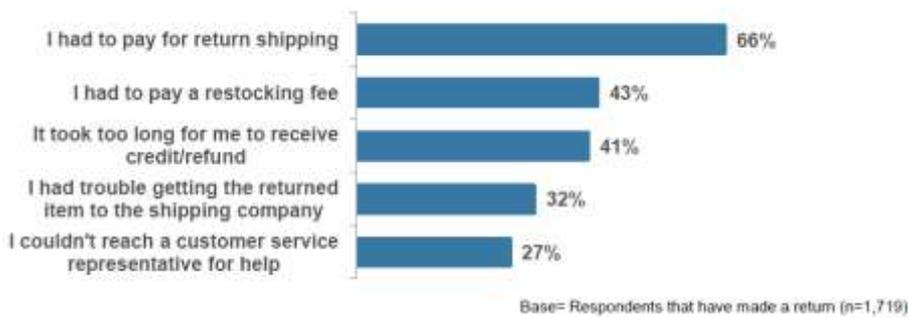
Figures 21) Appendix II)

**Elements of the Best Returns Experience**



Figures 22) Appendix II)

**Issues Faced in Previous Returns Experience**



Figures 23) Appendix II)

**Conclusions**

While free and discounted shipping is a big story, there is more to online shopping and the customer experience. In fact, many shoppers are willing to pay a nominal fee to receive the product faster if given the option. Shipping and delivery timing is important during check-out – it's all about communication!

To reduce shopping cart abandonment, retailers should show the shipping costs, present how much more should be purchased to get free shipping, and give consumers the option of shipping time frames. Customers are willing to wait for their packages, but need to know what is happening – they want estimated delivery time clearly stated and they want e-mail or text alerts about their delivery.

Also important to the customer is the feeling of control. Options such as “special delivery instructions,” the ability to schedule a late delivery, or having a delivery window give the consumers the control they need to better their shipping experience.

Finally, good experiences with returning items leads to repeat customers and recommendations for the retailer. Good returns experiences are marked by ease for the consumer, while the bad experiences highlight hassles and the extra cost required.

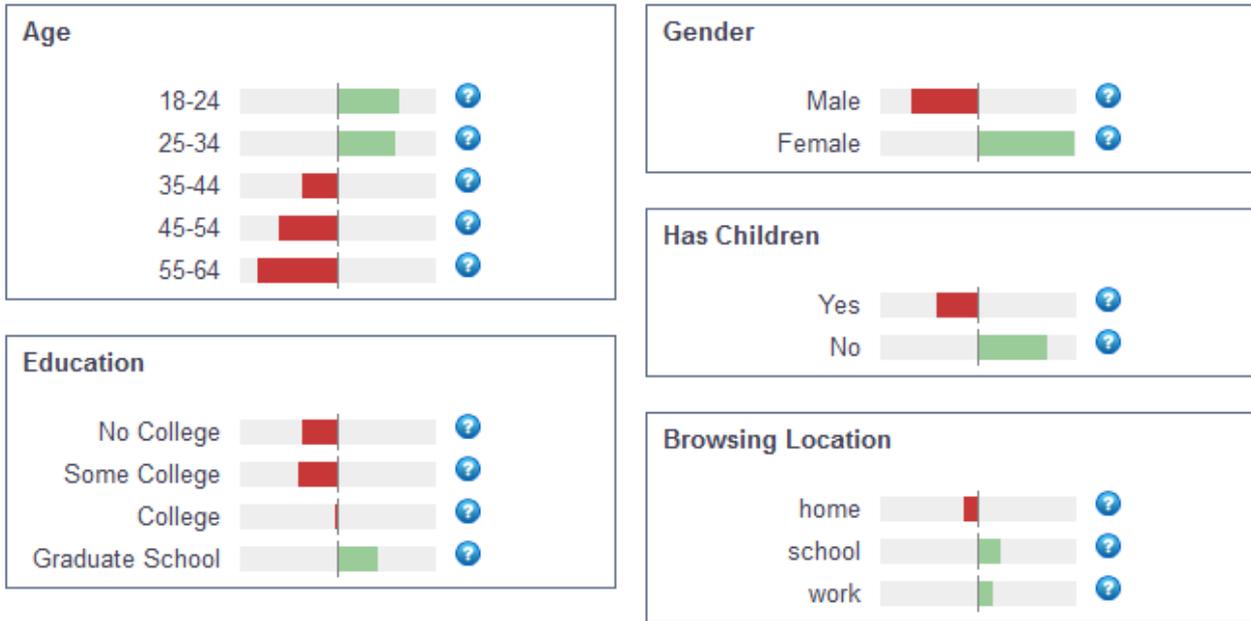
# Appendix III)

Appendix III) Customer Analytical Research of Zara.com

Alexa, August 2012. (online research outline)

**Audience Demographics for Zara.com**

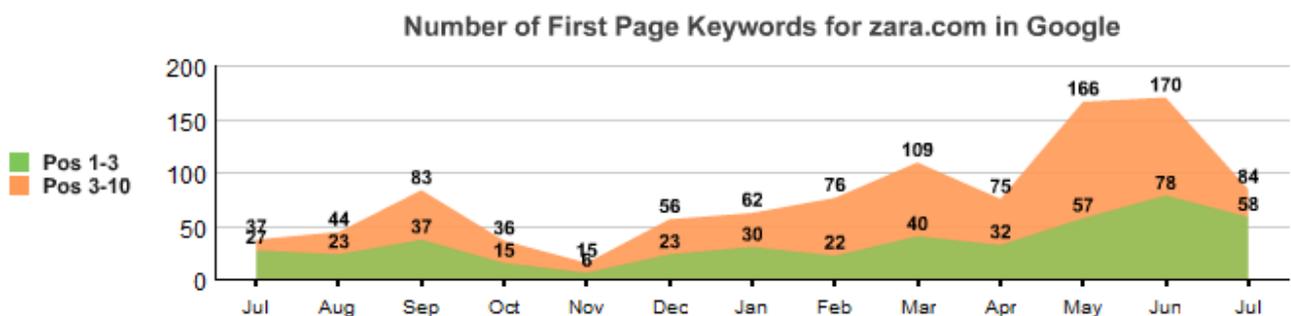
Relative to the general internet population how popular is zara.com with each audience below?



**Advanced Demographics for zara.com**

Audience breakdown by income, ethnicity, age, education, gender, children and browsing location.

Figures 1) Appendix III)



Figures 2) Appendix III)

### Visitors by Country for Zara.com

Country	Percent of Visitors
 Spain	11.2%
 United States	10.6%
 United Kingdom	8.1%
 France	7.7%
 Germany	6.6%
 China	4.3%
 Italy	3.7%
 Poland	3.3%
 Japan	3.2%
 Netherlands	2.8%
<a href="#">More</a>	



Figures 3) Appendix III)

# Appendix IV)

Appendix IV) Competitors Analytical Research of Zara.com

Alexa, August 2012. (online research outline)

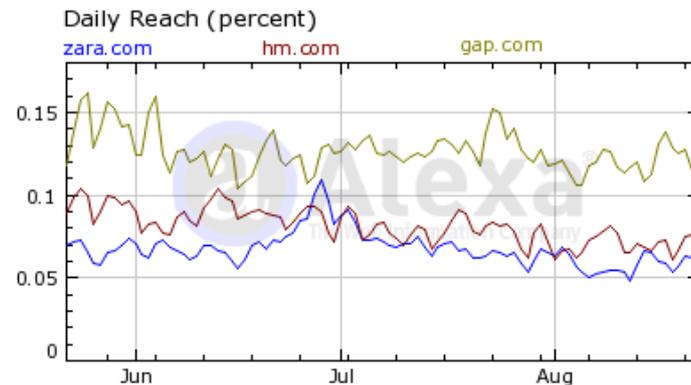
Figures 1) Appendix IV) :



Traffic rank for zara.com:

	Traffic Rank	Change
<b>Yesterday</b>	1,645	+8 ↓
<b>7 day</b>	1,597	-36 ↑
<b>1 month</b>	1,567	+219 ↓
<b>3 month</b>	1,440	-12 ↑

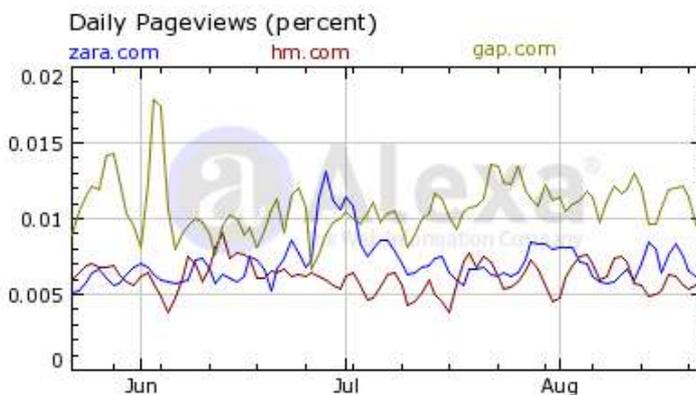
Figures 2) Appendix IV) :



Estimated percentage of global internet users who visit zara.com:

	Reach %	Change
<b>Yesterday</b>	0.060%	+1% ↑
<b>7 day</b>	0.059%	+5% ↑
<b>1 month</b>	0.0596%	-21.11% ↓
<b>3 month</b>	0.0674%	-2.41% ↓

Figures 3) Appendix IV) :



Estimated percentage of global pageviews on zara.com:

	Pageviews %	Change
<b>Yesterday</b>	0.0058%	-7.94% ↓
<b>7 day</b>	0.00687%	+4% ↑
<b>1 month</b>	0.00703%	-20.46% ↓
<b>3 month</b>	0.00713%	+5.2% ↑

Figures 4) Appendix IV) :



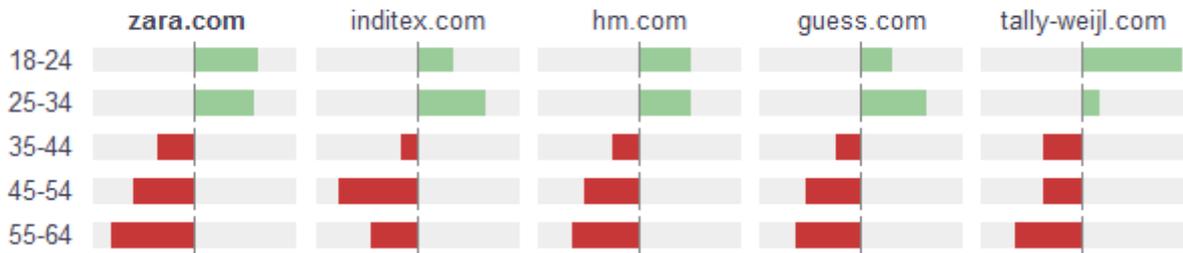
Estimated daily time on site (mm:ss) for zara.com:

	Time on Site	Change
<b>Yesterday</b>	6:09	-14% ↓
<b>7 day</b>	6:46	-1% ↓
<b>1 month</b>	6:44	-1% ↓
<b>3 month</b>	6:37	+2% ↑

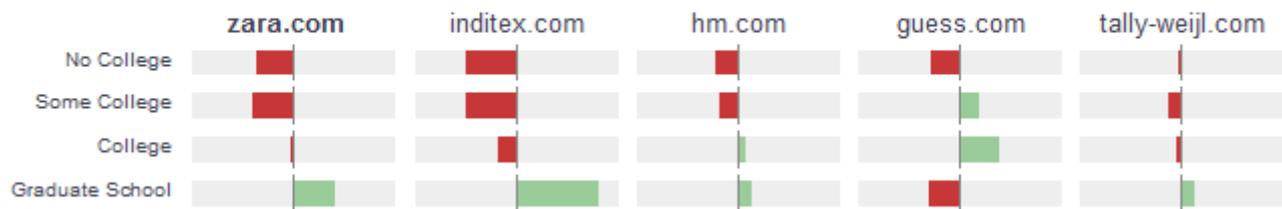
**Advanced Demographics for zara.com - Audience breakdown by category.**

Figures 5) Appendix IV) :

**Age** Education Gender Has Children Browsing Location Income Ethnicity



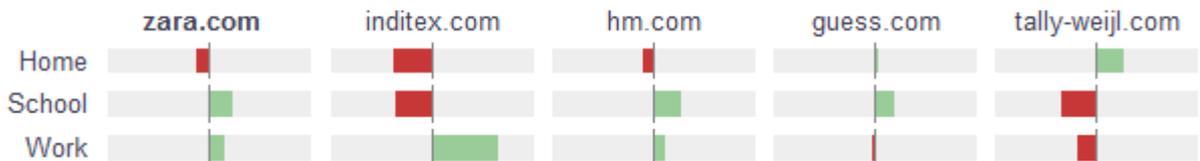
Age **Education** Gender Has Children Browsing Location Income Ethnicity



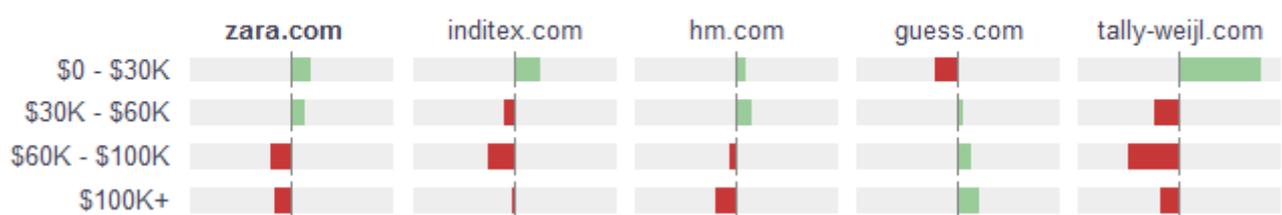
Age Education **Gender** Has Children Browsing Location Income Ethnicity



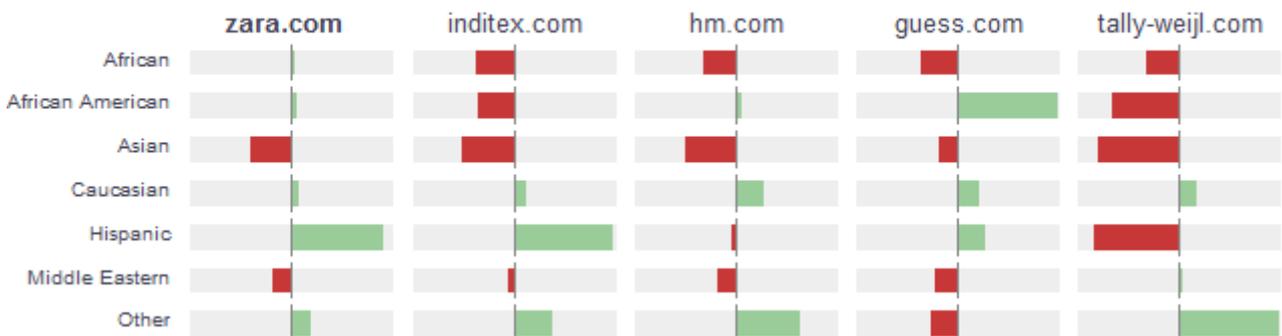
Age Education Gender Has Children **Browsing Location** Income Ethnicity



Age Education Gender Has Children Browsing Location **Income** Ethnicity



Age Education Gender Has Children Browsing Location Income **Ethnicity**



# Appendix V)

## Appendix V) Zara Online-Shop Comparison

### Zara Online-Shop, August 2012. (outfit research)

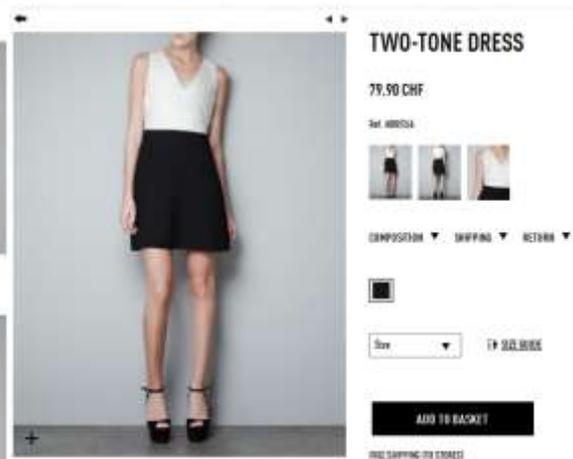
QUALITIES ▾ CHARACTERISTICS ▾ COLOUR ▾ SIZE ▾ PRICE ▾ 57 PRODUCTS



3P FRONT JUMPSUIT 79.90 CHF



TWO-TONE DRESS 79.90 CHF



Figures 1) Appendix V)

Figures 2) Appendix V)

	STUDDED MID HEEL ANKLE BOOTS Ref. 175118111/10702	SAND	35	1	118.80 CHF	X
	RACER BACK DRESS Ref. 077228044/20102	DEEP BLUE	3	1	75.90 CHF	X
	ROBOTS DRESS Ref. 075210444/21102	OFF WHITE	3	1	59.90 CHF	X
Total products: 1,015.70 CHF Estimated shipping costs: 0.80 CHF					<b>TOTAL 1,015.70 CHF</b> <small>* VAT included</small>	

Figures 3) Appendix V

### PROCESS ORDER

1. SHIPPING 2. PAYMENT

#### SHIPPING METHOD.

- Pick-up in store: In the store of your choice in 4-6 working days. Free
- Standard: In 4-6 working days. 7.95 CHF
- Express: In 2-3 working days. 17.95 CHF

INVOICE ADDRESS

SHIPPING ADDRESS

Figures 4) Appendix V

### 13. EXCHANGES/RETURNS POLICY

#### Returns in the exercise of the right to cancel your purchase

**General policy:** If You wish to cancel the Contract within the period specified in Clause 7 above, You can make a return to us at any of the ZARA stores in your country or by giving the products to the courier arranged by us. You should send the product in the same package received by following the directions on the "RETURNS" section of our website. You should contact us through our web form to arrange for the product to be collected at your home address. Neither option will entail any additional cost to You. You

#### 7. YOUR RIGHTS TO CANCEL "COOLING OFF".

If You are contracting as a consumer, You may cancel a Contract at any time within 3 days, as of the confirmation of the dispatch of your order. In this case, You shall receive a full refund of the price paid for the products in accordance with our Returns Policy (see below Clause 13).

Figures 5) Appendix V

H&M Online-Shop, August 2012. (outfit research)

**Neuer Look**

- Strumpfhose 12.90
- Stiefeletten 69.90
- Rock 39.90
- Bluse 39.90
- Cardigan 29.90
- Armband 9.90
- Ohrhänger 14.90
- Tasche 29.90
- Tuch 14.90

**Total 262.10**

Passende Artikel: 133

Tuch 14.90	Cardigan 29.90	Shirt 19.90
Bluse 39.90	Cardigan 29.90	Ohrhänger 14.90
Rock 39.90	Shirt 29.90	Gürtel 14.90

< 6/15 >

Figures 6) Appendix V

**New Look I**

- Strumpfhose 12.90
- Stiefeletten 69.90
- Rock 39.90
- Bluse 39.90
- Cardigan 29.90
- Armband 9.90
- Ohrhänger 14.90
- Tasche 29.90
- Tuch 14.90

**Total 262.10**

Figures 7) Appendix V

Passende Artikel:

**QUICKLOOK**

Trenchcoat  
69.90

Farbe: kariert

Artikel entfernen

Trenchcoat  
69.90

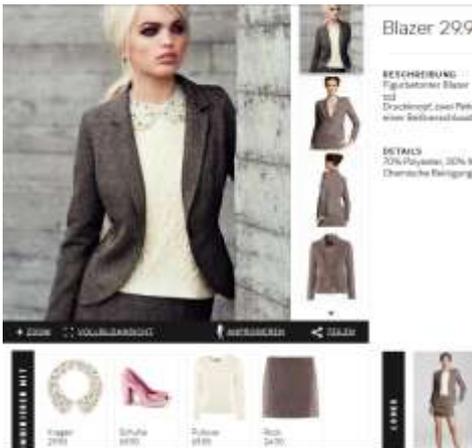
Figures 8) Appendix V

**New Look I**

- Strumpfhose 12.90
- Stiefeletten 69.90
- Rock 39.90
- Bluse 39.90
- Cardigan 29.90
- Handschuhe 14.90
- Armband 9.90
- Trenchcoat 69.90
- Ohrhänger 14.90
- Sonnenbrille 24.90
- Tasche 29.90
- Tuch 14.90
- Schal 39.90

**Total 411.70**

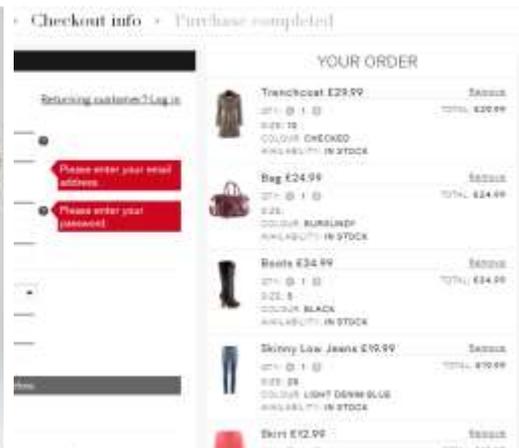
Figures 9) Appendix V



Figures 10) Appendix V



Figures 11) Appendix V



Figures 12) Appendix V



Figures 13) Appendix V



Figures 14) Appendix V



Figures 15) Appendix V



Figures 16) Appendix V

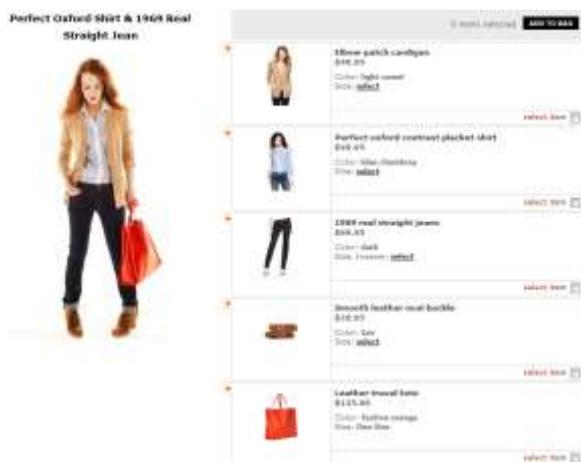
GAP Online-Shop, August 2012. (outfit research)



Figures 17) Appendix V



Figures 18) Appendix V



Figures 19) Appendix V



Figures 20) Appendix V



Figures 21) Appendix V



Figures 22) Appendix V



Figures 23) Appendix V



Figures 24) Appendix V

ZALANDO Online-Shop, August 2012. (outfit research)

Alle Filter zurücksetzen

**Kategorie**

- Bekleidung (1059)
  - Kleider (395)**
    - Sommerkleider (147)
    - Jerseykleider (119)
    - Cocktailkleider (79)
    - Strickkleider (33)
    - Blusenkleider (46)
    - Etui kleider (19)
    - Jeanskleider (2)
    - Maxikleider (20)
  - Jacken (20)
  - Mäntel (4)
  - Pullover & Strickjacken (111)
  - Shirts & Tops (138)
  - Blusen & Tuniken (121)
  - Jeans (2)
  - Hosen (25)
  - Röcke (37)
  - Wäsche (35)
  - Strümpfe (21)
  - Sportbekleidung (141)
  - Bademode (81)

**Weitere Kategorien**

- Schuhe (282)
- Sports (210)

**Größe** **Farbe** Zurücksetzen **Marke** **Preis**

Größe wählen Marke wählen

9 € - 750

**Unsere Topseller**

<b>Four Flavor</b> Cocktailkleid - pink / stone 59,90 €	<b>Benetton</b> Jerseykleid - fantasie 54,95 €	<b>Jane Norman</b> FLORAL PROM - Kleid - multi <del>69,95 €</del> 49,95 €	<b>Paprika</b> Cocktailkleid - cream 49,95 €

**Kleider bei Zalando: (395 Artikel gefunden)**

Sortieren nach: Beliebteste

1 2 3

Figures 25) Appendix V

**News & Style**

**BEUTE**

LOOKS  
TRENDS  
GUTS  
STREIFIGES  
STYL-KLASSIKER  
STRAKTIFUL

**WICHTIGES**

TRIMMIGES  
GUTER WIRTE  
NACHWEISEN  
FESTHALT FARBEN  
WILDERSTILES  
VOYAGE, VOYAGE  
HANDMADE

**NEWS**

FUSION & BEAUTY  
SOCIETY  
ARTISAN  
AUTOMATEN

**TIPS**

STYL-TEST  
SUNDAY SPECIAL  
PARFUM TEST  
FITNESS-GUIDE

**Pastell**

Die farliche Pastellblau erhalten mit langem einander  
Temperaturer eine kühle Note. Flanieren in zurückhaltenden Rose,  
frischem Mint und eleganten Blau sind jetzt angelegt

Figures 26) Appendix V

**BAUHAUS BUSINESS**

Diese farblich abgestimmten Ensembles eignen sich für alle occasions - sondern auch trendige Looks im Büro. Die Kombination Schwarz mit Nadel oder Grau, lässt sich außerdem vielseitig kombinieren - ob fürs Lunch-Date oder fürs Meeting.

**ZUM SHOPPEN**

zurück zu Art 144,80 €  
Lace-Modell 80,00 €  
Sign 89,95 €  
Nike Performance 79,95 €  
Anker

Figures 27) Appendix V

**Auf Lager!**

Auf den Wunschzettel Artikel entfernen

**Milly Etuikleid - ecru/ black**

Artikelnr.: M1221CD0N-858

**Auf Lager!** Noch 2 Artikel verfügbar

Auf den Wunschzettel Artikel entfernen

schwarz S (4) 1 459,95 €

Voraussichtliche Lieferung dieser Artikel per DHL: Montag, 27. August 2012  
Die Vorabzahlung einen Werktag nach Zahlungseingang.

Versand 0,00 €  
**Gesamtsumme: 684,75 €**  
inkl. MwSt

Schnelle Lieferszeiten  
Kauferschutz  
Datenschutz

100 Tage Rückgaberecht  
Sichere Zahlung mit SSL-Verschlüsselung

Gutschein-codes können Sie im letzten Bestellschritt "Bestätigen" einlösen.

Weiter Einkaufen

Freitag, 24. August 2012

Figures 28) Appendix V