How Consumers' Response on CSR Affects Brand Competitiveness in the Fast Fashion Industry—— Case Study of Zara (Inditex) and H&M

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Abstract: This research is to examine how consumers' response on CSR affects brand competitiveness. A case study of Zara and H&M is conducted to compare brand CSR practices and brand competitiveness. In addition, a qualitative questionnaire research is designed to collect consumers' response on CSR, as well as their brand preference and purchasing behaviour, which directly indicate brand competitiveness. The research finds that Zara is more competitive although H&M has done better in CSR. Consumers' response on CSR has a moderate effect on brand competitiveness, while the competitive factors in the fast fashion industry rank from design, price to quality, and finally CSR. Besides, consumers' response on CSR benefits brand competitiveness by positively prompting brand equity, and negatively impacting competitors' competitiveness through CSR's spillover effect on non-CSR competitors. Moreover, negative CSR is found to have more serious influence on brand competitiveness than positive CSR. Gender difference is found that male customers are more social CSR oriented, while female customers are more environmental CSR oriented. Secondly, female customers are more susceptible to CSR, while male customers have less confidence on brands' CSR initiatives.

Keywords: CSR, Brand Competitiveness, Fast Fashion Industry

1. Introduction

There have always been CSR issues, such as environmental pollution and labour abuse, in the fast fashion industry. And CSR is being paid more and more attention in brand strategy by fast-fashion brands (such as Zara, H&M, GAP), in order to increase brand competitiveness (Li, Zhao, Shi, & Li, 2014). Many studies are conducted to examine the relationship between CSR and competitiveness (such as Vilanova, Lozano, & Arenas, 2009). But few of them research on CSR's impact on brand competitiveness directly from consumers' perspective. Therefore, this research is to find out how consumers' response on CSR affects brand competitiveness in the fast fashion industry. Firstly, literatures are reviewed to build relationship between consumers' response on CSR and brand competitiveness, and to explore specific research questions based on existing discussions on relating topics. Then, Methodology including case study, questionnaire and research ethic are discussed. Finally, the report unfolds the findings include a case study of two brands Zara (Inditex) and H&M (H&M Group), and relating data analysises answering the research question.

2. Literature review

2.1. CSR affects brand equity

CSR is argued important as an "inescapable priority" for business (Porter & Kramer, 2006). McWilliams and Siegel (2001) define CSR as actions beyond the interest of corporates for social goods, and actions legally required. Proactive CSR is classified roughly into three dimensions, economic, social and environmental (Torugsa, O'Donohue, & Hecker, 2013). The main CSR issues in the fast fashion industry are social problems towards employees (Perry & Tower, 2013) and supply chains, mainly in developing and low labour cost countries (Karaosman, Morales-Alonso, & Grijalvo, 2015). The problems arose from the pursue of short lead time and clothe life cycle (Perry & Tower, 2013). Meanwhile, Bronn and Vrioni (2001) argued CSR as "caused related marketing", relating CSR' with brand interest.

Q1. Whether consumers perceive social issue as the most important CSR issue for fast fashion

companies?

Customers are sensitive to CSR initiatives, as they tend to question CSR as an excuse of profit (Plewa, Conduit, Quester, & Johnson, 2015). Customers' caution is explained by McWilliams and Siegel (2006) that, consumers are hard to tell the truth of CSR from "greenwashing".

Q2. To what extend is brand competitiveness affected by consumers' doubt on brands' CSR initiatives?

CSR is widely agreed to be beneficial to brand equity (Torres, Bijmolt, Tribó, & Verhoef, 2012; Hsu, 2012; Hur, Kim, & Woo, 2014). Brand equity is defined as "the total utility or value added to a product by virtue of the brand" (Yoo and Donth 2001, Torres et al., 2012). Brand equity involves two dimensions, perceptual equity (brand awareness, brand image, perceived quality) and behavioural equity (brand loyalty) (Myagmarsuren & Chen, 2011). According to Porter and Kramer (2006), CSR benefits brand equity perceptually, improving brand image and brand concept. Similarly, Lai et al. (2010) find that customers' perception of CSR contributes to brand awareness and brand association, whereas the relation of CSR and consumer behaviour, the behavioural dimension of brand equity, is weak (Hur et al., 2014).

Q3. Is there any difference in CSR's influence on consumers perceptual and behavioural brand equity?

According to, Saleh, Ebeid, & Abdelhameed (2015), CSR's effect on brand equity is to expand with improvement in customer awareness. However, research finds that general consumers' CSR perception is low in the fast fashion industry (Karaosman et al., 2015). It can be explained by that, customers are not well informed of brands' CSR practices, and improvement in CSR transparency and appropriate communication prompts CSR's credibility (Karaosman et al., 2015).

Q4. To what extend do consumers perceive CSR in the fast fashion industry?

2.2. Competitiveness estimated by brand equity

Competitiveness is defined as company's ability to outperform competitors by providing competitive advantages (Winzar, Baumann & Chu, 2018). According to Farquhar (1989), higher brand equity contributes to competitive advantages, including "opportunity for successful extensions, resilience against competitors' promotional pressures, and creation of barriers to competitive entry" (Lassar, Mittal, & Sharma, 1995). Raggio and Leone (2007) suggest that, brand equity (the value of the brand to customers) drives brand value (the value of the brand to the firm). Furtherly, with the Winzar et al.'s customer-based brand value–competitiveness value chain (see figure 1), since brand value can estimate brand competitiveness, brand competitiveness can be estimated by brand equity indirectly, at individual customers' level. The relationship clarification is shown in figure 2.
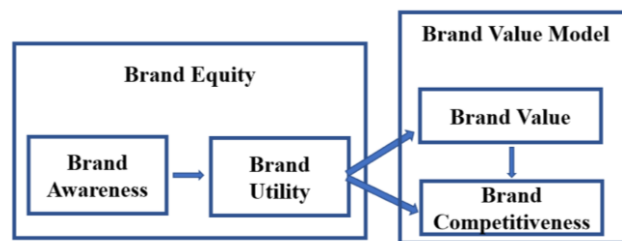

Figure 1: Customer Based Brand Value-Competitiveness (CBBV) value chain model (Winzar et al., 2018).
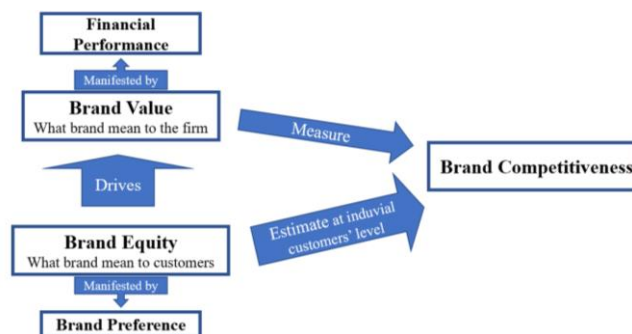

Figure 2: Relationship of brand equity estimating brand competitiveness (Winzar et al., 2018).

2.3. Consumers' response on CSR affects brand competitiveness

Since CSR affects brand equity, and brand equity can estimate brand competitiveness at individual customers' level, how consumers' response on CSR affects competitiveness is visible. On general, positive CSR affects customers' brand perception and brand evaluation (Hur et al., 2013) and furtherly influences brand competitiveness. On the one hand, positive CSR contributes to brand image building, and can furtherly induce positive word of mouth (Saleh et al., 2015), enhancing customer-based brand equity perceptually and behaviourally, increasing brand competitiveness. On the other hand, positive CSR can enhance brand competitiveness indirectly by CSR's spillover effects on competitors (Chen, Wen, & Luo, 2016), which decreases the customer-based brand equity of non-CSR competitors, weakening non-CSR competitors' competitiveness. Behaviourally, consumers are more likely to boycott companies with negative CSR practices, rather than rewarding companies perform good CSR (Mohr, Webb, & Harris, 2001).

Q5. Whether CSR's spillover effect on competitors affects brand competitiveness more than CSR's direct prompt on brand competitiveness?

Furthermore, Kahreh, Babania, Tive, & Mirmehdi, (2014) argues that female customers are more susceptible to CSR, indicating that brand competitiveness is more likely to be affected by CSR from female customers' stand. However, Calabrese, Costa, & Rosati (2016) suggest there is no significant gender difference in CSR perception. Moreover, CSR is not the determinant of consumers' purchasing decision (Mohr et al., 2001), and is therefore not the determinant of brand competitiveness.

Q6. Is there gender difference in the influence of consumes' response on CSR on brand competitiveness?

3. Methodology

This is inductive research to study how consumers' response on CSR affects brand competitiveness. A comparative case study of two multinational famous brand—Zara (Inditex) and H&M is conducted to examine brands' CSR performance and brand competitiveness. Since case study helps understand population features by specific examination from a smaller and concreter perspective, (Flyvbjerg, 2006), and this research aims to examine competitiveness, a comparative case study research is conducted. According to (Seawright & Gerring, 2008), the objectives of case selection is variation on the dimension of theoretical interest and representativeness. Since the companies of the two brands – Inditex and H&M are both retail giants with similar reputation, scales and commercial activities, they are comparable and representative. And the brand, Zara and H&M, the biggest brands of Inditex and the H&M Group, are well-known, and are therefore suitable to be used to gather customers' perspectives.

Customers' view and response on CSR is gathered by qualitative questionnaire research, which data is analysed interpretively. The questionnaire is designed based on literatures. And the. Firstly, CSR related questions in the questionnaire are classified into three dimensions of CSR, economic, environmental and social (Torugsa, 2013), with further consideration of the CSR situations in the fast-fashion industry. Furthermore, the questionnaire is designed to examine consumers' response on CSR perceptually and behaviourally (Myagmarsuren & Chen, 2012), including brand preference and purchasing behaviours, corresponding to the content of brand equity (Winzar, 2018).

3.1. Pilot study

A pilot study can help test the adequacy of the structure of the research and the feasibility of the study (Connelly, 2008). To make sure that the questionnaire can objectively indicates customers' views and response on CSR, a pilot study is conducted before we sent out the questionnaire. We firstly inducted an internal trial within our team, and revised questions as well as the sequences presented, to make sure that our respondents can understand the questions and they wouldn't be biased by the way we question. Then an external pilot trial in conveyed among random chosen schoolmates in and out of our major, as well as people who are not college students. The questionnaire was furtherly revised according to feedbacks received. Then the final questionnaire (see appendix 1) is published on social media to collect popular perspectives.

3.2. Ethics

The research tries every effort to protect the privacy and rights of our respondents. No personal information has been collected when answering the questionnaire. Only general data will be kept for pure research purpose and personal data will not be kept and looked at. Respondents were informed of the purpose of the questionnaire as well as the privacy and right guarantees.

4. Findings

4.1. Case study

4.1.1. Company Profile

Inditex

Inditex (Spanish) originated since 1963, is one of the biggest fashion retailers in the world, mainly profiting from offering latest fashion trend, or known as "fast fashion" (Inditex, 2020). Inditex sells in 202 markets, cooperating with 1,801 suppliers and 7,799 factories globally, earning €28,286 million net sales in 2019 (Inditex, 2020). Inditex owns 8 brands, including Zara, and over 7,000 stores in 96 markets, including 2,264 Zara stores Inditex (Inditex, 2020). Zara is the biggest and most profitable band of Inditex, accounting for 55.7% of its total sales (Inditex, 2020).

H&M

H&M (Germany) is also one of the world biggest retailers in the fast-fashion industry, with net sales of SEK 233 billion (H&M, 2020), approximately €21,998 million, similar to the scale of Inditex's. H&M owns around 5,000 stores in 74 markets (H&M, 2020), less than Inditex. The brand H&M, the biggest brand of the 8 brands in H&M Group, owns 4,473 stores, aiming to provide latest fashion for customers (H&M, 2020). Although H&M owns stores almost twice of Zara, Zara is more competitive against H&M evidenced by its excellent company financial performance (see figure 3).

Leading European fast fashion brands based on total revenue worldwide in 2019 (in million GBP)*
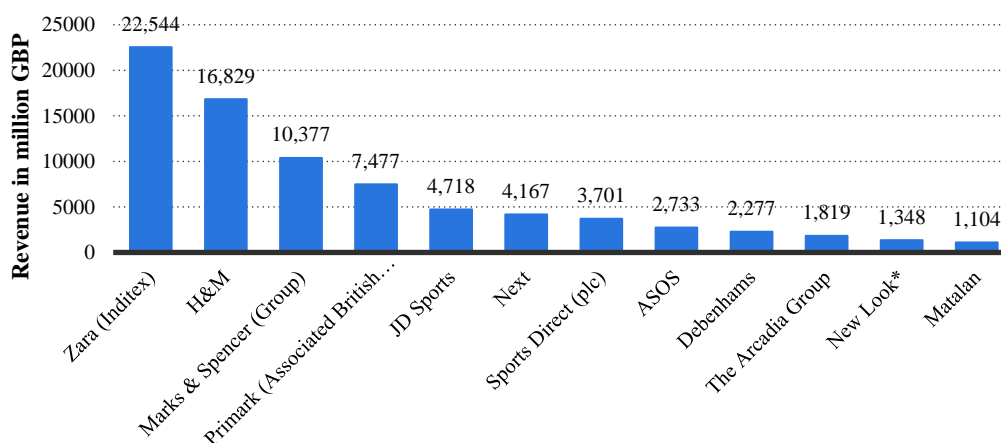
Figure 3: European fast fashion brands ranked by worldwide revenue 2019 (AskTraders, 2020).

4.1.2. CSR Situation

As a large company, Inditex has paid lots of effort in CSR from all aspects, economically, environmentally, and socially (Inditex, 2020). Environmentally, Zara is devoted to providing environmentally friendly products for customers and eliminating pollution during the production, including such as using green raw materials, preventing toxic chemicals, and prolonging the life cycle of the clothes (Inditex, 2020). Some of Inditex's sustainable goals in progress is shown in table 1. Socially, Inditex works hard for fair supply chain and employee equality and diversity (Inditex). Furthermore, it is claimed that Inditex is economically responsible as they are legally paying huge amount of tax (Inditex, 2020). While Inditex is presenting itself as highly-ethical and responsible, Zara was fined for poor working conditions in Brazil (Butler, 2015).

Table 1: Inditex's sustainable goals (Inditex, 2019).

2019	By 2020
• All headquarters and logistic platforms are eco-efficient (ten of them with LEED Gold certification). • New In-Home and Drop-Point garments collection service in Paris, London and New York. • 100% Zara stores will be eco-efficient (one year ahead of target). • Funding research on global challenges, collection and upcycling (Massachusetts Institute of Technologies – MIT).	• Zero Waste from our facilities (headquarters, logistics and stores). • 100% sustainable cellulosic fibres, supporting the roadmap towards a responsible viscose (Changing markets Foundation). • 100% single-use plastic free to customers. • 100% of all packaging materials collected for reuse or recycling in our supply chain (Green to Pack). [1]
	By 2025
• 100% eco-efficient stores in all brands. • More than 25% of Join Life garments. • Removal of plastic bags in all brands. [1] • 100% stores with containers for the collection of used garments.[2] • Zero Discharge Commitment: implementation of the best wet processes in the entire supply chain. • Canopy Commitment: 100% certified forest friendly fibres. [3] • 100% of the designers trained and specialized in circularity	• 80% of renewable energy in all our facilities (headquarters, logistics and stores). [4] • 100% sustainable cotton (organic, BCI and/or recycled cotton). [5] • 100% recycled polyester. [6] • 100% sustainable linen. [6]

Table 2: H&M's sustainable goals (H&M, 2019).

By 2020	By 2022
• 100% of facilities in own operations with water-efficient equipment. • 100% recycled, certified organic or sustainably sourced cotton. [5] • 25,000t per year of garments collected through garment collecting initiative. [2]	• 15% of water recycled out of total production water consumption. • Sign Power Purchase Agreements (PPAs). • 100% wool used are certified to the Responsible Wool Standard (RWS).
By 2025	By 2030
• -25% (2016 baseline) change in electricity intensity (kwh/sqm per opening hour compared with 2016). • 100% wood used made of FSC certified materials. • 100% reusable, recyclable, or compostable plastic packaging. [1] • Reduce plastic packaging by 25%. • 25% post recycled plastic across all packaging used. • 100% producers of viscose and other MMC fibres. [3] • 100% animal-based leather is chrome-free and originate from more responsible sources.	• 100% renewable electricity in own operations. [4] • 100% recycled or other sustainably sourced materials of total material sourced (commercial goods). [6]

H&M is also claiming itself as highly responsible for society from three aspects of CSR, environmental, social and economic (Torugsa et al., 2013). H&M's CSR practices as well as its sustainability report is more in detailed than Inditex's. Environmentally, except for some common

focuses similar to Inditex such as raw materials, product quality, H&M distinguishes by focusing on CSR transparency and communication. Socially, detail efforts on fair supply chain, employees' equity and diversity can be found in H&M's report. Some of H&M's CSR goals are shown in table 2. However, the "responsible" company is accused of "greenwashing" by Norwegian Consumer Authority (Wicker, 2020).

The CSR practices of H&M and Inditex indicates that both companies are highly aware of the importance of CSR, and are both devoting to persuade the public that they are socially responsible. By comparison, H&M pays more effort in CSR practices and has higher CSR transparency and communication intention, which is evidenced by that H&M ranks 99 in The World's Most Reputable Companies for Corporate Responsibility 2019, where Inditex is not in the top 100 (Valet, 2019). Moreover, in comparison of H&M and Zara's sustainable goals, a track of mutual simulation is found by analysing the similarities (noted as the same codes in brackets in table 1 and table 2). Furthermore, although both companies claim themselves as highly socially responsible, both of them are involved in CSR scandals, which may arouse public suspect on the authenticity of their CSR practices, and results in customers trust problems.

4.2. Data analysis

4.2.1. General Situation

The data is selected to focus on the 19-25 years old respondents (116/141 answers), which indicates the view of younger people, the z-generation. The gender ratio is imbalance, male (25.9%) and female (74.1%). Thus, gender factor is taken into account in the analysis. Majority of our respondents have basic knowledge of the fast-fashion industry, as well as the two brands Zara and H&M, and there is little gender difference (see figure 4). Therefore, the sample is feasible for deeper analysis, and the result is referable.
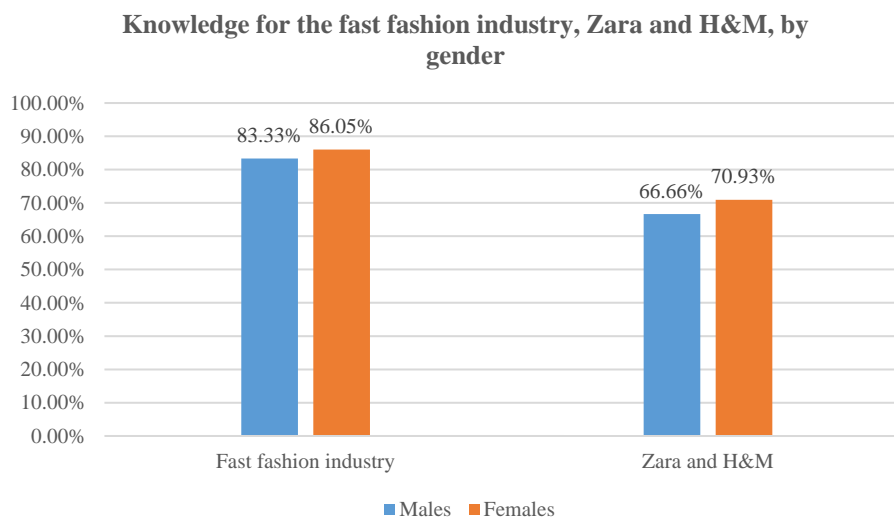

Knowledge for the fast fashion industry, Zara and H&M, by gender

Figure 4: Knowledge for the fast fashion industry, Zara and H&M, by gender.

4.2.2. Consumers' CSR Perception and Brand Equity

The result indicates that consumers' CSR awareness is moderate in the fast fashion industry, in contrast to Karaosman et al.'s (2015) statement as low customer perception of CSR. Most respondents (65.5%) have the knowledge about the concept of CSR, and a lot of people (43.97%) learn about the CSR measurements in fashion stores. Moreover, up to 60% respondents that haven't learn about the in-store CSR practices show interest to learn about it. CSR affects brand equity in the fast fashion industry (Hur et al., 2014) because of moderate customers' awareness on CSR in the industry, since the improvement of CSR practice awareness is to benefit brand image (Saleh et al., 2015), which is part of brand equity (Torres et al., 2012). Moreover, as majority respondents (75%) have learnt about CSR practices passively, more CSR communications are necessary (Karaosman et al., 2015). Gender difference is also found as, males learn more about CSR than females (see figure 5).

Knowledge for CSR, by gender
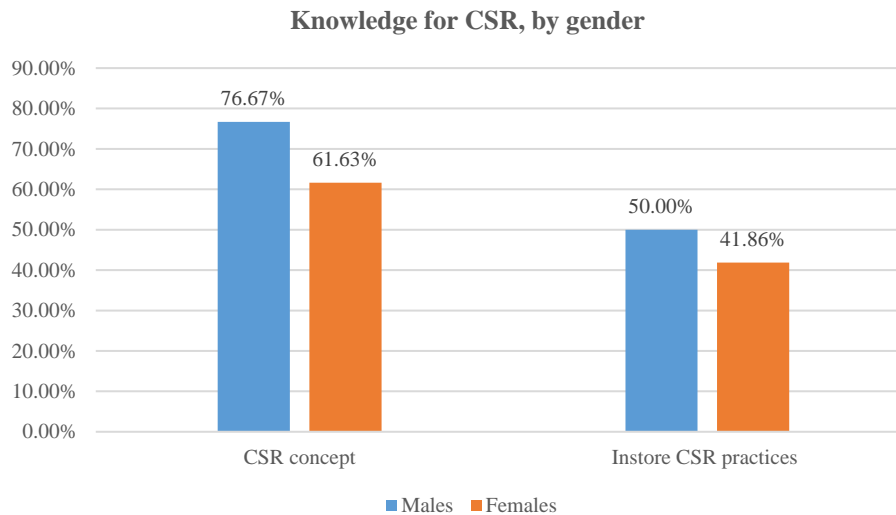
Figure 5: Knowledge for CSR, by gender.

The overconsumption caused by clothe quality and the speed of update accounting for the pursue of short lead time and clothe life cycle (Perry & Tower, 2013) are evidenced by that, 16.38% respondents purchase new clothes because of the nondurability of clothes, and majority of respondents (83.6%) purchase new clothes for trending styles, in which 16.5% would discard the non-fashion clothes. Therefore, CSR is a nonnegligible topic for brand equity (Porter & Kramer, 2006; Torres, 2012) in fast-fashion industry because of the seriousness and attention of the problem.

From consumers' point of view, product quality insurance is considered as the priority for CSR practices in fast-fashion industry, which is closely related to customers' self-interest. Other CSR practices' rankings of importance differ from genders (see table 3).

Table 3: Ranking of CSR practices' importance to H&M and Zara.

CSR Practices	Males' Rating	Females' Rating
Product quality	3.7	4.2
Environment protection	3.4	3.77
Employee rights and working environment	3.57	3.15
Fair trade	2.2	1.88
Other public welfare activities	1.37	0.95

Both environmental and social issues are attached great importance to. According to Perry and Tower (2013), social issue towards employees is the most distinguished in the fast fashion industry. However, our research suggests that, females pay more attention to environmental issues, while males care more about social issues. Therefore, different aspects of CSR practices mean different brand equity for different genders of customers, indicating the different emphasises in CSR communication towards different genders.

4.2.3. Brand Preference and Brand Competitiveness

According to the research, customers prefer Zara than H&M regardless of genders, Zara (56%) and H&M (44%), consisting with Zara's victory in total revenue (AskTraders, 2020) shown in the case study, which indicates Zara's higher competitiveness directly from brand value (Winzar et al., 2018). The brand preference is also evidenced by Zara's greater brand loyalty, which is measured by purchasing frequency, of which who buy at least 1-2 times monthly or quarterly are regarded as loyal, Zara (32.8%) against H&M (21.6%). Therefore, Zara is more competitive against H&M, as brand preference is the manifestation of brand equity, and brand competitiveness can be estimated by brand equity (Winzar et al., 2018).

Exploring Zara's competitive advantages (see figure 6), it is found that Zara wins out for its more stylish design and better quality, although H&M excels in social responsibility and cost efficiency. What customers believe as H&M is more responsible agrees with H&M's CSR reputation as well as its more effort on CSR transparency and communication shown in case study, indicating the importance of CSR transparency and communication (Karaosman et al., 2015). Furthermore, ranking competitiveness factors from customers' point of view, stylish design rank first, cost efficiency rank second, followed by quality,

and CSR is relatively the least important. Although CSR contributes to brand competitiveness, the significance is relatively small. Therefore, CSR is not the determinant of brand competitiveness (Mohr, 2001) in the fast fashion industry, and quality and style matter.
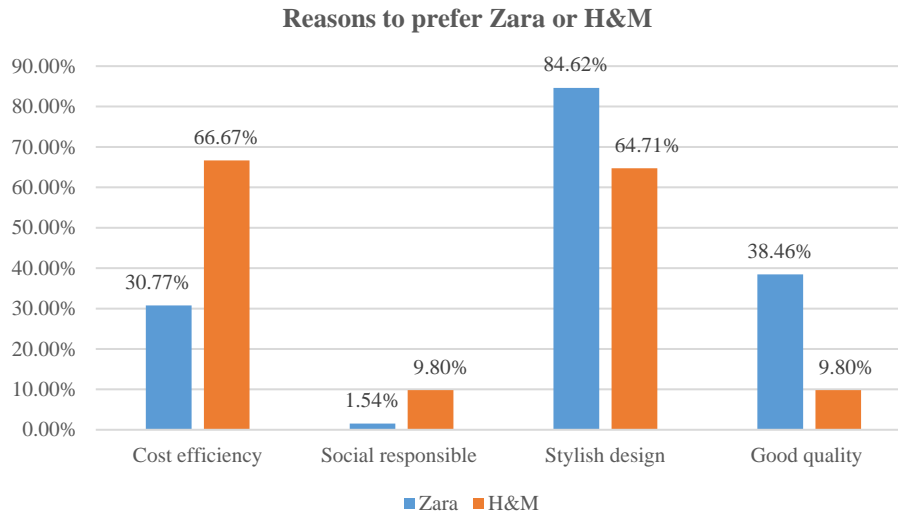

Figure 6: Reasons to prefer Zara or H&M.

4.2.4. CSR's Influence on Brand Competitiveness (estimated by brand equity)

Customers' purchasing behaviour, the result of CSR's influence on brand preference, is analysed to examine how consumers' response on CSR affects brand competitiveness, based on Winzar et al.'s CBBV value chain (2018). CSR has nonnegligible impact on consumers' purchasing behaviour, although the impact is relatively small comparing to other competitive factors (Hur et al., 2014). On general, 43.1% people consider positive CSR practices have considerable impact on their purchasing behaviour while majority (68.1%) consider poor CSR practices are to negatively impact their consuming willingness. And gender difference is highlighted that females are more likely to be affected than males by CSR (Kahreh et al., 2014), see figure 7.
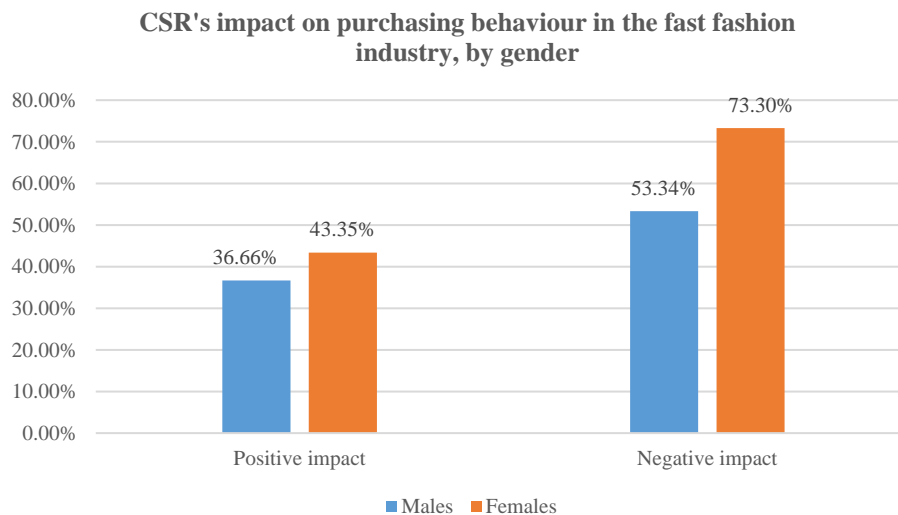

Figure 7: CSR's impact on purchasing behaviour in the fast fashion industry, by gender.

The result is opposite to the gender differences of the CSR awareness (figure 5) and self-recognition of CSR's influence on brand preference (males, 10%; females, 3.49%). Therefore, there is perceptual and behavioural difference in consumes' response on CSR. Furthermore, although positive CSR does not prompt brand preference greatly, consumers tend to boycott companies with poor CSR (Mohr et al., 2001). Therefore, because of the spillover effect on competitors (Chen et al, 2016), CSR is to promote companies' competitiveness reversely from negatively impacting competitors' competitiveness, as

competitive advantage is shown compared to competitors (Winzar et al., 2018).

On general, most people (59.83%) would like to buy socially responsible products, such as environmentally friendly products intentionally, but majority respondents (86%) refuse to pay more for them. The reasons for refusing buying environmentally friendly products intentionally are shown in figure 8.
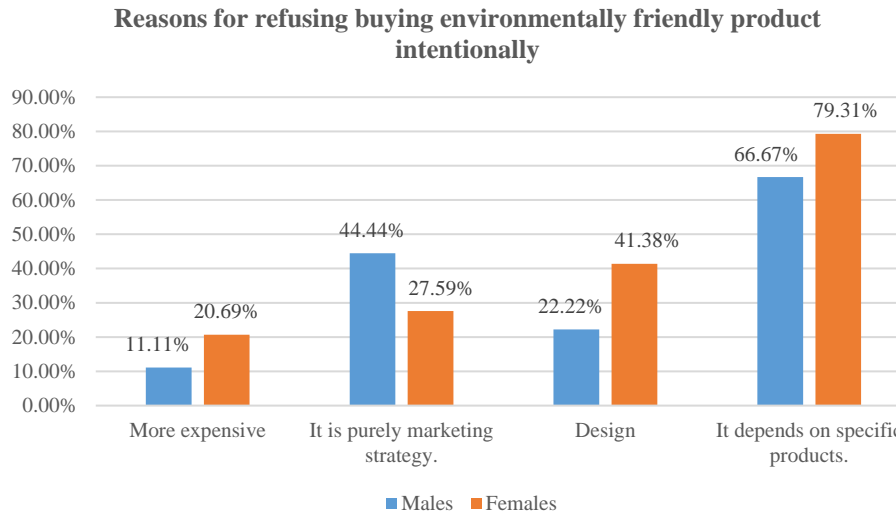

Figure 8: Reasons for refusing buying environmentally friendly product intentionally.

It remains consistent with previous conclusion that CSR is not the determinant of competitiveness compared to design and price. Furthermore, the data suggests consumers' (31.6%) doubt on CSR's initiatives (McWilliams and Siegel, 2006), evidenced by H&M's greenwashing sue (Wicker, 2020) and males (44.4%) have less confidence on brands than females (27.6%). Therefore, consumers' perceptual and behavioural difference on brand equity caused by CSR, that more males claim CSR contributes to their brand preference while they are less susceptible to CSR practices than females, can be explained by the males' weaker confidence on brands' CSR initiatives. Hence, female customers' response on CSR practices affects brand competitiveness more greatly, as they are more confident in brands and more susceptive. To prompt the influence of male customers' response on CSR on brand competitiveness, trust building is vital.

5. Conclusion

On general, consumers' response on CSR does affect brand competitiveness in the fast fashion industry, although the significance is relatively small compared to other competitive factors, ranking from design, price, quality to CSR. The result is evidenced by that ZARA is more competitive both from brand value and brand equity, although H&M excels in CSR. More proactive CSR transparency and communication is needed to expand the significance. Furthermore, consumers' CSR perception is not low in the fast fashion industry, which provides the foundation for the influence of consumers' response on CSR on brand competitiveness. Positive CSR is to benefit brand competitiveness directly and indirectly by spillover effect, while negative CSR has more serious impact. Gender difference is found. Firstly, male customers are more social CSR oriented, while female customers are relatively more environmental CSR oriented. Secondly, female customers are more likely to impact brand competitiveness by CSR, because they are more susceptible. Moreover, perceptual and behavioural brand equity difference is found and explained by the gender difference in confidence in brands' CSR initiatives.

5.1. Limitations and future research

Firstly, as the research is a case study, the range of the application of the findings may be limited to the fast fashion industry, or even the two brands ZARA and H&M. Therefore, it is suggested that more studies can be conveyed in different industries or brands. Secondly, the data is mainly collected from Chinese college students, which may be biased by culture and education level factors. Therefore, studies with more diverse sample is highly advised. Moreover, the research is conveyed from a static perspective.

Consequently, more dynamic researches regarding the time-varying influence of consumers' response on brand CSR performance and brand competitiveness can be conducted to further verify the findings.

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