

## **Zara Plus Line: The Next “Trend” For Zara**

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### **Abstract**

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*Zara is a fast fashion company that has taken the market by storm offering low-cost, quick inventory turnaround fashionable clothing. One market segment that they currently do not is the plus sizes – a market that as of 2019 was 9.8 billion dollars. This manuscript proposes an exclusive plus-size product extension line for fast fashion retail giant, Zara. The Zara PLUS line extension will be a solution to the identified issue of a lack of assortment and size inclusivity within the women’s fast fashion plus size market. Through market research and utilizing demographic and psychographic data, the appropriate target market for this extension is identified and profiled. Additionally, through the development of fashion branding & promotion schemes, the line extensions brand identity and image will be established. Retail visual merchandising strategies for both Zara’s brick and mortar stores and e-commerce website will also be determined. This includes line’s product development processes including merchandise assortment for its first debut season as well the utilization of Zara’s existing and expansive supply chain operations. Furthermore, the use of technology in the line’s merchandising is surveyed to enhance branding and promotional strategies as well as how this line will incorporate and expand upon Zara’s current omni-channel strategies. The manuscript concludes with a global marketing plan that delves into both U.S. domestic and international distribution channels for the line extension as well as its inclusion in all of Zara’s international stores.*

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### **Introduction**

Plus-size clothing is often described as clothing for larger than average people. For women, plus sizes usually start from between size 10 or 14. The average U.S. women’s dress size is between 14 and 16, meaning that plus-size is the new average, although it is not typically thought of that way. In the past, Lane Bryant was the only shop in the US for shoppers of plus-size women’s clothing, but now, many major clothing retailers such as H&M, ASOS, and Mango cater to plus-size customers. Department stores like JC Penney boast an extensive line of plus-size jeans and dresses. The plus-size women’s apparel market does not show signs of diminishing in the near future. In 2019, the market was valued at 28.9 billion U.S. dollars, and is projected to grow to 46.6 billion dollars by 2021. About an eighth of the clothing options offered online by U.S. department stores are in plus sizes. While the average U.S. consumer spends 934 dollars per year on non-plus-size clothing, buyers of plus-size clothing only spend about 637 dollars per year on clothing, on average. (O’Connell, 2020)

Zara currently does not have a plus size line and this document proposes that Zara jump into this ever growing market. Recent surveys have found that plus-size shoppers almost unanimously think more highly of a designer or retailer who produces plus-size clothing and believe in the importance of including plus-size models in runway shows.

While in the past it was unheard of to see a larger-than-average model in a fashion magazine or on a billboard, attitudes are shifting and the definition of what is considered beautiful is becoming more inclusive of larger women. (O’Connell, 2020)

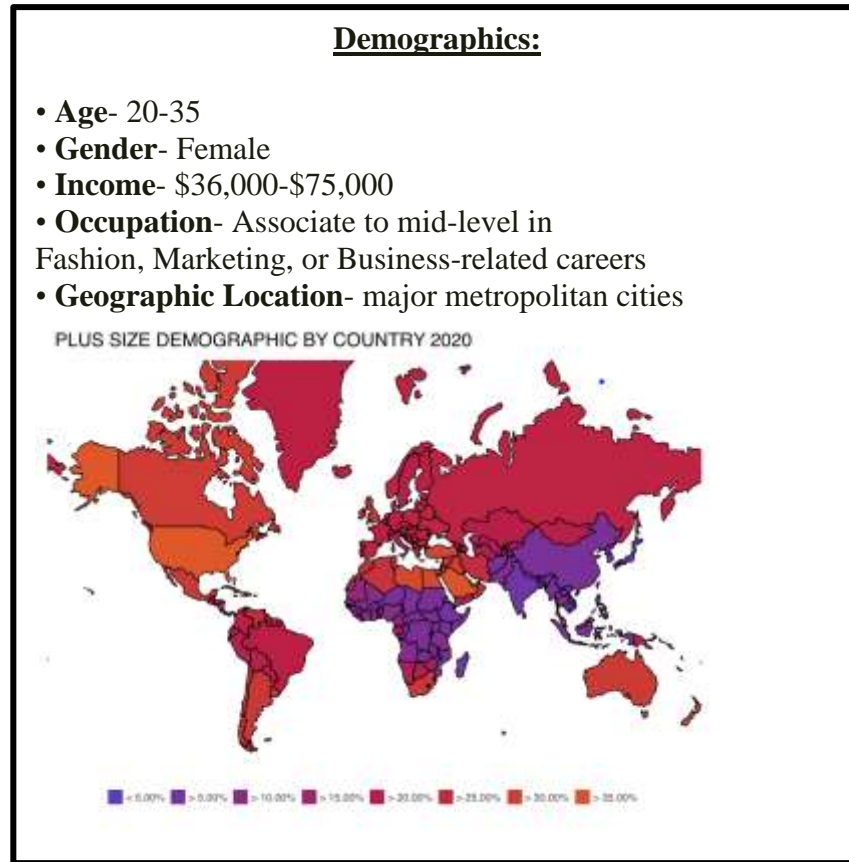
The Zara PLUS line will be aimed to target the largely underserved customer segmentation identified as the female missy plus size customer. Through market research we have found that not many fast fashion retailers offer comfortable or quality plus size offerings to this target market. Plus size consumers make up a sizable portion of the retail industry yet do not buy as much clothing because there are limited options. According to a study conducted by the NPD Group’s Consumer Tracking Service, “two-thirds of U.S. women consider themselves to be a special size defined as plus, petite, junior or tall...with one-third of female consumers identifying as plus-size” (Howland, 2019). Unfortunately, those who identify in this category have a hard time finding clothing that fits their size and style needs in mainstream retail stores. Many fast fashion stores like Zara contribute to the proliferation of the idea that retailers “only want to give those fitting the cultural standards in their clothes a positive experience while buying them” (McKeever, 2019). Additionally, they have a tendency to either completely leave out the plus size consumer or offer them products in a manner that exemplifies a “lack of quality given to the shopping experience of plus-size women” (McKeever, 2019). As a whole, “the fashion industry does not have a grasp on sizing” and retailers need to begin prioritizing “the concept of size diversity” (Couch, 2019).

We chose Zara as the retailer in which to create a plus size line extension for since they are leaders in the fast fashion market. Despite their declarations to offer quality fashion for everyone they only size their products over a certain size range which falls well below the average size of a woman, especially in the U.S market. According to the International Journal of Fashion Design, Technology, and Education, the average woman “wears between a missy’s size 16–18, which corresponds to a Women’s Plus size 20W” (Christel and Dunn, 2017), and Zara’s current offerings do include these sizes.



### Psychographics:

- **Buying habits-** this consumer is a smart shopper; she expects quality and longevity from products she buys; does extensive research before investing in purchase
- **Values-** Family, friends, hard work, honesty, inclusivity and equality, corporate social responsibility, sustainability
- **Personality-** Resourceful, optimistic, ambitious, industrious
- **Leisure activities-** Entertaining family, friends, colleagues (e.g. happy hour, dinner), traveling, networking events, social media



**Figure 1**  
**ZARA PLUS + Customer Profile**

### **Fashion Branding and Promotion**

The Zara Plus + line extension will coincide with Zara's overall brand image and identity with a special emphasis on inclusivity. Zara has always projected the brand image of being simplistic yet forward-thinking and accessible. However, we want to focus the brand image of this line more so on the accessible aspect of Zara. They are known for creating high-fashion inspired clothing and selling it to the masses at affordable prices to make it attainable for everyone. They are also well known for being "all about the customer experience...and being every place for the customer" (Danziger, 2018). However, in thinking of this, they have seemed to have left out a large demographic and market segmentation in the plus size market. Currently Zara only carries up to a size XL-XXL which is the equivalent of a US 12-14. The brand image for this plus size line will focus on inclusivity and attaining the same feeling Zara customers get from wearing their runway-inspired designs no matter what size the consumer is. The idea is for this specific consumer group who shop this line to associate Zara with being a one-stop shop for all their fashion needs. They should have the impression that this line is a part of the same sophisticated, fashion forward, and accessible brand as Zara's other product categories.

In order to visually convey the Zara Plus + line's brand image to the consumer, effective visual merchandising techniques should be utilized to ensure that the line stands out while still maintaining the core aesthetic and values of the Zara brand. In terms of visual merchandising for both the brick and mortar stores and the e-commerce website, there needs to be continuity as to not alienate existing customers in efforts to make this lines' target demographic feel represented. For the Zara brick and mortar stores, fixtures such as the lighting, signage, and layout must remain the same for the sake of consistency. Zara's store layout projects a "sleek, clean image that lets the clothes speak for themselves...opting for a minimalist, black-and-white color scheme" (Hanbury, 2018). The



**Figure 2A**  
**Visual Display Mockup – Part 1**

Zara Plus + line will be exhibited in the same fashion (see Figure 2A and Figure 2B). In the spirit of inclusivity, instead of sequestering the merchandise into one plus-size section, it will be spread throughout the entire women's department of the store. One of the many reasons plus-sized lines fail to succeed in traditional retail spaces "is because they are marketed differently from other women's apparel lines" (Hensel, 2019). Plus size clothing is usually dictated to one small section of a store and not much care or attention is paid to how it is visually displayed compared to its missy counterpart. For this, the Zara Plus + line will be included in all sections of the women's department, to feel inclusive and like any woman who shops there is one. Also, the in-store visual merchandising plan will implement the use of plus size abstract mannequins to display the clothes on. They will come in various finishes, sizes, poses. These plus size mannequins will be thoughtfully incorporated in the window and floor displays throughout the store. Technology will also be utilized to display the line with the incorporation of moving digital display screens featuring plus size women wearing the clothes from the line. Furthermore, I will hire a diverse range of sales associates who represent different sizes within the plus size market, to inspire the image of the brand as inclusive and a place for all.

As for the visual merchandising for the ecommerce website, the Zara Plus + line will be included in the women's section on Zara.com. There will be an overhaul to the overall women's landing page that will feature both missy and plus. This new landing page will include the same cool, trendy, and editorial ad pictures they feature for missy with the inclusion of plus size models wearing the new line (see Figure 3 below).





Figure 2B  
Visual Display Mockup – Part 2

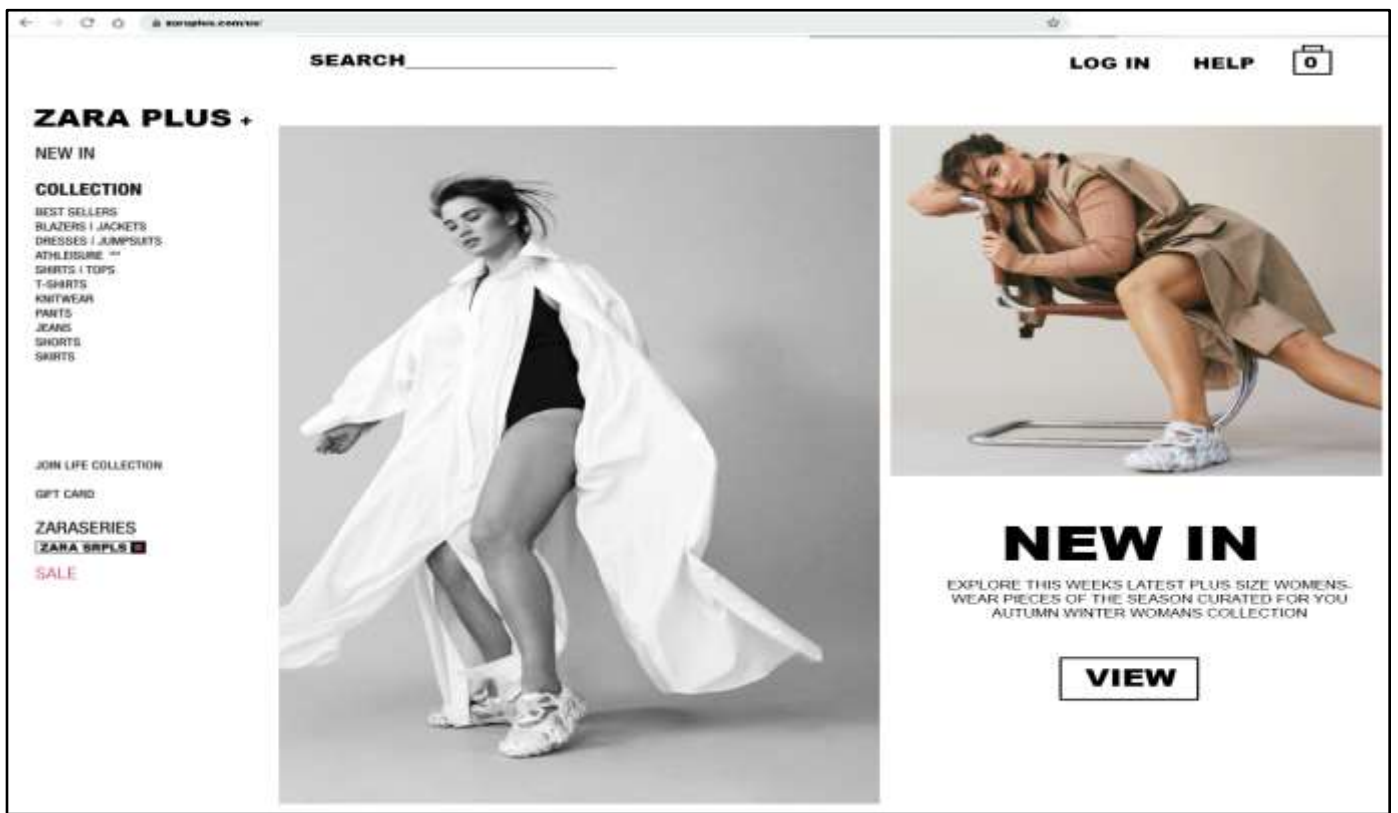


Figure 3  
Mock Zara Plus + Website Landing Page

**Product Development and Merchandise Assortment Plan**

We are proposing that the Zara Plus + line be developed from figure flattering styles designed for a full range of women’s sportswear classifications (see Figure 4 below). It will be established through extensive market research into the styles that are most figure flattering, fashion forward, and affordable for the plus size consumer. The merchandise assortment plan (see Figure 4 below) will consist of the same classifications as Zara's missy products but designed for plus size body types.

ZARA PLUS + FALL 2021 LINE PLAN						
						
WHOLESALE PRICE	\$33	\$9	\$33	\$29	\$39	\$39
RETAIL PRICE	\$35	\$30	\$59	\$89	\$49	\$49
STYLE DESCRIPTION	Mock neck, short-sleeved dress	Wool skirt	Wrap top	Wrap coat	Straight leg denim jeans	
DESIGN NUMBER	ZPC200001	ZPC200002	ZPC200003	ZPC200004	ZPC200005	
FABRIC NAME(S)	COTTON GARBAROSE	REFINED WOOL		MACRILLIENE	WENAM	
TEXTILE MALL	XVZ	XVZ	XVZ	XVZ	XVZ	
COLORS	Black, Navy, Olive	Black, Navy, Olive, Sail White	White, Black, Tan, Mustard	Tan, Black, Olive	American Wash, Dark Wash	
PRODUCTION CATEGORY (EMT, ETC.)	GMT	GMT	GMT	GMT	GMT	
						
WHOLESALE PRICE	\$30	\$9	\$9			
RETAIL PRICE	\$49	\$39	\$39			
STYLE DESCRIPTION	Adjustable paper waist bag pants	Wide leg bermuda short	Mock neck ribbed knit dress			
DESIGN NUMBER	ZPC200006	ZPC200007	ZPC200008			
FABRIC NAME(S)	COTTON	COTTON GARBAROSE	NO KNOT			
TEXTILE MALL	XVZ	XVZ	XVZ			
COLORS	Tan, Olive, Black, Navy, Mustard	Tan, Black, Olive, Navy, White, Mustard	Mustard, Black			
PRODUCTION CATEGORY (EMT, ETC.)	GMT	GMT	GMT			

**Figure 4  
Zara Plus Line Plan**

It will feature blazers/jackets, dresses/jumpsuits, tops/blouses, knitwear, pants, jeans, shorts, and skirts all designed for this specific customer with their needs in mind (see Figure 5 below).

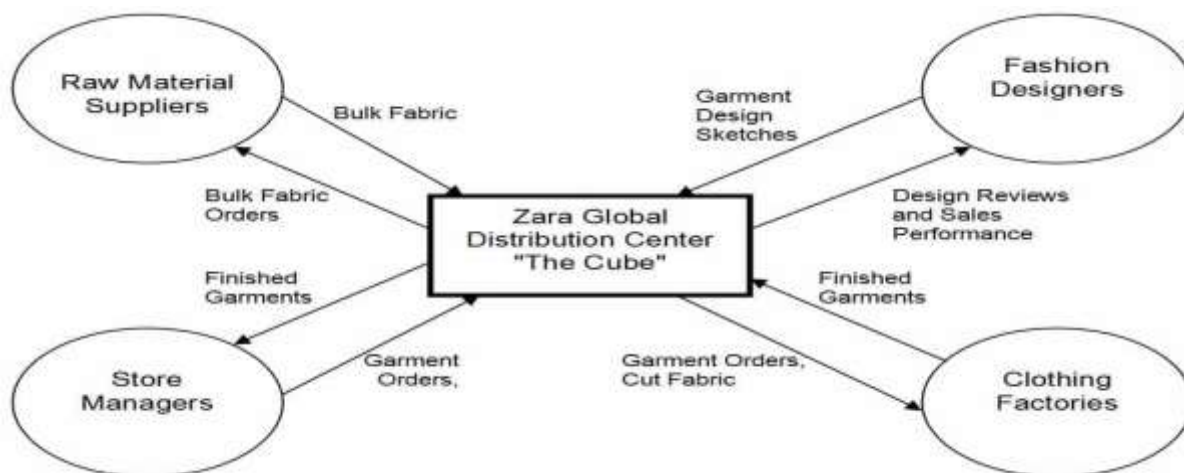
Zara Plus +						
Fall 2021 Merchandising Assortment Plan						
classification	units	% to total	Sales \$	% to total	average price	% increase units (YOY)
<b>Blazers/ Jackets</b>	3000	5.2%	\$300,000	20.6%	\$100	1400.0%
<b>Dresses</b>	9000	15.6%	\$675,000	15.46%	\$75	5043%
<b>Jumpsuits</b>	6500	11.3%	\$422,500	13.40%	\$65	4233%
<b>T-shirts</b>	2500	4.3%	\$62,500	5.15%	\$25	1567%
<b>Blouses</b>	9900	17.2%	\$396,000	8.25%	\$40	6500%
<b>Knitwear</b>	7800	13.6%	\$273,000	7.22%	\$35	6140%
<b>Pants</b>	8950	15.6%	\$358,000	8.25%	\$40	15%
<b>Shorts</b>	3500	6.1%	\$140,000	8.25%	\$40	-61%
<b>Skirts</b>	4000	7.0%	\$120,000	6.19%	\$30	14%
<b>Jeans</b>	2400	0.0417	\$84,000	7%	\$35	-40%
<b>total</b>	57550	100.0%	\$2,831,000	100%	\$485	108.5%

**Figure 5  
Zara Plus + Fall 2021 Merchandise Assortment Plan**

For example, the wrap style top will be a basic style featured in every season’s assortment. Wrap tops have been identified as a growing trend in women's fashion and it is especially popular amongst plus size customers. This basic yet stylish top "creates a flattering hourglass shape" (Petro, 2020) for curvier women. It is important for the Zara Plus + line to include styles like these. Often many retailers base their vision for their collections off of how a style looks on a straight size woman. When they want to include plus size offerings, they think just simply grading the size of the design up will suit body type of bigger sizes. There is little thought of whether or not the style will be flattering to the plus size consumers’ body type or not. This line’s assortment aims to address this issue.

**Supply Chain and Logistics**

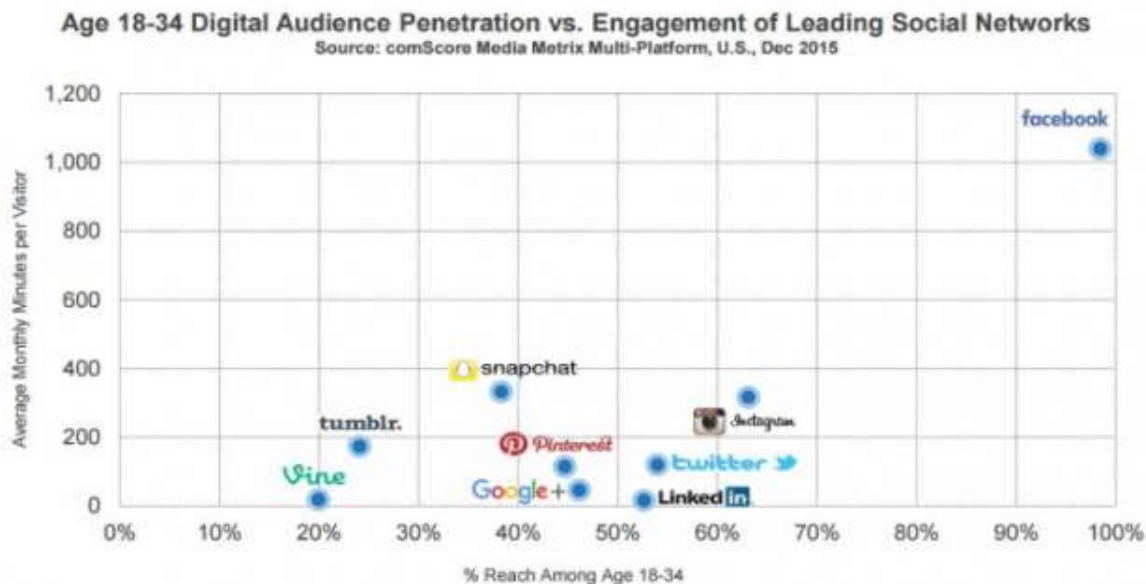
It is proposed that the Zara Plus + line extension will utilize Zara’s established, expansive, and flexible manufacturing system (see Figure 6). Zara's supply chain is by far one of the most efficient and innovative in the fashion industry. They have been named leaders in the fast fashion market because of it. They have the ability to produce designs every "two weeks on average" compared to their competitors who are only able to change every "two or three months" (Mhugos, 2020). Their supply chain system allows them to have an inventory turnover at about "12 turns per year" compared to the industry standard of 3-4. This is precisely why it is the most appropriate supply chain option for Zara Plus +. Every aspect of Zara’s supply chain from sourcing raw materials, product development, production, to distribution to the stores, is operated from their logistics hub (see Figure 7), "The Cube" (Mhugos, 2020), located in Zaragoza, Spain (see Appendix). The Cube is a "highly automated" large distribution center (5 million square feet) with "underground monorail links to 11 Zara-owned clothing factories within a 10-mile radius of the Cube" (Mhugos, 2020). In order to keep the missy and plus-size lines cohesive, the line will be developed in Zara's existing fabric suppliers located in Italy, Spain, Portugal, and Greece (Mhugos, 2020). Zara is known for buying very large quantities of their basic fabrics in order expedite deliveries to their distribution center. This will ensure that raw materials will be provided to the factories within the same time frame as their other products. In terms of product development and production, all of these processes for the line will take place within the Cube. Zara's supply chain model allows for designs to be quickly made and "out to the stores in 4-6 weeks...with existing items...modified in 2 weeks" (Mhugos, 2020) time. Furthermore, they also have various garment manufacturing factories that are connected to the monorails in the Cube that the finished goods can be delivered quickly. Lastly, in terms of the distribution of the finished goods, Zara's inbound logistics allows for them to deliver goods by air freight or by truck within "5 days of orders being placed" (Mhugos, 2020) worldwide to any market. This will allow the Zara Plus + line to reach stores in a timely manner with the rest of Zara's product assortment.



**Figure 6**  
**“Zara Global Distribution”**  
 (SCM Globe.com, 2020)

### Technology in Merchandising

Social media technology utilized in the fashion industry has opened up a multitude of new ways for retailers to expand their brand, promote their image, and connect with their customers on a more personalized level. The Zara Plus + line extension will operate this technological vehicle to aid in driving the company into the plus size target market. The line’s social media marketing strategy will consist of merging with Zara’s existing social media accounts as well as finding new opportunities and platforms to grow the company’s brand image overall. In terms of Zara’s current relationship with social media, they have a few active accounts on platforms such as Facebook, Instagram, Twitter, and YouTube. However, their social media advertising enterprises are “limited” (Billiondollarboy.com, 2019) which is what aids them in differentiating themselves from their competition. Unlike Zara’s other fast fashion contemporaries, they “embrace the luxury brand ethos of less is more, with most of their content displayed through images and videos on their website and social” (Billiondollarboy.com, 2019). Despite their limited social media presence across platforms, they do have a large following on the platforms they do utilize such as “30 million Instagram followers and 28 million Facebook fans” (Billiondollarboy.com, 2019). Zara employs the use of all of their social media accounts in the same fashion, by posting the same “high quality online content” (Billiondollarboy.com, 2019) across all their platforms. However, despite the success that they might have found to date, social media is constantly changing and updating with new trends and platforms rising frequently. According to a study conducted by Pew research (see Figure 8), a great majority of the U.S market from ages 18-34 say they are “active on YouTube, followed by Instagram and Snapchat...and when asked about the most often used app, Snapchat tops the list, followed by YouTube and Instagram” (Billiondollarboy.com, 2019). Since Zara is not currently active on Snapchat and has very limited engagement on YouTube, the Zara Plus + line extension will incorporate these platforms into its social media marketing strategy. In keeping with the brands existing image on all digital content, Zara Plus + will shoot, post, and curate the same interactive editorial content except with plus size models wearing clothes from the line.



**Figure 7**  
(Billiondollarboy.com, 2019)

We are proposing that Zara Plus + will use these social media accounts in conjunction with their brick and mortar stores, and mobile app, to provide a seamless omni-channel shopping experience for its customer. By adding improved shop now features to stories and posts on these platforms, Zara and Zara Plus will be able to connect customers to products in just one click. While Zara Plus + will be offered in-store, due to current global trends such as the hazardous effects of COVID-19 on retail, Zara’s current omni-channel strategy will be putting a heavier “emphasis on e-commerce operations” (Wassel, 2020). Zara has recently announced plans to accelerate the “full implementation of their integrated store concept...which offers customers uninterrupted service no matter where they find themselves, on any device and at any time of the day” (Wassel, 2020). This omni-channel strategy will allow Zara Plus + customers to buy products online, in-store, on the mobile app, and through social media platforms seamlessly.



## **Global Marketing Strategic Goals**

The Zara Plus + line extension's objective is to bring fashion forward and affordable clothing to plus size women in every demographic. When people generally think of the plus size demographic, they typically associate it with Western culture, mainly in the U.S. While the line also wants to efficiently serve this market, it would be a disservice to not acknowledge that there are plus size demographics in numerous international countries as well. After researching and finding the appropriate plus size demo in each country, Zara Plus + will utilize the broad ISO standardizations (International Organization For Standardization) as well as individual standards per country such as GB/T 1335.2-2008 for China, JIS L 4005 for Japan, Wacoal for Taiwan, and AS1344-1972 for Australia. This will ensure that the line will effectively serve multiple body demographics in regard to fit. While plus size is not the same standard in each region, there are underserved demographics that all have the same need for fashionable and affordable clothing in which Zara Plus + would aim to address. Fortunately, Zara is already well established as a retailer who serves a large international market. Thus, giving Zara Plus + the advantage to utilize their established resources and global connections to introduce it on a worldwide scale. Currently Zara operates over 3,000 stores in over 88 countries spanning from Spain who has the "biggest market with 547 stores... followed by China (229 stores), France (145), Russia (144) and Italy (134)...and the U.S. has 98 stores" (Forbes.com) as of last year. Zara Plus + intends to be offered internationally on every selling channel to countries with a large plus size demographic. Additionally, this line intends to contribute to Zara's expansive and growing "global e-commerce expansion...which makes up about 70% of its business" (Bain, 2019). Zara's online sales reach over 150 countries and they recently launched online sales in "Brazil, Indonesia, Serbia, Morocco, Egypt, Saudi Arabia, Lebanon, Israel, Bahrain, Oman, Kuwait, Qatar, Jordan, and the United Arab Emirates...and plan to go online in Colombia, Ukraine, South Africa, and the Philippines" (Bain, 2019). Overall, the Zara Plus + global marketing strategy is to use Zara's existing global connections and sources to establish the line successfully on a global scale as well as expand Zara's overseas reach.

## **Global Marketing Plan**

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## **Competitor Analysis**

ELOQUII is one of Zara Plus + strongest market competitors. The company used to be the popular retailer, the limited, but was taken over by Walmart between 2011-2013. Eloquii is now one of Walmart's digital consumer brands. One of their biggest strengths is that their main focus is transforming the way women sizes 14+ dress and participate in fashion. They are pioneers as an e-commerce destination for fashion in sizes 14 to 28, offering trend-driven style at accessible price points. (Business Wire.com, 2020). Another major strength of theirs is that they are backed financially by Walmart. This year, Walmart announced that it plans to "expand its fashion business to focus more on curation and quality with a focus on companies like Eloquii" (Richards, 2020). Despite these advantages, Eloquii's biggest weakness is that they do not have as far as an international reach as Zara.

Currently, Eloquii only operates in only 14 countries and "due to GDPR, ELOQUII is unable to offer products to customers in Europe" (ELOQUII.com). This gives Zara Plus + a major advantage in the international market.

**Zara Plus SWOT Analysis**

<p><u>Strengths</u></p> <ul style="list-style-type: none"> <li>• Zara Plus + will operate under Zara which is a well-established fast fashion retailer</li> <li>• Offers quality, fashion forward, inexpensive, and accessible products to consumers</li> </ul>	<p><u>Opportunities</u></p> <ul style="list-style-type: none"> <li>• Potential to dominate in the Plus size market in the same capacity as Zara's straight size segmentation</li> <li>• Could be the largest international plus size retailer in the market</li> </ul>
<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> <li>• Brand image associated with Zara whose identity was not originally size inclusive</li> <li>• Lack of existing advertising and social media presence</li> </ul>	<p><u>Threats</u></p> <ul style="list-style-type: none"> <li>• The biggest threat to Zara plus + is Strong Competition. While there are not many fast fashion retailers in the plus size industry, the ones that do exist like Eloquii, Torrid, and H&amp;M plus take up a large share in the space which could threaten Zara plus + market share.</li> </ul>

**Figure 8**  
**Zara Plus SWOT Analysis**

The Zara Plus + marketing mix will consist of promoting and selling plus size fast fashion clothing at the same inexpensive prices as Zara’s other product categories. The line will be sold across all Zara’s selling channels (brick and mortar stores, ecommerce website, mobile app, and social media shopping platforms). the plus-size women's market worldwide, is estimated to be worth "\$165.2 billion in 2017, growing at 4.4% CAGR for the period 2018-2026...which at this growth rate, the market should be worth \$180 billion by 2019" (Seetharaman, 2020). This growth indicates that there is real and active need for more plus size clothing in the fashion industry. There is a severe "lack of size standardization across the industry...with only 8% of fashion brands today offering plus-size options" (Seetharaman, 2020). With current trends in culture and media such as body positivity campaigns that promote "increasing body confidence among plus-size women...it has also increased the demand for plus-size apparel to suit the latest fashion trends" (Seetharaman, 2020). The larger sized demographic is no longer complacent with retailers' offerings, nor should they be. There is a strong demand for inclusive sized clothing to become less of a trend or niche market and "more of necessity across all product types...seeing as the plus-size demographic is estimated to have some \$46 billion to spend on apparel, every year" (Seetharaman, 2020). The Zara plus + product line extension’s marketing strategy will revolve around utilizing bit data analytics to keep track of the plus-size markets growth rate and trends to inform its operations.

**Conclusion & Observations**

Zara Plus +, the plus size line extension for Zara, will act as a solution to an identified problem found within the retail industry. Research has shed a light on the fact that the fast fashion plus size market is severely underserved as well as the young plus size women demographic in general. Through extensive market research a suitable target market has been identified, and a customer profile built. Additionally, the most effective promotion and branding strategy for the line has been formed. This includes the visual merchandising plans for Zara Plus +. As well as the most efficient product development and supply chain operations to get the product to the consumer at the right time, in the right place, and at the right price. An omni-channel strategy has also been established with the utilization of technologies such as social media. Furthermore, goals, outlines, and plans have been set in place to bring the Zara Plus + line on the global stage and into various international markets.

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### APPENDIX

#### Zara Production Plant – “The Cube”

