Importance of Digital Brand Presence in the Portuguese Footwear Companies with Different Types of Market Retails

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Abstract

This article presents and analyzes the importance of digital presence in the Portuguese footwear companies. It was noticed that Portuguese footwear brands have diverse performances when it comes to its websites user interface and communication with their customers through various digital platforms, causing the need to investigate the causes. The objective was to identify these causes and the need for adoption of brands digital marketing strategies with different business models and market retails. To address this investigation a qualitative study approach was used. Multiple case studies were conducted within footwear companies to collect detailed information. The study showed that emerging, niche market companies have a greater need, easier adoption and better performance in digital platforms than well-established companies.

Keywords: Digital marketing, social media marketing, fashion, footwear brand, communication.

Resumo

Este artigo apresenta e analisa a importância da presença digital nas empresas portuguesas de calçado. Notou-se que as marcas portuguesas de calçado têm desempenhos distintos quando se trata dos seus interfaces de utilizador do site e da comunicação com os seus clientes através das várias plataformas digitais, o que causou a necessidade de investigar as causas dessas diferenças. O objectivo foi identificar as causas e a necessidade de adaptação das estratégias de marketing digital de marcas com diferentes mercados e modelos de negócio. Para realizar a investigação foi utilizada uma abordagem de estudo qualitativo. Múltiplos estudos de caso foram conduzidos nas empresas de calçado para recolher informações detalhadas. O estudo demostrou que as marcas emergentes, de nicho de mercado, têm uma necessidade maior, uma adaptação mais fácil e um melhor desempenho em plataformas digitais do que as empresas estabelecidas com mercado de massas.

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Palavras-chave: Marketing digital, marketing das redes sociais, moda, marca de calçado, comunicação.

Introduction

The use of the Internet is constantly growing, and according to the study developed by Simon Kemp (2016) in January of 2016, about 46% of the total population were active Internet users, 31% were active users of social networks, 51% of active users of mobile devices, and 27% of active users of social media on mobile devices. Today, companies with brands invest tremendously into new digital platforms. Subsequently, it can be identified that the main focus of marketing strategies is under change for interactivity and connectivity, as well as for the continuous relationships between brand and consumers.

According to the report of Global Web Index (2016), social networks became the key channel for product search, indicating that one in every five Facebook users used the social network to search for a brand or product, that one third of users of social networks follow the brand from which they have purchase intentions, demonstrating the opportunity for brands to achieve substantial numbers of potential new customers using social networks as well as keeping relationships with the existing ones. The same report indicates that around 80% of users of social networks buy products online every month.

Stella Bruzzi (2013) states that one of the rising areas in fashion is the online presence. In the last decade, websites with content about fashion, photography galleries of couture, ready-to-wear online fashion shows and the emergence of online fashion journalism, have increased through digital platforms. Since the beginning of XXI century, three main new digital activities in fashion context were identified: fashion film with its first pioneers in haute couture, fashion bloggers who have gained much attention and online fashion magazines (Bruzzi, 2013). Overall, this area is expanding rapidly, surpassing other media previously used in communication, such as television, radio, magazines, etc. Today, there are numerous websites overflowing with fashion content, and also rising numbers of online-based fashion brands managing a great involvement and relationship with their customers. This forced established brands to reform their marketing strategies as well as to adopt new information technologies. According to Angella Kim and Eunju Ko (2010) the luxury brands were the first ones that moved to the marketing communications using digital platforms to survive the recent unforeseen challenges with increasing competition. Arguing further that the use of digital platforms such as Facebook and Twitter, already expanded to almost every luxury fashion brands and were evaluated as tools for business take-off in relation to other competitors. With this transformation, according to Tony Hines *et al* (2007), despite the continued speculation about credibility of online clothing and footwear, volume of sales sold through the Internet has grown steadily in recent years. Moreover, according to Global Web Index (2016), clothing and footwear are the most popular online purchases.
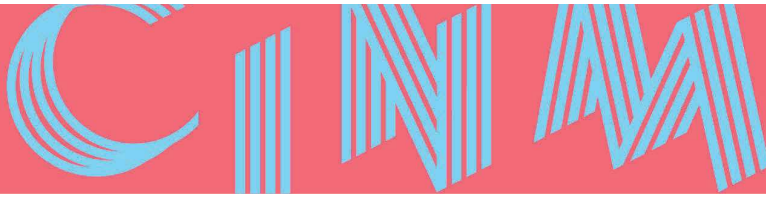
Today, being present in the digital platforms becomes a must for brands not only because there are numerous advantages to the brand itself, but also because every day a growing scale of new consumers that are more technology savvy and also are demanding added values from products and brand itself. These customers are seeking brands though search engines, and also increasingly searching for brands through social networks. With the purpose to get to know, approach and interact with the brand, collecting sufficient information and feedback on it, and the products or services they offer, and only then take the purchase decision, of becoming or not loyal customers of the brand.

However, being present in the digital platforms is not enough, and can even damage the brand if the brand does not have an implemented digital marketing strategy, because its online presence has an equal impact or even greater than being psychically present in the marketplace. This way the brand is exposed globally to consumers, where it does not have full control on its image and where consumers posses a great power of expression when in social networks.

The growth of interactive digital platforms has changed the way brand communicates with its existing and potential customers from the traditional Web 1.0 model to a highly interactive Web 2.0, where consumers are dictating the nature, increasing and changing the context of marketing exchanges (Hanna, 2011). A web template is a social system and technology that improves human cognition in relation to communication and cooperation (Fuchs, 2010), and there are currently three types of web:

1. Web 1.0, this concept is known as read-only, focusing on the representation of information (Rosen, 2008).

2. Web 2.0, this concept is named as a means of human communication, where the user is an active participant and gives more value to the content, and allows both presentation and participation (Rosen, 2008; Levy, 2009).

3. Web 3.0, an advanced concept, moving the Internet from unstructured world to the structured one, with examples of software as automatic identification, artificial intelligence, among others (Levy, 2009).

The new business model driven by social networks is defined by the connectivity and user interactivity, and the content joins the technology, producing far-reaching effects for how companies influence their existing and potential customers (Hanna, 2011). Companies began to realize that the irreversible transition of brand to social networks means a relationship transformation with the customer, where a member of the brand community is a partner of the brand and not just a listener (Phan, 2011).

Richard Hanna *et al* (2011) shows a case of involvement and use of digital platforms that helped the Grammy Awards in recent years to achieve their best classification of the level of spectators. But most importantly for the Grammy Awards is that achieved 18 to 34 years old segment, which increased 32% to 9.1 million spectators. The author states that it was created and published a marketing communications campaign entitled "We are all fans", which was spread through traditional media to reach consumers, while in social networks, it was the centrepiece of the campaign, creating intimacy and engagement with consumers that led to achieve Grammy Awards ultimate goal. Consumers prefer the media where they aren't only receiving the communication
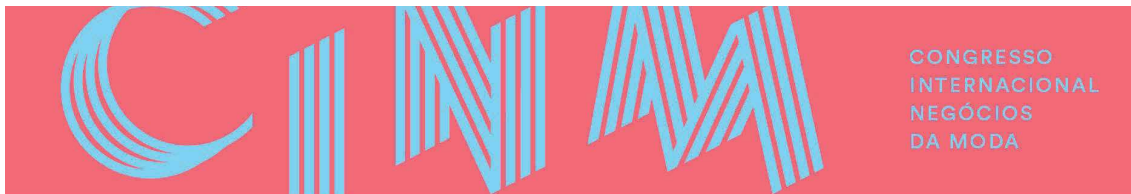
from the brands, but where the communication flows in two directions, that is, where consumer can interact and express himself.

The example given by Giullermo Armelini *et al* (2011) on the Oscars: The 2011 Academy Awards, it had less than four million viewers than the previous year, especially in the 18-49 years segment, and the share of audience fell 12%, but hundreds of thousands of Twitter users sent their opinion upon the live ceremony, interacting through social networks, sharing their thoughts, opinions, criticisms and suggestions, reinforcing the importance of these forms of interaction.

The Subaru car brand managed to sell more than 300 cars and got up to more than three thousand potential customers in two consecutive months, focusing its campaign on advertising and hosting online competitions on social networks; moreover, all this was achieved with a third of the necessary investment required for advertising in traditional media (Armelini, 2011).

One of the best examples of success in the fashion area when implementing the communication strategy online is a Burberry case study led by Michel Phan *et al* (2011), which indicated that the strategy of social networking helped the brand to rejuvenate, to create a more elegant and inspiring perception over the Burberry brand and also contributed to the increase of its total revenue by 34% in the second quarter of 2011. The author also states that the key success factor was the brand investment in digital communications, seeing young customers as the future for all fashion brands. The brand Burberry has achieved a successful communication with its audience through social networks.

In 2013, the evaluation of the best fashion retail brands in social media were brands like Dr. Martens, Selfridges, followed by Marks and Spencer, ASOS, the House of Fraser, among others (Headstream, 2013). This represents that there is a greater adoption of digital platforms by fashion brands with different types of business model and retail markets and also, demonstrates the growth of online communications between brands and its consumers worldwide.

Methodology and objectives

A major concern is a global plan of the investigation and decisions about the choice between quantitative and qualitative data collection (Saunders, 2007). For the investigation it was chosen qualitative methodology, since it is more appropriate when investigating a small sample of entities. According to Mark Saunders (2007), the classification of types of study that are more used in research methods are exploratory, descriptive and explanatory, however each of the embodiment may have more than one purpose. In the embodiment of the investigation, the aim is a description of the companies and their strategies in fieldwork, which meets the criteria of a descriptive study, since comprehensive study is an attempt to explain the observed relationships between the presented variables.

Therefore, it were conducted three case studies of the three well-know Portuguese footwear companies with the compilation of detailed information through semi-structured interviews, in order to understand if brands have digital marketing strategies

implemented, strategies for content development, and what importance it holds in company's business strategy. A case study arises from the desire to comprehend the complex social phenomena allowing the researcher to focus on a case and maintain a holistic perspective (Yin, 2009). The case study strategy may incorporate one or multiple cases, the reasons for the usage of several cases, focuses on the need to establish whether the findings of the first also occurs in the other cases and, consequently, the need to generalize from these conclusions (Saunders, 2007). The semi-structured interviews are the format, which is mostly used in investigations with qualitative methodology (DiCicco-Bloom, 2006). In general, the usage of interviews facilitates the collection of valid data that is relevant to the research objectives (Saunders, 2007).

The footwear sector was chosen for this investigation, because of the significant growth in Portugal in last decades, which strengthened its importance in the Portuguese economy. The footwear sector managed to overcome the subsequent recession of the economic and financial crisis in Europe, strengthening in design, fashion, internationalization, marketing and innovation, as well as changing its global image. In last decades, the footwear industry had an excellent performance with growth of production and employment, and also with an export growth. Overall, the Portuguese footwear positioned itself positively in the global market and demonstrates annual growth. For the growth of the footwear industry companies, continuous efforts are needed to bet on innovation, design, marketing and new technologies. The integration of the essential issues such as social and environmental responsibility, digital presence as well as continuous investigations conducted by researchers in this area are needed, in order to understand the necessary conditions and requirements for growth of national brands and also deepen the theoretical understanding about business strategies that lead to competitive advantage.

The need of this investigation arisen after the observation and identification that Portuguese footwear brands have diverse performances when it comes to its websites user interface and communication with their customers through various digital platforms. With the increasing use of digital platforms as a communication tool between fashion brands and consumers, it became necessary to develop investigations about competitive performance of fashion brands through digital presence. The main objective of this investigation was to identify the causes and need for adoption of digital marketing strategies of brands with different business models and market retails. Also, to understand if brands do have digital marketing and communication strategies implemented, how the information received from the public within digital platforms is used, exploited or if not, why. Last, but not least to understand if there is a connection between the information gathered through digital platforms and departments of design, communication and marketing within company, and how there are interlinked or not.

To address this study, case studies were conducted using semi-structured interviews within companies of well-known Portuguese brands: Fly London, Josefinas, and Lemon Jelly.

Case studies: Fly London
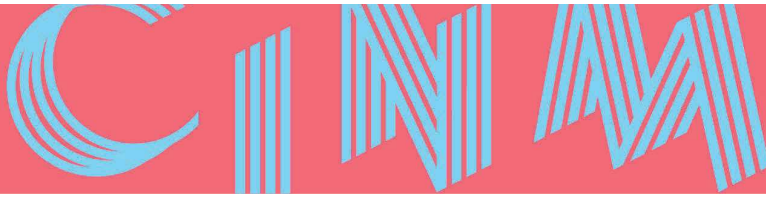
Kyaia is a leading company in footwear industry in Portugal with its brand Fly London as reference. Fly London's case study was conducted through two semi-structured interviews. One of them was with Mr. Fortunato, one of the chief executives of the company, and with Sr. Amadeu Mendes from the IT department. The collection of information has been completed with a visit to the factory allowing attainment of some more information through the course. To complete case studies it was also collected information through communication media including official brand website and its social network pages.

The first website with online store of the brand Fly London was created 20 years ago, and in time it was the first experiment, which was made on the internet by the company. According to Mr. Fortunato, they even tried a certain strategy to push online sales, applying discounts for people who sell a pair of shoes to another person. In 2012, the new online store was launched which focuses on Portugal and the internal market, managed in headquarters in Guimarães, three other online stores for foreign markets are managed by the respective market agents. The footwear collections are launched at the beginning of every season, with no new entries on the brand's online store. However, sometimes there are replacements, due to the stock in Porto or Lisbon physical stores warehouses. The products that are shown in the online store are the products that exist in two national stores.

The brand is also present in social networks, including Facebook since 2010 and Instagram since 2015, according to the respective records in social networks. Mr. Fortunato said that reasons for use of social networks are, first, because of being fashionable and popular, and another because they present some interesting aspects such as interconnection between people and groups of people. To be able to reach audience that company is focusing on, social networks became the primary means, because according to Mr. Fortunato if not through social networks, they wouldn't be able to communicate with the target audience that they are intended to cover. In conclusion, Mr. Fortunato says that social networks are a part of the brand advertisement and are used purely as an advertising tool.

The target audience in social networks, according to Mr. Fortunato is the middle class, the class that uses social networks to search for fashion products. The purpose of the use of media is to reach people matching with the target audience of the brand and that are present in social networks.

According to Mr. Fortunato there is no development of social networking marketing strategy, however, they are looking to keep up with new media. For the company social networks operate more like follow-up project or insight project. According to the chief executive, the company tries to use all advertising media, since it does not involve high cost and have some influence. Physical fashion magazines continue to be used mostly for brands advertising, although the costs are higher, but according to Mr. Fortunato, the brand ends up by gaining advantages from this advertising. The Fly London appears in some national magazines and newspapers such as Vogue Portugal, Ativa, and International magazines such as Raine Magazine, among others.
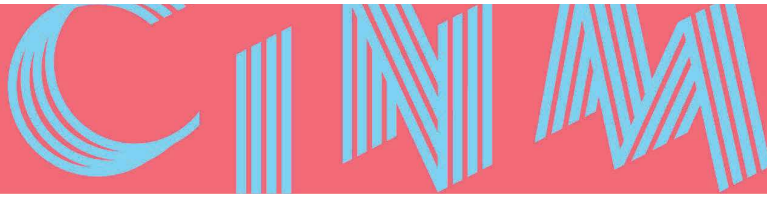
The company recognizes the importance of having online brand presence as a form of "world getting to know the brand". Chief executive officer evaluates the importance of digital brand presence as "Important" (1- Linkert scale 1 of 7: 1- Completely unimportant; 4 – Important; 7 – Absolutely important).

As for information provided by customers through digital platforms, Mr. Fortunato states that any information is important, transmitted by any communication media. According to Mr. Mendes, the information and feedback from online customers is very important, because "… it is a practical way to understand what our customer wants and what the results of the product are."

He reveals that often criticize a lot, and also since they have online chat on their website, customers often do all sorts of questions through it. The company has an employee responsible for marketing that is also responsible by answering questions in social networks through private message.

The company has different outsourcing consultants for each brand they own. The Fly London brand consultant creates the content for social networks; he is also responsible for style, images, among others, which are then approved and published in social networks by marketing department. The image and text are the content types most used in social networks, videos are few, and only used in brand's institutional website. For now, the content on the brand's website and social media doesn't incorporate keywords.

The company doesn't have a specific budget for digital marketing. Budgets for this area only exist when they do not have a very high expense. The highest budget where company is investing is the trade fairs, participating in 10 fairs only in United States of America each year, which brings more revenue to the company.

According to Mr. Amadeu Mendes, the company uses Google Analytics to monitor brand's website, in order to gather information about customers profile. As well as Business intelligence and back office store that provides information about best sellers, customers, frequency and purchase source. The reason of not monitoring the social media in which company is present, is due to the fact that social networks such as Facebook is shared between Portugal and its agents from foreign countries. There are some agreements that involve publishing permissions of the content, among others.

At this time, the company has no concern with the information obtained from analytical monitoring. The reports are used to track, but not to convert into actions based on data collected and statistics.

The brand Fly London has no connection or relationship with bloggers or opinion makers, but there was at least one sponsorship with a national celebrity such as Pedro Abrunhosa.

Case studies: Josefinas

Josefinas brand is within a company called Bloomidea, it's a luxury brand that managed to build fast a national and international recognition within last several years through well-known trendsetters, fashion bloggers and already made appearance in

international fashion magazines such as Vogue and Vanity Fair. The case study of the brand Josefinas was conducted through a semi-structured interview with the chief executive of Josefinas brand, Mrs. Maria Cunha. To complete case studies it was also collected information through communication media including official brand website and its social network pages.

The company has an online presence of the brand, which is extremely important, since the website and online store is the only sales platform, with no other type of sales channel. The reason is based on the advantage of having full control of sales channel. Mrs. Cunha said that the credibility of the brand and its products does not depend on whether there are physical stores or only online stores, but by the way it works and the way of communication.

To the brand Josefinas, every customer is precious, the company uses a whole customer strategy, where they do everything to satisfy the client, they like to surprise the customer in a positive way, and make what may be negative for the customer for example purchasing online to a positive experience, for example, receive the order in their home, making this process as very positive experience.

The brand Josefinas has a specific approach in its website and social networks, content placed through any of the digital platform has always very clean approach and its coherent. Mrs. Cunha gives an example of their strategy for the new products, which focuses the customer into the new product, when customer enters the brands website he only sees the new product on a landing page, thus giving the customer the desire to meet this new product.

In additional to the website, the brand Josefinas has a wide presence in social networks, namely Facebook, Instagram, LinkedIn, Twitter, Pinterest, Tumblr, Google+, and Snapchat, indicating the top three platforms that are Facebook, Instagram and LinkedIn. The brand is present in Facebook and Instagram since 2013. The variety of social networks used allows the coverage of markets where the brand is present. Brand's communication is done through digital platforms, which are managed by digital public relations, not using other types of communication channels. The chief executive officer (CEO) said that in her opinion, these days, social networks can be identified as an opportunity and that brands must take advantage of it. The company notes the digital brand presence as a boost to the growth of brand, and non-exploitation of the same is seen as a definition of no growth. Mrs. Cunha evaluates the importance of digital presence as "Absolutely important" (1- Linkert scale 1 of 7: 1- Completely unimportant; 4 – Important; 7 – Absolutely important).

The information provided by customers through digital platforms is very important to the company, and above all, because the brand's customers are engaged and achieved through these channels. Mrs. Cunha said that social networks are like virtual customer support, because customers who have a problem, often approach the brand across social networks, rather than using the contact like telephone or email provided on the website. It also serves to receive customer feedback, recommendations, and suggestions about products and content in a free form, which in the end is very important
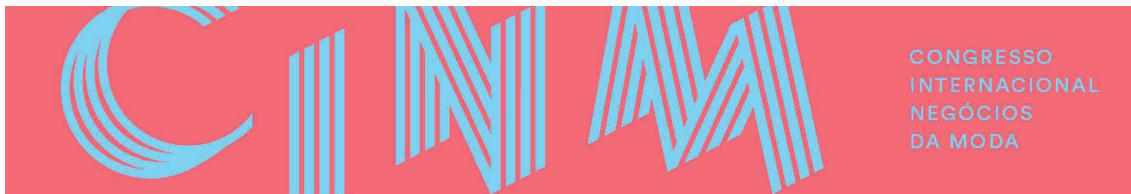
for the company. The brand also cares to respond to all customers questions on social networks.

All the digital platform content is created in a way that reflects the brand's positioning in the luxury segment; all is made with a developed strategy and planning behind. The types of content used in digital platforms are image, text, video, and gif. The company also integrates content posted by their clients on social networks, usually reposting content related with their brand. Furthermore, for the content to reach the target, the company incorporates keywords (#hashtags) to published contents. The goals of digital marketing strategy are as Mrs. Cunha said

"… as a brand, above all, is to keep an open channel with customers of the brand."

The specific budget for digital marketing in general increased this year, due to the new investors in the company. CEO revealed that at the beginning it was minimum, and still is, and states that for a company to grow in a healthy way, it must learn to do more things with less.

The company uses Google Analytics to track brand's website, as well as each social network they are present with the specific analytical review provided by the social network. The information collected through analytical reviews is analysed and assessed, and conclusions are drawn from each published content. There are also tests with multiple images, copies, among others, in order to identify the best content.

According to Mrs. Cunha, the brand Josefinas has no competitors; there is no brand specific that can be identified as a competitor and states that luxury brands have no competitors, since they are all different, unique in the target market, as well as the brand Josefinas is still too small to be able to compete with other brands. However, Mrs. Cunha reveals that some people compare the brand with others brands in the market, and when asked what kind of brands that brand is often compared, Mrs. Cunha said that people compare brand with Fendi, Repetto, and even Chanel.

The brand has a planned relationship, but not very organized with bloggers and opinion makers, always trying to take advantage of the opportunities that arise. There are some bloggers and opinion makers who buy their products, but there are some to whom the brand offers. However, there is a rigorous selection of bloggers, and there is a small quantity of products offered by the brand. Mrs. Cunha admits that it is hard to reach out the top bloggers and trendsetters, but in the end it pays off.

The brand Josefinas appears in numerous national and international blogs. The brand is recognized and recommended by the globally known bloggers and trendsetters. The Josefinas has achieved worldwide recognition of people who are involved in fashion, as well as recognition by national and international fashion and business press. Highlighted in national magazines such as Vogue Portugal, Elle Portugal, Ativa, Máxima, Exame, Marketeer and international, such as Vogue Mexico, Elle Brasil, Style, Vanity Fair, InStyle, Fashionista, and by WGSN among many more.

Finally, the brand Josefinas supports social causes, such as "Women for Women International", with the transition of women from crisis and poverty to stability and

economic self-sufficiency. Recently, the brand partnered up with global humanitarian organization CARA to help ensure more girls in Africa can access the education. CARE use the funds received from the sale of the capsule collection "Mother to Daughter" to build a new school for girls in Africa.

Case studies: Lemon Jelly

Lemon Jelly brand, specialized in moulded plastic fashion shoes, owned by Procalçado is one of the footwear sector's development brands in Portugal, which in recent years received several innovation awards. The case study of the brand Lemon Jelly was conducted through an semi-structured interview with Sr. Ricardo Oliveira from the Marketing department and also some of the questions were placed to Mr. José Pinto one of the chief executives after the conference about the brand Lemon Jelly. To complete case studies it was also collected information through communication media including official brand website and its social network pages.

The brand Lemon Jelly has the official website and online store, which was created in 2013. They are also present in social networks, which are Facebook, Pinterest, Instagram and YouTube. According to the records of social networks, the brand is present on Facebook and Instagram since 2013. In addition to the digital platform communication channels, the company also uses trade fairs, press, and exceptional cases publicity, usually then they receive an offer for advertising campaign.

The reason for the usage of social network is because company believes that these channels allow to approach target audience and to engage with existing and potential clients. Moreover, their offer many advantages, like cost vs. impact on a defined target or target audience, much higher than other channel, as well as the possibility to conduct analysis of market, allowing to obtain information about how customers sees the brand and its products, helps to create customer relationships, loyalty and promotion. The brand also believes that people trust more on brands and its products when referred by a friend or persons family member, than something like advertisement banner or ad in a magazine. For these reasons, the brand has concern to invest on digital platforms.

Mr. Ricardo Oliveira said that having an online brand presence is essential, especially for new brands, because is the only way to ensure that your brand concept, reaches the end consumer, because when brand doesn't have the physical flagship store it is very difficult to convey the concept, values, brand personality and background through retail stores that brings consumer to buy and use the products of the brand. He also stated that the online world has a great potential and may even completely support a brand virtually through online sales. It is a strong channel and with enormous potential, which can be an incentive for new brands to launch in rhythms higher than the brands that begin with the traditional process.

The information provided by customers through digital platforms is very important for the brand, because according to the company, people do not contain themselves on social networks, say what they think, and because of this, online presence helps a lot in getting the feedback quite straightforward and honest. In addition, the brand has concerns to answer all customer questions with an service-level agreement (SLA) not exceeding 24 hours, because it is considered that the social networks are the force for the

customer, and brand is exposed in them, and if they do not respond quickly to a customer with problems, they can create serious negative effects on brands image, because in addition to dissatisfied customer with the service, all that is visible to the rest of the brand's community.

The collection is launched gradually during the season. As regards with the structure and layout of the website and online store, the company is developing some changes in it, because according to brand, the website is too static for today, wanting to create website more dynamic and connected with social networks. The website and Google Adwords campaigns have different keywords every season.

There is a group of people responsible for social networks and another for website/online store, both working together to produce coherent content.

The brand participates in social networks, because according to Sr. Oliveira it is an important piece for the brand. He evaluates the importance of digital brand present as "Absolutely important" (1- Linkert scale 1 of 7: 1- Completely unimportant; 4 – Important; 7 – Absolutely important).

There is strategy and planning, as well as implementation process behind the brand content in social networks. This is because the company doesn't entirely generate the content, only around 70-80%, since the content has to be spread over several countries before being published, and has to be published simultaneously, this is the reason why they need planning. According to Sr. Oliveira the company has a little skill on content creation, so developed content has to possess minimal conditions having common content; however there is a desire to explore other social networks where the demand of the content creation is higher that the company can execute at this time. In general, most common types of content used such as text, images, video, and gif. The content is created by one authorized person, but after content is adjusted if necessary by the creative director. Content analysis exist by analysing overall feedback from followers, observing performance of published content, identifying what content works best, even so, company claims that content is too unpredictable. The company is concerned by information and suggestions provided by consumers, these are observed and analysed and noted if information is relevant.

The objectives of the social networks are to achieve customers loyalty, create brand awareness, and also having objectives for every social network in particular. For example, in case of Facebook, objectives such as number of likes, shares and comments are important. Even so, the company still feels difficulty in implementing strategies and control to reach defined objectives without having automated metrics. However, according to Sr. Oliveira, the company still aims this year to proceed with the implementation of new systems that allow metrics automation, and will help to take greater advantage of social networks.
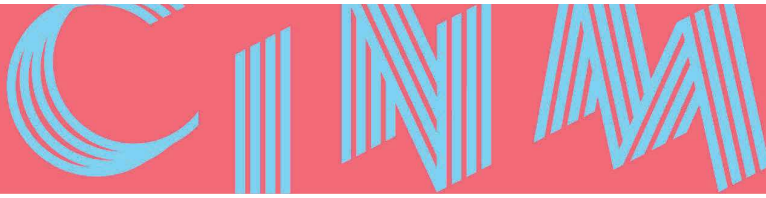
Investments are made to promote brand's social network pages within the target audience. The target audience of the brand in digital platforms is equal to the general target audience.

The brand has a planned and organized relationship with bloggers and opinion makers, Portuguese press, and in the future is planning to expand outside of Portugal. In

the brand's communication plan this area has a specific budget defined, which are normally set by types of offers, events and actions to be made and then ran throughout the year. Furthermore, sometimes are established partnerships, and there is some outlooks to even organize an event with the fashion bloggers. The company, using criteria with two variables, performs the selection of bloggers; one of them is the quantity of followers they own. The company doesn't deny any partnership with any blogger that the company thinks is suitable with brand's image personality.

The brand appears in several national and international blogs, as well as in national magazines such as Vogue Portugal, Máxima, Ativa, among others.

According to Mr. Ricardo Oliveira, the company uses Google Analytics and sales metrics to monitor brand's website, as well as analytical monitoring for Facebook and Instagram. The data collected from these monitoring tools, monthly, are used for a comparative analysis and then defining new objectives, which are registered in communication plan. However, the company doesn't have different measurements and monitoring strategies for different social networks, and when doesn't apply, it is not used. Metrics are transversal to all social networks of the brand, the shares and comments, increased interaction and quick response.

Most of the information collected through the analytical monitoring is not converted into efficient data, but the company is starting the Business Intelligence integration process for summary and crossing data which will be transformed into indications and also, converting the collected data into useful information.

Discussion and analysis of results

Through the data collected, the oldest of the three brands is Fly London (1994) and the other two brands were established in about the same time (2013). The online retail market applying classification for the fashion brands developed by Ruth Marciniak *et al* (2004), varies among investigated brands, which Fly London inserts in general fashion retail, Lemon Jelly in product specialist and niche market, and Josefinas in niche market.

Segmentation of the overall market shows that all three brands have women as a generic market segment. However, the general target audience differ in the investigated brands, the brand Fly London has mass market as its general target audience, while the Josefinas has a niche market fixing on luxury market, and the brand Lemon Jelly has its general target audience a niche market. The type of strategy that the brand chooses to adapt may influence both the website visits as well as in social networks, and probably in sales. For example, successful retail strategy adopted by Zara brand from Inditex Group, when observing in general, without getting into smaller details, the brand offers new products every week, both in physical and online stores, eventually creating in this way an incentive for the customer to visit online store every week. However, this doesn't apply to all types of fashion retail markets, strategies and targeted audience. Therefore, investigated brands have different types of fashion retail strategies adopted, which can influence the overall success of online marketing strategies.

The Fly London launches full collection online in the beginning of the season and then only few product replacements are made in case they remain in stock. While the

brand Josefinas does not develop seasonal products, instead they focus on development of concepts and mini collections that debut more or less monthly. However, the Lemon Jelly collection is launch gradually during the season.

Table 1: General data gathered and synthesized of investigated brands

	Fly London	**Josefinas**	**Lemon Jelly**
Company	Kyaia	Bloomideia	Procalçado
Brand foundation year	1994	2013	2013
Number of employees	620	6	350
The turnover in 2015 (€)	65 millions (total company's turnover)	It was not disclosed	23 millions (total company's turnover)
Online retail market	General fashion retail	Fashion retail	Product specialist, Fashion retail
Differentiation	By the like that people have for the brand	Brand concept	Quality of the materials, design and brand concept
Market segment	Women, men	Women	Women
Target	Middle class	Modern women	Women, age between 25-35, urban, with superior education and independent
General targeted audience	Mass market	Luxury market / Niche market	Niche market
Medium value of product in stores	170-180 euros	290-300 euros	100-120 euros
Leading markets	United Kingdom, United States of	Portugal, Unites States of America, and Asia	Germany, France and Asia
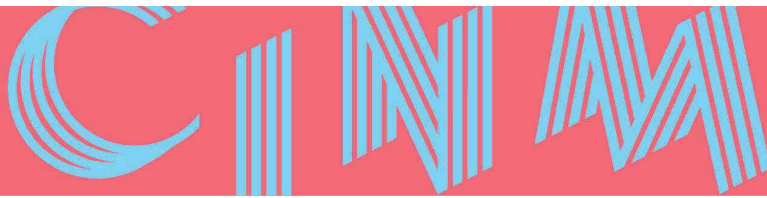
	America, Canada, and Central Europe		
Retail strategy	Whole collection launched in the beginning of season	Products/capsule collection launched during whole year	Collection launched gradually during the season
Market research	No	Yes	Yes (Macroeconomic study)

The importance of digital presence, but more the presence in social networks of the brand, also depends on the focused target that brand. In this case, the brand Fly London have targeted as middle class in general and according to the official website of the company, the brand is characterized as young fashion brand, so one of the brand's targets are young adults. The brand Josefinas describes their target as modern women, and the brand Lemon Jelly has target of urban women between 25 and 35 years old. However, even with small differences between investigated brands targets, in particular, with different social classes, the target or targets of the three investigated brands, is a target that is called millennial fashion consumer also known as generation Y. Today, and in the future, generation Y is the generation that composes the largest segment of consumers, which will have a greater purchasing power in the fashion industry (Curé, 2016). And according to Jayne Estève Curé (2016), this segment is a complex segment with increasing demands, technology savvy, modern, a buyer in multiple channels, economic, and socially conscious, trendsetters, and addicted to brands.

As for defined target audiences and actual consumers in online brand stores, neither Lemon Jelly nor Fly London collect data to make a comparative analysis between these two variables, only Josefinas uses it in order to create accurate communication with their targeted audience. However, analysis could help brands like Fly London and Lemon Jelly to identify if they are achieving the desired target audience, among other valuable information.

When observing Table 2, it can be identified a significant difference in investigated brands performances and importance towards digital presence. Mainly between the already established in physical market, in particular the brand Fly London, and the brand Josefinas and Lemon Jelly, which are new in market.

Social networks are not the traditional media, in which there exists only one-way communication, at Web 2.0 the communication is cooperative or moves in two directions, and consumers are more interested to interact with the brand and do not show much interest in brands advertisements. The brand like Lemon Jelly and Josefinas have strategies with objectives that try to involve their targeted audience in their social network pages, and not only as a means for advertising, while, the brand Fly London uses social networks, merely, for advertising purposes, as well as do not develop any strategy for social networks or any digital platforms their have. However, existing constrains, such as

placing content with all sides' approval and agreements between other countries brand agents that don't allow Fly London to develop content focused on brands interests and targeted audience by each area, and this exists because social networks are shared between brand and its agents. Still, social networking strategy and planning could lower between the all parties.

The brand Lemon Jelly and Josefinas have digital marketing and social network strategies developed, as well as a specific budget for this area, while the brand Fly London has no strategy for digital marketing or social networks, using digital platforms by intuition, and has no specific budget, budget is punctual and is approved when doesn't require high investment.

The information received through digital platforms is important for all investigated brands, agreeing that customers give an honest feedback about the digital communication, products, services, content or brand itself. According to the investigated brand, often social networks or online chats existing on websites are used by customers to clarify their doubts, concerns or simply to ask for more information, rather than contacting brand through telephone or email. The brand Lemon Jelly and Josefinas chooses to respond to all questions placed by their customers, both publicly and privately, the brand Fly London only responds to questions through private message.

The brands Fly London and Lemon Jelly have website monitoring, including Google Analytics and Business Intelligence. The brand Josefinas also uses Google Analytics to monitor the brands website. While the analytical reviewing of social networks is not made by the brand Fly London, other two brands uses analytical review tools provided by social networks. Furthermore, information collected through analytical tools, in case of the brand Fly London is not converted into efficient data and in case of Lemon Jelly is not yet, but brand is implementing Business Intelligence system, which will cross data and will transform into indicators important to the brands future expansion. The brand Josefinas analyses and converts collected data into improvements in social media strategy, however any collected data from digital platforms interfere with concepts/collection development.

In general, in all three investigated brands, the information collected through social networks remains only in the marketing department, having no connection with the design and collection development departments.

Table 2: Information about the brand's performance towards digital presence (1- Linkert scale 1 of 7: 1- Completely unimportant; 4 – Important; 7 – Absolutely important)

	Fly London	Josefinas	Lemon Jelly

| Digital platforms used	Website, Facebook, Instagram	Website, Facebook, Instagram, Twitter, Pinterest, Tumblr, Google+, Snapchat	Website, Facebook, Instagram, YouTube, Pinterest
Traditional platforms used	Fair, press	-	Fair, press, and publicity in rare occasions
Evaluation of the importance of online presence (using Linkert scale[1])	4 – Important	7 – Absolutely important	7 – Absolutely important
Online target audience studies	No	Yes	No
Focus in social networks	Advertisement	Content creation adequate to brand's target audience	Growth of the brand's community
Social network strategy implemented	No	Yes	Yes
Social network marketing objectives integrated with overall business marketing objectives	No	Yes	Yes
Digital platforms approach strategy developed	No	Yes	Yes
Specific budget for digital marketing	No	Yes	Yes
Department or group of people responsible for digital marketing	No	Yes	Yes
Analytical monitoring of website	Google Analytics, Business Intelligence	Google Analytics	Google Analytics, Business Intelligence
Analytical monitoring of social networks	-	Tools provided by social network	Tools provided by social network
Information collected through analytical monitoring is converted into efficient data	No	Yes	Almost all are not.
Content type used in digital platforms	Text, images	Text, images, copy, video, gif	Text, images, video, gif

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Replies to questions/concerns placed in brand's page in social networks	Yes, through private messages	Yes	Yes
Integration of content/information suggested by the follower in social networks	No, due to partnership with England agent	Yes	Yes
Content incorporates keywords	No	Yes	Yes
Relationship with bloggers and opinion makers	No	Yes	Yes

Conclusion

Investigations showed that new brands have a greater need to adopt digital platforms in order to be able to compete with high competition in this particular sector. Also, interviewed personnel admitted, that being present online for brand is essential in nowadays world. Also, study showed that causes for brand to be present in digital platforms can arise only because of popularity of certain digital platform and/or because other brands are present in particular digital platform. For example, the brand Fly London is present in certain social networks just because these are more popular in this particular time. In fact, it is not important to be in all social networks where other brands are, but the most important is for brand to study and identify where brand's target audience is and then also offering them what they want in order to stay competitive. Moreover, brands shouldn't see digital platforms as a new channel for brand's advertisement, because social networks by their nature are built for two-way communication, where brands can engage and establish relationship with their existing customers and the potential ones. Established brands should accompany changing marketplace and embrace new technologies in order to stay competitive.

Furthermore, it was noted that some companies are not managing digital platforms effectively. Today, increasing numbers of consumers who gets to know the brand for the first time through the online presence shows the need to analyse brand's target audience before opting to enter digital platforms, as well as, defining digital marketing strategy with integration of several tools, and most important, brand communication has to be transparent and consistent with the values and personality across all channels, producing content targeted to its customers to gain visibility, optimizing website and online store, among others.

Study also revealed that established well-known companies have an opportunity to grow more rapidly and easily in digital platforms, for example in social networks, even if they do not have a digital strategy developed and implement. The cause of this advantage is leading to the offline brand fans that can enhance the credibility of the brand. For example, the brand Fly London is in the market selling shoes in flagship stores, and through the agents, since 1994. Today, in Portugal, the brand is known for its quality
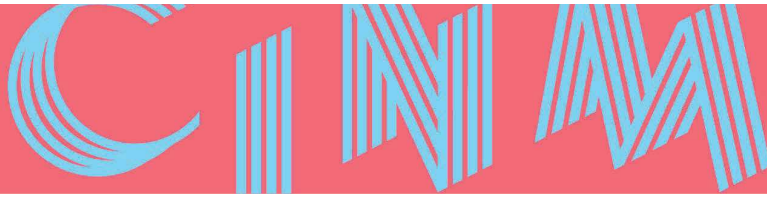
shoes, and existing fans can bring this feedback to social networks. However, the acquisition of new customers takes time, in established or new markets.

Moreover, study indicated, that knowing and analysing brand's targeted audience, is one of the key points for success to be able to approach and engage with it. Analysing the difference between the brand Josefinas and Lemon Jelly, although both are new to market, Josefinas showed superior results in consumer's engagement with the brand in social networks. Although both brands have a development of digital marketing strategy, the key difference noted between them is that Josefinas is studying targeted audience through the information gathered, and focuses on content marketing, while Lemon Jelly is still planning to do targeted audience analysis, and also not focusing on content creation that capture consumer interest.

To conclude, given the qualitative nature of this research and the fact that digital platforms, such as social networks are an emerging area that is under development, the results should be considered as exploratory. For future investigations, it is necessary to study these and other brands to a greater insight and also deepen the theories that supported the work by comparing brands with the same type of business models and retail markets, as well as different types, in order to understand how brands differ in digital platforms when it comes to competitive performance.

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