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Online platforms for Branding and rebranding: a way for Small Fashion Businesses to survive and prosper?

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Abstract

The fashion market is constantly changing, following socio-cultural movements and trends, and being affected by demographic, economic, or political factors. Brands must constantly adapt to prevailing and stand out among so many others.

The COVID-19 pandemic shook the world economy, and the fashion industry in Portugal was no exception. Traffic on social media increased and brands that were not yet established online were almost forced to be, looking to meet the needs of their customers who were confined at home. In this context, social media was for some seen as an obstacle but also as a source of added value for fashion brands. Some brands adapted went to a rebranding process, which help them to reposition into the online market.

In this research, 58 Portuguese small fashion businesses were inquired about with the purpose to identify what common difficulties they faced before and during the 2020/2021 confinement.

The results show that a large part of small fashion businesses lack knowledge around branding and have low resources, mainly financial, to acquire the essential skills to develop their business.

An opportunity can be explored in the creation of online platforms for Portuguese fashion entrepreneurs to rebrand their business, identify their difficulties and solve them self-autonomously in a professional but inexpensive way.

Keywords Small Fashion Business; Branding; Social Media Marketing; Digital Platforms

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1. Introduction

The fashion industry has always been a barometer of how society is feeling and what values because its existence is directly related to sociodemographic and lifestyle changes and indirectly to economic and political ones. COVID-19 had an impact on this industry, as other big world crises had in the past, from the first world war to the 2008 financial crisis (Amed et al., 2022).

Digital communication technologies and social media platforms have contributed to a democratization of the fashion business, with micro-business emerging in every social media network, some even driven by communities of consumers. Standing out from the immense pool of fashion offers is more difficult than before. With the pandemic, the digital fashion world has even gotten bigger, with almost every business being online, with e-commerce platforms and a presence on social media networks.

This immense competitive environment calls for businesses to have a strong plan. Along with a business plan and consolidated marketing strategy, the urge for a brand orientation approach seems the way, especially for small and medium enterprises (SMEs) that struggle the most to maintain their activities. The contemporary branding theory, suggests that a brand orientation approach (Urde et al., 2013), that is the construction and thinking of the brand be included in the strategic planning process, is key (Hirvonen & Laukkanen, 2014; Muhonen et al., 2017). Although, what the literature has found so far is that SMEs tend to perceive branding as a low priority (e.g. Krake, 2005), and stay focused on daily operations and short-term plans that allowed them to keep surviving.

This study does not intend to explore and approach all the possible explanations for a brand orientation approach followed by SMEs but ended naturally by profiling how Fashion SMEs are in terms of brand orientation. Thus, the focus is on how the fragilities often encountered by SMEs to put in practice branding activities, can be supported by the new technological developments, namely platforms of digital learning.

2. Methodology

The methodological approach in this study is qualitative. It starts with a literature review on the state of the fashion industry and how “crises” since the First World War have shaped consumer and business behaviours. Then, enter the reality of fashion SMEs during COVID-19 and the challenges faced, consumption pattern changes, business orientation, digital technologies, and online platforms. The literature review was complemented with a questionnaire self-administer to Portuguese Fashion SMEs, with the purpose to understand what the main difficulties were found during crisis times, then their knowledge and approach to branding activities.

3. Literature review

3.1. The fashion industry in periods of crisis and adaptation to change

Like many other industries, the fashion industry has survived crisis periods of history, reinterpreting the past and imagining the future (Stevenson, 2012). For example, the depression of the 1930s put a brake on consumerism, but technological developments began to accelerate (Stevenson, 2012 Baldini, 2006). Recently the crisis of 2008, started to shape some of the trends that we are experiencing right now (Gereffi & Frederick, 2010).

As one of the industries that employ the most manpower, the impact of COVID-19 spread was felt at various levels. The cancellation of fashion weeks, which end up being the showcases of major brands, and the closing of physical stores ended up forcing a reduction in the number and size of collections (Amed et al., 2020). Also, some changes that started to be noted in 2008, are now a reality, such as major volatility in consumer preferences and above all sustainability and ethical concerns. The key “actors” of fashion industry business models are now e-commerce, customization, and fast delivery (Amed et al., 2022; Castañeda-Navarrete et al., 2021).

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3.2. THE FASHION INDUSTRY AND SMALL AND MEDIUM-SIZED COMPANIES CHALLENGES

According to data from Pordata (Pordata, 2021), there is a total of 1,335,006 companies in Portugal, of which 99.9% are SMEs. In 2020 the Textiles and Clothing sector in Portugal was constituted by 6517 companies, with 123492 people at their service and with a turnover of 6882 million euros. SMEs represented more than 99% of the total of 6517, 61.18% micro-companies, 30.11% small companies, 8.1% medium companies, and 0.61% large companies. 68.51% of the companies in the sector are in clothing and the remaining 31.49% are related to textiles (BPStat, 2021).

During these last two years, the sector has suffered as almost every sector of activity, although the decrease of companies in this sector was already diminishing since 2018. Turnover was affected, but the biggest impact was on large companies. Micro-enterprises have been increasing their turnover since 2018 when they accounted for 6% and now 7%. And small companies were the ones that suffered some losses in 2019, but in 2020 had exponential growth, going from 23% to 26% of the total turnover in the sector (BPStat, 2021).

The unique characteristics of SMEs can be advantages or disadvantages. On the one hand, SMEs are very vulnerable in times of crisis compared to larger companies due to the large decline in demand (Juergensen et al., 2020). Usually, suffer from a lack of resources, if compared with large companies (Eggers, 2020). Juergensen et al. (2020) reported that SMEs characterized as "stand-alone" and more consumer-focused whereas already previous pandemics, businesses with dynamic and inconstant demand, but along the pandemic have experienced in general a decrease the demand.

Although these companies have pros that the bigger ones usually do not have, namely flexibility. Smaller structures are easy to adapt to new circumstances and prevail (Eggers, 2020; Juergensen et al., 2020). Gregurec et al. (2021) state how SMEs need new strategic approaches to face the difficulties that COVID brought. The authors proposed the use of a new business model canvas. And Salam et al. (2021) proposed to understand if a defined marketing strategy orientation, namely planning on the use of social media marketing tools was or could be helped fully to SMEs during crisis times.

3.2.1. COVID, SMES AND DIGITAL

On the digital challenges, technologies have been attracting more consumers to e-commerce. Omnichannel strategies have been already a reality for many fashion businesses, where their development facilitates on and offline shopping. For example, aspects like trying at home, and return in physical stores facilitate the adoption of fashion e-commerce (Piotrowicz & Cuthbertson, 2018). In some areas COVID has accelerated some change ad movements that were already occurring, and digital adoption is one of them (Lynch & Barnes, 2020).

Almost every business, whatever the sector or dimension, has experienced the need to use technology mainly to support activities like as sales or even control their internal efficiency or productivity. For some it was an opportunity to grow and learn more, but for some a struggle to implement and put to work in shoa rt time these technologies. Research on SMEs adopting technology, knowledge has reflected on how much easier it is in today's world with more technology accessible to everyone at a reduced cost, that even the micro-SMEs can invest some amount of their capital. And those who did not use it already to push forward their marketing activities, is usually due to management or owner doubts and lack of knowledge and confidence to use them (Alford & Page, 2015). Salam et al. (2021) went to similar conclusions within the COVID context, with the limit understanding and consequently perceived ease of use and perceived usefulness, as well as the education level of the owners of SMEs, to conditioning the use of social media marketing tools.

The reality is that in the last decade, the amount of social media marketing tools available to enterprises is immense, and can be an essential add-on to promote products, sand services and connect to customers, especially in businesses with limited resources as SMEs (Salam et al., 2021). Those who were resilient enough considering the context where the pandemic put them, ended by being benefited to driving innovation and growth (Juergensen et al., 2020).

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3.2.2. SMEs AND BRANDING

In a world saturated with all kinds of products, the number of alternatives to choose from is overwhelming to the consumer. For the businesses themselves is also a challenge. Finding a way to stand out and catch the eye of the consumer and be top of mind, is a hard task. And here comes brands, playing an important role helping consumers most of the time to make the choice (Keller & Swaminathan, 2020).

Some SMEs, even recognizing the importance of branding, perceived brand activities to be something just for larger companies (Muhonen et al., 2017). Some research (e.g. Centeno et al., 2013; Hirvonen & Laukkanen, 2014; Krake, 2005; Odoom et al., 2017) had already gone on unlocking what is happening with SMEs within branding practices.

SME reality and internal environment and structure are different from larger enterprises, and because of their specific characteristics, questions have been debated. On one side whether its characteristics influence the adoption of branding, and on another if SMEs can or should follow the same guidelines to apply a brand orientation as a large enterprise (Centeno et al., 2013; Hirvonen & Laukkanen, 2014; Krake, 2005).

Concerning SME characteristics, what can be highlighted is the nonexistence of a clear structure for decision making, the values of the leader to step up naturally, no or few communication activities are supported by branding or marketing knowledge, and lack of resources for branding (Hodge et al., 2018).

In SMEs is common that the personality and values of the brand tend to be the same as those the owner. Krake (2005) suggests that this can be a source of differentiation to be explored in SMEs with consistency and creativity. Centeno et al. (2019) recently approached more deeply these questions of the interplay between managers-owners are the brand-as-a-person and concluded that owners tend to humanize the brands, transferring to "her" personality traits or even tastes and knowledge. But what is more often detected is the lack of knowledge about the importance of branding, and understanding of its real impact, which makes most SME managers reluctant to invest in these activities (Hodge et al., 2018; Krake, 2005).

Some SMEs work in "survival mode", so the resources they have, are usually conducted to what the company or managers believe are the essential areas for the business to continue to exist (Berthon et al., 2008). Constrains associated with investing or allocating resources to branding activities, such as time, money, human capital and skills have been consequently referred to in previous studies (e.g. Ahonen, 2008; Krake, 2005).

However, different perspectives exist, sometimes more important than the effective financial resources, is what in their study Hodge et al. (2018) indicate as "deliberateness". Deliberateness was a key distinguishing factor between companies that had a defined brand orientation behaviour. Companies that consciously thought of the brand in all their activities, from the beginning, considering it the key element that united and guided all their activities, had a high degree of brand orientation. And eventually, the financial results the company expects will happen. What the literature has demonstrated is that companies with strong brands can easily charge a premium price and expand themselves with new products or service categories, with the consequent improvement of sales and financial outcomes (Keller & Swaminathan, 2020) In the SME reality, past studies corroborate that. The consensus is that business performance is affected by brand identity (Hirvonen & Laukkanen, 2014), brand positioning, and brand vision (Muhonen et al., 2017).

Relating the way SMEs should or not apply the same brand guidelines as larger companies, studies have developed and proposed other approaches. In general, the simplest ones, based on the main constraints and drowns back usually presented by SMEs. Berthon et al. (2008) want to find the differences between brand orientation practices along the 10 dimensions of Keller's Brand report card (Keller, 2000). And Centeno et al. (2013) propose a five stage "program".

The literature review made it possible to put in perspective and explore what has been happening with the fashion industry that suffered from the restrictions imposed by countries to stop the spread of the COVID-19 virus. Small businesses were affected, despite some general perception of easiness to adapt (Juergensen et al., 2020). During this period, was recorded an increase in flow on social networks, a channel where new business

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opportunities started in the last decade to be easier to develop, by the direct contact with customers and thus manage to increase brand loyalty. Although to enter this channel, past research defends that brands must have a good structure and offline branding so that they can then adapt to the market and replicate it online (Martensen et al., 2004). Without this structure, the business is only working to maintain their activities, which ended in fragility, because they do not have the essential attributes necessary for coherent communication and long-term relationship with customers.

Literature or recent industry report studies did not have so far data related to the fashion industry in Portugal and the behaviour of this business or pre-establish brands, regarding a strategic approach to branding. Also, we believe it is necessary to look for data regarding specifically the impact of the pandemic on fashion SMEs.

4. Empirical component

In the initial stage, a preliminary questionnaire was developed. Responses were collected between January 29, 2021, and February 16, 2021. The feedback was helpful to restructure some of the questions, to better pursue the objectives of the study. For the final questionnaire, the sample was also a probability sample of convenience. The companies were identified and selected from the databases of the Modtissimo fair, Modalisboa platform, and the Première Vision fair. Some brands were also identified through the researcher's network connections.

171 Portuguese fashion businesses working with clothing and/or accessories were identified and contacted by email and through their social networks. The final questionnaire was online from February 26 and May 1, 2021 and was constituted of three sections. The first one was related to the characteristics of the business (age, dimension, product category, and how and what channels they use); the second related to business structure on following or not a brand orientation strategy and on their value proposition versus the competition and the third section on their experience during COVID-19, the impact, strategies, changes implemented and future improvements to the business post-pandemic.

Only 59 answered one of them not being filled out in full. So, the discussion will be a result of 58 questionnaires.

The participating businesses started their activity between 1993 and 2021, and 70% started between 2014 and 2020 which makes them recent in the clothing and fashion accessories sector and classified only as micro and small businesses.

The channels mostly used to develop their activity are the social networks and their websites. Only 44.1% have a physical store.

On the knowledge of brand orientation, 94.9% of respondents claim to know the meaning of the term branding, but after the analysis of the open question where was asked "what do you understand by the term branding?" only 12.1% knew how to present a clear idea and 34.5% a superficial or vague idea.

More than half of the respondents developed their "brands" on their own. Only 15.30% developed their brand using a branding professional.

On the value proposition, more than 90% of brands say they can differentiate themselves from the competition and reflect on national production and product quality. 76.3% consider the competition as a reference in the way of communicating and presenting the products. 84.7% are also inspired by brands in a sector other than their own mainly by communication strategies.

On the sales volume, the year 2020 varies between brands compared to 2019. We realize that the brands surveyed, maybe because they are recent, dominate the online market, and the sales activities compared 2020 to 2019 were barely affected, and most of the growth in sales (Figure1).

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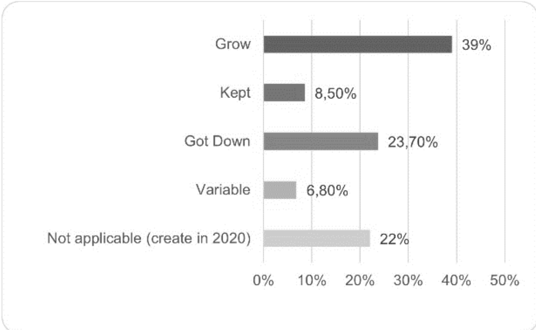

Figure 1. Sales volume 2020 compared to 2019

When asked about the measures adopted, most of them opted to do more promotions and offers and invest more in the advertisement (Figure 2). Only 23.7% of them felt their business was at risk due to the pandemic.

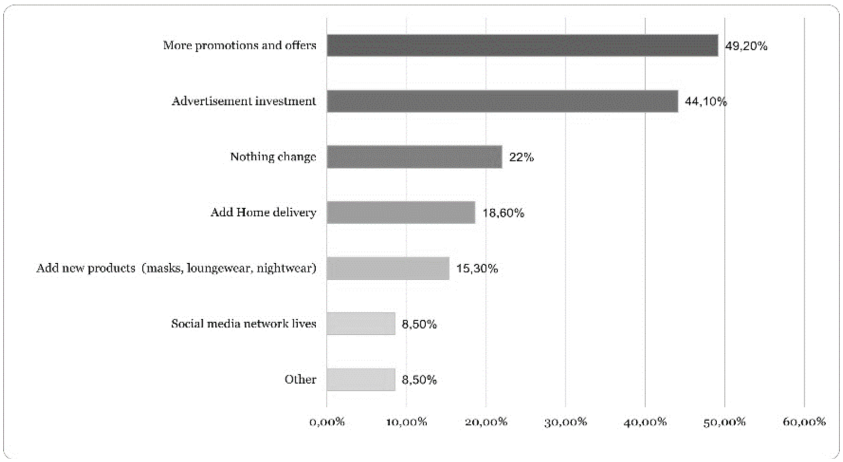

Figure 2. Measures adopted during COVID

From future perspectives, most declare their intentions to invest in marketing strategies to reach their target audience and improve their online presence in terms of social networks and websites (Figure 3). Most identify these improvements even outside the pandemic context and justify saying that there are always topics to improve and that brands must constantly adapt to the reality and the market to prevail.

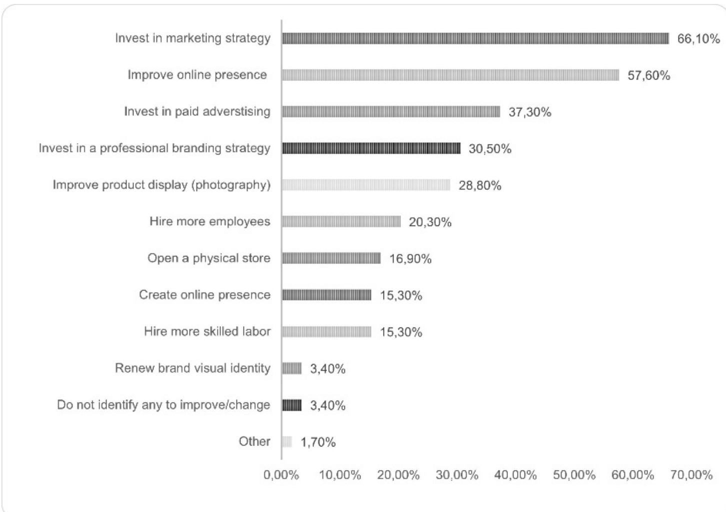

Figure 3. Future Perspectives

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5. Discussion

During the pandemic, governments across the globe went with a set of measures and incentives to help at short time companies to survive initially, simply. A recent report from OECD (2020) explicitly the policies applied across Europe, such as specific wage support schemes, working hour reduction, and postpone payments or lines of finance to protect the liquidity of SMEs. But passing this stage of simply surviving, what should be done?

Juergensen et al. (2020) reflect on the need to foster innovation. New and emerging technologies allowed the sharing of knowledge and consequently create and deliver value to be easier and push forward business performances (Di et al., 2021).

The truth is that technologies have an unprecedented key role to boost business models. Most SMEs in the fashion sector has already an online presence and some have even been born online. So, the familiarity with digital platforms is somewhat familiar, and should not be a barrier. Despite the small sample used in this study, was clear that the use of technology and familiarity with it in their main business practices, and specifically social media networks, make a difference in continuing to have sales during the pandemic. Corroborating conclusions from Gregurec et al. (2021) than SMEs have mainly taken advantage of socially related technologies, such as social media, and platforms, as communications and selling channels.

The factor "dimension" of SMEs that have been referred to previously, has pros and cons, but one on the pros are the natural drive to be more agile. If not, is something SMEs prevailing in this post covid era have in common. Agility has been key to dealing with all the challenges, from economic to psychological, since flexibility and capability to respond to market different demands or lack of them, was essential. The adoption of digital technologies helped to support business activities and, in some cases, make SMEs more competitive in their sectors, and for them, the small dimension also makes the use and adoption of new tools and ways of work, more facilitated.

Platforms are a medium where is possible to structure and manage the interactions of businesses or people in general within their action circles, to develop their activities, for example selling or engaging trough forums or communities consuming media content (Rangaswamy et al., 2020; Wichmann et al., 2022). In today's environment a vast amount of platform types exists, for example, social media platforms, video sharing Platform, service platforms, hardware-software platforms, advertising platform or knowledge exchange forums (Wichmann et al., 2022). In the fashion industry, several types of platforms exist specifically for business development, for example, "Fashion for Good" that connects textile waste from sorters to be matched with recyclers.

Gielens & Steenkamp (2019) trace routes to be explored, mainly in the field of branding in the era of digital (dis)intermediation. One of these routes to be addressed is the rise of e-commerce D2C models, where small and niche brands with loyal followers can take advantage. Also, the role of online platforms, and brand-building activities can be explored.

Some platforms already are working whit SMSs and providing branding services. For example, "Efeito Orna"[1] is an called educational Platform with access to paid courses in the areas of branding, marketing, and social networks, that have free workshops and paid courses, with a strong presence on social media, aimed at digital entrepreneurs with tips, videos, and courses for those who want to undertake digitally, launch their business, or become a digital influencer.

The results of the present study, show that most the business had already a Brand, but is only the "visual identity", what differs from a brand orientation approach. More than half of the business owners say the Brand was created by themselves and the lack of resources was the main reason. Meanwhile, in the future perspectives, expressed future priorities for business development, beings to wage on marketing strategies, online presence, and brand management activities.

[1] https://www.efeitoorna.com/

ICIEMC Proceedings

No. 3, **2022**, 258-266
Universidade de Aveiro
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6. Conclusions

Based on the bibliographic research and the results of the questionnaire, is possible to deduce the need to create means that meet the needs of small fashion businesses in Portugal currently. That is brands that do not know what they are as brands and how to work with them. Without a branding structure and strategy, that means a brand orientation, the businesses, although alive and running through pandemic adversities, stay in the long run more vulnerable to market fluctuations and demands. Given this conclusion, considering that these businesses have what the owners call a "brand", which is only a visual identity, the development of a branding strategy, or in some cases a rebranding is the most necessary approach.

Is possible to realize that SMEs tend to undertake self-taught activities and that most of the time do not have at their disposal all the tools and information necessary, as well as the economic means to acquire them. Most owners show interest since they already dominate the online world. Is proposed that online platforms where SMEs have access to branding information to develop autonomously branding or rebranding their businesses, can be one way to keep their walk in the fashion industry.

Is important to acknowledge that this study has several limitations First the size of the sample and its composition, since the majority were micro-companies. Also, the questionnaires cover only the use of social media for e-commerce, and do not explore more about how brand communications activities are taking place. Further studies can contribute to exploring on a deep level what is the role of technological knowledge, digital presence, and use of social media to enhance SMEs to follow a brand orientation approach.

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