

Analysis of Fast Fashion Brand Marketing Strategy in China Based on The STEPPS: Taking Brandy Melville as an example

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Abstract. Despite an overall downtrend in the expansion of the fast fashion industry, Brandy Melville (BM), an Italian clothing brand that attracted most of its popularity in California, opened its first offline location in 2019 in Shanghai, China. With its revolutionary and novel marketing strategies like social media-only or one-size-fits-all, the brand and its clothing style immediately went viral, sweeping social media channels, winning the favor of young women, and bringing pronounced attention across the country. How did BM succeed in China? This study is an exploratory research that aims to use three key components of the STEPPS framework to explain this question. It points out the positive and negative effects of BM's strategies and potential problems that BM could face, providing a chance for BM and similar brands to use STEPPS to reflect and better their existing marketing strategies. Using Social Currency, BM found its inner remarkability and created exclusivity through its one-size-fits-all product, generated scarcity through a limitation of offline stores and the number of clothes supplied, and applied game mechanics through discriminatory hiring practices. These practices were also implemented by applying strategies of highly arousal emotions like excitement, anger, and anxiety to boost the brand's word of mouth. By narrowing the target market, BM established and emphasized a unique style for their clothes, making their brand publicly visible. Though the current policies are the reasons for BM's success, in a world with a growing emphasis on diversity, these strategies might eventually backfire, risking the brand's reputation.

Keywords: Viral Marketing; Brandy Melville; Fast Fashion; Appearance Anxiety; STEPPS.

1. Introduction

Starting from the early 2000s, with the rapid development of the economy in China, people were willing to spend more and more on clothing, especially the younger generations living in first-tier cities [1]. Spotting the opportunity, fast fashion brands such as Uniqlo, H&M, and Zara all wanted to have a say and rushed to enter China, causing them to occupy an immense number of China's apparel market. With the advantage of the flexibility in variety, amount, and frequency of the new styles, fast fashion brands have quickly emerged into the market and are aggressively achieving their goal of expansion. By 2016, Zara had reached over 500 locations in China, and H&M had over 370. Unfortunately, as a result of reasons like the growth of domestic brands, development of e-commerce, financial pressure, and Covid-19, the expansion of the fast fashion industry started to decrease, and the market was in a slump [2].

However, in April of 2019, Brandy Melville (BM), a European clothing brand, suddenly exploded in China after opening its first offline store in Shanghai. It attracted a huge number of young teenage girls while sweeping social media channels and bringing pronounced attention across the country. More surprisingly, BM decided to open its second offline store in Beijing during the peak of the pandemic, while many other businesses faced severe financial pressures and began to shut down. The explosion of BM in China stirred curiosity to understand the reasons behind its popularity. This study tries to analyze BM's success in the Chinese market by using the STEPPS framework. The study starts with an overview of the brand and market condition in China, then moves on to the definition of STEPPS, and finally analyzes how BM applied the three key components, Social Currency, Emotion, and Public, of STEPPS as their marketing strategy to gain popularity.

Marketing models are essential to a business's success as it helps companies to structure their business ideas and effectively convey their selling strategies and messages. Currently, lots of marketing research is conducted based on models like SWOT analysis, AISAS principles, or 7Ps

of the marketing mix. Nevertheless, focusing on these traditional principles is far from enough. Nowadays, generating word of mouth is the key for a business to catch on. Therefore, in order for a business to be more competitive, understanding and employing contagious marketing like STEPPS is very necessary. This study will offer a better overview of the application of STEPPS, specifically in the fast fashion industry in China, providing a chance for BM and similar brands to reflect and better their existing marketing strategies.

2. Brandy Melville

2.1 The Origin

Founded by Silvio Marsan in the early 80s, Brandy Melville is an Italian fashion clothing brand that markets their products toward young women. Though it is a European brand, it earned most of its popularity in California after opening its first U.S location in the Westwood neighborhood of Los Angeles [3]. Since the first store opened, BM continued to grow. Early in 2014, Financial Time's analysts estimated that the brand's annual sales had reached 125 million US dollars, and the annual sales growth had reached 20% to 25%. Currently, there are almost 100 locations around the world [4].

While having a unique style, the neutral color palette of BM's clothing provides shoppers with a chance to create their own look through layering pieces and mix-and-match [3]. The brand implements one-size-fits-all clothing, when the one size is S, making their business more economically and environmentally efficient [5]. This one-sized policy has also stimulated extensive and vigorous public discussions on topics such as fat-shaming, discrimination, and young girls' self-esteem. Additionally, BM's brand image is built exclusively through its effective use of social media platforms, significantly contributing to its overall success. Instead of making a big media splash and investing big money in advertising, BM relies upon the online images of a group of strategically selected "young, white, skinny, and long-legged" girls that the company calls "Brandy Girls" [3]. On Instagram, the brand's primary medium, @brandymelvilleusa, currently has more than 3.3 million followers (August 2022).

2.2 China

Due to its existing reputation worldwide, many people have already heard of the brand before it hits the Chinese market, putting it at a very high starting point. As the first offline location in China, BBM wisely selected its location on one of the most bustling and international streets in Shanghai, Anfu Road, where the average demand for stylish, trendy clothes is high [4]. The news of BM's first offline store soon drew widespread attention from the community upon its opening. Two years later, because of the first store's popularity, BM decided to launch its second offline location during a pandemic in Beijing, Sanlitun, known for its fashionable dining and nightlife scene, again gaining great success.

The brand continued to follow its social media-only strategy to construct its image. Adapting to the Chinese Market, BM picked Xiaohongshu, an alternative to Instagram, as the primary channel to boost their overall marketing. Of all the Chinese mainstream social media platforms, Xiaohongshu's users best match BM's target market. As of 2019, Xiaohongshu is one of the fastest growing social media platforms, gaining over 300 million registered users: 70% of its users were reportedly born after 1990, and nearly 90% are females. In other words, most Xiaohongshu users are potential BM customers. Using this approach, the brand made their marketing more effective, conveying their messages directly to their wanted crowd.

Lastly, as a result of western influence in China and California's international reputation as the "golden state", many people possess the "California Dream," hoping that one day they could start a new life in Cali where their hard work would be rewarded. In 2018, 38% of Chinese travelers in the U.S visited California, and the majority of Chinese immigrants in the U.S today live in California [6,

7]. Thus, Chinese teenage girls are inherently motivated to follow and involve themselves in a brand known for its “Californian girl” profile.

3. STEPPS and Brandy Melville

3.1 STEPPS

There are many instances where products, ideas, and behaviors catch on and spread across a population like a virus. While quality, price, and advertising do contribute to things becoming popular, there are still many examples that these aspects can’t explain. Those unexplainable instances result from overlooking the impact of social influence and word of mouth. Remarkably, around 20 to 50 percent of our purchasing decisions are based mainly on word of mouth. Thus, social influence is the key for things to catch on [8].

After analyzing hundreds of contagious messages, products, and ideas, Jonah Berger, a marketing professor at the Wharton School at the University of Pennsylvania, developed the STEPPS framework: a set of specific and actionable techniques for helping information spread. The STEPPS includes six principles—Social Currency, Triggers, Emotion, Public, Practical Value, and Stores—that explain the science of how word of mouth works. This study will focus on how BM leverages three of the principles, Social Currency, Emotion, and Public, to make them a success in China.

3.2 Social Currency

Disclosing information about the self is human nature and is intrinsically pleasurable. Social Currency is often the driving force behind sharing: “people share things that make them look good to others.” Since we make inferences about a person based on their choices and what they choose to share, people prefer sharing things that “make them seem entertaining rather than boring, clever rather than dumb, and hip rather than dull.” Consequently, to get people to share, a company needs to find a way for people to increase their social currency by talking about their product or idea. To do that, the company needs to find their inner remarkability by creating things that’s “unusual, extraordinary, or worthy of notice;” leverage their game mechanics by implementing the elements of a game that keep people engaged; and make people feel like insiders by using scarcity and exclusivity to make things seem more desirable [8].

3.2.1 Application

BM finds their inner remarkability through its one-size-fits-all product lines. The idea of “one size” itself is interesting and somewhat surprising as it breaks a pattern of what people have come to expect. It also helps BM to stand out from almost all the other brands that have a variety of sizes to choose from, making the brand worthy of mentioning during conversations since the unusualness of the policy makes the people who talk about it look good.

Besides, the one size policy is highly exclusive and unattainable by nature. To be more specific, the vast majority of the skirts available list 12’’ to 14’’ (capable of stretching to approximately 25’’) as the waist measurement. Comparing that to Urban Outfitters’ sizing chart, the skirts would be a size 0, which is the smallest size [9]. Their one size pants have a waist that is 5 inches smaller than that of the average Chinese female [10]. Hence, BM’s slogan “one-size-fits most” isn’t reflected in their clothes. In fact, their one size does not fit many, making the product inaccessible to a majority of teenage girls. What’s more striking is that pictures on their social media accounts didn’t feature high-end models or celebrities but rather solely pictures of store employees and online influencers with extremely slim figures that look like they were taken in natural lighting with a smartphone [3]. The hidden message of those pictures is rather ironic: anyone can become “Brandy Girls” or join the BM club. Just like that, BM made the sizing aspirational and promoted and perpetuated the trend of the ideal body type by connecting thinness to beauty and success.

While this tactic is used by BM all around the world, it is exceedingly more effective in China as it rides the wave of the contemporary Chinese feminine beauty standard and female body dissatisfaction:

Today, while most countries have been advancing public perceptions toward accepting plus-size women and promoting body inclusivity and gender equality, China has failed to do so. The cultural expectations of thinness in Chinese Women are more severe than ever. An increasing number of young girls have attached great importance to their body-image which resulted in increased weight loss behavior. More than seven out of ten college-age women had taken action to lose weight in the past six months. Meanwhile, over 30% of the students sampled were underweight [11]. This distorted perception of beauty created “a paradox whereby an underweight woman with an eating disorder is often considered healthier than a natural plus-size woman who regularly exercises” [12].

So, the one-size-fits-all policy is a significant reason for BM’s success. Young girls would be prompted to lose weight or do whatever it takes to join the BM club. Those who could fit in BM feel unique and high status, being able to attain something the majority cannot. This feeling would heighten the brand’s word of mouth since telling others makes those girls look good. They also proudly post pictures of themselves wearing BM clothes on Xiaohongshu to prove that they have the “ideal body type,” boosting their social currency while feeding the brand’s popularity online.

In addition to using exclusivity, the brand also applied the concept of scarcity. Most popular fast fashion brands have wild ambitions to expand their businesses through adding new locations, resulting in high brand awareness among Chinese people. For example, currently, H&M has around 380 locations in China, while Uniqlo has, shockingly, more than 890 stores [13]. Nevertheless, BM did not choose to follow the traditional approach to increase its popularity. BM launched only two offline stores in China, one in Shanghai and another in Beijing, and they do not seem to have plans for any vast expansion. Then, how did BM raise their brand awareness with so few locations? They built an immersive in-store experience: every time one visits BM, one will walk into an elaborately decorated space with sticker walls, exquisite changing rooms, pop music, brand fragrances, and model-like, good-looking store clerks [4]. By doing this, BM made their offline locations more than just a typical chain clothing store that's seen everywhere. It had been hitting the "Things to do in Shanghai/Beijing" lists and became an internet-famous and must-visit site for young girls to take their perfect Xiaohongshu or Wechat moments snap. Even if someone is randomly passing by Anfu road, they are more likely to walk into a store that they do not have the opportunity to shop in anywhere else. BM controlled the scarcity of its products as well: many clothes at the stores are often unavailable or sold out, making people more obsessed with and desperate to get them. Customers and fans even commented under BM’s posts asking for replenishment of Cara skirts and hoodies, claiming that they have been waiting for months [14]. These comments brought data traffic for BM online and made people infer that many others must like it, so the brand is worth checking out.

Finally, BM is also known for their discriminatory hiring practices led by CEO Stephan Marson, who opened the first BM stores in Italy and then expanded to the U.S. He only wanted to hire “good-looking rich little girls” who were “nice and delicate,” and the hiring standard is solely being “skinny, white, blond, and pretty.” According to an allegation reported by Insider, Marson commented that one of the stores was “only hiring pieces of shit,” so the employees needed to be fired [15]. Although facing lots of criticism in the U.S, China adopted similar practices in hiring employees. The two stores only hire people who meet a specific profile standard: pale-skinned, young, skinny, good-looking, and must reach a certain number of followers on social media. A blogger on Xiaohongshu observed that “if you walk into BM in Beijing and Shanghai, you will meet the best-looking people in the city. Some patrons visit the store just to take a photo with the attractive employees there” [16]. Girls often get hired by being asked in the store if they are interested in working at BM, and those who got invited bragged about their experiences on Xiaohongshu since it implies that they meet the ideal beauty standards, which makes them look good to others [17]. Employees also proudly post pictures of them working at BM or wearing BM clothes. However, those girls don’t know that every time they proudly share their status, they also spread the word about BM, providing the brand free promotion. Tactfully,

BM applied game mechanics to their hiring practices, motivating young girls by encouraging social comparison. Since being an employee is deemed superior or something to be proud of, many people become so focused on getting the job that they lose their common sense.

3.3 Emotion

After analyzing the Most E-mailed lists of New York Times articles, Dr. Berger and his team found that highly arousal emotions, or emotions that bring a state of activation, can also drive people to share. For instance, articles that provoke awe, or the sense of wonder and amazement that occurs when people are inspired by great knowledge or beauty, are 30 percent more likely to make the Most E-Mailed list. Sharing emotions helps people connect as it highlights their similarities and reminds them how much we have in common. In addition to awe, other emotions like excitement, amusement, anger, or anxiety could also have the same effect [8]. So, it is important for companies to find the right levels of emotion in order to boost word of mouth and effectively convey messages.

3.3.1 Application

As mentioned earlier in the application of Social Currency, BM's clothes will provoke feelings like delightment, excitement, and gratification among shoppers or employees who can fit perfectly into BM because they feel special being able to achieve something the majority cannot, intrinsically encouraging them to share about BM. While some have criticized BM's exclusivity of sizes harms the self-esteem of girls who do not fit into the ideal size, making them even more insecure about themselves, there is also a different way to look at the one-size policy [18]. It boosts the self-esteem of those who could fit into BM, especially social media influencers and employees. Seeing their social media accounts blow up and fans coming to the store to meet and greet them will do nothing but continue satisfying them with the pleasure of being high status and unique. Consequently, they become even more devoted to the brand since they want to keep benefiting from the popularity and fame they gained, which aids the brand in winning over high customer loyalty.

Furthermore, it is obvious that the policies of BM would also arouse many negative sentiments like anger and anxiety, contributing to the brand's visibility and word of mouth. Contentious debates have been present since BM first introduced and launched the offline store in China. Numerous media outlets published critical comments and accusations about a series of unethical means and practices of the brand, like rating applicants on their looks or sexual harassment in the workplace, stirring up more people against the brand. They also challenged the notion of one-size-fits-all and condemned the brand for subjecting young girls to body shaming. As a result, the public's wrath and concerns have been greatly heightened. People who were previously unaware of BM started to learn about the brand. A blogger on Xiaohongshu under the alias "mean cousin" posted a video accusing BM's discriminatory hiring policies. The video immediately went viral, instantly receiving over 25,000 likes and 1,000 comments, most of which agreed, highlighting young girls' shared emotions of anger and anxiety [19]. As highly arousal emotions, anger and anxiety evoked by these sorts of posts will instinctively drive more people to share and repost.

Some people may question whether such extreme emotions really positively affected BM since anyone would imagine the brand to have a poor reputation after those accusations and debates. It is impossible not to create a negative impression with anger and anxiety. However, many fail to realize that one's thoughts or opinions online do not always match their behaviors. For example, on Xiaohongshu, netizens made comments like, "Although I like the brand, the company vibe is really disgusting" or "If you can't fit in the clothes, you don't have to shop at BM. No one is forcing you". These comments reflect many people's responses to BM. Overall, most customers are well informed about the toxic culture and approaches that the brand has taken and somewhat disapprove of the practices. Yet, they still shop at Brandy. Some may shop simply because of the practical value. Some may shop because BM's clothes look good on them, and they feel that an individual's choices and power are incapable of changing anything about the policies. In short, most people don't really have the energy to care or make changes about problematic issues that don't directly affect them [20]. Even for some plus-size girls, after being emotionally blackmailed and brainwashed by the brand and the

ideal beauty standard, they started to believe that what BM is promoting is proper and healthy, and they should strive to become the standard.

As a result, anger and anxiety surely are more helpful to the brand in China than damaging since negative emotions are strategically employed to raise the level of discussion, and BM successfully utilized the technique to make the brand more recognizable to the general public, boosting its brand awareness and popularity.

3.4 Public

Herd Mentality is the idea that people often like to imitate what others are doing because others' choices provide information that resolves our uncertainty. Hence, making things more observable and publicly visible is another key factor in driving products to catch on as it makes things much easier to imitate. To make things more observable, a company can generate public signals for private choices and opinions, design ideas or products that advertise themselves, or create behavioral residue that constantly reminds people of the product [8].

3.4.1 Application

Unlike fast fashion brands like Uniqlo, which target both males and females aged around 18-40, BM has an exceedingly narrower target market, aiming solely toward teenage girls on the skinny side [21]. As a result, BM was able to establish and emphasize a unique style for their clothes. In their collection, one will find tight crop tops, short flowery skirts, graphic tees, long cardigans, and everyday basics, often with light shades or neutral colors like pale blue, white, or light gray, displaying a classic retro 90s American laid-back style. While individual pieces may seem very simple, the harmonious color palette allows shoppers to quickly create a different but stylish look every day [4]. Successfully, BM set off a trend of style in China that derived from their design, referred to as BM "wind", or style [22]. The style is so favored that "it's easy to spot one of their signature items of clothing in public" [18]. Typically, it is quite difficult to distinguish what brand someone's clothes are from without seeing the logo or clothing label. However, the patterns and clothing style of BM is so distinctive that people can very easily recognize the brand, which helps the brand to advertise itself since the style immediately makes the brand more observable, which in turn tricks people into believing that more people are wearing their clothes than there actually are. Even if BM's competitors offer clothes with similar designs, people would still most likely assume that they are from BM since BM is known for that design and the only brand that offers no other styles, while other brands have a much more diverse and miscellaneous collection.

Moreover, the scarcity of offline stores led to more people gathering at the only two offline stores, resulting in extremely long queue times. One blogger posted on Xiaohongshu complaining that after waiting three hours in the sun to enter the store, the line for the dressing room and checkout was just as long. With the concept of herd mentality and social proof, long queues in the bustling areas of China's two largest cities will naturally arouse people's curiosity, thus bringing more attention to the brand. Seeing such a long line, people who have never shopped at BM would assume that BM's clothes are of good quality and aesthetics, which will increase the likelihood of them shopping at BM. Additionally, BM did a great job generating social proof that sticks around even when people are not wearing their clothes by applying the technique of behavioral residue. At the checkout counter of the stores, there are plates full of free BM stickers with various pretty designs. People who shopped at BM are willing to take the stickers and put them on their water bottles, phone cases, or computers because the stickers are cute and prove that they are part of the "BM club," which may boost their social currency. Some people shop at BM just to collect different designs to grow their sticker collection. They also started selling and trading stickers online in order to get the ones they want or don't own. While the consumers benefited from it, so did the brand itself. Since water bottles, phones, or computers are very publicly visible, the stickers make the brand more public, therefore facilitating imitation and providing chances for more people to talk about the brand.

4. Conclusion

All in all, BM's entry into the Chinese market is a successful and revolutionary move. Applying the techniques of Social Currency, Emotion, and Public in STEPPS, BM was able to develop unprecedented marketing strategies like social media-only, one-size-fits-all, or immersive in-store experiences that made the brand stand out from its competitors and won the favor of young women. However, in a fickle and ever-changing world, it might be challenging for the brand to always remain popular and keep its customers excited. Also, as time passes, more people in China might awaken from the existing feminine beauty standard and recognize the importance of accepting plus-size women and promoting body inclusivity and gender equality. By then, the current booming strategies and use of emotions might backfire, risking the brand's reputation and development. One may claim that BM is no different from luxury brands as both are exclusive groups. While the saying sounds logical, it is pretty urgent and necessary for BM to plan ahead and look in the long run in a world with a growing emphasis on diversity. It is time for BM and similar brands to think about steps to become more inclusive since it might result in a complete repositioning of the brand's image and marketing strategy.

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