FAST FASHION RETAILING CUSTOMER AND RETAILER'S PERCEPTIONS

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Abstract

The aim is to describe customers' and street retailers' perceptions related to Fast Fashion (F/F) Retailing. Through qualitative and quantitative research, data from São Paulo street retailers and Curitiba young people, Brazil, are collected, using sampling by convenience. Likert Scales have been used to evaluate F/F perceptions.One of the major differentials of Fast Fashion (F/F) in Brazil could be credit conditions, when retailers provide to their customers the possibility to pay purchases through the use of monthly instalments. It seems that there is a tendency that customers with some F/F knowledge and level of F/F consumption present positive perception of F/F quality, design and price. A theoretical contribution of this paper is to show some characteristics of Fast Fashion customer's behaviour related to the combination of F/F knowing and F/F consumption, using consolidate theories (Engel, Blackwell, Miniard, 2000; Kotler and Armstrong, 2008) with new concepts of Fast Fashion (Solomon and Rabolt, 2009).The managerial implications for the retail companies are to pay attention in the customer's behaviour that consumes Fashion items, especially Fast Fashion clothes and accessories, and the timing of collections.

Keywords: Fashion; Fast Fashion; Retailing Customers. Retailers.

1. Introduction

Fashion always has its role in people's life, especially from last Century, when the focus of attention in Fashion had spread throughout the world and in all social classes in different intensities. Fashion has become affordable even in different timing. First, in the royalty and noblesse, then in the richest without noble roots and breed, and finally, in the working class. Fashion is part of the culture and it is in the people's culture. Fashion influences and it is influenced by customer's behaviour. It is a vital part of different business, from designers, to manufactures and retailing, just to mention some of the fashion sectors. Even though, it seems that the Business Administration teaching programmes do not give the importance Fashion subjects deserve, because it is hard to find the subject in the contents of such programmes. One of the consequences is the shortage of well-developed professionals to work in the Fashion fields.

With reference to Brazil, the new middle class customers with discretionary wealth to be spent in clothes, shoes, handbags, cosmetics and accessories, looks for an environment not necessarily sophisticated and "chic", but pleasant and organised. One of the major differentials of Fast Fashion in Brazil could be credit conditions, when retailers provide to their customers the possibility to pay purchases through the use of monthly instalments.

In Brazil there is a quick response to fashion trends, as some companies work in integrated groups, through the strategy of fashion democratisation which enables middle class woman to have access to fashion. This satisfies expectations of low income women that are becoming more demanding and complete. A recent phenomenon is the speed of new fashion collections in the seasons' ones, when every four weeks are new looks in the shops, facing the traditional spams of fall/winter and spring/summer seasons' collections, which take four to six months from design development to retailing and to customer's consumption. As Grose (2012) mentioned: it is necessary to "…give people what they want when they want it". Considering that the speedy supply of new mini fashion collections inside a season is known as Fast Fashion, the aim of this study is to identify the customers and street retailers' perceptions related to Fast Fashion Retailing. As a result, the study emphasizes how important is the Business Schools' role in a way to develop contents linked to Fashion and its different categories, such as Fast Fashion Retailing, and prepare future professionals to deal with such different sides of Fashion.

2. Literature Review

The subjects of this research are presented in seven groups of contents: Fast Fashion Retailing, Customer Behaviour and Perception, Interface between retailer and customer, Price-quality relationship, Impact of online branding, Emotions, and Atmosphere. They are of great importance when it comes to helping the Business Schools to realise the need of developing Fast Fashion contents in their programmes.

Fashion retailing (BAM, 2012) is a group of companies, part of the fashion supply chain, that goes from the manufacturers to the consumer, offering fashion goods and services, through traditional seasonal spans and/or fast fashion timing, ranging from budget to designer price lines. It is the group of companies that "sell the merchandise to the ultimate consumer" (Solomon & Rabolt, 2009:7-10). According to Solomon and Rabolt (2009), there are different price lines in the sector that classify businesses depending on the quality level and price of their goods. The first group is the Haute Couture or *High Fashion* that is defined as 'fine sewing', very high-quality and custom-made. The second group is called *Prêt-à-porter* that includes expensive lines, but is much affordable and casual in style. The third group is the *Designer* one where the professionals develop secondary lines called bridge lines, made of lesser-quality fabric or licensed to another manufacturer. The fourth group includes *better goods* with lower prices, good quality of a lesser-known brand or name. The fifth group comprises *moderate goods* with lower prices and quality than better products and sold in department stores and specialty shops. And finally, the sixth group, made up of *budget goods* with the lowest price-quality approach, usually offered at discount stores or by mass merchandisers.

When it comes to timing as the focus of the analyses, there are two groups of fashion retailers, (1) the traditional ones that have a seasonal time span of 3 to 6 months, such as the fall/winter or spring/summer season.

> The fashion cycle is a little bit of an anachronism. We show the clothes in February and they're not available until July or August or September. By that point, images of the collection have been seen all over the Internet and discussed *ad nauseum* […] and by the time it reaches the store, people are already tired of it. […] the solution is to give people what they want when they want it (Grose, 2012:15).

The other group (2) is made up of fast fashion retailers. "Fast fashion is the term that is used to represent the various strategies that fashion companies use in order to respond commercially to the latest fashion trends". […] The younger fashion market shrinks the design to retail cycle to as little as 4 weeks making the top fashion designers available to the mass market in the same season" (Bruce, Moore, & Birtwistle, 2004:31-34). Fast Fashion is considered the high-street revolution, because if the masses cannot afford the original look from the Top Designers, then these professionals are prepared to go to the masses (Grose, 2012). Fast Fashion designers (also known as Reproducers) work together with a team of buyers and product developers to produces different looks in mini collections for a particular retailer (Grose, 2012:17).

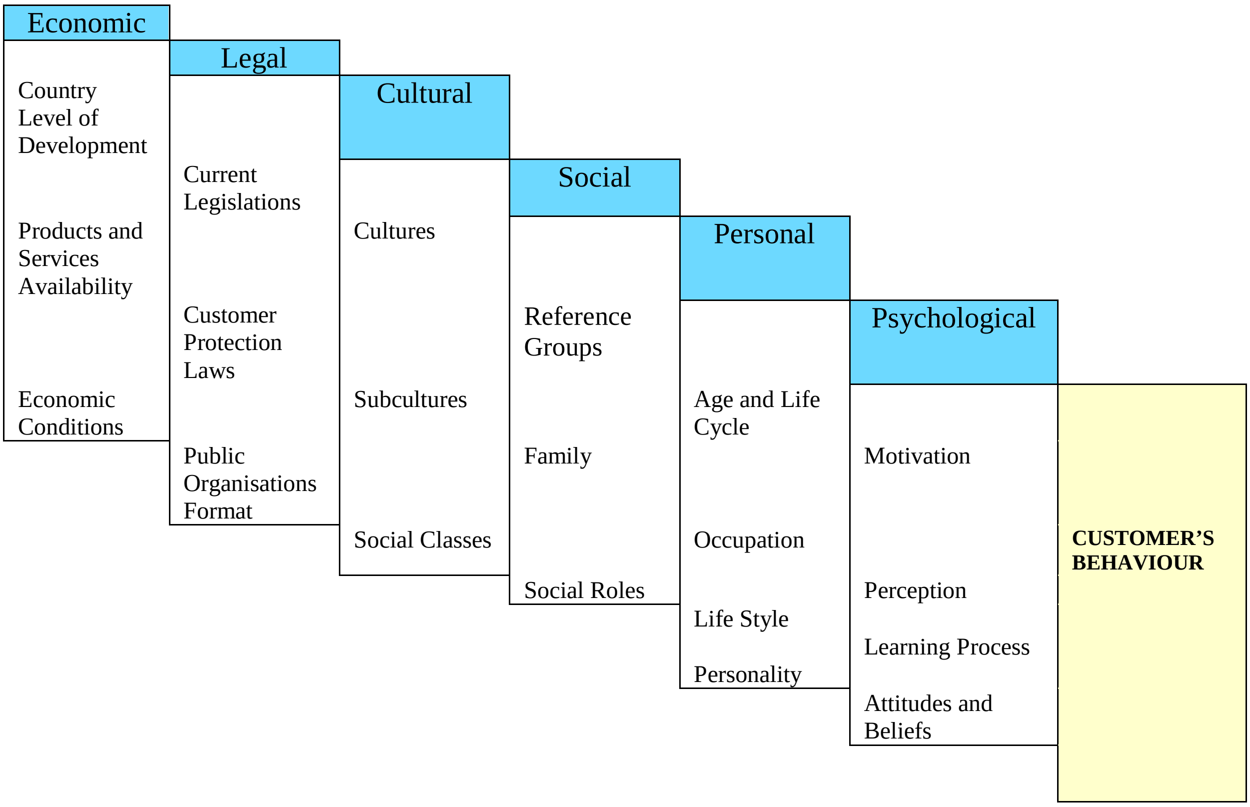
Customer's behaviour is a group of concepts and theories that covers different approaches of the consuming process. Initially the field refers to the "buyer behaviour" (Solomon and Rabolt, 2009:26-27), focusing on the interactions between customers and producers at the moment of purchase. Afterwards, a customer "is generally thought of a person who identifies a need or desire, makes a purchase, and then dispose of the product during […] the consumption process" (Solomon and Rabolt, 2009:27). The customer's behaviour is influenced by different factors related to cultural, social, personal and psychological elements (Kotler and Armstrong, 2008:113-125). Urdan and Urdan (2010:236-238) include economic and legal features, as it can be seen in Figure 1.

Perception starts with a first impression which is the initial step of customer's recognition process. Perception is the process of recognition through the human's senses (sight, sound, smell, touch, and taste), according to Lindstrom (2005) and Schmitt (1999). When an object is exposed to prospects and customers, one or more senses can be activated and the process of recognition begins in the people's mind. Perception, already influenced by people's past experiences (Brakus, Schmitt and Zarantonello, 2009), prints a mark, an image in their brain, producing positive, neutral or negative judgement related to the exposed object (Engel, Blackwell and Miniard, 2000: 97). Perception is related to the customer attitude which "is the general evaluation of an alternative" (Engel, Blackwell and Miniard, 2000: 93), being positive, neutral or negative. The attitude influences the behaviour and it formats future process of purchase. When it is crystallised in the customer's mind, it is very hard to be changed.

Different readiness stages of customer's behaviour (awareness, knowledge, liking, preference, conviction and purchase) can influence one's pattern of consuming (Kotler and Armstrong, 2008:363). The first stage of *awareness* is related to the level of consciousness of the product or service or organisation that the target audience has about them. The second readiness level is concerning of how much *knowledge* the prospects have about the product, the brand or any other item linked to the company. The third phase is the state of *liking*, which is how the target audience feels about the product, etc. The fourth element is the step that the prospects show *preference* (or they do not) for the product/service/experience/brand or organisation. The fifth component shows if the target audience develops a *conviction* about buying the organisation's offer. And, finally, the sixth element is related to the fact that the prospects have made the *purchase*.

To study the consumer behavior of Fast Fashion (F/F), the element of knowledge is linked to the phase of purchase, producing a matrix as it can be seen in Figure 2:

Figure 1 – Factors that influence Customer's Behaviour



Source: Adapted from Kotler and Armstrong (2008) and Urdan and Urdan (2010).

Figure 2 – The Relationship between Fast Fashion Knowledge and Consumption

		FAST FASHION KNOWLEDGE: YES	FAST FASHION KNOWLEDGE: NO
FAST FASHION CONSUMPTION	YES	F/F K+C (1)	F/F NK+C (4)
	NO	F/F K+NC (3)	F/F NK+NC (2)

Source: adapted from Kotler and Armstrong, 2008.

Interface between retailer and customer - Kinley (2010) developed a research project of useful application, with the purpose of determining whether clothing benefits sought (CBS) affected fit preferences, satisfaction with the fit of ready-to-wear, label style preferences, and shopping behaviours of North American women.

> The four CBS factors used in the study were: Fashion Forward, Sexy, Reputation, and Individualist. Study participants who desired Fashion Forward benefits preferred to shop in specialty stores and a tighter fit. Participants who sought Sexy benefits spent the most money on average, for a new pair of pants, preferred a tighter fit, clothing sized by waist dimension, and shopping in specialty stores. Participants who desired Reputation benefits from clothing shopped in specialty stores. Respondents who sought the Individualist benefits were more likely to shop via catalogue/internet (Kinley, 2010:397).

As practical implications, the author stressed that among so many stores, and a highly competitive retail environment, it would be useful for store professionals to target products and to understand that female customers who seek different benefits from their clothing do shop differently. This is an important cue in the relationship between retailers and customers. Marzo-Navarro et al. (2004) understood that globalization, competition and market saturation have caused a growing interest by firms in developing strategies directed at creating brand loyalty among their customers, especially in markets with low growth rates.

Relationship marketing would be crucial to achieve this goal, as contemplates mutual benefits derived from stable relationship between buyers and sellers. Although the study focused on customers from the service sector, it appeared useful for the present paper, given the emphasis on the benefits of the relationship with the contact personnel: customers can reach greater levels of satisfaction and loyalty toward the organisation (the retailer in the present case). Concerning the support that sales personnel can offer to customers, Bruce and Daly (2006) raised questions about traditional approaches to sourcing and buying in the complex retail nature of fast fashion of a supermarket, a department store and a own brand label. The authors found that Fast Fashion is a combination of global and local suppliers in which trust is an important factor in the supplier-retailer relationship to ensure fast delivery at an agreed quality, and integration of key internal activities and processes to facilitate the speed of buying decisions that may be required.

Price-quality relationship **-** When looking for a store, customers believe there is a strong relationship between price and quality, as there is between brand and quality. For this reason they perceive as of higher quality, items with a designer brand or a higher price, when comparing similar pieces of apparel. Fowler and Clodfelter (2001) developed a study aiming to compare the pricing and quality of identical designer merchandise sold in department stores and manufacturers' outlet stores. Prices in the department store were 31% higher than in the outlet store, the quality was the same in both formats of retail. A more recent study could indicate how street stores are positioned when compared to department or outlet stores.

Impact of online branding **-** Rowley (2009) aimed to contribute to knowledge on online branding, and the way in which the online channel is being used to support brands. As the focus of this research was the top multi-channel UK fashion retailers, the study resulted interesting for the present paper. The author found that most top "non-value" fashion retailers offer transactions through their web site, offering extended opportunities for brand engagement and experience to their customers. While all fashion retailers achieve consistency of visual identity between the online and other channels, their use of the online channel to communicate brand values, and to promote brand relationships may be academically underdeveloped. Research into online and multi-channel branding has a role to play in supporting this process, which could be useful to understand better and support the interface between fast fashion retailer and customer.

Emotions - Moody, Kinderman and Sinha (2010) found strong relationships between mood and personality factors and clothing style preference. Mood was a significant predictor of preference, while personality was moderate. These research findings may lead to practical consequences: Personality, emotion and mood were shown to be managed and reflected through clothing with implications for assistance in customer clothing decisions, service training, and strategies for personal shoppers, market segmentation and design.

Atmosphere - Parsons (2011) stated that stimuli have a significant effect on fashion customers' affect for a store. He defined shopper responses to a few main stimuli: music, scent, temperature, lighting and colour. Based upon his research, fashion retailers are less differentiated in their use of sensory stimuli than they could be to achieve the responses they expect. According to the author, stagnation from repeated exposure can diminish affect for the store whereas small changes in stimuli levels can revitalise and increase affect.

3. Research Methodology

The methodology includes some aspects (Gil, 2002; Malhotra, 2001; Mattar, 2007, Siegel and Castellan, 2006, Spiegel, 1971 and Wonnacott and Wonnacott, 1981): the nature of the research and the population and sampling.

3.1 The nature of the research

This investigation is a qualitative and a quantitative study (Creswell, 1998; Gil, 2002).

The qualitative analyses are used to assess the retailers' responses. A structured protocol was applied on the interviews with the Fast Fashion street retailers to gather data related to the store as the interface between retailer and customer; how is the way customers evaluate physical facilities, or not; if they make comparisons with different kinds of shops, such as street stores, the ones in shopping malls and online shops; and to identify if customers evaluate Fashion services, for instance, clothes repair and renting, as well as to find out the environmental factors of a store they consider. Due to the format of this article, the qualitative analyses are not presented in the form of quotes. They are summarised the way they are presented in the Results section.

Through the use of comparative analyses, customers' perceptions concerning Fast Fashion are also evaluated. The Rattam (1998) protocol is used on customers' information to create social classification (Rattam, 1998) based on the level of formal education, income, spatial residential area, size of residence and occupation. The Rattam social classification Model (Rattam, 1998) is based on the idea that formal education level, size of residence, and occupation are more important than income in order to format customer behaviour and to classify the segments as A, B, C, D and E. The protocol was used to identify in which segment the respondents are classified. Communication with the respondents was face-to-face. The researcher supplied the questionnaires, respondents answered the questions and they returned the document to the researcher as soon as they had filled in the forms. Some information were collected about the customers' characteristics, such as their profile, the customers' level of knowledge related to Fast Fashion; their feelings and emotions concerning Fast Fashion; and the customers' consumption process of Fast Fashion.

Simple statistical analyses have been used to describe street retailers' and the customers' characteristics and some cross tabs analyses to produce their responses. Some results have been measured on 11-point scales and some 5-point Likert-type scales (+2 = strongly agree, for positive statements, and -2 = strongly disagree, for negative statements) (Mattar, 2007:111; Ferguson, 1941). The format of Likert scales was adapted from the Fishbein Multiattribute Model scales (Engel, Blackwell & Miniard, 1990). Neither the SPSS nor the Mann-Whitney tests were used to organise the data, but they could be applied when working with larger samples (Wonnacott and Wonnacott, 1981). The data collected have been organised to meet the operational objectives of this article.

3.2 Population and Sampling

The population of the research is made up of two different groups: street retailers that merchandise Fast Fashion clothing and accessories and Fast Fashion young customers. According to IBGE (2014a), the Brazilian Institute of Geography and Statistics, the population are more than 206 million people. More than 11 million are living in Parana.

Younger residents between 15 to 29 years old are an average of 39% (IBGE, 2014b) in Parana. According to Retailing research (IBGE, 2014c), there are more than 150 thousand registered companies that present some revenue.The *samples are selected by convenience*: (1) 20 managers and/or owners and sales people of 11 stores in Sao Paulo City, Brazil; and (2) a customers' sample. The customers' sample contains 80 Brazilian people aged between 18 and 30 years old, living in Curitiba, Parana. Tables 1 and 2 show some of the sampling characteristics. The interviews with the street retailers took place in November 2012 and the customers' survey was conducted in January 2014.

Table 1 – Interviewed Professionals by store and business

Stores	Business	Quantity of Interviewed F/F Street Retailers
Binne	Shoes and handbags	1
284 Store	Clothes	1
Farm	Clothes	1
French B.	Clothes	2
Hering	Clothes	2
Honora	Clothes	2
Le Lis Blanc	Clothes	2
Mya Haas	Shoes and Handbags	3
Riachuelo	Clothes	3
Sephora	Cosmetics	2
UP Delta	Clothes	1
Total		20

Source: Survey, 2012.

Although a random sample is technically more adequate to produce precise results which represent the characters of the population, there are reasons to select the sample by convenience (Mattar, 2007), for instance, in cases when: (1) there is not available database to list the population's members and produce a random sample, and (2) the financial and human resources are limited to use a random sampling process.

Table 2 - Sampling Characteristics - Customers

Gender	Total	%
Male	43	54
Female	37	46
Total	80	100

Source: survey, 2014.

4. Results

The information of customers and retailers' perceptions related to Fast Fashion Retailing is presented in two sections: (1) street retailers' characteristics and their responses to Fast Fashion which consolidate the qualitative analyses mentioned in the Methodology and (2) customers' Profile and their Perception of Fast Fashion through quantitative analyses.

4.1 Street retailers' characteristics and their Responses to Fast Fashion

As it is explained in the Methodology, 20 street retailers have been interviewed. They were managers/owners and/or sales people of 11 stores in São Paulo City, Brazil, in November 2012. Eight stores were in the clothing business, two in shoes and handbags and one in cosmetics. This information is shown in Table 3.

Table 3 – Interviewed street retailers by store and business

Stores	Business	Interviewed people/Position
Binne	Shoes and handbags	Sales person – Owner – Stock supervisor
284 Store	Clothes	Store supervisor – Manager
Farm	Clothes	Sales person (1)
French B.	Clothes	Sales people (2)
Hering	Clothes	Sales people (2)
Honora	Clothes	Sales people (2)
Le Lis Blanc	Clothes	Sales people (2)
Mya Haas	Shoes and purses	Sales people (3)
Riachuelo	Clothes	Manager and sales people (3)
Sephora	Cosmetics	Sales people (2)
UP Delta	Clothes	Owner/manager – Sales person/supervisor

Source: Survey, 2012.

Following the interview script, the street retailers were asked about the following subjects:

1. Stay in the store – how long do customers usually stay in the store?
2. Motivation – why do your customers buy: pleasure, modernity, inclination for the new, other reasons?
3. Store as interface between retailer and customer: why do customers look for this store?
4. Trends in retailing: Do customers value physical facilities?
5. Street retail stores: How do customers compare the street stores with those in malls or shopping centres?
6. Street retail stores: Why are they attractive?
7. Specialised stores: Do customers prefer this kind of store?

8. Stores of fashion services: Do customers value them?
9. Hypermarket with fashion items: are there many in the region?
10. Online retail*:* is the customer migrating to shop online?
11. Marketing and environmental factors of a store. Whose elements the Customers value in a store (Atmospherics): Size; Layout; Decoration; Colours; Atmosphere; External and internal presentation; Windows; Lighting; Aromas and perfumes; Sound; and Taste appeal

Interpreting the data collected in the interviews, the most important aspects verbalised are related to - Motivation to go to a street store; - Interface retailer-customer; - Price and - Marketing and environmental factors of a store.

Customers usually *stay in the store (1)* between 15 to 30 minutes to look around for products, but they can stay really longer when they decide to buy, as well as if they have an event (a gala dinner, a ball or a celebration), or if they are interested in new trendy pieces. Table 4 shows the differences of timing inside the stores.

Table 4 – Timing in the stores

Stores	How long the customers stay in the stores?
Binne	20 minutes
284 Store	5 – 15 minutes
Farm	45 minutes
French B.	20 min – 1 or 2 hours
Hering	15 minutes
Honora	15 minutes
Le Lis Blanc	15 – 40 minutes
Mya Haas	30 minutes – 2 hours
Riachuelo	40 minutes
Sephora	15 minutes
UP Delta	30 minutes – 3 hours

Source: Survey, 2012.

Concerning *motivation (2)*, customers buy for many reasons: because of the brand status, price (less expensive than other options of young fashion of the A class niche of customers), quick answer to trends and high product turnover (weekly supply of new products, Fast Fashion concept), modernity and inclination for the new. Sometimes they look for specific clothes for an event. In other cases, they come for pleasure, just for the fun of trying on something nice or in fashion that they see in the shop windows. To look for a store for a last minute gift, to buy basic clothes. Occasionally customers buy at the store because it offers lower price and allows them to constantly go in fashion. To look for quality, good service, direct contact, strong brand, and pleasant environment. Besides to offer price and fashion, the stores offer credit conditions, such the use of monthly instalments. At times customers need clothes for a special event or to get something new, as to renew the wardrobe or require mostly comfort, possibly in fashion and visually attractive. Customers look for innovative concept, luxury environment. They buy as novelty, as fashion, as experience.

In a similar aspect, *the store can be seen as an interface between retailer and customer (3)*. When asked the reason customers look for some specific store, professionals say that the store is located close to a business related to their products; therefore people pass by every day and they have a good relationship with the sales people and manager. Sales people sometimes play the role of psychologists.

There is a strong relationship between staff and customers, which generates friendship and loyalty. Sales employees believe that customers look for a store because it can really satisfy their needs better than in the competitors. As many customers are already extremely faithful to the store, Sales people and owner (also manager) are careful to satisfy their needs so that they do not quit coming to the store and still keep buying there. The staff understand that it is important to be sincere in many aspects and not only getting customers to buy any piece. It is important to analyse the value of customer services.

When sales people are trained to understand customers' needs, they can offer the best services, to assure that the customers come back once, twice, many times. Sales employees often personalise service and they are always updated about the recent trends, so that they can serve customers as personal shoppers. Customers also appreciate sales people's cordiality. Sometimes most customers already have a close relationship with the frontline employees in the store where they usually buy. Therefore, the sales staffs are always very helpful and willing to serve customers the best way possible. Customers also can focus on price and value of the product, for its power and status. Sometimes, for some companies, price is extremely competitive because the target is the middle class customers favoured by the economic situation of Brazil, from 2004 to 2014. If a store is part of a group that produces, distributes, sells products and services and it can offer credit through its companies, assuring more favourable conditions of logistics and price than the competitors. Practices of the strategy of fashion democratisation, i.e, fashion products designed by sophisticated Brazilian stylists and sold with very reasonable price to middle class customers, can attract customers for some stores.

The perception of product quality makes customers ready to pay more for an item. Windows are very important to stores, because people do window shopping in some occasions, they know what it is available in the store and they decide to purchase when they are not in a hurry later on. Sometimes customers work or live close to the store and they buy there because it is close.

For many customers, retailing is not limited to *physical facilities (4).* Sales people understand that emotion must be stressed as a way to attract and retain customers. They give priority to the *meeting point* with the customer, as one of easy access. Some professionals say that there are customers that go to the store only to chat with the sales people, not necessarily to buy. Emotion must be stressed as a way to attract and retain customers.

Normally *customers compare street stores with those in malls or shopping centres (5*)**,** concerning safety, easy access, and added glamour to better economic conditions to middle and low income population. Some stores emphasize the practicality of street stores. For people in the neighbourhood, the access is easier than in the malls: parking lots are of easier access, faster and free. When customers are willing to buy something specific, it is faster to buy at a street store than in a mall. Sometimes street stores sell more than the shops in malls. Some shops are more attractive and larger, they are strategically located in places with huge people circulation and their access with the customers is more direct.

Street retail stores are attractive (6) because they agglomerate many groups of products in the same place. Stores offer a mix of clothes, bedding, shoes, cosmetics, jewellery, home appliances, electronic sets, etc. it is important to have prestigious brands around. People like to walk on the streets and buy. Street retail stores are in a geographic region where collections and partnerships are launched.

When they are asked about *specialised stores (7)***,** professionals state that customers prefer some kind of store when they need of quality. It is important to have skills in building an environment for the store, according to each kind of product.

Customers value fashion services (8). Some shops emphasise the need of good service, aligned to customers' expectations and desires. Others offer services of sewing and arrangements that customers may need to clothes being bought in the store. One of the researched shop has a space inside the store that offers services of aesthetics and body treatments as shiatsu, massage, manicure, depilation, and comfortable chairs, LCD TV, DVD, WiFi and even IPad for customer entertainment.

Hypermarket (9) of fashion items seem not to exist so much in the researched region. This type of store has self-service, supported by the purchase by impulse. Products are well exposed and have competitive prices. The stores plan an exhibition according to the customer.

When asked about *online retail (10)*, retailing professionals see some migration, in an increasing and accelerated path, because customers know what to access and where to find what they need. The use of Internet already reaches typical customers of the region. Direct sales of cosmetics are partners of Internet. Some stores have viewed e-commerce more cash-oriented than a channel of brand communication with the customer. It generates considerable amount of sales. Some customers go to the store as a program with friends that like to buy what is more frequently used by famous Brazilian fashion blogger. In order to reach the target, the stores have invested in these blogs, sending products to the editors that publish looks and give credits to the brand. E-commerce can be competition for street stores, but also serves customers who live in geographic regions far from the physical stores. Some stores have e-commerce. One company became a physical store in Brazil after a long period of e-commerce with a huge American department store chain. Therefore, one supports the other, as the website stock is significantly larger and diverse, comparatively. In the stores, Sales people help the customers. Other companies do not have e-commerce, but uses Internet and social networks not only to communicate special sales, trends and novelties, but also for the relationship with the customers that are immerse in the Internet.

Finally, *Customers value some marketing and environmental factors of a store (11)*, for instance, size, lay-out, decoration, colours, atmosphere, external and internal presentation, windows, lighting, aromas and perfumes, sound and taste appeal.

4.2 Customers' Profile and their Perception of Fast Fashion

As it is explained in the Methodology, the final group of respondents is represented by 80 young customers, aged between 18 and 30 years old, 54% masculine and 46% feminine, residents of Curitiba, Parana, Brazil, from Classes A, B and C (Rattam 1998). The monthly income for 58% of male and 40% of female is higher than £ 1,200. Their professional ranks are mainly of lower level staff, middle level executives and/or small business owners (74% of males and 78% of female). All respondents are still on the undergraduate level of education.

Customers present different responses related to the Fast Fashion knowledge and their level of F/F consumption, for both genders, as it is visualised in Table 5.

In the Feminine segment, 24 respondents out of 29 (83%), that show some Fast Fashion Knowledge, present some level of F/F consumption. In the Masculine group, all 21 customers know about F/F and they consume F/F items. Comparing both groups, 78% (29/37) of the Feminine segment consumes F/F products and the Masculine segment, only 49% (21/43).

Customers of different status of F/F knowledge *versus* F/F non-knowledge and F/F consumption *versus* F/F non-consumption present different evaluation concerning to the elements of Fast Fashion (Quality, Design and Price of F/F items), as it is shown in Table 6.

Table 5 – Fast Fashion (F/F) Knowledge *versus* Level of F/F Consumption

F/F Knowledge	Masculine (43)				Feminine (37)				Customers (80)			
	Level of F/F Consumption											
	Consume		Not consume		Consume		Not consume		Consume		Not consume	
	f	%	f	%	f	%	f	%	f	%	f	%
Know F/F	21	100	12	55	24	83	4	50	45	90	16	53
Not know F/F	0	0	10	45	5	17	4	50	5	10	14	47
Total	21	100	22	100	29	100	8	100	50	100	30	100

Source: Survey, 2014.

Table 6 – Levels of F/F knowledge, Levels of F/F Consumption and Customers' F/F Perception

Customers' F/F Perception related to:	F/F Quality				F/F Design				F/F Price			
Gender	Masculine		Feminine		Masculine		Feminine		Masculine		Feminine	
Levels	f	Scores	f	Scores	f	Scores	f	Scores	f	Scores	f	Scores
F/F Knowledge vs F/F Consumption	21	6.34	24	6.38	21	8.24	24	7.75	21	5.81	24	5.83
F/F non-Knowledge vs F/F non-consumption	10	5.00	4	5.25	10	7.00	4	6.75	10	4.70	4	4.25
F/F Knowledge vs F/F non-consumption	12	5.58	4	4.25	12	7.25	4	7.00	12	5.42	4	4.5
F/F non-knowledge vs F/F Consumption	0	0	5	6.20	0	0	5	7.00	0	0	5	6.60
Total	43		37		43		37		43		37	

Source: Survey, 2014.

It seems that there is a tendency that customers with some F/F knowledge and level of F/F consumption present higher scores related to the perception of F/F characteristics, even if the frequencies are lower in 3 out of 4 levels of F/F knowledge and consumption. As shown in Table 7, there are 4 different statements of Likert Scale to identify how customers evaluate F/F stores, their Visual & Merchandising, the clothes' collections and the product displays.

Table 7 - Statements of Likert Scale

Statements
The Fast Fashion retail stores are more organised than the ones that sell the more traditional Fashion.
The Visual & Merchandising is better in Fast Fashion retail stores.
The assortment of clothes and accessories is better in Fast Fashion retail stores.
The clothes and accessories displays in the retail point-of-area are better in Fast Fashion retail stores.

Source: Survey, 2014.

Table 8 shows the table that includes the customers' evaluation, gender and the information to produce the Likert Scale, related to the four statements. The combined levels of F/F knowledge with F/F consumption that show the respondents behaviour are based on the matrix of figure 2.

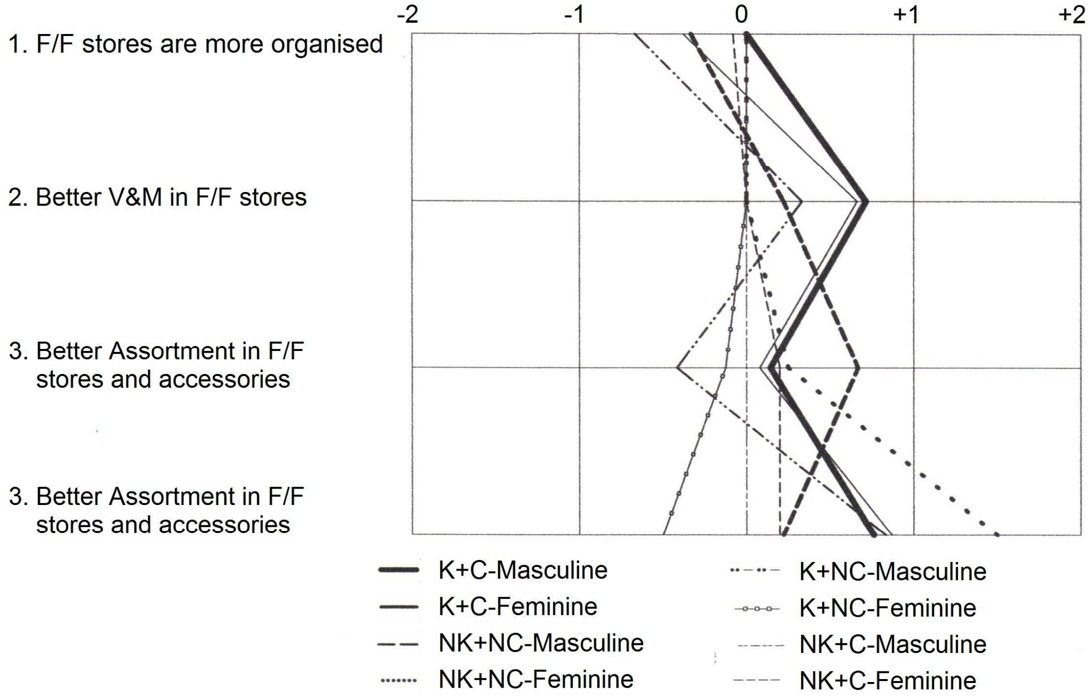
Table 8 – Customers' Evaluation of F/F Elements Likert Scales

Customers' F/F Evaluation related to:	1. The Fast Fashion retail stores are more organized than the ones that sell the more traditional Fashion				2. The Visual & Merchandising is better in Fast Fashion retail stores.				3. The assortment of clothes and accessories is better in Fast Fashion retail stores				4. The clothes and accessories displays in the point-of-area are better in Fast Fashion retail stores.			
Gender	Masculine		Feminine		Masculine		Feminine		Masculine		Feminine		Masculine		Feminine	
Levels	f	Scores	f	Scores	f	Scores	F	Scores	f	Scores	f	Scores	f	Scores	f	Scores
(1) F/F Knowledge vs F/F Consumption	21	+0.047	24	-0.333	21	+0.762	24	+0.708	21	+0.190	24	+0.125	21	+0.809	24	+0.917
(2) F/F non-knowledge Vs F/F non-consumption	9	-0.333	4	0.000	9	+0.222	4	0.000	9	+0.667	4	+0.250	9	+0.222	4	+1.500
(3) F/F Knowledge vs F/F non-consumption	12	-0.667	4	0.000	12	+0.333	4	0.000	12	-0.417	4	-0.125	12	+0.833	4	-0.500
(4) F/F non-knowledge Vs F/F Consumption	0	NIHIL	5	-0.080	0	NIHIL	5	0.000	0	NIHIL	5	+0.200	0	NIHIL	5	+0.200

Source: Survey, 2014.

The highest score of compliance (agreement *versus* disagreement) is from the Feminine segment (+1.500), in the level of F/F non-knowledge plus F/F non-consumption concerning to the statement 4 ("the clothes and accessories displays in the point-of-area are better in Fast Fashion retail stores"), although this results should be analysed very carefully, because the frequency is too small (4). The lowest score is from the Masculine group (-0.667), in the level of F/F knowledge plus F/F non-consumption linked to the statement 1 ("Fast Fashion retail stores are more organized than the ones that sell the more traditional Fashion"). The data of the Table 3 produce the Likert's Scale that can be visualised in the Figure 1.

Figure 1 – Customers' Evaluation of F/F Likert Scales – Graphic



Source: Survey, 2014.

Customers are influenced and they also influence the people around in the Consumption Process of Fashion, although some of them state that they are by themselves in the decision of what to wear (95% of Masculine group and 36% of the Feminine segment in Table 4) and they do not exchange Fashion ideas with other people (33% of Masculine and 19% of Feminine in Table 9).

Table 9 – F/F clothes and accessories – Decision Maker

Who decides which clothes and accessories the customer is going to wear?	Masculine		Feminine		Customers	
Frequency and %	f	%	f	%	f	%
The customer, always.	30	70	23	62	53	66
The customer, almost all of the time	11	25	13	35	24	30
Somebody else (e.g. mother or girl-friend)	2	5	1	3	3	4
Total	43	100	37	100	80	100

Source: Survey, 2014.

Friends play a common role as the ones exchange ideas of which clothes and accessories the customer is going to wear (frequency of 19 in Masculine group and of 15 in the Feminine one, in Table 10), as well as who asks for Fashion Advice to the customers (frequency of 11, Masculine and of 8 in Feminine group, in Table 11).

The Feminine customers mention their mother as one of the persons they go for help, to exchange ideas (frequency of 17 in Table 10) or as the one who asks them for advice (also frequency of 17 in Table 11).

Table 10 – F/F clothes and accessories – Exchanging Fashion Information

Does the customer exchange ideas of which clothes and acces-sories he/she is going to wear?	Masculine		Feminine		Customers	
Frequency and %	f	%	f	%	f	%
No	14	33	7	19	21	26
Yes	29	67	30	81	59	74
Total	43	100	37	100	80	100
With Whom? (Multiple choice)						
Friends	19		15		34	
Mother	5		17		22	
Sister	5		8		13	
Others	20		22		42	

Source: Survey, 2014.

Table 11– F/F clothes and accessories – Customer as Fashion Advisor

Who asks the customer's advice related of which clothes and accessories the person is going to wear?	Masculine		Feminine		Customers	
Frequency and %	f	%	f	%	f	%
Nobody asks for advice	16	37	7	19	23	29
Somebody asks for advice	27	63	30	81	57	71
Total	43	100	37	100	80	100
Who? (Multiple choice)						
Mother	-		17		17	
Friends	11		8		19	
Sisters	8		8		16	
Brothers	5		7		12	
Girl friend	6		6		12	
Others	16		17		33	

Source: Survey, 2014.

There are different patterns of purchase per type of clothes and accessories, as it is listed in Table 11. The higher frequencies are in bold numbers. Some repeated frequencies of purchase are "every two months" and "twice a year" for T-shirt, shirt and *Jeans*; "once a year" for shoes and accessories (handbags and belts); and mainly "only on special occasions" for shorts and skirts, knapsacks, boots and sandals.

"Basics" is the first group of items that is in the preference of both segment of customers, Masculine and Feminine, with frequency of 139 and 208 (Table 12, next page). From its results, it seems that the Feminine segment purchase Fast Fashion items more than the Masculine Group (110 and 46), although it seems the latter is showing some level of F/F consumption.

Table 11 – Frequency of Purchase per type of Clothes and Accessories

Clothes or Accessories	Every Week		Every 2 Weeks		Once a Month		Every 2 Months		Twice a Year		Once a Year		Only special occasions		Other Frequency	
Gender	M	F	M	F	M	F	M	F	M	F	M	F	M	F	M	F
Vest	0	0	0	1	0	3	2	6	2	10	10	8	10	1	19	8
T-shirt	1	0	0	0	9	4	16	14	11	4	4	6	0	1	2	8
Shirt	1	0	1	1	5	2	13	9	14	8	7	8	1	3	0	6
Blouse	1	0	0	0	2	3	8	16	14	10	17	4	1	0	0	4
Jeans pair of trousers	1	0	0	0	1	1	17	11	14	14	13	6	1	1	2	4
Other type of Trousers	1	0	0	0	0	0	6	4	6	9	11	14	14	2	5	8
Short	1	0	0	0	0	1	1	2	16	10	20	7	3	4	2	13
Saia	0	0	0	2	0	0	0	4	0	3	0	12	0	6	0	10
Skirt	0	0	0	2	0	1	0	6	0	8	0	11	0	5	0	4
Handbag	0	0	0	0	0	0	0	2	0	6	0	14	0	7	0	8
Knapsack	1	0	0	0	0	0	0	0	1	4	10	4	20	10	10	19
Belt	1	0	0	0	0	0	2	1	6	0	16	9	15	9	3	16
Socks	1	0	1	1	3	2	10	15	14	8	11	6	1	0	2	5
Training shoes	1	0	0	0	0	0	7	2	10	10	18	15	2	4	5	6
Shoes	1	0	0	0	0	2	5	9	6	8	13	7	13	5	5	6
Sandals	0	1	0	0	0	1	1	3	2	10	2	7	7	10	31	5
Boots	0	0	0	0	0	0	0	0	2	8	2	17	10	4	29	8
Flip-flops	1	0	0	0	0	1	2	5	7	11	20	13	5	3	8	4

Source: Survey, 2014.

Those characteristics presented in the previous tables (the roles the customer plays in the consuming process – decision marker or advisor - and the frequency of purchase) are part of the Fashion customer behaviour.

5. Final Comments, Limitations and Future Research Directions

Based on the information gathered in the street retailers, Fast fashion seems to be mostly focused on customer. The target seems to be primarily young people (age 12-35, according to Farm,) with high level of information about fashion (284 Store), great visibility with the physical store space and emphasis on the brand. The relationship between retailers and customers is very important, as Marzo-Navarro (2004) and Bruce and Daly (2006) pointed out, as contemplates mutual benefits. As analysed by Fowler and Clodfelter (2001), customers perceive the relationship between price and quality, or brand and quality: higher quality can be accepted with higher price.

Table 12 – Clothes and Accessories – Quantity and Classification

Clothes or Accessories	Fast Fashion		Formal wear		Basics	
Gender	M	F	M	F	M	F
Vest	4	2	0	0	10	21
T-shirt	-	8	0	1	12	14
Shirt	6	0	14	22	3	1
Blouse	8	14	1	1	11	10
Jeans	3	6	2	1	15	18
Other type of Trousers	3	5	4	9	6	10
Short	2	8	1	0	14	13
Saia	0	8	0	5	0	2
Skirt	0	8	0	5	0	3
Handbag	0	4	0	7	0	8
Knapsack	3	4	0	0	7	13
Belt	2	2	7	6	8	10
Socks	2	1	0	0	14	20
Training Shoes	7	7	0	0	8	13
Shoes	2	10	0	1	6	12
Sandals	0	11	0	3	4	7
Boots	2	10	0	1	6	12
Flip-flops	2	2	1	0	9	21
Total	46	110			139	208

Source: Survey, 2014.

The major differentials of Fast Fashion in Brazil could be credit conditions. Between 2004 and 2014, Brazil has passed through significant shift in the composition of income stratification of the Brazilian society. Poverty indices reduction allowed a reference to a ‘new middle class,’ defined by an enlarged C class. The access to better jobs assures higher wages and discretionary income to the families. High rates do not allow them to invest in real estate or to assume any other long term credit. Therefore, the ‘new middle class’ takes advantage of the retail credit to buy personal goods, electronics, items of relatively low price previously considered ‘luxury’ for this socioeconomic class. Although rates are still high, the credit is offered with many instalments, allowing the purchase of many goods at the same time.

There is a quick response to fashion trends, as some companies work in integrated groups, through the strategy of fashion democratization which enables middle class woman to have access to fashion, it satisfies expectations of low income women that are becoming more demanding and complete. The impact of online branding is felt as Rowley (2009) defined, that is the interface between fast fashion retailer and customer. Online channel communicate brand values, while fashion retailers achieve consistency of visual identity. Emotions are extremely important, when considering the new Brazilian middle class customers with discretionary wealth to be spent in clothes, shoes, purses, cosmetics and accessories.

Very effective were the findings of Moody, Kinderman and Sinha (2010), in the sense of the strong relationship between the mood, emotion and personality factors and clothing preference. Concerning atmosphere, the stimuli suggested by Parsons (2011) seemed to be perceived by customers that look for an environment not necessarily sophisticated and "chic", but pleasant and organised. It should be a store where the customer can easily locate and find the items that he/she wants. It can be modern, with or without sound, aroma/perfume and taste appeal, but a store that responds to his/her anxiety of being 'in', despite the reasonably simple environment. Once in a while the store has to go through reforms, changing the visual identity, the product distribution inside, and sometimes even moving walls. This is important for the customers to constantly notice the brand innovation.

According to the results related to customers, some information can be summarised as follows. Customers present different responses related to the Fast Fashion knowledge and their level of F/F consumption, for both genders. In the Feminine segment, 83% of the respondents, that show certain Fast Fashion Knowledge, present some level of F/F consumption. In the Masculine group, all customers part the survey, know about F/F and they consume F/F items. Comparing both groups, 78% of the Feminine segment consumes F/F products and the Masculine segment, only 49%. It seems that there is a tendency that customers with some F/F knowledge and level of F/F consumption present higher scores related to the perception of F/F characteristics. The highest score of compliance (agreement *versus* disagreement), through Likert Scale is from the Feminine segment (+1.500), in the level of F/F non-knowledge plus F/F non-consumption concerning to the statement 4 ("the clothes and accessories displays in the point-of-area are better in Fast Fashion retail stores"), although this results should be analysed very carefully, because the frequency is too small.

The lowest score is from the Masculine group (-0.667), in the level of F/F knowledge plus F/F non-consumption linked to the statement 1 ("Fast Fashion retail stores are more organised than the ones that sell the more traditional Fashion"). Customers are influenced and they also influence the people around in the Consumption Process of Fashion, although some of them state that they are by themselves in the decision of what to wear (95% of Masculine group and 36% of the Feminine segment) and they do not exchange Fashion ideas with other people (33% of Masculine and 19% of Feminine). Friends play a common role as the ones who exchange ideas of which clothes and accessories the customer is going to wear (frequency of 19 in Masculine group and of 15 in the Feminine one, as well as who asks for Fashion Advice to the customers (frequency of 11, Masculine and of 8 in Feminine group).

The Feminine customers mention their mother as one of the persons they go for help, to exchange ideas or as the one who asks them for advice concerning to what to wear. "Basics" is the first group of Clothes that is in the preference of both segment of customers, Masculine and Feminine, with frequency of 139 and 208, respectively. From its results, it seems that the Feminine segment purchase Fast Fashion items more than the Masculine Group, although this latter is showing some level of F/F consumption.

The practical implications for the retail companies are to pay attention in the customer's behaviour that consumes Fashion items, especially Fast Fashion clothes and accessories and the timing of collections. As Grose (2012) mentioned: it is necessary to "…give people what they want when they want it".

One of the contributions of the research is to show some characteristics of Fast Fashion customer's behaviour related to the combination of F/F knowing and F/F consumption, using consolidate theories (Engel, Blackwell, Miniard, 2000; Kotler and Armstrong, 2008) with new concepts of Fast Fashion (Solomon and Rabolt, 2009). The other contribution is concerning of the interfaces between F/F retailers' and their customers, highlighting some aspects of these relationships, such as, the atmospherics' elements (Schmitt, 1999; Lindstrom, 2005), the salespeople closeness, the season's must-have, the sewing and repairing services, among other features shown in the study. The main issue is to show the importance of Business Schools' role in a way to develop contents linked to Fashion and its different categories, such as Fast Fashion Retailing and to prepare the future professionals to deal with such different sides of Fashion.

This study has some limitations. The type of study explains the results only for the sample units. The two surveys are conducted in separated period of time and in different cities of Brazil. Only street retailers are interviewed. The professionals that work in mall stores (Chase, 2012) are not included in the study. Due to copyrights issues, the brands' images, logos, etc. are not shown is the study, only their names which are extracted from public sources.

Future research on the field could be addressed to: (1) to improve the knowledge of Fast Fashion concepts and (2) how to evaluate the customers' and street retailers' responses. (3) The research format and its methodology can be used to study different kinds of retailing, such as mall's stores and online shops. (4) It is also possible to study the relationship between social class and customer's perception. (5) To use Mann-Whitney test, larger samples and random sampling can improve the quality of the results. And (6) to study the levels of importance of Fast Fashion (F/F) between developed and emergent countries.

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