Fast fashion brand – the brand of clothes or of store?
The case of Polish female buyers

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Abstract

When women buy clothes what brand do they have in mind: the brand of clothes or the brand of store? Fast fashion industry is famous for copying designers’ clothes and offering basically lookalike apparel. The question is what really differentiates the offers of competing retailers. The experiment has been carried out to check whether female buyers will notice changes in branding of clothes. The research seems to prove that as long as consumer is aware of the brand of the store she does not take any notice to changes introduced to the labels and hangtags attached to the clothes. The managerial implications of the fact has been explored.

Key words:

Brand, fashion, store brand, fashion brand
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Theoretical framework

In many respects fast fashion brands differ from other brands of consumer goods (Tungate, 2004). Their symbolic meaning (in words of Vincent Peters: “You don’t buy clothes – you buy an identity”; Tungate, 2004) is by far more important than functional value for the buyer. Clothes’ attributes, such as protection of a body, comfort of use etc. are taken “as granted” and cannot be used to differentiate particular brand from its competitors. The relative low price tags of fast fashion (when compared with many other consumer goods, like e.g. electronics, household appliances) coincide with high social and psychological risks involved. Clothes in itself are susceptible to frequent changes in style (so called “cruise collections”) and consequently changes in consumer preferences therefore the product lifecycle of particular fashion items is extremely short. That is why fashion brands can be used as anchors stabilizing customers’ self-identity and reducing the risk of being “out-of-fashion”. The problem is exacerbated by the obvious fact of life that in a particular season majority of fast fashion retailers offer pretty much the same looking items. And, what’s more, many of them are imitations of the designers’ clothes making a case for a violation of intellectual property rights (Bruce and Daly, 2006). In such a case brands (logos) are used to differentiate between pretty much the same offers („logos are the easiest way for each designer to impart a distinguishing characteristic on what amounts to some pretty ordinary apparel”; Agins, 2000)

The fashion market in Poland has been regarded for many years as one of the most attractive in Central Europe. Yet in 2009, as a result of a worldwide crisis its value was forecasted to decrease by 6 % to 6 bln euros (Anam, 2009). The fashion market in Poland is very fragmented as top 10 companies hold altogether only 19 % of the market (the leader, LPP which is the owner of brands: Reserved, Cropp Town, Re-Kids and Esotiq has a tiny 6 % of the market; Grandys and Grandys, 2009). Polish fashion retailers are getting closer to the concept of fast fashion, identified as a market responsive to consumer demand, with closely controlled and rather local manufacturing operations, short lead times and heavily influenced by real time demand data transmitted from stores, with design based on current catwalk shows by leading designers and using mainly standard fabrics dyed to seasonal colours (Hines and Bruce, 2007). Fast fashion seem to be in fashion with Polish consumers, motivated to be in vogue. Yet still about one in every three of Poles (mainly consumers living in the countryside or small towns) when buying their clothes choose stalls in local markets and bazaars. One third of Polish consumers buy their clothes in the main street shops and one fifth prefer shops in the shopping malls (one third of city dwellers). The remaining 8% of consumers buy their clothes in the hypermarkets. And clothes are the domain of Polish women – 70 % of transactions regarding clothes come from female consumers. Young women in the largest Polish cities tend to buy their clothes pretty often – one in every four buy them a few times each month (Burska-Wojtkuńska, Kowalski … 2007).

Research question development

Regardless of fashion importance to aspiring Polish consumers, a whole one third of them cannot recall a single fashion brand. On average, the number of recalled brands is slightly above three and among leaders one will find mostly sportwear brands (Adidas, Nike, Puma, Reebok) and jeans brands (Big Star, Wrangler, Lee; Burska-Wojtkuńska, Co w szafie…, 2007). This surprising observation led authors to undertake the research subject which is the
importance of brand for female buyers behaviour in case of fast-fashion. The three-stage research process has been designed. The first was a survey - the face-to-face interviews carried out in the summer of 2008, with nearly 500 women above 15 years old, living in five large cities in different parts of Poland. The second stage was qualitative research – three focus group interviews with female fashion brand users as a participants (8 women in every interview). This research took place in May 2009. The third stage of the research was an experiment in fashion store owned by one of the most popular Polish fashion retailers. Because this experiment is crucial for answering the question comprises in the article’s title, it will be described in details in the following part of the article.

As the survey undertaken by authors showed, in case of women over 15 years old living in large cities of Poland the spontaneous brand awareness of fast-fashion brands is much higher – among most popular fast fashion brands are both foreign ones (like H&M mentioned spontaneously by nearly a third of female respondents, but also Zara and Orsay) and Polish alike (Reserved mentioned spontaneously by 42 % of respondents together with Solar, Monnari and Carry).

Half of interviewed women declare having a favourite fashion brand but only the fourth of them admit having already the brand in mind when going shopping. 15 % of respondents claimed (spontaneously) that the brand is one of the most important factors determining the choice of clothes they buy. One in every ten of women declares such a strong affiliation to the favourite brand that she is ready to forgive mistakes and deficiencies in the items she buys under that brand. When asked specifically how important the brand is, one sixth admitted “extremely important” and one third “rather important”. Brand seems to be relatively most critical factor for active, educated women under 45 years with incomes above Polish average.

When asked to explain their decision to be attached to their favourite brand, Polish women talk about the brand image that fits their self-image (25 %), brand as a risk-reducer (15 %; in group interviews women explained that the brand is responsible for tracking all the fads and fashions so the consumer may spend less time on “staying in touch” with the world of fashion; brand therefore guarantees the clothes are “in fashion”) and sparing their time (explanation offered by one in every seven respondents - otherwise they will have to compare offerings in many fashion shops). Nearly 60 % of female shoppers feel satisfied when they wear branded clothes; more then half of them feel therefore elegant, attractive and in vogue. Nearly half of women declare they feel more confident when wearing branded clothes; one in every three even feels younger, one in every five feels wealthier and one in every six more sexy than usual (fashion brands let the consumers entertain an illusion that “if they’ve changed their ‘look’, they’ve also evolved emotionally”; Tungate, 2004).

In group interviews the participants explained that shopping for branded clothes gives a feeling of fun (some women admit they feel addicted to it) and is not felt as an necessity (the whole fashion industry aims at creating needs where “in reality, there is none. Fashion is factory that manufactures desire”; Tungate, 2004). Talking about the relations between them and their fashion brands the participants used the terms like sisterhood, friendship, partnership, trust, intimacy. They unanimously admitted that after losing their beloved brand (because of its market withdrawal) they would feel lonely, sad and lost and would definitely have problems to reconnoitre.
The research questions

One could rightly assume that Polish women living in big cities are quite familiar with the concept of brand and specific fashion brands they love. Yet our suspicion is that talking about “brand” and its role in their decision-making process what Polish female consumers really have in mind is a particular store (with all its associations) and not a specific collection or style of clothes. Brand is marked on a particular fashion item with a hangtag and label. Our assumption is that during shopping in a given store women do not take notice of any changes that take place with branding of the clothes as long as they feel assured by the brand marked on a store front.

Our two hypothesis were:

[H1] Women buying clothes in a store to the brand of which they hold strong, positive attitudes, they won’t notice sub-brands added to the hangtags and labels of the clothes.

[H2] Women buying clothes in a store to the brand of which they hold strong, positive attitudes, they won’t even notice the fact that brand name and logo were removed form the hangtags and labels of the clothes.

Methodology - the experiment

The experiment took place in August 2009, in one particular store owned by one of the most popular Polish fashion retailers. In the survey taken by one of the authors, the brand was fifth in the ranking of favourite fashion brands in Poland (among 244 mentioned). It has been operating on Polish market for over 20 years. The company owns 70 stores located mainly in the shopping malls of large cities all over Poland and has a network of cooperating distributors. The value of that brand was estimated (in winter 2008) to be 10% of the most valuable Polish fashion brand, Reserved (Błaszczak, 2008).

In the first phase of the experiment the additional sub-brand had been added to the master brand used so far as the only identifier of the clothes offered in each collection sold by the retailer in question. The sub-brand had been designed to suit the colours and style of the master brand. The new logo had been applied to the hangtag and the label of selected clothes.

In the second phase of the experiment, the regular hangtag and the label had been replaced by clean (white), ornament-free and logo-free ones. The third phase of the experiment had also been planned – to introduce to the store clothes branded by one of the competitors. Alas, the owners of the company had refused to introduce such changes in their offer.

Each change lasted in the store for one day. The selected clothes had been exhibited on a display rail standing near the entrance to the store. The behaviour of women entering the store had been observed by the researchers (pretending to be the store personnel) and those of the consumers that had been noticed to inspect closely the clothes exhibited on a special display rail were asked several questions.

Forty-five women (twenty one on a first day and twenty four on a second day) aged 26 to 55 years answered the questions. Because of a small group of respondents taking part in this research and the character of this research, only descriptive statistics were used to analyze provided answers. The vast majority of participants had academic education and declared to be active in business (working full-time as white collar workers or being self-employed). Their incomes were equal or above Polish average.
All the interviewed women knew the brand in question very well. Forty one of them declared visiting other stores of the brand located in various shopping malls (one fourth admitted to shop there few times every week with majority of answers “few times a month” or “once a month”). One third of the interviewed consumers claimed to buy brand in question at least once a month and one in every six of them few times each month! Their attitude toward that brand is obviously strongly favourable. More than half of women perceive the brand to be “high quality” and one fourth perceive it to be “one of the best they know”. More than half declare the brand to be their favourite fashion brand. Strong emotional ties to the brand seem unquestionable. Interesting is the fact that those extremely favourable attitudes has not translated into strong brand loyalty - only one in every eleven interviewed women declare to be hundred-percent-loyal to the brand and the vast majority has a repertoire of two to four fashion brands among which they buy regularly.

Buying clothes for those women is not a planned action – half of them admit to buy clothes on impulse, when seeing something that “catches their eye”. Some of them buy clothes when attracted by price-offs. More then half of the women taking part in the experiment declare that brand is an important factor in buying clothes. More then two thirds of respondents claim to have strong emotional ties with brands (45 % agree strongly and 25 % somewhat).

Results: participants’ reactions to the changes introduced in the hangtag and label

Though women participating in the experiment seemed to be “brand-fluent” and well aware of the brand in question, none of them had noticed any changes in the labelling of clothes! After having pointed out to the changes that had taken place in labelling 40 % of the interviewed women (six women in case of experiment with sub-brand added and twelve in case of “no logo”) confirmed that now they could see the difference. Some women, evidently not realising the true nature of the introduced changes in the hangtag and label claimed that the colour of the logo or the colour of the label had changed (both were untrue), that one of the letters in brand’s name had changed (not true), even that label had been stitched more firmly. Some of the women could not believe that any changes had been introduced to the label and claimed that it had always looked like this (“I’ll bet my life”).

Consumers’ opinions about changes introduced in the first phase (adding sub-brand) were positive (“nice sub-brand”, “more elegant”, “at least something new”). Respondents were also pointing to the fact that sub-brands would clarify the assortment and make the process of shopping and choosing easier. But the same percentage of interviewed women would not really care about it. When changing the label to clear, white one without the standard logo of the brand, reactions were rather negative. In respondents’ opinion, the clothes looked “strange”, “like rejections”, “suspicious”, “untypical”, “unattractive”. Answering the question about their willingness to buy un-branded clothes in the branded store, one third declared they would rather not.

But at the same time, some women clarified that it really didn’t matter because they were sure what they are buying by the mere fact of entering the store of the brand known to them (“apart from the storefront nothing more matters”).
Conclusions: what kind of brand is important?

The last part of the questionnaire dealt with the problem of the type of brand taken into account during shopping for clothes – is it the brand of the store or the brand of the clothes. Majority of women (60%) participating in the experiment on a first day (sub-brand added to the master brand) declared that the brand of clothes is more important. Consequently only one respondent declared that introducing any changes might have an impact on their brand attitude and willingness to buy. On the second day (de-branded clothes) 52% of women declared that what really mattered was the store brand. But still nine out of twenty-four women declared they might change their attitude toward the clothes in reaction to introduction of de-branded offer to the store they attend. Probably such an extreme change (like using a label without any brand on it) caused the respondents to feel a bit insecure and therefore they were not ready to accept such change.

Limitations of the research

Some factors might have influenced the results of the experiment. First of all, buyers’ reactions would definitely be different in department stores and other multi-brand retailers, where by definition consumer cannot be sure about the brand of clothes she is going to buy. Therefore buyers are definitely more inclined to inspect the labels of clothes they buy. Secondly, the style of clothes and materials used by the brand in question seems to be relatively distinctive. That alone plus the awareness of the store brand might be enough to assure the buyers. Maybe in other environment (shops offering clothes with less distinctive design and style) buyers would be more inclined to inspect apparel’s labels and hangtags. Thirdly, the store where the experiment had been conducted was located in the city of Poznan, where the company in question has its headquarters. Consumers in other parts of Poland where the brand is less known and has far less shops might be more “suspicious” about the clothes offered and more ready to check the labels. Of course, the number of women taking part in the experiment was not large enough to draw unshakable conclusions. And probably most revealing would be (as we had planned but not managed to carry out) to introduce to the stores of brand X, the clothes labelled with brand Y and check how many consumers would notice that kind of alternation. Last but not least, the phenomena observed in our experiment may be specific for markets with relative short history of using brands where customers are unaccustomed to search for deeper levels of brand meaning and therefore concentrate on a risk-reducing function of the brand.

Implications

On a practical level the results of the experiment suggest different aspect of brand at successive stages of buying clothes. Because collections found in different stores at a specific point in time seem to be pretty much alike (especially in case of fast fashion) the only differentiator is the name (brand) of the store. That is the reason for outmost differentiation of store architecture, atmosphere and customer service. With those brand elements being unique it is much more probable that customer will perceive the brand (in that case – the store) as different even if clothes are not.

Brand as a tag or label attached to the apparel seem to act as a reminder of the place where particular item has been bought. The question is what is the rationale for reminding customer of the brand when after a few weeks/months of wearing a blouse, sweater or jeans they most probably are démodé. Used clothes at that moment cannot be evaluated properly as being
fashionable or not. What is more (and that comes from each group interview conducted) some women cut out the labels from clothes they wear so that they won’t scratch their skin. In that case the label cannot act as a reminder. In order to permanently signify particular fashion item its brand would have to be embroider on it (like sportswear brands do with their jackets or track suits). On the other hand, probably not every Zara aficionado would welcome the logo of the brand explicitly visible on the clothes she wears.

Acknowledging the limited importance for customers of labels sewn into clothes one should also question the use of sub-brands. If the need for signalling the distinct character of specific collections in the store seems obvious then after the purchase the role of sub-brands (some of them just indicate the segment in demographic terms, like X-kids; X-men, X-women) is questionable. Maybe the master-brand with strong and unique associations in buyers’ heads and hearts will be enough to entice them to buy. If managers were looking for ways of setting the assortment in order then assigning different parts of the store to different collections might be sufficient. Adding sub-brands to the master-brand without any strong reason is still more unnecessary when all the collections are targeted at the same customer and for the average shopper the difference between sub-brands in the same store is hard to notice.

In the end, the store is the brand and if various collections in a particular store are targeted at different market segments then additional communication with customers should enhance brand understanding. Otherwise, many sub-brands unnecessarily increase the level of “noise” encountered in the shopping environment.

Last but not least, model of apparel buying suggested by Solomon and Rabolt [Solomon and Rabolt, 2009] where the initiating factor is exposition to the fashion object (and in the next step consumer being aware of it) should be amended (see: figure 1). Our research proves that in many cases Polish buyers of fast fashion clothes are acting on impulse, while hanging around in the shopping malls. Having noticed the front and/or window of their favourite shop and after recalling previous shopping trips and satisfaction delivered by clothes of that particular brand consumer is enticed to enter the store. Only then she is exposed to the fashion items, from which she could choose (the next steps are the same as explored by Solomon and Rabolt).

Because of explicable resemblance of clothes offered by different fast fashion retailers, the brand of store is the most important differentiator of the offer. The role of such brand is to reduce the time devoted to shopping around and the risk of being “out-of-fashion”.

Figure 1

Modified model for buying fast fashion
(case of favourite brands)

CONSUMER AWARE OF STORE BRAND

RECALL OF PAST EXPERIENCES WITH THE BRAND

AWARENESS OF FASHION ITEMS IN THE STORE

INTEREST IN PARTICULAR ITEMS

EVALUATION

DECISION

SATISFACTION

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