

RESEARCH ON FAST FASHION AND FAST FASHION RETAILING IN TURKISH APPAREL SECTOR

TÜRK HAZIR GİYİM SEKTÖRÜNDE HIZLI MODA VE HIZLI MODA PERAKENDECİLİĞİ ÜZERİNE BİR İNCELEME

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ABSTRACT

Apparel sector has a significant market structure which is affected from economical developments as well as changes rapidly. Then, fast fashion is especially for the recent 10 years has increased its effect on apparel sector. It started to be evaluated as a differentiation strategy and a business model applied by firms in order to create competitive advantage. It is obviously seen that in the structural processes and retail networks of brand marks, which are adopting fast fashion, significant changes are being noticed. In our country, Turkey, there are specific brands coming out by their fast fashion strategies. In this research, four Turkish brand marks, applying fast fashion retailing strategy, are investigated. Fast fashion business models in all processes; design, product development, supply chain, information systems, store operations are looked over relatively and Turkish apparel retailing has reviewed.

Key Words: Fast fashion, Apparel sector, Retailing, Supply Chain Management.

ÖZET

Hazır giyim sektörü ekonomik gelişmelerden ve değişimlerden önemli ölçüde ve hızlı bir şekilde etkilenen bir pazar yapısına sahiptir. Hızlı moda ise özellikle son on yılda hazır giyim sektöründe etkisini gittikçe arttırmaktadır. İşletmelerin rekabet üstünlüğü yaratabilmek için başvurduğu farklılaşma stratejisi ve iş modeli olarak değerlendirilmeye başlamıştır. Hızlı moda konseptini uygulayan markaların hem yapısal süreçlerinde hem de perakende ağlarında önemli değişimler göze çapmaktadır. Ülkemizde hızlı moda stratejisini uygulayan ve öne çıkan belli başlı dört hazır giyim markaları bulunmaktadır. Bu araştırma kapsamında dört marka ile görüşülmüştür. Hızlı moda iş modelleri tüm aşamalarda; tasarım, ürün geliştirme, tedarik ağı, bilgi sistemleri, mağaza operasyonları karşılaştırmalı olarak incelenmiş ve Türk hazır giyim perakendeciliği incelenmiş ve değerlendirme yapılmıştır.

Anahtar Kelimeler: Hızlı moda, Hazır giyim sektörü, Perakendecilik, Tedarik Zinciri Yönetimi.

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1. INTRODUCTION

Fashion and apparel industries have close and impressive relation each other. A new fashion trend is considered as a strategy of the firm, adding economical value and improving competitiveness. Brands that aim to differentiate through competitors and become advantageous, should take fashion as a basic factor of their strategic business model.

Especially beginning from mid. of 20th century, development of apparel sector has gained acceleration and started globalization. In this way, together with migration of production facilities, improvement of fashion concept and firms' differentiation strategies, apparel industry has gone into a structural alteration process.

After arriving to end of 20th century, year 1990, dressing which is accepted as a necessity till that time, started to

become an industrial situation. In those years, increase of consumers' economical and educational standards, improvement communication skills and ways through societies provided awareness of people. As a result, in this competitive area apparel firms turned their ways to innovative movements in their production facilities and marketing strategies. One of the most important and radical change was increase of fashion season numbers firstly from 2 to 4 seasons, afterwards jumping to 8 seasons.

1. FAST FASHION IN APPAREL SECTOR

Today fast fashion is accepted as a fashion trend, a concept, more importantly as a strong business strategy.

In 1980 years, loss of mass production, rising of quick response systems, understanding of long and complicated

production structures' affects on costs and productivity were the main reasons of fast fashion revelation and its rapid growing movements. Transition in economical balances, improvement in societies' welfare and education levels also caused increase in dressing habits and create interest in fashion trends. Thus, a new period in fashion industry, product differentiation according to customer demands, has begun.

Fast fashion means democratization of fashion. Because fashion products are presenting in affordable prices with latest trends. Tom Ford, who has worked in Gucci as a designer for many years, says fast fashion concept democratized fashion and this helps to change understanding of fashion. It is not only a high-end customer attitude; on the contrary it can be sold in available prices and address to wider crowd of people (1).

Fast fashion targets to create "today here, tomorrow gone" perception.

Consequently, fast fashion is defined as; to provide latest fashion products to the market in affordable prices as soon as possible according to changing fashion industry and customer demands. To achieve this, it should be understood as a management strategy. Starting from design steps to in store displaying processes, supply chain and retail network circles all need to be configured by taking information and technology developments into consideration and adapting them to the system properly.

Basic elements of fast fashion can be classified as below;

- Product development and design
- Supplier determination and choice of manufacturing places
- Power of relationship between supplier and retailer
- Product displaying and management of activities in the retail store
- Coordination between head quarter and retail stores,
- Strategic importance of stores, positioning of retail stores.

2. FAST FASHION RETAILING IN TURKEY AND STRUCTURAL PROPERTIES OF FAST FASHION

In Turkey, development of apparel retail sector especially accelerated after 21st century. In those years European fashion brands begun to create competition in our market. Through information technology networks it became easier and faster for customers to learn changes and developments in the apparel sector. While customer are following new trends closer and be aware of developments in the fashion industry faster, this causes raising of expectation day by day. Of course, this reflect on firms as "what can be done to be faster and to go a step further".

In 2005 while apparel retail sector has a 22% share in all non-food retailing, in 5 years period coming to 2010, it raised the share to 27%. For year 2015, aim is to hit 33% (2).

Customers buying attitude is directly related to economical income and social welfare. In fact, under the democratization of fashion concept, target is to combine latest fashion in affordable and acceptable prices in retail stores and to encourage consumer to buy.

In fast fashion concept a new term; merchandising has risen; merchandising and became important. Merchandising is composed of three components; product series planning, developing and displaying.

Close customer relations and effective customer service have also important roles in fast fashion cycle, providing information flow. Stores are positioning as information source and it places as a bridge between headquarter and end customers.

In the supply chain management of fast fashion business structure, information systems plays a leading role to implement "fast and short period" terms. Adaptation of quick response systems and information technology is significant. Main characteristic properties aim to be created between producer and retailer in the supply chain can be listed as below;

- Collaborative relationships
- Total cost management
- Long terms agreements between suppliers
- Long term buying
- Real time (EDI)
- Reliability focus
- Strategic movement and senkronization (3).

In fast fashion cycle, quick response method is a key element factor. It can be defined as; customer focused business strategy, which target to eliminate any kind of steps or movements causing lack of productivity in the supply chain and adapting information systems and flexible production units to the system in order to position correct product in correct place in correct time. It is important to form collaboration of all partners in the chain circle (Hayes and Jones, 2006; Sheridan et al., 2006).

In production process of fast fashion, minimum inventory stock principle is preferred. Developed production technologies; computer aided design and production (CAD/CAM), flexible production systems (modular production and unit production systems) and computer aided systems, electronic data transition (EDI) systems, have also important role to create quick responsibility in the chain.

Entrance of fast fashion concept to the apparel market created quite effective changes and movements in the sector. In the world and in Turkey new fast fashion business models started to be formed and most retail brands begun to follow them as a sample model. It pushed other brands as well. At least encourage them to be aware of new developments and analyse their own structures. Retail brands who purpose to adopt this strategy in their own business model should have some certain features;

1. Planning product development-design and production processes according to point of sale datas (POS).
2. Displaying product groups, having different life cycles in the same retail store
3. Creating store atmosphere which has an influence on customers buying behaviour.
4. Positioning of retail stores as an information source center.
5. Management of supply chain according to different product concepts.
6. Applying to quick response systems
7. Applying to technology and information systems

8. Effective communication through the firm
9. Qualified staff and management in the stores of fast fashion brands.
10. Importance of stores in promotion activities.

4. MATERIAL AND METHOD

In the context of this research, it is aimed to explain how fast fashion concept is existing in our country by analysing retail brands that are standing out with their latest trends in affordable prices in Turkish apparel market.

There is a questionnaire, formed of fifty-seven questions prepared to investigate selected retail brands management and production processes deeply. In all departments; design, production, planning, buying, logistics, interviews were completed. Additionally, news, articles and any related documents from social media and web sites were overviewed and brand stores were visited and observed store atmospheres on-site.

5. RESULTS

After finalising area research on four retail brand in our country, results are evaluated under five topics.

The first retail brand, interviewed is Colin's. Today, it is connected to Eroglu Holding and stating 2009 as a changing year for brand's career. Till recent years, Colin's is perceived as a denim brand. However, by applying fast fashion to processes and concentrating on knitted products by following latest fashion especially for the five years Colin's took its place through apparel world of competitive Turkish market.

The second investigated retail brand Koton, which begun its fast fashion adaptation period earlier years compared to Colin's. In 2001, by enlarging design team, increasing product variety and adopting large scaled store principle, Koton took its first steps in fast fashion category. After passing 2005, for the coming 5 year period, it entered a fast growing action (4, 5).

The other retail brands analysed are LC Waikiki and Collezione. Regarding both brands, fast fashion movements and retail network strengthening activities accelerated in 2000.

Until 2001, LC Waikiki was increasing its retail store number average 10-20% per year. For the last 7 years this raise has come over 40% growth rate.

In regards to Collezione, the last five year period is significantly more effective, but also after 2000, changes like increased fashion seasons and structural developments in business model has started to occurred apparently.

5.1. Design and Product Development Processes

According to interviews to retail brands, it is addressed that in design processes especially for the last years, predominantly brands design and buying teams are tend to make "shopping" activities mostly. Shopping means as a term- buying fashion products by visiting stores of leading fast fashion brands from abroad. After shopping from those stores, different model, coloured and designed products are selected and taken to the headquarter. A team of designers, buyers and product managers are getting together in order to inspect shopping goods. Mostly the process goes like; new product designs are recreated from already bought models by making some adds on or making some changes on existing items. Instead of drawing inspiration and composing new design in context of model, pattern, accessories, fabric. Because the most important priority "timing" and "follow up of latest fashion on time" can be achieved by applying this shopping method.

Colin's design team is consist of 20 team members, on the other hand Koton has approximately 100 staff in design department. In LC Waikiki, again design process is hold in its own structure by giving the decisions during collection preparing process, respectively customer demands, past season datas and reference products, trends. Lastly, there are 12 staff working in Collezione's design team.

All investigated brands are evaluating suppliers' presentations and offers during design process. Even, mostly they prefer to go on with collections prepared by their suppliers. Because on suppliers' side, it would be easier and faster to implement their own designs into production process. In this way, energy and time advantages would be saved.

It is valid for all four brands that they are preparing two main seasons; winter/summer. Additionally, there are mid seasons.

In Koton, every year 20.000 different models are presented in approximately 50 prepared collections.

LC Waikiki's product launched periods are changing between 2 to 3 months for mid-season collections. For each mid-season, on average 2 or 3 different and specific small group collections are being exhibited. Totally, 15 to 20 collections are presented in stores.

In Collezione, 200 to 250 products are being designed in collections of each season. Mostly, designed products are directly accepted to production area. So actually the selection is made during design phase.

In all four brands, items named as "basic products" are take place in both winter and summer main seasons.

Table1. Business area of retail brands and distribution of product segment

	Colin's	Koton	LC Waikiki	Collezione
Established year	1983	1988	1985	1987
Business area	Apparel, Accessories	Apparel, Accessories	Apparel, Accessories	Apparel, Accessories and Cosmetics
Product segment distribution	Woman, Man	Woman, Man, Child, OLE	Woman, Man, Teen, Child, Baby	Woman, Man

Table 2. Design process of retail brands and fashion seasons

	Colin's	Koton	LC Waikiki	Collezione
Design Department Established year	1983	1995	1993	1987
Employee	20	100	*	12
Fashion seasons per year	2 main season and 3 mid season and OTB periods**	2 main season 3 mid season	2 main season 3 mid season	2 main season 4-6 mid season
Customer profile	Between 15-50 ages	Between 17-35 ages	*	Between 14-28 ages
*Info can not be received during interviews of brands.				

** Colin's denim group have open to buy budgets instead of mid-seasons. OTB is defined as opportunity. When any trend related to fashion is missed during the season, OTB budget is used to catch the trend and allow of placing an order.

5.2. Supply Chain, Relation Management and Planning of Production

While Colin's and LC Waikiki have their own production manufacturing plant, Koton and Collezione have domestic and overseas suppliers to make production process entirely.

Colin's factory is also making production for famous other foreign brands; only 20-25 % of production rate is belong to Colin's. Half and half of knitted wear production are given to domestic and overseas suppliers. Swim and beach wear products are all made in overseas suppliers.

Koton have respectively 150 suppliers in Turkey, 50 suppliers in overseas, totally working with 150 suppliers.

LC Waikiki has more than 250 suppliers including short term and long term suppliers. According to orders' size and quality, orders are placed to selected suppliers. There is not a determined rule that all orders should be placed in spesific suppliers. They prefer to work flexible, because of this, their supplier number is higher than other three brand.

LC Waikiki is managing his production by dividing the orders both to its own factory and all around suppliers; in Turkey and oversea up to orders's spesifications. It is called as Risk Division Staregy. Within this strategy, in 2011 LC Waikiki had 55% of the production made predominantly in Turkey.

In Collezione, production division is separated as 30% domestic suppliers, rest is in international suppliers. However in 2010 because of additional taxes, 25% of production is only directed to foreign suppliers, mostly in Egypt, Bangladesh, Vietnam and Fas. In Turkey, suppliers are chosen usually around Istanbul, but there are also other

suppliers locating in different regions of Anatolian. Technical personels in quality control department are checking productions in all suppliers according to brand's determined spesific quality standards firmly.

5.3. Distribution Center and Logistics Services

In logistics services four important factors are based; cost, service, quality and flexibility. Differantiations related to these matters are influencing competitive power of brands. Common criterias for determintion of distribution center are main roads, closeness to customs and head office. Furthermore it is important to choose correct ponit of dispatch in order to give the best logistics service.

Transitions of products to the stores are done through distribution center. Products are sent in packed forms to the center. However, Koton prefers to get products with hangers from domestic suppliers to the distribution center. But in foreign production, all products are received as packed parcels. After customs operations packages come to center, here are opened. First ironing and then attach to hangers before dispatching to stores.

Stocking is also applied in distribution centers. Length of stay in stocking area is changed according to orders' statute and density of distribution center. For instance; Collezione let goods in all product lines to stay as an inventory in distribution center at the most seven days.

Products in-store arriving time is on average 2-3 days length between centers to stores.

Logistics services are made by forwarder agents by sea and land routes, rarely by air freight also.

Table 3. Supplier Selection and Relations of Retail Brands

	Colin's	Koton	LC Waikiki	Collezione
Production	Own production plants + Suppliers	There is no production plant. Suppliers only.	Own production plants + Suppliers	There is no production plant. Suppliers only.
Supplier Distribution and Numbers	Suupplier location is chosen according to product division. 50% of Knitted wear nearly 100% swim and beach wear, 90% of weaved group (trousers, pants) are all produced in foreign suppliers.	Totally 150 suppliers; 100 domestic, 50 foreign.	More than 250 suppliers having long/short term business relations. 55% of production in own manufacturing plants and domestically.	Totally 75 suppliers. 25% of production in foreign supplier, rest is domestically.
Supplier Relations	Long-term business relations are preferred, however as the case may be short-term business is applied.			

Table 4. Distribution and logistics of retail brands

	Colin's	Koton	LC Waikiki	Collezione
Distribution Center	İstanbul	İstanbul	İstanbul	İstanbul
Stocking in Distribution Center	Inventory stocking till one month is allowed.	Inventory stocking is done when season sliding is concerned. Product stay time in distribution center before dispatching is 3 days for items coming domestically, 7 days items from overseas.	Inventory stocking is allowed. Time period can be flexible.	Inventory stocking till 7 days is allowed.
Logistics Services	Having contracted forward agents for both domestic and foreign transfers.	Having contracted forward agents for both domestic and foreign transfers.	In Marmara region, own logistics service is used, for other regions working with contracted forward agents.	Thru İstanbul own logistics service, for the other regions contracted forward agents.

5.4. Role of Information Systems in Retail Management Processes

Information systems play quite specific role on product input-output of distribution center and are the most important communication tools of retail stores and head offices. Actually, usage process of information systems starting from design stage, provide transfer of info through all units in correct and fast ways. E-mail services and phone calls are also used frequently between head office and retail stores. In Collezione business model, there is also a special calling system working through main server. When a call is released to a department or a person, this case is sent as a message to related person's mailbox.

Traceability is enabled through retail network in order to keep all relevant departments informed of updated info/statute changes instantly. Information update period in the system is also fundamental. For instance; Collezione updates all data (inventory, product, sales etc.) through retail network system half hourly.

5.5. Product Positioning in Retail Stores and Management of Retail Store Operations

Retail stores are playing important role as a source of information. Presentation periods of products in the retail atmosphere are shorten when product diversity and life cycle become shorter.

Products are classified as; basic and fast fashion product lines. Basic products are sent to stores preferably beginning of the season and dispatching of products continues during whole season. Afterwards, it is changing over to fashion products. Share of fast fashion products through all line in the retail store is 15-20%.

In order to maintain exhibition of fast fashion products in the store within frequently changing time periods, life cycle of those product should be shorter than basic line. On the other hand, quality of the product, being knitted or weaved is a key factor on having long or short product life cycles. Technically, production processes of knitted products could be finished faster than weaved products, especially compared to washed denim product group.

Colin's basic product line have 14 to 16 weekly life cycles, however this time period is decreased to 6 to 10 weeks for fast fashion lines depending on product quality; knitted or weaved.

Koton's fast fashion business model is composed of 2-3 days design, 3 - 4 weeks production, 1-2 days distribution. As a complete picture; from designing to in store facilities it takes 4-5 weeks.

LC Waikiki and Collezione manage to present fast fashion lines in stores by having 4-6 weekly time periods starting from design phase.

LC Waikiki's basic product category is made up of knitted and weaved product groups mainly. While in domestic suppliers, it is achieved to have averagely 8 weekly product life cycles, in weaving group category this period can be lengthen to more than 5 months especially orders placed in long-term contracted foreign suppliers.

Retail stores handling the most important advertisement role of the retail brand in fast fashion model. After making long feasibility studies on selection of store location, position of store is determined. Visual components relevant to advertisement campaigns are displayed in stores. Posting bills and visual documents of promotion activities done by celebrities are also placed in stores where it would be more attractive and take customer's attention in. For instance Koton carry out promotion activities with celebrities in Turkey like; Turkan Soray, Tuba Unsal, Baris Manco, Cuneyt Arkin and demonstrate those campaigns in different concepts; on product or in store atmosphere.

Discount time periods are organized in same terms for the brands; in winter season December-January, in summer season June-July. Except those phases, each brand can create a discount on specific product line or category at any time of year according to state of sales and product management strategies.

All investigated brands are speaking on the same stage related to online shopping facilities. Because of customer rising demands, increase in usage of internet and information technology in our lifestyle push the brands to be in social and internet platform. It is not related to gain more profit. Customer would like to see the brand in the online platform and request to reach brand at any time.

5.6. Store Operations and Sales Proportion of Retail Store and Effects of Fast Fashion Strategy

Retail brands live fast fashion strategy in their all operational stages. After displaying the product in the store, creating store atmosphere in the impacts of fashion trend and in this

way, increasing the customers shopping desire is the main purpose.

Perception in the store atmosphere effecting customers are classified in three groups; perceived perishability, perceived scarcity and perceived low price. The most dominant factor effecting on value of fashion products is price and a feeling called in-store hoarding. In-store hoarding is defined as a behaviour that involves keeping products in one's possession (in hands or in a shopping basket) during shopping in a store to prevent other shoppers from purchasing. Limited

product displaying period and limited stock numbers, in fast fashion retailing process, are the most powerful effects and properties of fast fashion retailing model in order to encourage customers desire to buy. Retailers are using this tool as a strategy to create an impression that product is offered only in limited time period and limited stock level. Accordingly, consumers carry the merchandise around store, whether they eventually purchase or not, in order to prevent the item to be chosen from other consumer.

Table 5. Information systems and communication through retail brands

	Colin's	Koton	LC Waikiki	Collezione
Information Systems.	Distribution center and head Office use common information network; WMS programme. Additionally traceability between stores is provided with a separate system tool.	head Office use common information network; Winner.	Modules of ERp and systems developed by IT team are used thorough network.	ERP and modules are used within the limits of related departments' power.
Communication Channels	Phone calls and e-mail systems	Phone calls and e-mail systems.	Special calling system, phone calls and e-mail systems.	Phone calls and e-mail systems.

Table 6. Retail brand product diversity and distribution

	Colin's	Koton	LC Waikiki	Collezione
Product dispatching frequency to stores	Every day	Every day	Every day	4 to 5 days a week
New product diversity weekly (on average)	10 products	-Season opening periods 60-80, 5-20 ürün	*	-Season opening periods 50-55
Basic products displayed in stores (%)	75% basic products	45-50% basic products	60% basic products	40% basic products
Fast fashion products in stores (%)	15-20% fast fashion products	15% fast fashion products	15% fast fashion products	30-35% fast fashion products
Product life cycles (For fast fashion products)	6-10 weeks (upon product quality)	4 weeks	4-6 weeks	4-5 weeks
Online Shopping	Until 2011 online shopping is available. Only for outlet product groups.	Until 2012 2nd quarter online shopping is available.	Until 2012 1rs quarter online shopping is available.	Until 2012 1st quarter online shopping is available.
*Info can not be received during interviews of brands.				

Table 7. Store operations and sales proportion of retail brand

	Colin's	Koton	LC Waikiki	Collezione
Store numbers 2012)	Domestic: 142 Foreign: 458 (3.rd quarter/ 2012)	Domestic:200 Foreign: 84 (3.rd quarter/ 2012)	Domestic:378 Foreign: 37	Domestic:90 (domestic:138 Distributor corner) Foreign:37 (2.nd quarter/ 2012)
Proportion of store opening level	%10	%18	*	%5-10
Sales, revenue increase, growth rate (2012)	Total revenue: 600 million dollar (3. quarter/2012) Growth rate: %50 (Like for Like method)	Total revenue: 700 million TL (net (2012) Growth rate: %30	Total revenue: 3,2 billion TL (2012) Growth rate: %20	Total revenue: 264 million TL Growth rate:*
Revenue increase rate in fast fashion products (2012)	% 5-6	%10	*	*
* Info can not be received during interviews of brands.				

6. RESULTS AND ASSESSMENTS

Fast fashion is effecting and pushing increasingly retail managements of brands to the changes of the market as a compelling power. Customer demands, competitive powers, increase of competitors in the market are the other impulsive factor to the brands. In the past, while fashion was defined as a perception addressed to spesific group, now by democratization of fashion with fast fashion concept it enables to be reached fashion in affordable prices and faster ways.

Effects of fast fahion appear clearly on the processes like; product follow-up, traceability and structuring of supply chain by strong communication and relationships, definition of roles more clearly, product management and merchandisig facilities, efficiency of information systems to production performance and retail store operations.

The role of main well-known fast fashion brands by their inceasing sales numbers and growth rates, awareness of fast fashion strategy in the world is increasingly spreading. The results are taking other retail brands attention. Those brands are beginning to follow succesful brand's business models and try to adapt the process their own brands.

However the most important point is, every retail brand should read and apply fast fashion according to their own structure.

As a result of this research, fast fashion perception and applications of fast fashion retailers can be summarized as below;

1. Effects of fast fashion movement are apparently perceived after 2005. Even after 2009, both apparel market and customer started to accept this concept faster and adapted more comfortably.
2. This movement creates an important awareness by directly or indirectly in apparel sector of fashion industry. Not only retail brands applying fast fashion strategy, but also other brands in the market started to review and evaluate their own structural properties.
3. All retail brands having interviewed are planning to set fast fashion strategy sustainable for the next 5 annual management and growing projects. They emphasized that they would focus on store operations and plannig to open new stores according to those plans. Due to store operational targets in retail network, every year on average 10-15% new stores are being opened.
4. By the effects of fast fashion concept, importance and efficiency of design departments are increased and accelarated. Besides new and original creation studies, in order to get short product life cycles, trends of leader fast fashion brands in the world are being closely followed up.
5. In the retail management systems; production line, distribution and logistics services should be managed in a well organised coordination. Information flow should be systematic and fast. Within the context of this research, all brands are benefiting from information systems; however the usage of these systems and efficiency performance could be increased. Sales data should be updated as frequent as possible in order to enable instant sales follow-up.
6. Respecting the retail stores taking an important role as a information source, store management selection has

became more fundamental tool especially fort he last five years. In the past, the requested personal and educational qualifications and properties for the store maanager and staff are different today's job interview and selection phases. Especially main retail brands are looking for textile enginners to be the manager or coordinator of the store and the team.

7. Effects of store operations are creasing in the retail circle. Store managers should report to the head office in determind time periods. They should get customer's feedbacks, evaluate sales performance, store facilities and then inform the head office. During interviews, all four brands agreed that especially for the recent years, they are paying more attention to store staffs and managers and give more responsibilities to store operations according to the brand's strategy.
8. The diversity and rate proorption of fast fashion products could be changed according to the store's position; physical size and customer profile of the area in which store located.
9. In the stores of researched four brands, fast fashion product rate is changing 15-30%. This means that fast fashion is not applied to all product groups of the brand. Because it would be really hard to control over the production and supply chain for the continual changing merchandise diversity. Also on cost side, it would not be affordable for the brand's budget. The brand need to have permanent basic product lines whose sales graphic is stable during the season and can be predictable. So fast fashion retal brands need to have at least 50-60% basic and continous product groups in their lines. The rest could be at the most 30% formed of fast fashion product group.
10. Life cycles of fast fashion products are 4-6 weeks, basic products life cycles are 3-7 months depending on product quality and supplier's location.
11. Valid for all interviewed retail brands that online shopping rate of the brands have really small amount in total revenue. However in order to provide customer satisfaction and create opportunity to the customer that they could easily reach products online whenever they ask, they all contiue to be in the online platform and giving service through virtual stores.
12. Discount and promotion campaigns are mostly directed to in store facilities and billboards. They are not used as a personel informing system. However none of the investigated brands are not set a coordinated and well-organised customer informing system for discount season informing, special day's celebrities or relevanat e-mail or message sending operations. They could work on to have a more systematic notification structure.
13. It is valid for all four retail brands that they could not place a systematic customer database and follow-up system. They could focus and work to have a well designed and easily derivable system. They could develop facilities to aim customer satisfaction and loyalty.
14. Consequently it could be understood from the research study that fast fashion concept bring a new movement to the apparel retailing sector. It is not a business model memorialized by only a spesific retail brands. It can be applied to different structural business models by realizing basicly fast fashion concept and applying it to internal process of the brand.

15. In our country there are important retail brands that are applying successfully this fast fashion movement and reflecting this application to their sales and profits. In the context of this research, it is observed that all investigated retail brands are adapting this

management strategy to their own organisational structures and business flows. It is obviously seen from their sales growths anyway.

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