

MGI

Master Degree Program in
Information Management

SLOW FASHION IN PORTUGAL: AN EXPLORATORY APPROACH

Mariana Isabel Santos Saraiva

Dissertation presented as partial requirement for obtaining the Master's degree
in Information Management, with a specialization in Marketing Intelligence

NOVA Information Management School
Instituto Superior de Estatística e Gestão de Informação

Universidade Nova de Lisboa

NOVA Information Management School
Instituto Superior de Estatística e Gestão de Informação
Universidade Nova de Lisboa

SLOW FASHION IN PORTUGAL: AN EXPLORATORY APPROACH

Mariana Isabel Santos Saraiva

Dissertation presented as partial requirement for obtaining the Master's degree in Information Management, with a specialization in Marketing Intelligence

Advisor: Teodora Szabó-Douat, Ph.D.

November 2022

Statement of Integrity

I hereby declare having conducted this academic work with integrity. I confirm that I have not used plagiarism or any form of undue use of information or falsification of results along the process leading to its elaboration. I further declare that I have fully acknowledge the Rules of Conduct and Code of Honor from the NOVA Information Management School.

Mariana Isabel Santos Saraiva

30 November 2022

Abstract

Despite being an increasingly valuable economic activity worldwide, the fashion industry is also one of the most polluting industries. Conversely, consumers are becoming more and more conscious of the environmental impacts of this industry. As such, the slow fashion concept appears as a very different vision from the traditional fast fashion models that nowadays are still taking over this industry. Considering the growing interest in this topic and the fact that Portugal is one of Europe's key players in this sector, this research aims to explore the slow fashion concept in Portugal.

One conducted exploratory research to obtain insights and knowledge about the concept from the perspective of consumers and the position of Portuguese slow fashion brands. It started with an online survey to withdraw general conclusions about the consumers' perceptions regarding the slow fashion concept and Portuguese slow fashion brands, followed by a netnography to understand the behaviour and position of the Portuguese slow fashion brands in the chosen online community: Instagram.

Keywords

Fashion Industry; Fast Fashion; Environmental Impacts; Sustainability; Slow Fashion.

Sustainable Development Goals (SGD):



Index

1. Introduction	1
2. Literature Review	4
2.1. Fast Fashion Industry	4
2.2. Sustainability in the Fashion Industry	5
2.3. Slow Fashion	5
3. Methodology.....	7
3.1. Study 1: Online Survey	7
3.1.1. Data Collection	7
3.1.2. Results	9
3.1.2.1. Statistical Analysis.	9
3.1.2.2. Sample Characterization	9
3.1.2.3. Descriptive Statistics	9
3.1.3. Discussion	14
3.2. Study 2: Netnography	15
3.2.1. Data Collection	15
3.2.2. Results	16
3.2.3. Discussion	22
4. Conclusions, Limitations and Future Research.....	23
4.1. Conclusions	23
4.2. Limitations and Future Research	23
References.....	25
Appendixes	28

List of Figures

Figure 1. Framework Model for the Slow Fashion Process.....	6
Figure 2. Word Cloud of the Most Listed Words	10
Figure 3. Logotypes of the Portuguese Fashion Brands Analysed on Instagram	16
Figure 4. Examples of Publications related with the Composition of the Product	17
Figure 5. Examples of Publications related with the Production Process	18
Figure 6. Examples of Publications related with the Production in Portugal	18
Figure 7. Examples of Publications with Tips for Taking Care of Products.....	19
Figure 8. Examples of Publications related with the Ordering Process	19
Figure 9. Examples of Publications related with Slow Fashion	20
Figure 10. Brands' Orientation according to Slow Fashion related Publications.....	21

List of Tables

Table 1. Items Selection and Adaption	8
Table 2. To what extend do you agree with the with the following statements regarding the slow fashion concept? Select two to three statements, depending on your perception of this concept. (N=630)	11
Table 3. If Yes, can you give an example? (N=151)	12
Table 4. What characteristics of brands do you associate with the slow fashion concept? Select one to three statements, according to your perception of the brands. (N=153)	13
Table 5. Themes of the Publications (N=1 949)	21
 Table A. 1. Demographic Sample Profile (N=210)	 38
Table A. 2. Have you heard of the slow fashion concept? (N=210)	38
Table A. 3. If Yes, do you have any idea of what it means? (N=82)	39
Table A. 4. Can you list three words that you associate with the slow fashion concept? (N=231)	39
Table A. 5. Do you know Portuguese fashion brands? (N=210)	39
Table A. 6. Do you associate any of these brands with the slow fashion concept? (N=151) .	39

List of Abbreviations and Acronyms

USD	United States Dollars
T&C	Textile and Clothing
GVC	Global Value Chain
GHG	Greenhouse Gas

1. Introduction

Over the last few years, the fashion industry, so often referred to as one of the world's leading economic activities, has become increasingly valuable. In 2019, the retail sales of the apparel and footwear market reached 1,9 trillion United States Dollars (USD), expected to rise to approximately 3,3 trillion USD by 2030 (Global Fashion Agenda & Boston Consulting Group & Sustainable Apparel Coalition, 2019).

In Portugal, the Textile and Clothing (T&C) industry is one of the most important industries of the Portuguese economy. In 2018, this sector represented 19 percent of employment and 8 percent of the turnover of the manufacturing industry. Moreover, Portugal is also considered one of the key players in Europe. In 2018, Portugal ranked fourth in terms of employment and sixth in terms of turnover of the manufacturing industry compared to other countries in the European market (Associação Têxtil e Vestuário de Portugal, 2019).

However, the fashion industry worldwide has seen better days. With the coronavirus pandemic challenging the global economy in 2020, the fashion industry had the worst year documented (The Business of Fashion & McKinsey&Company, 2021). Indeed, this industry reported a negative economic profit in 2020, declining 133 percentage points compared to 2019 (The Business of Fashion & McKinsey&Company, 2022).

Nevertheless, the coronavirus pandemic has not only transformed the industry but has also changed consumer behaviour. Consumers are now more critical of consumerism and more concerned about environmental impacts; over the last few years, individuals have become more conscious about sustainability (The Business of Fashion & McKinsey&Company, 2021).

But let us take a step back. Environmental issues are not new. With the fashion industry currently dominated by fast fashion models as a strategy, designed to be rapidly mass-produced, effortlessly and cheaper, the environmental impacts have become an evident concern, hard to ignore (Fletcher, 2010; Gunner, 2019).

Before the coronavirus pandemic, the Global Fashion Agenda & Boston Consulting Group & Sustainable Apparel Coalition (2019) indicated that the fashion industry needed a more in-depth and systemic change in the Pulse of the Fashion Industry report. In this report, the authors have also anticipated a shift in consumer behaviour, stating that consumers increasingly consider environmental issues while making purchasing decisions. Besides, the same authors have also argued that consumer awareness is not enough to lead an industry-wide change and, therefore, fashion leaders are the ones who should assume primary responsibility for the sustainable transition (Global Fashion Agenda & Boston Consulting Group & Sustainable Apparel Coalition, 2019).

Slow fashion emerged to affirm the importance of fashion to culture and the urgency of the sustainability agenda. It combines ideas about a sense of nature and culture time as the more common timeframes of fashion and commerce (Fletcher, 2008).

While exploring this concept, many authors have sought to focus on consumers: identifying slow fashion consumer segments and understanding their characteristics (Jung & Jin, 2016a); understanding the self-concept to explain consumer behavioural intentions towards slow fashion (Legere & Kang, 2020); and, on the effect of the consumer's decision-making process towards slow fashion (Ionela-Andreea, 2021). However, there is no formal definition for slow fashion (Zarley Watson & Yan, 2013), and the lack of a concept is problematic and limiting, considering the growing interest in this topic (Jung & Jin, 2014).

Therefore, this dissertation presents two main distinctive goals: to explore consumer perception of the slow fashion concept in Portugal and to scrutinise the online behaviour of the Portuguese brands that consider themselves slow fashion brands.

As a result, a set of research questions arise. Firstly, how are the slow fashion concept and slow fashion brands perceived in Portugal? In particular, the objectives of the first study were to understand consumers' knowledge regarding slow fashion; to understand their perceptions considering the existing literature; to establish a relationship between this concept and Portuguese fashion brands, and discover which characteristics are commonly associated with these brands.

Secondly, are there any Portuguese slow fashion brands? How do these brands behave and position themselves online? Specifically, the objectives of the second study were to identify Portuguese slow fashion brands, classify their online publications according to the topics covered, and establish a relationship between the types of publications and the positioning of the slow fashion brands on Instagram.

From a practical point of view, after showing the importance of this industry, both domestically and internationally, and the increasing importance of sustainability in the fashion industry, this study will be crucial to investigate the concept and the scope of the slow fashion concept, in this case, in the Portuguese market.

From the academic point of view, as already shown, the importance of this subject has motivated the development of many studies; despite that, the attention received over the last decades by slow fashion is scarce compared to other preceding concepts, such as fast fashion models. As such, the present study contributes to the existing knowledge on a subject not much explored but extremely actual and relevant.

The dissertation is structured in four sections, as follows. Section 1 presents an overview of the topic of study, identifying its academic and business relevance. Section 2 reviews the existing literature about the subjects of interest of this research. Section 3 sets out the methodology, defines the conducted studies, explains the data collection, and presents both results and a brief discussion of each study. Last but not least, Section 4 provides the conclusions of this research, the limitations, and directions for future research.

2. Literature Review

Accordingly to Barnard (2020), fashion could be defined as one of the crowning achievements of Western civilization, as much as a demonstration of consumer culture's witless obsession with the trivial and the unreal. It can be creative, “enabling individuals and cultures to express their inner feelings and personalities”, or it can be exploitative, “forcing people to work and spend more than is healthy for them or society” (Barnard, 2020).

2.1. Fast Fashion Industry

At the turn of the century, the appearance of the industry players known as “fast fashion retailers” and its explosive expansion brought some fresh air to the textile and clothing industries and quickly won consumer approval (Caro & Martínez-de-Albéniz, 2015). Brands such as Zara, owned by the Inditex group from Spain, and Hennes and Mauritz (H&M) from Sweden, have established themselves and have become among the most recognized brands worldwide today (Interbrand, 2021).

Many fashion companies adopting fast fashion as a strategy aimed to increase sales and growth by maximizing economies of scale and minimizing costs. In this way, brands can mass-produce, distribute and sell in ever-increasing quantities at reduced prices and smoothly bring new products to the market (Fletcher, 2010).

With very efficient supply chains, fast fashion models can respond quickly to emerging fashion trends, allowing a broad range of consumers to access affordable garments, either inspired by or copied from the most exclusive and expensive designers, democratizing access to fashion (Brewer, 2019; Zarley Watson & Yan, 2013).

Generally, retailers who adopt this business model are ready to deliver merchandise to their stores with a lead time of about one month, launching a new 'collection' every week, introducing around 120 products on average (Caro & Martínez-de-Albéniz, 2015; Stanton, 2021; Zarley Watson & Yan, 2013).

2.2. Sustainability in the Fashion Industry

However, it's not all roses. With the global fashion industry recognized as one of the leading industries having a more negative impact on the environment, the growth of the fast fashion business models was considered the main driver (Pal & Gander, 2018).

The T&C industry has one of the most complex Global Value Chains (GVC) compared to others, with most products often being manufactured in countries with lower environmental standards. Furthermore, the diversity of activities required for the production makes it difficult to estimate the impacts of its consumption, as there are costs to the environment associated with each stage of the production process. From raw material production, processing and garment production, transportation and distribution, and consumer use to end of life, the costs to the environment are countless (European Parliamentary Research Service, 2019). From the number of resources consumed to the toxic chemicals used, not to forget the Greenhouse Gas (GHG) it emits, the water pollution, and the textile waste it generates... Those are just a few examples of some of the negative consequences of the massive production of this industry (European Parliament, 2021; Fletcher, 2010; Gunner, 2019).

Because of all that, the European Environmental Agency has even ranked the clothing, textile, and footwear industry as the fourth-highest pressure category for using primary raw materials and water, the second-highest for land use, and the fifth-highest for GHG emissions (European Environmental Agency, 2019).

If there are no additional measures beyond those already in place, the industry's GHG emissions will rise to around 2,7 billion tonnes a year by 2030, a variation of another 30 percent compared to 2018 (McKinsey&Company & Global Fashion Agenda, 2020).

2.3. Slow Fashion

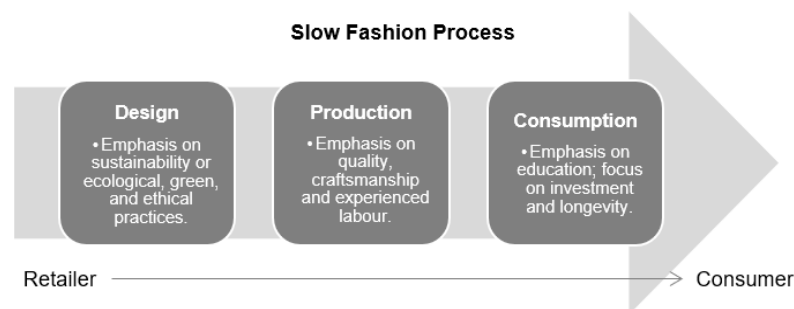
With environmental sustainability issues becoming increasingly important in the fashion industry, a sustainable movement has recently emerged, slow fashion. It came as a new vision for the fashion industry introduced in the era of sustainability.

Slow fashion is not the opposite of fast fashion, but a different approach in the fashion industry “in which designers, buyers, retailers and consumers are more aware of the impacts of products on workers, communities and ecosystems” (Fletcher, 2008).

Slow design, production and consumption ideas were first associated with the slow food movement. Founded by Carlo Petrini in Italy in 1986, this movement was a reaction to the increasing presence of fast-food restaurants in that industry, linking pleasure and food with a commitment to the community and the environment (Fletcher, 2008; Jung & Jin, 2014).

A few years later, other authors argued that the greater the knowledge about slow fashion, the clearer became that slow fashion is not an antithesis of fast fashion. It is instead a complete process of conscious decisions needed at all industry levels, from retailers to consumers (Figure 1) (Pookulangara & Shephard, 2013).

Figure 1. Framework Model for the Slow Fashion Process



Even later, against the initial concept, some other authors present the slow fashion concept as the antithesis of fast fashion (Jung & Jin, 2014). It emphasizes quality and appeals to a more conscious awareness from producers and consumers while slowing down the cycle of production and consumption. It requires that producers are more aware of the environmental and social impacts of the manufactured products, and consumers are encouraged to buy less in quantity and higher in quality to delay both the production and consumption cycle (Jung & Jin, 2016b).

3. Methodology

This dissertation used both secondary and primary data. Primary data collection became essential to complete the information collected through secondary data and included the studies below: an online survey and a netnography.

In terms of research design, one broadly classified this as exploratory; since do not exist enough knowledge about the slow fashion concept in Portugal, the goal is to provide valuable insights from the perspective of consumers and the positioning of brands.

3.1. Study 1: Online Survey

3.1.1. Data Collection

One had developed and made available the survey through Qualtrics Online Software, collecting the data between the 18 and 27th of April 2022.

The survey was available in both Portuguese and English. Considering the purpose of this research - to understand the slow fashion concept in Portugal - it was essential to address the questions in Portuguese, the native language of most respondents, diminishing misunderstandings and increasing the response rate. Besides that, it included an English version, so foreigners living in Portugal could also answer the survey.

Snowball sampling was the sampling technique used, sharing the survey with an initial group of participants who shared it with their contacts (Nunan et al., 2020).

Were not found incomplete surveys since the system has not considered them. Besides, each question was established as mandatory so that there were no surveys with missing information. Additionally, each response was subject to verification to ensure that all the surveys were complete and eligible. In the end, were collected 210 valid answers.

The survey was divided into sections to facilitate progress through the questions (Online Survey - Appendix A and B). In the beginning, it had a small introduction explaining the purpose of the research and requesting respondents' consent to participate.

In the first section, there were a few simple questions to understand respondents' knowledge regarding slow fashion.

The second section introduced to the respondents some considerations based on the literature about the slow fashion concept to understand their beliefs and perceptions of this topic. Table 1 summarizes the scales and their sources.

The third section attempts for respondents to establish a relation between this concept and identify Portuguese fashion brands compatible with their views on the slow fashion concept, assuming they know these brands.

Last but not least, demographic data was obtained, such as gender, age, level of education, nationality, and place of residence.

Table 1. Items Selection and Adaption

Constructs	Items	Sources
Sustainable/ Sustainability	Slow fashion is related to environmental sustainability. Slow fashion is limited to environmental sustainability.	Jung & Jin, 2014
Awareness/ Consciousness	Slow fashion is related to pleasure and fashion. Slow fashion is associated with awareness. Slow fashion is associated with responsibility.	Fletcher, 2007, 2008
Quality	Slow fashion emphasizes quality over quantity. Slow fashion emphasizes the quality of the environment. Slow fashion emphasizes the quality of society. Slow fashion emphasizes the quality of working conditions. Slow fashion emphasizes the quality of business. Slow fashion emphasizes the quality of products.	Fletcher, 2008
Antithesis to Fast Fashion	Slow fashion is the opposite of fast fashion. Slow fashion is a movement against waste. Slow fashion is a movement against fast-tracking trends. Slow fashion is a movement against following trends with minimum quality.	Jung & Jin, 2014
Slow Fashion Process	Slow fashion is a more conscious design decision process. Slow fashion is a more conscious decision-making process at the production level. Slow fashion is a more conscious decision-making process in terms of consumption. Slow fashion is a more conscious decision-making process made by retailers. Slow fashion is a process of more conscious decisions made by consumers.	Pookulangara & Shephard, 2013

3.1.2. Results

3.1.2.1. Statistical Analysis.

Descriptive statistics conduction relied on Microsoft Excel to analyse the general results, absolute and relative frequencies, means and standard deviations.

3.1.2.2. Sample Characterization

The sample consists of 210 individuals aged between 19 and 59 ($M=32,31$; $SD=8,99$). Concerning gender, most of the respondents were women (67,62%), twice as many as men (31,43%). Regarding academic qualifications, the respondents were highly educated; the majority had a bachelor's degree (37,62%), a post-graduation (10,00%) or a master's degree (30,00%) as the completed level of education. Concerning respondents' nationality and place of residence, most respondents were Portuguese (81,43%) or were living in Portugal (87,62%). In Table A. 1 - Appendix C - the demographic sample profiles.

3.1.2.3. Descriptive Statistics

As previously explained, in the first section of the survey, the questions aimed to understand the respondent's knowledge about slow fashion.

Of the total of the respondents ($N=210$), the majority (60,95%) had never heard about the concept, and the remaining revealed that the slow fashion concept was not unfamiliar to them (39,05%) (Table A. 2 - Appendix C).

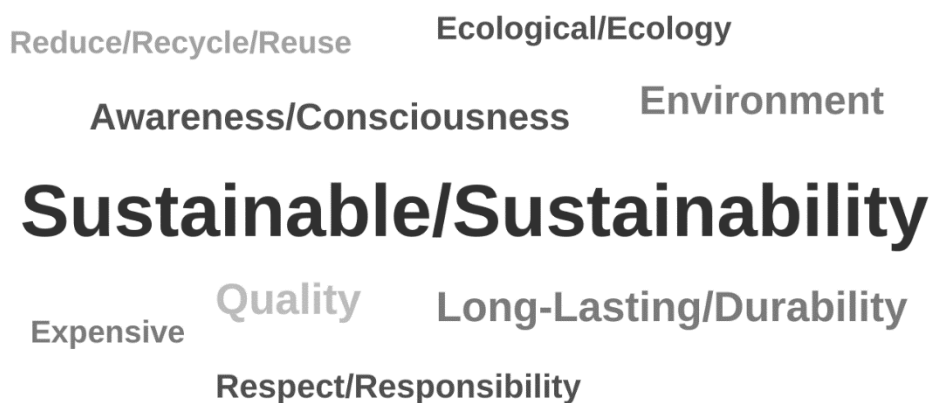
After that, among those respondents who answered 'Yes' to the previous question ($N=82$), the majority stated knowing the meaning of slow fashion (41,49%), having an idea (29,27%) or knowing more or less the concept (23,17%). A few respondents had no idea of the concept (3,66%) or did not know what it meant (2,44%) (Table A. 3 - Appendix C).

Next, attempting to understand the respondents' ideas regarding the topic of study, those who had positively answered the previous question ($N=77$) were asked to list some words that they associate with the slow fashion concept. Each respondent could write three words, resulting in a total of 231 possible answers/words ($N=231$).

However, it was only mandatory to write one word to move forward in the survey.

Generally, the most commonly mentioned word associated with the slow fashion concept was sustainable/sustainability (21,65%). It was followed then by quality (8,23%) and long-lasting/durability (7,79%). Also mentioned very often were environment (6,93%) and awareness/consciousness (5,63%). Not so often referred to, but still worth noting, were words like respect/responsibility (3,90%), ecological/ecology (3,49%), expensive (3,03%) and reduce/reuse/recycle (3,03%). Besides this, participants mentioned Other Words, a total of 51 different words that were not repeated so often (34,63%). Respondents also left a few blank spaces with No Answer (1,73%) (Table A. 4 - Appendix C).

Figure 2. Word Cloud of the Most Listed Words



In the second section of the study, respondents only had to answer one question.

As explained above, all participants were randomly presented (N=210) with several considerations based on the existent literature about the slow fashion concept, asking them to choose which ones made the most sense to them. Each respondent could choose two to three statements, resulting in a maximum of 630 possible answers/choices (N=630). However, it only required the selection of two options to proceed with the survey.

Again, the results revealed that people mostly associate the slow fashion concept with sustainability (13,49%), considering it mainly as a more conscious decision process of consumption (8,10%). Many respondents have considered slow fashion as the opposite of fast fashion (7,94%) and a movement against waste (7,62%) that emphasises quality over quantity (6,98%). Of the remaining options, Other Statements were selected but not as often (15,87%), and some people did not choose all three options, so there are some missing answers (3,65%). In Table 2, could be found the respondents' choices.

Table 2. To what extent do you agree with the with the following statements regarding the slow fashion concept? Select two to three statements, depending on your perception of this concept. (N=630)

	Frequency (N)	Percentage (%)
Slow fashion is related to environmental sustainability.	85	13,49%
Slow fashion is a more conscious decision-making process in terms of consumption.	51	8,10%
Slow fashion is the opposite of fast fashion.	50	7,94%
Slow fashion is a movement against waste.	48	7,62%
Slow fashion emphasizes quality over quantity.	44	6,98%
Slow fashion is a more conscious decision-making process at the production level.	41	6,51%
Slow fashion is a movement against fast-tracking trends.	36	5,71%
Slow fashion is associated with awareness.	35	5,56%
Slow fashion is a process of more conscious decisions made by consumers.	34	5,40%
Slow fashion is associated with responsibility.	33	5,24%
Slow fashion is a concept associated with circular economy trends.	31	4,92%
Slow fashion emphasizes the quality of products.	19	3,02%
Other Statements*	100	15,87%
No Answer	23	3,65%

*Other Statements, include: Slow fashion emphasizes the quality of working conditions. (2,86%), Slow fashion is a more conscious decision-making process made by retailers. (2,86%), Slow fashion is a movement against following trends with minimal quality. (2,06%), Slow fashion is a concept associated with second-hand shopping, for example. (1,75%), Slow fashion is related to pleasure and fashion. (1,75%), Slow fashion emphasizes the quality of the environment. (1,43%), Slow fashion is limited to environmental sustainability. (1,11%), Slow fashion emphasizes the quality of business. (0,95%), Slow fashion is a more conscious design decision process. (0,79%), Slow fashion emphasizes the quality of society. (0,32%).

The third section sought to understand if respondents knew Portuguese fashion brands and if they could establish any relationship between them and the slow fashion concept.

It started with a question of whether or not people (N=210) knew Portuguese fashion brands. Most people admitted to knowing Portuguese fashion brands (71,90%), but some revealed not knowing any brands (28,90%) (Table A. 5 – Appendix C).

Despite this, of those respondents who positively answered the previous question (N=151), more or fewer two-thirds (66,23%) admitted not associating their known Portuguese fashion brands with the slow fashion concept. About a third (33,77%) admitted to associating with them. (Table A. 6 – Appendix C).

Afterwards, those respondents who associated Portuguese fashion brands with this concept gave some Portuguese fashion brand examples (N=51). It was an open-ended question, and many presented more than one example of a brand they associated with the slow fashion concept. Were collected the answers of 51 respondents; one individual did not reply, but the others listed 61 brands (N=62). In Table 3, there are the listed brands.

Table 3. If Yes, can you give an example? (N=151)

	Frequency (N)	Percentage (%)
ISTO.	6	9,68%
CAPTAIN TOM	4	6,45%
NÄZ	4	6,45%
MAHRLA	3	4,84%
THE ALMOND	3	4,84%
CONSCIOUS	2	3,23%
OH MONDAY	2	3,23%
SALSA	2	3,23%
SHIRTLIS	2	3,23%
SIENNA	2	3,23%
Other Brands*	31	50,00%
No Answer	1	1,61%

*Other Brands, include: 8000KICKS (1,61%), ATELIER FUSION (1,61%), BASEVILLE (1,61%), BENEDITA FORMOSINHO (1,61%), BENETTON (1,61%), BUZINA (1,61%), CANTÊ (1,61%), CATA VASSALO (1,61%), ECOX (1,61%), EU.TELA (1,61%), H&M (1,61%), HEY LÁ CARAPAU (1,61%), IMAGO (1,61%), IMMA (1,61%), JAR PROJECT (1,61%), KAOÂ (1,61%), LAMAREL (1,61%), LEVI'S (1,61%), MAIZENA (1,61%), MARITA MORENO (1,61%), MONTE CAMPO (1,61%), N (1,61%), OTHERWISE (1,61%), QUEBRAMAR (1,61%), R-COAT (1,61%), SANJO (1,61%), SEM HÍFEN (1,61%),SKIZO (1,61%), TEMA CREATIONS (1,61%), VISSI (1,61%), WONTER (1,61%).

Lastly, those who associate Portuguese fashion brands with this concept (N=51) answered about the characteristics of such brands that can relate to the slow fashion concept. Each respondent had to select one to three statements, resulting in 153 possible answers/choices (N=153). It required the selection of one to complete the survey.

The brand characteristics that people most associated with the slow fashion concept were the effort to reduce the environmental impact in the production of their pieces (14,38%) and sustainability (12,42%). Moreover, respondents also considered brands as conscious (8,50%) with an emphasis on quality (8,50%) by producing in small quantities (7,84%). Participants also perceived these brands as responsible (7,19%) for complying with ethical principles of respect for the community (6,54%) and believed that these brands produce timeless pieces (6,54%) but tend to be more expensive (5,88%). In Table 4, the characteristics of the Portuguese fashion brands associated with the slow fashion concept.

Table 4. What characteristics of brands do you associate with the slow fashion concept? Select one to three statements, according to your perception of the brands. (N=153)

	Frequency (N)	Percentage (%)
These are brands that aim to reduce the environmental impact in the production of their pieces.	22	14,38%
These are sustainable brands.	19	12,42%
These are brands that emphasize quality.	13	8,50%
These are conscious brands.	13	8,50%
These are brands that produce in smaller quantities.	12	7,84%
These are responsible brands.	11	7,19%
These are brands with timeless pieces.	10	6,54%
These are brands that aim to comply with ethical principles of respect for the community.	10	6,54%
These are more expensive brands.	9	5,88%
Other Statements*	34	20,92%
No Answer	2	1,31%

*Other Statements, include: These are brands that emphasize fair trade. (4,58%), These are brands with pieces made with more ecological materials. (4,58%), These are brands produced in Portugal. (3,92%), These are brands with high quality pieces. (3,92%), These are transparent brands. (2,61%), These are brands with exclusive pieces. (1,31%).

3.1.3. Discussion

In light of the online survey results, this study seems to indicate that the concept of slow fashion is unknown to most respondents. However, those familiar with or with some thoughts about slow fashion associate it with sustainability and environmental aspects, which can be explained somehow by the increasing concerns of consumers on sustainability (The Business of Fashion & McKinsey&Company, 2021).

Nevertheless, even with these concerns in mind, a recent study demonstrates that most consumers are unwilling to pay more for environmentally friendly options (Bennetta & Oeppen Hill, 2022), which could also apply to slow fashion brands' products. In addition, even with less quantitative relevance, those familiar with the concept or with some ideas also relate the slow fashion with higher quality standards and higher long-lasting/durability.

Later, respondents who knew Portuguese fashion brands and perceived them as slow fashion brands also associated them with those same characteristics. Yet, since the definition of slow fashion is controversial and not-uniform, as progress on this concept is also very slow (Mizrachi & Tal, 2022), these characteristics may not be enough to qualify all the Portuguese fashion brands identified by the respondents as slow fashion.

3.2. Study 2: Netnography

Netnography was the second marketing research technique used in this study. Netnography is a qualitative method defined as an adaptation of ethnography based on individual behaviour in online environments (Kozinets, 2002). Compared to the other qualitative methods, the singular value of netnography is seen as less time-consuming and elaborated than the traditional ethnography technique. It is less obtrusive, costly and timely than focus groups or personal interviews (Kozinets, 2002).

3.2.1. Data Collection

It followed Kozinets' (2002) netnography procedure as a reference, adapting it to the fashion context. In the first stage, we identified the communities most relevant to study the slow fashion concept. It went on to select publications posted on Instagram, one of the world's most-used social platforms (Kemp, 2021), from Portuguese fashion brands.

In the second stage, the study proceeded with brand identification and selection. In January 2022 we catalogued the brands present at the Fall Market Stylista 2021 - a market of brands mainly produced in Portugal that intends to act "as an incubator for start-ups and effectively presents the highest concentration of national talent per square meter". Of the brands at the event, we have registered almost 60 Portuguese fashion brands with an online presence on Instagram benefited from a high number of followers and a large number of publications (List of Portuguese Fashion Brands - Appendix D). In addition, in July 2022 we analysed the Portuguese fashion brands mentioned by the respondents in the previous study - the online survey - but weren't found other slow fashion brands.

A preliminary analysis was then carried out through the Portuguese fashion brands 'Descriptions' on the chosen social network, Instagram, and several keywords founded - some similar to each other - such as contemporary, conscious, ethical, made in Portugal, responsible, slow fashion, and sustainable, amongst others. The focus was on the Portuguese fashion brands that described themselves as slow fashion, considering a detailed analysis of seven Portuguese fashion brands (Figure 3).

Figure 3. Logotypes of the Portuguese Fashion Brands Analysed on Instagram



After that, the third phase consisted of observing the behaviour of the brands mentioned above in the chosen community, Instagram, and gathering the data. A preliminary analysis started on miro.com and then proceeded with a deeper analysis.

Data was collected for up to one year of publications, from July 2021 until June 2022, observing 1.949 publications on the selected brands' Instagram accounts. One looked at each of the photos and videos published, read the descriptions and comments, tried to understand the positioning of the brands, and, at the same time, classified each publication individually, according to the topic covered, to identify those most related to slow fashion.

The fourth phase followed the interpretation and generation of insights through the grouping of behavioural patterns and identification of the main characteristics of each brand.

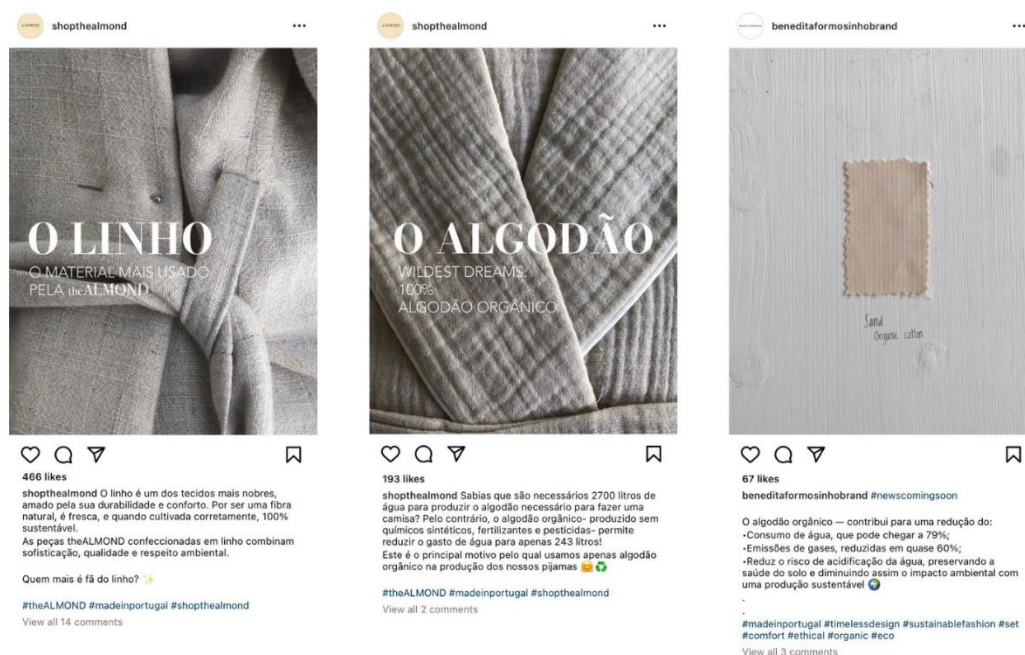
3.2.2. Results

So that one could analyse the sample, it has developed throughout the analysis a dictionary of categories based on the topics approached in each publication of the brands. Many themes were found in the total of publications observed, and posts were grouped according to those categories, selecting the ones that seemed related to slow fashion.

Of the most relatable topics found publications about the composition of the products, the production process, the production in Portugal, the ordering process, the slow fashion concept, and posts with tips for taking care of the products. Lastly, it was established a category with all the other topics of the publications. All the covered topics are explained below, and a resume of them can be found at the end, in the Table 8.

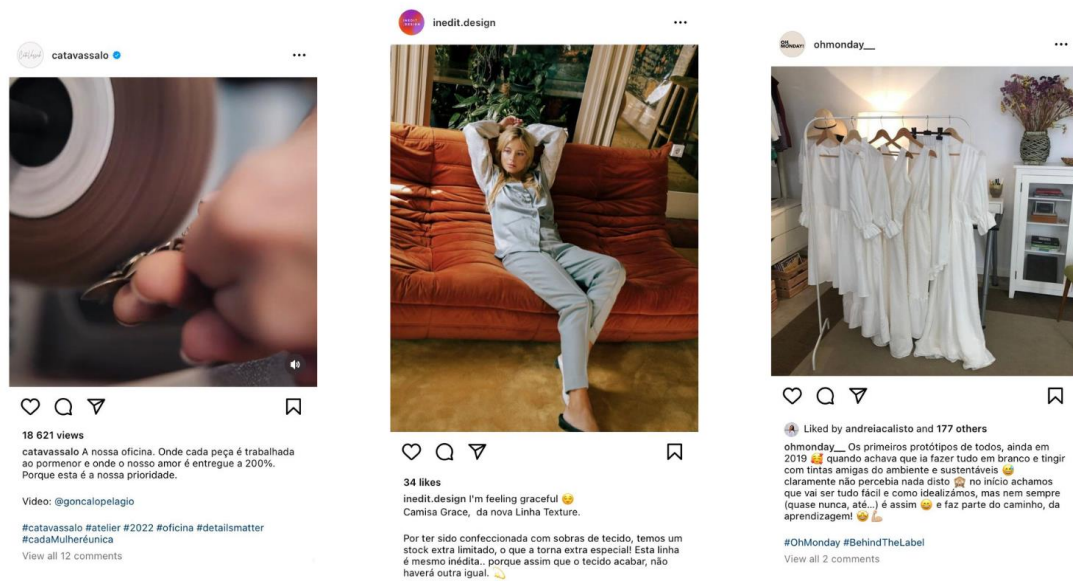
Composition of the Product - Publications concerning the product's composition include explanations about the textile fibres that compose the garment. Usually, brands explain which characteristics make these materials more advantageous for the environment, demonstrating the added value of their products. For instance, "Linen is one of the noblest fabrics, loved for its durability and comfort. As it is a natural fibre, it is fresh and, when grown correctly, 100% sustainable." (Figure 4).

Figure 4. Examples of Publications related with the Composition of the Product



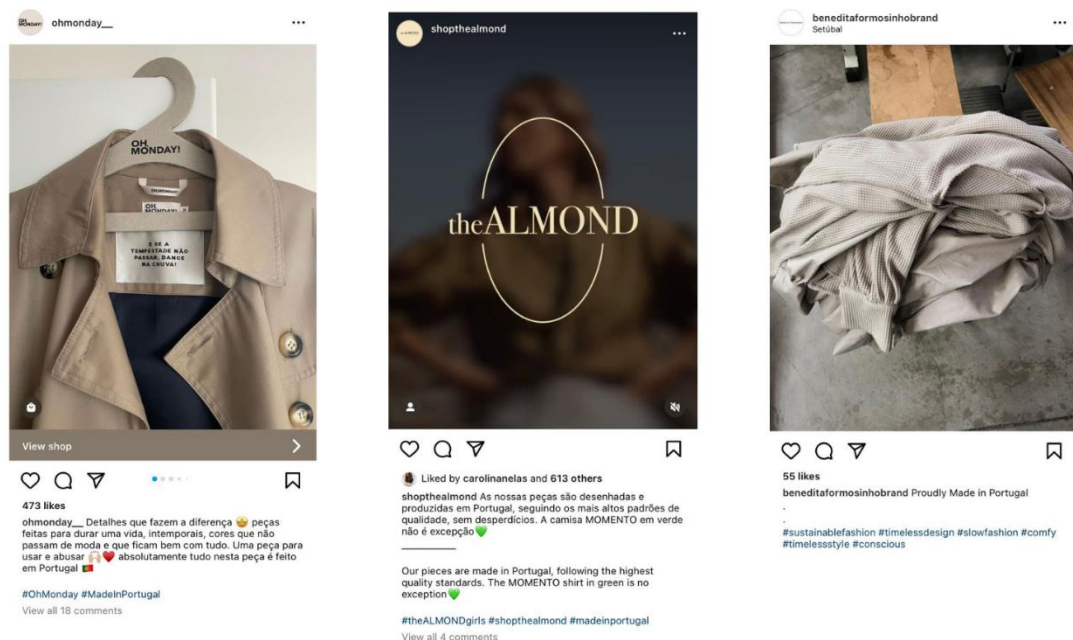
Production Process - Publications related to the stages of the production process of each brand's products, from the sketch of the product to the outcome purchased by the consumer. For example, "Our workshop. Where each piece is crafted to detail and where our love is delivered 200%. Because this is our priority." (Figure 5).

Figure 5. Examples of Publications related with the Production Process



Production in Portugal - Publications that aim to emphasise national production. For instance, "(...) absolutely everything in this piece is made in Portugal." (Figure 6).

Figure 6. Examples of Publications related with the Production in Portugal



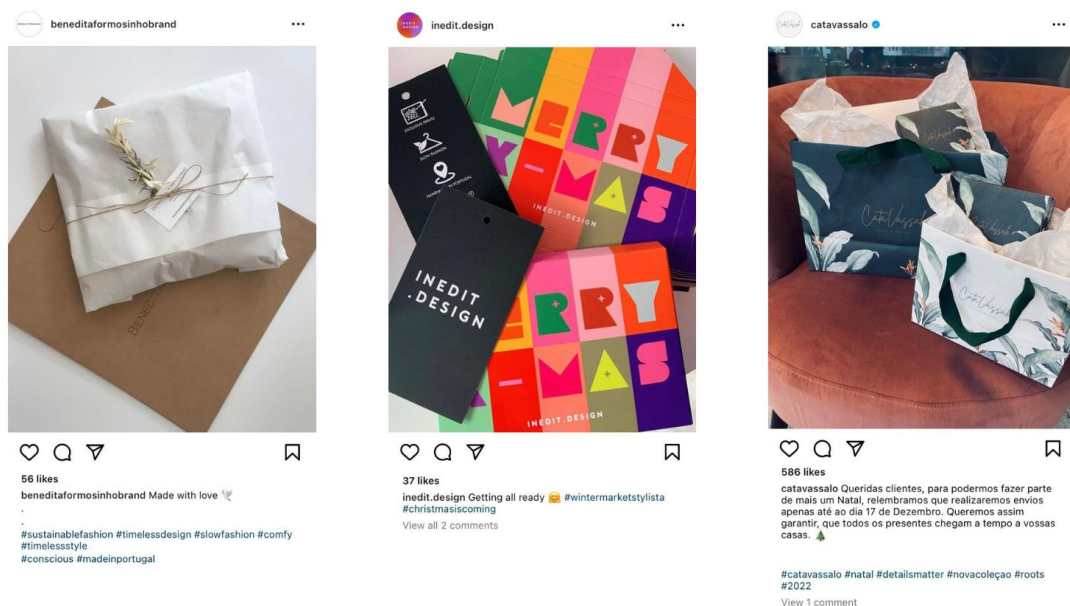
Tips for Taking Care of Products - Publications with tips on how to care for your clothes, so that it lasts longer and keeps its quality. "(...) In this post we have prepared 8 tips for you to wear your clothes for a long time! (...)" (Figure 7).

Figure 7. Examples of Publications with Tips for Taking Care of Products



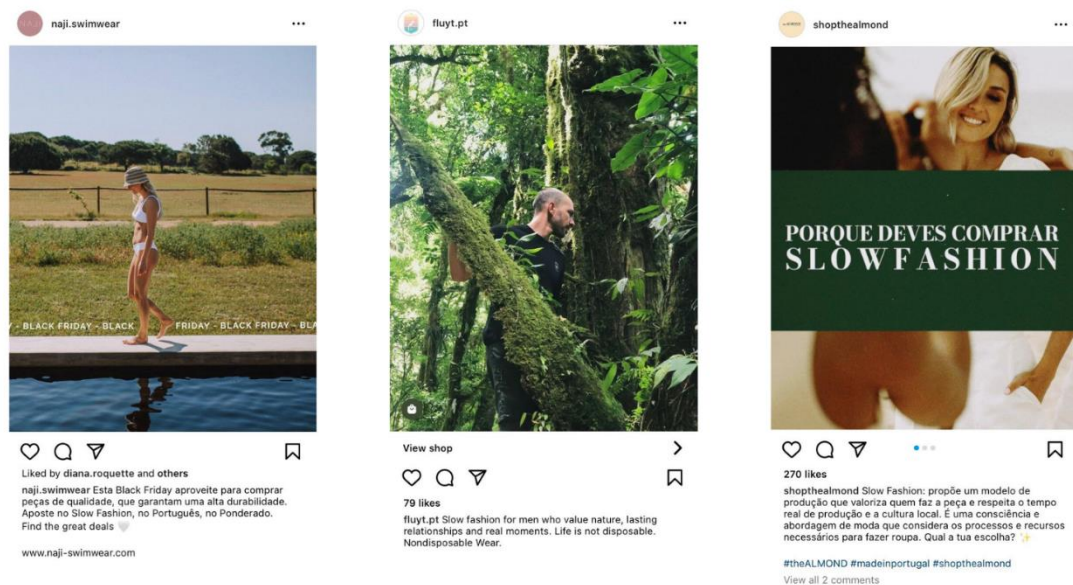
Ordering Process - Publications similar to the production process ones, in this case, in which brands show the detailed preparation of each order to be sent to the customer, presenting all the details of packaging, differences that made it environmentally sustainable, and what makes each client and order special. For example, "Made with love." (Figure 8).

Figure 8. Examples of Publications related with the Ordering Process



Slow Fashion - Publications to introduce to the consumers the concept of slow fashion, explaining the production model, the benefits and some facts associated with slow fashion. For instance, “Slow Fashion: it proposes a production model that values who makes the garment and respects the actual time of production and the local culture. It is an awareness and approach to fashion that considers both the processes and resources needed to produce clothes. What is your choice?” (Figure 9).

Figure 9. Examples of Publications related with Slow Fashion



Others - Within this topic are included all the other Instagram publications with diverse content analysed and considered unrelated to the slow fashion concept. Some examples were publications referring exclusively to the products, others inspirational, posts related to the presence of the brands' products in physical shops, publications with special offers, and new products or collection releases. In addition, publications about the brands or the projects, the restocking of products, about how to use the items, the partnerships, the press, and the consumer's feedback. others.

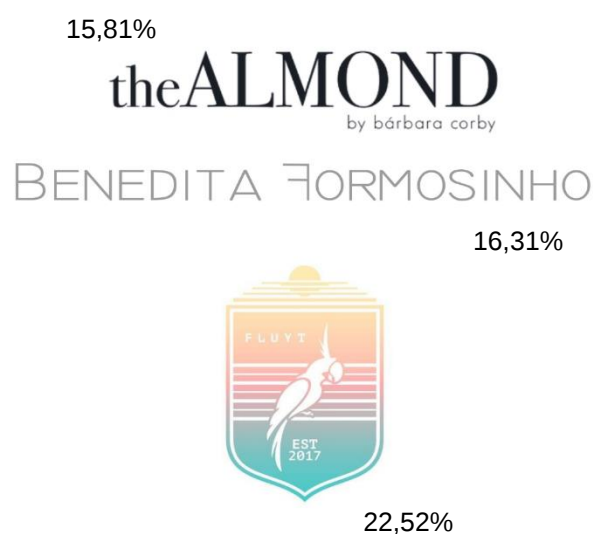
Table 5. Themes of the Publications (N=1 949)

	Frequency (N)	Percentage (%)
Composition of the Product	104	5,34%
Production Process	41	2,10%
Production in Portugal	11	0,56%
Tips for Taking Care of Products	9	0,46%
Ordering Process	8	0,41%
Slow Fashion	7	0,36%
Others*	1.769	90,76%

*Other, include: Others - Products (49,46%), Others - Inspirational (26,68%), Others - Physical Store (4,21%), Others - Special Offer (3,64%), Others - Brand/Project (3,54%), Others - Restock of Products (1,54%), Others - How to Wear (0,77%), Others - Partnerships (0,72%), Others - Press (0,15%), Others - Consumer Feedback (0,05%).

Lastly, was undertaken an additional analysis to understand the proportion of slow fashion-related publications over the total number of publications of each brand on their respective Instagram accounts for the period mentioned above.

Below, we classify the brands with a percentage of publications directed towards these themes as having a stronger orientation towards slow fashion, with more than 15 percent of the total publications, and less-oriented brands, with a proportion of less than 7,50 percent. Apart from this categorization, all of these brands consider themselves slow fashion.

Figure 10. Brands' Orientation according to Slow Fashion related Publications

3.2.3. Discussion

Results of the netnography demonstrate that although the Portuguese fashion brands deeper studied described themselves as slow fashion brands, not all of them emphasise this aspect in their online communications on Instagram's profiles nor significantly leverage it on their digital strategy on this platform. Again, as already mentioned, it may be explained by the general uncertainty about this concept (Mizrachi & Tal, 2022) or because brands do not consider this characteristic significant enough to base their online communications.

Some authors argue that the sustainable concept of slow fashion must include local production, high-quality fabrics and small collections (Štefko & Steffek, 2018), which seems to be quite limited. Since all the Portuguese fashion brands studied are produced locally, committed to quality, and work with low stocks, through this definition, it is possible to suppose that all the Portuguese fashion brands are slow fashion brands, a biased assumption at the very least.

4. Conclusions, Limitations and Future Research

4.1. Conclusions

One of the motivations for this investigation was to broaden the discussion about sustainable issues in the fashion industry. At a time when sustainability-related concerns are increasingly playing a decisive role in purchasing decisions, consumer awareness is still not enough to lead an industry-wide change, and fashion leaders are called upon to assume responsibility for the sustainable transition. So, considering sustainability as a growing strategic element and a competitive advantage in the fashion industry, it is essential to explore concepts and movements such as slow fashion since this is a booming concept.

Nevertheless, as mentioned throughout this investigation, the literature on this topic is scarce, and besides, it is possible to find some contradictions in the research carried out. With the studies conducted within this dissertation, the present research reveals itself to be innovative and extends previous literature on the slow fashion concept in Portugal.

However, it was possible to conclude that despite everything, the concept of slow fashion is still unknown to the majority of our sample and that for those who know is still hard for them to associate characteristics with slow fashion brands. In addition, it was also possible to conclude that the Portuguese brands that perceived themselves as slow fashion do not effectively benefit from this competitive advantage on Instagram's communications. Most of these brands have a limited percentage of publications on subjects related to this concept.

4.2. Limitations and Future Research

Notwithstanding the contributions that the present study may add to the literature, this research is subject to some limitations that future researchers should consider.

Limitations related to study 1 - the online survey. A non-probability sampling technique conducted did not allow the generalization of the results because the sample was not representative of the Portuguese population. Additionally, the sample consisted of adults aged between 19 and 59 years, and most participants were female rather than male.

Moreover, this has not allowed differentiating perceptions regarding the slow fashion concept between the younger or older population, nor between the two genders. As a result, the data and subsequent results could be susceptible to bias.

Limitations of study 2 – the netnography. It only considers data from one online community of Portuguese fashion brands, Instagram. If studied in parallel with other social networks, for example, the Facebook pages or respective brands' websites, the offline communities of Portuguese fashion brands, or even the published online news about the mentioned brands, the results might have been different.

Lastly, perhaps the most significant limitation, while being its most significant value added, relates to slow fashion being a relatively recent concept, meaning there are not too studies about this emergent subject.

In conclusion, since this paper is an exploratory study, there are some suggestions for further research. One is related to the target population investigated on which the research focused, the Portuguese market. It also might be interesting to conduct similar research in geographically larger samples to understand the impact of different locations and cultures on consumers' perception of the slow fashion concept and the positioning of slow fashion brands from other countries.

References

- Barnard, M. (2020). *Fashion Theory - A Reader* (2nd ed.). Taylor and Francis.
<https://doi.org/10.4324/9781315099620>
- Bennetta, K., & Oeppen Hill, J. (2022). Educating for Change?: An Investigation into Consumers' Perception of Sustainability and the Educational Drivers Needed to Support Sustainable Consumption. *International Journal of Fashion Design, Technology and Education*, 1–12. <https://doi.org/10.1080/17543266.2022.2083694>
- Brewer, M. K. (2019). Slow Fashion in a Fast Fashion World: Promoting Sustainability and Responsibility. *Laws*, 8(4), 24. <https://doi.org/10.3390/laws8040024>
- Caro, F., & Martínez-de-Albéniz, V. (2015). Fast Fashion: Business Model Overview and Research Opportunities. In *Retail Supply Chain Management* (pp. 237–264).
<https://doi.org/10.1007/978-1-4899-7562-1>
- European Environmental Agency. (2019). *Textiles in Europe's Circular Economy*.
<https://www.eea.europa.eu/publications/textiles-in-europes-circular-economy>
- European Parliament. (2021). *The Impact of Textile Production and Waste on the Environment - Infographic*.
- European Parliamentary Research Service. (2019). *Environmental Impact of the Textile and Clothing Industry - What Consumers Need to Know?*
- Fletcher, K. (2007). *Slow Fashion*. The Ecologist.
- Fletcher, K. (2008). *Sustainable Fashion and Textiles: Design Journeys* (1st ed.). Routledge.
<https://doi.org/10.4324/9781849772778>
- Fletcher, K. (2010). Slow Fashion: An Invitation for Systems Change. *The Journal of Design, Creative Process & the Fashion Industry*, 2(2), 259–265.
<https://doi.org/10.2752/175693810x12774625387594>
- Global Fashion Agenda & Boston Consulting Group & Sustainable Apparel Coalition. (2019). *Pulse of the Fashion Industry - 2019 Update*.

- Gunner, A. (2019). Fast Fashion and It's Impact on the Environment. *Fashion Logistics*, 40–41. <https://doi.org/10.36616/2686-9837-2020-5-215-218>
- Interbrand. (2021). The Decade of Possibility. In *Best Global Brands 2021*. <https://doi.org/10.1038/nj7399-537c>
- Ionela-Andreea, P. (2021). The Effect of the Consumer Decision-Making Process on the Perceived Value Toward Slow Fashion. *Three Seas Economic Journal*, 2(1), 1–7. <https://doi.org/10.30525/2661-5150/2021-1-1>
- Jung, S., & Jin, B. (2014). A Theoretical Investigation of Slow Fashion: Sustainable Future of the Apparel Industry. *International Journal of Consumer Studies*, 38(John Wiley & Sons Ltd), 510–519. <https://doi.org/10.1111/ijcs.12127>
- Jung, S., & Jin, B. (2016a). From Quantity to Quality: Understanding Slow Fashion Consumers for Sustainability and Consumer Education. *International Journal of Consumer Studies*, 40(4), 410–421. <https://doi.org/10.1111/ijcs.12276>
- Jung, S., & Jin, B. (2016b). Sustainable Development of Slow Fashion Businesses: Customer Value Approach. *Sustainability*, 8(540), 1–15. <https://doi.org/10.3390/su8060540>
- Kemp, S. (2021). *Digital 2021: Global Overview Report*. <https://datareportal.com/reports/digital-2021-global-overview-report>
- Kozinets, R. V. (2002). The Field Behind the Screen: Using Netnography for Marketing Research in Online Communities. *Journal of Marketing Research*, 39(1), 61–72. <https://doi.org/10.1509/jmkr.39.1.61.18935>
- Legere, A., & Kang, J. (2020). The Role of Self-Concept in Shaping Sustainable Consumption: A Model of Slow Fashion. *Journal of Cleaner Production*, 258(120699), 1–12. <https://doi.org/10.1016/j.jclepro.2020.120699>
- McKinsey&Company & Global Fashion Agenda. (2020). *Fashion on Climate - How the Fashion Industry Can Urgently Act to Reduce its Green House Gas Emission*.

- Mizrachi, M. P., & Tal, A. (2022). Sustainable Fashion - Rationale and Policies. *Encyclopedia*, 2, 1154–1167. <https://doi.org/https://doi.org/10.3390/encyclopedia2020077>
- Nunan, D., Birks, D. F., & Malhotra, N. K. (2020). *Marketing Research: Applied Insight* (6th ed.). Pearson Education Limited.
- Pal, R., & Gander, J. (2018). Modelling Environmental Value: An Examination of Sustainable Business Models within the Fashion Industry. *Journal of Cleaner Production*, 184, 251–263. <https://doi.org/10.1016/j.jclepro.2018.02.001>
- Pookulangara, S., & Shephard, A. (2013). Slow Fashion Movement: Understanding Consumer Perceptions - An Exploratory Study. *Journal of Retailing and Consumer Services*, 20, 200–206. <https://doi.org/10.1016/j.jretconser.2012.12.002>
- Stanton, A. (2021). *What Is Fast Fashion, Anyway?* The Good Trade.
- Štefko, R., & Steffek, V. (2018). Key Issues in Slow Fashion: Current Challenges and Future Perspectives. *Sustainability*, 10(2270), 1–11. <https://doi.org/10.3390/su10072270>
- The Business of Fashion & McKinsey&Company. (2021). *The State of Fashion 2021*.
- The Business of Fashion & McKinsey&Company. (2022). *The State of Fashion 2022*.
- Zarley Watson, M., & Yan, R. N. (2013). An Exploratory Study of the Decision Processes of Fast versus Slow Fashion Consumers. *Journal of Fashion Marketing and Management: An International Journal*, 17(2), 141–159. <https://doi.org/10.1108/JFMM-02-2011-0045>

Appendixes

Appendix A – Online Survey – Portuguese Version

Block 1 - Introduction (1 Question)

Q1.*

[Skip to](#)

End of Survey - If - Não Concordo em Participar - Is Selected

Caro Participante,

O presente questionário faz parte do projeto de investigação da minha dissertação - Slow Fashion in Portugal: An Exploratory Approach - apresentada como requisito parcial para a obtenção do Mestrado em Gestão de Informação, com especialização em Marketing Intelligence, pela NOVA Information Management School (IMS).

A duração é de aproximadamente 5 minutos.

Nota: A sua participação é voluntária. Os dados recolhidos serão tratados de forma anónima e utilizados apenas para fins académicos. Se assim entender, pode abandonar o preenchimento deste questionário a qualquer momento, sem nenhuma penalização. Ao aceitar participar neste estudo, declara que tens 18 ou mais anos de idade.

Se tiver alguma questão, por favor, entre em contacto: m20200318@novaims.unl.pt.

☐ Concordo em Participar

☐ Não Concordo em Participar

Block 2 - Slow Fashion (3 Questions)

Q2.*

Já ouviu falar do conceito *slow fashion*?

☐ Sim

☐ Não

Q3.*

[Display this Question](#)

If - Já ouviu falar do conceito *slow fashion*? - Sim - Is Selected

Se Sim, tem ideia do seu significado?

☐ Sim, sei o que significa.

☐ Tenho alguma ideia do significado.

☐ Sei mais ou menos o que significa.

☐ Não tenho ideia do significado.

☐ Não, não sei o que significa.

Q4.*

Display this Question

If - Se Sim, tem ideia do seu significado?

- Sim, sei o que significa. - Is Selected

Or - Tenho alguma ideia do significado. - Is Selected

Or - Sei mais ou menos o que significa. - Is Selected

Consegue enunciar três palavras que associe ao conceito *slow fashion*?

Block 3 - Slow Fashion Concept (1 Question)

Q5.*

Considere as afirmações apresentadas abaixo acerca do conceito *slow fashion*.

Selecione duas a três afirmações, em função da sua percepção deste conceito.

- ☐ O *slow fashion* está relacionado com a sustentabilidade ambiental.
- ☐ O *slow fashion* está limitado à sustentabilidade ambiental.
- ☐ O *slow fashion* está relacionado com o prazer e a moda.
- ☐ O *slow fashion* está associado à consciência.
- ☐ O *slow fashion* está associado à responsabilidade.
- ☐ O *slow fashion* enfatiza a qualidade em relação à quantidade.
- ☐ O *slow fashion* enfatiza a qualidade do ambiente.
- ☐ O *slow fashion* enfatiza a qualidade da sociedade.
- ☐ O *slow fashion* enfatiza a qualidade das condições de trabalho.
- ☐ O *slow fashion* enfatiza a qualidade dos negócios.
- ☐ O *slow fashion* enfatiza a qualidade dos produtos.
- ☐ O *slow fashion* é um movimento oposto ao *fast fashion*.
- ☐ O *slow fashion* é um movimento contra o desperdício.
- ☐ O *slow fashion* é um movimento contra o acompanhamento rápido de tendências.
- ☐ O *slow fashion* é um movimento contra o acompanhamento de tendências com qualidade mínima.
- ☐ O *slow fashion* é um processo de decisões mais conscientes ao nível do design.
- ☐ O *slow fashion* é um processo de decisões mais conscientes ao nível da produção.
- ☐ O *slow fashion* é um processo de decisões mais conscientes ao nível do consumo.

- ☐ O *slow fashion* é um processo de decisões mais conscientes tomadas por parte dos retalhistas.
- ☐ O *slow fashion* é um processo de decisões mais conscientes tomadas por parte dos consumidores.
- ☐ O *slow fashion* é um conceito associado às tendências de economia circular.
- ☐ O *slow fashion* é um conceito associado a compras em segunda mão, por exemplo.

Block 4 - Slow Fashion Brands (4 Questions)

Q6.*

[Skip to](#)

End of Block - If - Não - Is Selected

Conhece marcas de moda portuguesas?

- ☐ Sim
- ☐ Não

Q7.*

[Skip to](#)

End of Block - If - Não - Is Selected

Associa alguma dessas marcas ao conceito *slow fashion*?

- ☐ Sim
- ☐ Não

Q8.*

Se Sim, consegue dar algum exemplo?

Q9.*

Quais as características das marcas que associa ao conceito *slow fashion*?
Selecione uma a três afirmações, em função da sua perceção das marcas.

- ☐ São marcas com preços mais caros.
- ☐ São marcas produzidas em Portugal.
- ☐ São marcas com peças exclusivas.
- ☐ São marcas com peças intemporais.
- ☐ São marcas com peças de alta qualidade.

- ☐ São marcas com peças confeccionadas com materiais mais ecológicos.
 - ☐ São marcas que enfatizam a qualidade.
 - ☐ São marcas que enfatizam o comércio justo.
 - ☐ São marcas que produzem em menor quantidade.
 - ☐ São marcas conscientes.
 - ☐ São marcas sustentáveis.
 - ☐ São marcas responsáveis.
 - ☐ São marcas transparentes.
 - ☐ São marcas que se propõem a cumprir princípios éticos de respeito à comunidade.
 - ☐ São marcas que se propõem a reduzir o impacto ambiental na produção das suas peças.
 - ☐ Nenhuma das opções.
-

Block 5 - Demographic Data (6 Questions)

Q10.*

Qual o género com que mais se identifica?

- ☐ Feminino
- ☐ Masculino
- ☐ Terceiro Género
- ☐ Prefiro Não Responder

Q11.*

Qual a sua idade?

Q12.*

Selecione a opção que corresponda ao seu nível mais elevado de escolaridade concluído.

- ☐ Ensino Básico
- ☐ Ensino Secundário
- ☐ Curso Profissional
- ☐ Licenciatura
- ☐ Mestrado
- ☐ Doutorado
- ☐ Prefiro Não Responder

Q13.*

Qual a sua nacionalidade?

Q14.*

[Display this Question](#)

If - Qual a sua nacionalidade? - Portugal - Is Not Selected

Vive em Portugal?

- ☐ Sim
- ☐ Não

Q15.*

[Display this Question](#)

If - Vive em Portugal? - Sim - Is Selected

Se Sim, há quanto tempo vive em Portugal?

Appendix B – Online Survey – English Version

Block 1 - Introduction (1 Question)

Q1.*

[Skip to](#)

End of Survey - If - Não Concordo em Participar - Is Selected

Dear Participant,

This questionnaire is part of the research project of my dissertation - Slow Fashion in Portugal: An Exploratory Approach - presented as a partial requirement for obtaining the Master's Degree in Information Management, with a specialization in Marketing Intelligence, at NOVA Information Management School (IMS).

The duration is approximately 5 minutes.

Note: Your participation is voluntary. Data collected will be treated anonymously and used only for academic purposes. If you wish, you can abandon this questionnaire at any time without any penalty. By agreeing to participate in this study, you declare that you are 18 years of age or older.

If you have any questions, please contact: m20200318@novaims.unl.pt.

☐ Agree to Participate

☐ Not Agree to Participate

Block 2 - Slow Fashion (3 Questions)

Q2.*

Have you heard of the *slow fashion* concept?

- ☐ Yes
- ☐ No

Q3.*

[Display this Question](#)

If - Have you heard of the slow fashion concept? - Yes - Is Selected

If Yes, do you have any idea of what it means?

- ☐ Yes, I do know what it means.
- ☐ Yes, I do have an idea of the meaning.
- ☐ I know more or less what it means.
- ☐ No, I do not really have an idea of the meaning.
- ☐ No, I do not know what it means.

Q4.*

Display this Question

If - If Yes, do you have any idea of what it means?

- Yes, I do know what it means. - Is Selected

Or - Yes, I do have an idea of the meaning. - Is Selected

Or - I know more or less what it means. - Is Selected

Can you list three words that you associate with the *slow fashion* concept?

Block 3 - Slow Fashion Concept (1 Question)

Q5.*

To what extent do you agree with the following statements regarding *slow fashion*.
Select two to three statements, depending on your perception of this concept.

- ☐ *Slow fashion* is related to environmental sustainability.
- ☐ *Slow fashion* is limited to environmental sustainability.
- ☐ *Slow fashion* is related to pleasure and fashion.
- ☐ *Slow fashion* is associated with awareness.
- ☐ *Slow fashion* is associated with responsibility.
- ☐ *Slow fashion* emphasizes quality over quantity.
- ☐ *Slow fashion* emphasizes the quality of the environment.
- ☐ *Slow fashion* emphasizes the quality of society.
- ☐ *Slow fashion* emphasizes the quality of working conditions.
- ☐ *Slow fashion* emphasizes the quality of business.
- ☐ *Slow fashion* emphasizes the quality of products.
- ☐ *Slow fashion* is the opposite of fast fashion.
- ☐ *Slow fashion* is a movement against waste.
- ☐ *Slow fashion* is a movement against fast-tracking trends.
- ☐ *Slow fashion* is a movement against following trends with minimal quality.
- ☐ *Slow fashion* is a more conscious design decision process.
- ☐ *Slow fashion* is a more conscious decision-making process at the production level.
- ☐ *Slow fashion* is a more conscious decision-making process in terms of consumption.
- ☐ *Slow fashion* is a more conscious decision-making process made by retailers.

- ☐ *Slow fashion* is a process of more conscious decisions made by consumers.
- ☐ *Slow fashion* is a concept associated with circular economy trends.
- ☐ *Slow fashion* is a concept associated with second-hand shopping, for example.

Block 4 - Slow Fashion Brands (4 Questions)

Q6.*

[Skip to](#)

End of Block - If - Não - Is Selected

Do you know Portuguese fashion brands?

- ☐ Yes
- ☐ No

Q7.*

[Skip to](#)

End of Block - If - Não - Is Selected

Do you associate any of these brands with the *slow fashion* concept?

- ☐ Yes
- ☐ No

Q8.*

If Yes, can you give an example?

Q9.*

What are characteristics of brands do you associate with the *slow fashion* concept?
Select one to three statements, according to your perception of the brands.

- ☐ These are more expensive brands.
- ☐ These are brands produced in Portugal.
- ☐ They are brands with exclusive pieces.
- ☐ They are brands with timeless pieces.
- ☐ They are brands with high quality pieces.
- ☐ They are brands with pieces made with more ecological materials.
- ☐ These are brands that emphasize quality.

- ☐ These are brands that emphasize fair trade.
- ☐ They are brands that produce in smaller quantities.
- ☐ They are conscious brands.
- ☐ They are sustainable brands.
- ☐ They are responsible brands.
- ☐ They are transparent brands.
- ☐ These are brands that aim to comply with ethical principles of respect for the community.
- ☐ These are brands that aim to reduce the environmental impact in the production of their pieces.
- ☐ None of the options.

Block 5 - Demographic Data (6 Questions)

Q10.*

Which gender do you most identify with?

- ☐ Female
- ☐ Male
- ☐ Third Gender
- ☐ Prefer Not to Answer

Q11.*

What is your age?

Q12.*

Select the option that corresponds to the highest degree or level of school you have completed.

- ☐ Primary School
- ☐ High School
- ☐ Professional Course
- ☐ Bachelor's Degree
- ☐ Post-Graduation
- ☐ Master's Degree
- ☐ Doctorate Degree
- ☐ Prefer Not to Answer

Q13.*

What is your nationality?

Q14.*

[Display this Question](#)

If - What is your nationality? - Portugal - Is Not Selected

Do you live in Portugal?

- ☐ Yes
- ☐ No

Q15.*

[Display this Question](#)

If - Do you live in Portugal? - Yes - Is Selected

If Yes, how long do you live in Portugal?

Appendix C – Tables

Table A. 1. Demographic Sample Profile (N=210)

		Frequency (N)	Percentage (%)
Gender	Female	142	67,62%
	Male	66	31,43%
	Third Gender	1	0,48%
	Prefer Not To Answer	1	0,48%
Age	<20	1	0,48%
	20-29	96	45,71%
	30-39	60	28,57%
	40-49	45	21,43%
	50-59	8	3,81%
Education	Primary School	2	0,95%
	High School	24	11,43%
	Professional Course	15	7,14%
	Bachelor's Degree	79	37,62%
	Post-Graduation	21	10,00%
	Master's Degree	63	30,00%
	Doctorate Degree	5	2,38%
	Prefer Not To Answer	1	0,48%
Nationality	Brazil	30	14,29%
	China	1	0,48%
	Colombia	1	0,48%
	France	1	0,48%
	Germany	1	0,48%
	Mozambique	3	1,43%
	Portugal	171	81,43%
	South Africa	1	0,48%
	Yemen	1	0,48%
Place of Residence	Brazil	25	11,90%
	Colombia	1	0,48%
	Portugal	184	87,62%

Table A. 2. Have you heard of the slow fashion concept? (N=210)

	Frequency (N)	Percentage (%)
Yes	82	39,05%
No	128	60,95%

Table A. 3. If Yes, do you have any idea of what it means? (N=82)

	Frequency (N)	Percentage (%)
Yes, I do know what it means.	34	41,49%
Yes, I do have an idea of the meaning.	24	29,27%
I know more or less what it means.	19	23,17%
No, I do not really have an idea of the meaning.	3	3,66%
No, I do not know what it means.	2	2,44%

Table A. 4. Can you list three words that you associate with the slow fashion concept? (N=231)

	Frequency (N)	Percentage (%)
Sustainable/Sustainability 50	50	21,65%
Quality 24	19	8,23%
Long-Lasting/Durability 24	18	7,79%
Environment 24	16	6,93%
Awareness/Consciousness 20	13	5,63%
Respect/Responsibility 16	9	3,90%
Ecological/Ecology 16	8	3,46%
Expensive 16	7	3,03%
Reduce/Recycle/Reuse 16	7	3,03%
Other Words*	80	34,63%
No Answer	4	1,43%

*Other Words, include: Fashion (2,60%), Unique/Exclusive/Singular (2,16%), Ethical (1,73%), Timeless (1,73%), Circular Economy (1,30%), Less Quantity (1,30%), People (1,30%), Fair Price (1,30%), Transparency (1,30%), Diversity (0,87%), Fair (0,87%), Reduced Wastage (0,87%), Fair Remuneration (0,87%), Slow (0,87%), Accessories (0,43%), Artisan (0,43%), Cheap (0,43%), Boutique (0,43%), Capsule (0,43%), Clean (0,43%), Buying Behaviour (0,43%), Concept (0,43%), Trust (0,43%), Care (0,43%), DCK (0,43%), Economy (0,43%), Entrepreneurship (0,43%), Choices (0,43%), Frugality (0,43%), Futuristic (0,43%), Global (0,43%), Innovation (0,43%), Limited (0,43%), Local (0,43%), Change (0,43%), Need (0,43%), Organic (0,43%), OSKLEN (0,43%), Small Collections (0,43%), Personalization (0,43%), Savings (0,43%), Price (0,43%), Premium (0,43%), Slow Food (0,43%), Value (0,43%), Added Value (0,43%), Labour Valorisation (0,43%), On-Demand Shopping (0,43%), Saving (0,43%), Inventory Management (0,43%).

Table A. 5. Do you know Portuguese fashion brands? (N=210)

	Frequency (N)	Percentage (%)
Yes	151	71,90%
No	59	28,10%

Table A. 6. Do you associate any of these brands with the slow fashion concept? (N=151)

	Frequency (N)	Percentage (%)
Yes	51	33,77%
No	100	66,23%

Appendix D - List of Portuguese Fashion Brands

Instagram	Posts	Followers	Description Keywords	Website
@ARCANE.JEWELLERY	385	9 686	"contemporary" "made in Portugal"	arcane-jewellery.com
@BSIMPLE.PT	1 201	10 600	"conscious" "responsible" "sustainable fashion brand" "stylish comfort" "made in Portugal"	bsimple.pt
@CAMPOSSTORE__	1 048	16 200	"exclusively" "specialized ateliers"	camposstore.com
@CAROLINACURADO	1 960	49 600	"handmade" "made in Portugal"	carolinacurado.com
@INEDIT.DESIGN	1 035	13 300	"slow fashion" "made in Portugal"	ineditdesign.com
@JESS.WORLDSTORE	247	3 606	"contemporary"	jess-world.com
@MAHRLASTORE	4 263	62 300	"ethically" "made in Portugal"	mahrla.pt
@MARAY_SHOES	635	20 800	"made in Portugal"	maray.pt
@SOMOSMARIE	621	12 400	"produced responsibly" "in Portugal" "respect for nature"	somosmarie.com
@NAZARETHCOLLECTION	1 151	6 819	"sustainable fashion Brand" "made in Portugal" "surplus raw materials"	nazarethcollection.com
@PAPARINA.STUDIO	367	13 900	"ethical" "made in Portugal"	paparina-store.com
@PENSART	412	10 900	"feitos à mão"	pensart-shop.com
@VINTAGEBAZAARPT	3 601	100 000		vintagebazaar.pt
@CATAVASSALO	1 051	82 600	"slow fashion" "marca portuguesa"	catavassalo.com
@CATEANDCO.SHOP	409	21 800		cateandco.pt/pt
@CLUOH	1 526	25 700	"to make a difference"	cluoh.com/pt
@CRISMARIA_JEWELLERY	552	6 498	"handmade"	crismaria.pt
@ISTO.PT	1 110	38 100	"luxury essentials" "affordable" "100% organic" "transparently" "made in Portugal"	isto.pt

@JOSEFINASPORTUGAL	5 331	117 000	"handmade" "in Portugal"	josefinas.com/pt
@MARIABEIRAO.PORTUGAL	1 181	19 400	"minimal" "contemporary"	mariabeirao.com
@MARIAGUEDESLISBOA	179	18 100		mariaguedeslisboa.com
@MELIESTORE	2 761	44 000		meliestore.com
@MILKANDSNOW_	2 580	11 100	"stylish" "Portuguese brand"	milkandsnow.pt
@MIO.JEWELS	539	7 983	"Portuguese" "handmade"	mio-jewels.com
@MOREISBETTER	4 800	18 800	"Design in Lisbon" "made in Portugal" "handmade"	moreisbetter.pt
@MUSTIQUE__	198	30 200	"Lisbon" "made in Portugal"	mustiqueworld.com
@OHMONDAY__	1 653	40 400	"consciente" "informada" "versátil"	oh-monday.com/pt-pt
@PALLAS.PT	1 790	12 800	"urban" "Portugal"	pallas.pt
@UMBRA_BRAND	162	3 541	"feitos em Portugal"	umbra-brand.com
@VALONIAVERAS_EUROPE	63	1 188	"handmade" "authentic"	valoniaveras.com
@XICALARICA_	6 599	30 500		xicalarica.pt
@THE_ZAWI_STATEMENT	576	4 416	"materiais naturais" "feitos por artesãos"	zawi.pt
@PERA.LIMA.CLOTHES	93	2 647	"sustainable" "unique design"	peralima.net
@BAM_BYANAMENEZES	1 161	9 360	"fashion brand"	bamstore.eu
@JAYBEE.JEWELLERY	864	54 700		jaybee.pt/pt
@HARPER_PT	672	22 100	"Portuguese brand" "attitude"	harper.pt
@GRACEBABYANDCHILD	1 005	13 400	"tradition" "cosmopolitan" "modernity" "from Portugal"	gracebabyandchild.com
@LEMONHAIR_WOMANTHING	176	3 515		lemonhairwoman.com
@PIRIPACKBRAND	75	1 413	"timeless" "multifunctional" "made in Portugal"	piripack.com
@FLUYT.PT	282	8 445	"slow fashion" "natureza" "relações duradouras" "momentos"	fluyt.pt

			<i>verdadeiros</i> <i>"non-disposable wear"</i>	
			<i>"from the ocean"</i> <i>"vegan"</i> <i>"fair"</i> <i>"ethical"</i> <i>"sustainable"</i> <i>"plastic from the ocean"</i> <i>"handmade"</i> <i>"in Portugal"</i>	zouri-shoes.com
@ZOURIVEGANSHOES	1 390	43 000		
@MYLO.BABYKIDS	125	5 246	<i>"Portugal"</i>	babymylo.pt
@UNDERSLEEPWEAR	392	14 700	<i>"made in Portugal"</i>	undersleepwear.com
@STRELITZIABRAND	262	10 100	<i>"handmade"</i> <i>"in Portugal"</i>	strelitzia.pt
@HYENATAILORMADE	476	9 063	<i>"customize"</i> <i>"Portuguese brand"</i>	hyena.pt
@BYOU_PATRICIAGOUVEIA	3 168	33 100		byoubb.com
@BENEDITAFORMOSINHOBRAND	832	16 200	<i>"Portuguese designer"</i> <i>"effortless silhouettes"</i> <i>"slow fashion"</i> <i>"made in Portugal"</i>	beneditaformosinho.com
@LEMOT.TEES	2 806	26 600	<i>"born in Paris"</i> <i>"created in Lisbon"</i> <i>"made in Portugal"</i>	le-mot.com
@MATILDAJEWELLERY	864	26 200		matildajewellery.com
@GROW_MATERNITY	179	37 000	<i>"ethically made"</i> <i>"functional"</i> <i>"made in Portugal"</i> <i>"sustainable fabrics"</i>	growmaternity.com
@SOPROJEWELLERY	454	10 000	<i>"nature"</i>	https://soprojewellery.com
@TEMA_CREATIONS	2 036	33 900	<i>"exclusive"</i> <i>"born in Lisbon"</i>	temacreations.pt
@SHOPTHEALMOND	195	37 500	<i>"made in Portugal"</i> <i>"slow"</i> <i>"conscious"</i>	the-almond.com
@COOLET_CONCEPT	133	4 592		shopcoolet.com
@OYEZBRAND	711	18 600	<i>"designed and made in Portugal"</i> <i>"Portuguese fabrics"</i>	oyezstore.com
@JULIANABEZERRAJEWELLERY	4 939	49 100		julianabezerra.com
@CANTELISBOA	4 016	177 000		cantelisboa.com

