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How Consumers Perceive Influence in the Contemporary Fashion System: An Analysis Across the Consumer Decision Journey

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This thesis investigates how consumers perceive different sources of fashion influence in an increasingly digitalised environment. Drawing on survey data from 166 respondents, the study examines the perceived impact of brands, peers, influencers, and algorithms across the Consumer Decision Journey. The findings show that consumers primarily rely on personal judgement, product attributes, and close social relations, while influencer and algorithmic influence is perceived as limited. The research contributes to a clearer understanding of how influence is interpreted in digital contexts and offers practical implications for fashion brands seeking to align their communication and visibility strategies with actual consumer perceptions.

Keywords

Fashion Influence, Consumer Decision Journey, Perceived Influence, In-Store Discovery, Algorithmic Mediation

Table of Contents

1. Introduction

The fashion industry has undergone a profound transformation in recent years, driven by digitalization, social media, and the rise of new intermediaries who shape visibility and desirability. Traditional sources of fashion authority (designers, magazines, and forecasting agencies) no longer hold exclusive control over trend formation, as influence now circulates among brands, influencers, peers, and digital platforms. Algorithmic recommendation systems further mediate fashion discovery, reshaping how consumers encounter and evaluate products. These shifts have created a more complex and participatory fashion ecosystem, raising questions about how consumers themselves understand influence within this environment.

Despite extensive theoretical discussion on these shifts, there is limited research examining how ordinary consumers perceive different sources of influence in their decision-making. Industry narratives often assume strong impact from influencers and algorithms, yet it remains unclear whether consumers interpret their choices in this way. This perceptual dimension is crucial, particularly as marketing strategies increasingly rely on influencer partnerships, algorithmic targeting, and digital visibility without fully considering how influence is recognized (or overlooked) by consumers.

This study addresses this gap by exploring how consumers perceive the actors and mechanisms that influence their fashion purchases across the Consumer Decision Journey (CDJ). It focuses on subjective attributions of influence: who consumers believe shapes their decisions, which motivations they emphasize, and which touchpoints they consider most meaningful.

The research pursues four objectives: identifying the main perceived sources of influence; examining how influence varies across CDJ stages; assessing awareness of algorithmic mediation; and exploring demographic and engagement differences. The thesis proceeds through a literature review, methodology, results, and discussion. It then presents practical recommendations, acknowledges the study's limitations, and outlines directions for future research.

2. Contextual Background

2.1 The Evolution of Fashion Authority and Trend Diffusion

2.1.1 Fashion as a Cultural and Market System

Fashion is not merely about clothing but a complex social system of meaning and power. As Godart observes, fashion is "in many respects, a total social fact" (Godart 2012, 13) encompassing artistic, economic, political, and sociological dimensions that allow individuals and groups to signal identity. In this light, fashion trends are not spontaneous phenomena but socially constructed "focalizations of desire" (Erner 2009, quoted in Godart 2012, 35), temporary alignments of collective tastes around certain styles.

Studying trendsetting thus illuminates how fashion mediates both social identity and market coordination. Classic sociologists of fashion emphasize how imitation and distinction drive trends: people imitate others to connect yet also seek novelty and exclusivity. Lower social groups adopt elite styles, and the elites then shift to maintain distinction- a dialectic that keeps fashion continually evolving (Godart 2012).

These identity dynamics operate alongside economic forces. Godart conceptualizes a *Convergence Principle* whereby diverse cultural signals concentrate in fashion capitals such as Paris and Milan and are filtered into coherent market directions. Seasonal collections, forecasting agencies, and industry fairs translate creative ideas into business plans (Godart 2012; BoF 2014; Wynne 2023). In this way, trends function as market signals that coordinate production and consumption, embedding constant innovation in the industry.

Viewing fashion as both a cultural and market system establishes a foundation for understanding influence as a social process, rather than a purely economic or communicative one, setting the stage for examining how authority is constructed and interpreted within fashion.

2.1.2 Historical Structures of Fashion Authority

Historically, this socio-economic fashion system was governed by centralized authorities. In the pre-digital era, trend power rested with cultural elites (royal courts, couturiers, and industry institutions) who dictated style hierarchies for everyone else. Royal figures like Marie Antoinette shaped dress codes as political symbolism (Fury 2025).

By the nineteenth century, Parisian couturiers had established themselves as arbiters of taste. As the *Financial Times* (2025) notes, Charles Frederick Worth revolutionized fashion by introducing branded seasonal collections, shifting influence from aristocratic patrons to designers. Following Worth, early maisons such as Hermès, Lanvin, Chanel, and Dior strengthened the authority of fashion houses by institutionalizing creative leadership and shaping the aesthetics of their eras (Vogue 2025; Fury 2025a). For instance, forecast agencies such as Nelly Rodi produced early style reports, and trade fairs including Première Vision and Pitti Uomo aligned industry actors around seasonal directions (Première Vision n.d.; BoF 2024; Wynne 2023)

Gatekeeping media further reinforced this top-down model: magazines and television pre-selected each season's "in" looks, shaping the industry narrative (Tashjian 2025). In effect, designers proposed the creative vision, and only after collections debuted could the public accept or reject them (Camhi 2025). As *Business of Fashion* observes, traditional media tightly managed the speed and direction of diffusion until the internet began to overturn their dominance (Bain 2022). In sum, the pre-digital fashion system operated as a hierarchy: elites introduced styles that gradually filtered down to the masses. These historical models of centralised authority provide a reference point from which contemporary transformations in fashion influence can be understood.

2.1.3 From Gatekeepers to Networks: The Rise of Participatory Fashion

This traditional model aligns with early diffusion theory. Rogers's S-shaped *Diffusion of Innovations* curve describes innovations spreading from innovators through early and late adopters to laggards (Rogers 1995, 242-250) (Figure 1, Appendix D). Within the traditional fashion hierarchy, designers and forecasters occupied the innovator tier, legitimizing new styles that consumers later embraced (Berk 2023) . Thus, the fashion adoption curve mirrored a top-down influence consistent with the hierarchical structure of authority.

However, scholars have found that fashion diverges from generic diffusion. The fashion adoption curve is skewed toward early stages, meaning trends spread faster and reach more people sooner than in other industries (Workman et al. 2017). Their revised model which introduces categories such as "consumer change agents" and "reluctant adopters", emphasizes the role of ordinary consumers propagating new styles through sharing them (Figure 2, Appendix D). This implies that even before the internet, diffusion was becoming more participatory: consumers were no longer merely passive recipients but increasingly active contributors to trend circulation (Workman et al. 2017). In other words, the rigid top-down logic began to soften as social connections enabled broader, quicker dissemination.

The shift from gatekeeping institutions to networked participation marks a reconfiguration of where influence is produced, raising questions about how authority is redistributed and recognized within the fashion system.

2.1.4 Digital Media and Participatory Trend-making

The rise of digital platforms has accelerated this shift. Social media has flattened and sped up trend cycles, enabling styles to go viral almost overnight. Industry analysts estimate that roughly 70 % of fashion purchases are now digitally influenced (D'Auria 2025), highlighting how online visibility has become a primary driver of trends. Unlike the slower, designer-led cycles of the past, the current landscape is marked by fast-moving microtrends around influencers and user-generated content (López 2023).

As a result, consumers increasingly act as prosumers, active creators and validators of fashion ideas. Social media users can be understood as "institutional entrepreneurs" who, through prosumption, exert significant influence on trend formation. Brands have responded to this democratization by adopting a more listening-oriented role, using social signals and digital tracking to align designs with emerging tastes in real time (Strähle 2016, 96). McKinsey (2025) reports that three-quarters of fashion executives now prioritize AI for forecasting and demand planning, reflecting the industry's shift toward data-responsive creativity, including the monitoring of social trends and co-creation with influencers.

In this context, fashion is increasingly articulated through blogs, influencers, and social media users who act as mediators between brands and audiences, transforming fashion shows and brand practices into global media events (Rocamora 2016, 509-517). Digital platforms intensify this shift by multiplying points of visibility and participation, blurring traditional distinctions between producers, intermediaries, and consumers.

2.1.5 Algorithmic Visibility and AI-Driven Forecasting

Algorithms now exert an unprecedented influence on trend visibility. Recommendation systems and analytics tools sift through vast amounts of data (runway images, retail sales, social posts) to identify emerging patterns faster than human forecasters. As The Guardian (2023) notes, AI can detect nascent signals and curate trend visibility at enormous speed. McKinsey (2025) finds that most fashion firms now use AI in trend prediction, making algorithmic tools integral to commercial decision-making.

However, algorithmic curation has its limits. WGSN's Francisca Muston cautions that while algorithms can measure online engagement but they "cannot fully interpret aesthetic preference or cultural meaning" (Biehlmann 2023). In effect, algorithms function as intermediaries: they amplify certain styles while others remain largely unnoticed. Yet they do not create taste themselves. Instead, they reshape the conditions under which brands and consumers interact. They filter the attention of millions and thus help determine which trends gain traction, yet the creative spark still comes from human actors-brands or consumers-who produce content and meaning.

These transformations mark a turning point in the fashion system: power and meaning are no longer imposed from above but distributed across human-algorithm networks. As algorithmic systems increasingly mediate what becomes visible within fashion, influence is no longer only exercised through identifiable actors, but also through less perceptible infrastructural processes.

While these transformations reshape the fashion system, they are ultimately experienced by consumers in how they discover, evaluate, and choose fashion items, shifting the focus toward the consumer perspective.

2. 2. Contemporary Fashion Influence and the Consumer Journey

2.2.1 Fashion Archetypes and Consumer Segmentation in the Digital Era

If the first part of this review traced the diffusion of power from designers to consumers, this section turns to the diversity of consumer roles that structure today's participatory landscape. Drawing on Workman and Lee's (2017) revised diffusion model, four behavioural archetypes capture the heterogeneity of fashion consumers.

Consumer change agents combine the traits of innovators and opinion leaders. They are highly involved, creative, and influential, often introducing or legitimising new styles before others adopt them (Workman et al. 2017). Consumer change agents frequently serve as early introducers and legitimisers of new aesthetics, playing a role similar to designers and cultural figures characterised as the "vanguard" of fashion (Ellison 2025). Early adopters then advance the visibility of these new aesthetics, propelling trends toward mass visibility (Workman et al.

2017). In today's context, influencers act as key drivers of this process, converting personal style into mass appeal through digital exposure (Kastenholz 2024).

Late adopters, by contrast, engage only once trends have achieved mainstream legitimacy (Workman et al. 2017). They represent the majority of consumers motivated by social conformity or affordability. This is consistent with findings from McKinsey and the Business of Fashion, which report that nearly one in three U.S. adults purchased a "dupe" of a luxury item, primarily due to price (McKinsey 2025, 62). Reluctant adopters occupy the final stage of the diffusion curve. They are cautious, sustainability-driven consumers who prioritise durability, repair, and mindful consumption over novelty (Workman et al. 2017; Cernansky 2025). These archetypes not only highlight differences in engagement but also offer a foundation for understanding how various consumers interact with different sources of influence throughout the decision journey. Recognising different consumer positions within the fashion system highlights that influence is neither uniform nor passively received, but varies according to engagement, identity, and social context.

2.2.2 Stakeholders in the Contemporary Fashion System

Despite rising consumer participation, fashion operates within a broader ecosystem of interconnected stakeholders who transform creativity into cultural and commercial value. Walters (2025) outlines five groups that sustain this system: designers and brands, curators, content providers, consumers, and digital platforms.

Designers and brands set aesthetic and strategic direction, with design functioning not only as visual styling but as a driver of innovation and customer experience (Desai 2016). Curators (including buyers, merchandisers, and stylists) filter creative ideas into marketable selections (Lindecrantz, Gi, and Zerbi 2020). Content providers such as editors, photographers, and influencers translate these selections into narratives that circulate across media, mediating how audiences interpret collections (Rocamora 2017). Consumers act as prosumers who participate in, adapt, and amplify trends through digital engagement (Strähle 2016). Digital platforms connect these actors by integrating search, recommendation, and analytics, accelerating trend diffusion (McKinsey & Company and BoF 2025).

This networked logic provides the context for understanding how consumers experience and respond to influence today. The growing number of actors involved in fashion influence complicates the question of authority, blurring which sources are ultimately recognized as influential by consumers themselves.

2.2.3 Mechanisms of Influence in Today's Fashion Landscape

Within this networked system, influence is no longer unidirectional but arises from a combination of psychological, social, technological, and cultural factors.

Psychological influence stems from fashion's power to shape self-image and emotion; according to the American Psychological Association, "the clothes we put on every day tell a story about who we are to the world and can have a major impact on our emotions and mood" (Mair 2019). Social influence remains central to fashion diffusion: imitation, distinction, and social validation continue to drive adoption, now amplified by digital communities and influencer relationships (Godart 2012).

Algorithmic influence shapes visibility, as recommendation systems and social-media algorithms determines which styles surface and which products appear in users' feeds, influencing exposure and desirability (Bain 2024). Curatorial influence occurs through stylists, editors, and retailers who orchestrate meaning and frame consumption (Florea et al., 2025). Brand influence is constructed through storytelling and authenticity, as brands mobilise heritage, creative personas, and immersive experiences to establish emotional connection (BoF Team and McKinsey & Company 2023). Finally, cultural and environmental influence reflects the rise of sustainability-minded consumers who prioritise ethics, durability, and long-term value (Workman et al. 2017; Cernansky 2025).

Together, these forms of influence coexist and intersect across the consumer journey, raising the question of how consumers recognise, negotiate, and prioritise them in their everyday fashion decisions.

2.2.4 The Consumer Decision Journey in Fashion

Understanding these mechanisms requires analysing how influence unfolds over time. McKinsey & Company (2009) conceptualised the **consumer decision journey (CDJ)** as a circular model comprising four stages: *initial-consideration set*, *active evaluation*, *moment of purchase*, and *postpurchase experience* (Court et al. 2009; see Figure 3, Appendix D). The updated model (McKinsey & Company, 2015) incorporates digitalization, data analytics, and omnichannel retail, emphasising a more fluid and feedback-driven process in which companies can actively influence and reshape consumer decision journeys (Edelman and Singer 2015; see Figure 4, Appendix D). In the fashion context, the **initial-consideration set** emerges when consumers encounter styles through runways, media, influencers, or algorithmic feeds that shape what gains visibility (Bain 2024). During **active evaluation**, they compare options and seek validation from peers, curators, and stylists who interpret trends (Godart 2012; Strähle 2016). The purchase stage is shaped by brand reputation, pricing, user experience, and retail curation (Lindecrantz, Gi, and Zerbi 2020). Finally, the **post-purchase experience** involves social sharing, resale, and review-activities that reinforce visibility and feed back into subsequent consumer awareness.

Overall, the CDJ portrays fashion consumption as a continuous cycle shaped by human, cultural, and algorithmic actors. Authority is no longer centralised but distributed across a network in which meaning, desirability, and visibility are constantly negotiated. As consumers move through the journey, they encounter overlapping sources of influence. The Consumer Decision Journey therefore provides a structure for examining how these multiple sources of influence are encountered and interpreted by consumers across moments of choice.

This review therefore leads to the central research question of this study:

How are consumers influenced in today's fashion system, and by whom? More specifically, how do different stakeholders and mechanisms of influence shape each stage of the consumer decision journey, and what factors sustain consumers' engagement throughout it?

3. Methodology

3.1 Research Problem

The digital transformation of the fashion system has redistributed influence across brands, peers, influencers, and algorithms. While widely discussed in theory, little empirical work examines how consumers themselves perceive these sources of influence throughout the fashion decision journey. This study therefore explores how individuals understand fashion influence in a digital environment and which actors they feel most shape their purchasing decisions.

3.2 Research Objectives and Questions

The study examines how consumers perceive different sources of influence across the Consumer Decision Journey (CDJ) and whether these perceptions vary by demographic or engagement factors. It addresses four questions:

1. Who are the main sources of influence in consumers' fashion purchases in the digital era?
2. At which stages of the consumer decision journey does each source (brand, influencer, peer, algorithm) exert greater influence?
3. To what extent do consumers perceive algorithms as intermediaries in their fashion decision-making process?
4. How do demographic or engagement factors shape perceptions of fashion influence?

3.3 Research Design and Data Collection Method

3.3.1 Rationale for Using a Survey

A survey approach was chosen because it enables the efficient collection of data from a large and diverse group of consumers, aligning with the study's aim to identify broad patterns of perceived influence. Surveys allow researchers to reach many participants and ask standardised questions, a key advantage highlighted in the literature (Jain 2021, 543). In contrast, interviews (while richer in detail) are far less suitable for large samples, as they require extensive scheduling, transcription, and time commitment (Jain 2021, 552). Given the scale of this study (N = 166), interviews were not feasible. Therefore, a survey constituted the most appropriate and methodologically efficient choice.

3.3.2 Survey Design

The questionnaire, titled *"Fashion Influence in the Contemporary Consumer Decision Journey,"* comprised 22 questions divided into five sections aligned with the Consumer Decision Journey: Purchase context; Evaluation and motivation; Purchase experience; Post-purchase reflection and engagement; and Demographics.

These sections followed the logic of the consumer decision journey and covered the type of product purchased, discovery channels, motivations, perceived influence, and engagement behaviour after purchase.

The survey consisted mainly of closed-ended multiple-choice and Likert-scale items (1-5) to ensure comparability across responses, along with one open-ended question inviting participants to describe what most influences their fashion purchases. This qualitative item complemented the quantitative data by adding interpretive depth.

3.4 Sample Characteristics and Measurement

3.4.1 Population and Sample

The target population for this study comprised fashion consumers in general, individuals of any age, gender, or professional background who had purchased at least one fashion product (clothing, footwear, bag, or accessory) in the previous twelve months.

Because the total population of fashion consumers is vast and no complete sampling frame exists, a non-probabilistic convenience sampling approach was adopted. The survey was distributed widely through Instagram, WhatsApp group chats (including friends, family, and university colleagues who further shared it with others), colleagues at work, and random individuals approached in shopping malls. Although no formal pre-screening question was included, the survey introduction clearly instructed participants to answer based on their most recent fashion purchase within the last twelve months. While this sampling method does not permit statistical generalisation, it is appropriate for exploratory research and enabled the study to capture a broad range of consumer perspectives.

3.4.2 Measures and Variables

The survey collected several demographic and engagement variables to describe the sample and support subgroup comparisons. These included gender, age group, nationality, occupation, and self-reported fashion interest. A concise summary of the sample composition is shown in Table 3.1, while full demographic distributions are presented in the Appendix B, Table 22.

Table 3.1. Summary of Sample Demographics (N = 166)

Category	Subgroup	Count	Percentage
Gender	Female	132	79,5%
	Male	33	19,9%
	Non-binary	1	0,6%
Age	Under 20	18	10,8%
	20-29	82	49,4%
	30-39	7	4,2%

	40+	59	35,5%
Nationality	Portuguese Spanish French Serbian Swiss	147 16 1 1 1	88.6% 9.6% 0,6% 0,6% 0,6%
Occupation	Professional in another field Student Fashion professional Retired Not currently employed	82 56 15 9 4	49,4% 33,7% 9% 5,4% 2,4%
Fashion interest	Low Medium High	19 52 95	11,4% 31,3% 57,2%

3.5 Data Treatment and Ethical Considerations

All responses were collected anonymously and used solely for academic purposes. The data were checked for consistency before analysis, which focused on descriptive and interpretive insights to identify key patterns and connect participants' perceptions with the theoretical framework of fashion influence and the consumer decision journey.

4. Results

This section presents the results of the survey and discusses them in relation to the research questions and the existing literature. It explores how consumers perceive influence across the fashion decision journey, which actors they identify as most influential, and how these perceptions vary across demographic groups. The findings are interpreted in light of recent discussions on digital transformation, the decentralisation of fashion authority, and the changing interplay between human and algorithmic forms of mediation.

4.1 Overall Patterns of Influence

The survey results demonstrate that, despite the highly digital fashion environment, consumers continue to interpret influence mainly through human and brand-centred cues.

The discovery stage illustrates this most clearly. Nearly half of respondents (49.4%) first encountered their purchased item through physical store displays, while 20.5% discovered it through brand-owned channels, and only 16.9% through social media (see Figure 5, Appendix D). These results counter the prevalent claim that contemporary fashion discovery is predominantly shaped by algorithmic recommendation and influencer exposure. Instead, they highlight a persistent reliance on physical retail environments, echoing studies that suggest the sensory, curated nature of stores continues to anchor early-stage fashion engagement.

The open-ended responses reinforce this pattern. When asked what most influences their fashion purchases today, participants frequently referred to their own taste and product qualities, with answers such as "O meu estilo pessoal," "My own style," "Expressing myself," "Quality of the products and versatility," and "The price." Many also highlighted comfort and practicality (e.g., "What I feel most comfortable wearing," "If it's timeless, has good quality and a fair price"), as well as need-based reasoning ("what I really need (…)", "If I like it and need it "). Mentions of digital or social sources appeared but were far less common, with occasional references like "Haul's on Tiktok," "Influencer content," or "Internet algorithms." Overall, the qualitative responses mirror the quantitative findings, showing that consumers largely attribute influence to personal judgement and product characteristics rather than to influencers or algorithmic exposure (see Figure 1, Appendix C).

In the **evaluation stage**, respondents consistently foreground intrinsic product qualities. Over half (54.8%) identified **design and quality** as their main reason for purchasing, followed by practicality. Trend relevance (10.8%), online visibility, and social pressure were selected far less often. These findings converge with existing literature suggesting that, although digital platforms increase the visibility of trends, consumers continue to articulate their choices through aesthetic self-expression and functional alignment rather than purely trend-driven motivations (see Figure 6, Appendix D).

Influence ratings provide further insight into this dynamic. When evaluating the role of different actors respondents rated brands/designers and peers as the most influential, while influencers and algorithms consistently received the lowest scores. This hierarchy was also evident in retrospective attributions of influence: 34.9% identified brands as the strongest overall influence during the product journey, followed by 23.5% who selected friends or peers. Only approximately 8% attributed the strongest influence on influencers or algorithms combined (see Figure 7; Figure 8, Appendix D). These results reflect broader theoretical discussions on the shift from aspirational to relational forms of influence, highlighting the continuing importance of social proximity and brand identity over more diffuse, platform-driven visibility.

Although digital systems structure much of fashion visibility today, algorithms remain largely invisible at the level of consumer perception. Only 20.5% remembered seeing the product in a targeted ad, and very few respondents positioned themselves near the “entirely algorithmically influenced” end of the human–algorithm scale (approximately 4%) (see Figure 9; Figure 10, Appendix D). This supports academic claims that, while algorithms increasingly curate cultural content, their operations are often obscured from the user perspective, generating a gap between structural influence and subjective experience.

The purchase stage is marked by speed and confidence. A combined 62.7% of participants purchased the item either immediately or within one to three days of discovery, and confidence ratings were high (M = 4.26/5). More than half (55.4%) did not seek validation, and among those who did, most of the validation sources selected related to peers (71.9%), while influencer-based validation was almost negligible (see Figure 11, Appendix D; Table 1; Table 2; Table 3; Appendix B). These findings contradict assumptions that contemporary consumers engage in extended comparison processes, suggesting instead a more intuitive and self-assured decision-making style.

Finally, post-purchase behaviour reflects a continuation of these interpersonal dynamics. Sharing on social media was rare (8.4%), yet 63.9% continued following or engaging with the brand or source that influenced their purchase. This suggests that consumers largely operate as followers rather than creators, reinforcing influence loops through ongoing attention rather than active content production (see Table 4 ; Table 5, Appendix B).

Overall, the findings reveal a hybrid model of influence that is digitally structured yet experienced as fundamentally human. Despite algorithmic mediation and a decentralized fashion system, consumers continue to attribute influence mainly to themselves, brands, and close peers. This gap between structural digital influence and subjective perception is one of the most significant findings of the study.

4.2 Age-Based Differences in Influence

Age influences the intensity of certain behaviours and digital engagements, but it does not alter the overall hierarchy of influence. Across all age groups, brands and peers remain the most meaningful sources of influence, while influencers and algorithms continue to play secondary roles. Even though younger consumers are more embedded in digitally saturated environments, their interpretations of influence remain grounded in relational and brand-based cues.

Table 4.2. Age-Based Differences Across Key Variables

Variable	Under 20	20-29	30-39	40+
Social media discovery	27.8%	20.7%	0%	10.2%
Instagram & TikTok Influence	50%	43.9%	42.9%	16.9%
Immediate Purchase	22.2%	45.1%	14.3%	49.2%
Validation seeking	61.1%	59.8%	42.9%	18.6%
Shared online	11.1%	12.2%	14.3%	1.7%

Algorithm awareness (≥4)	16.7%	22%	0%	6.8%
Targeted ad recall	22.2%	25.6%	42.9%	10.2%

Discovery and platform engagement show the clearest age differences. Younger respondents, especially those under 29, were more likely to have discovered their purchased item through social media, whereas older participants tended to rely more on physical store environments and brand-owned channels. This pattern is mirrored in platform influence: while influence from Instagram or TikTok was reported by around half of those under 20 and over 40% of those aged 20–29, it dropped to under 20% among respondents aged 40 and above. These trends align with prior studies showing that younger consumers navigate more digitally saturated environments, indicating that digital exposure intensifies their fashion engagement rather than replacing other sources of influence.

Decision-making behaviours also vary by age. Immediate purchase was most common among respondents aged 20–29 and those over 40, whereas younger respondents tended to delay slightly longer before committing to their purchase. Validation seeking shows the strongest generational distinction: the majority of respondents under 29 sought feedback before buying, compared with fewer than one in five among the 40+ group. This pattern reinforces the idea that younger consumers tend to integrate relational cues more actively into their decision-making process.

Age differences continue into the post-purchase stage. Younger consumers shared their purchase online more frequently (11-14%) than those aged 40+ (1.7%). They also exhibited higher awareness of algorithmic mediation and were more likely to recall having seen a targeted advertisement prior to purchase. Yet these differences reflect the environments in which younger consumers circulate rather than a fundamental shift in their understanding of who influences them. Across all age groups, influence remains perceived as primarily self-driven, brand-driven, and relational.

4.3 Answers to Research Questions

The empirical results allow the four research questions to be addressed directly.

RQ1- Who are the main sources of influence in consumers' fashion purchases? Consumers perceive brands and peers as the strongest influencers across the journey. Influencers (~8%) and algorithms (~8%) remain secondary, suggesting that the perceived centre of influence remains strongly human, trusted, and relational (see Table 20, Appendix B)

RQ2- At which stages of the consumer decision journey does each source exert influence?

Influence varies by stage:

- Discovery: dominated by store displays (49.4%) and brand channels (20.5%) (see Figure 5, Appendix D).
- Evaluation: governed by product qualities, brand cues, and peer input
- Purchase: conducted mainly in physical stores (64.5%), marked by rapid and confident action (see Table 1; Table 15; Table 16, Appendix B).
- Post-purchase: focused on personal meaning and quiet engagement rather than sharing (8.4%) (see Table 4, Appendix B).

Across all stages, influencers and algorithms play minimal roles.

RQ3- To what extent do consumers perceive algorithms as intermediaries? Perceived algorithmic influence is low. Only 20.5% recall targeted ads, and only 4% feel "entirely algorithmically influenced." Consumers attribute their choices mainly to themselves, brands, and peers, despite the underlying role of algorithmic curation. (see Figure 9; Figure 10, Appendix D).

RQ4- How do demographic or engagement factors shape influence? Demographic differences affect intensity, not direction. Younger respondents show greater digital exposure, higher validation-seeking, and higher algorithm recall. However, across all groups, brands and peers remain the dominant perceived sources of influence.

5. Discussion

This discussion brings together the insights emerging from the study with the theoretical framework developed in the contextual background and with contemporary industry developments discussed throughout the thesis. By doing so, the discussion highlights why understanding perceived influence matters not only for marketing strategy, but also for how fashion operates as a cultural and social system in a digitally mediated world.

5.1 From Centralised Fashion Authority to Distributed but Human Influence

As outlined in the contextual background, fashion authority has historically been organised through highly centralised structures. Royal figures, couturiers, editors, designers, and forecasting institutions once defined what was fashionable through top-down mechanisms, with little room for interpretation. Digitalization and social media have disrupted this model by redistributing visibility across platforms, brands, influencers, and consumers.

The insights from this study show, however, that this redistribution has not resulted in influence being experienced as impersonal or technologically driven. Consumers overwhelmingly frame influence in human terms. Brands and peers emerge as the most meaningful reference points, with brands identified as the strongest influence by 34.9% of respondents and peers by 23.5%, while influencers and algorithms together account for only around 8%. Although authority is no longer concentrated in a small elite, it has not shifted wholesale to digital systems. Instead, influence has become distributed but remains anchored in relationships, trust, and identity.

5.2 Retail and Brands as Human but Non-Prescriptive Sources of Influence

One of the clearest patterns to emerge from the study concerns the continued importance of physical retail environments. Despite the prominence of digital platforms in fashion discourse, in-store discovery remains the most common entry point into the consumer decision journey, with 49.4% of respondents first encountering their purchased item through physical store displays. This challenges narratives that position algorithms and social media as the dominant gateways to fashion consumption.

The influence of retail today differs fundamentally from that of historical fashion institutions. Rather than operating as authoritative spaces that dictate trends, physical stores function as experiential environments that support exploration and intuitive decision-making. High levels of purchase confidence and rapid decision-making indicate a facilitative, human, and embodied form of influence rather than a prescriptive one. Brands occupy a similarly transformed role, acting as trusted organisers of meaning grounded in design, quality, and alignment with personal style rather than hierarchical authority.

Industry developments reinforce this shift. *The State of Fashion 2026* report by McKinsey & The Business of Fashion highlights that Inditex returned to the top position globally, surpassing both LVMH and Hermès in profitability (Sánchez, 2025). Analysts attribute part of this performance to sustained investment in store experience, including upgraded layouts and premium visual merchandising, confirming physical retail as a strategically powerful site of influence.

5.3 Prosumers, Peers, and the Everyday Circulation of Influence

As discussed in the contextual background, digital platforms have enabled consumers to participate more actively in the circulation of fashion ideas. However, this participation does not primarily take the form of visible content creation or self-identification as influencers.

Instead, influence circulates through everyday social interactions. Friends, family members, and close peers play a central role in validation and reassurance, while sharing purchases publicly remains relatively rare. Consumers may not see themselves as influencing others, yet they contribute to the diffusion of styles through conversation and recommendation.

This perspective helps explain the gap between the rapid expansion of the influencer and creator economy and the limited influence attributed to influencers by consumers themselves. The global influencer marketing market is projected to reach 33 billion USD in 2025 (Navarro, 2025), while the broader creator economy is estimated at around 250 billion USD (Forbes, 2025). Despite this growth, only around 8% of respondents retrospectively attributed their purchase primarily to influencers or algorithmic systems. Influence in contemporary fashion therefore appears to be less aspirational and more relational, operating horizontally across networks of ordinary consumers rather than vertically from highly visible figures.

5.4 Algorithms, Visibility, and Perceived Autonomy

Algorithms undeniably shape the contemporary fashion environment by influencing visibility and exposure. Yet when consumers reflect on their own decision-making, algorithmic influence is rarely foregrounded.

The limited recall of targeted advertisements and the low attribution of influence to algorithms suggest that these systems operate largely in the background of consumer experience. Rather than being recognized as active influencers, algorithms form part of the environment within which choices are made. Consumers continue to describe their decisions in terms of personal preference, brand trust, and social relationships, even when their exposure has been digitally mediated.

This suggests that consumers experience a strong sense of autonomy in their fashion choices, regardless of the technological infrastructures that shape visibility. Understanding this perceived autonomy is crucial for interpreting contemporary consumption, as it highlights how influence can be powerful without being consciously acknowledged.

5.5 Why Perceived Influence Matters for Fashion and Society

Taken together, the insights show that fashion influence today is shaped by digital systems but lived through human experience. Authority has become distributed across networks, yet influence remains grounded in physical spaces, brand meaning, and close social ties. For the fashion industry, this highlights the limits of influence strategies focused solely on visibility and scale, and underscores the importance of approaches that align with how consumers actually recognise and experience influence. At a societal level, the findings underline the continued importance of human judgement, identity, and social connection in a technologically mediated world. By foregrounding the distinction between how influence is structured and how it is perceived, this study contributes to a clearer understanding of contemporary fashion consumption as a relational process embedded in everyday life.

6. Recommendations

6.1 Reassessing the Strategic Value of Influencer Marketing

Fashion brands should reassess the scale and role of influencer marketing within their communication strategies. Given the relatively limited perceived influence of influencers compared to brands, peers, and product-related factors, a more selective approach is advisable. Prioritising credibility, expertise, and alignment with brand values, while strengthening brand storytelling, product communication, and peer-based validation, may better reflect how consumers actually interpret influence.

6.2 Strengthening Store Experience and Retail Visual Merchandising

Brands should continue to invest in physical retail environments as key points of influence within the consumer decision journey. In-store discovery and experience remain central to how consumers encounter and interpret fashion, particularly through visual merchandising, layout, and atmosphere. Strengthening these elements supports intuitive decision-making and reinforces brand identity in a human-centred way, even within a highly digitalised fashion ecosystem.

7. Limitations

Although this study provides valuable insight into how consumers perceive fashion influence in the contemporary digital landscape, several limitations must be acknowledged. First, the sample (while diverse in age and fashion engagement) was modest and non-probabilistic, limiting statistical generalisation. A larger, stratified sample would strengthen representativeness and enable more rigorous comparative analyses.

A second limitation concerns age segmentation. Respondents aged 40 and above were grouped into a single “40+” category, which may conceal meaningful differences between distinct life stages. More granular segmentation would help capture generational nuances in fashion engagement and digital behaviour.

Third, the reliance on self-reported perceptions introduces a limitation in capturing algorithmic influence. Recommendation systems operate largely invisibly, meaning that participants may not fully recognise when or how they are influenced, which may lead self-reported perceptions to underestimate the actual impact of algorithmic curation.

8. Future Research

Taken together, these limitations also provide fertile opportunities for future research. Future studies could incorporate behavioural or trace-based methods, such as analysing social-media feeds or browsing patterns, to compare perceived influence with actual algorithmic exposure and better capture the gap between perceived and structural influence. Research could also examine how physical store experiences interact with online discovery in omnichannel journeys, especially as retailers increasingly integrate digital features into their environments. Finally, exploring how different types of creators (micro, nano, expert, or community-based) shape consumer perceptions would allow a more refined understanding of influencer effectiveness.

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Appendix

Appendix A – Survey overview

I am a Master's student at Nova School of Business and Economics, conducting research for my Master's thesis on *Fashion Influence in the Digital Era*.
This anonymous survey investigates how consumers are influenced when purchasing fashion products- including clothing, footwear, bags, and accessories.
Please answer the questions based on your most recent fashion product purchase within the last twelve months.
The survey takes approximately 7 minutes. All responses are confidential and used exclusively for academic purposes.

Section 1- The Purchase Context

1. What type of *fashion product* did you last purchase?

☐ Clothing item (e.g., shirt, dress, trousers)
☐ Footwear (e.g., shoes, sneakers, boots)
☐ Bag (e.g., handbag, backpack)
☐ Fashion accessory (e.g., jewellery, sunglasses, belt, scarf)
☐ Other (please specify) _____________

2. Was the fashion product you purchased new or pre-owned?

☐ New collection item
☐ Vintage or second-hand item

3. How did you first become aware of this fashion product?

☐ Social media (e.g., Instagram, TikTok, Pinterest)
☐ Brand website or newsletter
☐ Physical store display
☐ Friend or peer suggestion
☐ Online advertisement or platform recommendation
☐ Offline or event-based context (fashion show, party, dinner)
☐ Other (please specify) _____________

4. Who most influenced or intermediated your discovery of this product (regardless of the channel)?

☐ Designer or brand
☐ Retailer or stylist
☐ Influencer or content creator
☐ Friend or peer community
☐ Algorithmic recommendation (e.g., "For You" page, targeted ad)
☐ Store display/ in-store experience
☐ Other (please specify) _____________

Section 2- Evaluation and Motivation

5. How many times did you see or hear about this fashion product?

☐ Never, I bought it immediately after discovering it

☐ Once

☐ 2-3 times

☐ 4-6 times

☐ More than 6 times

6. Which of the following best describes what motivated you to buy this fashion product?

☐ Desire to follow a current fashion trend

☐ Appreciation of its design or quality

☐ Connection with the brand identity or story

☐ Influence from peers or social networks

☐ High online visibility or media exposure

☐ Sustainability or ethical values

☐ Practical need or replacement (e.g., I needed a similar item)

☐ Other (please specify) _____________

7. To what extent did the following influence your decision to buy this fashion product?

(1 = Not at all influential, 5 = Very influential)

- Designers or brands 1 2 3 4 5
- Retailers or stylists 1 2 3 4 5
- Influencers or content creators 1 2 3 4 5
- Friends or peers 1 2 3 4 5
- Social-media algorithms or platform recommendations 1 2 3 4 5

8. Which digital platforms most influenced your purchase of this fashion product?

☐ Instagram

☐ TikTok

☐ Pinterest

☐ YouTube

☐ Brand website

☐ E-commerce platform (e.g., Farfetch, Zalando, Zara)

☐ None

☐ Other (please specify) _____________

9. How important were the following factors when evaluating or deciding to buy this fashion product?

(1 = Not important, 5 = Extremely important)

- Aesthetic appeal 1 2 3 4 5
- Price 1 2 3 4 5
- Brand reputation 1 2 3 4 5
- Trend relevance 1 2 3 4 5
- Sustainability or ethics 1 2 3 4 5
- Online visibility and exposure 1 2 3 4 5

Section 3- Purchase Experience

10. Where did you purchase this fashion product?

☐ Brand or retailer's online store

☐ Physical store or boutique

☐ Second-hand platform (e.g., Vinted, Depop, Vestiaire Collective)

☐ Social-media marketplace (e.g., Instagram Shop, Facebook Marketplace)

☐ Other (please specify) __________

11. How soon after first discovering the product did you make the purchase?

☐ Immediately (same day)

☐ Within 1-3 days

☐ Within 4-10 days

☐ Within 11-30 days (about 2-4 weeks)

☐ After more than a month

12. How confident were you in your purchase decision?

(1 = Not confident at all, 5 = *Very confident*)

1 2 3 4 5

13. Did you seek validation or feedback before buying this fashion product (e.g., opinions, likes, or reviews)?

☐ Yes

☐ No

14. *(If yes)* Whose validation did you seek? (Select all that apply)

☐ Friends or peers

☐ Influencers

☐ Online community

☐ Retail or stylist advice

☐ Product reviews or ratings

Other

Section 4- Post-Purchase Reflection and Engagement

15. After purchasing this fashion product, did you share or post it online (e.g., Instagram, TikTok)?

☐ Yes

☐ Not yet, but I plan to

☐ No

16. How did owning this fashion product make you feel?

(1 = Not at all, 5 = Very strongly)

- Expressive of my identity 1 2 3 4 5
- Trend-aligned 1 2 3 4 5
- Authentic or meaningful 1 2 3 4 5
- Influenced by others' feedback 1 2 3 4 5

17. To what extent do you believe this purchase was influenced by algorithms rather than people?

(1 = Entirely human influence, 5 = *Entirely algorithmic influence*)

1 2 3 4 5

18. Did the product appear in a personalized feed or targeted ad before you bought it?

☐ Yes

☐ No

☐ Unsure

19. After purchasing this fashion product, did you continue following or engaging with the person, brand, or source that most influenced your decision?

☐ Yes, more actively

☐ Occasionally

☐ No longer
☐ Not applicable
20. Looking back on the entire process, who do you think had the strongest influence on your purchase?
☐ Designer or brand
☐ Retailer or stylist
☐ Influencer or content creator
☐ Peer or friend
☐ Algorithm or platform
21. Do you think this purchase process reflects how you usually buy fashion products?
☐ Yes
☐ No
☐ Partially
Final Open Question
22. In your own words, what most influences your fashion purchases today?
Section 5- Demographics
Age group
☐ Under 20
☐ 20-29
☐ 30-39
☐ 40+
Gender
☐ Female
☐ Male
☐ Non-binary
☐ Other
☐ Prefer not to say
Education level
☐ High school ☐ Bachelor's degree ☐ Master's degree ☐ Doctorate ☐ Other
Country/Region
☐ Portuguese
☐ Spanish
☐ French
☐ Italian
☐ German
☐ British
☐ Other (please specify) ______________
Occupation
☐ Student
☐ Fashion professional (e.g., designer, stylist, buyer, marketer, etc.)
☐ Professional in another field (please specify) _____________
☐ Not currently employed
☐ Retired
☐ Other (please specify) ______________

Approximate number of Instagram followers
☐ <500 ☐ 500-2,000 ☐ 2,000-10,000 ☐ 10,000+
How would you rate your interest in fashion?
(1 = Not interested, 5 = *Highly interested*)
1 2 3 4 5
Average number of fashion products purchased per month
☐ 0-1
☐ 2-4
☐ 5 or more

Appendix B- Descriptive Tables of survey results

Table 1- Purchase Confidence (Q12)

MEAN	MEDIAN	ST. DEVIATION	N
4,26	4	0,907415396	166

Table 2- Validation Seeking before purchase (Q13)

OPTION	COUNT	% RESPONDENTS
No	92	55,4%
Yes	74	44,6%
Total	166	

Table 3- Source of Validation before purchase (Q14)

OPTION	COUNT	% RESPONDENTS
Friends or peers	64	**71,9%**
Product reviews or ratings	12	13,5%
Online Community	4	4,5%
Retail or stylist advice	4	4,5%
Influencers	1	**1,1%**
Parents	2	2,2%
Real life photos of the product	1	1,1%
Family	1	1,1%
TOTAL RESPONDENTS	89	

Note (Q14): Total selections exceed total respondents (n = 74) who answered "Yes" because multiple sources of validation could be selected.

Table 4- Sharing Product online after purchase (Q15)

OPTION	COUNT	% RESPONDENTS
Yes	14	8,4%
No	149	89,8%
Not yet, but i plan to	3	1,8%
TOTAL	166	

Table 5- Continue Engagement with influencing source (Q19)

OPTION	COUNT	% RESPONDENTS

Occasionally	76	45,8%
Not applicable	49	29,5%
Yes, more actively	30	18,1%
No longer	11	6,6%
TOTAL RESPONDENTS	166	

Table 6. Product Category Purchased (Q1)

OPTION	COUNT	% RESPONDENTS
Clothing Item	117	70,5%
Footwear	35	21,1%
Bag	5	3,0%
Fashion accessory	9	5,4%
TOTAL	166	

Table 7. Product Type Purchased (Q2)

OPTION	COUNT	% RESPONDENTS
New collection Item	150	90,4%
Vintage or second hand Item	16	9,6%
TOTAL	166	

Table 8. First Discovery Channel of the Product (Q3)

OPTION	COUNT	% RESPONDENTS
Physical store display	82	49,4%
Brand website or newsletter	34	20,5%
Social media (e.g., Instagram, TikTok, Pinterest)	28	16,9%
Friend or peer suggestion	9	5,4%
Online advertisement or platform recommendation	6	3,6%
Offline or event-based context (fashion show, party, dinner)	4	2,4%
Search for this item type online	1	0,6%
Second hand Platform searches	1	0,6%
scond hand platform	1	0,6%
TOTAL	166	

Table 9. Actor Responsible for Product Discovery (Q4)

OPTION	COUNT	% RESPONDENTS
Designer or brand	40	24,1%
Retailer or stylist	14	8,4%
Influencer or content creator	13	7,8%
Friend or peer community	23	13,9%
Algorithmic recommendation (e.g., "For You" page, targeted ad)	12	7,2%
Store display/ in-store experience	62	37,3%
Product keywords matching search	1	0,6%
Store display and availability	1	0,6%
TOTAL	166	

Table 10. Prior Familiarity With the Product (Q5)

OPTION	COUNT	% RESPONDENTS
Never- I bought it immediately after discovering it	73	44,0%
Once	15	9,0%
2-3 times	46	27,7%
4-6 times	14	8,4%
More than 6 times	18	10,8%
TOTAL	166	

Table 11. Main Reason for Purchasing the Product (Q6)

OPTION	COUNT	% RESPONDENTS
Appreciation of its design or quality	91	54,8%
Practical need or replacement (e.g., I needed a similar item)	41	24,7%
Desire to follow a current fashion trend	18	10,8%
Connection with the brand identity or story	7	4,2%
Sustainability or ethical values	4	2,4%
Influence from peers or social networks	3	1,8%
High online visibility or media exposure	2	1,2%
TOTAL	166	

Table 12. Influence Ratings Across Key Actors (Q7)

OPTION	SUM	MEAN INFLUENCE (1- 5)
Designers or brands	512	3,084337349
Friends or peers	473	2,84939759
Retailers or stylists	418	2,518072289
Social-media algorithms or platform recommendations	404	2,43373494
Influencers or content creators	377	2,271084337
TOTAL RESPONDENTS	166	

Table 13. Digital Platforms Influencing the Purchase (Q8)

OPTION	COUNT	% RESPONDENTS
None	62	37,3%
Instagram	33	19,9%
TikTok	25	15,1%
Brand website	17	10,2%
E-commerce platform (e.g., Farfetch, Zalando, Zara)	16	9,6%
Pinterest	12	7,2%
Stockx	1	0,6%
TOTAL	166	

Table 14. Main Reason for Purchasing the Product (Q9)

OPTION	SUM	MEAN INFLUENCE (1- 5)

Aesthetic appeal	737	4,439759036
Price	645	3,885542169
Brand reputation	551	3,319277108
Trend relevance	470	2,831325301
Sustainability or ethics	450	2,710843373
Online visibilty and exposure	353	2,126506024
TOTAL RESPONDENTS	166	

Table 15. Place of Purchase (Q10)

OPTION	COUNT	% RESPONDENTS
Physical store or boutique	107	64,5%
Brand or retailer's online store	41	24,7%
Second-hand platform (e.g., Vinted, Depop, Vestiaire Collective)	13	7,8%
Social-media marketplace (e.g., Instagram Shop, Facebook Marketplace)	2	1,2%
Stockx	1	0,6%
My Theresa market place	1	0,6%
Second hand store	1	0,6%
TOTAL	166	

Table 16. Digital Platforms Influencing the Purchase (Q11)

OPTION	COUNT	% RESPONDENTS
Immediately (same day)	71	42,8%
Within 1–3 days	33	19,9%
Within 4–10 days	28	16,9%
After more than a month	20	12,0%
Within 11–30 days (about 2–4 weeks)	14	8,4%
TOTAL	166	

Table 17. Feelings Associated With Owning the Product (Q16)

OPTION	SUM	MEAN INFLUENCE (1- 5)
Expressive of my identity	589	3,548192771
Authentic or meaningful	542	3,265060241
Trend-aligned	508	3,060240964
Influenced by others' feedback	385	2,319277108
TOTAL RESPONDENTS	166	

Table 18. Human-Algorithm Influence Scale (Q17)

OPTION	COUNT	% RESPONDENTS	MEAN	ST.DEVIATION
1	58	34,9%	2,29518072	1,166544092
2	32	19,3%		
3	51	30,7%		
4	19	11,4%		
5	6	3,6%		
TOTAL RESPONDENTS	166			

Table 19. Targeted Ad or Personalised Feed Recall (Q18)

OPTION	COUNT	% RESPONDENTS
Yes	34	20,5%
No	106	63,9%
Unsure	26	15,7%
TOTAL RESPONDENTS	166	

Table 20. Retrospective Strongest Source of Influence (Q20)

OPTION	COUNT	% RESPONDENTS
Designer or brand	58	34,9%
Peer or friend	39	23,5%
Retailer or stylist	27	16,3%
Algorithm or platform	14	8,4%
Influencer or content creator	14	8,4%
needs	1	0,6%
Family	1	0,6%
Only me	1	0,6%
The product itself- don't forget that it's not only the designer, brand, retailers but also how appealing the Product is (across different dimensions or attributes)	1	0,6%
Because I like	1	0,6%
Individual choice	1	0,6%
I bought it only because I liked it, but I defensively wouldn't have seen it if my father hadn't pointed it out	1	0,6%
trending	1	0,6%
personal style	1	0,6%
me liking it at the store	1	0,6%
The product it self	1	0,6%
Convenience.	1	0,6%
Just like it	1	0,6%
My Capsule wardrobe saw in feeds	1	0,6%
TOTAL RESPONDENTS	166	
Sum of other	14	8,4%

Note (Q20): Open-ended responses were grouped under 'Other' for analytical clarity.

Table 21. Reflection in Buying Fashion (Q21)

OPTION	COUNT	% RESPONDENTS
Yes	104	62,7%
No	23	13,9%
Partially	39	23,5%
TOTAL RESPONDENTS	166	

Table 22. Summary of the Demographics

Category	Subgroup	Count	Percentage

Gender	Female Male Non-binary	132 33 1	79,5% 19,9% 0,6%
Age	Under 20 20-29 30-39 40+	18 82 7 59	10,8% 49,4% 4,2% 35,5%
Nationality	Portuguese Spanish French Serbian Swiss	147 16 1 1 1	88.6% 9.6% 0,6% 0,6% 0,6%
acesOccupation	Professional in another field Student Fashion professional Retired Not currently employed	82 56 15 9 4	49,4% 33,7% 9% 5,4% 2,4%
Fashion interest	Low Medium High	19 52 95	11,4% 31,3% 57,2%
Education Level	Master's degree Bachelor´s degree High school Doctorate Other	74 65 19 5 3	44,6% 39,2% 11,4% 3,0% 1,8%
Nº Instagram Followers	<500 500-2,000 2,000-10,000 10,000+	87 64 12 3	52,4% 38,6% 7,2% 1,8%
Average nº products/month	2–4 0–1 5+	89 63 14	53,6% 38,0% 8,4%

Appendix C- Open ended responses
Figure 1- Thematic Summary of Open-Ended Responses

THEMES	REPRESENTATIVE ESPRESSIONS (EXAMPLES)	COUNT	% OF RESPONDENTS
Personal style/ Identity/Self expression	“My own style”, “O meu estilo pessoal”, “Expressing myself”	40	24,1%
Design/Aesthetics	“Good design”, “If I like the design (…)”, “Looks and price”	38	22,9%
Quality	“Quality of the products (…)”, "quality/price relation"	36	21,7%
Price	“The price”, “(…) if the price is reasonable”, “money”	33	19,9%
Trends	“Trends”, “seeing other people wearing them in public”, “(…) whats in style”	16	9,6%
Social Media/Influencers/Algorithms	“TikTok”, “Social media”, “Internet algorithms”, “Pinterest”	24	14,5%
Peers and Family	“the opinion of my friends and family ”, “Feedback from my family when I'm not sure if I should buy a product.”	6	3,6%
Need/Practicality/Comfort	“What I really need (…) ”, “Comfort and practicality of the item", “(…) versatility”	33	19,9%
Brand	“Brand and quality", "(…) if it’s a good brand", "(…) design of the brand (…)"	10	6,0%
Sustainability	“(…) try to be more consciuous (…)”, "(…) sustainability (…)", " The use of natural materials/fibers (…)"	8	4,8%
Store Experience/Physical store	“(…) the arrangement of the store.”, “physical stores” , "It’s in store presentation (…)"	6	3,6%
Timeless	“(…) what I think it’s timeless”, “ (…) being timeless”, “(…) timeless in a world full of trends”	5	3,0%
Total Respondents		166	

Appendix D- Figures Used in the Analysis
Figure 1- Rogers's S-shaped Diffusion Curve. (Source: Rogers 1995)

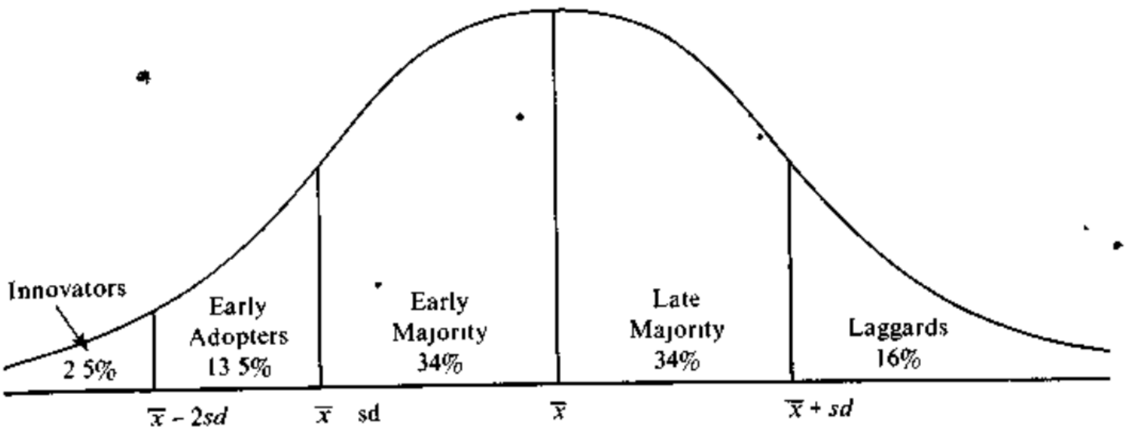

Figure 2- Revised Fashion Adoption Curve (Source: Workman and Lee, 2017)

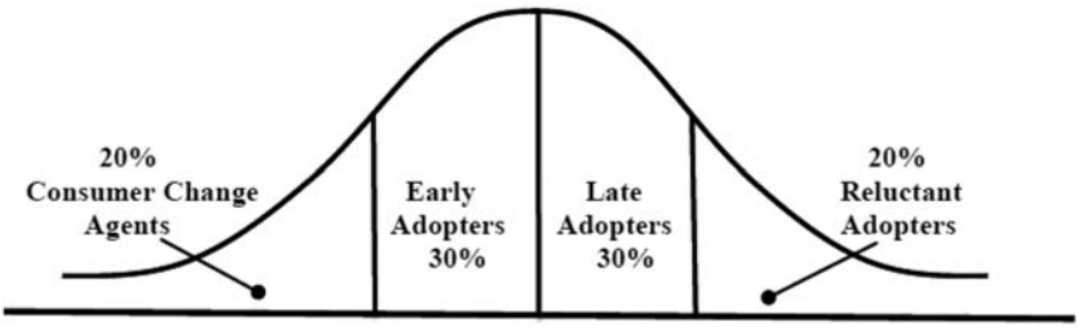

Figure 3- The consumer decision journey (Source: Mckinsey, 2009)

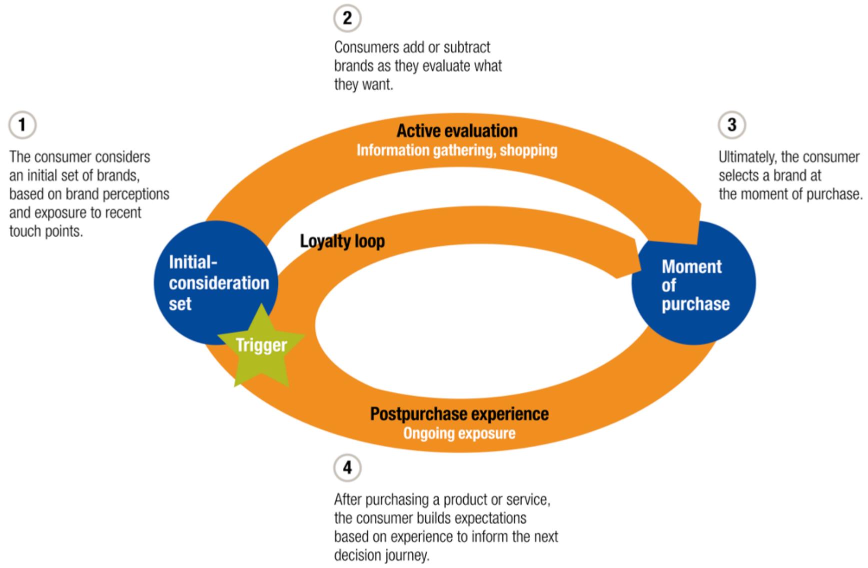

Figure 4- The new consumer decision journey (Source: Mckinsey, 2015)

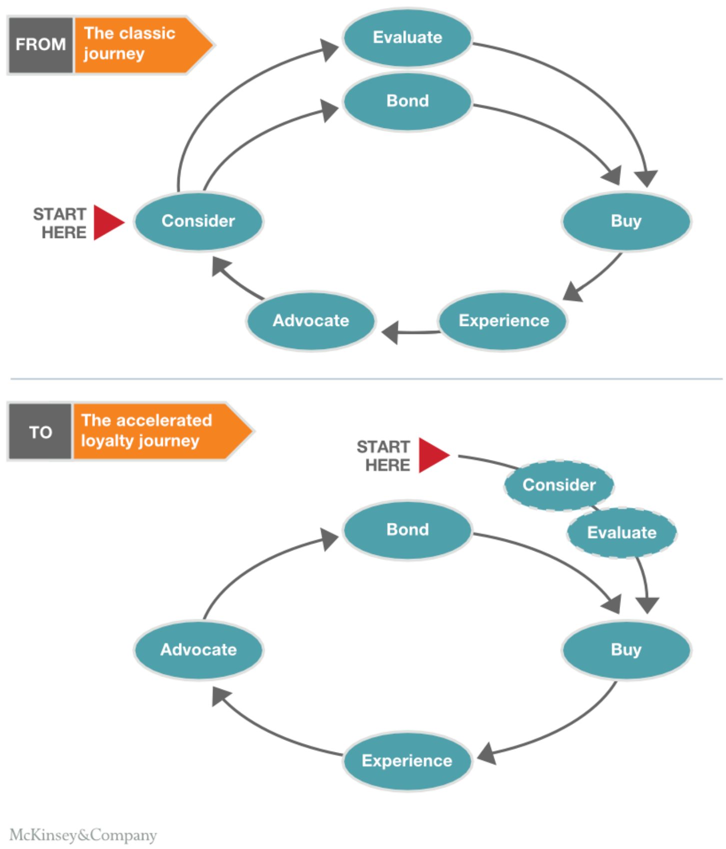

Figure 5- Discovery Channels (Q3)

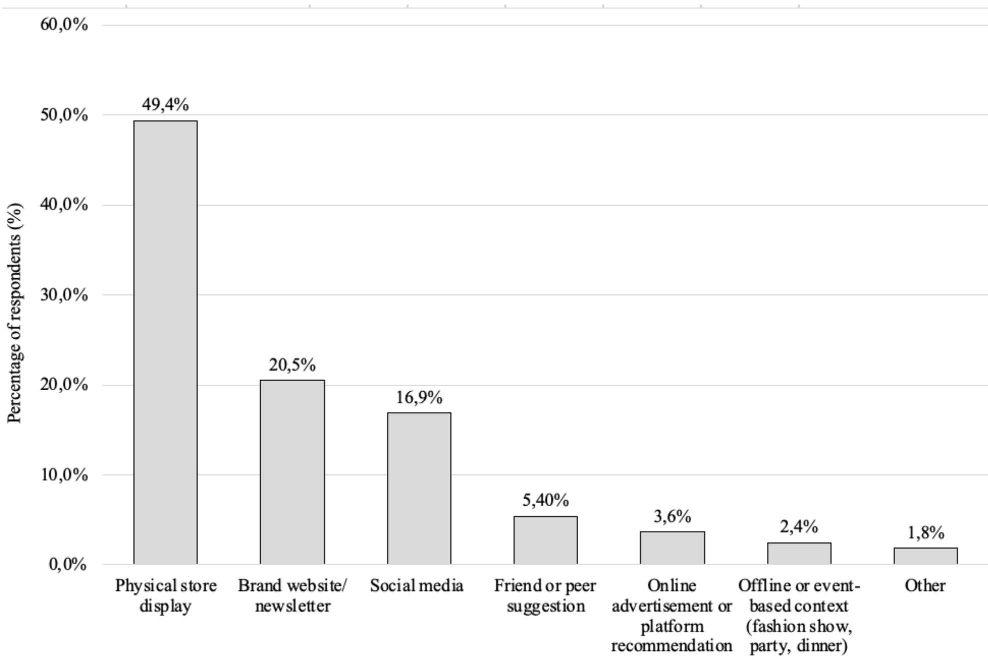

Figure 6- Motivation to buy (Q6)

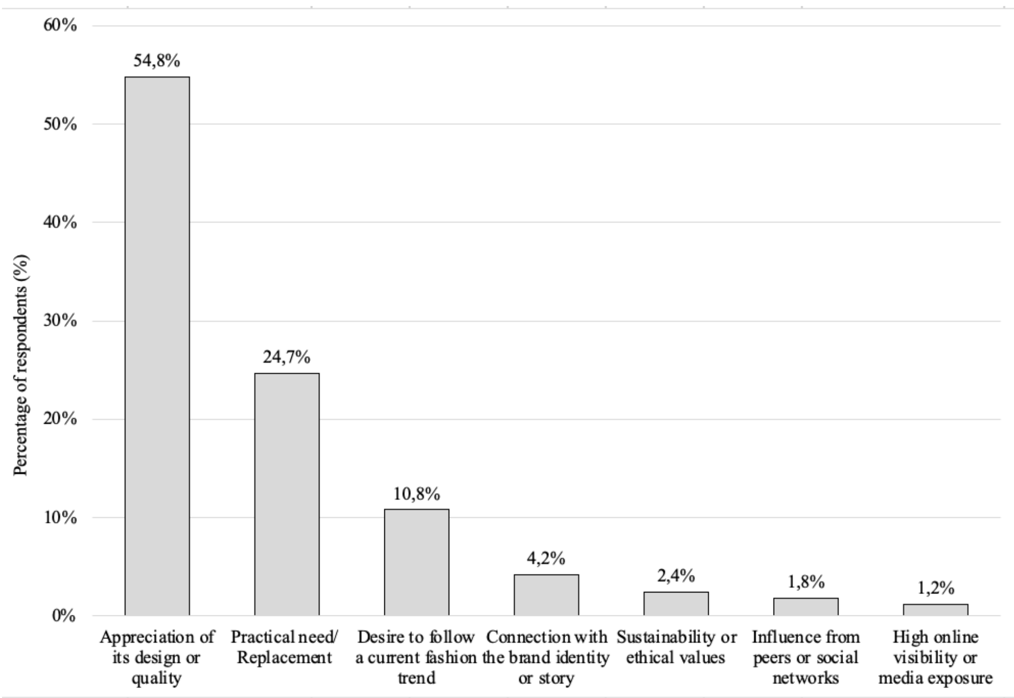

Figure 7- Influence (Q7)

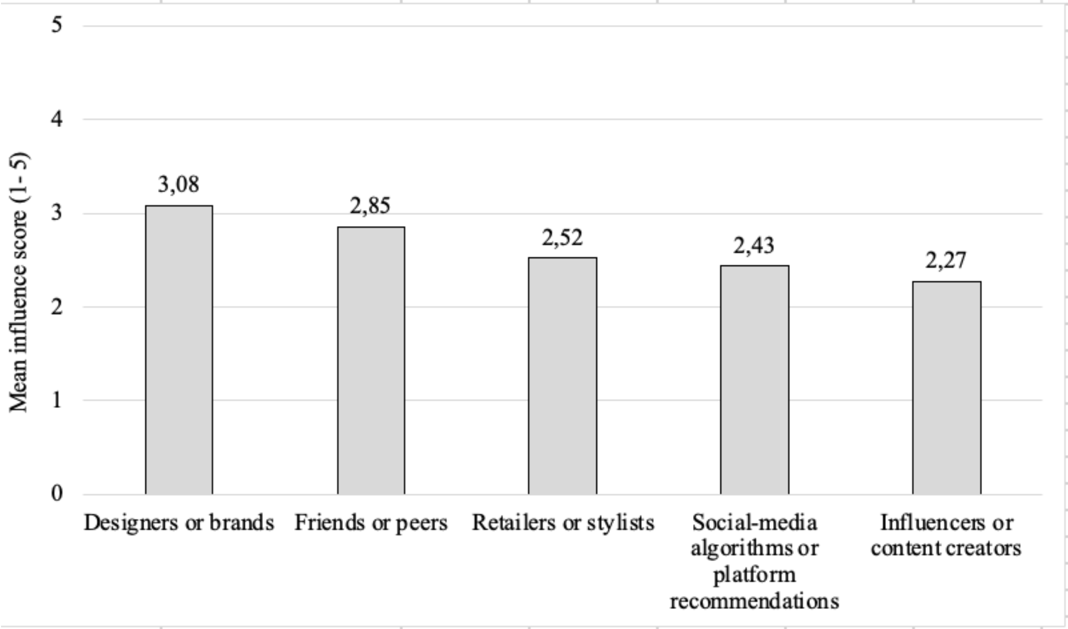

Figure 8- Strongest Influence (Q20)

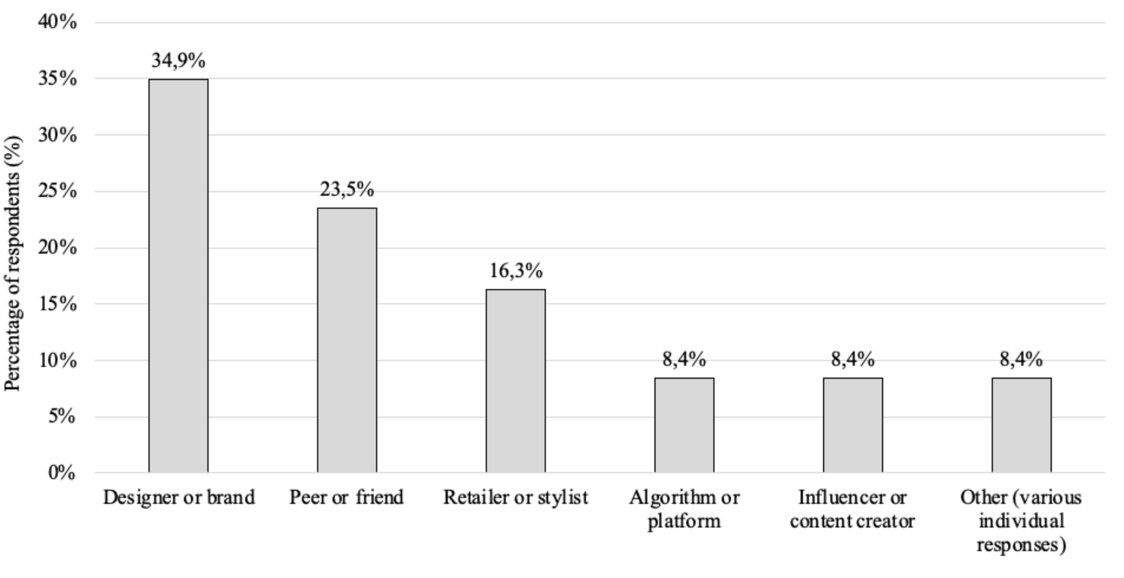

Figure 9. Algorithmic vs Human Influence (Q17)

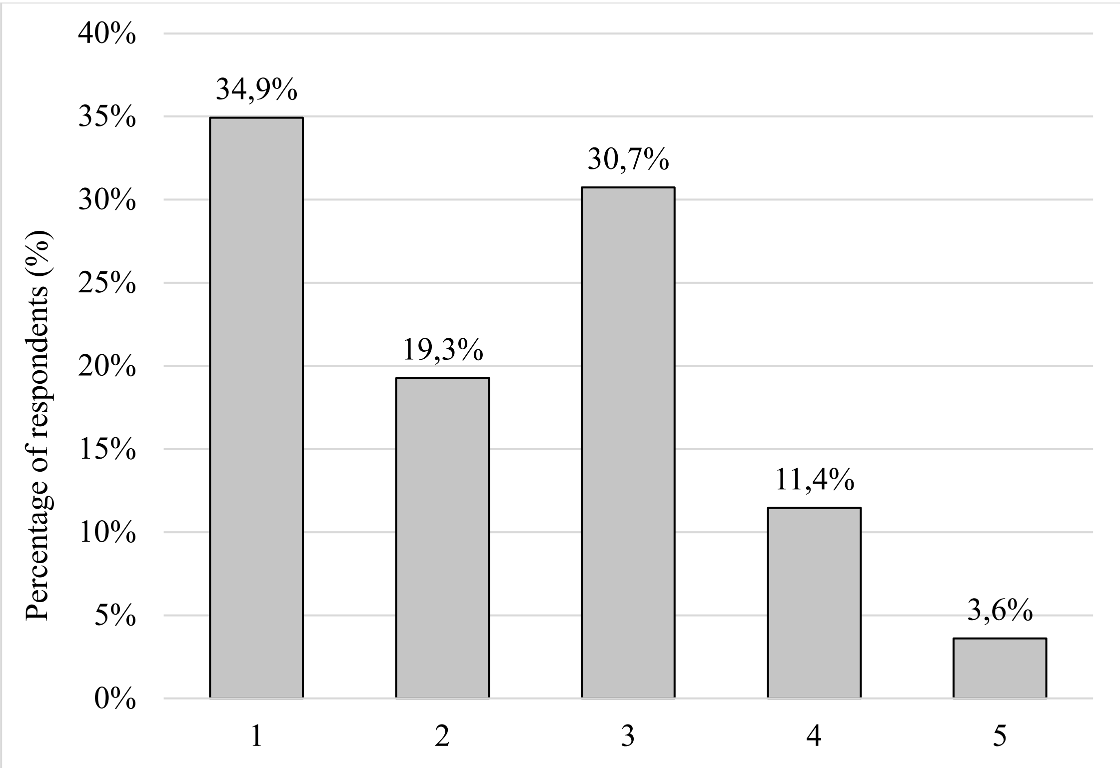

Figure 10. Influence by Targeted Ad (Q18)

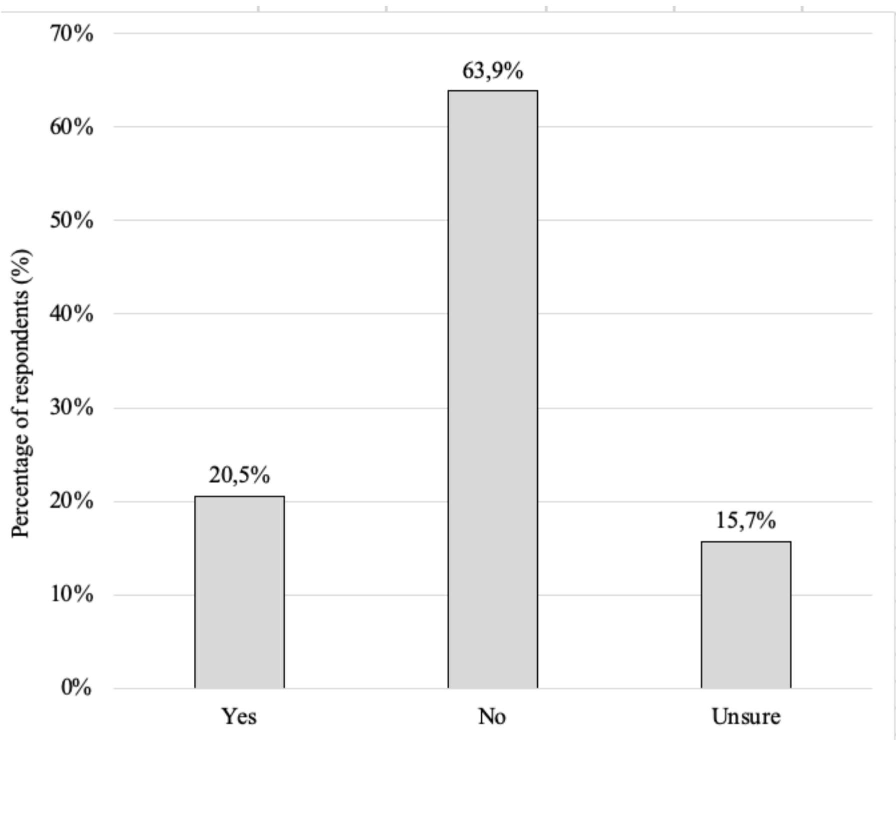

Figure 11- Purchase Timing (Q11)

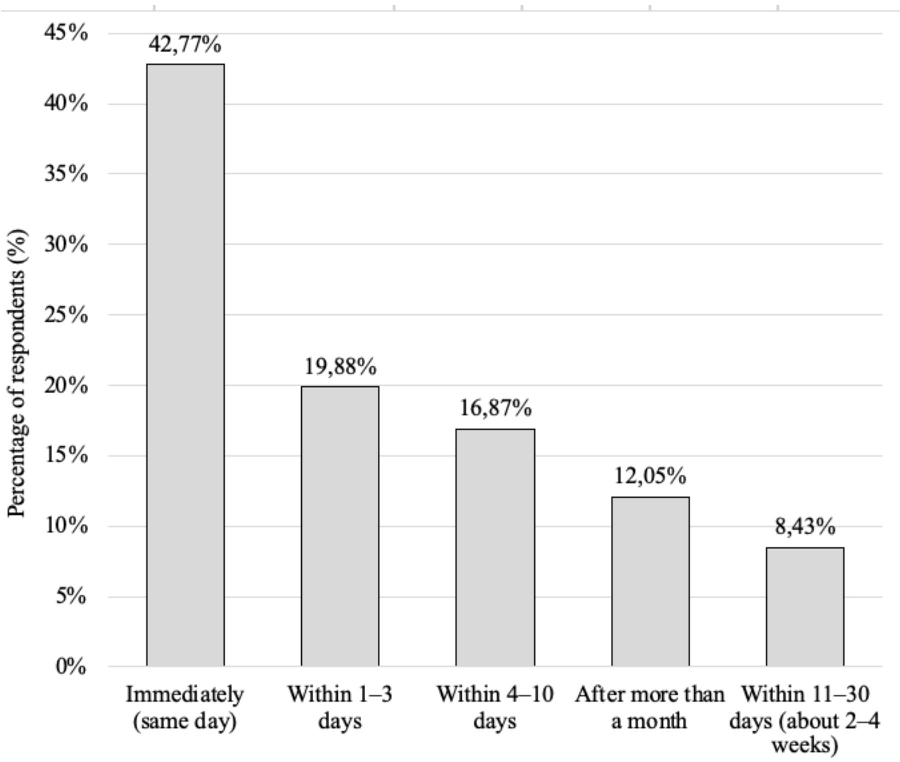

Figure 12- Statista Influencer Market Size