

**HOW SLOW SHOULD SLOW FASHION BE? THE
PERCEPTIONS OF SLOW FASHION STAKEHOLDERS
ON THE DISTRIBUTION OF APPAREL**

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Master's Thesis

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ABSTRACT

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<p>Abstract:</p> <p>The apparel industry is booming. Every year, 62 million tonnes of apparel are consumed globally, and shopping apparel is even considered a leisure activity. However, with reoccurring criticism of the negative impacts of the fashion industry, concepts like slow fashion are increasingly becoming mainstream as they address the increasing concern from consumers for environmental protection, social responsibility, and economic sustainability.</p> <p>However, research on the challenges for slow fashion companies to align their supply with product strategies is still scarce. In detail, the focus of this thesis is on the distribution of apparel depending on the demand patterns. Thus, the literature review focuses on the current research of slow fashion and which demands retailers, brands and customers have for a distribution system. Previously, the rapid change and volatile demand in the fashion industry was successfully met by fast fashion brands with an agile supply chain. However, it is questionable if this supply chain is applicable for slow fashion with the rise of ethical consumerism and its aversion to oversupply. Therefore, the focus of this Master's Thesis is on different slow fashion stakeholders' perceptions on the distribution of apparel to deliver more insights on this issue.</p> <p>The research data was collected through semi-structured interviews with 10 stakeholders of the fashion industry (brand manager, supply manager, retailers) and qualitatively analysed with <i>Open coding</i>.</p> <p>The research indicates that slow fashion stakeholders identify the <i>NOS System</i> and the <i>Seasonal System</i> as more beneficial for the slow fashion industry depending on the product strategy. In detail, interviewed slow fashion brands which aimed to offer higher quality apparel with long-term design perceived the <i>NOS System</i> to be more beneficial. Slow fashion brands which aimed to bring slow fashion to the mainstream market regard the <i>Seasonal System</i> to be more beneficial for the slow fashion industry.</p>	
Keywords: slow fashion, distribution systems, supply chain, fashion industry, sustainability	
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1 INTRODUCTION

In 2018, the Intergovernmental Panel on Climate Change (IPCC) stated that the fashion industry produces 10% of global carbon dioxide emissions annually, making it one of the main industries to contribute to an excelled climate change. Additionally, the industry is responsible for approximately 35% of oceanic primary plastic pollution worldwide, 92 million tonnes of textile waste, and uses every year 1.5 trillion litres of water (Niinimäki et al., 2020; Presley & Meade, 2018). However, the apparel industry is booming. Every year, 62 million tonnes of apparel are consumed globally, and shopping apparel is even considered a leisure activity (Niinimäki, Peters, Dahlbo, Perry, Rissanen, & Gwilt, 2020; De Brito, Carbone, & Blanquart, 2008).

Fast fashion has changed the fashion industry in terms of consumption, speed, and distribution since the 1990s fundamentally (Kim, Choo, & Yoon, 2013). The reason why the fashion industry grew so distinctively is an optimisation of an agile supply chain by fast fashion brands which perfectly serves the rapid change and volatile demand that defines this industry. However, with reoccurring criticism of the negative impacts of the fashion industry, concepts like slow fashion are increasingly becoming mainstream as they address the increasing concern of consumers for environmental impact, social responsibility, and sustainable economic growth (Herringer et al., 2015; Yang, Song, & Tong, 2017; Presley & Meade, 2018; Ertekin & Atik, 2015).

Existing research agrees: An optimised supply chain is a key element for being successful in the fashion industry (Sharma, Iyer, Mehrotra, & Krishnan, 2010; Moretto, Macchion, Lion, Caniato, Danese, & Vinelli, 2018; Yang et al., 2017). However, research on the challenges for slow fashion companies to align their supply with product strategies is still scarce. This study aims at providing more insights into the issue of how slow fashion can optimise their distribution systems to gain a competitive advantage with a rising demand for sustainable goods. In detail, it is questionable if an agile supply chain is the most profitable supply chain for slow fashion with the rise of ethical consumerism and its aversion to oversupply (McNeill & Snowdon, 2019; Pookulangara & Shephard, 2013).

While the main research on slow fashion has been focused on a supply chain which integrates ethical conduct, produces quality rather than quantity, and has reduced production overall, the perceptions of customers and retailers on the distribution of apparel have been neglected. Slow fashion emerged from ethical consumerism and tries to counteract issues of fast fashion by considering various stakeholder needs such as the desire for environmental protection, social responsibility, and economic sustainability (Goworek, Oxborrow, Claxton, McLaren, Cooper, & Hill, 2018). Since sustainability became a megatrend, sustainable fashion has increasingly become mainstream and the demand for sustainable goods has risen (Watson & Yan, 2013; Mora, Rocamore & Volonté, 2014).

Thus, effective and suitable supply chains need to be created in the slow fashion industry to fulfil demand and to upkeep the integration of sustainable processes. However, it is of question if the agile supply chain in the traditional fashion industry is the most beneficial supply chain for slow fashion. Slow fashion distanced itself already from the quick-response supply chain by offering a maximum of four collections per year in comparison to twenty collections offered by the fast fashion industry annually (Goworek et al., 2018; Watson & Yan, 2013). In some cases, slow fashion brands even decided to go further by not offering *Seasonal Ware* at all and refrain from introducing new apparel every year by keeping the same product portfolio for several years. However, this study shows the perceptions of slow fashion retailers and customers and explores the reasons for brands to decide on the distribution system.

In detail, the focus of this thesis is on the distribution of functional and innovative products. Fisher (1997) coined this distinction of products based on the demand patterns. He stated that functional products satisfy basic demands and have among other features a long-life cycle. In slow fashion, this is realised by brands offering a *Never out of Stock (NOS) System* from which retailers can order apparel the whole year round depending on the demand of their customers. By offering the product long-term, the focus can be put on cost reduction and improved quality. In contrast, an innovative product is defined by Fisher (1997) as having a volatile demand and a shorter life cycle. This is implemented by slow fashion brands through the *Seasonal System* which includes seasonal collections and a pre-order system restricted to a maximum of four times a year to predict the demand accurately and to avoid oversupply. Therefore, both distribution systems have advocates who claim that their distribution system is more adequate and profitable for slow fashion products. Thus, slow fashion stakeholders of retailers, brands and customers were interviewed on their perceptions of the *NOS System* and the *Seasonal System* in this Master's Thesis. In general, brands decide on their distribution system, however, this study also includes insights from retailers on which distribution system is more beneficial and accepted among their customers as they have a valuable insight into the needs and demands of slow fashion customers.

The motivation for conducting this research is based on personal interest in sustainability and the fashion industry and a collaboration with the slow fashion shop *umgekremfelt* in Mannheim, Germany. Since 2015, *umgekremfelt* offers slow fashion in Mannheim and initiated this master's thesis as the dispute about the most beneficial distribution system is held for years in the slow fashion industry. Thus, the company's interest originates from the industry's lack of knowledge on the topic as well as from the company's aim to educate slow fashion customers in presentations and events about slow fashion and sustainability. The company supported this research by providing business contacts, giving an interview and commenting on the results found. Thus, *umgekremfelt* helped substantially to conduct this Master's Thesis and to collect valuable insights about

the slow fashion industry and the distribution systems. The structure and the key concepts of this study are presented in the following paragraph.

This Master's Thesis investigates how different stakeholders of the slow fashion industry perceive the distribution of apparel to gain more insights into the topic. Thus, this study first presents current research on slow fashion in general, its distribution systems, retailers and customers. In detail, this thesis establishes the main characteristics of slow fashion, its differences compared to green fashion or sustainable fashion, and additionally evaluates the current state of research on the topic. Furthermore, this study shows the differing demands for slow fashion and fast fashion. A focus is on the quality of apparel and a potential scarcity effect as Watson and Yan (2013) found that slow fashion customers focus more on quality than fast fashion customers. Additionally, research suggests that conscious customers are more sensitive than regular customers about an increased turnover and are tired of chasing trends (McNeill & Snowdon, 2019; Pookulangara & Shephard, 2013). Resulting from this, the conclusion is drawn that a different distribution system seems to be needed in the slow fashion industry, based on Fisher's (1997) statement that physically identical objects can have different demands and thus need different supply chains. Last of all, the scarcity effect, which is the human-induced shortage of a product and results in an urgency to buy for the consumer and ultimately increased sales figures, is one of the key ingredients for the growth of the fashion industry (Gierl, Plantsch, & Schweidler, 2008; Gupta, 2012). It needs to be evaluated what effect the scarcity effect might play in the sales of slow fashion apparel. Thus, this Master's Thesis contributes to literature and practice by investigating three research questions:

R1: How do retailers, brands, and customers perceive the distribution of functional and innovative products?

R2: What effect has the quality of apparel on increased sales according to brands, retailers, and customers of slow fashion?

R3: What effect have the scarcity effect and discounts on increased sales according to brands, retailers, and customers of slow fashion?

After reviewing the literature, interviews with key stakeholders of the slow fashion industry were conducted for in-depth insights on the distribution systems of apparel. The methodology chosen to gain more knowledge were semi-structured interviews with 10 stakeholders of the slow fashion industry in Germany. A focus is on brands which use either of the two distribution systems of apparel, namely the *NOS System* and the *Seasonal System* as well as retailers and their insights on their customer bases' perception and consumption. The qualitative methodology is especially suiting for exploring conceptually and empirically underdeveloped phenomena (Stanton & Guion, 2010) as well as holistically discovering inner parameters associated with motivations, recognition, attitudes, and experiences (Kim & Lee, 2015). Therefore, the qualitative methodology is appropriate for studying perceptions, attitudes, and behaviours regarding slow

fashion. This process ensures the collection of meaningful data as participants are encouraged to reflect upon their own experiences. The interviews were recorded with prior approval from participants and analysed with the *Open coding* method.

By answering these research questions, this Master's Thesis provides in-depth insights about the distribution systems of apparel through insights into key stakeholders of the slow fashion industry. Discussing the knowledge gained through participants' lived experience secures depth, rather than generalisability. Reliability is secured from exposure to multiple views.

Ertekin and Atik (2015) state that the current fashion system poses a threat to the quality of life of future generations. Therefore, it is time to gain more insights into how the slow approach in the fashion industry can gain more competitive advantage through their distribution system. The next chapter introduces common definitions of sustainability and how fast fashion opposes it.

2 THEORETICAL FRAMEWORK

The most common sustainability definition is the Brundtland definition which states that sustainability is achieved if the current needs of today's population are met without endangering the ability of the future population to meet their needs (World Commission on Environment and Development, 1987). This definition can be seen as normative, as a world where the whole population has their needs fulfilled constantly is not realistic (Broman & Robèrt, 2015). However, there is a consensus in the international debate that an analytical consideration of sustainability should include, beyond the ecological aspect, a social and economic aspect. A conceptual framework which includes these three aspects can be found in the concept known as the sustainability triangle even though met with increasing criticism, as it is not based on a system-theoretical model (Fues, 1998). Accordingly, the individual dimensions in the so-called sustainability triangle are regarded as equally important elements, which means that the individual environmental, economic, and social dimensions are equivalent, functionally independent sub-areas between which substitution possibilities exist (Pufé, 2012). Thus, it can be critically remarked that losses in one dimension must be compensated by gains in another. The economic dimension aims, among others, for economic efficiency and efficient use of resources, whereas the social dimension aims for well-being, social justice, and equitable distribution of resources. Lastly, the ecological dimension aims for responsible behavior towards the environment and limiting the consumption of resources. However, the sustainability triangle, among others, is criticised to depict the ecological, social and economic aspect as independent from each other. For instance, Herath and Rathnayake (2019) state that environmental development cannot be separated from human development as most resources used come from nature.

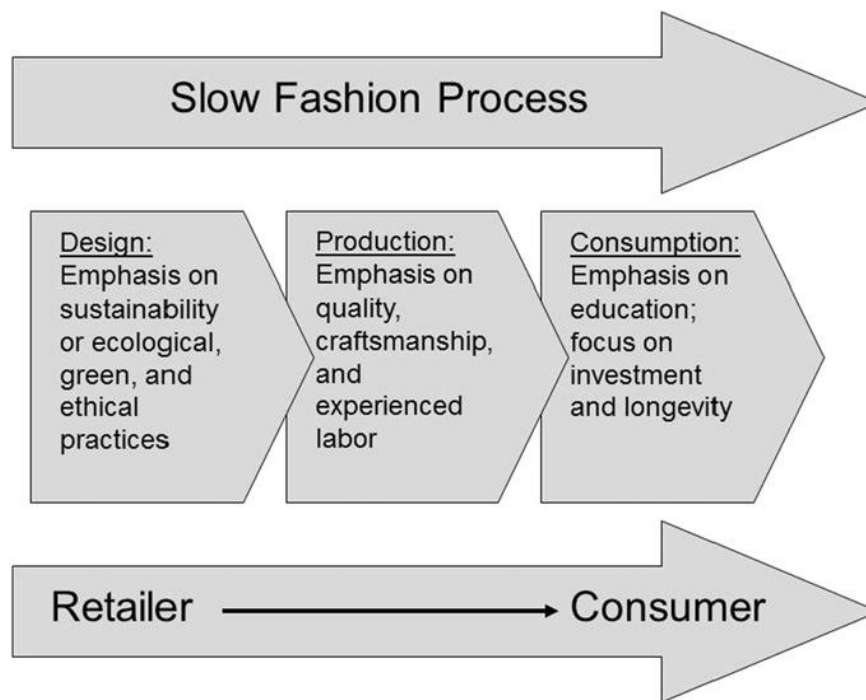
Additionally, the stakeholders' perceptions are especially relevant for this study as the integration of sustainable processes in the supply chain management is demanded by stakeholders (Caniato, Caridi, Crippa & Moretto, 2012). Elkington (1998) initiated the concept of the triple bottom line, which attempts to strengthen the operationalization of sustainable development in the business context. The triple bottom line includes also the economic, environmental and social case of sustainability which was intended to offer a guideline for companies how to consider current and future stakeholder needs. This concept is found to be more beneficial for this study as Freudenreich and Schaltegger (2019) found that the stakeholder discussion on sustainability in apparel production is mostly on a sustainable supply chain management. However, the main challenge with implementing a sustainable supply chain is to maintain higher sustainability standards while delivering the same output of apparel which are disposed in a short timeframe (Beske-Janssen, Johnson & Schaltegger, 2015).

The fast fashion is a prime example for the high consumption levels which are in opposition to the sustainability concept. The fast fashion industry grew significantly since the 1990's and is signified by a globalized, vertically integrated production (Tokatli, 2007; Martinez Barreiro, 2008). In detail, fast fashion is characterised by large volume production with short lead-times and a focus on low-cost materials and labour to produce apparel with short lifecycles. Thus, the business model of fast fashion, as the name indicates, relies on a supply chain which can quickly respond to trends and customer demands and delivers apparel in the shortest time possible (Barnes & Lea-Greenwood, 2006). Apart from its distinctive supply chain, some of the characteristics of fast fashion are mass production and its higher number of fashion seasons (Li, Zhao, Shi & Li, 2014). Slow fashion tries to counteract the high consumption levels which are in opposition to the sustainability concept. The next chapter introduces slow fashion and its value-driven approach.

2.1 The Characteristics of Slow Fashion

'Slow fashion' is a social movement which was first coined by Fletcher (2007) and suggests a different approach to customer relationships and value proposition in the fashion industry. The term slow fashion as well as its value proposition is inspired by the slow food movement which emerged as a counter movement to fast food (Todeschini, Cortimiglia, Callegaro-de-Menezes, & Ghezzi, 2017). Slow fashion and slow food do not aim to be in complete opposition to their counterparts, however, the conscious movements strive to offer more value by linking consumption with pleasure, awareness, and responsibility (Fletcher, 2010). Therefore, the idea of slow fashion is a sustainable approach not only applied to the production aspect of apparel. The movement has a more holistic approach to creating more sustainable processes in design, production, and consumption. In Figure 1, Pookulangara and Shepherd's (2013) framework model for the slow fashion process is depicted in which they summarize the key elements of the slow fashion approach. In detail, they show the social movement's actions to avoid textile overconsumption and lack of sustainability in the fashion industry. Thus, slow fashion offers a different view on value proposition by requiring more conscientious decisions throughout all levels of apparel design, production, and consumption.

Figure 1: Pookulangara & Shephard's Framework Model for the Slow Fashion Process



Reprinted from: Slow Fashion Movement: Understanding consumer perceptions-An exploratory study (20(2), p.202), by Pookulangara, S. & Shepherd, A. (2013), Journal of retailing and consumer services.

Thus, slow fashion offers with its holistic view a more suitable approach to tackle the environmental and social issues of the fashion industry than eco-fashion, green fashion, or sustainable fashion. On the one hand, all the before mentioned terms comprise a decreased negative impact through efficiency gains in the production phase of apparel. In detail, Jung and Jin (2014) found that the focus in the sustainability effort of the fashion industry was replacing harmful chemicals with environmentally friendly materials and reducing waste through recycling. On the other hand, none of these efforts address the main sustainability challenges of the fashion industry: the overconsumption of clothes. The focus in slow fashion is not only on sustainable processes in production but also on extending the lifespan of apparel for as long as possible. This is realised by putting an emphasis on long lasting designs, customer education, and reuse (Pookulangara & Shephard, 2013). Therefore, the holistic view in slow fashion is more suitable to challenge the sustainability issues in the fashion industry than other prevailing concepts.

Even though most of the existing research focuses on defining the actual concept of slow fashion, there is not an agreed-upon definition of slow fashion. This leads to different understandings of the concept. For instance, whereas the

clothing brand Patagonia is often mentioned as a prime example of slow fashion, Jung and Jin (2014) decline this statement as for them slow fashion has to fulfil the criterion of localism to implement sustainable production processes. In detail, Patagonia does not fulfil Jung & Jin's (2014) criterion as the majority of their operating offices are in upper-income countries whereas their producing factories are mostly in lower-income countries in Asia (Patagonia, Inc., 2021). However, as the manufacturing process of the fashion industry is mostly based in lower-income countries and is moved to Europe and the U.S., it would be quite limiting and not realisable on a bigger scale to state that only locally produced apparel is considered slow fashion. Therefore, Clark's (2008) statement can be considered in this context as she states that "locally made" does not necessarily comprise that the apparel is manufactured close to the market where it is sold. Moreover, she argues that local can be a specific geographical site with the use and reuse of local resources. Additionally, Fletcher (2008) states that localism comprises a sensibility to place and scale with a focus on supporting communities while protecting the environment. Therefore, this Master's Thesis considers apparel as slow fashion even if it is not manufactured close to the market where it is sold. As a common agreed on definition of slow fashion is missing, the following paragraph describes how slow fashion was understood for this study.

Jung and Jin (2014) provided the most in-depth description of slow fashion in their theoretical investigation of slow fashion. In their research, they found that slow fashion has four dimensions which differ distinctively to similar concepts like eco-fashion, green fashion, or sustainable fashion. Dimension 1 was defined by Jung and Jin (2014) to be the consideration of the well-being of the producers and communities involved in creating apparel. Slow fashion companies implement this dimension through a fairer approach to working conditions, salary, and a more equal profit distribution. Dimension 2 was identified as providing a background story to the customer to explain why the apparel has an increased value due to its more sustainable processes throughout all levels of apparel design, production, and consumption (Jung & Jin, 2014). In detail, slow fashion offers here a distinction to eco-fashion, green fashion, or sustainable fashion as it is aimed at creating an authentic sustainable product by including sustainability throughout all processes. For instance, it is not considered an authentic slow fashion product if only sustainable materials are used whereas social aspects of the production country are left out. Similarly, Dimension 3 touches upon that diversity should be supported in the fashion industry. Jung and Jin (2014) noted here the prevailing issue in the fashion industry that mostly Women of Colour are creating apparel whereas the power and leading of fashion empires is often done by white individuals. Therefore, one aim of the slow fashion movement is to give more power to the people creating the clothes and give them the right to co-determination. The last dimension was found by Jung and Jin (2014)

to actively improve the functionality of clothes to make them last longer to avoid textile waste and the need to buy new clothes. This study uses the definition of Jung and Jin (2014) for slow fashion as it provides the most detailed description of the concept. However, to clearly distinguish slow fashion from the continuous oversupply of fast fashion with 20 collections, Goworek et al.'s (2020) criterion is added to define slow fashion as a company having a maximum of four collections per year.

2.2 Slow Fashion Retailers and Customers

Slow fashion is an expression of a changed customer preference in which consumers aim to minimise their impacts. Todeschini et al. (2017) found that this leads to the transformation of business models which can be seen with the rise of slow fashion retailers. Whereas traditional retail is about encouraging shopping to increase turnover and ultimately gain a bigger market share, slow fashion focuses more on educating the customer and offering long lasting clothes (McNeill & Snowdon, 2019). Furthermore, De Brito et al. (2008) found a need for more collaboration between all actors to change the fashion industry in a fundamental way and tackle its sustainability challenge. Sharma et al. (2010) emphasise this point as according to them a focus only on the end-consumer results in surplus supply because demand cannot be accurately forecasted without the feedback along the supply chain. Therefore, as slow fashion is expressing a changed customer preference and retailers are receiving direct feedback from their customer base, their insights are especially valuable to determine which distribution system is more beneficial for the industry.

Slow fashion retailers have a range of characteristics which distinguish them from traditional retailers. However, as the concept of slow fashion is fairly new, the research on it and surrounding concepts are still emerging. Therefore, there is no agreed-on definition of what a slow fashion retailer or a slow fashion customer is. For the purpose of this study, McNeill and Snowdon's (2019) definition of slow fashion retailers in their research is used as they define them as independent, local, and small-scale retail stores which use sustainable principles in their selection of goods. The shops are usually characterised by offering higher priced products and a smaller sales volume than fast fashion shops (McNeill & Snowdon, 2019). A focus is on a holistic application of sustainability in the retail store by energy conservation, waste reducing and recycling (Todeschini et al., 2017). Conclusively, slow fashion retailers have shops which offer slow fashion apparel and function as a link between the supplier and the customer. Not only do retailers give feedback on the apparel to the slow fashion brands, but they can also influence the customer's buying decision by providing information about a product's social and environmental aspects (Yang et al., 2017). Additionally,

McLaren, Oxborrow, Cooper, Hill, & Goworek (2015) emphasise the retailer's influence on the consumption of the customer as the longevity of customer's clothes is dependent on the quality offered by the retailer. Therefore, slow fashion retailers inherit an important role in promoting slow fashion as they are in direct contact with the customer and can give unique insights into customer demands and needs.

One of the distinguishing criteria of slow fashion retailers is their customer base which focuses on ethical consumption. Ethical consumption was defined by Cooper-Martin and Holbrook (1993) as a consumption which is influenced by the consumer's ethical values. Ethical consumption is thus based on the assumption that customers transfer their ethical concerns toward the environment or society into their shopping behaviour. Crang and Hughes (2015) state additionally that ethical consumption is seen as a way in the globalised economy to connect the wealthier consumers with the often-poor producers and workers. Nevertheless, one of the main research areas related to ethical consumption is the *Attitude Behaviour Gap*. The *Attitude Behaviour Gap* describes the discrepancy of consumers increasingly claiming to purchase ethical products, whereas the reality often shows that there is a discrepancy what consumers claim and purchase (Peattie, 2001; McNeill & Moore, 2015; Belk, Devinney, & Eckhardt, 2005; Carrington, Neville & Whitwell, 2014). For this study, ethical consumption is especially interesting as slow fashion emerged from ethical consumption. Thus, the behaviour of slow fashion consumers is analysed in this study through the perceptions of slow fashion stakeholders.

However, Niinimäki (2010) correctly identified in her research that an understanding of a slow fashion customer is significantly lacking. Jung & Jin (2014) observed that the group of slow fashion customers is willing to pay higher prices for their apparel if it complies with their personal values. Mintel's (2009) and the 2015 Global Corporate Sustainability report's observation by Nielson add to this as they found a rise in customer willingness to spend more on a product from a sustainable brand. However, Joy, Sherry, Venkatesh, Wang, & Chan, (2012) state that even with rising concern for environmental issues, negative consumption patterns are still practised by this group. Furthermore, Niinimäki (2010) found that slow fashion customers are still a small group in the fashion industry. Nevertheless, it is very likely that the slow fashion customer group is growing as Wood (2009) mentioned a "rise of slow fashion" which was noticed by retailers. Additionally, Jung and Jin (2014) conducted a survey in the US in which they found that slow fashion customers seek more high quality and timeless styles that last more than one fashion season. Furthermore, Watson & Yan (2013) found in their research that slow fashion retailers try to appeal to their customers with versatile, quality apparel which fits into the awareness and responsibility criteria of slow fashion. Therefore, the slow fashion customers are defined in this study as a customer base which is willing to spend more money for a product which complies with their values, seeks more high-quality clothes, and counteracts the speed of change of the fashion industry.

2.3 The Need for Different Distribution Systems of Apparel in Slow Fashion and Fast Fashion

Previously, the rapid change and volatile demand in the fashion industry was successfully met by fast fashion brands with an agile supply chain (Christopher 2000). However, as slow fashion customers focus more on quality and purchasing apparel that is in line with their ethical values, it is questionable if this supply chain is applicable for slow fashion as well (McNeill & Snowdon, 2019; Pookulangara & Shephard, 2013). Yang et al. (2017) emphasise that finding the most suitable supply chain strategy depends on the characteristic of a business and its aims and goals. Therefore, it cannot be assumed that the same supply chain strategy is the best for slow fashion and fast fashion. The following paragraph introduces the different distribution systems which exist in the slow fashion industry and their advantages and disadvantages according to previous research.

In slow fashion, supplying the retailer is realised in two different ways. One traditional way is a *NOS System* from which retailers can order apparel the whole year round depending on the demand of their customers. By offering the product long-term, the focus can be put on cost reduction and improved quality. A second way is imitating fast fashion brands by displaying seasonal collections which pick up fashion trends, however, with the addition of a pre-order system for retailers four times a year to predict the demand accurately and to avoid over-supply. Therefore, both distribution systems have advocates who claim that their distribution system is more adequate and profitable for slow fashion products.

The dispute which distribution system is more suitable is also displayed in research as there is no common agreement. On the one hand, studies found that to succeed in the competitive fashion markets, new trends have to be continuously introduced by fashion brands which can only be done by copying an agile supply chain of the fast fashion industry (Christopher, 2000; Niinimäki & Hassi, 2011). Furthermore, Sharma et al. (2010) support the statement that *Seasonal Ware* would be a more sustainable approach as according to their findings, building a product only after it has been ordered is most suitable for sustainable concepts as it reduces surplus supply. On the other hand, there are statements that slow fashion customers focus more on quality and function which can be only fulfilled if the *NOS System* allows for a longer product development stage (Jung & Jin, 2014). Therefore, this research gives insights into this debate by presenting the perceptions of slow fashion stakeholders on the distribution systems.

Unfortunately, current research does not provide sufficient insights into this issue as a research gap exists. One way to bring this topic into a broader context of research is the distribution of functional and innovative products and the difference in supply chains. Fisher (1997) coined this distinction of products based on the demand patterns. It is important to note here that functional and innovative products can be physically identical, however, still differ in their de-

mand patterns. Fisher (1997) stated that functional products satisfy basic demands and have a long-life cycle among other features. In slow fashion, this is realised by brands offering a *NOS System* from which retailers can order apparel the whole year round depending on the demand of their customers. By offering the product long-term, the focus can be put on cost reduction and improved quality. In contrast, the innovative product is defined by Fisher (1997) as having a volatile demand and a shorter life cycle. This is implemented by slow fashion brands through seasonal collections and a pre-order system four times a year to predict the demand accurately and to avoid oversupply. Therefore, both distribution systems have strategies to include sustainable processes. How Fisher (1997) defined functional and innovative products can be seen in Figure 2:

Figure 2: Fisher's Framework Model for Functional and Innovative Products

Functional and Innovative Products		
Characteristics of Demand	Functional (Predictable Demand)	Innovative (Unpredictable Demand)
Product Life Cycle	More than 2 years	3 months to 1 year
Contribution Margin	5% to 20%	20% to 60%
Product Variety	Low (10 to 20 variants per category)	High (often millions of variants per category)
Average Stockout Rate	10%	40% to 100%
Average forced end-of season markdown as percentage of full price	1% to 2%	10% to 25%
Lead Time required for Made-To-Order Products	6 months to 1 year	1 day to 2 weeks

Reprinted from: What is the right supply chain for your product? (75, P.105-117), by Fisher, M. L. (1997), *Harvard Business Review*.

Ultimately, it can be seen that functional and innovative products might be physically identical, however, they differ in several aspects. The functional product is intended to have a longer product life cycle and has lower forecasting errors and product variety. In contrast, the innovative product offers a higher contribution margin to the company and a higher product variety which might

appeal to the customers more, however, it shows also a higher percentage for markdown at the end of the season. It should be noted here that Fisher's (1997) categories of functional and innovative products are applicable to the fashion industry in most aspects. However, when looking at Figure 2 it is noteworthy that the lead time of 1-2 weeks for innovative products is far too short for the *Seasonal System* presented earlier. Mattila, King, & Ojala (2002) define the lead-time in the fashion industry as the time a product needs from design to the delivery of the product by the supplier. Nevertheless, a report by Berg, Heyn, Hunter, Rölkens, Simon, & Yankelevich, (2018) commissioned by McKinsey, found that the most advanced fashion companies need a minimum of 11 weeks for their lead-time. Therefore, the categorisation by Fisher (1997) of innovative products having a lead time of 1-2 weeks can be seen as a resulting inaccuracy as he categorizes all existing products. In this study, it is argued that his model is still applicable in all other aspects of the slow fashion industry.

Another aspect Fisher (1997) suggests is the design of supply chains which should be adapted according to the products identified. He suggests that for functional products an efficient supply chain should be implemented which has the advantage of focusing on the efficient use of resources and cost reduction and the disadvantages to being restricted in its ability to respond to market changes. In contrast, Fisher (1997) recommends using a market-responsive supply chain for innovative products. This supply chain offers high flexibility, shorter lead-times, and the ability for more variety (Harris, Compton, & Farrington, 2010). Figure 3 provides an overview of the characteristics of the physically efficient supply chain and market-responsive supply chain suggested by Fisher (1997):

Figure 3: Fisher's Framework Model for Efficient and Responsive Supply Chains

Efficient and Responsive Supply Chains		
Supply Chain	Physically Efficient Process	Market-responsive Process
Primary Purpose	Supply predictable demand efficiently at the lowest possible cost	Respond quickly to unpredictable demand in order to minimize stock-outs, forced markdowns, and obsolete inventory
Manufacturing Focus	Maintain high average utilization rate	Deploy excess buffer capacity
Inventory Strategy	Generate high turns and minimize inventory throughout the chain	Deploy significant buffer stocks of parts or finished goods
Lead-time Focus	Shorten lead time as long as it doesn't increase cost	Invest aggressively in ways to reduce lead time
Approach to choosing Suppliers	Select primarily for cost and quality	Select primarily for speed, flexibility, and quality
Product-Design Strategy	Maximize performance and minimize cost	Use modular design in order to postpone product differentiation for as long as possible

Reprinted from What is the right supply chain for your product? (75, P.105-117), by Fisher, M. L. (1997), *Harvard Business Review*.

In the slow fashion industry, both interpretations of apparel being a functional or innovative product are existing and there is no agreement in the industry which is the more suitable. Therefore, this study also offers retailers' insights on their preferred distribution system to assess which distribution system is more beneficial and accepted among their customers. Ultimately, the interviews are analysed with Fisher's (1997) model to see which demand pattern slow fashion apparel has and which distribution system of apparel would be most suitable.

Therefore, the question if slow fashion and fast fashion need a different supply chain is not only interesting in the aspect of competitive advantage. However, De Brito et al. (2008) emphasise that modern agile supply chains often conflict with sustainability, and therefore, it is of interest to investigate this issue further by interviewing stakeholders of the fashion industry to get more insight into their approach to distribution and sustainability.

2.4 The Effect of the Scarcity Effect and Discount on Sales

One aspect which needs to be considered when thinking about how slow fashion can optimise its distribution system is the scarcity effect as it is one of the main tools for the growth of the traditional fashion industry. The scarcity effect is the effect when consumers perceive a product to be limited and therefore evaluate it as more attractive, unique, and desirable (Lynn, 1991, Gierl & Huettl, 2010; Aggarwal, Yun & Huh, 2011). For instance, gold would be a product which is a naturally scarce product. However, human-induced scarcity is mainly used by marketing to create more demand for a product (Gupta & Gentry, 2016). What makes the scarcity effect so effective is the creation of an urgency to buy which is defined as the customer's increased desire to purchase a product instantly and therefore limiting his choice to delay a purchase (Gupta & Gentry, 2016). Therefore, the scarcity effect can lead to increased sales volume as customers are motivated to buy the product right away instead of delaying their purchase and possibly buying at a competitor.

The scarcity effect was one of the main ingredients of the recipe of success for fast fashion to create a sense of urgency in a customer that the piece of apparel they want to purchase might not be available next time when they enter the shop. This leads to impulse buying and recurring consumption and ultimately to the huge success of fast fashion as the business model is based on purchasing more and more clothes (Niinimäki et al., 2020). As previously said, fast fashion creates this sense of urgency by offering up to 20 collections annually and therefore moving stock rapidly (Watson & Yan, 2013). Some slow fashion brands imitate the scarcity effect by changing their portfolio four times a year and try to increase their sales volume with this strategy (Goworek et al., 2018). However, it is suggested by research that conscious customers are more sensitive than regular customers about an increased turnover and are tired of chasing trends (McNeill & Snowdon, 2019; Pookulangara & Shephard, 2013). Therefore, this study investigated how the scarcity effect influences the sales volume of slow fashion to compare its effectiveness to the traditional industry standards.

On one hand, McNeill and Snowdon (2019) found in their research that one of the main challenges for slow fashion retailers is to find a way between the values of slow fashion and the prevalent traditional industry standards. In detail, they note that customers have been conditioned to purchase apparel in every season rather than when it is needed. In addition to this, research suggests that the scarcity effect is a very useful tool for motivating the customer to buy right away and increase sales volumes (Gierl et al., 2008; Gupta, 2012). Therefore, the scarcity effect could be a useful tool to get slow fashion out of its niche position and increase market share.

On the other hand, Sharma et al. (2009) emphasise that promoting *Seasonal Ware* implying a scarcity effect, often leads to overconsumption, discounts, and to producing too much variety. Discounts can be also named markdowns which

means that a price of a product is permanently reduced and is not brought up to the same level again in the same selling season (Cosgun, Kula, Kahraman, 2017). Thus, markdowns are used as a sales promotion as the consumer experiences the offered product with a price discount as more attractive which leads to increased sales and profits. There are several voices which note that sustainability should be at the heart of slow fashion and its aim to change the fashion industry. Therefore, the scarcity effect and promoting the sales of a product is at odds with the value of slow fashion (Freudenreich & Schaltegger, 2020; McNeill & Snowdon, 2019; Ertekin & Atik, 2015). However, this study shows how the scarcity effect and discounts are implemented in slow fashion and how slow fashion stakeholders interpret its effect.

3 DATA AND METHODOLOGY

The purpose of the present study is to explore the perceptions of slow fashion stakeholders on the distribution of slow fashion apparel. In detail, the aim is to have a better understanding if the *NOS System* or the *Seasonal System* is more beneficial for the distribution of apparel in the slow fashion industry. Therefore, the research questions intend to investigate the perceptions of individual stakeholders on both distribution systems in the slow fashion industry and which of the two serves better the needs of slow fashion customers. Thus, 10 semi-structured interviews with slow fashion stakeholders were conducted. The following section introduces the methodology used including the research design, data collection procedures and data analysis.

3.1 Research design and approach

This study uses a qualitative research design to investigate the research questions as it was considered most suitable for answering the research questions. Firstly, slow fashion is still a niche concept, thus there is little academic literature concerning the topic. Therefore, a qualitative research design is utilised for this study as existing empirical studies on the subject are scarce. Stanton and Guion (2010) found that the qualitative methodology is especially suiting for exploring conceptually and empirically underdeveloped phenomena. Furthermore, a qualitative research design was chosen because it is considered most suitable to provide insights to answer the research questions and meet the objectives of this study. Qualitative research analyses the participants' statements, their meaning and the relationship between them (Saunders, Lewis, Thornhill, 2019). As this study is about the perceptions of stakeholders on the distribution systems in the slow fashion industry, a qualitative research design helps to explore the issue in detail and to understand actors' behaviours and interactions.

However, there are also disadvantages with a qualitative research design which the researcher needs to be aware of to ensure a valid and reliable study. A characteristic of qualitative research is the critical role of the researcher. The processing of data, drawing conclusions and presenting it are all dependent on the researcher's abilities and dedication, thus he/she plays a crucial role in achieving valid results (Lichtman, 2017). Additionally, personal bias of the researcher might affect the results in a negative way as previous knowledge about the topic or presumptions of the outcome might distort the results. Thus, the researcher can be seen as a part of the research which needs to be evaluated (Lichtman, 2017). In contrast, the researcher in quantitative research can be considered as more independent from the research as statistical methods, standardised measures and classical designs represent the validity and reliability of the study and thus, the

influence of the researcher is smaller. Furthermore, Mayring (2001) stated that the disadvantages of a qualitative research design are its lack of generalisability. For instance, quantitative research uses larger sample sizes to ensure that samples are representative. In contrast, the samples in qualitative research are not aimed for representation. The aim in generating the sample in qualitative research is more on finding important information and meaning. However, the qualitative approach was chosen because of its ability to gain deeper and more descriptive data than a quantitative approach could provide. Therefore, the aim of the thesis is to explore patterns and themes by listening to slow fashion stakeholders to understand concepts and processes in companies rather than testing hypotheses. Discussing the knowledge gained through participants' lived experience secured depth, rather than generalisability. Reliability was secured from exposure to multiple views. Therefore, a qualitative methodology was chosen to be most suitable to investigate the phenomena.

Furthermore, an inductive approach was chosen to approach the data in this study and to draw conclusions. Induction aims at making general statements from particular statements (Lewis-Beck, Bryman & Futing Lao, 2004). This means that a researcher identifies patterns in a data set and draws conclusions and theories from it (Hair & Page, 2015). In contrast, deduction starts with theory and proceeds afterwards to the data. Abduction is a combination of induction and deduction as with this approach, a phenomenon is identified and data is collected and analysed followed by a test with additional data collection (Saunders, Lewis & Thornhill., 2009). However, due to the little amount of academic literature for this study's topic, the inductive approach is considered as the most suitable way to analyse the perceptions of slow fashion stakeholders on the distribution systems in the industry. In addition, the goal in qualitative research is to interpret the meaning. Thus, the collected data provides the basis for drawing conclusions instead of pre-existing hypotheses. Nevertheless, no research can use a purely inductive approach because the researcher would need to have no preconception on the studied object which is not attainable (Gioia, Corley & Hamilton, 2013). In general, researchers often apply induction and deduction in different phases of their studies which has been also realised in this study. In detail, published theory has been read before and during the research project as it supported the understanding of the theoretical background and improved the project overall. However, as there is no existing literature on the distribution systems of the slow fashion industry, the published theory was seen as complementary source to the emergent concepts from the collected data.

3.2 Data collection

Common methods for qualitative data collection are surveys, interviews, observation and documents. The data for this study was collected via personal interviews as it is an appropriate tool to use when exploring opinions, perceptions and attitudes towards a topic (Eriksson & Kovalainen, 2008). In detail, semi-structured interviews with industry professionals were chosen as they are appropriate for considering management issues in a real-world context (O'Gorman & MacIntosh, 2014). In detail, the form of semi-structured interviews gave an overall structure and direction, however, it allows a lot of flexibility to include unstructured questioning. The questions for the in-depth interviews are based on existing literature and consisted of open-ended questions to allow interviewees to share their perceptions and reflect on their own experiences. Although Hair et al. (2016) stated that unstructured interviews also allow for in-depth exploration, it was decided against it as unstructured interviews require advanced interview skills by the researcher which were not fulfilled in this case. Hence, through an interview guide was used in this study to ensure a structure that all the concepts aimed to test were addressed. The documents with the interview questions can be found in German and English in Appendix 1 and 2. Another option for conducting this research would be a focus group as this would have allowed for a discussion between the participants. However, it was decided that it is not possible to gather all participants in one room during the COVID-19 pandemic. Nevertheless, semi-structured interviews were perceived to be ideal for exploring the issue in detail as all participants could voice their opinion individually.

Additionally, the researcher was aware of common mistakes in interviews to improve the validity of the data. Brinkmann (2013) names four vital aspects of semi-structured interviews. Firstly, Brinkmann (2013) states that the interview should not be merely a conversation but has the specific purpose to gather data for a study. Secondly, he states that the interview provides descriptions given by the interviewee how they perceive a problem. Thirdly, the study analyses a phenomenon which exists in real life and lastly used in the aftermath interpretation to gather meaning out of the interviews (Brinkmann, 2013). The researcher ensured the fulfilment of all these pre-conditions of semi-structured interviews and simultaneously avoided suggestive questions and comments to not mislead interviewees in their statements. Additionally, a focus was on letting the interviewees speak and listen to their point of view which is suggested for a successful interview (Hopf, 2012).

Participants for the semi-structured interviews included 10 slow fashion industry stakeholders from 10 different companies of slow fashion retail and of slow fashion brands. The contacts were from a list provided by the company collaborating for the Master's Thesis and were recruited through invitations through phone calls or mails in which the purpose of the thesis was presented. If there was no response, reminder emails and calls were conducted after two

weeks to state the participation request again. All companies in the sample offer slow fashion in Germany and only one company has its company headquarters outside of Germany. Thus, the mail correspondence as well as the interviews were conducted in German and translated for the results of this thesis into English. Additionally, the participants were chosen with the aim to provide a diversity of views and considering the research questions. The sample can be seen in Table 1 and it comprised experienced industry professionals in various technical and managerial roles (including the areas of sales, product management, design, and marketing) from four fashion retail shops, three brands using the *NOS System* and three brands using the *Seasonal System*. Interviews were undertaken between February 2021 and April 2021. Most lasted from 30 to 60 minutes, sufficient to gather in-depth insights, and took place by telephone or by video call, after informed consent for the interviews was secured in writing. For the video calls, the providers Zoom and Jitsi have been used.

Table 1: Details and Key Characteristics of Interviewees

Brands with <i>NOS System</i>			
Interviewee	Gender	Job description	Reason to interview Company
Interviewee 1	Male	CEO	Small brand which offers non-basic <i>NOS Ware</i> for years.
Interviewee 2	Female	Saleswoman	Subsidiary of middle-sized traditional family business. German Pioneer in getting fair-trade certification for their textiles.
Interviewee 3	Male	CEO	Small brand which has its focus on improving the conditions of their supply chain and supply chain transparency.

Interviewee 4	Male	CEO	Small brand which offers products online, in retail and in its own shop. Thus, can offer insights of retail and a brand.
Brands with <i>Seasonal System</i>			
Interviewee	Gender	Job description	Reason to interview Company
Interviewee 5	Male	Head of Sales	A leader in offering slow fashion in Germany. Taking the first steps into the mainstream market.
Interviewee 6	Female	Product development	Small business which has its focus on being innovative and multifunctional.
Interviewee 7	Female	Saleswoman	Medium-sized company which is represented in mainstream markets and recently changed from a <i>NOS System</i> to a <i>Seasonal System</i> . Thus, topic has been discussed in the company.
Slow Fashion Retailers			
Interviewee	Gender	Job description	

			Reason to interview Company
Interviewee 8	Female	CEO/retailer	Owner of slow fashion store and product range is mostly <i>NOS Ware</i> .
Interviewee 9	Female	CEO/retailer	Owner of multiple slow fashion stores. Product range is mostly <i>Seasonal Ware</i> .
Interviewee 10	Female	CEO/brand/retailer	Owner of slow fashion store and distributes own brand. Product range is mostly <i>Seasonal Ware</i> .

Brinkmann (2013) mentions that face-to-face interviews are preferable for gathering data as gestures, body language, and facial expressions can help to extract meaning from the data. However, as the interviews took place during the COVID-19 pandemic, face-to-face interviews were not an option as the risk of infection was too high. Nevertheless, the positive effect of the interviews by phone or per video call were that interviewees were more willing to participate as it resulted in less effort for them to participate. Additionally, they stated to be more at ease as they could be in a familiar surrounding while doing the interview.

The interview questionnaire consists of three parts: (1) introduction of the business model; (2) strategic and practical approaches to the business's customer needs; (3) the perceptions of the two distribution systems of the *NOS System* and the *Seasonal System*. Specific sections aim at senior managers, technical specialist, and design/sales/buying representatives. At the onset of each interview, the researchers asked for permission to record the interviews as well as providing the interviewees with the choice to remain anonymous in the study. The qualitative data records included audio recordings and notes made by the interviewer during the interviews. After each question, the researcher summarised to the participants her conclusions and participants were able to support, refute, or qualify the interpretation. After the interviews were recorded, the researcher transcribed the interviews and prepared summary notes.

3.3 Process of Analysis and Open Coding

In this study, data collection and analysis proceeded simultaneously, which is a common characteristic in qualitative research (Glaser and Strauss, 1967; Strauss and Corbin, 1990; Charmaz & Belgrave, 2007). In this study, the data was analysed with the *open coding* method as the method provides an approach to assess new theoretical possibilities and meaning from the data. *Open coding* is a component of grounded theory and is the process of identifying, coding, and categorizing the main ideas found in the data (Corbin and Strauss, 1990). Birks and Mills (2015) express that an essential element of *open coding* is the simultaneous data generation and data analysis. Therefore, the first three initial interviews were coded in this study before more data was collected to ensure the synchronisation of both processes. The aim was to be as specific as possible and to avoid descriptive accounts. Thus, after conducting Interview 3, the transcribed data was read multiple times to attain an overview of the research data. The *open coding* method is described in detail in the next paragraph.

Open coding is a process of comparing and reorganising data into themes and categories (Saunders, Lewis & Thornhill, 2019). Each item of data collected is compared with the rest of the data. Thus, similarities and differences can be found, and the data is coded in a consistent way which facilitates the process of analysis. *Open coding* was chosen as fitting analytical process for this process. The first step in the data analysis with *open coding* is to identify important words or phrases in the data and brand them with short, distinctive descriptions (Birks & Mills, 2015). Thus, interviews were analysed for relations, similarities and dissimilarities in terms of the research questions and the relevant parts were marked to identify them for further analysis. Research suggests reading the data line-by-line with the attempt to define the meaning of the data by creating codes while studying it (Charmaz & Belgrave, 2007). This was done in this study by reading the texts several times and coding them for each research question separately. Furthermore, constant comparison in *open coding* is used to organise data into themes and categories to facilitate the process of analysis. Table 2 illustrates a sample coding of this study. Furthermore, Birks & Mills (2015) state that data analysis should be considered sufficient when a theoretical saturation is reached. Thus, the *open coding* in this study was stopped when there were no new concepts found anymore.

Table 2: Sample Coding Process

Data extract	Coded for	Theme
<p>Interviewee 9: „We realised that we need a better planning system because we have bigger customers now. However, that is a bit of irony. We only use recycled materials which is not a never-ending material. It is different to conventional material. So, we are dependent on the stuff other people throw away. The sustainability trend is growing now since 2-3 years and also conventional companies start using recycled materials. That increased the demand for these materials immensely.”</p>	<ul style="list-style-type: none"> ▪ Need for better planning ▪ Availability of sustainable material is low ▪ It is more challenging to use sustainable materials 	<ul style="list-style-type: none"> ▪ <i>Seasonal System</i> as a strategic decision ▪ Growth of companies results often in <i>Seasonal System</i> ▪ <i>Seasonal System</i> helps to compete with conventional companies

One challenge with *open coding* is the large number of descriptions which need to be organised. Especially as in the first step of coding, all relevant parts of the data are highlighted and given headings, it is very common to end up with a large number of codes (Burnard, 1991; Eriksson & Kovalainen, 2008). To manage data appropriately, the software QCAMap by Mayring was used in this study during the coding process. QCAMap is a web-based and interactive software which aims at providing support in the qualitative analysis. Thus, QCAMap allowed for an easier labelling and conceptualising of the phenomena found. Conclusively, the first step in this data analysis was the data familiarisation by transcribing the interviews and reading them several times. As a second step, the initial coding process was started in QCAMap in which systematically characteristics of the data was identified. The third step included the searching for themes between the codes and reporting them after reviewing, refining and labelling them. Lastly, it was checked if the codes correlated with current literature and

themes were identified which newly contributed to literature. The following chapter elaborates on the findings of this study.

4 RESULTS AND ANALYSIS

Slow fashion is a holistic approach to create more sustainable processes in design, production, and consumption. The movement is not in clear opposition to its fast fashion counterpart, however, it aims to offer additional value to consumption by adding the aspects of pleasure, awareness, and responsibility (Fletcher, 2010). Interestingly, all interviewees mentioned the clear opposition from fast fashion when they define slow fashion in their own words. Their stated aim is to be more innovative and be an inspiration for customers to consume more consciously. The interviewees' actions to achieve this goal were to produce more quality apparel in terms of long-lasting design, high quality material and comfortable fit.

Insights on slow fashion stakeholders' perceptions of distribution systems are especially valuable as there is a clear agreement among the interviewed companies that slow fashion is in fact a growing sector and experiences an increased demand. For instance, all interviewees describe that there are numerous start-up companies joining the market each year and more and more production sites with adequate certification are offering their services. Another indication for the growth is the statement by two interviewees that they start to take the first steps into the mainstream market. Thus, the sector is more mature now than it was 14 years ago in its beginnings when Fletcher defined it in 2007.

Therefore, research question 1 explores how retailers, brands and customers perceive the distribution of functional and innovative products to evaluate the advantages and disadvantages of the distribution systems. In detail, interviewees were asked which system they prefer and elaborate on the reasons to get a clear understanding what the current state of the slow fashion industry is and what challenges companies and retailers are facing. The results should provide an indication how the *NOS System* and *Seasonal System* can be implemented to ensure the growth of the slow fashion movement while maintaining its values. The following section presents the findings and highlight the key discoveries made.

4.1 Slow Fashion Stakeholders' Perception on the Distribution of Functional and Innovative Products

The main aim of the slow fashion industry is to excite more people about slow fashion to change the fashion industry and consumption of apparel substantially. *NOS Ware* and *Seasonal Ware* are crucial elements to achieve this, and all interviewees in this study state that the topic concerned them. In detail, 10 interviewees state that slow fashion still produces an oversupply of clothes and every slow fashion company should get involved in trying to improve. However, it is of question which distribution system is more beneficial to achieve this goal. The

following analysis explains how slow fashion stakeholders perceive and experience characteristics relating to the *NOS System* and the *Seasonal System* based on their perceptions. Beneficial is that each company has a different focus and customer group so different viewpoints are represented and give insights into the industry.

4.1.1 The Suitability of the *NOS System* and the *Seasonal System* for the Current Challenges of the Slow Fashion Industry

The current challenges in the slow fashion industry give a context to the perceptions of the slow fashion stakeholders on the *NOS System* and the *Seasonal System*. For instance, one challenge which brands state in the interviews is that they aim to go above the current sustainability standard in the industry as retailers and customers demand more sustainability efforts. Firstly, all interviewees state that the design and quality of slow fashion apparel has advanced tremendously in the last years and cannot be distinguished today in terms of looks or quality from traditional fashion. However, the remaining challenge for the interviewed brands is to keep up with the increased sustainability demands by their customer groups. Interviewee 6 describes the slow fashion customers' expectations for innovative product design in this statement:

"I think we mainly focus on the material. This is also represented in our customer group because they ask for instance: 'Could you do a pair of jeans without elastane? So it is 100% organic?' These questions we get a lot." – Interviewee 6

This development of increased customer awareness has also been confirmed in the interviews with retailers. They state that additional sustainability standards to the common certifications make it more likely for customers to buy the piece of apparel. Simultaneously, interviewed retailers also demand and search for better sustainability approaches. Interviewee 9 phrases it like this:

"It is not enough today to be "only" organic and fair. The focus is on exploiting the environment as little as possible and to save resources as much as possible. And that is why I am a fan of the Cradle-to-Cradle concept and when there is a product or a brand which uses this concept then I am very tempted to order it. We do not even search for new brands that are only organic and fair. They do not interest me anymore." Interviewee 9

Thus, retailers state that increased sustainability efforts by a brand makes it more likely for them to add a brand to their product portfolio. Conclusively, the slow fashion industry advanced in design and quality over the last years, however, a continuous challenge for interviewed brands is to find new innovative and sustainable concepts to design, distribute and recycle slow fashion.

Additionally, interviewees state an increased demand for more transparency in production standards by customers. Especially younger generations were

identified to have increased sustainability demands. Interviewee 5 describes the phenomenon in the following quote:

“They want to know where it [the apparel] is from and we realized that the awareness of the younger generation is constantly increasing and growing. They ask specifically which sustainability standards are met and where it was produced etc.” - Interviewee 5

Thus, the quote shows the demand for more transparency in production standards and that especially younger generations are identified with increasing sustainability demands. Therefore, suppliers are a crucial element in creating slow fashion apparel and should be also considered under the aspect of *NOS Systems* and *Seasonal Systems*. Interestingly, all interviewed brands state that they had very close relationships with their suppliers and try to implement a holistic approach to sustainability also in this aspect. Interviewee 7 states it like this:

“Not to change your suppliers constantly is part of the sustainability strategy. That you work more sustainable together and that you have strong business partners” - Interviewee 7

However, the interviews show that the *NOS System* and the *Seasonal System* allow for different supplier relations, which is analysed in the chapter 4.1.4. Conclusively, interviewed brands experience a challenge to increase their sustainability efforts to satisfy customers with an ever-increasing demand for the sustainability standards in the fashion industry. In detail, the themes of innovative product design, supplier relations, and transparency in production standard have emerged. The following chapters summarise the advantages and disadvantages of *NOS Systems* and *Seasonal Systems* and how the interviewees perceive the two distribution systems in the light of current challenges of the industry.

4.1.2 Advantages of the NOS System

Some interviewed retailers and brands state that the *NOS System* is the more sustainable approach to distribute apparel due to its long-term design and absence of surplus stock. In detail, interviewees describe *NOS Ware* as being worn longer by customers as it is not as trend-oriented and more focus is put on long-term design. Interviewee 2 describes it as followed:

“In my opinion, NOS Ware is more sustainable than Seasonal Ware. NOS Ware is more basic apparel whereas Seasonal Ware is more trend-oriented. Which means that a NOS piece will be, generally speaking, worn longer than a Seasonal piece because it is not as subjected to trends.” Interviewee 2

Adding to this quote is the agreement of all interviewees that *NOS Ware* focuses more on meeting basic customer needs whereas *Seasonal Ware* is more about pleasure. This can be also seen as a more sustainable attribute of the *NOS System* as it promotes in this aspect more the conscious consumption. However, the aspect of long-term design in the *NOS System* and *Seasonal System* are additionally explored in-depth in research question 2, which analyses the effect of quality on increased sales. Another aspect which has been named as more sustainable in the *NOS System* than in the *Seasonal System* is the absence of surplus stock. As the product portfolio in *NOS Systems* stays the same for several years, brands and retailers do not need to sell surplus stock at the end of the season in order to create space in the storage facilities to stock a new collection. Thus, interviewees state that less textile waste is created as customers are not tempted to impulse purchases. Conclusively, the *NOS System* is seen as a more sustainable approach for the distribution of apparel by some interviewees as it features apparel which can be worn longer due to its long-term design. Additionally, no surplus stock is created as the *NOS System* features a product portfolio which remains for several years.

The interviewed retailers state that in general, the *NOS System* improves the retailers' service through flexibility and a long-term product portfolio. This is due to the reason that brands with a *NOS System* offer apparel which is available throughout the season and thus retailers are more flexible in the ordering process of apparel. This contrasts with the *Seasonal System*, in which the ordering process is offered by interviewed brands with *Seasonal Ware* two times a year. Thus, retailers can always reorder apparel from a *NOS System* when stock gets low, or a customer asks for it. Additionally, the flexibility of the *NOS System* and the absence of cycles helps retailers to fulfil customer needs as customers can purchase a product again after several years when they were satisfied with it. Lastly, the interviewed retailers state that this characteristic of the *NOS System* helps them to improve their product portfolio. Interviewee 8 phrases it in the following way:

"Ideally, we would like to test apparel for at least two years and then offer it in the shop. We have this option with NOS Systems or rather they offer product ranges which proved their quality over years. This is a very important reason why we prefer NOS Systems. When a brand delivers twice a year a collection then I do not have a chance to test it beforehand." - Interviewee 8

Therefore, according to the interviewees, *NOS Ware* is more favourable for retailers as it allows them to be more flexible in ordering apparel through its constant availability and to improve the retailer's product portfolio long-term.

Another positive aspect of the *NOS System*, which was named in the interviews with brands and retailers, is the system's resilience in times of crisis. As the interviews with retailers and brands were conducted during the COVID-19

pandemic, this topic has often been addressed. Notably, brands which use the *NOS System* report that they are not as affected by the crisis compared to brands which used a *Seasonal System*. The interviewees state that the absence of cycles in delivery and production made them more flexible and they could faster react to the changing situation. In detail, interviewed retailers report that they were able to react easier to changed customer demands with the flexible orders of the *NOS System* as during lockdowns more apparel was bought which did not need to be tried on (e.g., underwear). Furthermore, they state that the absence of a pre-order payment in the *NOS System* helped them in financing new products. Brands which use the *NOS System* state in the interviews that they were able to easily adjust their production to the new demand. Interviewee 7 summarises the positive aspect of the *NOS System* in times of crisis:

“I think that NOS Ware will be more important in the future. Because the world is not so predictable anymore and planning is hard. How many people failed financially because they made a pre-order and committed themselves too early in the season. Many suppliers are flexible and accept cancellations, however, it is a chain.” - Interviewee 7

Therefore, the interviews show that the *NOS System* seems to be more suitable for times of crisis as the system allows for more flexibility in delivery, production and financing for the retailers. This is not only an important finding in the context of the COVID-19 pandemic; it is also an important finding considering supply chain resilience and climate change effects. Nevertheless, the interviewees also express some disadvantages of the *NOS System* which are shown in the following chapter.

4.1.3 Disadvantages of the *NOS System*

A central negative aspect of the *NOS System* named by interviewees, is an increased financial risk for the brand to finance new stock. These results from an absence of retailers' pre-orders, which not only help the brand to estimate demand, however, it usually features an advance payment by the retailer to finance the brand's production of apparel. Therefore, the interviewed brands state that the brand takes the full risk for financing new stock and has the risk of underestimating or overestimating demand as no pre-order is made. Interviewee 2 identifies this risk:

“We offer exclusively NOS Ware, and we work without a pre-order. Which means that we take the full risk with our product line.” - Interviewee 2

The quote shows the financial strain that is put on a brand to finance a whole collection without pre-payment or a pre-order to estimate demand, which many actors are not willing or able to take. This is also represented in interviewees' statement that the more established slow fashion brands might use a mix of *NOS Ware* and *Seasonal Ware*. However, the interviewees are unaware of a larger slow fashion brand which only uses a *NOS System*. Therefore, the *NOS System* poses a big financial risk for the brand which is usually not taken by larger corporations as the investment sum and conclusively the business risk is too high.

Additionally, the interviewed retailers, which mostly order *Seasonal Ware*, state doubts if *NOS Ware* can fulfil the expectations of slow fashion customers in the context of looks and the rate of introducing new products. All interviewees state that new products are necessary to keep their customer's interest to visit the shops or purchase apparel. As the *NOS System* features a system which has a long-term product portfolio and does not introduce new products regularly, interviewees doubt if customers would still see the need to visit their shop. Furthermore, brands with *Seasonal Ware* also state that their revenue is mostly made by more trend-oriented pieces:

“In the end, the customer in the shop decides what she/he wants to buy. And of course, a customer has certain needs.... Typical NOS Ware is a white shirt or a blue, simple shirt. The customer buys this 1-2 times and then his needs are met. So, customers do not have a big demand for NOS Ware. Customers want to show themselves. And that is the fun which Seasonal Ware is made of. NOS Ware is meeting needs and Seasonal Ware is more for pleasure. And these pleasure-pieces make the bigger part of our revenue.” - Interviewee 5

Thus, retailers and brands naturally decide to offer apparel which brings them more customer traffic and the most revenue. Conclusively, the *NOS System* has the negative aspects of posing an increased financial risk to the brands due to the absence of a pre-order. Depending on the customer group, *NOS Ware* might not be suitable to fulfil the slow fashion customers' expectations on looks and their expectations on the rate of introducing new apparel.

4.1.4 Advantages of the Seasonal System

According to the interviewees, the *Seasonal System* is more trend-oriented and succeeds more in competing with the traditional fashion industry, in the terms of slow fashion customers' expectations on looks and the introduction rate of new apparel. Nevertheless, the *Seasonal System's* was regarded by some interviewees as more sustainable than the *NOS System* as it uses pre-orders and less cycles than the traditional fashion industry to determine demand and avoid textile waste. In

detail, the interviewed brands which offer *Seasonal Ware* stated to release two collections of apparel per year which are more trend-oriented and tailored to the seasons than *NOS Ware* is. Through this system, customers need to visit shops regularly as new apparel is presented twice a year. Therefore, interviewees state that the *Seasonal System* succeeds better in creating customer traffic as *Seasonal Ware* fulfils the expectations of slow fashion customers on looks and their expectations on the introduction rate of new apparel better. Similar to the traditional fashion industry, the *Seasonal System* uses pre-orders by retailers with which the brands can pre-determine demand and produce apparel accordingly. This imitates the cycles of the traditional fashion industry, however, it consciously slows down the cycles of the fashion industry to a maximum of 4 per year. Simultaneously, interviewees representing brands with *Seasonal Ware* express that they see the pre-order as a way to reduce textile waste. Interviewee 10 expresses her opinion:

"Pre-orders are actually something sustainable. They only produce what we [retailers] order. Or maybe a little bit more. But then it does not lead to over-production" - Interviewee 10

Thus, the *Seasonal System* offers a similar approach to distributing apparel than the traditional fashion industry, however, it consciously slows it down and aims to be more demand oriented. Conclusively, the *Seasonal System* succeeds better in competing with the regular fashion industry, in the terms of slow fashion customers' expectations on looks and the introduction rate of new apparel. However, the *Seasonal System* is still regarded by some interviewees as a more sustainable approach than the *NOS System* as it uses pre-orders to determine demand and avoid over-production.

Another positive aspect interviewed brands, which use a *Seasonal System*, mentioned about their system in use was an increased loyalty with material suppliers and production facilities. This is an important aspect as all interviewed brands stated that the demand for sustainable materials is rising in the global fashion industry due to the megatrend of sustainability. Even traditional fashion companies increasingly use sustainable materials in their collections. Thus, sustainable materials, like organic cotton, experience a high demand and which results in high prices and/or a low availability. Interviewed brands state that minimum orders and prices of sustainable materials are constantly rising making it more difficult in the niche of the slow fashion industry to purchase material. Traditional companies are usually placing bigger orders which makes suppliers prioritise them. However, the interviewed brands state that if they receive the pre-financing from the retailers through the advance payment when they make their pre-order, they can twice a year place a larger order at material suppliers and

production facilities. Then they have a better chance of getting prioritised by material suppliers. Interviewee 7 summarises the situation:

“Ideally, we would have our own production facilities, however, we are simply not big enough yet. Nevertheless, the suppliers we have deliver to other high-quality brands which picked up on the sustainability trend and they produce for them too. That is the motivation and the background to why we chose the pre-order system. So, we can ensure the quality for our customers and that products are not sold out straight away.” - Interviewee 7

Thus, the *Seasonal System* allows brands to have a higher priority with suppliers as they can place a larger order twice a year. In the light of low availability of sustainable material and rising minimum orders, this allows brands with a *Seasonal System* to compete with other companies over the access to material and production facilities.

Another aspect for interviewed brands to prefer a *Seasonal System* is the possibility of better planning between multiple actors and the aspect of balancing the business risk. In detail, the themes which emerged in the interviews are: a need for better planning due to a fear of selling out and pre-production of products, which are only sold at certain times of the year. The interviewed brands, which have a bigger turnover and experience growth, state that they need better planning for the multiple actors involved. Interviewee 7 describes it like this:

“We realised that by delivering bigger customers, we needed a better planning system for the next season. With a growing number of customers, you need more securities.” -Interviewee 7

Thus, the interviewed brands state that the *Seasonal System* helps them to plan for the next season and avoid being sold-out too early. Additionally, the *Seasonal System* helps to pre-produce *Seasonal Ware*, which is only sold in certain times of the year (e.g., swimsuits) as a *NOS System* would lead to an overwhelmed production and a shortage of products. Furthermore, the retailers' advance payment through the pre-order helps to pre-finance a brand's new collection. It improves the brand's cash flow and distributes the risk on more actors. Therefore, interviewed brands preferred the *Seasonal System* as for them the business risk is shared between multiple actors and it allowed for a better planning and sufficient production for the following season.

4.1.5 Disadvantages of the *Seasonal System*

The negative aspects of the *Seasonal System* stated by the interviewees are in opposition to the positive aspects of the *NOS System*. Namely, the themes of short-term wear, a decrease of a retailer's service, missing resilience in crisis, and excelled consumption through *Seasonal Ware* emerged. Firstly, Interviewee 9 describes a central theme to the disadvantages of the *Seasonal System*: the shorter lifespan of *Seasonal Ware* due to its trend-orientation.

"Seasonal Ware is a bit more short-lived, but they are not Fast Fashion. Still, it is maybe not a timeless piece of apparel." - Interviewee 9

Additionally, one interviewed retailer states she felt the *Seasonal System* decreases her service as she cannot test the apparel for a longer timespan before it is delivered. She also has to restart the process of composing her product portfolio twice a year.

Moreover, brands which use a *Seasonal System* observe that they are not as crisis resilient in the COVID-19 pandemic than the brand with a *NOS System* as the pandemic influenced pre-orders and delivery times. Interviewed brands and retailers do not manage in this changing situation to sell their collection as usual. Therefore, pre-orders and orders for the production facilities are significantly smaller. Last of all, some interviewees state that *Seasonal Ware* still excels consumption as they encourage impulsive purchases through luring the customers to the shop when new apparel arrives which is in opposition to the conscious consumption aim of slow fashion. Conclusively, the interviewees state multiple negative aspects of the *Seasonal System*, however, the *Seasonal System* is currently more frequently used in the slow fashion industry than the *NOS System*. Thus, for brands the positive aspects seem to offset the negative aspects of the *Seasonal System*. The preceding chapters described the advantages and disadvantages of the *NOS System* and the *Seasonal System*. However, the slow fashion stakeholders were asked also about their aspirations for the slow fashion industry to reveal the needs and demands apart from the performance of both distribution systems.

4.1.6 Aspirations of the Slow Fashion Industry

When asked about their ideal distribution system, the interviewees state that one aspiration of the slow fashion industry is a better use of resources. Especially the issue of surplus stock and overproduction has been named as a challenge to the sustainability efforts of the industry. Therefore, some interviewees express that they wish for more concepts in the slow fashion industry aiming for a circular economy to utilize resources better. Another approach stated by interviewees is the need for more collaboration between all actors in slow fashion. In detail, better results could be achieved if there is more feedback along the supply chain. Additionally, some interviewees state that they wish for apparel to be more locally produced again.

“I just don’t like the globalisation of the apparel industry. I think, fashion needs to become more locally produced. Just because to avoid so much transport. And I also don’t like that one country is monopolised and is dependent on other countries because apparel is the only thing they produce” - Interviewee 9

Thus, the quote shows that the globalisation is seen as damaging for a successful collaboration and a fair share for everyone. Therefore, interviewees state in their future outlook that the main issues of the slow fashion industry are similar to the traditional fashion industry: a complex global supply chain with a lack of transparency, overproduction, and the need for a better use of resources.

However, there is no agreement between the interviewees whether politics should take actions regarding these issues. One half of the interviewees states that fast fashion had an unfair price advantage to slow fashion apparel which needs to be resolved by politics. In detail, the interviewees express that they feel the fast fashion industry benefits from exploitation, overproduction and the disposal of apparel as it allows them to offer lower prices. Therefore, these interviewees firstly demand that regulations are needed for raw materials to give farmers their fair share. Secondly, the interviewees state that laws are necessary to prohibit the exploitation of workers and to raise the cost of the disposal of apparel to avoid overproduction.

“Political regulations are needed to stop the exploitation and to end the overproduction and discarding of clothes. Slow fashion has automatically a price disadvantage because it is more expensive to have more sustainable processes in the production phase. That does not feel right.” - Interviewee 8

However, the other half of the interviewees states that they prefer a change initiated from within the industry and the customer as this would result in more appropriate solutions for the industry. In detail, these interviewees express that tools like certifications are more appropriate to tackle the specific issues of the industry compared to political regulations. As certifications can be better adjusted to the specific needs of the industry compared to political regulations. Additionally, this half of the interviewees states they see retailers and brands as responsible to educate customers and raise their awareness even more to change their consumption patterns. Therefore, there is no agreement between the interviewees if political actions are needed to resolve the issues of overproduction, lack of transparency in supply chains, and the better use of resources.

Nevertheless, all the interviewees agree that for an improvement of a slow fashion industry, a more demand-oriented supply is needed. Interviewees state several ideas how this could be achieved. Some interviewees articulate their hopes on digitalisation and the opportunity to offer “ready-to-be-made” apparel. Thus, the distribution of apparel would become more flexible, and apparel

would only be produced after it was ordered. Interviewee 6 makes this statement concerning her aspirations for the slow fashion industry:

“I would prefer as brand to offer a design or a pool of designs from which customers can choose... So we distance ourselves from: ‘We need to do this because that is the system.’ Then we could offer designs digitally without producing them beforehand. That is the biggest problem of the fashion industry, that far too much apparel is produced. And you can only stop that by producing on demand and I mean 100% demand-oriented.” - Interviewee 6

Other ideas expressed by some interviewees are the use of capsule collections to decrease the number of *Seasonal Ware*. In detail, interviewees suggest to keep the rate of introducing new apparel with a low number of new pieces introduced several times a year instead of two big collections. This would make the estimation of demand easier and to react to market changes as the intervals between the deliveries are shorter. Additionally, some interviewees state their wish for *Seasonal Ware* to be made from *Upcycling* so new apparel can be frequently introduced and less resources are used. Thus, the interviewees state their aspirations for the slow fashion industry and the *NOS System* and *Seasonal System*: more demand-orientation and a better use of resources. The next chapter explores what effect quality has on customer satisfaction according to retailers, brands, and customers of slow fashion.

4.2 Slow Fashion Retailers, Brands and Customer’s Demand on Quality

Slow fashion is about buying minimal amounts of apparel to save resources and have a more conscious consumption. Consequently, the ability to wear apparel for several years is immensely important for slow fashion customers. Therefore, research question 2 explores what effect quality has on increased sales according to retailers, brands, and customers of slow fashion. The importance of this aspect has been confirmed by all interviewees which declare that their customers consider quality as one of the main reasons to buy a piece of apparel. Thus, slow fashion brands and retailers are interested in offering apparel which customers can wear for years to fulfil their own sustainability expectations and to satisfy their customer needs. Notably, all interviewees express that there is no difference in the lifespan of apparel of *NOS Ware* or *Seasonal Ware*. Thus, no system seems to offer a better approach on the first glance to wear apparel for several years and consequently decrease the need to buy a new piece of apparel.

Nevertheless, the data in this study reveals that the ability to wear a product for years has multiple aspects and there are similarities and differences between the two distribution systems how to ensure this standard. Firstly, to get a

better insight into the specific expectations of slow fashion customers on apparel, the insights of interviewed retailers are presented. As retailers are constantly interacting with slow fashion customers, they know the expectations brands should fulfil. Furthermore, the similarities and differences between the slow fashion brands using the *NOS System* or the *Seasonal System* are shown and how they ensure that a piece of apparel can be worn for years.

4.2.1 Similarities in ensuring Quality of NOS Systems and Seasonal Systems

Interviewed retailers express that one main aim is to offer slow fashion apparel which lasts for years. As they are in close contact with their customers, their description of customers' expectation shows what brands have to fulfil to meet their customers' needs. Interviewees state that a piece of apparel needs to fulfil all the general requirements a customer expects from a conventional produced piece of apparel. It needs to appeal to a customer through its fit, look, price and material. Additionally, all participants describe that for slow fashion customers specifically quality also entails the quality of production. Thus, slow fashion customers consume apparel differently in the aspect of an increased interest about the production standard of a piece of apparel. Consequently, the verification of better working conditions through a certification were the requirement for slow fashion customers to buy a piece of apparel. For instance, several interviewees articulate that slow fashion customers did not purchase apparel if it was produced in a country which was associated with poor working conditions. Additionally, retailers state that the use of organic materials is an important aspect for their customers to buy a product. They consider it a health-aspect and the slow fashion apparel as non-toxic. One interviewee summarises the criteria for buying a piece of apparel:

“One main criteria is quality. How it is produced, and which material was used. It does not harm. People can wear it without having the need to wash it first, it is nontoxic. That is important for people. And it needs to last long.” – Interviewee 9

Thus, retailers choose brands under the aspect of general requirements for apparel. However, the interviews show that retailers have to deliver more information about the processes and place of production as well as they deliberately choose brands which use organic materials to satisfy slow fashion customer.

Interestingly, retailers and brands declare that slow fashion customers have especially high expectation on slow fashion to last for several years and are highly dissatisfied if apparel does not fulfil their expectations. All interviewees state to take several actions to ensure that a piece of apparel can be worn for years, and the standards of production are less harming for the environment as well as the people producing the apparel. For instance, all brands express that their main focus is to find material that is long-lasting, appealing and has easy care instructions in order to offer the customer the best wear-experience.

“We have our favourite materials which we source from high-quality textile manufacturers. We aim for new materials which are long-lasting like hemp-fibres or linen. Or with organic cotton we pay attention to long fibres which makes the piece of apparel or the fabric lasting longer.” – Interviewee 6

Also, retailers declare that they favour apparel which is made from materials which have easy or commonly known care instructions. This results from the missing knowledge of appropriate product care by customers which is stated as a challenge to offer apparel which lasts for years. Additionally, brands and retailers declare that the improvement of quality has been a main focus in the slow fashion industry in the last years which makes it now equal to traditional apparel from a quality perspective. From the aspect of standards of production, all brands use certifications or certified suppliers to prove to their customers that the apparel is manufactured in a better way. Thus, slow fashion customers seem to have higher expectation on slow fashion apparel to last for years. Therefore, all brands strategically use long-lasting materials which have easy care instructions and certifications to satisfy slow fashion customers' needs.

Conclusively, slow fashion focuses on the purchase of minimal amounts of apparel to decrease environmental impacts which results in customers having high expectations in slow fashion apparel to last for years. The findings show that customers do not only pay attention to general requirements on apparel, but also on the quality in production and the use of organic materials. Brands and retailers react to these higher expectations with the use of long-lasting materials which have easy care instructions. Additionally, certifications are used by brands to build trust and to show their increased efforts in the quality of production to the customers. The precedent chapter showed the similarities of brands to ensure that a piece of apparel can be worn for years. The next chapter depicts the differences in the *NOS System* and *Seasonal System* to ensure long-lasting-apparel.

4.2.2 Differences in ensuring Quality of NOS Systems and Seasonal Systems

It was stated by interviewees that there is no difference in the lifespan of apparel of *NOS Ware* or *Seasonal Ware*. However, the interviews reveal that there are differences in ensuring that pieces of apparel can be worn for years in *NOS Systems* and *Seasonal Systems*. For instance, the product development process and approach to design very much differs depending on whether the brand produces *NOS Ware* or *Seasonal Ware*. Notably, brands using either system state that they feel more flexible in their product development process. The next chapter elaborates why and how the product development processes differ.

4.2.3 Differences in Product Development of *NOS Systems* or *Seasonal Systems*

The product development process of an *NOS System* differs to the *Seasonal System* as there are no pre-determined cycles in which new products are introduced. Figure 4 gives an overview of the difference in ensuring quality of the two distribution systems.

Figure 4: Ensuring Quality in the NOS System and the Seasonal System

• **NOS-SYSTEM**

• **SEASONAL SYSTEM**



PD=Product Development

Thus, interviewed brands with an *NOS System* declare in this context the themes of long-term product portfolios and adding value to their product portfolio. Generally, brands with an *NOS System* offer a product portfolio which remains the same over several seasons. When they introduce new apparel, then the aim is for long-term distribution and to add to the value of the existing product-portfolio. Therefore, the *NOS System* is not restricted by seasons to add new apparel to its portfolio and does not have time pressure to introduce new apparel. One interviewee states:

“I planned to add a dress to the collection this summer... But the process took longer than expected so the dress would have arrived in the middle of the summer which would have been too late. So, we are not going to do it this year but next year.” – Interviewee 4

Another theme which emerges in the context of product development in the *NOS System* is the use of well-known materials to ensure the same quality. One interviewee summarises it like this:

“As we produce our products always with the same material, there is not much groundwork concerning the functionality of the fabrics. We do not need any product testing. Which means we only need a sewing pattern which we send digitally to our production site.” – Interviewee 3

Thus, if a product is added to the product portfolio of a *NOS System*, there is no pre-determined timeline to release the product which makes the brands state that they feel more flexible in releasing a product. The focus in the product development is on developing a product portfolio which offers additional value. Furthermore, all interviewees which represented the *NOS System* state that they prefer to use well-known materials to ensure the functionality of the fabric.

In contrast, *Seasonal Ware* has a pre-determined cycle of introducing new products with its two collections per year. It was discussed in the interviews that brands, which offer *Seasonal Ware* take around 18 months from the first idea to the release of a collection. In contrast to the *NOS System*, their way of ensuring improved quality is not to extend an existing product portfolio. However, the brands reviewed their last seasonal collection and analysed which pieces sold well and which did not and received feedback from the retailers if the quality of a product was insufficient. Thus, brands which use the *Seasonal System* state that a continuous process helps them to improve their product portfolio every year. All interviewees representing the *Seasonal System* declare that they do not renew a collection entirely, however, do “carry-overs” which means using the same piece of apparel in a different colour. Thus, the *Seasonal System* has a fundamentally different way of introducing new products than the *NOS System*, however, they also have a structure in place to ensure the continuous improvement of quality.

Another difference between the systems and their approach to quality is that interviewed brands using the *Seasonal System* mention the themes of innovation, ecology and design in slow fashion in the context of product development. In detail, they see it as part of the slow fashion mission to try new materials to find new more ecological solutions to manufacture apparel and to change the fashion industry substantially. Adding to this, brands with a *Seasonal System* see their collections as opportunity to try new products with new materials without the commitment to keep them in the product portfolio long-term. However, this also implies the aspect of trial and error. Interviewee 6 expresses it like this:

“With Seasonal Ware, you can approach the topic of design very distinctly and you can try stuff... Because we are such a small business, it is simply not possible to test every piece of apparel for a year before we release it. Sometimes we realise that a product loses its colour too quickly. Then you can adjust that in the next season. So, you are more flexible in the production process. Then you can say: ‘This does not work, we are not continuing this piece anymore’.” – Interviewee 6

Thus, interviewed brands which use the *Seasonal System* reduced their release of collections to two a year, however, they see the change in the product portfolio as a chance to try different materials and new products without long-term commitment. The theme of innovation of ecological materials for these brands is more central than for brands which use *NOS Systems*.

Another central theme mentioned by interviewed brands using a *Seasonal System* is the issue of innovative material procurement. Resulting from the low availability of innovative materials, the procurement chain for these is a challenge for brands with a *Seasonal System*. As innovative materials are usually not widely used yet, they are less available and consequently harder to source. Additionally, more planning is needed to include them in a manufacturing process. Interviewed brands which use a *Seasonal System* express it like this:

“For instance, vegan wool is now new on the market. These are things, that you need to source long-term if you want to use it. To ensure the procurement chain.” – Interviewee 5

Therefore, the pre-determined timeline of two collections a year and the pre-order ahead of delivery helps brands to ensure the procurement chain for innovative materials. This is not needed for brands using the *NOS System*, as they know their required quantity of material for production, and they usually use widely used materials such as organic cotton. The last central theme which has been mentioned in the context of ensuring quality is design. The following chapter shows the fundamental difference in this aspect in *NOS Ware* and *Seasonal Ware*.

4.2.4 Differences in Design of NOS Systems or Seasonal Systems

One main difference between slow fashion and traditional fashion is the approach to design as slow fashion does not have the aspirations to be as trend-oriented (Pookulangara & Shepherd, 2013). This also relates to wearing a piece of apparel for several years as trends pass quickly and a customer might discard a piece of apparel pre-maturely if it adheres to an outdated trend. Thus, long-term design is crucial for extending the lifespan of a piece of apparel, however, it was already mentioned in the introduction of this chapter that looks namely design is one condition for customers to buy a piece of apparel. The following paragraphs shows the strengths and shortcomings of brands using either system in the challenge of long-term design.

Retailers, which mostly order brands with a *Seasonal System*, state in the interviews that these brands succeed better in fulfilling the expectations on looks for their customers. Shopping as a leisure activity and richness in design are themes which emerged. This was also confirmed by brands using the *Seasonal System* as they state their aim to make their apparel enjoyable for customers. Furthermore, they emphasise that a variety in design symbolises for them freedom in choice and a chance for the customer to express their individuality. However, in terms of the ability of wearing a piece of apparel for several years, brands which use a *Seasonal System* revealed in the interviews that one of their main challenges is to produce timeless styles which can be worn for years. Interviewee 6 expresses it like this:

“Concerning the design... we try to make it as everlasting as possible. Which is difficult naturally and you can never guarantee that a 100%. Because right now skinny jeans are trendy, but the cut of the legs are getting a bit wider, if everyone is still wearing that in 10 years is questionable. With these things, we try to strike a balance. For instance, when we design pants for summer, we do not go overboard with the wide legs but try to find a middle ground.” – Interviewee 6

In this quote, interviewee 6 describes that brands with a *Seasonal System* already take actions with a moderate design for their apparel not being outdated quickly. However, all retailers confirm in the interviews that brands which use the *NOS System* succeed better in the aspect of long-term design. Interviewee 9 describes it here:

“Still, [Seasonal War] is maybe not as everlasting [design-wise]. NOS Ware are articles which can be worn a whole life. They are always cool and nice. Whereas a seasonal piece can be a bit weird after a while... It has a shorter life-span, that is the downside.” – Interviewee 9

Thus, interviewed brands which use a *Seasonal System* succeed better in fulfilling the expectations of slow fashion customers on looks. Nevertheless, in terms of

wearing a piece of apparel for several year, they struggle mostly with a long-term design.

During the interviews, all interviewees agree that brands with an *NOS System* succeed better in creating apparel which can be worn for years. This is due to the before mentioned reason that brands with *NOS Ware* create products which are supposed to stay in the product-portfolio for several years. Interviewee 2 describes it like this:

“We offer some basic collections since eight, nine years, we just change sometimes a colour and even more fashionable collections are in our portfolio for 2-3 years.” - Interviewee 2

Thus, very basic designs or colour-variations of already existing products are chosen in order to offer timeless apparel. However, the question of *NOS Ware* being sufficient to fulfil customers’ expectations divides the interviewees of retailers in two camps. The retailers which mostly order *Seasonal Ware* state that with *NOS Ware* only, it would be hard to satisfy their customers’ expectations on looks and the desire to explore a variety of design. The retailer, which prefers *NOS Ware* in her portfolio, states that her customers are not as trend-oriented and therefore their expectations for looks and design variety are lower. Therefore, interviewed brands with *NOS Ware* succeed in creating apparel which can be worn for years; however, it seems like depending on the customer group, it can be insufficient to fulfil the expectations for looks and variety of design.

4.3 The Effect of the Scarcity Effect and Discounts on Increased Sales in the Slow Fashion Industry

One of the main criteria of sustainability in the movement of slow fashion is to see it as a concept for a form of a more conscious consumption. The scarcity effect is in opposition to this as it leads to impulse buying and recurring consumption as customers perceive an urgency to purchase the scarce product (Niinimäki et al., 2020). However, the scarcity effect was one of the tools which created the huge success of fast fashion as it generated an increased sales volume. Thus, research question 3 explore what effect the scarcity effect and discounts have on increased sales according to brands, retailers and customers of slow fashion. During the interviews, it has been revealed that most of the interviewees are not familiar with the concept and state that they do not have a strategy concerning the scarcity effect. Nevertheless, there are similarities and differences between the statements about the scarcity effect and discounts from brands offering *NOS Ware* and brands offering *Seasonal Ware*.

In general, all interviewees declare that they would rather use no discounts for selling their apparel. The themes of a clear opposition to fast fashion, fear of inauthenticity and the fear to damage the brand image emerged. Firstly, all interviewees articulate their main aim not to foster overproduction as it is done in the fast fashion industry in the context of economies of scale. Therefore, interviewees distance themselves not only from fast fashion, but also from the topic of discounts. Additionally, interviewees state that they feel a discrepancy to promote sustainability and to pose incentives with a discount to increase consumption. One main concern is the customer feeling misguided by claims that a product is limited and should therefore be acquired quickly before stock runs out. Thus, the scarcity effect and discounts are avoided by interviewed retailers and brands due to a fear of inauthenticity. Lastly, interviewed brands express the concern of damaging the brand image with excessive discounts resulting in customers not willing to pay the full price anymore. Interviewee 1 makes this statement:

“I see this very often on Instagram or Facebook that some brands give 40% discount once a week. I have the feeling that damages your brand a little. It is weird. I would not shop there either for the regular price.” - Interviewee 1

Thus, interviewed brands and retailers distance themselves from the scarcity effect and discounts due to a clear opposition to fast fashion, fear of inauthenticity and the fear to damage the brand image.

Nevertheless, most interviewed slow fashion retailers and brands, except for one brand with an *NOS System*, state that they use discounts occasionally. The themes which emerged from the interviews to explain this discrepancy are a general oversupply of apparel in the industry and a shortage of storage facilities. Firstly, all interviewees state that they do not see the discounts as the main issue, however, the interviewees considered them as a symptom of the oversupply of apparel in the fashion industry.

“There are just huge amounts. It is not produced for demand. They are producing like crazy... They mass produce. They have an overall effect on the prices on the market.” - Interviewee 9

Thus, the quote of Interviewee 9 shows that the oversupply of apparel in the market results in excessive discounts also affecting the slow fashion industry. As the supply is not demand-oriented, surplus stock is created and discounts are used as a tool to sell the surplus stock.

The shortage of storage facilities is another theme which emerged in this context as the interviewees name it as another main reason to give discounts on apparel. Interviewees state that they use discounts to sell apparel, which will not be restocked due to low sales volume or shortage in material, to sell surplus stock

or to sell remaining products with lower-quality or less common sizes. Interviewee 5 gives this statement about discounts:

“Yes, we offer discounts. We need to do it... There is no way around it. Because we are an economic enterprise and if we have surplus stock, we need to liquidate it. We cannot produce so accurately that we are going to sell everything for the full price. It is not possible. That is very often controversially discussed in the slow fashion industry. We have to defend ourselves for using discounts” - Interviewee 5

Thus, as slow fashion is a part of the fashion industry and is also affected by the oversupply of products on the market, discounts are used occasionally to empty storage facilities. Therefore, all interviewees declare that they would rather not offer discounts as they see a discrepancy between promoting sustainability and to pose incentives with a discount to increase consumption. However, most of the interviewees still offer discounts occasionally as they saw it as necessary to clear surplus stock.

An additional theme in the context of sales is a lower price as selling point. All interviewees stated that slow fashion customers are more aware why slow fashion apparel has a higher price than traditional fashion and are more willing than in the past to pay extra for slow fashion apparel. However, all interviewees also express that the price of a piece of apparel is a major selling point and slow fashion customers are still highly interested in discounts even though they try to consume more consciously. On the one hand, interviewees state positively that a higher price results in a more conscious consumption as customers think more about if they really need a piece of apparel and are more careful with product care. Thus, a higher price seems to make customers value the apparel more and supports the notion of conscious consumption. On the other hand, Interviewee 10 also adds the statement that discounts increase her sales volume:

“Yes, if there is a discount and my customer has to decide between two pieces of apparel, then they are more likely to take the second piece as well.” - Interviewee 10

Additionally, interviewees not only state that the use of discounts increase the chance of slow fashion customers purchasing more apparel. However, they also report that a lower price for substandard apparel resulted in a higher likelihood for traditional customers to buy it. Thus, slow fashion customers are willing to pay extra for slow fashion apparel, however, a lower price of a piece of apparel is still an advantage and leads to increased sales for the interviewed retailers and brands.

4.3.1 Difference between *NOS Systems* and *Seasonal Systems* concerning the Scarcity Effect and Discounts

Although interviewed retailers and brands do have a similar standpoint on the scarcity effect and discounts as they would rather avoid it, some different themes emerged when interviewing brands with *NOS Ware* and *Seasonal Ware*. In detail, brands with *Seasonal Ware* see their apparel as seasonal product which results in discounts if they did not sell in that season as the product loses its value. In contrast, *NOS Ware* sees apparel as non-seasonal products which can be sold independently of the time of the year. The following chapter depicts the perceptions of interviewed brands with a *Seasonal System* towards the scarcity effect and discounts.

4.3.2 Scarcity Effect and Discounts in the *Seasonal System*

Interviewed brands which use the *Seasonal System* state that discounts are an established feature necessary for their system to work. Interviewees express the challenge to plan accurately as main reason why discounts are necessary with a *Seasonal System*. In detail, interviewed brands with a *Seasonal System* state that although they take a pre-order from retailers, they produce some additional apparel for their online shop and for giving the opportunity to retailers to restock pieces they have sold early in the season. Thus, the pre-order allows some estimation for brands on the demand for their collection, however, it is still not entirely demand-oriented. Interviewee 5 made this statement about discounts:

“We try of course to have as little discount as possible through planning our production volume as accurately as possible. But we do not always succeed in that. You never calculate it correctly. You always have surplus stock. We need to liquidate it through discounts two times a year” - Interviewee 5

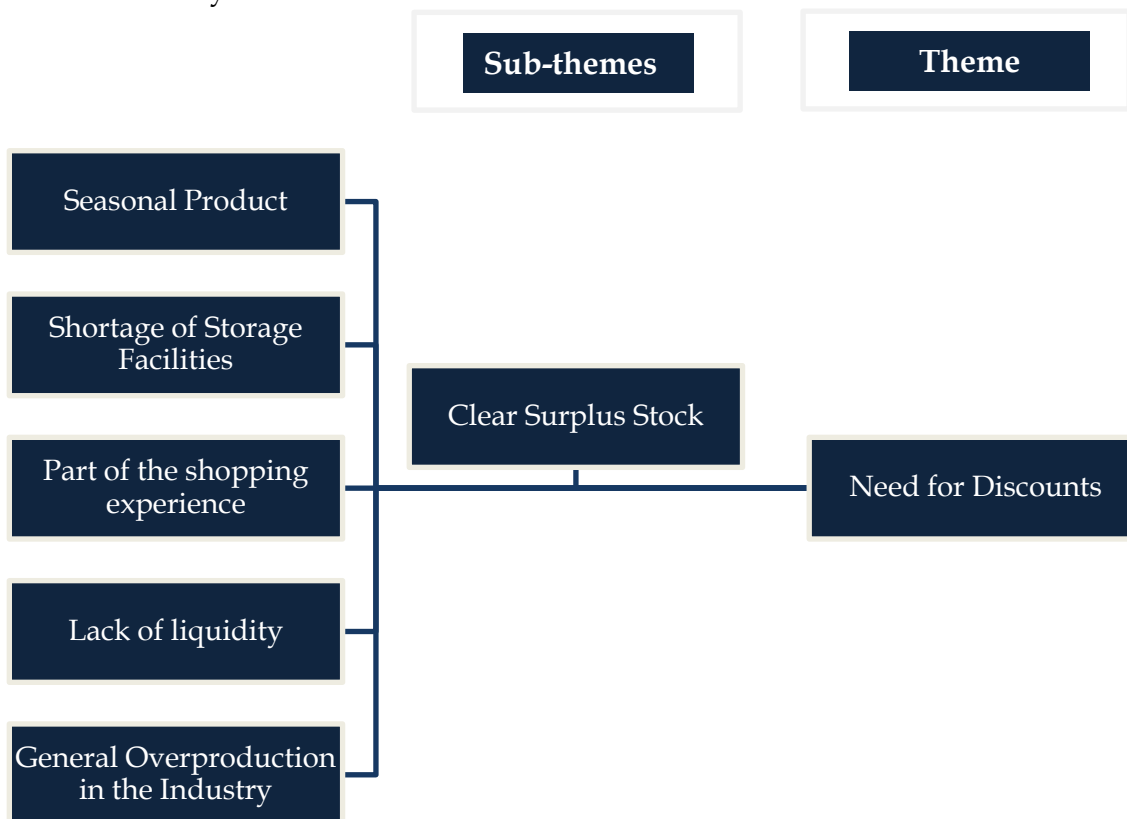
Therefore, interviewed retailers and brands with a *Seasonal System* declare that it is impossible to plan accurately which results in surplus stock after every season and needs to get cleared through discounts. Therefore, apparel is seen as seasonal product which loses part of its value if it does not get sold in the season it was intended for. Additionally, the end of the season is also when new orders are made for new collections and customers are likely to buy more when there is a discount. Thus, discounts help the interviewed retailers and brands with liquidity before placing an order for the new season. Conclusively, discounts are an established feature in the *Seasonal System* as it is a tool to clear surplus stock after every season and helps with liquidity.

In addition, interviewed retailers and brands with *Seasonal Ware* emphasise the characteristics of shopping as leisure activity and discounts as an essential part of the shopping experience. Interviewee 9 makes this statement about discounts:

“I think discounts are part of the shopping experience. Especially younger people... They go to the city and they are happy, and we are happy that they own this piece of apparel now. And they made a steal. Isn't that wonderful? Of course, discounts still should not be used too often” - Interviewee 9

Thus, discounts are offered to get rid of surplus supply, which helps brands and retailers with liquidity, and they are considered part of the shopping experience. Additionally, some brands and retailers state that the offering of discounts provides access to slow fashion apparel for lower income groups. Thus, they feel like they can make the slow fashion industry more inclusive for all income-levels. Nevertheless, all interviewees state that they very rarely offer discounts and choose the timing as late as possible in the season to not contribute to premature discount-battles. Thus, discounts are part of the *Seasonal System* as the interviewed retailers and brands with *Seasonal Ware* consider it as a part of shopping experience. However, interviewees state that they still try to use discounts cautiously in order to avoid overconsumption and discount-battles. Figure 5 shows the subthemes which emerged with the theme of discounts and the *Seasonal System*.

Figure 5: Sub-themes which contribute to the Need for Discounts in the Seasonal System



Furthermore, the scarcity effect seems to have a small effect in shops of retailers which offer mostly *Seasonal Ware*. Notably, they state that more customers came to the shop when new inventory has arrived. They specifically express that customers feel like they need to be quick when new apparel arrives to have the full selection of new *Seasonal Ware*. Interviewee 10 describes it like this:

“If some confection sizes are gone, then I can reorder them sometimes but not always. There are customers who say that they always try to come early [when the collection arrives] because then all the pieces are still available” - Interviewee 10

Therefore, the quote shows that there is time pressure on the customer to acquire the apparel which resembles the scarcity effect. Therefore, it seems like the *Seasonal Ware* encourages higher consumption as it usually goes along with discounts at the end of the season and a higher number of customers at the beginning of the season resulting from customers’ want to not miss out on new products. In addition, interviewed retailers which mostly order *Seasonal Ware* and brands with a *Seasonal System* emphasised the characteristics of shopping as a leisure activity and discounts as part of the shopping experience.

4.3.3 Scarcity Effect and Discounts in the *NOS System*

In contrast, interviewed retailers or brands, which mostly use *NOS Ware*, stated they use discounts to sell apparel which will be withdrawn from the product line, however, discounts are not a reoccurring event which is planned twice a year. Thus, they do not see apparel as a seasonal product and are planning to sell a product independently which season. Interviewee 1 makes this statement about discounts:

"I keep the hoodies from winter until they are gone. If that takes until next year, than so be it. They are not going bad." - Interviewee 1

Adding to this, interviewed retailers and brands, which use a *NOS System*, declare that their customer groups often only bought apparel to replace another piece without the aim of shopping being a leisure activity. Interviewees furthermore state that their customers considered apparel also not as seasonal product and bought apparel independently from the season. Although they express that customers were more likely to buy a product if there was a discount on it, interviewees declare that discounts are not marginally increasing their sales volume. Additionally, discounts were not used at a specific time of the year but only for products which are not restocked. Additionally, no scarcity effect could be found in brands which use a *NOS System* as the product portfolio stays the same for several years and thus customers do not feel the pressure to purchase a product quickly. Therefore, the *NOS System* can be seen as the better system to decrease consumption as it has no discounts established in its system and does not motivate customers to purchase more than they need.

5 DISCUSSION

This study explores the perceptions of slow fashion stakeholders on the distribution of apparel. More specifically, this research concentrates on the two represented distribution systems of the *NOS System* and the *Seasonal System* and which one the stakeholders perceive to be more beneficial for the slow fashion industry. The goal is to give insights if a successful agile supply chain in the traditional fashion industry is also the best supply chain for slow fashion and reflect on the findings from the perspective of Fisher's (1997) functional and innovative products based on the demand patterns. In addition to presenting key results and reflecting on these findings in light of the relevant theoretical perspectives, this section summarises the main themes identified.

5.1 A Stakeholders' View on the Distribution Systems in Slow Fashion

This study shows both interpretations of apparel being a functional or innovative product exist in the slow fashion industry and there is no agreement which interpretation is more suitable. Fisher (1997) coined the distinction of functional and innovative products based on the demand patterns. In detail, Fisher (1997) stated that functional products satisfy basic demands and have a long-life cycle among other features. In slow fashion, a functional product is distributed by the *NOS System* from which retailers can order apparel the whole year round depending on the demand of their customers. In contrast, the innovative product has a volatile demand and a shorter lifecycle (Fisher, 1997). It is distributed in slow fashion by the *Seasonal System* through seasonal collections and a pre-order system four times a year to predict the demand accurately and to avoid oversupply. Notably, Fletcher (2010) describes slow fashion as offering more value compared to fast fashion through connecting consumption with pleasure, awareness, and responsibility. Thus, in order to present the perceptions of slow fashion stakeholders on the distribution of functional and innovative products, it is of interest which distribution system fulfils these aspects according to the results of this study. Notably, the results show that depending on the distribution system, the different aspects of pleasure, awareness, and responsibility are fulfilled in a different extent.

In detail, the findings show that the *NOS System* fulfils the aspects of pleasure less than the aspects of awareness and responsibility. Notably, the interviewees found the *NOS System* to be beneficial for the retailer's service, for a longer-wear of apparel and to be more resilient in crisis. Thus, Fletcher's (2010) aspects of awareness and responsibility are fulfilled as the *NOS System* offers

with this a different approach to the traditional fashion industry for a more conscious consumption. Nevertheless, the study demonstrates that depending on the slow fashion customer group, the *NOS System* might not be suitable to fulfil the expectations on looks and the rate of introducing a new product. Thus, the aspect of pleasure and no sacrifices is less represented in this system. Conclusively, the *NOS System* is regarded to excellently fulfil the aspects of awareness and responsibility whereas the aspect of pleasure was not as prioritized.

In contrast, the data suggests that the *Seasonal System* is also regarded by the interviewees to have strategies in place to fulfil the aspects of awareness and responsibility, however, not in the extend as the *NOS System* has. The results show that the interviewed slow fashion stakeholders perceive the *Seasonal System* to fulfil the aspects of awareness and responsibility by using pre-orders, which were regarded as a useful tool to calculate demand. However, Pookulangara and Shephard (2013) found that the focus should be on long-lasting design, apart from focusing on sustainable processes in production in slow fashion. The *Seasonal System* is identified by the interviewed slow fashion stakeholders to make efforts to create a long-lasting design. Nevertheless, the *NOS System* fulfills this aspect better.

However, the data suggests that some slow fashion stakeholders regard the *Seasonal System* as a more appropriate system to compete with the traditional fashion industry in the aspect of pleasure. Even though the *Seasonal System* imitates the agile supply chain in a very slowed down and modified way; the results show that some slow fashion stakeholders identify the system to be more beneficial to fulfil the slow fashion expectations on looks and rate of introduction of new products. Therefore, the results partly agree with the research of Christopher (2000) and Niinimäki and Hassi (2011) that in order to succeed in the competitive fashion markets, new trends have to be continuously introduced which can only be done by copying an agile supply chain of the fast fashion industry. Conclusively, the *Seasonal System* fulfils with the modified version of the agile supply chain the aspect of pleasure better than the *NOS System* does.

Thus, the two distribution systems fulfil Fletcher's (2010) aspects of awareness, responsibility, and pleasure differently. Furthermore, the results of this study indicate that the interviewed slow fashion stakeholders recognise the distribution of functional and innovative products differently depending on the demands of the apparel. In the context of Fisher's research on the distribution of functional and innovative products, *NOS Ware* can be compared to Fisher's (1997) functional products as it satisfies basic demands, and the apparel has a long-life cycle through the incorporation of a long-term design. In contrast, Fisher's (1997) innovative product can be defined as *Seasonal Ware* as the results show that it has a shorter life cycle and a volatile demand which is hard to predict even with the use of pre-orders. Thus, as *NOS Ware* and *Seasonal Ware* are identified to have different demands, the distribution systems can be analysed in the context of Fisher's (1997) suggestions for the design of the supply chains depending on the product strategy.

The results show that the *NOS System* has a supply chain design adapted to its product strategy whereas the *Seasonal System* could improve in terms of flexibility and speed. In detail, the supply chain of the *NOS System* should be adapted to an efficient use of resources and cost reduction according to Fisher (1997). The results show that this is realised by the usage of well-known material in the product development to ensure the functionality of the material and lower costs. In contrast, Fisher (1997) states that the *Seasonal System* should focus on a supply chain design with increased flexibility and speed to be able to respond quickly to unpredictable demand and avoid obsolete inventory and forced markdowns. However, the results show that the *Seasonal System* had surplus stock and forced markdowns at the end of each season. Therefore, the supply chain seemingly had not been efficiently adapted to the product strategy. In detail, Fisher (1997) recommends using a market-responsive supply chain for innovative products. Harris, Compton and Farrington (2010) identified it as supply chain which offers high flexibility, shorter lead-times, and the ability for more variety. This is also supported by this study as the aspirations of slow fashion stakeholders show the aim for a more demand-oriented distribution system with greater flexibility. Thus, in the context of Fisher's (1997) research, the *Seasonal System* needs to adapt its supply chain to a more demand-oriented distribution system in order to avoid surplus stock and forced markdowns at the end of each season.

5.2 A Stakeholders' View on the Quality and Increased Sales in Slow Fashion

This study analyses also the slow fashion stakeholders' perceptions on the effect of quality of apparel on increased sales. The findings show that slow fashion stakeholders saw no difference in the lifespan of apparel of *NOS Ware* or *Seasonal Ware*, thus, both distribution systems are equal in quality. Furthermore, Jung and Jin's (2014) survey findings are confirmed by this study as the data shows that slow fashion customers seek higher quality. However, this study provides new insights as interviewed retailers and brands declared that slow fashion customers have especially high expectation on slow fashion regarding quality in production and use of material. This confirms Jung & Jin's (2014) observation that slow fashion customers search for products which align with their values. Thus, slow fashion customers consume apparel differently in the aspect of an increased interest about the production standard of a piece of apparel. Furthermore, retailers stated that the use of organic materials is an important aspect for their customers to buy a product. They consider it a health-aspect and the slow fashion apparel as non-toxic.

Additionally, it was found that the *NOS System* and the *Seasonal System* have very different approaches to quality in the product development process

and the approach to design. In detail, the *NOS System* used no pre-determined timeline for the release of its products and focused on long-term product portfolios and adding value to them by introducing selected pieces of apparel. Thus, the *NOS System's* approach to quality in the product development process is firstly defined by an increased flexibility through a missing timeline in releasing a product. The aspect of adding value to the product portfolio is a central theme in this study as interviewed brands aim at producing products which added value to the already existing portfolio. Secondly, interviewed brands with a *NOS System* prefer the use of well-known material in the product development to ensure the functionality of the material and a constant performance in the product portfolio. Thirdly, in the *NOS System* very basic designs or colour-variations were used for the apparel to ensure a long-term design. Thus, the *NOS System* ensures quality in its product development and design through these three aforementioned aspects.

In contrast, the *Seasonal System* has a pre-determined timeline for introducing new apparel and focuses on innovation and a continuous improvement process. Firstly, the pre-determined timeline of the *Seasonal System* is regarded as helpful by the slow fashion stakeholders to experiment with new innovative material and to ensure its procurement chain. Thus, the frequent change in the product portfolio is considered as a chance to try different materials and new products without committing to them long-term. This facilitates the use of innovative materials to find new more ecological solutions which emerged as a theme of flexibility. Furthermore, quality is ensured through a continuous improvement process as every new collection was based on the review of the former collection. Thus, the aim is to create an even better new product portfolio every season. However, comparing both systems to their approach to design, the findings show that the *NOS System* is more beneficial in creating apparel with long-term design while the *Seasonal System* is more beneficial in fulfilling the expectations of slow fashion customers for looks and variety of design.

Therefore, this study shows that both systems are perceived by slow fashion stakeholders to deliver high-quality apparel with different approaches to ensure quality in the product development and design. Furthermore, the results of this study indicate that both systems succeed to satisfy the high expectations of slow fashion customers on production and use of material. However, Freudenschnecker & Schaltegger's (2020) state in their research that creating apparel which appeals to customers for a longer time should be one of the main goals of slow fashion. Thus, under the aspect of long-term design, the *NOS System* seems to be more successful as this study shows that it is made for a longer-wear. In contrast, the *Seasonal System* aims at pushing innovation of the fashion industry by using more innovative materials and sees their frequent change in their product portfolio as a chance to try different materials and new products without long-term commitment. Therefore, both systems offer valuable approaches how more sustainable processes can be integrated into the fashion industry.

5.3 A Stakeholder's View on Scarcity Effect and Discounts in Slow Fashion

This study also explores the perceptions of slow fashion stakeholders on the role of the scarcity effect and discounts on increased sales. The results indicate that the scarcity effect and discounts are in fact increasing sales, however, there are also negative aspects associated with the scarcity effect in the slow fashion industry. Notably, the research on slow fashion emphasizes that one of the main goals of slow fashion is the reduction of seasons and trends as customers are averse to the speed (Goworek et al., 2017; Cataldi, Dickson, & Grover, 2017; Ertekin & Atik, 2015). This is confirmed by this study as both systems distance themselves from trends and offered a maximum of four collections per year. In detail, the stakeholders perceive a discrepancy between offering discounts and promoting sustainability. Nevertheless, the results indicate that discounts are a commonly used tool in the slow fashion industry to sell surplus stock and empty storage facilities. Thus, this study indicates that slow fashion stakeholders identify discounts to be in opposition to the slow fashion movement, however, it is a widely used tool to increase sales.

The data suggests the price of apparel as an important selling point and main factor for the use of discounts with slow fashion apparel. Jung & Jin (2014) found the group of slow fashion customers willing to pay higher prices for their apparel if it complies with their personal values. This is confirmed by this study as slow fashion stakeholders perceive the slow fashion customers as more willing to pay extra for slow fashion apparel. However, slow fashion stakeholders perceive slow fashion customers as still very interested in discounts and report customers to buy more apparel when it is discounted. This confirms Joy et al.'s (2012) findings that ethical consumers still practice negative consumption patterns even with a rising concern for environmental issues. Thus, slow fashion stakeholders perceive slow fashion customers as a more conscious customer group which is willing to pay extra for increased sustainability efforts. However, a lower price of a piece of apparel remains an important selling point, which still leads to increased sales according to the interviewed slow fashion stakeholders.

Additionally, this study suggests that the interviewed slow fashion stakeholder regard discounts as necessary feature in the *Seasonal System*. In detail, the *Seasonal System* stakeholders perceive apparel as seasonal product which loses part of its value if it did not get sold in the season it was intended for. Thus, the findings show that the *Seasonal System* uses discounts as established feature to sell surplus stock at the end of every season. Therefore, the *Seasonal System* can be considered in this aspect to excel consumption as the results indicate that the use of discounts increases the chance of slow fashion customers and traditional customers purchasing more apparel. Thus, discounts were identified in the context of the *Seasonal System* as a tool to clear surplus stock after every season and to help with liquidity.

In contrast, the *NOS System* also uses discounts, however, it is not used as an established feature at a specific time of the year. The study shows that slow fashion stakeholders with a *NOS System* perceive the sales of a piece of apparel independently from a season and therefore discounts were only used for products which will not be restocked in the long-term product portfolio. Therefore, these stakeholders do not consider apparel as a seasonal product. Additionally, no scarcity effect could be found in brands with a *NOS System* as the product portfolio remains the same for several years and thus there is no pressure for the customer to quickly purchase a product. Furthermore, interviewed slow fashion stakeholders, which used the *NOS System*, do not perceive discounts as an aspect of a shopping experience. Thus, the *NOS System* can be seen as the more sustainable system in this aspect as it has no discounts established in its system and does not motivate customers to purchase more than they need.

Furthermore, the interviewed slow fashion stakeholders recognise that the scarcity effect exists in the *Seasonal System* and results in increased sales. In detail, the slow fashion stakeholders declare that customers feel the need to visit the shop and purchase apparel quickly at the beginning of the season which describes the scarcity effect. Sharma et al.'s (2009) statement that a scarcity effect, often leads to producing too much variety, overconsumption, and discounts can be confirmed. However, simultaneously, McNeill and Snowdon (2019) research implicates that one of the main challenges for slow fashion retailers is to find a way between the values of slow fashion and the prevalent traditional industry standards. This can be confirmed by this study as interviewed slow fashion stakeholders identify the frequent introduction of new products and discount as part of the shopping experience which brought them increased sales. Simultaneously, they saw a discrepancy between offering discounts and promoting sustainability. Thus, the slow fashion stakeholders perceive the scarcity effect and discounts as increasing sales in context of the *Seasonal System*. However, as discounts are seen as contradictory to sustainability, they are still very rarely offered, and the timing is chosen as late as possible in the season to not contribute to premature discount-battles.

5.4 Limitations of Study

The concepts of reliability and validity are used to assess the trustworthiness of a study. In detail, reliability describes if another researcher could conduct the exact same research and data gathering in order to get similar results (Bryman & Bell, 2011). However, the challenge with this study would be re-conducting the interviews because it could be assumed that some information might be similar whereas some might be different. The perceptions of individuals are not a constant factor, therefore, the stakeholder perceptions might change over time. Additionally, the timing of the interviews during the COVID-19 pandemic might

have influenced the results as people are more risk adverse during crisis (Caceres, Guzzo, & Segoviano Basurto, 2010; Von Hagen, Schuknecht & Wolswijk, 2011; Barrios, Iversen, Lewandowska & Setzer, 2009). Nevertheless, the recording of interviews was used to present the interviewees' statements as accurately as possible, providing the option to review them and ensure the correct understanding of information. Additionally, further research is needed how if the data might change when the COVID-19 pandemic has ended.

Validity describes if the research results are correct and to which extend the study gives the correct answer (Kirk & Miller, 1986; Krippendorff, 2004). To achieve this, several interviewees were asked about their perceptions, to get valid results. However, the main limitation of this study is its limited sample size of 10 interviews which are restricted to the country of Germany. Additionally, as this study is qualitative and aims at providing in-depth insights about the perceptions of individuals, a generalisation is not possible as results might differ with a bigger sample size or in another country. Thus, further research is needed to confirm that slow fashion stakeholders perceive the *NOS System* and the *Seasonal System* as more beneficial for the slow fashion industry depending on the product strategy.

Furthermore, this study has the limitation that only slow fashion retailers are asked for their customers preferences instead of slow fashion customers themselves. This decision was made to gain multiple insights from different customer groups and in different locations in Germany. However, it also resulted in the indirect reflection of slow fashion customers' needs and demands. Furthermore, only slow fashion brands were interviewed which offered their apparel in retail which excludes slow fashion brands which offer their apparel exclusively online. Therefore, these results are only valid for slow fashion brands which offer their apparel in retail and the results might differ when online slow fashion brands are included in the data.

The final relevant limitation of the study involves the novelty of the topic. Slow fashion is still a niche concept, thus there is little academic literature concerning the topic. Additionally, the researcher lacked previous experience in conducting thematic interviews which can have an impact on the reliability of this study. However, a test-interview was conducted before the interview process to get a better understanding of the interview process and the questions were reformulated to suit better the purpose to answer the research questions.

Despite of the limitations, this research contributes to the existing body of literature by depicting the perceptions of slow fashion stakeholders on the distribution of apparel. The findings of this study contribute to a deeper insight into challenges in the slow fashion industry and the slow fashion customer needs.

5.5 Future Studies

As the subject of this study has not been researched before, any future research on the subject should be encouraged. Especially as the concept of slow fashion is fairly new, any research on it and surrounding concepts support the knowledge about the movement. For instance, more research on slow fashion customers is needed as Niinimäki (2011) identified in her research that an understanding of a slow fashion customer is significantly lacking. A better understanding of this customer group would help to better understand consumption patterns and how they can be altered to a more beneficial and sustainable consumption. Furthermore, it would be of interest how negative consumption patterns could be decreased by this group as Joy et al. (2012) found that even with rising concern for environmental issues, negative consumption patterns are still practised by this group. Additionally, as this study incorporated the slow fashion customers' voices in an indirect way through retailers, it would be beneficial to conduct a study in which slow fashion customers are interviewed.

Additionally, it would be of interest to conduct similar studies with another interviewee sample or in other countries to compare results. Furthermore, in-depth case studies exploring the distribution systems of the slow fashion industry might lead to the discovery of more theories to the slow fashion literature. Lastly, an abductive approach could bring new insights as the results could be tested with additional data collection. Thus, different research approaches might help to gain more insights.

6 CONCLUSIONS

This Master's Thesis focus was on the perception of slow fashion stakeholders on the distribution of apparel. It found that slow fashion stakeholders perceive the *NOS System* and the *Seasonal System* as more beneficial for the slow fashion industry depending on the product strategy.

In detail, interviewed slow fashion brands which aim to offer higher quality apparel with long-term design perceive the *NOS System* to be more beneficial. These brands focus less on trends but on satisfying needs. In detail, brands with an *NOS System* use well-known materials in the product development to avoid the testing of new material and for an efficient use of resources and lower costs. Lastly, discounts are not an established feature of their system as apparel is not considered a seasonal product and thus does not lose its value after a season. Therefore, brands with a *NOS System* seem to perfectly fulfil Fletcher's (2010) slow fashion aspects of awareness and responsibility while it fulfils less the aspect of pleasure as it is averse to trends. On one hand, as slow fashion is increasingly more mainstream, this might hinder its growth. On the other hand, depending how the demand for increased effort in sustainable processes grows, the *NOS System* might have a competitive advantage with its higher quality and long-term design.

Interviewed slow fashion brands which aim to bring slow fashion to the mainstream market perceive the *Seasonal System* to be more beneficial for the slow fashion industry. As the *Seasonal System* offers less financial risk and a better planning system for material procurement and production, it supports the growth of these brands. Additionally, this study shows that for interviewed slow fashion stakeholders the *Seasonal System* results in a higher priority with suppliers and production facilities while offering a shared business risk. Lastly, the introduction rate of new apparel and its trend-orientation make it according to the stakeholders better capable to compete with the traditional fashion industry than the *NOS System*. Therefore, brands with a *Seasonal System* also have strategies, for instance the pre-order, to fulfil the aspect of awareness and responsibility. However, as one of the main aims of these brands is to compete with the mainstream, the aspect of pleasure is equally important. However, this study finds that in the context of Fisher's (1997) research, the *Seasonal System* needs to adapt its supply chain to a more demand-oriented distribution system to avoid surplus stock and forced markdowns at the end of the season.

Thus, this study confirms the research of Watson & Yan (2013) of sustainable fashion becoming increasingly mainstream and the likelihood that the *Seasonal System* will remain the more popular distribution system in the slow fashion industry. This is due to the *Seasonal System's* characteristic of allowing an increased priority with suppliers and production facilities and shared business risk and better planning which is useful and needed with a growing sector. However,

the supply chain design needs to be adapted to more flexibility and speed to avoid surplus stock and forced markdowns every season. Conclusively, Ertekin and Atik (2015) state that the current fashion system poses a threat to the quality of life of future generations. Slow fashion is a promising movement to diminish this threat and offer a more conscious approach to the consumption of apparel. This study delivers unique insights from retailers and brands into the slow fashion industry and the needs and demands of slow fashion customers. The findings show how the distribution systems can be optimised which helps the movement to start successfully its way into the mainstream market.

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APPENDICES

Appendix 1: Interview Questions – English

a) General information about the company

1. Please briefly describe or introduce your company.

1.1. Which customers are you trying to target?

1.2. How does your company differ from fast fashion companies?

b) Slow fashion and Consumer Behaviour

1. In your opinion, what is slow fashion?

2. Do you think your company's customers consume clothes differently than fast fashion consumers?

3. How much influence do you (as a company) think you have on the consumption patterns of your customers?

4. What aspects of your company's apparel are in your opinion most important to your customers? For instance: Quality, looks, comfort, timelessness, trendiness

4.1. What type of negative feedback did you receive from your customers on your product portfolio, if any?

4.2. How does your company ensure that its clothes can be worn for several years?

- 4.3. In your opinion, what would need to change in the fashion industry for reducing clothing consumption?
5. How often do you offer discounts on your clothes and do you feel like it has a significant effect on your sales figures?
 - 5.1. Do you feel like your company's customers are less aware of their consumption during discount sales?

c) NOS vs. Seasonal Systems

1. Which distribution system does your company use and why did you decide for this system? (*NOS System, Seasonal System, Mix of both systems*)
 - 1.1. What influence has the location of your company's production side on your distribution system?
2. Do you think that *Seasonal Ware* has on average a lower quality than *NOS Ware*?
 - 2.1. How long is your product development process on average and what you consider as most challenging aspect in the product development?
3. Which distribution system (*NOS* or *Seasonal Ware*) is more sustainable?
4. In your ideal world, how would the perfect distribution system look like?

Appendix 2: Interview Questions – German

NOS-WARE ODER SAISONALE WARE?

Allgemeine Informationen zum Unternehmen

1. Bitte beschreibe oder stelle das Unternehmen kurz vor.
 - a. Welche Zielgruppe möchtet Ihr ansprechen?
 - b. Wie unterscheidet sich das Unternehmen von Fast-Fashion-Unternehmen?

Slow Fashion und Konsumverhalten

1. Was ist Deiner Meinung nach Slow Fashion?
2. Denkst Du, dass die KundInnen des Unternehmens Kleidung anders konsumieren als Fast-Fashion-KonsumentInnen?
3. Was ist Deine Meinung? Wie viel Einfluss habt Ihr als Unternehmen auf die Konsummuster Eurer KundInnen?
4. Welche Eigenschaften von Kleidung ist Euren KundInnen am Wichtigsten? Zum Beispiel: Qualität, Aussehen, Komfort, Zeitlosigkeit, Trends...

Masterarbeitsthema: "The Perceptions of Slow Fashion Stakeholders on the Distribution of Apparel"

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NOS-WARE ODER SAISONALE WARE?

- a. Habt Ihr negatives Feedback von KundInnen hinsichtlich Eures Produktportfolios erhalten? Wenn ja, welches?
- b. Was müsste sich Deiner Meinung nach in der Modebranche ändern, um den Kleidungskonsum zu senken?
- c. Wie stellt das Unternehmen sicher, dass hergestellte Kleidung mehrere Jahre getragen werden kann?
5. Wie oft bietet Ihr reduzierte Kleidung an und bist Du der Meinung, dass dies einen erheblichen Einfluss auf die Verkaufszahlen hat?
6. Bist Du der Meinung, dass Eure KundInnen weniger auf Ihren Konsum achten, wenn es Rabatte gibt?

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NOS-WARE ODER SAISONALE WARE?

NOS-Ware vs. Saisonale Ware

1. Welches Vertriebssystem präferiert Euer Unternehmen und warum? (NOS-Ware, Saisonale Ware, ein Mix beider Systeme)
2. Was ist Deine Meinung: Welche Vor- und Nachteile hat NOS-Ware und Saisonale Ware?
 - a. Was ist Deine Meinung? Hat Saisonale Ware im Durchschnitt eine geringere Qualität als NOS-Ware?
 - b. Was ist Deine Meinung: Ist NOS-Ware oder Saisonale Ware nachhaltiger?
3. In einer idealen Welt: Wie würde das perfekte System für den Vertrieb fairer Mode aussehen?

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