



Developing a communication plan for Leonor Silva Jewellery in order to create brand awareness in Portugal

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Abstract

The following research aims to create a communication plan for Leonor Silva Jewellery to create brand awareness in Portugal. This brand is an author jewellery company inserted in the luxury market. A research was made by focusing on customers' behaviour and the main factors that influence their purchases, followed by an analysis of notoriety and the relationship between the decision-making process and brand awareness when talking about a product with high customer involvement, as well as the relationship between communication and notoriety; then it was decided to analyse the concept of cluster and the advantages that the latter can bring, and Porter's Diamond Model.

The methodology used to answer the investigation question was to elaborate Depth-Interviews, and it used the Gioia Methodology in order to analyse qualitative research. We are able to obtain a classification made of six dimensions: the characterisation of the market, Luxury brands' promise, position, consumer identity, distributional channels and communication strategies. Furthermore, in order to analyse each dimension in a more detailed way, some relevant secondary data was present.

Due to the difficulty of creating notoriety in Portugal to Author Jewellery, an international benchmark was performed for other European markets. This analysis explains that the strategies used internationally are similar to those adopted by Portuguese brands. However, there is more dissemination in these countries regarding a more significant number of specialised trade fairs and events.

Resumo

A seguinte investigação pretende criar um plano de comunicação para a empresa Leonor Silva de forma a criar notoriedade em Portugal. Sendo esta uma empresa de joalheria de autor inserida no mercado de luxo. Assim sendo passou pela investigação sobre conceito de luxo, como é o comportamento do consumidor e quais os principais fatores que influenciam o comportamento de compra, seguido de uma análise sobre notoriedade e qual a relação entre o processo de decisão e de conhecimento da marca quando se fala de producto com alto envolvimento por parte do consumidor assim como a relação entre comunicação e notoriedade. De seguida decidiu-se analisar o conceito de cluster e as vantagens do mesmo assim como Modelo do Diamante de Porter.

A metodologia utilizada para responder à investigação foi a elaboração de entrevistas estruturadas a joalheiros de autor com posterior utilização da metodologia de Gioia para se proceder à análise da pesquisa qualitativa. Foram identificadas 6 dimensões que são a caracterização do mercado, a promessa de uma marca de luxo, posicionamento, identificação do consumidor, canais de distribuição e estratégias de comunicação. Com o intuito de se proceder a uma análise mais detalhada adicionaram-se outras fontes de informação.

Dada a dificuldade de a joalheria de autor criar notoriedade em Portugal procedeu-se a uma comparação com outros mercados europeus. Nesta análise concluiu-se que as estratégias utilizadas internacionalmente são similares às usadas pelas marcas portuguesas, no entanto, existe uma divulgação muito maior nestes países uma vez que há um maior número de feiras e eventos especializados.

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1. Introduction

Leonor Silva (LS) Jewellery is a brand created in January 2017 that has as its core business the production of author jewellery through traditional Portuguese methods and techniques. The jewellery produced by Leonor Silva is much more than an object of adornment. LS, the designer and brand founder, creates unique jewellery pieces with a contemporary language to create a creative interpretation of life with solid messages. She uses humour and irony to convey the message in a surprising and impactful way to provoke emotions in those who wear and those who observe.

Although the brand is relatively recent in the market, it has already built considerable awareness, reputation, and recognition (mainly internationally) due to its innovative standards based on quality and design. Their authenticity and boldness create attractive jewellery in silver or gold, using resins, fabrics, and cork, among other materials, far from trends, with impactful messages.

LS surprise the audience by taking inspiration from cotton swabs, toothpicks, matches and screws, everyday objects to which we do not attribute aesthetic interest, and creates surprising and timeless jewellery with the goal of elevating the role of women in society with strong messages associated. Her creations are intrinsically correlated with what artistically defines LS, representing her form of expression and essence.

Consequently, it has already been rewarded due to the identity and concepts that the pieces reflect, both in Portugal (Winner of the best of Portojoia award -Designer revolution in 2017) and abroad (Collective International meeting award; Excellence design award in Korea Jewellery Design). Nowadays, the brand presents in its portfolio five distinguished collections, and it has been performing in the national and international markets. Nevertheless, the sales are not representative yet and count only the owner who produces the jewellery pieces and two part-time employees who help with communication and some delivery tasks. Moreover, it is important to reinforce that the international market has a higher impact than the national market, 60% and 40%, respectively.

For the international strategy, the brand is present in international fairs and exhibitions such as London Fashion Week, Author (Bucarest), Inhorgenta (Munich), and Artistar (Milan), among others. Besides this, she was her work at KLIMT02, one of the world's largest platforms for contemporary jewellery. Consequently, she already has international clients in several parts of the world.

The products can be found in Serralves Museum, MAAT Museum, and Espaço Exhibicionista Gallery in Portugal. Moreover, the artist presents her work in some exhibitions, such as PortoJoia and Collectiva, and has some digital presence through their social media platforms and website. However, due to the lack of know-how and human resources, Leonor Silva Jewellery did not reach the brand awareness desired in Portugal. This academic dissertation proposes to develop a strategy that enhances Leonor Silva Jewellery to achieve that goal. Consequently, the problem statement was born: **develop a communication plan for Leonor Silva Jewellery in order to create brand awareness in the Portuguese Market.** To answer this problem statement, it is crucial to understand the market where the company is integrated, the strengths and weaknesses and analyse the leading competitors. Moreover, it characterised the consumer and what are the most efficient strategies to reach them. Therefore, some **Key Research Questions** were developed and will guide the investigation with the goal of answering the problem statement of this dissertation.

1. **Who is the customer of the author's jewellery market?**
2. **How does Leonor Silva Jewellery position itself in the market?**
3. **What are the competitors in this market?**
4. **What should be the distribution channels used by the brand?**
5. **What could be the recommended strategies?**

In order to correctly answer this problem, both secondary and primary data will be used.

Regarding primary data, it will be performing in-depth interviews with experts in this market, and seven jewellers. It will be used the Gioia methodology in order to proceed with a rigorous analysis of the extracted information from the interviews. Six dimensions will be identified that will be analysed in detail and complemented with other secondary data sources.

Furthermore, we will analyse other countries such as Italy, France and Germany in order to perceive the strategies that have been used in those countries and can be best practices for the Portuguese market since one of the conclusions of the first analysis is that the Portuguese market seems not to be wholly aware and educated for jewellery author market.

2. Literature Review

This literature review will be divided into three parts. The first focus on the Luxury concept, how consumer behaviour is, the main factors that influence purchases, and finally, some managerial techniques will be explored. The second part marks brand awareness, what it is, the relation between the decision-making process and brand awareness when talking about high involvement products, and finally will present a relationship between communication and brand awareness. The third part presents the concept of clusters and cluster branding as well as some advantages and cluster models, more centred on Porter Diamond Model.

2.1. Luxury

2.1.1. Concept

The concept of Luxury has been present for a long time in society. Nevertheless, the nature of Luxury is constantly changing, which makes difficult the formalisation of a definition. Luxury derives from the Latin word “Luxus”, which means indulgence of the sense regardless of the cost. They present a high ratio of situational and intangible to price, contrasting with a low ratio of functional utility to price (Salehzadeh, 2017). For a brand is considered Luxury or not will ultimately depend on consumer evaluation of that brand. Ko et al.’s (2016) defined a luxury brand as the following: “a luxury brand is a branded product or service that consumers perceive to: (1) be high quality; (2) offer authentic value via desired benefits, whether functional or emotional; (3) have a prestigious image within the market built on qualities such as artisanship, craftsmanship, or service quality; (4) be worthy of commanding a premium price; and (5) be capable of inspiring a deep connection, or resonance, with the consume.

2.1.2. Consumers and luxury brands

Luxury brands promise more than being different; they aim at uniqueness, exclusivity, a high singularity based on history, high taste, exclusive style, originality of designs, creativity, and avoid becoming too classic (Kapferer & Valette-florence, 2016). It is essential to understand what motivates consumers to buy luxury brands and the main behaviours and attitudes. Apart from the demographic variables that impact purchase behaviour, there are factors like social status, uniqueness, brand loyalty and quality, adding the influence of

usability, snob, financial and self-identity value that also influence purchase intentions (Srinivasan, Srivastava, & Bhanot, 2014).

Wiedmann et al. (2009) were able to integrate all relevant value sources about consumers' luxury perception into one single multidimensional model. This model is composed of financial (monetary aspects), functional (core benefits of the product – usability, quality and uniqueness), individual (materialism, hedonistic and self-identity) and social dimension (conspicuousness and prestige).

In the luxury industry, the brand attitude has a direct effect on the perceived value that consequently will affect purchase intentions; in fact, social, personal and functional values are influenced by customers' attitudes toward a company brand (Gurzki, Schlatter, & Woisetschl, 2019).

In luxury consumption is necessary to pay attention to consumers' motivation regarding the reason why consumers acquire luxury brands and can be divided into two types: (1) Extrinsicly motivated consumers - value express and adjustive social cues; (2) Intrinsically motivated cues – value expressed cues in order to communicate beliefs, attitudes and values (Shao, Grace, & Ross, 2019).

2.1.3. Managing Luxury Brands

As seen before, consumer behaviours and attitudes toward luxury brands are very specific, so companies should not follow the traditional marketing strategies. For them to be able to enter and grow in the market, they will need to follow specific marketing rules that will maintain brands' desirability, so managers should pay attention to what operational levels they should use, in particular the price, specific distribution channels and experience and the communication strategies (Kapferer & Valette-florence, 2016).

First, luxury brands must present a strong personal and hedonistic component and focus on brand identity and storytelling in order to create emotional involvement (Kapferer & Bastien, 2009). This brand identity is constructed by symbolic power fostered by the designer's visibility, and they should position their brands more as pieces of art than as products (Paris & Keywords 2012). Second, it is necessary to advertise not only to sell but to communicate the dream. Moreover, the communication is not only for their targets but for everyone, which means

that everyone should be able to recognise the product, and managers should build communication in turn of their rarity and uniqueness (Kapferer & Bastien, 2009; Paris & Keywords, 2012).

Luxury is based on rarity and exclusivity, so managers should be able to balance sales and desirability because it is crucial not losing the feeling that not everyone can possess the product (Kapferer & Valette-florence, 2018).

Another managerial aspect that Luxury brands need to focus on is in maintaining complete control of the value chain, their business is based on a vertically integrated model downstream, where the company operates retail, branding, product design, production control and other activities through its supply chain (Kumagai, Nagasawa, & Kumagai, 2017; Kapferer & Bastien, 2009).

Regarding the distribution channels, it is expected they place their stores in very selective locations to increase the image of limited brand users, and consequently, the brand rarity image can be managed (Kumagai, Nagasawa & Kumagai, 2017; Ko, Phau & Aiello, 2016). Furthermore, developing direct one-on-one relationships with clients is essential, which means personalised interaction and treatment as VIPs (Kapferer & Bastien, 2009).

Nowadays, social media has become an important communication channel for brands. In fact, through platforms, brands can establish long-term relationships with consumers and consequently positively affect consumer brand loyalty when it ensures congruency with brand image and consumers' perspectives (Chu, Kamal, & Kim, 2019; Ko, Phau, & Aiello, 2016). Through their social media, luxury brands should focus on providing entertainment content, customised support and trend-forward since this positively influence customer relationship and purchase intention (Kim, Ko, Kim, & Ko, 2012). Another vital tool in communication for a luxury brand is word-of-mouth since it helps to develop symbolic social status and reduce uncertainty (Chang, Ko, & Leite, 2016; Kim et al., 2012).

2.2. Brand awareness

2.2.1. Concept

Brand awareness is a concept integrated into a broad concept that is brand equity. In fact, brand equity has four components: perceived quality, brand loyalty, brand awareness and

brand association (Aaker, 1991). Keller (1993) described brand awareness as the consistency of brand recognition (ability to confirm prior exposure to the brand when given the brand as a cue) and brand recall performance (correctly generating the brand from memory). Brand awareness is related to purchase intentions since as more easily a consumer recalls the brand in an unaided recall situation, the higher will be the intention to purchasing a brand (Radder & Huang, 2008).

Although brand loyalty has the higher importance in the construct of brand equity and presents some strategic benefits such as gaining high market shares and customers, brand awareness is crucial for brand equity, and every company should evaluate consumer's brand knowledge since it will show the personal meaning that brand stores in consumer's memory and allowed the increase of brand loyalty when customers realised the brand's good image and quality. Moreover, if the product is on top of mind, that will mean that consumers are highly aware of the brand. Consequently, consumers will become more loyal to the brand and spread the word if they are satisfied. Furthermore, that will impact purchase behaviour (Chi, 2009; Shahid et al., 2017; Keller, 2003; Wang, Yang, 2010).

2.2.2. Decision making process and brand awareness

Engel et al. (1995) presented a model of consumer purchase decision-making divided into five steps: (1) problem recognition; (2) information search; (3) alternative evaluation; (4) purchase decision, and (5) post-purchase behaviour. Brand awareness plays an essential role in consumer decision-making since it will influence the decision about brands in a considering set and also it will influence the formation and strength of brand associations making up brand image (Alexandra & Cerchia, 2018; Hutter et al., 2013; Radder & Huang, 2008). Moreover, brand awareness is the first step when considering the hierarchy of effects and will help reach subsequent stages (Hutter et al., 2013).

However, it is essential to perceive the level of involvement of the product since this influences the consumer's decision-making and purchase processes. When we talk about luxury products, we assume there is a high involvement. In those types of products, the consumer needs more time, effort and resources to find information to make a decision and spend more time with the brand. Moreover, there is a higher predisposition for sharing their experience and providing feedback; besides, they may refer the products to others (Pansari & Kumar, 2017;

Suh & Youjae, 2006). Consequently, the role of advertising for high involvement products is more important for creating awareness of the brand and attached importance to other brand elements (Radder & Huang, 2008).

2.2.3. Communication and brand awareness

Nowadays, consumers have access to a considerable amount of information, and it becomes more important to manage efficiently marketing communication tools in order to build a strong brand. Valuable marketing communication ways help consumers obtain brand awareness (Shabbir, Khan, & Khan, 2017). Advertising is extensive and commonly used by marketers to introduce, remind, recall and position their products and services in consumers' minds (Saleem et al., 2015).

Brand communication is a crucial element to assure brand recall and recognition. The awareness is created through consumer's repeated and memorable exposure to the brand elements, so when we increase the communication, we are also increasing the exposure to those elements and reinforcing the brand memory traces, generating a sense of familiarity and creating positive brand attitudes (Langaro, Rita, & Salgueiro, 2015). Several simple techniques can be used for brand recognition since it is only necessary that consumers notice the brand, however, the process is more complex to enhance brand recall since it is necessary to have stronger brand links to the product category (Keller, 2009).

Moreover, communication is the voice of a brand, and it is through her, that the company builds a relationship with the consumer. Furthermore, through marketing communication, the firm will inform, persuade, and remind consumers about products and brands they sell besides associating their brands with other people, places, events, brands, experiences, feelings, and things (Keller, 2009).

Social media is one of the critical tools to create brand awareness since it exposure' consumers to the brand and creates brand value, besides, it increases the consumer's engagement and, consequently, brand awareness (Hutter et al., 2013; Langaro, Rita & Salgueiro, 2015).

2.3. Clusters

2.3.1 Definition

Porter (1998) defined clusters as “geographic concentrations of interconnected companies and institutions in a particular field”. A cluster can be placed in a competitive context where companies will compete and collaborate simultaneously to gain advantages (Boja, 2011). Moreover, these concentrations of industries are connected by knowledge, skills, inputs, demand and/or other linkages (Delgado, Porter, Stern, 2015).

Despite the number of definitions for a cluster, there is one that is important to explore, which is cluster branding, since it aims to build brand awareness, visibility, credibility and loyalty through the process of identification of the identity of a particular cluster and reflect their core value among the target stakeholder (Mauroner & Zorn 2017). Moreover, it discusses how a cluster manages its reputation and achieves a distinctive position based on its identity and what it does more efficiently and is directly linked to strengthening the attractiveness and economic development of the cluster in the long term (Andersson; Solitander; Ekman, 2013).

2.3.2 Cluster advantages

The formation of clusters presents some advantages both from the firms’ point of view and the consumer.

The companies will create a unique firm-level and architectural understanding of how to collect elements to increase competitive advantage in order to have performed above average and create their architectural knowledge through their interdependencies, sense of common interest and geographical identity of the integrated firms (Tallman, Jenkins, Henry, Pinch, 2004). Moreover, participation in clusters creates sustainable corporate development, resources are used more efficiently, costs decrease, and enhanced competition (Yuag, Hsu, Chen et al., 2014).

In the demand part, the creation of clusters will bring some advantages since it will promote the concentration of the customers and, consequently, reduce their search costs and compare price and quality (Kuah, 2002).

Moreover, participating actors may increase their loyalty, trust, name, recognition, and perceived quality through the cluster (Morgan and Hunt, 1994).

2.3.3 Cluster models

Although there are some models of cluster development that focuses on different variables and conditions in this part it will be describe only two models, which are Markusen's, specific the Marshallian cluster once micro-companies mainly characterise the jewellery market and the other model is Diamond of Porter.

Relative to Marshallian clusters, these are characterised by being composed of numerous small, innovative and local firms that are well embedded in the regional system (Ferreira et al. 2012). In this model, regardless of the size and the strength of companies, no one will have the power to control the cluster, which means only the common market and the cluster dynamic define the shape and development (Boja, 2011).

Porter (2000) defined the Diamond model, which is used for explaining regional or national competitiveness through four interrelated conditions: factor conditions (the cost and quality of inputs); demand conditions (the sophistication of local customers); the context for firm strategy and rivalry (the nature and intensity of local competition); and related and supporting industries (the local extent and sophistication of suppliers and related industries). Combining these elements makes it possible to enhance a dynamic and intensely competitive business environment.

3. Methodology

In order to answer the research questions, different methods will be used with the goal to develop a communication plan for Leonor Silva Jewellery to create brand awareness in Portugal.

It will be analysed seven expert semi-structured interviews realised with jewellers in the same market as Leonor Silva. Those interviewees were selected to their expertise, years in the market, activity and having own store that works as an atelier/showroom and sales space. Some of them because the experience of working with galleries and present their work with other jewelleries that act in the same market. Those interviews were conducted to provide insights about the market, consumers, and different communication techniques and increase brand awareness.

	Maria João Bahia (MJB)	Kathia Bucho (KB)	Gatz (GJ)	Tincal Lab/Ana Pina (TL)	Mater Jewellery Tales (M)	Dalila Gomes (D)	Ana Sales (AS)
Own Store	X	X	X	X	X	X	X
Years of activity	>30	6	>20	7	7	9	>10
Activity	Contemporary jewellery	Contemporary jewellery	Author jewellery	Atelier/gallery and shop	Author contemporary jewellery	Jewellery	Author jewellery

Figure 1: Characteristics of the expert interviews. Own Source

In order to analyse the interviews, the Gioia Methodology was used. This systematic methodology enhances a more qualitative rigours since permits the reporting of both informant and researcher voices (Gioia, 2020). These method follows a rigorous phased process (Gioia et al., 2012):

1. 1st order categories – we extract the most relevant information of the interviews without codify and tries to adhere faithfully to informant terms.
2. At the second phase we start to perceive some similarities and differences among the many categories of the 1st order categories obtained and we aggregate in new categories in order to reduce them to a manageable number. It is in the 2nd order analyses where we will

look at the various emerging themes that can help us explain and describe the phenomena we are observing

3. Than we will aggregate those themes in dimensions

4. At least we will be building the data structure by using the 1st order categories, 2nd order themes and aggregate dimensions. The data structure provides a way of understanding how all the terms, themes, and dimensions relate to each other.

The methodology will appear in six dimensions, and in each subchapter of chapter 4, we will analyse in more detail each dimension. In order to have a more solid analysis, we will add secondary data in some of the dimensions.

In the first dimension presented, we will overview the market to perceive what is happening in the Portuguese Market. Moreover, according to a study developed by AORP (2017) and given the importance of the sector in the North, it will be analysed the cluster existing Porto and perceive the advantages for those who act there.

In the second dimension, we will analyse the values that each interview presents, and we will be able to see shared values, such as exclusivity, uniqueness and originality. However, the brand's identity will distinguish one author from another.

Relative to the positioning, we will see how each interview position itself and then develop a perceptual map and describe a possible position for Leonor Silva.

We will use TrendeVision's (2020) data to define contemporary jewellery authors' consumer profiles in the consumer identity. Trend vision is a research centre that tracks socio-cultural phenomena in art, architecture and fashion while uncovering the underlying connections in the jewellery, watches and luxury goods sectors.

Furthermore, it will be used secondary data from INE and Pordata to identify the distribution channels for Leonor Silva Jewellery, and the goal is to find specific places where the company should be present. These locations need to comply with brand values and position, besides being in congruence with the image that the company wants to communicate and maintaining the rarity and exclusiveness principles present.

Regarding the communication, we will analyse the strategies used in the interviews, since the presence in events, the magazines used, the online performance, among other aspects.

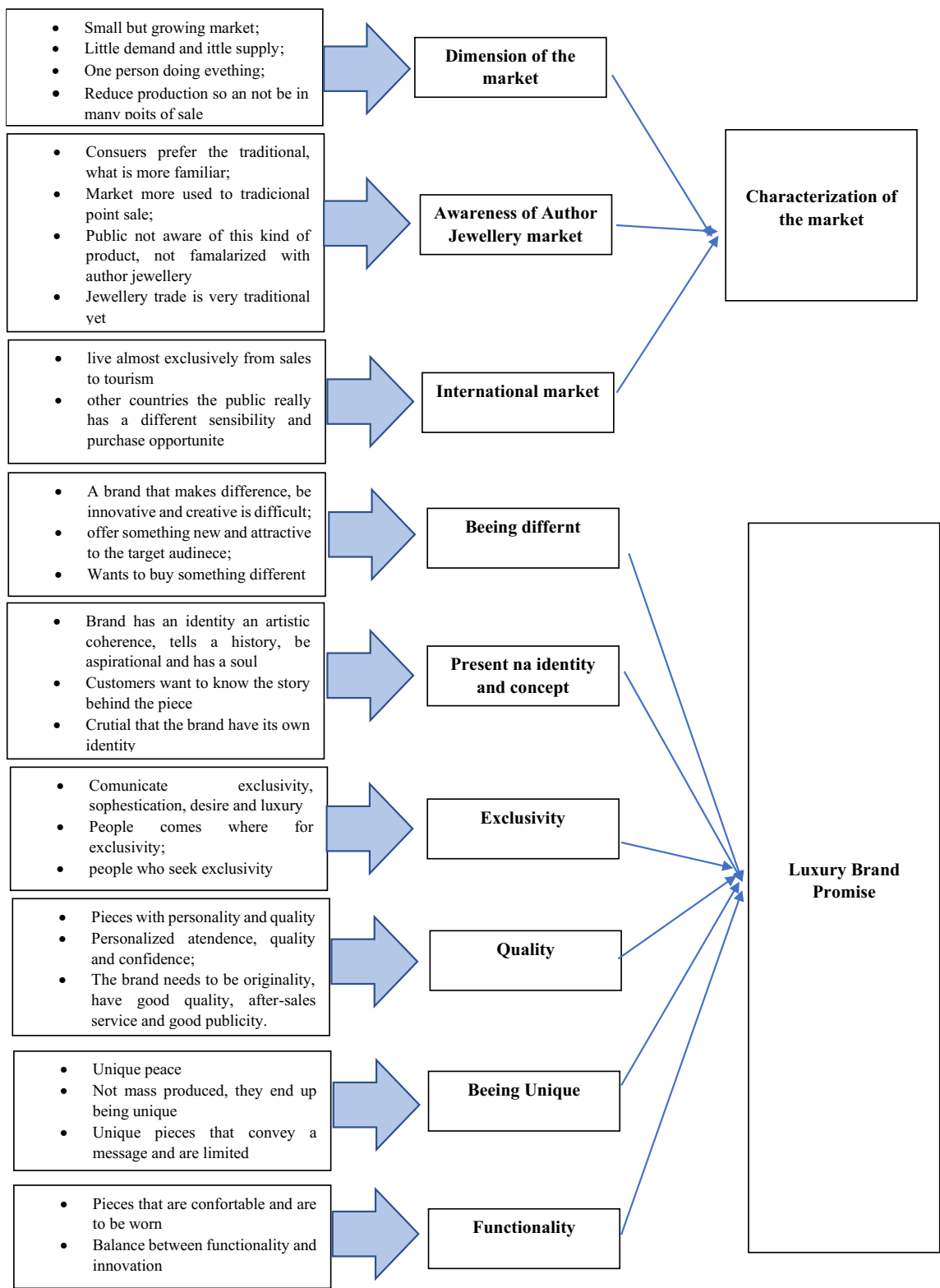
Through the interviews, we will perceive that in Portugal, consumers are not yet educated about this type of product. However, brands, especially Leonor Silva, with more international sales than national, can construct an international reputation. So, we will analyse what is done in countries on the list of leading destinations for export, such as Italy, Germany and France, according to PortugalGlobo, (2019). We will analyse some authors' jewellery and analyse the dynamic of those markets to understand what strategies are best practices and which ones can be applied in Portugal.

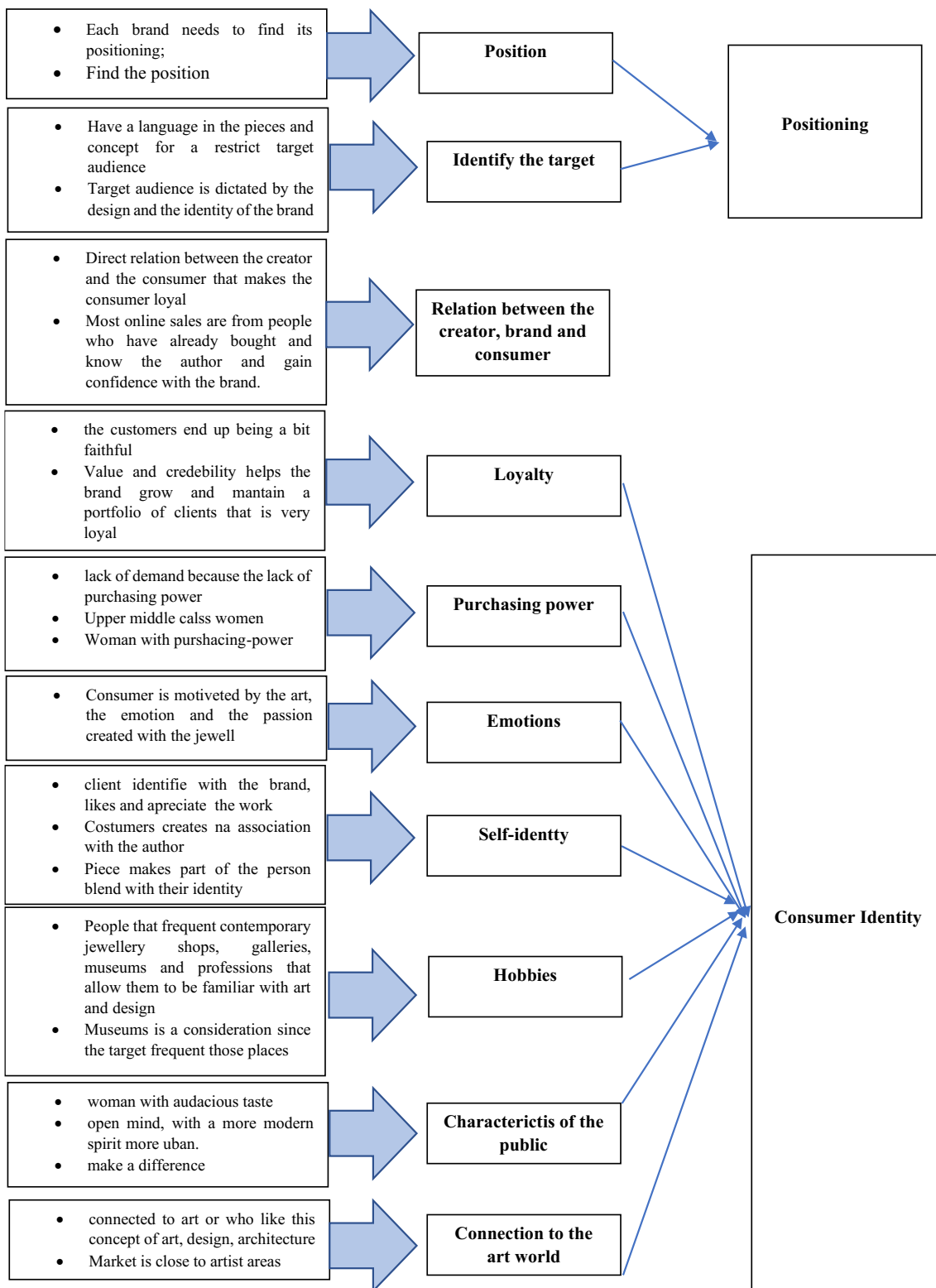
4. Analysis

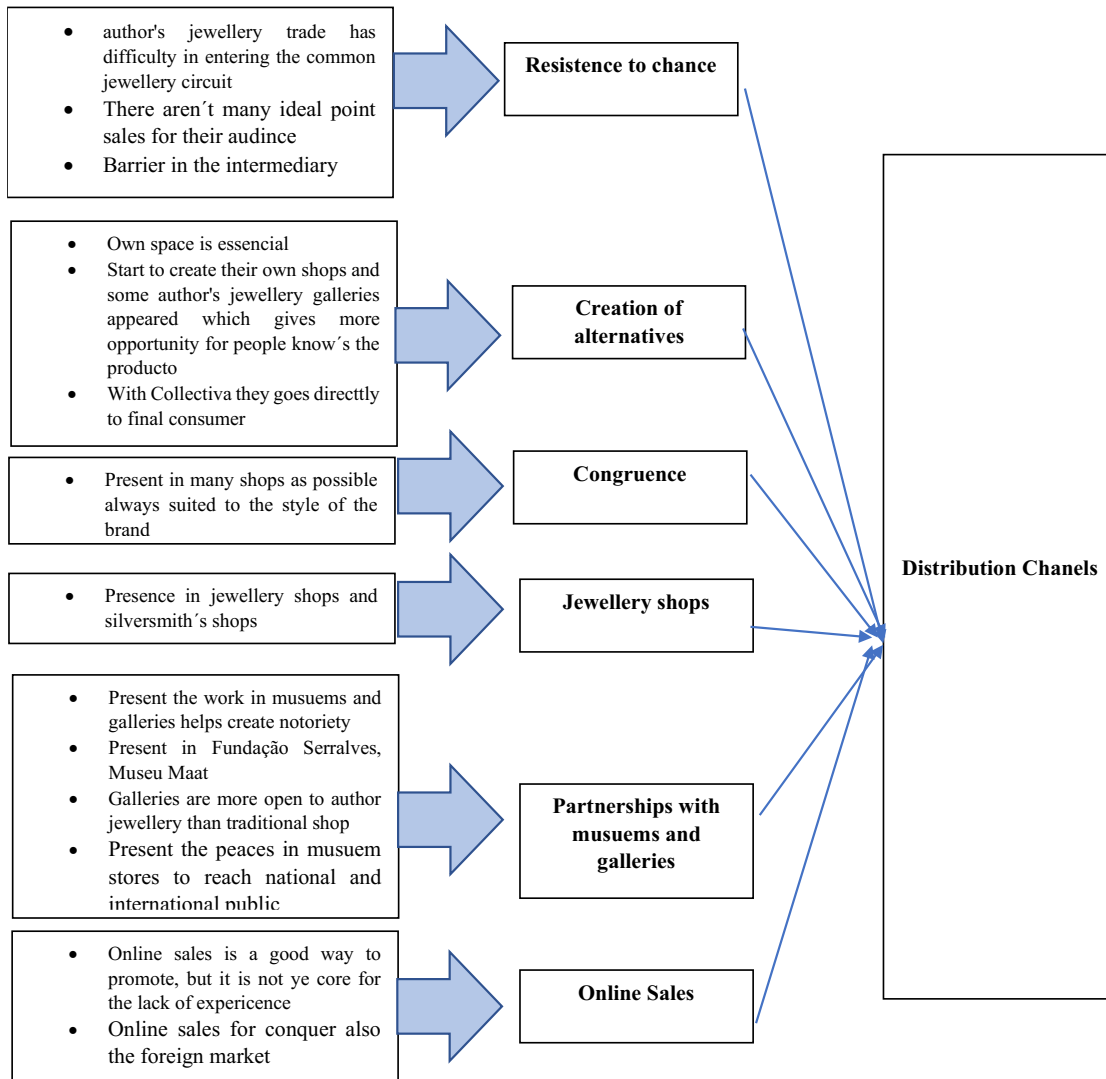
Through the Gioia Methodology the most important statements of the interviews were extracted, and when analysed, they originated 167 1st order concepts that were subsequently organized in 33 2nd order themes that originated 6 dimensions (annex 1.1 and 1.2). In the figure 1 we can see some examples of 1st order categories, the themes of the 2nd order and the dimensions.

The dimensions consequently obtained were:

- Characterization of the market
- Luxury brand promise
- Positioning
- Consumer identity
- Distribution channels
- Communication strategies







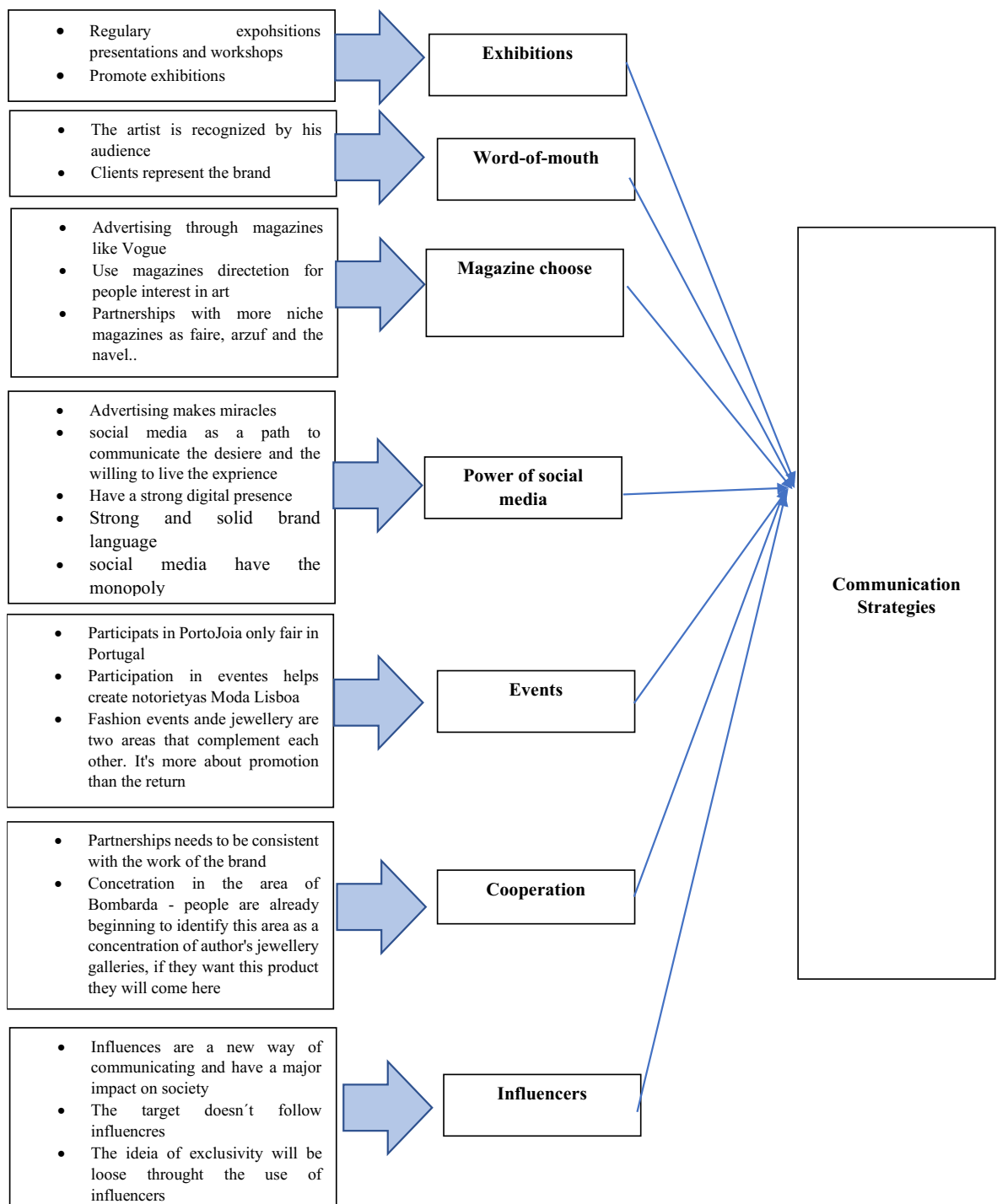


Figure 2: Data structure. Own source First and Second order codes, Source: interviews data

The main findings of the interviews, which will be analysed in more detail in the following sub-chapters, are first the difficulty in entering the market, once the interviewees

consider that the market is not yet educated for the author jewellery but is more familiar with the mass market. Moreover, the target is a niche market with particular characteristics and more related to the art world.

Second, all the interviewees consider it essential to communicate exclusivity, being unique and different to grow in the market. As well as have a solid identity and concept.

It is also verified that due to the difficulties felt by the companies in the market entrance and the characteristics of their public, similar distribution strategies were created, such as the creation of their own shop/atelier and the presence in museums and art galleries.

Furthermore, emerge the theme of cooperation since we will perceive the brands' necessity to collaborate to gain notoriety. For example, one of the communication strategies is to do regular exhibitions with other jewellers with the goal of reaching a higher number of customers.

4.1 Characterization of the market

Through the in-depth interviews, the authors mentioned three themes that enhance the start of this market analysis: the dimension of the market, awareness of author jewellery, and the international market.

Maria João Bahia and Kathia Bucho mentioned that the author's jewellery market is small. Gatz and Mater added the fact that it is also volatile.

All the interviews share a common difficulty: they highlight the fact that the market is not yet educated about these types of products, once it is more familiarized and comfortable with traditional and mass-market jewellery. Because of these, another problem is the low number of sales points, given the difficulty of entering the trade market and jewellery circuit.

Moreover, two interviewees mentioned that other countries have a different sensibility to these types of products and purchasing power, although they did not specify each country. Nevertheless, they referred that part of their sales is from tourism.

Moreover, all the brands' interviews were created or are in the final phase of creating online platforms to reach those international customers.

In Portugal, two associations exist with the aim of promoting jewellery: AORP (Portuguese Jewellery and Watchmaking Association) and PIN (contemporary jewellery association). Both associations have common objectives: promoting Portuguese national and worldwide jewellery by promoting actions (for example, exhibitions, fairs, workshops) that create new audiences and partnerships.

Leonor Silva is already a member of those associations, which is going in congruency with what is done by the other jewellery interviewees. In addition, they are the only associations in the Portuguese market, and these will help the market grow and combat the difficulties that the segment has been experiencing.

According to a study by Deloitte (2020) to AORP Portugal's goldsmith and silversmith sector has kept pace with the growth recorded at international level. From 2015 to 2018, this sector increased by 17% in turnover to €1,049m. Relatively to profitability in 2018 was 8,4% (1.3 percentage points more) and the GVA was 233 M€ (31M€ increase).

In order to be more specific, it's perceived that Leonor Silva Jewellery is inserted in CAE 32122, which means manufacture of jewellery and related products. According to Banco de Portugal: in 2019 there were 365 companies, majority microenterprises (90,78%) that generate a turnover of 47,2M€, 45,25% of the total of the sector, 104,3M€. Moreover, this is a very concentrated sector since the turnover in the 20% largest corporations is 80,4%

Regarding the maturity of the companies, 67,67% of them have more than 10 years of experience and the market and consequently the largest proportion of turnover, 84,31%

Relatively to the geographic location, most of the companies have their head office in Porto region, and it is the region with the highest employment and turnover. We will see this topic in more detail in chapter 4.2, when analyse the existence of a cluster in Porto region.

<i>Region</i>	N° of corporations	% of employees	Turnover (M€)
<i>Metropolitan Area of Porto</i>	260	63	66.231

<i>Lisbon Metropolitan Area</i>	44	13.2	9.283
<i>Ave</i>	29	19.3	19.817
<i>Coimbra Region</i>	8	1	5.737
<i>Others</i>	24	3,5	3.232

Figure 3: Geographic location of companies. Source: Banco de Portugal

Moreover, considering that the exportations are mainly destined for Spain, Hong Kong, Germany, Italy, USA, France, and Switzerland. The exportations have been increasing as a result of the presence of the corporations in various fairs and renowned international events that enables brands to improve their position and gain notoriety. Nowadays, Portuguese Jewellery is international recognized as a high-quality product characterized as an innovative and authentic one. On other hand, the main import markets are France, Spain, Germany, China, Italy, Denmark, and Switzerland (PortugalGlobal, 2019).

Regarding the profitability of the sector from 2018 to 2019 the ROA and ROE have increased by 4,2% and 2,5% respectively. However, the sector continues to have low operating margin, given that EBITDA represents only 6,46% of the turnover since those costs of goods sold and material consumed are 53,7% of turnover.

The funding structure has been improving along the years since the financial debt and the cost of financial debt has been decrease, moreover, the ratio debt/EBITD is five, which means that in average, if the companies maintain their structure of costs and gain, it will take five years to pay all the debt.

4.1.1. Analysis of Porto region

According to the European Panorama of Clusters (2020), there is only a basic-performing cluster located in the north region of Portugal. Nevertheless, the following analysis will focus on Porto since there is an agglomeration of jewellery companies, 71,9% (Banco de Portugal, 2020).

It is possible to identify different types of firms in the Porto region that will work across different parts of the value chain due to their different characteristics. Furthermore, they can

take advantage of these clusters through the prevalence of economies of agglomeration due to economies of scale and networks that have a consequently better attraction of more customers.

The difficulty of entering the market and promoting themselves is that they are organized in groups to reach final clients. Tincal Lab, Collectiva Contemporary Jewellery, Inthependent and Mod Jewellery are clear examples, and they are galleries/ateliers/showrooms. Those spaces were created by designer jewellers that aim to promote their work and, in parallel, other brands, as special designer guests. Moreover, those groups present some expositions and regular events. For example, Collectiva Meeting is an annual event that allows national and international jewellery authors to join in order to promote the talents and innovator works in contemporary Jewellery, to increase the number of customers and sells.

Another factor supporting these clusters is the association AORP (Associação de Ourivesaria e Relojoaria de Portugal), which is committed to promote Portuguese gold smithery and watchmaking through the development of joint actions in markets and helping the sector covering its various areas of activity: industry, retail, wholesale trade and other related activities. These associations organize a high range of events that enhance the promotion of artists and brands. Furthermore, it is a collaboration between north municipal cameras to create a collaborative network of support and involvement.

Despite that, the major national fair also happens in Porto: PortoJoia. These fair counts deal with the presence of more than 150 exhibitors and 10 000 visitors. This presence is a fantastic event for authors' Jewellery to present their work since it is the biggest national fair and has some marketing opportunities since the fair does email marketing and presents the brands on their website. Moreover, brands will be able to show their work and news.

Furthermore, they have a magazine dedicated to the event that will be shared during the fair. PortoJoia also invites ten digital influencers to contribute to the dissemination and increase the notoriety with the final consumer by being perfect ambassadors for the appeal to Jewellery, some bloggers, journalists, stylist fashions editors. In the end, more than 40 communication professionals were present and produced more than 200 press references. A testimonial of Pamela Vieira, a jeweller, said that after participating in PortoJoia 2018, their brand grew about 20% for 2019 and more customers joined it.

Another fair in Portugal is in the North region, Ourindustria, in Gondomar. This fair seems to be an excellent tool for networking since there are multiple conferences and presentations about the jewellery industry. Moreover, it enhances companies' reach to clients once it presents a jewellery show and a ceremony with trophies for innovation/originality and creativity open to the public.

4.2. Luxury brand promise

This dimension refers to the presentation of the high-quality brand as being different, unique, exclusive, and presenting a precise identity and concept.

Through the interviews, it is perceived that brands refer to exclusivity, uniqueness and originality as crucial factors in order to grow in the market. Moreover, the pieces of jewellery need to have a strong message, tell a story that keeps on memory, it is aspirational and has its own soul. It is through these factors that brand creates their identity and concept.

Maria João Bahia adds values like luxury, sophistication, and desire, that must be communicated. Gatz refers to factors like quality, modernity and post-sales services, also fundamental aspects that enhance create notoriety. Mater reinforces that the product needs to appeal to emotion, feelings, memories, and unique experiences.

When a jeweller creates a piece, he/she wants to be different, innovative and creative, as mentioned by MJB, since consumers appreciate different designs and will not blindly follow fashions according to Gatz.

According to all the interviews, each brand needs to have its own identity very clear because in this market, it is not only about presenting the product but also showing a product that conveys a concept and artistic coherence that will permit one to identify the author through the piece.

Maria Bahia	João	Kathia Bucho	Gatz	Tincal Lab/Ana Pina	Matter	Dalila Gomes	Ana Salles
• Exclusivity		• New	• Different	• Unique	• Unique	• Different	• Aesthetic • Design

<ul style="list-style-type: none"> • Sophistication • Desire • Luxury • Identity • Artistic coherence • History • Soul • Be aspirational 	<ul style="list-style-type: none"> • Attractive • Different • Interesting concept • Convey the brand concept 	<ul style="list-style-type: none"> • Originality • Good quality • After-sales service • Comfort 	<ul style="list-style-type: none"> • Exclusivity • Follow the creation process • Different • Identity • Concept • History • Manual production 	<ul style="list-style-type: none"> • Convey a message • Limited series • Exclusivity • Story behind the piece • Identity • Emotion • Feelings • Memories 	<ul style="list-style-type: none"> • Personalized attendance • Quality • Identity • Language and concept • Personality • Functionality and innovation 	<ul style="list-style-type: none"> • Identity
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Figure 4: Values of each brand source: Interviews data

4.2. Positioning

Each brand needs to identify its target audience and find its role regarding positioning. We are in an artistic and volatile market, i.e. each artist has his style, design and language, and consequently, only a niche part of the market will identify with the artist. For example, MJB, Mater and Gatz are more describable as contemporary jewellers, while Ana Pina is a more architectural designer, and Kathia Bucho brings a more ergonomic and geometrical art.

What distinguish one brand from another is the concept behind every jewel, the inspiration, the store tells, and the type of materials used as well.

In the following frame, we can see where some of the interviewees position themselves:

Maria Bahia	João	Kathia Bucho	Tincal Lab/Ana Pina	Mater	Ana Sales	Dalila Gomes
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Pieces as versatile, unique and timeless that use original materials, textures, tones and colors to reflect a strong feminine position	Unexpected, using mechanical structures and geometric forms resultig in an ergonomic art form, “wearable” sculptures for the human body. Moreover, explores and shapes her universe into pieces that reveal a truly independent artistic vision.	Strong abstract and geometric inspiration, in search of modern, versatile and feminine style. Use elements as they were letters building words inserted in a bigger text.	The brand value further comprises co-authored work, commitment and pursuit of excellence. The jewels, on which the values and the inspiration of the brand are well reflected, are made of precious metals, gold and silver, combined with natural stones and precious or semi-precious stones	Creations where nature gains a body, becomes feminine and modern, current and timeless, in a delicate aesthetic	Influenced by architecture she creates geometric and minimalist jewellery that requires rigorous execution
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Figure 5: Position of the brands. Source linked to their websites

When we compare these brands with LS is clear that she also perceives exclusivity and uniqueness as crucial factors to communicate. Regarding the position, she expresses her art in a more contemporary style. Moreover, like other brands, she creates jewels that have a message. In her case, we have jewels with solid social messages, and aims to use the piece as a way to express and reflect the world around us with strong social messages, for example, “Hope” - Brooch dedicated to the refugees; “Nature Mothers Heart” - Necklace that exalts the deterioration and mistreatment of natural resources caused by human evolution; “Happy Birthday Mr President” - Choker that criticizes sexist behaviours. Moreover, she uses humour and irony to convey the message by provoking emotions in those who use the piece and the others that observe. The piece is much more than just an adornment.

4.3. Consumer identity

This dimension has seven themes that the interviews referred to, and enhance the description of who is the customer of author jewellery. Although not everyone emphasizes all themes, the connection between them will allow us to construct a profile of the consumer.

	Maria João Bahia	Kathia Bucho	Gatz	Tincal Lab	Mater	Dalila Gomes	Ana Sales
Self-Identity	The client identifies with the brand	The concept they find interesting		Identify with identity and history of the piece and with the idea of being	Identify the reason for that brand and with the author;	What motivates the purchase is the identification with the brand, with the concepts and	The design and identity are what dictate the

				a manual product; follow the creation process ;	Creates an association with the author	preoccupations; pieces became part of the person, blend in with their identity	target audience
Purchasing Power		Identify the target audience as an upper and upper-middle-class with Purchasing power and the public is between 40 and 75 years old.				The public goes from 35 to 70; It's not a very young public for two reasons because they Still does not value this kind of product and because of is the economic issue.	Upper-middle-class women
Emotions	What motivates to buy is the jewel, the art, the emotions and passions that are created with the object						The aesthetic of the piece
Loyalty					The customers end up being a bit faithful; gain confidence in the brand	A direct relationship between the consumer and the author makes the consumer more loyal, also value and credibility are very much taken into account for maintaining a portfolio of clients that are loyal	
Hobbies		They frequent contemporary jewellery shops, galleries, museums				Having the pieces in museum stores is great because the public visits these place	Target frequent museums
Connected to the art world		Their public ss professions allow them to be familiar with art and design		The public is either connected to art or who likes this concept of art, design, architecture	The target will be closer to the artistic area	My audience is connected to arts, design and architecture	
Characteristics of the public		Women with bolder tastes	Target appreciates different things and is not governed by fashions.	They are women who seek exclusivity; who like design and fashion. people with a more open mind, with a more modern spirit more urban		Does not identify with decorative jewellery.	

Figure 6: Consumer profile in the words of the interviewees. Source: Interviews data

In this dimension, through the interviews, we perceive that the author's jewellery consumers are connected to the art world, linked with arts, design and architecture. It is someone that frequents museums, galleries, and contemporary jewellery shops.

Kathia Bucho refers to the public as an audacious and bolder taster. Ana Pina reinforces this vision by pointing out that people seek exclusivity, want to make a difference, and have a more open mind with a modern spirit. According to Gatz and Dalila Gomes, the clients like design and fashion but do not identify with decorative jewellery and are not governed by fashions.

Considering the intrinsic and extrinsic motivations: the consumer is someone that aims to be different, and who likes the idea of being valuable and unique. Also, they look for emotion and originality, and these motivations align with the values identified in the luxury brand promise.

The consumer is also motivated by the art, aesthetic of the jewel, and the emotions and passions created and transmitted by the piece, according to Maria João Bahia and Ana Sales.

Seven of the six interviews mention the necessity to have a self-identity, which means the consumer desires to set a difference, using jewellery as a form to convey a message and position, and they need to identify with the history that the piece brings, identify with the brand and concepts that the piece transmits. Dalila added that for that reason, each consumer looks for a brand that blends with its identity and creates an association with specific authors/brands.

Mater and Delila Gomes added that because of that association with the personalized attendance and the direct relation between consumer and jewellery, the clients become loyal and gain confidence in the brand.

Moreover, regarding sociodemographic characteristics, only three of the authors refer to women aged between 35 to 75 with purchasing power.

According to Trendvision forecasting, where they associated profiles with the target of jewellery, in their study they identify five consumer profiles for 2020 (Annex 3): it is possible to relate two of them with the brand, which is the intellectual rebel and the spiritualist. Both of them want to transmit a message. The intellectual rebel wants to influence the community

positively and looks for art and subtle retro aesthetics as a way to bring peculiarity, and the spiritualist uses unique jewellery to show their inner world's beliefs and tell a story.

In the interview with LS, she describes that her target are women with an active role in society who are critical of their surroundings. It does not have a defined age target but a maturity pattern. They are determined and daring and like to surprise simultaneously, and they value exclusivity.

Furthermore, it is important to perceive that the pieces of jewellery created by Leonor have a range of prices between 200 and 2000 euros, which means that the target customers have a high purchasing power, possibly belonging to a social class of medium-high and high. Moreover, they will be destined for a class of women who wants to transmit social and impacted messages in society and are familiar with art and design and enjoy it, which means that they should be someone who frequents places such as museums and art galleries or have an occupation related to arts.

4.5 Distribution Channels

In this dimension, six of the seven interviewees perceive resistance in the standard jewellery circuit and barriers in the intermediaries. The jewellers said there are few ideal point sales for their audience, which means there are few spaces directed to this type of jewellery. According to the interviews, this happens because the market is more used to what is familiar/traditional and to the mass jewellery. However, Ana Sales added that with the increase of the author Jewellery market, the stores are becoming more open to them.

To overcome these issues, the jewellers created their own space. All the interviews have their own space. According to them, it is vital to have a centralised space that works as an atelier, manufacturer, permanent exhibition, and sales point. Moreover, they use this space to do some workshops and presentations as referred by MJB, and in the case of Ana Pina, also for a meeting point with other jewellery authors, since she believes this is a method that helps overcome the difficulty to reach clients.

The fact that jewellers own a store allows the brand to meet with the customer and create a connection with them. As we saw before, the customer needs to identify with the brand and

the author, so the own store is crucial for the authors' jewellery. Ana Pina points out the fact that the customer is someone who wants to perceive the story behind the piece and feel like they participate in the creative process. According to two of the interviews, this connection allows to create engagement and loyalty.

Also, some author galleries have started appearing as *Collectiva*, where Mater as their work, to go directly to the final consumer. Moreover, Ana Pina and Mater reinforce that having a space with multiple artists permits to create more sales opportunities and notoriety since it also allows consumers to know about the product and the work of different authors.

Another common factor is that all interviews have an online shop and are present on other platforms. Although the return is not very significant as referred by two of the interviews, primarily because we are talking about products with a high involvement since there is a financial and social risk included, and secondarily because these decisions are closely tied with customer ego and self-image: the interviews found this strategy mandatory in order to reach clients and given the knowledge about pieces. Moreover, Gatz and Mater said that it is a strategy to reach international consumers.

Moreover, the authors' interviews perceive that they can take advantage of being centralised in places with other author jewellers, because they agree that they should expose their work in many shops as possible, but they all refer that the places chosen always need to be suited to the style of the brand. Some of the physical stores in which these brands can be found are *Leitão e Irmão Joalheiros*, *Scared-id store*, and *CCBombardo*. *Galerias 5050*, *Espaço Exbicionista*, among others.

Furthermore, the interviewees perceived that being exhibited in museums and art galleries are also a strategy to consider since the presence in these spaces helps promote the brands because, as we saw in the consumer identity, the final consumer visits these places. Actually, except for Gatz, that does not explore this route since she does not leave the product to consignment and also because she believes that in museums, there is not the necessary professionalism to sell the products; all other jewellers agreed that the museums are a great strategy, not only because they perceive that their target frequents those places, but also because as mentioned by DG, it allows to reach the international public as well.

However, these paths need to be well organised, publicised, and always chosen selectively to be coherent and consistent with the brand, as mentioned by MJB and KB. Ana Pina, Khatia Bucho and Mater work in MAAT, Ana Pina, Khatia Bucho, and Delila Gomes also in Casa da Arquitetura. Moreover, Khatia Bucho perceives Fundação Serralves as a museum that fits with the author's jewellery.

Another strategic point for some jewellers is to be present in jewellery and high-end silversmith shops.

Comparing other brands positioning with Leonor Silva, we can see that Leonor Silva already has online sales through its website and its own space that works as an atelier and exhibition room, and following competitors' practices, it seems she should continue to maintain these strategies in future. However, she could improve by using the space to do some workshops since clients are interested in the creative process mentioned by AP, which enhances explaining the concepts behind the jewels and creating engagement with them as MJB does.

Furthermore, through the interviews, a general difficulty of the brands is to reach their target. There is a familiar feeling that the market is not yet educated to author jewellery market but the mass one. So, the strategy to overcome is not to compete but collaborate. As mentioned in the interviews, they collaborate with other brands through the opening of galleries, and the presentation of other authors in their stores allows the public to become more familiarised with the author's jewellery market. Besides, in the words of AP and Mater, they feel that one of the best strategies for them was to move in CCBombarda, along with the others, since "contemporary jewellery has been concentrating in this area", and customers have already started to identify this area, and know where to look if they want to buy this type of jewellery. There is a sensation that the fact they are closer to each other helps to reach more clients, but in the end, each space presents different products, and each brand has its own identity. Moreover, it is crucial to be present in many shops as possible, but always present that those places need to be congruent with the image that the brand wants to be perceived. For this reason, art galleries and collective author jewellers would be spaces to be considered.

Since Leonor Silva has its head office at Lisbon it should consider the collective author jewelleryes existent there, as Mod jewellery, a Portuguese brand that promotes national and international contemporary jewellery. Moreover, it should present its work at CCBombarda in

order to reach the market in Porto, once this will allow to take advantage of the cluster existing in Porto, that represent most of three quarters of market in Portugal and in addition according to the interviews as Ana Pina and Mater, after changing their work for a space as CCBombarda, allowing them to reach more clients and consequently increase notoriety because of the following reason – it is a space that combines Fashion and Jewellery, Gastronomy, Art and Culture where we can find concept stores and emerging creators; the fact that people already recognise the area as a concentration of author jewellery galleries; and at the CCBombarda, several exhibitions are made, along workshops and some events which enhance to reach a higher range of clients and consequently creates notoriety.

According to Pordata (2020), in 2018 Lisbon and Porto are the regions that have an higher number of visitants in museums, 5.452.664 and 3.620.015 respectively. Moreover, according to INE (2019) the art museums are the most visited in Portugal. Acknowledging this information, Leonor Silva should continue its strategy of being present at Fundação Serralves in Porto and in Lisbon at MAAT. However, it also could present its work at other museums always related to Contemporary Art, since this is her position.

Museu Chiado had an increase of 15,3% of visitants in 2019 (Jornal Economico, 2020), moreover according to Publicos Museus Nacionais (2019) the profile of clients is characterised by a majority of foreigners (53%) in relation to nationals (47%), more than a half are women's and 73% of the public is university graduate. It highlights that almost two thirds of the public work as specialists in intellectual and scientific activities. Relatively to public practices, 83% visit the exhibition and 50% frequent the museum shop.

4.6. Communication strategies

The last dimension is communication strategies. It concerns the exhibitions, cooperation, word-of-mouth, events, magazine choice, social media power and influencers.

All the interviews refer that they do regularly exhibitions and workshops, even in their atelier or in other brands' ateliers. This is correlated to the other theme, cooperation, since, as we perceived before, this market is not a concurrent market but a cooperative market. The strategic collaboration will help brands to increase notoriety was mentioned by Ana Pina and

Mater. Moreover, their work with other artists will allow them to reach a higher number of clients. In the end, no one will take no one place because products and identities are different.

Another essential strategy is the relationship with clients. In this market, the artist is recognised by his audience and the customer representing the brand as mentioned by MJB and Gatz. As we see, the consumer is motivated to buy when it finds a correlation between the identity of the brand and the message that jewels convey. Consequently, the consumer will be the one who will transmit the message to the world, so jewellers need to pay real attention to them and keep word-of-mouth in mind.

Participation in events and fairs is a common strategy used by these brand's interviews. They recognise there is a gap in fairs in Portugal, being PortoJoia the only one currently operating and that fits the target they aim to reach. Iconic, a fair that had place in Lisbon, which only had one edition. Leonor Silva participated in the PortoJoia fair, while winning "Prémio PortoJoia" in the occasion, where his work was recognised among the top eight of the 300 represented.

Regarding the participation in fashion events, the brands see that the collaboration between fashion brands and jewellery is interesting because they are two areas that complement each other. They see the events do not sell directly but promote the brand and attract the audience. However, participation in these fashion shows is expensive, and they do not have the capacity momentarily for that; only MJB already has a collaboration in Fashion Lisboa.

Regarding these thematic, only GATZ present some doubts about the participation of fashion shows since she believes that jewellery needs to be observed calmly and in detail, which is not possible in a fashion show.

Concerning the press, the interviews refer that online magazines should be used to introduce the author and its store, since this helps gain credibility. However, there is a niche market, and Mater chooses more direct magazines for people interested in the art, such as Arzuf and Umbigo. Nevertheless, all the jewels were already mentioned in articles related to the sector as PortoJoia, and JoiaPro.

In summary, the Jewellers should choose magazines connected to fashion, lifestyle and jewels. When realised an analysis through the press will see the interviews were already mentioned in Vogue, Lux, Elle Portugal, Epicur, Trend, Viver o Porto, and Lisboa Cool.

The jewellers' interview perceives social media as an essential tool to help creating notoriety, and MJB strong believes social media has the monopoly of influence. It is precious to have a strong presence on digital platforms with a solid brand language, in order to communicate the product and the concept of the brand. According to this author, it is crucial to transmit the desire and willingness to live the experience through social media.

	MJB	KB	Gatz	Tincal Lab	Mater	Dalila Gomes	Ana Sales
Facebook	X	X	X	X	X	X	X
Instagram		X	X	X	X		X
YouTube	X						
Website	X	X	X	X	X	X	X

Figure 7 Social media platforms. Source: Linked brand websites

Besides MJB and Ana Pina, all the author jewellers present the same information on both social media. However, MJB makes a distinction between Instagram, where she promotes the pieces created by using two types of posts, one that tells the story of the jewellery and the other that describes the materials of the piece; and Facebook, which is more focused on the news, such as appearances in magazines and special campaigns.

Ana Pina makes the differentiation since she has two Instagram accounts, one dedicated to her page where she promotes a style of life, where several photos in Portugal are shared artistically. She also promotes her products and describes the inspiration process, material composition and do reference to where consumers will be able to buy. The other Instagram page is relative to her store, Tincal Lab; on this page, she promotes the authors that have products exposed there, as well as collections and jewels. The Facebook page is fully dedicated to her products; it is the platform that shows the news and exhibitions where the brand will be presented. Concerning the communication, she introduces the creative process behind the pieces and shows the piece with the concept that forms the same.

The other jewels also use social media to communicate their concept and message.

Moreover, they are used as a channel to communicate the news, spaces and exhibitions where be exposed.

Regarding the use of influencers, there is not a standard answer. Although some of the interviewees describe influencers as a new way of communicating and having a significant impact on society and for that reason they are keen to promote their products through them, while others feels that the idea of exclusivity will be lost, and it makes more sense to use it in mass-market than in the author jewellery market.

Moreover, although almost every interviewee perceives that influencers give more visibility to the brand, visibility is not converted into sales, which shows the unstructured work planned with influencers. Also, they refer that they want their work to be recognised and that people choose the brand because they personally identified with them and not because someone influenced them.

Nevertheless, some jewellers prefer not to find someone that could be the face of the brand, because of the ideals and lifestyle of the influencer.

MJB is the one that makes a higher bet on influencers, and she used public figures such as Cindy Brayner, Carina Caldeira, Cristina Ferreira, Paula Lobo Antunes, and Cuca Rosetta, among others.

The brands also use a high range of hashtags, except for Gatz, who is resistant to their use. They all have their hashtags #mariajoabahia, #kathiabuchojewellery, and #materjewellery, among others. MJB also uses hashtags related to the brand's desire to communicate, like exclusivity, uniqueness, and luxury. On the other hand, the other brands use hashtags to classify their products, for example, contemporary, modern and author jewellery.

Furthermore, all the brands have a link to access to their website, and all the brands are prepared to be sold directly inside the webpage. Moreover, Maria Joao Bahia, Khatia Bucho and Tincal have highlighted the press, workshops, sales points, events and collections.

Regarding the website, the most complete page is MJB. We can find a blog section on her website where she shares all the news and most important collections. When opening the collection, a description of the story behind the piece appears and what it wants to convey, how

the idea was the creative process, and the materials used. Moreover, a set of photographs with various pieces and a promotional video can be found in the same page.

Nevertheless, the other brands also present the portfolio and collection with a brief explanation of the inspiration and the description of the jewel, and materials used for its creation.

4.7. Conclusion of the analysis

Through this analysis, we perceive the existence of six dimensions correlated with each other.

In order to grow in the market, the brands need to present exclusivity, uniqueness and originality as crucial factors. Moreover, the jewellery pieces need to have a strong message, a coherent storytelling, and a precise concept.

Regarding the positioning, each brand needs to identify its target audience. What distinguishes one brand from another is the concept behind the jewel, the inspiration, the type of materials used, the store history and the way it is told to customers.

Through the analysis it was possible to identify the customers of the author's jewellery market. They are people connected to the art world who frequents museums, galleries and contemporary jewellery shops. For that reason, the jewellers should choose these places as a distribution channel without forgetting to pay attention to the relation with the brand identity.

Moreover, the jewellery author is someone who wants something different, unique and exclusive. They want to positively influence the community and look for art as a way to bring difference and communicate the world's beliefs and tell a story. Their self-identity is essential, and for that reason, they look for brands that they are used to identify with. For those reasons, the jewellers need to interpret their clients as a communication strategy since it is through them that they will show their identities and the messages that they want to transmit.

It is necessary to have a self-identity since the consumer desires to set a difference using jewellery as a form to convey a message and position in society, and they need to identify with the history that the piece brings, feel the concept and transmit it by using the piece. For that

reason, each consumer looks for brands that blend with its identity and creates an association with determined authors and products.

Regarding the distribution channels, it is clear that brands need to have their product online, although the return could not be very significant. All the interviewees have their own sales website, and some of them also use other platforms to sell. Moreover, all companies present their own space as an atelier and exhibition space.

Furthermore, other jewellery spaces could be used but always pay attention to the congruency between the space and the image that the brand wants to be perceived. Furthermore, the majority of brands agree that exhibition in museums and galleries is a great tool to reach a high number of clients.

Concerning the communication strategies, the brands regularly make exhibitions and workshops, even in their atelier or in other colleges' ateliers. They need to perceive that they are in a cooperative market, and the reality of collaboration between them will allow increasing the value of the brand and the consumer.

Jewellers perceive a gap concerning fairs and events in Portugal, and the only fair happening is PortoJoia. Moreover, they see fashion events as a promising strategy since these are two correlated areas.

Also, online magazines should be used to promote the author, their spaces and products. They should choose magazines related to the niche market and connected to fashion, lifestyle and jewellery.

The jewellers' interviewees perceive social media as an important tool to create notoriety, and they believe social media has a monopoly. They should have a strong presence on digital platforms with a solid and appealing language in order to communicate and explain the product and the concept of the brand, the desire and willingness to live the experience.

There is no agreement regarding the use of influencers since some brands believe that exclusivity will be lost. However, the brand that opts for the path should choose someone that fits the brand in terms of identity, values and lifestyle.

4.8. Analysis of external market

In the analysis, it first becomes clear that brands like Leonor Silva obtain an higher amount of sales to the external market than in Portugal, mainly because of the power of purchase of consumers but also because the Portuguese market is not yet educated about this type of product, having their mind-set more related to the mass market.

As explained before, the exportations are mainly destined for Spain, Hong Kong, Germany, Italy, USA, France, and Switzerland. The following analysis will analyse the Italian, France and German markets since they are higher retails of luxury jewellery in Europe.

The goal is to perceive what is well made outside that may be applied in the Portuguese market to educate the client and create the market itself.

In the Italian market it was possible to conduct interviews similar to the Portuguese ones. As in the Portuguese market, the Italian brands wants to communicate uniqueness and exclusivity since it is what customer are looking for. Moreover, brand identity and storytelling are values that motivate consumers to buy. Furthermore, the strategic communications used are Fairs and festivals, e. g., in Milan the Design week, Fashion week, Jewellery week, pop-up stores, artistic events, and product placement in films and music videos.

Moreover, social medias are also used to transmit coherent communication, and these tools have enhanced small business growth through exhibitions and advertising campaigns. The interviewees consider social media as a crucial point to promote themselves and their creations.

They have a website with a contact form, and in addition to all the products in the collection, we can also find an events section where the public is invited to participate to see the creations with their own eyes, as explained in the interview with (Clizia Ornato).

The online store in Italy is not used much to sell but as a form for clients to see the product and get to know them; this is because the common customer prefers to touch with his own hands and experience the feeling of the product on his skin before buying it.

On the website, we can find the collection with the history and the message that aims to send. Also, it is possible to see all the news. Carlotta, for instance, uses her website as a

channel to sell the product. Moreover, social media is used to promote the product and all the events related to it. It is curious to notice the high amount of events that exist, and in which those companies could participate in increasing their brand awareness.

Regarding sales, they also used the online shop and created its own space. Nevertheless, it presented some partnerships in hotels and high-end clothing shops and used the fairs as a way to sell.

In conclusion, it is perceived that the strategies used in Portugal and Italy are not very different; however, there is a high range of fairs, and that enhances the creation of fame for the brands since some of them are directly linked to contemporary jewellery, which facilitates to reach the final client. Moreover, it used events related to fashion to present its work like Fashion week and Jewellery week in Milan. Moreover, the companies try to take advantage of clusters. For example, in Valenza in Piedmont, considered the capital of high jewellery, many artisans and jewellery stores are well located and it allows to reach a high number of consumers. Furthermore, they also use magazines to promote their works like in the case of Vogue and Preziosa Magazine (jewels magazine), which deal mainly with the art of goldsmithing made in Italy.

Germany is one of the countries with the oldest tradition of Contemporary jewellery. Through the analysis of German jewellers, it is perceived that they use similar strategies as Portuguese brands. They sell the product online and have their atelier. However, they have an intense networking share among jewellers since they use their own space to promote their brands and others and also do several exhibitions together. Moreover, they use galleries and museums to promote their work.

Furthermore, enhancing the increment of notoriety is the existing associations but, more important, the high number of fairs and events existing in Germany; for example, from 2010- to 2016, Klimt02 had registered 175 exhibitions, awards, fairs, book presentations and meetings. Moreover, those events are related directly to contemporary jewellery, enhancing direct contact with the target. For Example, Innhorgenta Munich, which counts 26000 visitors and Munich Jewellery week, pressed by Jewellery Magazine and platform Current Obsession.

When analysing the French market, we perceive that they put a high effort into communication channels, through the presence on social media websites and magazines, events and use of influencers.

Each company's website is a perfect reflection of what the jewellery item represents, a luxury element, in a way as to impress the customer already when visiting the site on what he can expect to find while scrolling the various pages.

Instagram is the most used and profitable social network, used to increase and send a message to the people because brands share and show all the products, and if the customer is interested in them, it is possible from Instagram to access to the website by clicking on a link to see the products in all their details, if there is the possibly to buy the products online or to find a place where the client can buy them.

Another point of strategy of French companies is the significant presence of fashion magazines, mentioned a lot of times in brand's Instagram profile with the apparitions and mentions such as Vogue, Elle (most famous French magazine about trends and fashion) and others.

Moreover, brands use a lot of influencers or public figures such as actors, singers and models that enhance exploiting their social channel and consequently increase brand awareness that converts into sales.

Moreover, the most famous mode event is the Paris Fashion Week, where the famous brands of France or International present new collections and collaborations with jewellery brands, as we saw with Charlotte Chesnais.

5. Conclusion and recommendations

There is a lack of demand in Portugal, and consumers are not educated about these types of products. Nevertheless, when compared to the international market, as a higher performance, it is perceived that the strategies used in Portugal are on the right road to reach the consumer. The big difference between them is that the number of events and fairs related to jewellery in other countries is much higher.

In order to develop the Leonor Silva's communication plan to create notoriety in Portugal, it is primarily necessary to have clarity about who the consumer is, and through the interviews and Trandvision Forecast, it is possible to define them as people that look for feeling difference and having an impact on society. Moreover, they want to be valuable and look for unique pieces of jewellery as a way to convey a message and a story. There is not a range of age to define the group; however, they belong to a class medium-high or high with an essential role in society. Moreover, those consumers are connected to the arts and usually go to museums, galleries and jewellery shops.

Moreover, regarding their role and position, all brands present similarities about it, and they claim to be exclusive and unique. What makes the difference here is the identity, the message conveyed in the piece and the material used. For Leonor Silva, it is crucial to continue representing the image of a contemporary jewellery author that uses strong language, humour, and irony to interpret what is happening in the world to highlight the power of women in society.

Furthermore, since the consumer is not very familiar with these types of products and is still very centralized in the traditional market, brands should consider these markets as cooperative and not competitive ones. The fact that brands promote their work with other artists allows the jewellery to increase notoriety and adds value to the consumer that can reach those authors more easily. Leonor Silva must start to promote her brand to others. So, the recommendation is to promote her product in a colectiva association in CC Bombarda and to exhibit her product in Mod jewellery (a collaboration of jewellery author's in Lisbon).

Furthermore, it would be interesting to call some authors of jewellery to her atelier since these collaborations will be able to increase her notoriety.

It is important to promote the product in CC Bombarda since it is a recognized zone of author jewellery, which will enhance the final consumer's reach. Moreover, the shops in CC Bombarda are run by other jewellers that have the experience and skills to promote the product in the right way.

It is also perceived that museums are a great tool to reach notoriety, and in the last years, the number of visitors has been increasing. Knowing this and having an account of the product and image that Leonor enhances to communicate to customers, it will be advised to continue the exhibitions of her products in Fundação Serralve and MAAT and Museum Chiado.

There is a lack of them in Portugal regarding the events, especially for contemporary and designed jewellery, and that is the big difference from other countries. That is the reason why it is highly recommended to organise collective exhibitions with other authors. However, it is recommended to her to continue her participation in PortoJoia.

Furthermore, social media have been experiencing an always higher impact on society, so it will be recommended to continue presenting her creations on social media platforms; however, here, she should present the inspiration, the history, create emotions in consumers; her creations have powerful stories behind, and the creation process is fascinating. Regarding the influencers, it will not be the most critical strategy for a short time since Leonor Silva's target needs to enhance; she does not follow them, or even the idea of exclusivity could be lost. However, in this case, deciding to use them is important to fit with the brand image, which means that should look for public figures that have a high impact on society and a strong influence in Portugal. According to data from Executive (2018), influencers such as Cristina Ferreira, Joana Vasconcelos, and Paula Rego, among others, could be used for this purpose.

Regarding the website, what could not be lacking is the collection, the history behind it and the materials used, and it is essential to have a sales section, although it is not expected to have a high number of sales there.

Another strategy for creating notoriety is the use of magazines. However, these should be related to fashion and according to APCT(2020), the most sold magazines with mensal prints last year were Happy Women, Revista Cristina, Saber Viver and ELLE. Moreover, according to the interviews, the magazine Vogue should be considered as well as ProJoia and JoiaPro.

6. Limitations

In the literature review, there is not a high range of journals that have publicized about luxury market, especially in Europe and Portugal.

In the analysis, there was a lack of information about the market of author jewellery; when jewellers were questioned about who their consumer is and the best strategies to reach them, they presented some controversial or inaccurate answers since they also tried to find a response to those questions.

The market does not exist yet, and it will be necessary to educate consumers in order to create notoriety and fame.

Moreover, it is difficult to find results that directly present the impact of one action as it increases the notoriety of the brand and, consequently, becomes a trigger to define a clear strategy with values that sustain its value.

Furthermore, it seems that the brands often use the term “author jewellery” in an erroneous way, as they use it to describe their own reality while missing out the point about what author jewellery market really is and what features it needs to have.

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8. Appendix

Annexe 1

1.1. Interview guide

- What are the characteristics that most contribute to the brand's growth?
- How do you characterise the target public?
- What do you think are the factors that motivate clients to buy?
- What strategies do you use to create notoriety here in Portugal and reach a more significant number of clients?
- What types of events do you participate in to reach a more significant number of people?
- Regarding communication techniques, which do you think are more efficient? What message is important to communicate?
 - Social networks and digital marketing - what to communicate?
 - Do you think there is a magazine that helps create brand recognition?
 - Do you think influencers are a good option to create notoriety? If yes, what characteristics should we look for in these influencers?
 - Can participation in fashion events and partnerships with museums and art galleries also help? Which ones?
 - What do you think are the most efficient distribution channels? Presence in jewellery stores, online sales, creation of own space,....?
 - Do you consider this to be a market of cooperation rather than competition? If yes, how does it influence/help cooperation with other jewellers, brands, galleries, etc.?

1.2. Full statements and 1st order concepts

These annex presents a summary of the response to the questions made to the interviews and the 1st order concepts created.

Interviewee	Full statement	1st Order Concepts
MJB	It is still a small but growing market. As you know, globalisation makes everything more exposed, the access to information about what is done in the world is so easy, that to have a brand that makes the difference, that is innovative, creative, is very difficult.	Small but growing market.
		Globalization makes exposure, the access to information about what is done in the world is very easy.
		For a brand that makes difference, being innovative and creative is difficult.
MJB	It is essential that a brand has an identity, has an artistic coherence, has a history, is aspirational, and has a soul. What motivates to buy is the jewel, art, emotions and passions that are created with the object	The brand has an identity and artistic coherence, tells a history, is aspirational and has a soul.
		The consumer is motivated by the art, the emotion and the passion created with the jewels.
MJB	The best strategy is for the client to identify with the brand, like our work and appreciate	The client identifies with the brand and likes and appreciates the work.
MJB	I do debates on various topics, regularly create new pieces, and make several presentations, workshops, and strategic partnerships.	Regularly expositions presentations and workshops
		Have strategic partnerships
MJB	For our brand, we communicate exclusivity, sophistication, desire and luxury.	Communicate exclusivity, sophistication, desire and luxury.
MJB	Through social media, we communicate the desire and the willingness to live the experience.	Social media as a path to communicate the desire and the willingness to live the experience.

MJB	Social networks today have a monopoly. It is also important, that everyone has to find their own position.	Social media have the monopoly. Each brand needs to find its positioning.
MJB	Customers are the only ones who give us recognition. It's like in other art forms; the artist is recognized by his audience.	The artist is recognized by his audience.
MJB	Influences are a new way of communicating and indeed have a major impact on society. I think that each brand has to find the person who best fits its ideals.	Influences are a new way of communicating and have a major impact on society. Each brand must find the person who best fits its ideals.
MJB	Partnerships are a great strategy but need to be consistent with our work.	Partnerships need to be consistent with the work of the brand.
	It is important that each brand find your position	Each brand needs to find its position.
KB	With little demand, the means are scarce, and the evolution is compromised. The lack of demand for this type of jewellery comes from the lack of purchasing power, which not only literally inhibits the act of buying but also does not favour the education of our public for the arts, quality design and for bolder forms and concepts.	Small market, i.e. little demand and therefore little supply.
KB		Lack of demand, because the lack of purchasing power.
KB	Because even if the purchasing power is then obtained, the public tends to opt for the traditional, for what is visually more comfortable and with which they are more familiar. In other words, the horizons are not broadened by a lack of means and make the tastes more basic, and the more conceptual products are not well accepted.	Does not favour the education of our public for the arts, for quality design and for bolder forms and concepts.
KB		Consumers prefer the tradition because it's more familiar.
KB	In terms of design, it is the attempt to escape what already exists on the market. The offer of something new and, at the same time, attractive to my target audience. In terms of market expansion, it's the attempt to present my brand in as many shops as possible, always suited to the style of the brand, of course.	Escape for what already exists, offer something new and attractive to the target audience
KB		Present in many shops as possible always suited to the style of the brand
KB	My target audience is the upper and upper-middle class and is between 40 and 75 years old. They are women with bolder tastes and purchasing power.	The target audience is the middle-upper class between 40 to 75 years old
KB	They frequent contemporary jewellery shops, galleries, museums and professions that allow	Woman with an audacious taste

KB	them to be familiar with art and design, precisely a small niche.	Woman with purchasing-power
KB		Small niche
KB		People who frequent contemporary jewellery shops, galleries, museums and professions that allow them to be familiar with art and design
KB	What motivates people to buy is the fact that you can buy a piece of jewellery with different lines from what you have seen and accompanied by a concept you find interesting.	Wants to buy something different
KB		Jewel with an interesting concept
	To reach clients I need to be present in as many physical shops as possible that dignify the brand and have a strong presence on digital platforms, with a strong and solid brand language.	Present in many stores as possible but always in coherence with the identity of the brand
KB		Have a strong digital presence
KB		Strong and solid brand language
KB	At the moment, there are no events. I have participated, for example, in Iconic, in Lisbon. A very interesting fair, for conventional and contemporary jewellery, but which unfortunately happens only once a year and I have also participated in Portojoia, which fits my brand and is the only one in Portugal at the moment. Internationally I've never participated, as I haven't seen that need yet.	Lack of events in Portugal
KB		Participation in PortoJoia only fair in Portugal
KB	I think it is important not only to show the product but also to convey the brand concept.	Not only to show the product but also to convey the brand concept.
	Social media is important to communicate the concept and the feeling. What is sold is essential one image and feel	The use of social media in order to communicate the concept and the feeling sells an image.
KB	Unfortunately, I don't think there is any magazine programme that effectively helps brand recognition. Of course, anyone can help a little, but none really has a significant "weight" in the area.	Any magazine can help a little in brand recognition but none that really has a significant "weight" in the area.
KB	For my brand influencers are not an option, since my target usually does not follow them	The target doesn't follow influencers

KB	Participation in events and partnerships with museums and galleries can help create notoriety. The Fundação Serralves, Maat museum and Lisbon Fashion, for example. But any art gallery, museum or event can help as long as it is well organized and publicized	Participation in events and partnerships with museums and galleries helps create notoriety
		Fundação Serralves, Museu Maat, Moda Lisboa
		Any art gallery, museum or event helps to create notoriety since well organized
KB	It is important to be present in jewellery and silversmiths as the own space is crucial. The creation of an online shop is mandatory, but the return is not significant for my type of product, taking into account the price and my target audience.	Own space is essential
KB		Presence in jewellery shops and silversmith's shops
KB		Online shopping is mandatory but the return is not significant because of the price and the target audience.
GJ	I have had this activity open for 20 years and have therefore gone through several phases it is important to act quickly to create other sales opportunities. I live almost exclusively from sales to tourism, both myself and the shops that represent my work.	Live almost exclusively from sales to tourism, even the brand and the shops that represent the work of the brand
		Act quickly to create a sales opportunity
GJ	The Author's Jewellery market is a very difficult area in this country. The economic partners, goldsmith's trade, is currently not very receptive to its acquisition. Because most shopkeepers are not part of the niche market group that appreciates a different design, they tend to follow fashions.	The author's Jewellery market is very difficult in Portugal. The economic partner's goldsmith's trade is not very receptive to its acquisition
GJ		Niche market
GJ		Appreciates different design
GJ	For my increase is necessary to be original, as good quality, good after-sales services and good publicity	The brand needs to be original, have good quality, after-sales service and good publicity.
GJ	My target appreciates different things and is not governed by fashions, for my increase is necessary to be originality, as good quality, good after-sales services and good publicity.	Appreciate different things and are not governed by fashions
GJ	People want to buy my pieces because of the originality and comfort	Buy because of the originality and comfort of the pieces.
GJ	The clients are the ones that represent my brand	Clients represent the brand

GJ	I think advertising makes miracles, and being able to advertise in magazines like Vogue could help in the creation of brand recognition. But the economic constraints do not allow it. I believe that some programme can help if it has the target audience as their assistance, but I think it is a very volatile situation.	Advertising makes miracles
GJ		Advertising through magazines like Vogue
GJ	I believe influencers it is one more option for propagation because most people, instead of their own opinion, are influenced.	Some people instead of having their own voice follow influencers
GJ	In my opinion, fashion events are directed at clothing and not at jewellery since jewellery needs to be observed calmly and in detail, which is not possible in a fashion show. Galleries and museums I know are a market route for a colleague, a situation that I have never explored because I have to leave work for consignment, which I do not do. And also, because there is not the necessary professionalism to sell this article there (it is necessary to see a measure to be able to ask for it) and the sales would result only from what would be exposed.	Jewellery needs to be observed calmly and in detail which is not possible in a fashion show
GJ		Galleries and museums are a market route but don't do because need to leave the piece in consignment and believe there is not the necessary professionalism to sell the piece
GJ	For me, the opportunity is to conquer the foreign market and the online business. To participate in international fairs for professionals abroad is necessary a large investment, which I do not have the capacity for at the moment). For this reason, it will be my best at the moment to develop online sales. Having your own shop is ideal. The presence in jewellery shops is fundamental for me.	Online sales to conquer also the foreign market
		Have own shop is ideal
		The presence in jewellery shops is fundamental
TL	We have our brand, but then we have Tincal which works as a workshop and shop. One of the most important European fairs for artistic jewellery was to take place in Munich, and it was cancelled.	Have the brand but they have Tincal Lab which works as a workshop and shop
TL		One of the most important European fairs for author jewellery is in Munich
TL	The greatest difficulty is that in most cases, we are just one person doing everything, and no one hand it's good because we control the whole process, and that gives us more gratification, design and produce the pieces themselves, but then we get to the point where we can't be good at everything from the moment we have to communicate with customers with shops, photography, social	One person doing everything
		There aren't many ideal point sales for their audience
		Market more used to traditional point sales, goldsmith shops

	networks, we end up accumulating many functions, and it's difficult to respond to everything. Another difficulty is finding our ideal audience, and there aren't many points of sale ideas for our audience. The market is more used to the more traditional points of sale, to goldsmith shops, after some design shops started to appear, more recently we started to create our own shops, and some author's jewellery galleries appeared. These galleries are what give more people the opportunity to know the product. Most of the public is still not very aware of this kind of product, and it is not familiarized with author jewellery. The people who know sometimes don't know where to buy only know that it exists online but want to see it live and there are not many places where they can have this opportunity, also because the production is reduced and you can not be in many points of sale	Start to create their own shops and some author's jewellery galleries appeared which gives more opportunities for people to know the product
		Public not aware of this kind of product, not familiarized with author jewellery
		The public wants to see the peace alive but there are not many places because the production is reduced and you cannot be at many points of sale
TL	Our public is women who seek exclusivity on the one hand but who identify with the idea of having been a person to create that piece, who follow the creation process from the beginning to the final piece, and this attracts some people because they realise that it is a unique piece even if it is repeated it will never be the same. They look for the story behind the pieces because normally when we create, we develop pieces and collections that have a concept, and people end up identifying more with that concept, and it is not only the aesthetics that matter. They are people who identify with the piece's identity and history and the idea of being a manual product. It fits in many areas, from people who like design and fashion. People with a more open mind, a more modern spirit, and more urban. They are people who are either connected to art or who like this concept of art, design, architecture	People who seek exclusivity
TL		Follow the creation process from the beginning to the final piece
TL		Unique peace
TL		Identify with the identity, concept and history of the piece and with the idea of being a manual product.
TL		From people who like design and fashion.
TL		People with a more open mind, with a more modern spirit more urban.
TL		People who are either connected to art or who like this concept of art, design, and architecture.
TL		People buy our pieces to make a difference, and because they are not mass-produced, they end up being unique
		Not mass-produced, they end up being unique
TL	We feel we are in a trial and error regarding the strategies to reach clients. But nowadays, the internet is a very important tool because of social networks; websites are also easier to reach a large number of people and an international public	Turns out to be trial and error.
TL		Internet is a very important tool because of social networks and with sites is
TL		

		easier to reach a large number of people and the international public.
TL	Here we are trying to promote exhibitions; when we are in Bombarda, we have simultaneous inaugurations that take place twice a year, which is an event that involves the art galleries and shops here in the area. We take the opportunity to launch new exhibitions here on our wall and invite new authors. For two years now, contemporary jewellery has "been concentrating on these areas through collaborations. If there were only our shop, they would end up buying here, and so customers would disperse, but on the other hand, people are already beginning to identify this area as a concentration of author's jewellery galleries if they want this product they will come here. We help each other since we are close to each other's, but in the end, each one in its spaces has different products and different identities and different brands, and this ends up being good for us and for the public.	Promote exhibitions.
TL		Bombarda an event that involves the art galleries and shops in the area and takes the opportunity to launch new exhibitions.
TL		Collaborations.
TL		Concentration in the area of Bombarda - people are already beginning to identify this area as a concentration of author's jewellery galleries, if they want this product they will come here.
TL		each one in its spaces has different products and different identities and different brands and this ends up being good for us and for the public.
TL	There are some jewellery fairs, but in Portugal, they are not yet tailor-made. There is PortoJoia which is a reference fair for jewellery. In the last few years, it has included some jewellery of the author, but it is still very focused on the industry. I have already participated and noticed that the public is still not very intruded in the concept, it will be time to adapt to us because they go directly to known brands. There is a lot of difference between us and the mass jewellery and there are still not many specific fairs for the author's jewellery, in Portugal, there aren't any, in Europe, they start to appear but they end up being too artistic and different from what we do and it is very expensive to participate in these events In other countries the public really has a different sensibility and purchase and it is positive to deal directly with them.	In Portugal, there are some jewellery fairs that are not yet tailor-made and not specific to the author's jeweller.
TL		PortoJoia is a reference fair for jewellery. In the last few years, it has included some author jewellery, but it is still very focused on the industry.
TL		The public is still not very intruded in the concept, it will take time to adapt to us because they go directly to known brands.
TL		In other countries, the public really has a different sensibility and purchase opportunity.
TL		
TL		
TL		It is always good to go out in magazines and articles but I don't know if it makes much difference today because people no longer see so many magazines. However, they help to give some credibility to the brand and the space

TL	<p>Many brands choose this path of using influencers and apparently it works because the visibility level is quite high. I am always in doubt as to whether this really translates into naked added value in terms of sales or not. Personally, I don't go there much because I don't identify with this way of seeing, I prefer that people like the product because they like it and not only because they've seen someone use it and as it is someone important I want it too. And also because I think the idea of exclusivity is lost, I don't identify with the influences.</p>	<p>Influencers work because visibility level is higher however doubt that presents value in terms of sales</p> <p>I prefer that the people like the product because they like it and not only because they've seen some influencer using it.</p> <p>The idea of exclusivity will be loose through the use of influencers.</p>
TL	<p>Events are great; Lisbon Fashion and Portugal Fashion already have some collaborations between brands of author jewellery. I've never collaborated in fashion, but it can be interesting because they are two areas that complement each other. It's more about promotion than the return. It can help to attract the public.</p>	<p>Lisbon Fashion, Portugal Fashion already has some collaborations between brands of author jewellery.</p>
TL	<p>Events are great; Lisbon Fashion and Portugal Fashion already have some collaborations between brands of author jewellery. I've never collaborated in fashion, but it can be interesting because they are two areas that complement each other. It's more about promotion than the return. It can help to attract the public.</p>	<p>Fashion events and jewellery are two areas that complement each other. It's more about promotion than the return.</p>
TL	<p>I have an online shop associated with my brand's website and Tincal. It's not that the sales are in great quantity, but they are existing and they are sales that would never exist in other ways, for example for foreigners. In Portugal, there is still some fear of online shopping but they are beginning to be sales.</p>	<p>Online shop, even if the sales are not high allows to sell to foreigners.</p> <p>In Portugal there is a fear of online shopping but already start to happen.</p>
M	<p>There is always a market, the great difficulty is to know where it exists, where it is where it moves. It will be closer to the artistic areas. The author's jewellery market is very volatile, it is quite complicated for brands to implement in Portugal.</p>	<p>Difficult to know where the market exists and where it's moving. The author's jewellery market is very volatile.</p> <p>The market is close to artist areas.</p>
M	<p>Difficulties can be entering the trade. The jewellery trade is still very traditional, so the author's jewellery has difficulty entering the common jewellery circuit, so it has to look for alternative commercial circuits. This is the difficulty and the opportunity and is what happened here. Here all authors of author's jewellery who found it difficult to enter the trade decided to open what be a collective of authors to have a point of sale of their own brand.</p>	<p>The jewellery trade is very traditional.</p>
M		<p>Author's jewellery trade had difficulty entering the common jewellery circuit, so it had to look for alternative commercial circuits.</p>
M		<p>Author's jewellery trade had difficulty entering the common jewellery circuit, so it had to look for alternative commercial circuits.</p>
M		<p>Authors of author's jewellery who found it difficult to enter the trade decided to open what to be a collective of</p>
M		<p>Authors of author's jewellery who found it difficult to enter the trade decided to open what to be a collective of</p>

		authors to have a point of sale of their own brand.
M	We do unique pieces that convey a message and are limited series. You can reach the status by the exclusivity of the piece because you know you won't find that piece because this is not a mass mark. Who comes here is for exclusivity. The play is a code that, through it, the person transmits a message.	Unique pieces that convey a message and are limited.
M		People come where for exclusivity.
M		The piece is a way to transmit a message
M		
M	We have two audiences, which are the final customer and the intermediate, which are shops and galleries. The gallery is more open since they are used for author jewellery, the traditional shops are the ones that already have more difficulty in opening what will be the author's jewellery. We feel this barrier that is not exactly the final customer but is the intermediary who wanted with the collective was to jump this point and go directly to the final customer.	Galleries are more open to author jewellery than traditional shops
M		Barrier in the intermediary
M		With collective they go directly to the final consumer
M		
M	Customers want to know the story behind the piece. From experience, the customers end up being a bit faithful, they choose 2 or 3 authors and then we walk around a lot, although they can be completely different authors. They identify with the reason of that brand and with the author and then vary their 2 to 3 authors or even only one but create an association with that person.	Customers want to know the story behind the piece
M		The customers end up being a bit faithful
M		They identify with the reason of that brand and the author
M		Costumers create an association with the author
M	We have some partnerships even in the ambit of this international exhibition. We have some partnerships with faire, Arzuf, the Navel, are more niche magazines but where some reports have already been made about the authors and the collective. Magazines for people interested in art	Partnerships with more niche magazines as faire, Arzuf and the navel.
		Reports about the authors and the space.
M		Use magazines direction for people interest in art
M	I don't believe in influence, I think there are many, but with unstructured work. An influencer is probably more prepared for a mass market and not for this, because if someone wants exclusivity this seems a bit contradictory.	There are many but with unstructured work.
M		Influencers are more prepared for the mass market.
M		To use the influencers is contradictory since customers look for exclusivity.

M	We have some partnerships even in the ambit of this international exhibition. We have some partnerships with faire, Arzuf, the navel, are more niche magazines but where some reports have already been made about the authors and the collective. The magazines are more directed to people who like art. The museums and galleries are also a good option, for example I developed a piece for MAAT and it was thought in a strategic way yes because it was the MAAT and received many visits because it was a museum that I identify with and that is related to arts and technology, much of the jewellery that I do combines the two so it seemed for me a good place to promote and when the possibility to make a partnership arose I decided to go.	The museums and galleries are also a good option to promote brands.
M		I developed a piece for MAAT and it was thought in a strategic way yes because it was the MAAT and receives many visits, because it was a museum that I identify with and that is related to arts and technology, much of the jewellery that I do combines the two.
M	Selling online is a good way to promote, there are some online sales but it is not the core for the lack of experience. Most online sales are in Portugal but they are people who have already bought and know the author and gain confidence with the brand.	Online sales are a good way to promote, but it is not yet the core of the lack of experience.
M		Most online sales are from people who have already bought and know the author and gain confidence with the brand.
D	People are looking for something different, and this is an opportunity for author jewellery.	People looking for something different.
D	The difficulty is that the public still compares the author jewellery with the mass market because the pieces are produced on a large scale and using processes that allow to reduce costs and sometimes it is difficult to compete with these brands. There is always the customer who knows how to distinguish the markets, but there is also still a lot of the customer who only takes into consideration the price factor and does not understand why the piece of author jewellery has a price so different.	Compares author jewellery with a brand of industrial jewellery that allows reducing the price, and does not understand the difference in the price.
D	Each brand needs to find his position.	Find the position.
D	The main characteristics are personalized attendance, quality and confidence in the brand because they contact directly with the creator.	Personalized attendance, quality and confidence.
D	There is a very direct relationship that makes the consumer feel confident and looks for the brand regularly since he ends up being loyal because there is a relationship of trust. We are in a market	The direct relation between the creator and the consumer makes the consumer loyal.
D	in which the value and credibility are very much taken into account. This is what helps the brand to grow and to maintain a portfolio of clients that is very loyal.	Value and credibility help the brand grow and maintain a portfolio of clients that is very loyal.

D	The brand has to have its own identity, this is crucial. You don't want to do everything and please every client. I know perfectly well that I have a language in my pieces and a concept. I have a restricted target audience, but I look for audiences that don't have much supply in the market.	Crucial that the brand has its own identity.
D		Have a language in the pieces and concept for a restricted target audience.
D	I think it is good to have a distinctive, different product with a design that is identifiable to people, that is, people looking at the pieces and identifying a certain brand. People look for the brand because they identify with it.	Have a distinctive, different product with a design that is identifiable.
D		People look for the brand because identity with her.
D	What motivates the purchase is the identification with the brand's concepts and preoccupations. I have a great concern in terms of respect for the environment and environmental conditions, all the choices I make are in order to support the national market. Everything I do is handmade, all materials are recycled, and all materials used are in accordance with EU rules. People realize that there is a concern and there is a certain public that takes this into consideration when buying jewellery.	What motivates us, is the identification with the brand concepts and preoccupations.
D	My audience is connected to the world of art and design. It's not a very young public for two reasons: they still don't value this kind of product, they like to change all the time and often prefer quantity over quality. The other reason is the economic issue. My public starts at 35 and goes up to 70. The public is very connected to arts, design and architecture and doesn't identify with decorative jewellery.	The audience connected to the world of art, design and architecture.
D		Doesn't identify with decorative jewellery.
D		Public between 35 to 70 because younger people don't value these products and because of the economic issue.
D	I participated once in PortoJoia, but I didn't think it was a plus for my brand, so I didn't repeat it.	Portojoia wasn't a plus.
D	The events are essential to make the brands known. I participated in some initiatives promoted by AORP. For example, my brand was selected for a partnership with the MAAT museum.	Events are important to make the brands know.
D		Partnership in Maat Museum.
D	Social media today work very well for all kinds of brands. We have a tool at our disposal today, and we must take advantage of it because they work very well.	Social media works very well.

D	Nowadays, online magazines are good for promoting the author. For example, I was cited in Time Out and had a good impact. More prestigious magazines such as vogue are excellent online magazines that are good to promote the author, for example I cited in Time Out and had a good impact. More prestigious magazines such as Vogue are excellent.	Online magazines to promote the author.
D	I never thought of using influencers, and I've been contacted by many and never went along with it. I am very resistant because I recognize that it is a way to advertise, but I like people to seek the brand because they identify with it and not because other people influence them. I also have not yet found one that I think is the face of my brand, that has a lifestyle that identifies with my brand.	Contacted by influencers but never use although is a way to advertise.
D		Want people to choose the brand because they identify with it and not because they were influenced.
D		Not found the one that is the face of the brand.
D	I create pieces that are comfortable and are to be worn. If possible, to pass from generation to generation. My jewellery is a contemporary jewellery with certain concepts that are transversal to design and some arts but it is a jewellery to be used. I look for a balance between functionality and innovation.	Pieces that are comfortable and are to be worn.
D		Balance between functionality and innovation.
D	Having the pieces in museum stores is great because the public visit these places and it is a very heterogeneous and not only national, so the museums work very well	Present the pieces in museum stores to reach the national and international public.
D	Currently, I am creating a website for online sales, which will be my bet, Also, I have my atelier that works as a store and I had exhibited my works in Casa Da Arquitectura.	Creating online store.
D		Atelier that works as a store.
D		Casa da Arquitectura.
D	They are simple pieces, but with personality and plenty of quality. It is a piece to last, not "fast jewellery". I am very concerned about comfort and versatility. What I like most is when the pieces are part of the person themselves, blend in with their identity	Pieces with personality and quality.
D		Concern about the comfort and versatility of the piece
D	My creations are simple pieces with personality and quality. It's a piece to last, not fast jewellery. I am very concerned with comfort and versatility.	The piece makes part of the person blend with their identity.
AS	Author Jewellery is increasingly valued in relation to classic jewellery, stores are becoming	Author Jewellery is increasing and stores are

	more interested in selling author jewellery. The big difficulty is that many times we are independent workers or small companies.	becoming more interested in selling author jewellery.
AS		Independent works or small companies.
AS	Aesthetics are fundamental for public acceptance	Aesthetic is fundamental.
AS	The target audience of author jewellery varies a lot, my audience differs from the target audience of my colleagues because in author jewellery the design and identity are what dictate the target audience. Upper-middle-class women	The target audience is dictated by the design and the identity of the brand.
AS		Upper-middle-class women.
AS	Social media helps a lot in terms of communication strategies, Instagram, websites, etc. I have invested more in this betting on social media, through them I try to influence the sale showing the collections	Invested in social media in order to influence the sale and present the collections.
AS	Partnering with influencers is quite trendy. I usually work with a family that is the All-Aboard Family but nothing too fixed	Partnering with influencers.
AS	Magazines as Vogue, help to reach the consumer. Bet in magazines directed to consumer	Magazines directed to consumer.
AS	I have not yet been to a museum store but I am considering doing so, because I perceive that my target frequents these places	Museums are a consideration since the target frequent those places.
AS	Currently, I am selling online, through retail stores and in two galleries, Galeria 5050 and Espaço Exhibicionista	Online sales, retail stores and galleries.

1.3 Gioia methodology – interview analysis

1st Order Concepts	2nd Order themes	Dimensions
A Small but growing market Small market, i.e. little demand and therefore little supply Small niche	Dimension of the market	Characterization of the market

<p>Niche market</p> <p>Independent works or small companies</p> <p>One person doing everything</p> <p>The public wants to see the peace alive, but there are not many places because the production is reduced, and you can not be at many points of sale</p>		
<p>Consumers prefer the traditional, what is more, familiar</p> <p>Market more used to traditional point sales, goldsmith shops</p> <p>Public not aware of this kind of product, not familiarised with author jewellery</p> <p>The public is still not very intruded in the concept; it will take time to adapt to us because they go directly to known brands.</p> <p>The jewellery trade is very traditional</p> <p>Compares author jewellery with a brand of industrial jewellery that allows reducing the price, and does not understand the difference in the price</p>	<p>Awareness of Author Jewellery market</p>	
<p>Does not favour the education of our public for the arts, for quality design and for bolder forms and concepts</p>		
<p>Live almost exclusively from sales to tourism, even the brand and the shops that represent the work of the brand</p> <p>Live almost exclusively from sales to tourism, even the brand and the shops that represent the work of the brand</p> <p>In other countries, the public has a different sensibility and purchase opportunity</p>	<p>International market</p>	
<p>The author's jewellery trade has difficulty entering the common jewellery circuit, so it has to look for alternative commercial circuits</p> <p>There aren't many ideal point sales for their audience</p> <p>Authors of author's jewellery who found it difficult to enter the trade decided to open what be a collective of authors to have a point of sale of their brand</p> <p>A barrier in the intermediary</p> <p>Author Jewellery is increasing, and stores are becoming more interested in selling author jewellery</p>	<p>Resistance to chance</p>	<p>Distribution channels</p>
<p>Own space is essential</p> <p>Have own shop is ideal</p>	<p>Creation of alternatives</p>	

<p>Have the brand, but they have Tincal Lab, which works as a workshop and shop</p> <p>Started to create their own shops, and some author's jewellery galleries appeared, which gave more opportunities for people to know the product</p> <p>With Collectiva they go directly to the final consumer</p> <p>Atelier that works as a store</p> <p>Act quickly to create the sales opportunity</p>	
<p>Present in many shops as possible, always suited to the style of the brand</p> <p>Present in many stores as possible but always in coherence with the identity of the brand</p>	Congruence
<p>Any art gallery, museum or event helps to create notoriety since well organised</p>	
<p>Presence in jewellery shops and silversmith's shops</p> <p>The presence in jewellery shops is fundamental</p>	Jewellery shops
<p>Present the work in museums and galleries helps create notoriety</p> <p>Fundação Serralves, Museu Maat</p> <p>Galleries and museums are a market route but don't do because they need to leave the piece in consignment and believe there is not the necessary professionalism to sell the piece</p> <p>Galleries are more open to author jewellery than traditional shops</p> <p>The museums and galleries are also a good option to promote brands</p> <p>Developed a piece for MAAT, a museum that receives many visits, and it was a museum that the author identifies with and that is related to arts and technology; much of the jewellery that the jewellery creates combines the two</p> <p>Partnership in Maat Museum</p> <p>Present the peace in museum stores to reach the national and international public</p> <p>Casa da Aruítetura</p> <p>Online sales, retail stores and galleries</p>	Partnerships with museums and galleries
<p>Creating online store</p>	Online sales

<p>Online sales are a good way to promote, but it is not yet the core of the lack of experience</p> <p>Online shop, even if the sales are not high, allows to sell to foreigners</p> <p>Online sales to conquer also the foreign market</p> <p>In Portugal, there is a fear of online shopping but already started to happen</p> <p>Online shopping is mandatory, but the return is not significant because of the price and the target audience.</p>		
<p>A brand that makes a difference is innovative and creative is difficult</p> <p>Escape for what already exists, offer something new and attractive to the target audience</p> <p>Wants to buy something different</p> <p>Appreciates different design</p> <p>Appreciate different things and are not governed by fashions</p> <p>People looking for something different</p> <p>Have a distinctive, different product with a design that is identifiable</p>	Being different	
<p>The brand has an identity an artistic coherence, tells a history, is aspirational and has a soul</p> <p>Jewel with an interest concept</p> <p>Not only to show the product but also to convey the brand concept.</p> <p>Identify with the identity, concept and history of the piece and with the idea of being a manual product.</p> <p>Customers want to know the story behind the piece</p> <p>Crucial that the brand has its own identity</p>	Present an identity and concept	Luxury brands promise
<p>Communicate exclusivity, sophistication, desire and luxury</p>		
<p>People come where for exclusivity</p>	Exclusivity	
<p>People who seek exclusivity</p>		
<p>The brand needs to be original, have good quality, after-sales service and good publicity.</p>	Quality	
<p>But because of the originality and comfort of the pieces.</p>		

<p>Personalised attendance, quality and confidence</p> <p>Pieces with personality and quality</p> <p>Concern about the comfort and versatility of the piece</p>		
<p>Unique piece</p> <p>Not mass-produced, they end up being unique</p> <p>Unique pieces that convey a message and are limited</p> <p>Follow the creation process from the beginning to the final piece</p>	Being unique	
<p>Pieces that are comfortable and are to be worn</p> <p>Balance between functionality and innovation</p>	Functionality	
<p>Each brand needs to find its positioning</p> <p>Find the position</p>	Position	
<p>Difficult to know where the market exists and where it is moving. The author jewellery market is very volatile</p> <p>Have a language in pieces and concept for a restricted target audience</p> <p>The target audience is dictated by the design and the identity of the brand</p>	Identify the target	Positioning
<p>A direct relation between the creator and the consumer that makes the consumer loyal</p> <p>Most online sales are from people who have already bought and know the author and gained confidence with the brand.</p>	Relation between the creator, brand and consumer	Loyalty
<p>The customers end up being a bit faithful</p> <p>Value and credibility helps the brand grow and maintain a portfolio of clients that is very loyal</p>	Loyal	
<p>Lack of demand because of the lack of purchasing power</p> <p>Woman with purchasing-power</p> <p>Public between 35 to 70 because younger people doesn't value these products and because of the economic issue</p> <p>Target audience is upper and middle-upper class between 40 to 75 years old</p> <p>Upper middle class women</p>	Purchasing power	Consumer identity

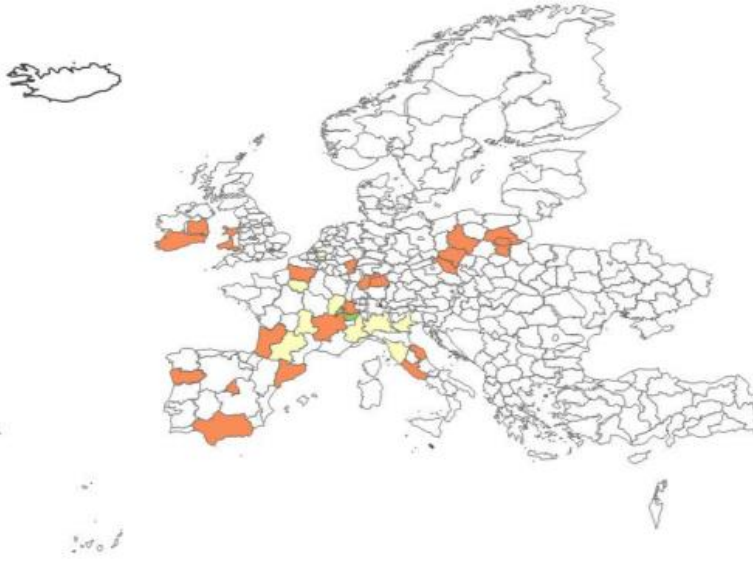
<p>The consumer is motivated by the art, the emotion and the passion created with the Jewell</p>	<p>Emotions</p>
<p>The consumer is motivated by the art, the emotion and the passion created with the Jewell</p> <p>The client identify with the brand, likes and appreciates the work</p> <p>They identify with the reason for that brand, and the author</p> <p>Costumers create an association with the author</p> <p>People look for the brand because identity with her</p> <p>The piece makes part of the person blend with their identity</p> <p>What motivates us is the identification with the brand concepts and preoccupations</p>	<p>Self-identity</p>
<p>People who frequent contemporary jewellery shops, galleries, museums and professions that allow them to be familiar with art and design</p> <p>Museums are a consideration since the target regular those places</p>	<p>Hobbies</p>
<p>Women with audacious taste</p> <p>From people who like design and fashion.</p> <p>People with a more open mind and a more modern spirit are more urban.</p> <p>Buy o to make a difference</p> <p>Doesn't identify with decorative jewellery</p>	<p>Characteristics of the public</p>
<p>People who are either connected to art or who like this concept of art, design, architecture</p> <p>People who are either connected to art or who like this concept of art, design, architecture</p> <p>The market is close to artist areas</p>	<p>Connection to the art world</p>

<p>The audience connected to the world of art, design and architecture</p>		
<p>Regularly expositions presentations and workshops</p> <p>Promote exhibitions</p> <p>Bombarda does an event that involves the art galleries and shops in the area and takes the opportunity to lunch new exhibitions</p>	<p>Exhibitions</p>	<p>Communication strategies</p>
<p>The artist is recognized by his audience</p> <p>Clients represent the brand</p>	<p>Word-of-mouth</p>	
<p>Magazines directed to consumer</p> <p>Use magazines direct for people interest in art</p> <p>Magazines help to give some credibility to the brand and the space</p> <p>Advertising through magazines like Vogue</p>	<p>The magazine choose</p>	
<p>Partnerships with more niche magazines as Faire, Arzuf and the Navel.</p>		
<p>Magazines directed to consumer</p>		
<p>Reports about the author's and the space</p>		
<p>Online magazines to promote the author</p>		

<p>Turns out to be trial and error</p> <p>Advertising makes miracles</p> <p>Social media as a path to communicate the desire and the willingness to live the experience</p> <p>Social media works very well</p> <p>Have a strong digital presence</p> <p>Strong and solid brand language</p> <p>Use social media in order to communicate the concept and the feeling, sells an image</p> <p>Globalisation makes exposure, the access to information about what is done in the world is straightforward</p> <p>Social media have the monopoly</p> <p>Internet is an essential tool because of social networks, and with sites is easier to reach a large number of people and the international public</p>	<p>Power of social media</p>	
<p>Participants in PortoJoia is only fair in Portugal</p> <p>Participation in events helps create notoriety as Moda Lisboa</p> <p>There are some jewellery fairs in Portugal that are not yet tailor-made and not specific to the author's jewellery</p> <p>PortoJoia is a reference fair for jewellery. In the last few years, it has included some author jewellery, but it is still very focused on the industry.</p> <p>Lisbon Fashion, Portugal Fashion already has some collaborations between brands of author jewellery</p> <p>Fashion events and jewellery are two areas that complement each other. It's more about promotion than the return</p> <p>Portojoia wasn't a plus</p> <p>Some people instead of having their own voice follow influencers</p> <p>Events are important to make the brands know</p>	<p>Events</p>	
<p>Have strategic partnerships</p> <p>Partnerships needs to be consistent with the work of the brand</p> <p>Collaborations</p>	<p>Cooperation</p>	

<p>Concentration in the area of Bombarda - people are already beginning to identify this area as a concentration of author's jewellery galleries, if they want this product they will come here</p> <p>Each one in its spaces has different products and different identities and different brands and this ends up being good for us and for the public.</p>	
<p>Influences are a new way of communicating and have a major impact on society</p> <p>Each brand has to find the person who best fits its ideals</p> <p>The target doesn't follow influencers</p> <p>Some people, instead of having their own voice follow influencers</p> <p>Influencers work because visibility level is higher; however, doubt that presents value in terms of sales</p> <p>Prefer that person like the product because they like it and not only because they've seen some influencer use</p> <p>The idea of exclusivity will be loose through the use of influencers</p> <p>There are many but with unstructured work</p> <p>Influencers are more prepared for the mass market</p> <p>Using influencers is contradictory since customers look for exclusivity</p> <p>Contacted by influencers but never use, although is a way to advertise</p> <p>Want people to choose the brand because identity with it and not because they were influenced</p> <p>Not found the one that is the face of the brand</p> <p>Invested in social media in order to influence the sale and present the collections</p> <p>Partnering with influencers</p>	<p>Influencers</p>

Annexe 2 – Clusters in Europe



In **Jewellery and Precious Metals** there are 30 clusters, including one high, 9 medium and 20 basic-performing clusters.

The high-performing cluster is in Switzerland (CH01 Region Lémanique).

The medium-performing clusters are in Belgium (BE21 Antwerp), France (FR10 Ile-De-France, FR43 Franche-Comte, FR62 Midi-Pyrenees, FR72 Auvergne) and Italy (ITC1 Piemonte, ITC4 Lombardia, ITH3 Veneto, ITI1 Toscana).

The basic-performing clusters are in Czechia (1 region), Germany (3 regions), Ireland (1 region), Spain (3 regions), France (3 regions), Italy (2 regions), Austria (1 region), Poland (3 regions), Portugal (1 region), the UK (1 region) and Switzerland (1 region).

Figure 8 Clusters identified

Annexe 3 – Trendvision Forecasting

According to a study realised by Trendvision Forecasting the follow consumers are identified

1. The Intellectual rebel
 - The focus of this consumer is the power of art and subtle retro aesthetics.
 - This consumer is the forefront of a progressive movement from the beginning with new ideas.
 - He believes that making a difference and believes in being different that you want to see in the world and thus spreading a positive influence to the outside of the community

- This change is seen above all in the countries of the world that move towards polycultural transformations and that go towards freedom of expression. It is mainly represented by feminists and people sensitive to environmental changes. The aim is therefore to use art and design as a tool for representing a different way of seeing the World.

2 - The Spiritualist

- The sensual design of the new world is infused by the prodigality of the old world for a chic aesthetic of the underworld that seduces the senses
- The consumer is a person who represents a perfect balance between black and white energy (positive and negative) using an unexplored way of elevation of the spirit, mind and body.
- The theme of well-being emerges in a relationship between spiritualism and mysticism where the dark undercurrent recalls the charm of witchcraft and craftsmanship while the hypnotic shades inspire compelling twists of luxury. And it happens because humans being experts in adapting to survive as in climate change, our body tries to adapt to every need that these changes impose both internally and outwardly with radical inventions.

3 - Dualistic traveler

- The dualistic traveler is therefore looking for new ways of traveling that allow him to give back to local environments and, also to make him feel like they are eating well at the same time. We are globalizing and the borders that were once in place are becoming more and more unlimited. As a result, e-commerce and communications will change. Their motto or purpose is to create a sense of home and belonging everywhere, through various means, including their workspaces and the social circles in which they fit in.

4 - The Phygital

- The Phygital is a virtual and futuristic vision of the World that involves always finding advances. This consumer aims to break down boundaries through art, inviting the mind towards a new kind of illumination.
- It's inspired by modern research on mood and its correlation with sensory experiences. We find this in large cities that have become smart cities such as in China or Japan where new communities are emerging that create a connection between immaterial / ideal space and physical space inspired by modern research on mood and its correlation with sensory experience as AR.

5 - The Disruptive

- In the contemporary world we find dissonant messages about masculinity, it has entailed the urgent need to create a new concept of masculinity based on collaboration and intimacy rather than disconnection and abuse. We can consider this a feminism and masculinism together: male and female collaborate as equals and opposites in an endless mutual exchange, one that empowers the other. this is the generative and nourishing power of life itself. For this new vision of society, we find a profound transformation that passes through the search not only for identity, gender and style but also the rediscovery of lightness and frivolity to face important issues with irony.

Annexe 4 – Italian Interviews

4.1. – Clizia Donato

- 1) How is the jewellery-craftsmanship market characterized? Opportunities and - difficulties.

-The opportunities are many, because for the possibility to express ourselves and to stand out.

- The difficulties are linked to the historical moment, to the level of general culture and economy.

- 2) What has contributed to the development and growth of your brand?

-Constancy, uniqueness and value consistently expressed in the jewellery lines and in my life as a jewellery designer.

- 3)What mainly characterizes the consumer of your products?

-The joy of wearing a unique jewel in the world in limited series and with a strong emotional value that can accompany it in daily life as well as in the most important ceremonies.

- 4)What motivates your customers to buy your products (messages, quality, uniqueness...)?

-The story they contain, the light they give off, the comfort and the way they make the wearer feel.

- 5)Types of events you participate in to increase visibility?

-Trade fairs, pop up stores and artistic events, product placement in films and music videos.

- 6)More communication techniques you use to communicate messages and get more customers and get more notoriety within your country?

-Strong and refined images side by side with suggestive captions. Especially on Instagram @cliziaornato

7) What form the following communication methods should be used as an advantage in communication.

- Social and digital marketing

- Magazines, advertising, television more...

- Influencers or testimonials can be a good option to create notoriety and what characteristics should these people have?

Good communication is active on all fronts, each brand can find its ideal medium without excluding the others.

8) Distribution channel more profitable for your brand? In-store sales, online sales, fairs, other...

-Fairs and online sales

9) Some words about competition in the market?

-I look at the quality of materials and techniques rigorously Made in Italy that I use to propose the best possible offer. My focus remains the competition with my own brand to continue to evolve at its best.

10) Do you feel helped and how by the Italian State?

-Not too much

11) Is there a mutual aid between the members of a possible association of which your company is part? If it is of what form?

-There are several associations of goldsmiths also online that offer many opportunities for exchange and comparison.

4.2 – Carlotta Scarabeo

1) How is the market of the jewellery-craftsmanship market characterised?
Opportunities and difficulties

As in all markets, the greatest difficulty is the "competition", i.e. the very large number of craftsmen on the market and the very large number of proposals. Today the greatest opportunity for me is the web, which provides a showcase for the whole world. The web, however, is a double-edged blade as it allows to have an immense visibility but it is still a place saturated with proposals.

2) What has contributed to the development and growth of your brand?

Certainly, the development of a coherent concept and a brand-identity that would make the product recognizable.

3) What mainly characterizes the consumer of your products?

Surely who you choose and my product is, first of all, a fan of "handmade", a lover of jewells

My brand is certainly recognizable also because all the lines are mainly made with nautical tops, there is a slice of customers who fall in love first with the material and then with the product.

4) What motivates your customers to buy your products (messages, quality, uniqueness...)?

The uniqueness of the handmade product, the possibility to personalise the product with an infinite series of possibilities, the possibility to interface directly with the person who creates the jewel making the comparison much less impersonal.

5) Types of events you attend to increase visibility?

Trade fairs, the organisation of which unfortunately doesn't help small brands at all.

Festivals or dedicated meetings (In Milan, for example, Design week, Fashion week, Jewellery week).

6) More communication techniques to use to communicate messages and get more customers and get more notoriety within your country?

Regardless of the technique, communication must be COHERENT.

Unfortunately, in the case of small brands, as mine, you don't always have the possibility to turn to professional skills to create good communication campaigns.

But certainly all communication channels must speak the same language.

Anyone who looks at the website or the social channel or a printed catalogue must understand in less than a second that it is the same brand.

7) The following communication methods should be used as an advantage in communication.

From 1 to 10

- Social and digital marketing 10

- Magazines, advertising, television more... 5

- Influencers or testimonials can be a good option to create notoriety and what characteristics should these people have?

Yes, if done with continuity. No, if done occasionally or without a marketing plan. The characteristics must meet the buyer's target.

8) More profitable distribution channel for your brand? In-store sales, online sales, fairs, more...

Surely the most effective distribution channel for me remains the sale on shops. The handmade product must be touched, looked at, measured, especially if it is a bijoux, it is important to understand the fit, the size, the weight.

Today the most profitable points of sale for my brand are the high-end clothing shops.

My creations can be defined as "jewellery" but also "accessories", which is why they can be placed in the fashion world rather than "precious". Surely the most profitable way to find the right target group are, unfortunately, the trade fairs.

9) A few words about competition in the market?

Infinite

10) Do you feel helped and like the Italian state?

Very little.

11) Is there mutual help between the members of an association to which your company belongs?

There is certainly a collaboration between the craftsmen because you are all "in the same boat". It is rare that without competition we can join forces to make collaborations or joint projects, but fortunately it happens sometimes.