



WWJMRD 2021; 7(9): 31-37
www.wwjmr.com
International Journal
Peer Reviewed Journal
Refereed Journal
Indexed Journal
Impact Factor SJIF 2017:
5.182 2018: 5.51, (ISI) 2020-
2021: 1.361
E-ISSN: 2454-6615
DOI: 10.17605/OSF.IO/48DVC

Sandra Stephan
Symbiosis International
University, Pune,
Maharashtra, India.

Tanya Chugh
Symbiosis International
University Pune, Maharashtra,
India.

Correspondence:
Tanya Chugh
Symbiosis International
University Pune, Maharashtra,
India.

Consumer Sentiments on Sustainability of the Fashion Industry: A Survey

Sandra Stephan, Tanya Chugh

Abstract

The fashion industry is a multi-billion-dollar enterprise dedicated to manufacturing, designing and selling clothes. It is a globalized sector that works to satisfy the demand for clothing and determines patterns about what needs to be worn. A heightened realization of the environmental impact of the fashion industry has emerged in recent years, fueled by the surging evidence of increased clothing consumption driven by growing accessibility and affordability of clothing. This change has simultaneously cultivated not just a culture of unnecessary and imprudent consumption of clothing but also an unwary and quicker disposal of it. Over the years, a great deal of evidence has been gathered to show the disastrous impact the industry has made. From small fair trade companies to major fashion industry leaders, there are many new approaches being introduced and help being provided for sustainable fashion. The perception of customers towards sustainable fashion is an essential aspect of resolving the defined problems, which creates the conditions not only for improving consumers' awareness of sustainable fashion also for organizations in the fashion sector to take social responsibility for their activities. This research aims to evaluate the implications of the current buying behavior of customers and their perception towards sustainable fashion.

Keywords: Fast fashion, Sustainability, Research, Customer Sentiments, Slow Fashion

Introduction

The fashion industry is a well-oiled machinery dedicated to manufacturing, designing and selling clothes. It is a globalized sector that works to satisfy the demand for clothing and determines patterns about what needs to be worn. Fast fashion in layman's language can be referred to those designs that get translated from the high-end version into cheap but trendy wear that is accessible by everyone, and this process happens in a minimal amount of time. The main idea is to get the most popular wear to consumers as soon as possible so that they can lap it up while it's still trendy.

Also, is based on the idea that one has to always stay on top of the trend to stay relevant and that repetition of clothes is a faux pas. This has turned shopping which was an occasional occurrence into a hobby i.e. is an activity that is often part of everyday life. The main reason for this is that clothes became cheaper and quicker in terms of their production cycle. This change has simultaneously cultivated not just a culture of unnecessary and imprudent consumption of clothing but also an unwary and quicker disposal of it. However, this ideology has led to making the fashion industry one of the largest polluters of the world as it warrants on behavior of overconsumption and overproduction, making the industry a toxic space. The dark side of the industry has a diverse and perilous impact on all its stakeholders, especially the environment. From small fair-trade companies to major fashion industry leaders, there are many new approaches being introduced and help being provided for the fashion industry to move forward in a sustainable manner.

Melissa Nataadiningrat, a professional in the industry, states that sustainable fashion isn't just using bamboo-based fibres and slapping the term 'sustainable' on the hang tag. It can only be considered sustainable when the entire supply chain of that bamboo is sustainable. Taking into consideration the intensity of environmental problems, such as global After documenting the latest trends and new developments and understanding the role of sustainability in the fashion industry, this paper presents the findings of an anonymous

survey conducted among Indians aged 17-27. The results were reviewed with the purpose of understanding the different perceptions of sustainability in the fashion industry, concentrating predominantly on Generation Z.

Review of Literature

The fashion industry has been prevalent for centuries, encouraging individuality and giving people a chance to express themselves and to tell stories about their cultures. Although, the industry, especially fast fashion results, in multiple issues concerning the environment, society and the economy. It has been accused of taking insufficient responsibility for its actions towards resolving environmental problems and the issues of over-consumption of natural resources due to its production and marketing strategies. Over the years, a great deal of evidence has been gathered to show the disastrous impact the industry has made. In the fashion community, there have been discussions regarding the adoption of new materials and economic models to minimise the impact of fashion production, operations, usage and disposal (Brooks, Fletcher, Francis, Rigby, & Roberts, 2017). Although, people across the industry defines and acts on "sustainability" differently. Based on interviews and research conducted in London, Portland and San Francisco, Kedron Thomas, in 'Cultures of Sustainability in the Fashion Industry', identified exceptional variability among personnel and sheds light on how different brands and roles, such as fashion designers and business managers, operationalise sustainable practices. Despite the remarkable variability, the main source of the problem in attaining sustainability is consumers (Farrer, 2011). Consumers want to own large quantity of clothing at the cheapest price. Due to this, fast fashion allows users to indulge in clothing with easy accessibility and affordability (Athwal, Carrigan, & Henninger, 2019). Consumers' desire to remain "in fashion" needs a constant supply of new styles, and once new fashion comes into the mainstream, it gets out of date, losing its allure and inspiring trendsetters to look for the next new fashion (Brewer, 2019). It tends to be one of the industries most impacted by environmental issues because it needs to satisfy the increasing demand for fashion products, utilizing large quantities of natural resources (such as water, electricity, cotton, textiles) and chemicals, synthetic materials, pesticides, which are very harmful to the environment (Arrigo, 2020). In order to create sustainable supply chains, fashion companies need to achieve a balance between social, environmental and economic goals in order to meet the needs of stakeholders. Contrast to the traditional understanding of the shareholder value theory, which seeks to optimize shareholder capital without regard to other stakeholders, the idea of corporate social responsibility enables companies to follow environmental policies and to take actions with due consideration for the environment and the society, taking into account a much broader variety of

stakeholders (Arrigo, 2020).

Recently, consumers are becoming more aware of the immediate need to address sustainability issues. Studies show that most are ready to buy eco-fashion as long as they are stylish but more than half of the market lack the means to invest in it. Aesthetics trumps ethics, at least for the time being. (Joy, Chan, Jr, Venkatesh, & Wang, 2015). The notion of buying exclusive, original products from a luxury brand is both an aspirational vision and a desire; but pragmatism prevails even as expectations inspire them to follow their dreams (Rafi-Ul-Shan, 2018). The fashion industry's recent wave of deliberate action toward sustainability is in part inspired by many comprehensive industry sustainability reports published in the last 3 years, but moreover it is a collective response to the recent fashion industry-specific sustainability initiatives such as the "2020 Commitment", which have rallied formal commitments from a significant portion of the fashion industry toward concrete, quantifiable action for sustainability by 2020 (Wu & Li, 2019). The revolutionary challenge of finding a better way of organizing appears more important than ever in the light of global environmental change, and yet the solution lies not only in technological innovation but also in transforming culture, economies, and politics and creating new creative ideas and propositions for living differently.

The fashion industry has recently heeded the call for sustainability and ethically sound production. There has been, however, a reluctant uptake of these products with many consumers and a seeming conflict with existing 'fast fashion' desires in this area. (Lisa McNeill, May 2015) To effect real change in the global fashion industry, the countries where brands are headquartered need to reconsider their legal policies. The existing liability rules need to be amended to incentivise the brands' direct involvement in labour issues in their chains. (Sobel, 2017)

Research Gaps

The Ethical dilemma of the buyer

The buyers are aware and informed of the shortcomings of the fast fashion industry and the dark side of it but without a better and cost as well as quality effective clothing alternative that the people of nowadays are used to, it would be difficult to get buyers to swear off fast fashion trendy and cheap clothes. So, a research gap of how local businesses can stay on top of the game by staying relevant is necessary.

Making organizations accountable and responsible

By keeping the consumers in the loop, and by taking ecological and ethical practices that hold them accountable for the woes and shortcomings of the supply chain and the model of the fast fashion industry.

The lack of creativity that the industry warrants

The fast fashion ideology warrants a lack of creativity in the clothes and fashion by both the users as well as the consumers, also gives of the idea that copying the design of some other designer is acceptable, this disregards the value of the art of the designer and the efforts that they have put into it.

The effect of COVID-19 on the fast fashion industry
Since, the global pandemic has put all the economies at a standstill, fashion industry is one of the worst hits as it's not an essential activity, however the shift in the consumers preferring e-commerce platforms over visiting retail stores for safety is undeniable. So a gap on how the fast fashion industry will morph itself to survive these unprecedented times exists.

The future of the fast fashion industry

The warrant of a fashion revolution and how to go about it, is missing, all research available emphasizes the dark side of the fashion industry but little offer a clear plan on how to go on further with dealing with this while also not giving up on the spirit of fashion

Research Objective

This review of literature has attempted to provide a current and comprehensive perspective on the most troubling environmental impacts of the fashion industry today, the leading global sustainability strategies developed to help drive the fashion industry toward meaningful action. Studies show that 'sustainability' is a growing trend in every industry and not just fashion. This study is aimed to determine and analyse the variables that influence customer's perception towards sustainable fashion, their willingness to invest in it and understand how their buying behaviour impacts the environment.

Research Hypothesis

The hypothesis refers to a specific statement that the research intends to answer from the research, for this research focuses on the customer's behaviour regarding sustainable fashion, the derived research problem is 'In spite of sustainability being a trend attracting young consumers, do conscious consumers still keep distance and to act in a sustainable manner when shopping fashion?'

Research Methodology

Type of research

'Exploratory research' is done in order to investigate problems identified which were not clearly defined in the past, as sustainable fashion from the customer perspective is not clearly studied. Thus, type of research doesn't usually lead to a conclusive result.

Both qualitative and quantitative data was used for research purpose:

1. Qualitative data

Research required data from various articles, research papers to understand buying behaviour, pricing concerns and willingness to buy and invest in sustainable fashion.

2. Quantitative data

Data was collected in the form of a questionnaire/survey and analysis to state and draw a numeric and statistical relationship between the factors of customer sentiment towards sustainable fashion.

Type of research design

This paper makes use of Descriptive Research Design as well as Experimental Survey Research. The key goal is to collect large amounts of survey data to describe the behaviors, thoughts, and attitudes of a representative sample of individuals towards the fashion industry and determines what supports sustainability in the industry.

Population of the research

The sample taken into consideration for participating in this study consists of respondents between 17-27 years of age wherein the samples are selected on the basis of convenience. The geographic boundaries of the study cover only customers and available brands in South Asia.

Sampling considerations

A simple random cross-sectional* flexible** sample was collected,

1. An infinite population was considered
2. The sample size, however, was 145
3. There are though no specific gender specifications
4. The age group of 18-25 was taken into consideration, for the reflection of the trend in the future generations

*cross-sectional refers to a type of research that is taken at a particular point of time

** flexible sampling refers to a sample or research data which isn't subject to rigid standards

Variables

The variables can be classified as:

Independent variable

This is the variable that has a direct effect on the dependent variable. For the purpose of the study the independent variables are consumer sentiments such as

- buying behaviour of individual customers,
- Social and environmental consciousness of the individual customers,
- Willingness to make a change by the individual customers

Dependent variable

This is the variable that is related completely on the independent variable, for the purpose of the research. The study has the following dependent variables:

- Popularity of sustainable fashion among individual customers,
- Investment made in sustainable fashion

Scales used

A scale is used in research to measure the data collected in the form of measurement is referred to as the scale.

The scales used are:

Nominal scale

This is used for to assign the concepts into categories or boxes, wherein all scales are equal. It is used for identifying the priorities of customers while purchasing clothes and for the measurement of the popularity of fashion brands.

Example: 'Do you consider the environmental/social impact before making a purchase?'

- Yes
- No

Ordinal scale

Ordinal scale is used to understand their views and attitudes towards the fashion industry and in the self-reflective part of the survey.

Example: Is it important for fashion brands to reduce their long-term effects on the planet by addressing global poverty, climate change, environmental security and gender equality?

- Strongly Agree
- Agree
- Neutral
- Disagree
- Strongly disagree

It focused or relied more on the nominal scale over other forms.

Instruments used

The instrument refers to the form of data collection of the research, hence, for purposes of this study, a **survey**, consisting of both close-ended and open-ended questions, was used. Surveys provide a high level of general capability in representing a large population. Due to its ability to extract large amounts of data, the data being gathered possess a better description of the relative characteristics of the general population involved in the

study. The survey was kept anonymous which allowed the respondents to be more candid with their responses. This has been done in the form of a ‘Google Form’ that was circulated among a college going population in general with no specifications for gender.

The following is the link to the said questionnaire.
<https://forms.gle/4qcAttmdcnJeSoD9>

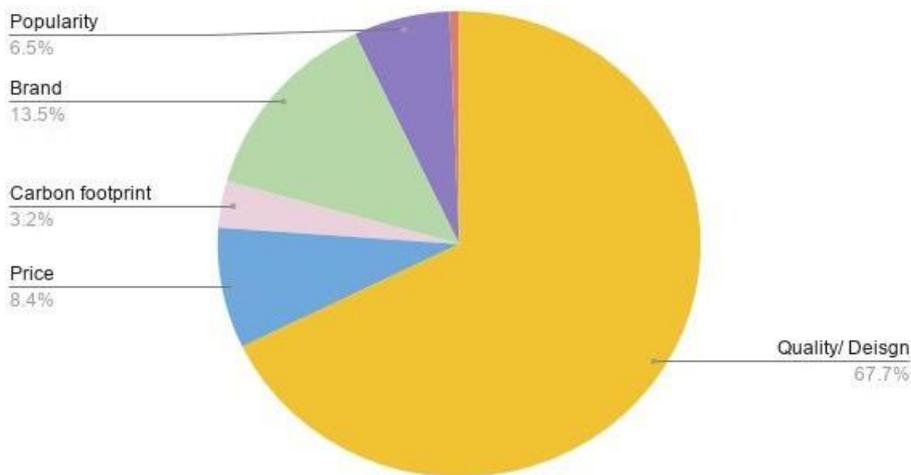
Tools to be used

This refers to the systems relied upon to crunch, analyse and systematically present the data collected throughout, This study leans on a pie chart for analysis

Results and Analysis

A total of 155 responses were evaluated and analyzed for the purpose of this research.

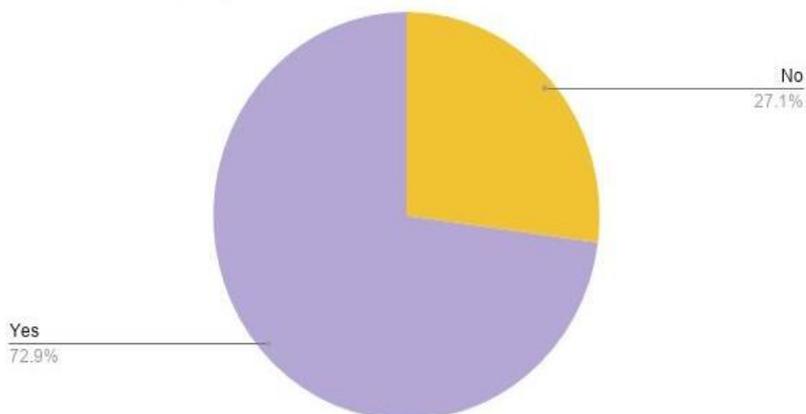
1. What is your priority while purchasing clothes?



The diagram illustrates the priority of the sample population when purchasing fashion apparel, majority i.e. more than 50 per cent (67.7%) focus on the design of the garment, then focuses on brand followed by price,

popularity and lastly carbon footprint. Therefore, this gives us a fair idea about how only a fraction of individuals even consider the impact of their purchase.

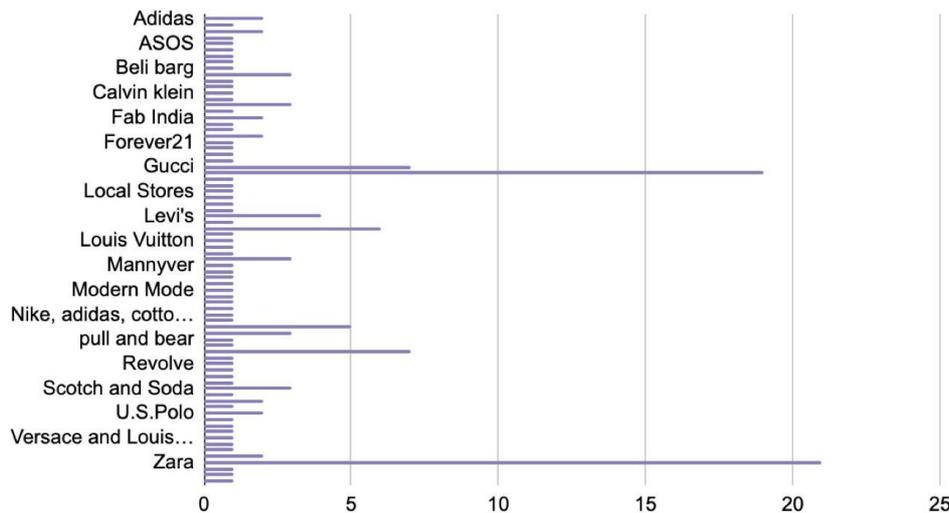
2. Do you consider the environmental/ social impacts before making a purchase?



When asked about their thought process on considering the social/environmental impact when making a purchase, almost a 78 per-cent mentioned that they did evaluate the effects, although this question is open ended and doesn't just refer to fashion apparel. And this is a quite positive

response for sustainable fashion marketers, as they can tap this concern. However, there has to be a gradual shift towards making this thought into actual sale that does make a difference.

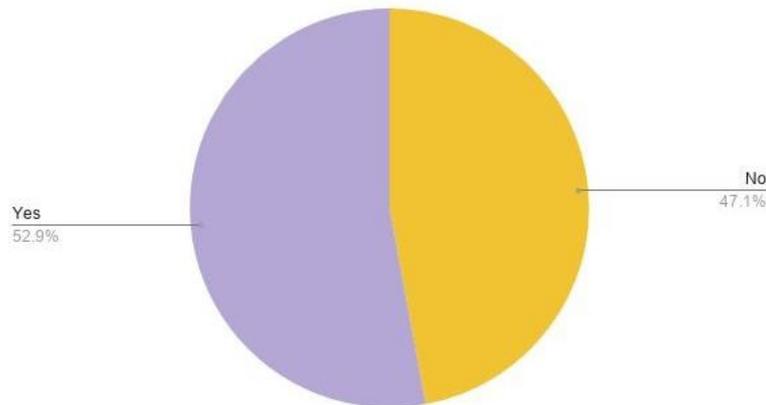
3. What is your favourite brand of clothing?



In an attempt to get an insight on their favorite brand, we got a huge variety of answers, though this gave us an idea as to any upcoming sustainable fashion brand that is

popular among the population. However, in 155 responses and almost a variety of 15 brands, none of them were sustainable fashion brands.

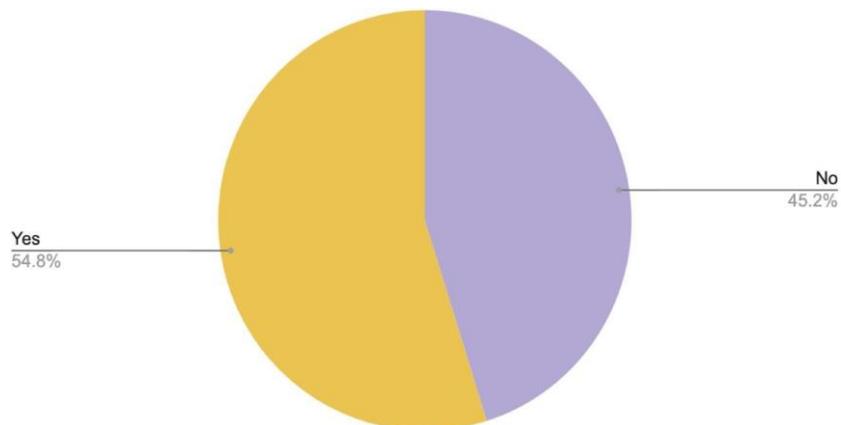
4. Do you own or invest in sustainable fashion?



The data reflects that a fraction more than 50 per-cent, invest in sustainable fashion. Even though it's almost evenly split it's a great sign for sustainable fashion and a

step towards sustainability. Since, the hard part is to convert the thought into actual sale to make a difference in the cycle of fast fashion.

5. Considering other factors to be similar, would you purchase sustainable fashion if it costs more than regular clothes?



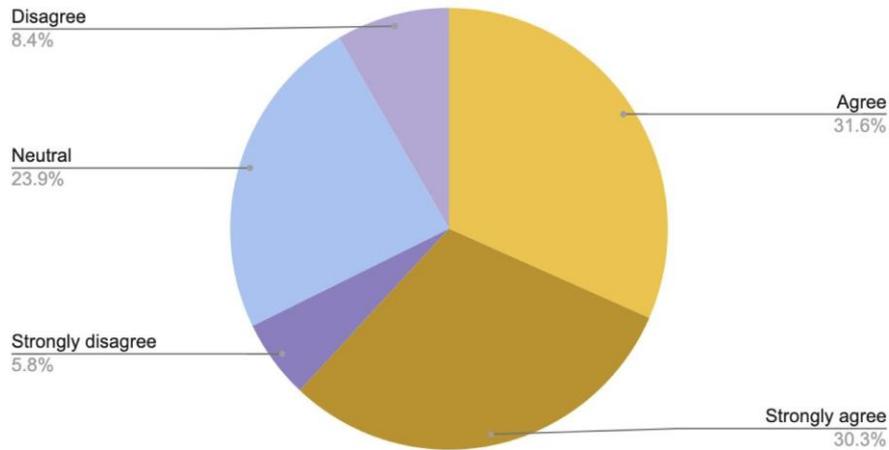
The data shows that 54.8 per cent of the total participants in this survey would purchase or invest in sustainable fashion even if it costs more than regular clothes. Price is often an important factor in purchasing clothes. It is generally

believed that sustainable fashion is significantly more expensive. However, consumers are unaware of its reason. It is easy for brands to produce a lot of items

in a short period of time and sell them at a lower price point. Producing fashion with a sustainable supply

chain means making fewer items and selling at a higher price point.

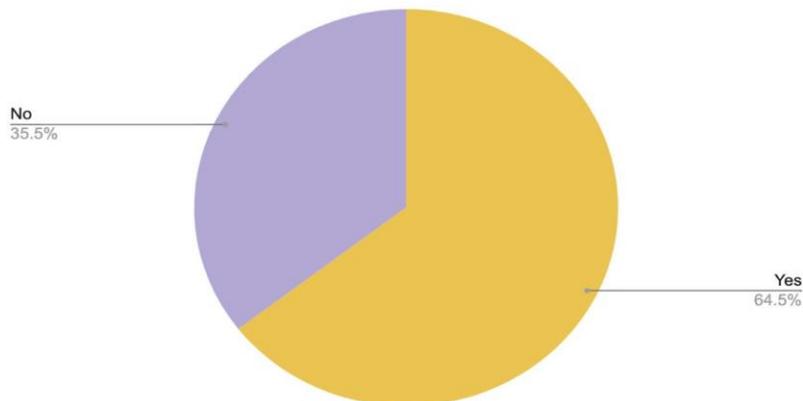
6. Is it important for fashion brands to reduce their long-term effects on the planet by addressing global poverty, climate change, environmental security and gender equality?



When asked about the importance of fashion brands practising sustainability, only 61.9 per cent agreed that it was necessary. Sustainability as a concept is an enormous, complex, yet ever more urgent task that requires drastic and

revolutionary measures. But consumers question whether fashion will ever truly achieve sustainability or just another trend.

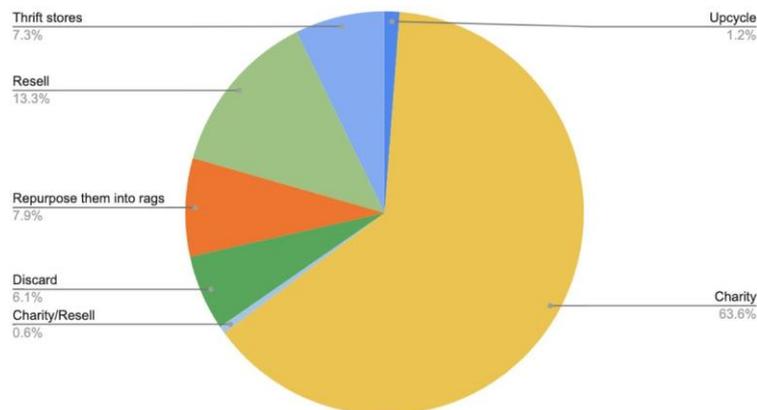
7. Have you ever upcycled your clothes or considered it?



Majority (64.5 per cent) of the participants practice upcycling or have considered it as an alternative to discarding unwanted clothes. The rising trend of upcycling

clothes not only contributes to sustainability but provides a new found connection to the clothing and views it as a way of filling voids instead of adding more waste to the world.

8. How do you dispose of unwanted clothes?



The most commonly used method for the disposal of unwanted clothes was donation via charities while only 6.1

per cent chose the discard method. Reselling, donating and reusing are favoured from an environmental and economic

point of view over discarding since they reduce the likelihood of clothing waste, assist social causes and provide job opportunities.

Conclusion

In conclusion, sustainable fashion still has a long road ahead but the industry is starting to make progress as more brands and consumers adopt environmentally friendly products and shopping habits. From small fair-trade companies to major fashion industry leaders, there are many new approaches being introduced and help being provided for sustainable fashion. As per the studies carried out, an optimistic direction has clearly emerged for the future; the data collected reflect hope for a rise in ethical approaches to business and the adoption of sustainable strategies and practises in the industry. Thus, this paper contains thorough analysis on the model of the fashion industry from the perspective of all its essential stakeholders i.e. the consumers, while questioning the sustainability of the industry and also focusing on the profitability of it. It has an aspect of customer motivation and how retailers use them to attract these consumers, also an emphasis on actual steps taken by customers. Future research could deepen the understanding and provide a more comprehensive view of what motivates sustainability within the industry, the actions taken and the benefits of society and the environment.

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