

SUSTAINABILITY TREND IN THE FASHION INDUSTRY: CONSUMERS' POINT OF VIEW

Abstract

Author(s) Talanova, Sofiiia	Type of publication Bachelor's thesis	Published Autumn 2019
	Number of pages 39, 4 pages of Appendices	
Title of publication Sustainability trend in the fashion industry: consumers' point of view		
Name of Degree Bachelor of Business Administration		
Abstract <p>Because sustainability is a modern mega-trend, it is influencing almost all aspects of people's lives. As the fashion industry is currently the world's second largest producer of carbon emissions, second only after oil, the sustainability trend has a major impact on fashion businesses. The purpose of this study is to evaluate how consumers perceive the sustainability trend in the fashion industry.</p> <p>The study applies a deductive research approach and the following research strategies: a grounded theory, a case study and a survey.</p> <p>The thesis first discusses key topics regarding sustainability, the fashion industry, and consumer behavior. Then the sustainable fashion initiatives of the case companies, H&M Group and Inditex, are described. Based on the outcomes of the literature review and analyzing case studies, survey questions are formulated to find out how consumers view the sustainable fashion trend.</p> <p>The results show that consumers' overall attitude towards the sustainable fashion trend is positive. The steps consumers and fashion brands are taking to become sustainable are described in detail in the concluding section. Furthermore, suggestions for further research are also presented.</p>		
Keywords Sustainability, sustainable fashion, fashion industry, trend, consumer behavior		

CONTENTS

1	INTRODUCTION	1
1.1	Research background.....	1
1.2	Research objectives, questions and limitations.....	1
1.3	Research strategy, data collection and analysis.....	2
1.4	Thesis structure	3
1.5	Research ethics.....	4
2	LITERATURE REVIEW	5
2.1	Sustainability	5
2.2	Sustainability in the fashion industry	6
2.3	Fashion businesses environmental impact.....	9
2.4	Responsible consumption.....	9
2.5	Trends and mega-trends.....	11
2.6	Influences of consumer behavior	12
2.7	Buying decision.....	13
2.8	Literature review outcomes.....	14
3	EMPIRICAL RESEARCH.....	16
3.1	H&M Group.....	16
3.2	Inditex.....	18
3.3	Survey	18
3.3.1	Survey preparation	19
3.3.2	Survey analysis	19
3.4	Empirical research outcomes.....	28
4	CONCLUSION.....	30
4.1	Answers to the research questions	30
4.2	Validity and reliability	32
4.3	Suggestions for further research.....	33
5	SUMMARY	34
	LIST OF REFERENCES.....	35
	APPENDICES.....	40

1 INTRODUCTION

In the modern world of rapid technological development, businesses start to face new challenges that did not exist a couple of decades ago. Today, our society, environment, and economy all face challenges, such as unsustainable consumption and wasteful production of FMCG-products, especially clothes.

The fashion industry is currently the world's second largest producer of carbon emissions, second only after oil (Conca 2015). Moreover, every second an amount equivalent to a truckload of clothes is burned or buried at a landfill (Ellen MacArthur Foundation 2017, 37). The clothing industry causes a great deal of damage to the world's ecosystems. Therefore, the thesis aims to examine how fashion companies are trying to switch to more sustainable ways of doing business, what results this may have, and how consumers see the growing sustainability trend in the fashion industry.

1.1 Research background

According to Saunders, the purpose of a research background is to explain the context and the aim of the study to the reader of the thesis (Saunders et al. 2009, 42).

Since sustainability is a modern mega-trend (TRENDONE GmbH, 2019), which influences almost all aspects of people's daily lives, including businesses and specifically clothes-producing companies, its influence upon the clothing industry has been examined in many studies. The topic has been a matter of discussion for last decade. However, most research of this topic available from digital resources examines the problem not from the consumers' but from the businesses' point of view, describing the outcomes a sustainable fashion trend may bring to the industry in the future. In addition, previous research has primarily concentrated on the production side of eco-friendly clothing, but not on its marketing and consumers' attitude towards it.

The thesis focuses on studying sustainable mass-market fashion and consumers' attitudes toward this trend. Therefore, the study is based on a literature and case studies review, which includes some of the findings of earlier research, and on a consumer questionnaire that measures their attitude towards a sustainable clothing industry. The in-depth description of the methods used in the research is presented in sub-chapter 1.3.

1.2 Research objectives, questions and limitations

The objectives of the thesis are the following: defining the ways which fashion brands use to promote sustainability trend and how the consumers see this trend.

The main research question of the thesis is:

- **How do consumers perceive the sustainability trend in the fashion industry?**

In addition, the following subordinate research questions are presented:

- **What is the sustainable fashion trend?**
- **What actions do fashion businesses take to become sustainable?**
- **How do consumers support the sustainable fashion trend?**

The thesis has some limitations, which help to keep the research consistent. Firstly, because a term “fashion businesses” is a broad concept, the research conducted has been framed, and covers only mass-market fashion businesses. A mass-market fashion company is a retailer that sells clothes at an affordable price for a wide range of consumers (Kenton 2018). Mass-market fashion brands are also easier to be analyzed and to be used for the research survey, as they are inclusive and affordable for almost any type of consumer. In this study, multiple mass-market fashion brands are used as case company examples. The brands examined in this thesis are H&M Group and Inditex.

The second limitation is that this research is framed geographically. The data presented in the research, findings on case studies and survey outcomes are only relevant for European (including Russian) and U.S. markets. The cause of this limitation is the fact that the author of this research is mostly familiar with the European and U.S. fashion market conditions.

The third limitation applies to the survey conducted for this thesis and makes it more specific and future-oriented. The survey respondent age has been framed, and it concentrated on Generation Z consumers (born between mid-1990’s and early-2000’s).

1.3 Research strategy, data collection and analysis

Researchers distinguish two different research approaches – deductive and inductive. An inductive research approach is about exploring the data and building theories on its basis. A deductive approach applies to research where the theories are first built based on a literature review and then tested using data. (Saunders et al. 2016, 74.) As this thesis starts by defining research questions, which are answered by conducting a literature review, analyzing case studies, and presenting the results of a survey, this study applies a deductive research approach.

Based on the so-called Research Onion Model by Saunders et. al (2009, 108), the thesis applies the following strategies: a grounded theory, a case study and a survey. Research strategy is a path the study follows in order to answer the research question (Saunders et al. 2016, 177). For the thesis, first of all, a relevant theoretical base available on the topic are collected and analyzed. Then case studies that are applicable to the research topic are studied and evaluated. And afterwards, based on the outcomes of the literature review and case studies analyses, survey questions are formulated.

Based on the research strategies of the thesis, it applies both qualitative and quantitative methods to collect data. A quantitative method, like a survey, is applied when collecting numerical data, which is easy to summarize, compare and generalize. And a qualitative method, like a literature review and a case study analysis, provides data needed for understanding the processes behind the observed problem. Moreover, qualitative methods can be applied to adjust the quality of survey-based quantitative evaluations by generating evaluation hypothesis, designing survey questions and clarifying quantitative research results.

As the thesis applies both qualitative and quantitative methods, it is based on a mixed methods approach. A mixed methods approach can increase the overall accuracy of a study, improve understanding the researched problem, and level the disadvantages each method has if used on their own. (Saunders et al. 2009, 151-154.)

Both primary and secondary data is collected and analyzed to support the research. The primary source of data, which has been generated specifically for this study, is a survey, presented in Chapter 3. In the literature review and a case study analysis, secondary data gathered from various relevant digital and printed sources is used.

1.4 Thesis structure

The introduction of the thesis presents the purpose and structure of the conducted study. The first chapter consists of eight sub-chapters, including the background of the research, its objectives, supporting questions and limitations, its strategy and data collection methodology, thesis structure and ethics.

The second chapter is the literature review section. It presents the key concepts used the study. Chapter 3 then proceeds to discuss relevant case studies. The outcomes of the literature review and case study analysis are also presented at the end of both chapters and are used for formulating the survey questions.

Chapter 3 also presents the second research method—the survey—and its findings. It is presented in the sub-chapters Survey preparation and Survey analysis. The survey questions are listed in Appendix 1.

Chapter 4 concludes the thesis, presents the results of the study and answers the research questions. Moreover, the chapter discusses the validity and reliability of the thesis, as well as the suggestions for further research. A visual representation of the thesis structure is presented in Figure 1.

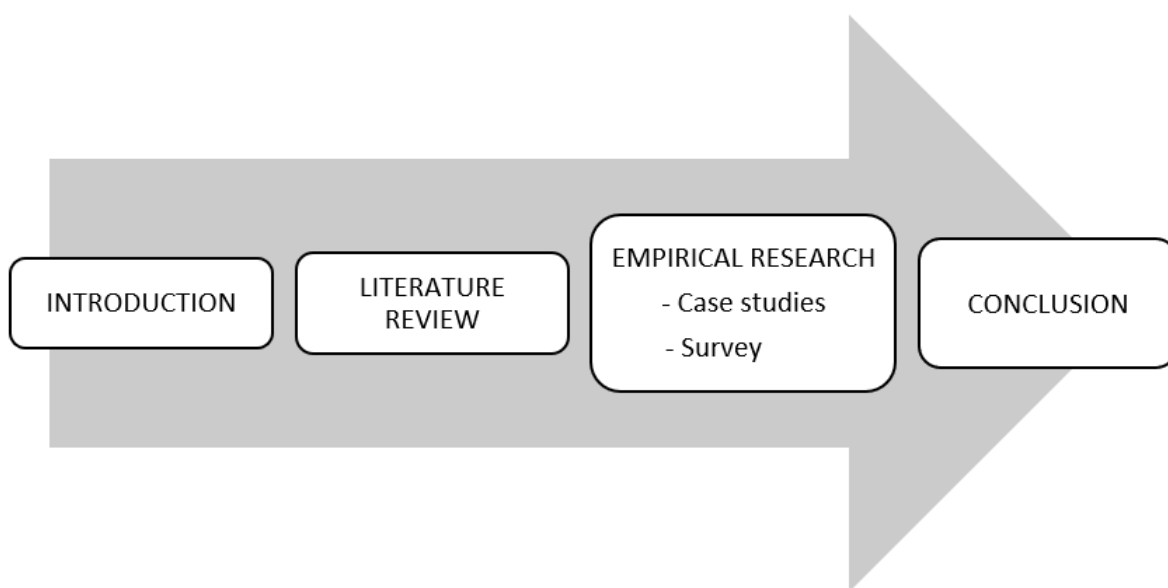


Figure 1 Thesis structure

1.5 Research ethics

The data collected for this research has been properly reviewed and sourced, with all the sources and references marked. All the data presented in literature review part and empirical research part of the thesis is available for public use and none of the data used to support the thesis is confidential.

The survey, the outcomes of which are presented in Chapter 3, was completely voluntary to participate in and answered anonymously. The results of the survey are only used in the concluding part of the thesis. The survey results will not be used for any other purposes other than supporting this study.

2 LITERATURE REVIEW

The literature review chapter discusses theoretical concepts that are used in the thesis. This chapter is based on available research, articles and books. The author defines and describes key terms that are used to formulate research hypotheses and build main research questions.

2.1 Sustainability

Sustainability can be defined as an ability to remain at a certain level or condition (Lexico 2019). People also tend to associate “sustainability” with a concept of sustainable development, firstly introduced in 1987 in the United Nations World Commission on Environment and Development report *Our Common Future*. In this report, sustainable development is explained as a “development that meets the needs of the present without compromising the ability of future generations to meet their own needs”. (United Nations 1987.) Sustainable development is devoted to meet the needs of people, benefit the economy and preserve planet’s natural resources, maintaining a stable ecological state.

During the United Nations World Summit on Sustainable Development in 2002, four main requirements of sustainable development were named. These are social, environmental, economic and technological components. If all the components of sustainable development are well-maintained and balanced, the development is stable. This concept is visually presented in Figure 2.

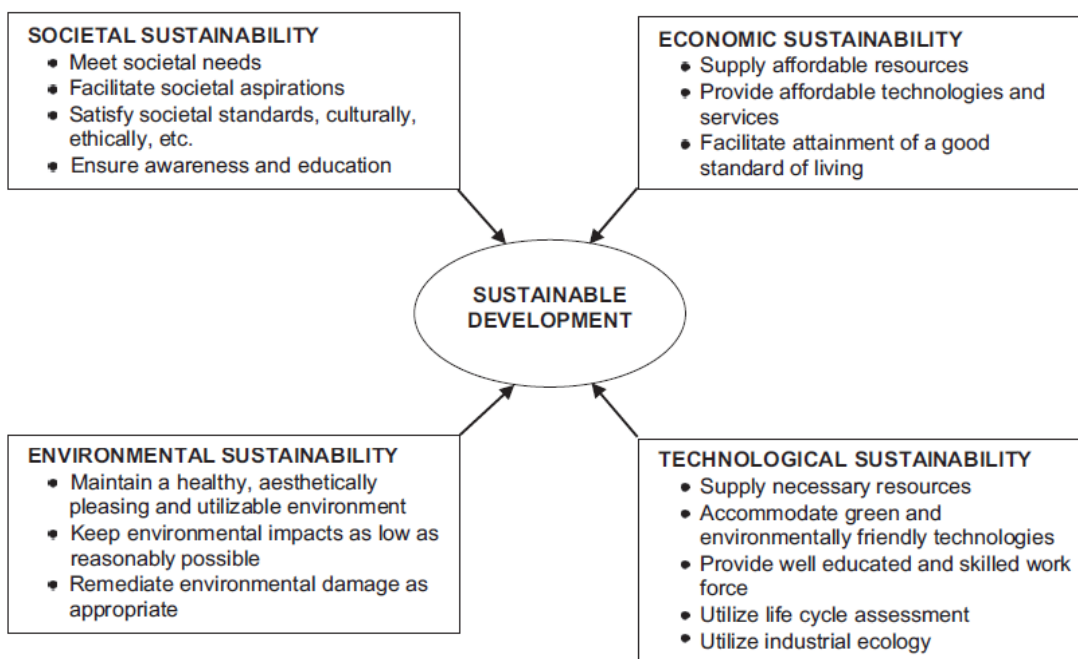


Figure 2 Sustainable development components (Dincer & Rosen 2013, 61)

According to the United Nations (2002), *Energy, Water, Health, Climate Change Adaptation* and *Environmental Sanitation* are the five primary goals of sustainable development. *Energy* means transition to a clean energy economy by ensuring universal access to modern energy services, increasing energy efficiency and extending the share of renewable energy in the global energy mix. *Water* stands for “access to clean water and sanitation” and *Health* is “a protection of community’s health, sanitary measures provision and environmental hazards observation”. The United Nations also stated that *Climate Change* and global warming can harmfully affect people’s lives, posing considerable threats to their living conditions and access to food and water. The last sustainable development goal listed by the United Nations is *Environmental Sanitation*, which means encompassing the control of environmental factors that are connected to disease transmission. (Sanneh 2018, 13-55.)

2.2 Sustainability in the fashion industry

The fashion industry can be defined as a multi-billion global business devoted to producing and selling clothes (Steele & Major 2019). Some authors divide the industry into two branches: high fashion and apparel fashion. The term *high fashion* is devoted to the production of exclusive and expensive clothes, while apparel or mass-market fashion are terms used to describe affordable and mass-produced clothes. However, nowadays the distinction between these two branches of the industry is getting blurred, as, according to a 2018 Interbrand consultancy report, the total sales of the clothes of luxury brands have

increased by more than forty two percent in a year (Interbrand 2018). Currently the majority of high fashion brands are switching from traditional methods of marketing and advertising to a more digital, Millennials-oriented form. Therefore, their sales, revenue and production facilities are increasing, such that the overall amount of clothes produced is now growing faster than ever before.

As shown in Figure 3, the value of the global apparel industry has grown by more than fifty percent over the last eight years, and this trend is likely to remain the same in the near future.

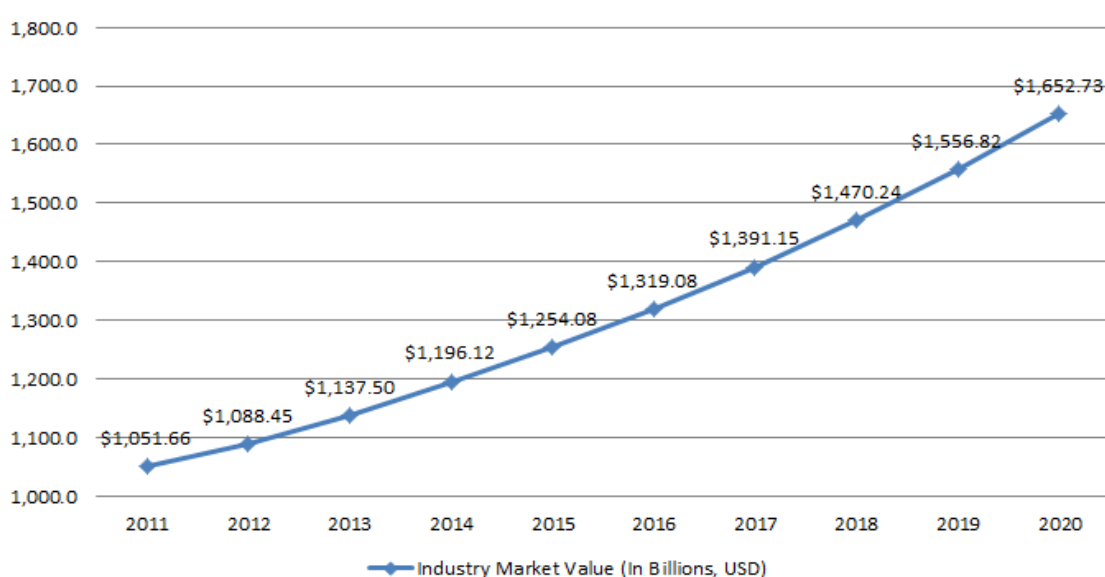


Figure 3 Market size of global apparel industry (Singh 2017)

Figure 4 illustrates how much textile has been recycled, burned and landfilled between 1960 and 2015. The amount of clothes landfilled in 2015 was more than five times higher than the amount of clothes recycled.

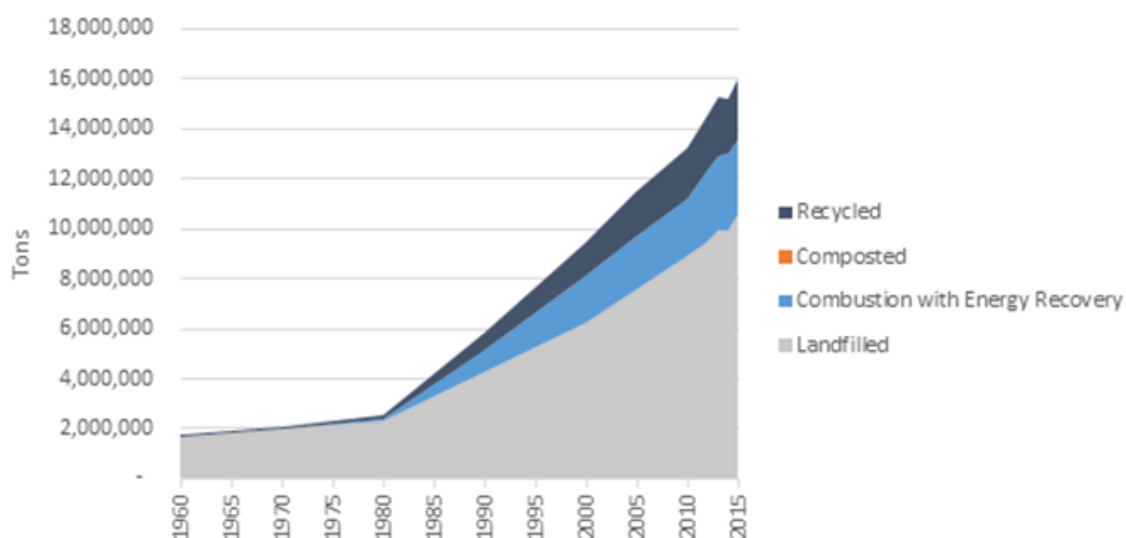


Figure 4 Textile waste management: 1960-2015 (United States Environmental Protection Agency 2015)

Because of the complexity of the recycling process, only one percent of clothes are recycled into new garments, and the rest ends up in landfills (Cooper 2018). Less than fifteen percent of clothing items collected for recycling are recycled into new clothes (Ellen MacArthur Foundation 2017, 89).

For many companies these tendencies are threatening. In 2017, at Copenhagen Fashion Summit, ninety fashion-producing companies (including brands like Inditex, H&M Group and ASOS) agreed to adopt a 2020 Circular Fashion System Commitment. This agreement aimed to turn the industry to a more sustainable and circular way of operating; it consisted of four main action points, which are:

1. To implement cyclable design strategies
2. To increase the amount of resold clothes and footwear
3. To increase the amount of collected clothes and footwear
4. To produce more clothes and footwear from recycled materials

By July 2019, companies that signed the agreement have reached twenty-one percent of the targets, and seventeen additional goals have been added across all the action points. (Global Fashion Agenda 2019.) So far, this Commitment is the biggest initiative taken by the clothes producing companies. A more detailed overview of sustainability-related actions of this research case study companies is presented in Chapter 3.

2.3 Fashion businesses environmental impact

As fashion businesses tend to focus more on sustainability, big brands try to implement more clothes from recycled or eco-friendly materials to their collections. As to the sustainable fabrics, the least damageable for the environment is linen production, as it is fully plant-based. Even though the material itself is natural, it can be cultivated and processed producing huge water waste and disposing soil with chemicals. (Martinko 2017.) The second most sustainable clothing material is cotton, as it is also made from natural materials and currently is the most recycled fiber globally (Smits 2018). However, cotton production requires huge amounts of water and is using major amounts of chemicals, which makes its production process harmful for the environment (Martinko 2017).

Sixty percent of all clothes produced worldwide is based on synthetic fabrics like polyester, nylon and acrylic (Resnick 2019). These fabrics are plastic-based and currently cannot be recycled to create new clothing, as the chemicals cannot be separated in order to produce recycled yarn. Moreover, synthetic fabrics can harm the environment: while being washed in the washing machine, tiny microplastic fibers get into the water and make their way straight to the rivers, lakes and oceans. (Biese 2019.) Microplastic fibers form eighty five percent of all the plastic found near waterlines worldwide (Byrne 2018).

As the materials currently used for clothing production are causing a negative impact on the environment, fashion businesses are investing in new fabrics which will help to reduce water consumption and chemicals use. One of the newly developed materials is Piñatex®, which is a fully vegan and plant-based material made of pineapple leaf fiber that looks like leather (Ananas Anam 2019). It has already been used to produce footwear and outer clothing by brands like Hugo Boss and Puma (Pownall 2019). Another example, a winner of H&M Foundation Global Change Award 2018, is Agroloop BioFibre. It does not produce any waste, as this material is made from the leftovers from the production of flax, pineapple, hemp, sugar cane and bananas. (Pinnock 2019.) However, these sustainable initiatives are supported by a small group of fashion businesses. To develop and implement these requires a lot of time and money, and the cost-effectiveness of such initiatives is uncertain.

2.4 Responsible consumption

As fashion businesses do not prioritize sustainability over profitability, consumers start to take actions towards sustainable fashion themselves. More and more people are now willing to become ethical consumers, following the principles of responsible consumption. Responsible consumption, a part of sustainable fashion trend, means purchasing things

while understanding their environmental impact during all production cycle stages (ADEME 2016, 6). Also, some people start adopting a zero-waste lifestyle – sustainable way of living without producing any indecomposable waste. However, as shown in Laura Gabbert and Justin Schein’s documentary “No Impact Man” (2009), a fully zero-waste lifestyle is almost impossible to follow when living in a city. More than fifty percent of the world’s population lives in urban areas, but it will become difficult to maintain this lifestyle.

Another rising responsible consumption trend is shopping at second-hand stores. A while ago, these stores were considered to be places where only people with below-than-average income would shop. Now the vintage clothing trend is appealing to any person, despite his status. As shown in Figure 5, the resale market is likely to double its market share by 2023.

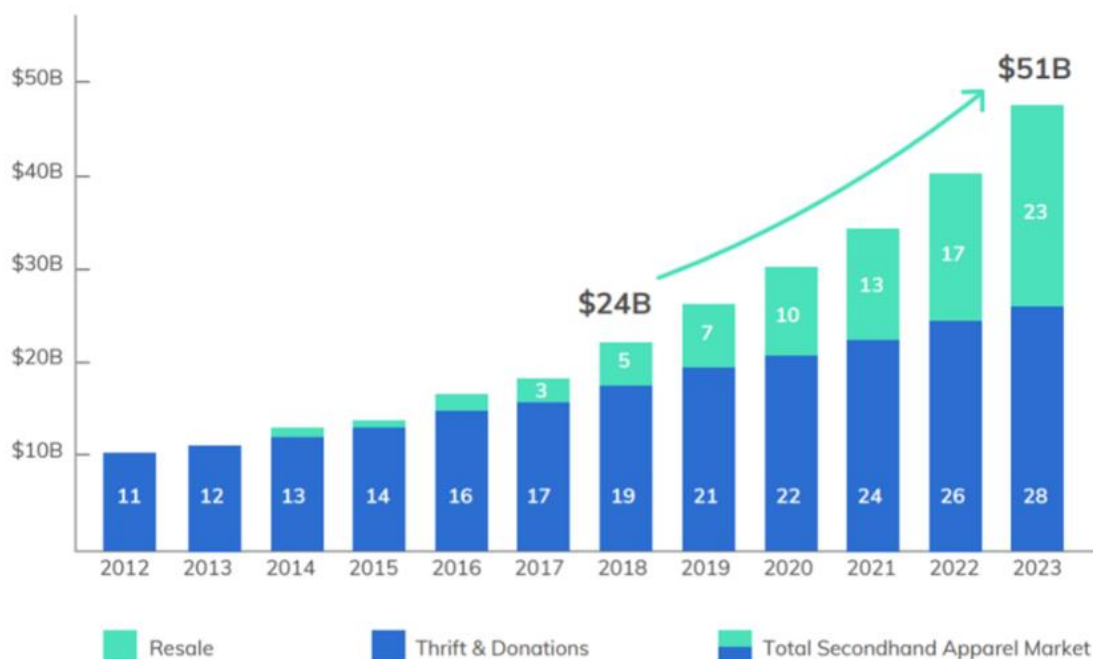


Figure 5 Global resale apparel market revenue: 2012-2023 (ThredUP 2019)

Also, this market has grown twenty-one times faster than retail during the last three years, mostly trending among the Millennials and Generation Z age groups, as seen from Figure 6. (ThredUP 2019.) Recent studies have shown that in 2019 Generation Z amounts to 32% of the world’s population, outnumbering Millennials and other age groups (Miller & Lu 2018).

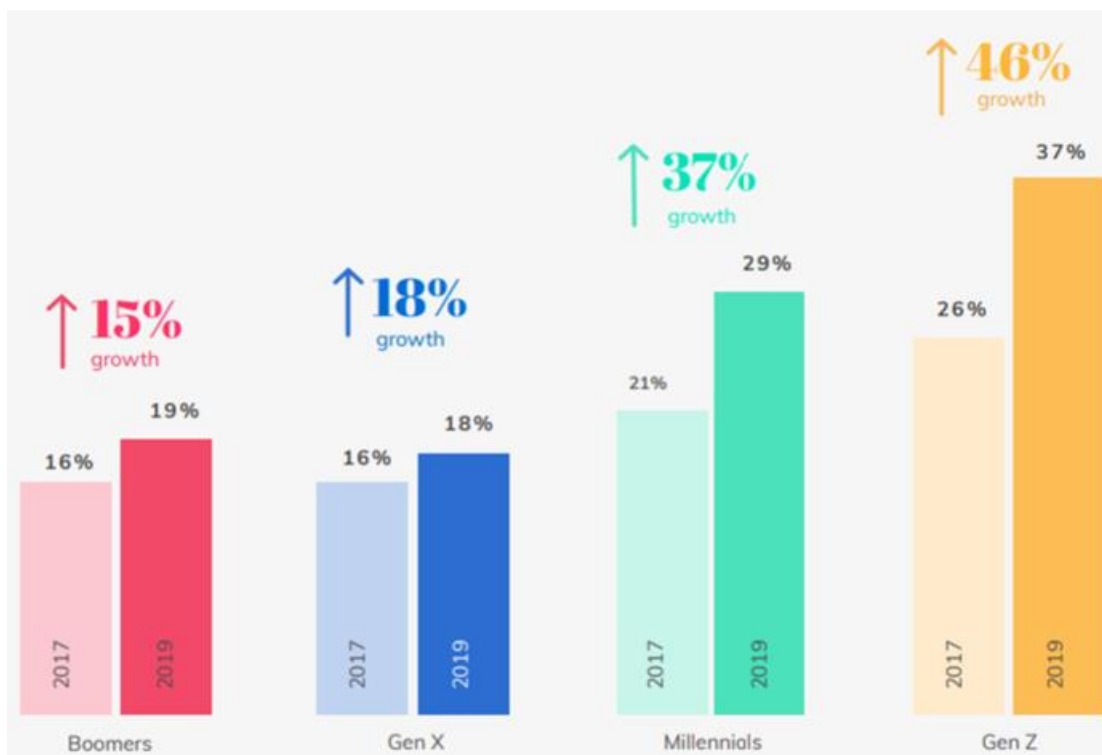


Figure 6 Resale market division per age (ThredUP 2019)

2.5 Trends and mega-trends

As mentioned before, sustainability is a modern mega-trend. This sub-chapter highlights the importance of sustainability in the modern world.

A term 'trend' stands for a general tendency or a pattern for a change over time. Trends influence various parts of people's lives and are hard to be predicted, as it is influenced by a large number of factors and can be changed unexpectedly. Trends shape the future of a particular industry, showing an overall direction of a change for a specific field.

Trends that bring large social, economic, political and technological changes are usually called mega-trends. Mega-trends are global, sustained and macroeconomic forces of development that impact business, economy, society, cultures and personal lives, thereby defining the future world and its increasing pace of change (Singh 2012, 3-4). While trends affect particular industries or groups of people, mega-trends have a global impact on all aspects of people's lives. Because of its' global impact, mega-trends remain actual for a long time, at least for a decade.

According to TRENDONE GmbH (2019), a global trend-forecasting agency, *sustainability* is one of the sixteen mega-trends of the year 2021. A full list of these mega-trends is presented below.

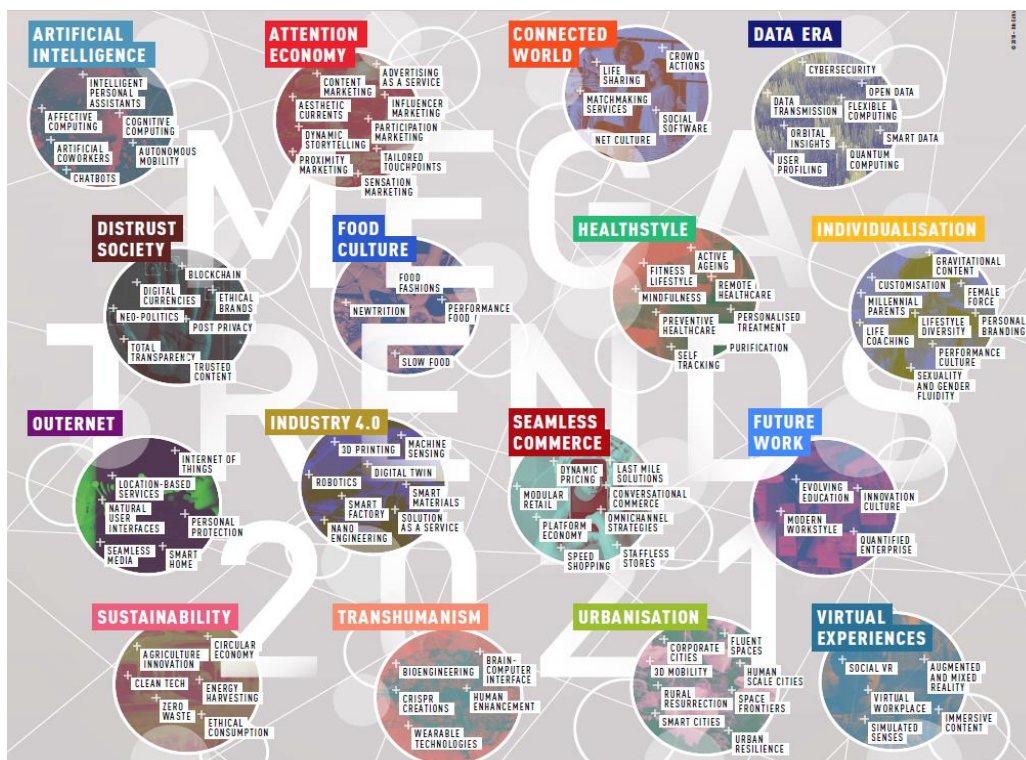


Figure 7 Trend Universe 2021 (TRENDONE GmbH 2019)

As mega-trends listed above formulate people's views and perceptions on the current and future world's state, they definitely impact the way consumers behave during the process of making their buying decision. The concepts of consumers' behavior influencing factors and buying decision are presented in the following sub-chapters and the influence of sustainability trend on it is tested in the consumer survey, the outcomes of which are illustrated in Chapter 3.

2.6 Influences of consumer behavior

According to Solomon, consumer behavior is a study of the processes individuals or groups undergo when choosing, purchasing and disposing the goods or services to satisfy their needs and desires (Solomon 2006, 6).

The patterns and specifications of consumer behavior have been examined in many studies, and the four main factors influencing consumer behavior have been determined: a social, cultural, personal and psychological factor (Khan 2006, 31). Some authors also add an economical factor to this list because usually the decision-making process is affected by consumer's financial status. Figure 8 illustrates the influencing features of every factor in detail.

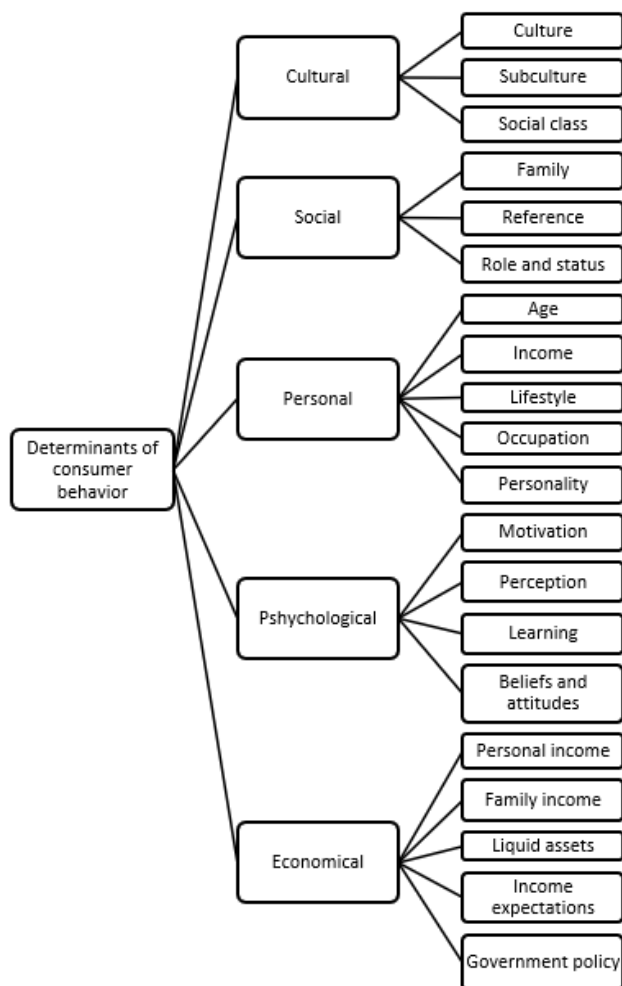


Figure 8 Determinants of consumer behavior (Khan 2006, 34)

Considering the topic of this thesis, fashion brands influence consumers' minds by promoting sustainability. Marketeers understand the importance of sustainability and this mega-trend's influence on consumers' beliefs and attitudes. Sustainable fashion is promoted to form a positive image in consumers' minds, so that consumers start to believe that when they buy clothes made from recycled materials, they do something good. (Muthu 2019, 63.) Subsequently, this factor is influencing consumers' buying decisions.

2.7 Buying decision

The buying or purchase decision is a thought process that consumers undertake before, during and after buying something. The decision process consists of the following five stages:

1. Problem recognition – the buyer identifies a problem or a need in a specific type of product.

2. Information search – the buyer does a research (online, offline or both of them) in order to find a product fulfilling his needs.
3. Evaluation of alternatives – the buyer compares multiple products, analyzing its' benefits and demerits.
4. Product choice – considering the alternatives, the buyer chooses a specific product he wants to purchase.
5. Outcomes or post-purchase evaluation – the buyer evaluate his purchase, considering his satisfaction or dissatisfaction. (Solomon et al. 2006, 258.)

When making a decision to buy new clothing, consumers may consider buying a sustainable alternative during stages 3 and 4. As to the consumers' purchasing decisions when buying sustainable fashion products, a recent survey revealed that almost seventy percent marked sustainability as an important factor when shopping for clothes, and half of the respondents were ready to pay more for a product made from sustainable or recycled materials (CGS 2019).

2.8 Literature review outcomes

The literature review shows that sustainability is a growing mega-trend globally. It is shaping the fashion industry from different angles, and the industry changes because of this trend's influence. Fashion businesses start to adopt and follow sustainable development practices, although for now it is not cost-effective.

The environmental impact of fashion industries on the planet's ecological state is one of the biggest among all industries, and it is still increasing because of fast fashion. As mentioned before, the market share of the global fashion industry has doubled during the last eight years, leading to the growth of the amount of clothes landfilled or burned.

Fashion businesses promote their sustainability initiatives, such as clothing from sustainable materials and recycling points in stores. As sustainability is a modern mega-trend, it may attract consumers' attention and affect their buying decision, making them buy more new clothing, supporting the fast fashion cycle. For the recycling, as shown before, currently not more than one third of all the amount of clothing sent for recycling is actually recycled into new clothing, because of the complexity of the process. Therefore, the least environmentally-harmful approach for consumers to support sustainable fashion is a responsible consumption and resale market support.

As to the consumers' behavior and buying decision process when it comes to sustainable fashion, clearly, marketers utilize sustainability trend as an influencing factor. For fashion businesses, it is profitable to convince the consumer that sustainability mega-trend can be supported by purchasing of sustainable clothes. However, it is still a fast fashion promotion practice which does not support sustainable initiatives.

Considering all the data collected, the research problem is valid and current. The thesis now proceeds to analyze the research problem in more detail by presenting case studies and a consumer survey.

3 EMPIRICAL RESEARCH

This chapter presents findings and examples of sustainability trend use in fashion businesses an overview on current sustainability-oriented actions two major mass-market fashion companies take. H&M Group and Inditex were chosen for this study because they have the largest number of mass-market clothing shops worldwide: H&M Group has almost five thousand stores worldwide, while Inditex brands are sold in more than seven thousand stores (Statista 2019a; Inditex 2019). Therefore, these companies can be considered to be trend-setters, which other companies tend to follow in order to expand, and they are the most suitable examples to examine to have an overall understanding of the fashion industry.

3.1 H&M Group

H&M (before 1968 – Hennes) was founded in 1947 by a Swedish entrepreneur Erling Persson, who initially was inspired by the way of selling clothes in the U.S. and aimed to implement the modern way of doing business in Europe. Twenty years after the opening of the first store, Persson acquired Mauritz Widforss, a Swedish hunting apparel brand. After this, the company started its expansion not only in the home country but also globally, opening stores in Norway, Denmark and other European countries. By 2000, H&M already operated in most of European countries and opened its first store in the U.S. In the 00's, because of the high investments in marketing, affordable pricing policy and collaborations with high fashion brands like Karl Lagerfeld, Roberto Cavalli and Versace, H&M global expansion was highly supported by its satisfied consumers and in media.

In 2007, H&M Group launched a new brand – COS and acquired brands like Monki, Weekday and Cheap Monday, which also gained popularity worldwide. Today H&M Group holds eight independent brands: H&M, H&M Home, Monki, Weekday, Arket, COS, &other Stories and a new digital-oriented outlet brand Afound. (H&M Group 2019.) According to Statista (2019b), the total gross sales of H&M Group worldwide in 2018 reached 23 billion U.S. dollars.

Lately H&M Group launched H&M Foundation, a non-profit organization founded by Persson family. According to Eric Persson's grandson, Karl-Johan Persson, Board member of H&M Foundation and CEO of H&M, driving long-lasting valuable changes and improving society's lives by supporting people, communities and innovative ideas is the purpose of the Foundation (H&M Foundation 2019). The primary focus areas of H&M Foundation are:

- Education – advocating quality education to children all over the world.
- Water – supporting initiatives to save the Global Ocean and reduce water consumption.
- Equality – fighting the exclusion by helping all marginalized groups to unlock their full potential.
- Planet – ensuring people’s living conditions by protecting the planet. (H&M Foundation 2019.)

Since 2015, the H&M Foundation supports innovative findings in sustainability with an annual Global Change Award. The winners of the Award receive an overall grant of one million euro and company’s support for developing and implementing their sustainable findings into fashion businesses’ production process. (Global Change Award 2019.) All these initiatives help the company to follow its sustainable goals, which have been set during Copenhagen Fashion Summit in 2017. A more detailed description of the Summit outcomes and 2020 Circular Fashion System Commitment is presented in Chapter 2.2.

For consumers who want to support the company in its sustainability actions, H&M launched The Garment Collection Program, the aim of which is to collect consumers’ old clothing in stores and then recycle, reuse for new clothing or resell as second-hand items. Per one bag of old clothing, consumers receive a fifteen percent discount for their next purchase. (H&M USA 2019.) However, the company has been widely criticized for this initiative. Environmental experts proved that only thirty-five percent of clothing collected by H&M is recycled to new products; because of a complicated and costly process of clothing recycle, especially synthetic fibers, a lot of mass-market clothing sent for recycling ends up in a landfill. Some consumers and experts also believe that by giving a discount coupon for throwing old clothing to a recycling bin, H&M aims to drive more traffic to their stores and encourage people to buy new clothing, which leads to a formation of tones of disposed clothing buried in a landfill (Matteis 2018).

Moreover, in 2017 Danish journalists proved that from 2013 to 2017, H&M has burned twelve million tones of clothing in an incinerator in Roskilde, Denmark. Only after the investigation has been published, the company announced that the items burned were infected and dangerous to be reused or recycled, which however was not proved by any independent laboratory tests. (Engell et al. 2017.)

3.2 Inditex

Being one of the largest fashion resellers globally, the Spanish company Inditex holds eight mass-market fashion brands: Zara, Zara Home, Mango, Bershka, Pull&Bear, Stradivarius, Oysho, Massimo Dutti and Uterque. Since 1975, when the first Zara store was opened, Inditex has reached the milestone of seven thousand stores worldwide, with a total revenue of more than twenty-six billion U.S. dollars in 2018. (Inditex 2019.)

According to Dow Jones Sustainability Index, in 2018 Inditex became world's most sustainable retailer (RobecoSAM 2018). The company is implementing sustainable initiatives among all its brands, investing in new materials development and collecting old clothing in their stores. In its recent Commitment to Sustainability Inditex states that after year 2025 none of the clothes produced by the company will be landfilled, as all the materials used in clothing will be fully recyclable (Inditex 2019).

For the last ten years, Zara and other Inditex brands have been constantly criticized for poor working conditions at their production facilities. In 2017, a scandal started because Zara's consumers found notes on the labels of their new clothing, stating that factory workers did not get paid for producing this item (Petter 2017). Also the society accuses Inditex for its environmentally-harmful operations model, as usually it takes less than three weeks from designing an item to its arrival in any store worldwide. By accelerating the speed, Inditex does not support sustainable trade and makes people buy clothing more often.

Zara's designers create more than twelve thousand designs annually, quickly adding items, inspired by high fashion brands, to its collection, which attracts consumers who want to follow the latest trends. Producing more than twenty collections per year, Zara and other Inditex brands convince consumers to buy clothes more often, being a great example of an unsustainable fast fashion company. (Howland 2017.)

3.3 Survey

The survey supports theoretical base of the thesis and reveals consumers' attitudes towards the sustainability trend in the fashion industry. First, the chapter describes the data collection process, including findings from theoretical parts of the thesis and data gathering process. In addition, the analysis process to analyze the collected data is explained.

3.3.1 Survey preparation

In order to measure consumers' attitudes towards the sustainable fashion trend, a survey was created and distributed among potential consumers. The survey questions were created based on the findings presented in the previous chapters.

The survey collects quantitative data; the survey questions were multiple-choice type questions. The first three questions aimed to collect basic background information about the respondent, such as age, gender and region of residence. The next question aimed to find out if the respondent buys clothes from mass-market fashion brands. Questions three to seven were set to find out how often and from which mass-market fashion brands the respondent buys clothes. And the following eight questions measured consumers' awareness and attitude towards sustainable fashion trend in the fashion industry. The survey questions are presented in Appendix 1.

The survey was created on Google Forms platform in September 2019, after over a month of data collection and formulation of Literature review and Empirical research chapters. The online survey was chosen in order to reach a wider audience in all research target regions. The results collection lasted for two weeks, during which the sufficient number of responses has been reached. Analyzing the survey data took place in October 2019.

The link was posted on the author's social media channels (Instagram and Facebook). These channels were chosen to distribute the survey link because the survey's target audience forms a major part of users of these social media platforms. On Instagram, the link to the survey was posted for the author's followers view. On Facebook, the author wrote an engaging post asking people to participate in a thesis survey. The post was published in a group for students of Lahti University of Applied Sciences.

The survey respondents were notified about the purpose of the survey and how its results will be used. The survey focused on the residents of Europe, Russia and U.S. and on the representatives of Generation Z (people born between the mid-1990's and mid-2000's). The survey received one hundred responses in total, which was sufficient to support the thesis findings. The results are presented and analyzed in the following chapter.

3.3.2 Survey analysis

Out of one hundred responses, seventy-two responses were relevant for the research. The relevant responses contained information from the respondents of the target audience of the research: people of Generation Z living in USA, Russia and Europe. Only these responses have been analyzed and used to support this thesis.

The first question was about respondents' age. There were seven options to choose from, but only the results from people who chose options "Under 18" and "18-24" have been used to support the thesis, as they belong to Generation Z. The results, presented in Figure 9, show that out of seventy-two respondents, the majority was from 18 to 24 years old, and the other twenty percent was younger than 18 years old.

Your age

72 responses

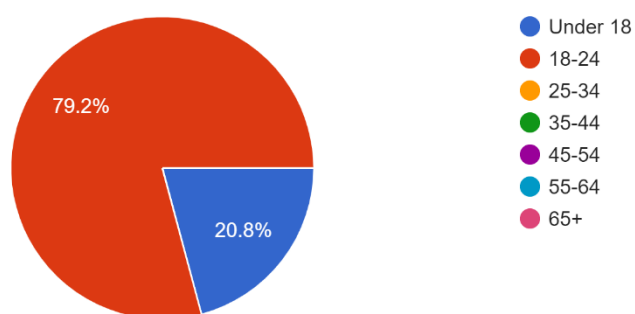


Figure 9 Age of survey respondents

The second question concerned the respondent's gender. As seen from Figure 10, thirty-six of the respondents were men, thirty-five were women and one person preferred not to identify the gender.

Your gender

72 responses

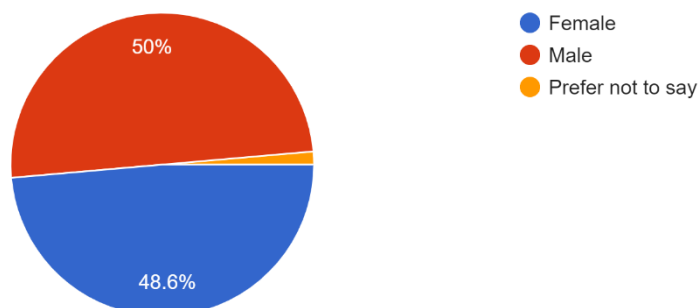


Figure 10 Gender of survey respondents

Question three, as shown in Figure 11, concerned the respondents' region of residence. Thirty-two people were from Europe, twenty-eight from Russia and eleven from the USA. As this question also had an option "Other, please specify", one respondent marked Switzerland as his place of residence. Although Switzerland is not a part of the European Union, as the case study companies information and the overall data collected to support the thesis can also be applied to the Swiss market, the response is still relevant for this thesis.

Your region of residence

72 responses

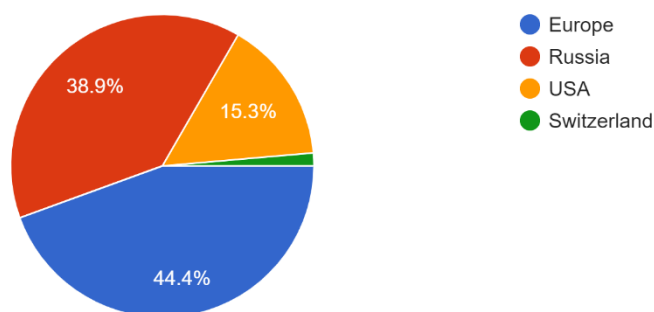


Figure 11 Region of residence of survey respondents

The next question was to check whether the respondents purchase or do not purchase clothes from mass-market fashion brands. As Figure 12 reveals, only eight percent of the respondents do not shop mass-market fashion brands, and the rest have bought clothing from these brands for at least once.

Have you ever bought clothes from mass-market fashion brands (H&M, Zara, Mango etc.)?

72 responses

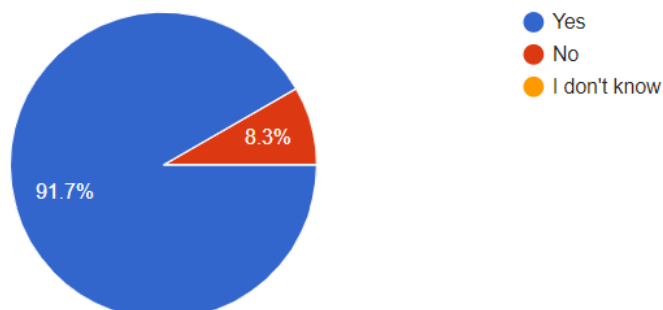


Figure 12 Buying from mass-market fashion brands

The aim of question five was to show the respondents' frequency of buying mass-market fashion brands. Figure 13 illustrates the results, which show that the majority of the respondents bought something from mass-market fashion shops once in six months. A large percentage of respondents also buys from these shops once in a month or two, and an equal number of shops there either once a year or once a week or two.

How often do you buy clothes from mass-market fashion brands?

72 responses

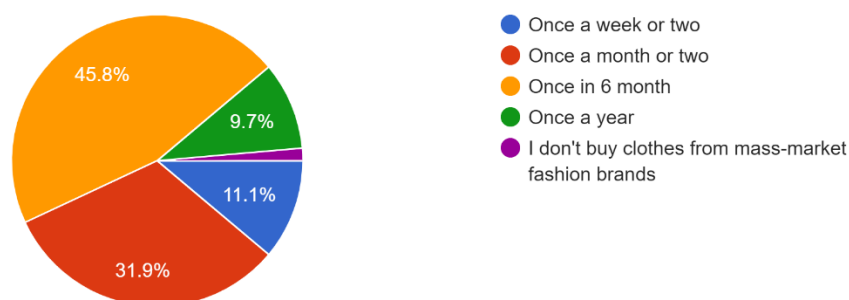


Figure 13 Frequency of shopping in mass-market fashion brands

The next question had a multiple responses option and has been created in order to understand which mass-market fashion brands are preferred by the target audience of the research. The brands chosen were H&M and Inditex's companies (Zara, Mango,

Stradivarius and Bershka) – case companies of this thesis. Also, some other popular mass-market fashion brands have been included to the survey: Primark and Forever 21. The results showed that the most popular brands among the audience are H&M, Mango and Zara – more than a half of the respondents buy from there. More than twenty percent of the respondents buy from Primark, Bershka and Stradivarius, fourteen percent – from Forever 21 and three percent do not buy from these brands. The results are presented in the figure below.

Which brands do you buy from? (Multiple options possible)

72 responses

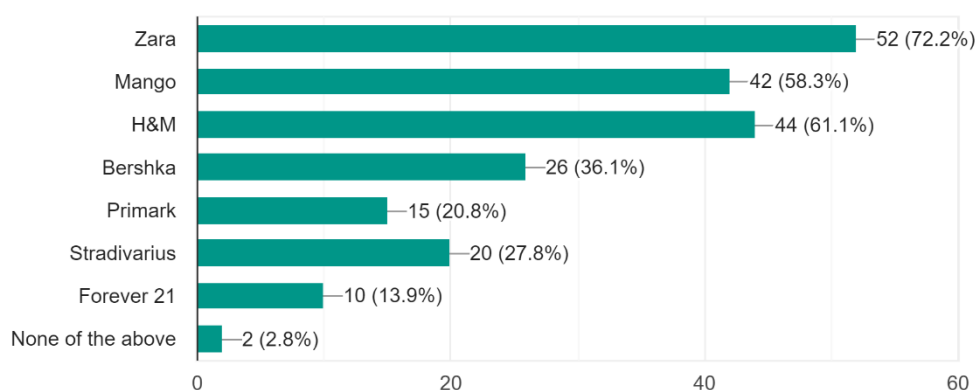


Figure 14 Mass-market fashion brands survey respondents buy clothes from

In the question seven, the author asked the respondents if they happen to notice any of the sustainable fashion initiatives in the stores of mass-market fashion brands. The question also contained two images which aimed to help the respondents better understand the meaning of the question. The images used presented a box for clothing collection and a label of a collection produced from sustainable materials. The images are available in the Appendices part of the thesis. From the results, it is seen that forty-six respondents have noticed such things, and twenty-five did not.

Have you ever seen any sustainable initiatives in mass-market fashion shops (collections made out of recycled...collecting clothes for recycling etc.)?

72 responses

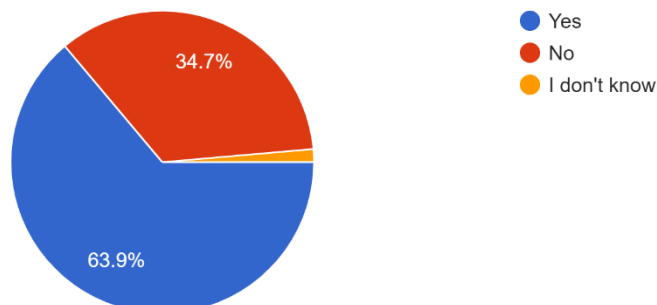


Figure 15 The visibility of mass-market fashion sustainable initiatives

The following question's aim was to see if the respondents have ever bought any type of clothing made from recycled materials. As seen from the results, presented in Figure 15, almost a half of them have bought something from recycled materials. A quarter of respondents did not buy such clothing and another quarter were not sure about it.

Considering respondents' region of residence, there is a noticeable difference between the responses of residents of European countries or U.S. and Russia. As eighty-five percent of respondents who have noticed sustainable initiatives in mass-market fashion stores are located in Europe or U.S., it is clear that in Russia these initiatives are not well presented.

Have you ever bought any type of clothes made out of recycled materials?

71 responses

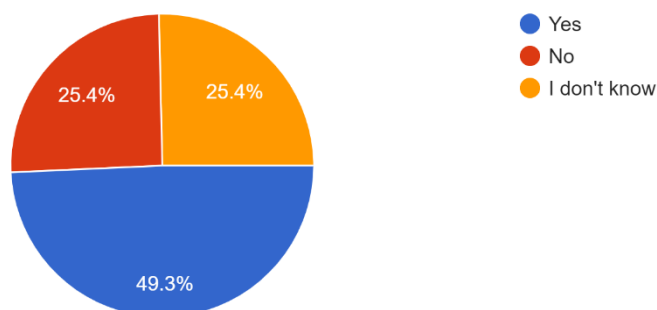


Figure 16 Buying clothes made from recycled materials

The next question was to understand what percentage of the respondents have ever donated their clothes to the recycling points in clothing stores. More than sixty-three percent of the respondents have never done that and only thirty-three percent have done that for at least one time.

For this question, the difference between Russian and European or U.S. consumers is also considerable. Forty out of forty-six respondents who replied “No” for this question are living in Russia. The results of this question are presented in Figure 16.

Have you ever donated your old clothes to the recycling bins in clothing stores?

72 responses

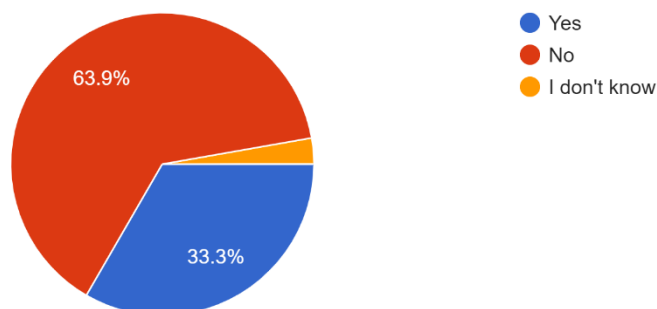


Figure 17 Old clothes recycling in clothing stores

Question number ten had an option of multiple answers and was set in order to understand what respondents do with their old but still in good condition clothing. According to the results in Figure 16, more than seventy-seven percent of the respondents choose to give it to their friends or relatives. Throwing clothes away and reselling were also considered as an option for many of the respondents, while recycling (either in clothing stores or via other recycling facilities) are not popular among a large number of survey respondents.

The influence of the geographical aspect might be the case of such a result, as in Russia, comparing to Europe and U.S., the recycling culture is not as well developed. Although, as the majority of the respondents were from European countries or U.S., this factor could not influence the overall result.

What do you do with your old (but still in good condition) clothing? (multiple options possible)

71 responses

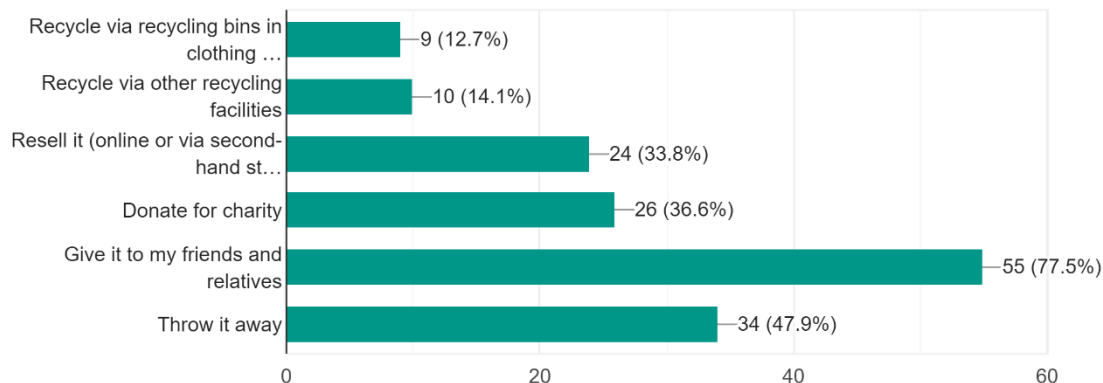


Figure 18 What do survey respondents do with their old clothing?

The purpose of next question was to evaluate how important people find buying clothes made from recycled materials and if they are prepared to pay more for it. A full question is and the results are visually presented in Figure 17. From the results, it is clear that for almost seventy percent of the respondents it is more important to buy sustainable clothing than saving money.

If you shop for a new t-shirt and you like a basic model (10€), but there is also the same t-shirt made out of a ful...e materials, would you pay more for it?

71 responses

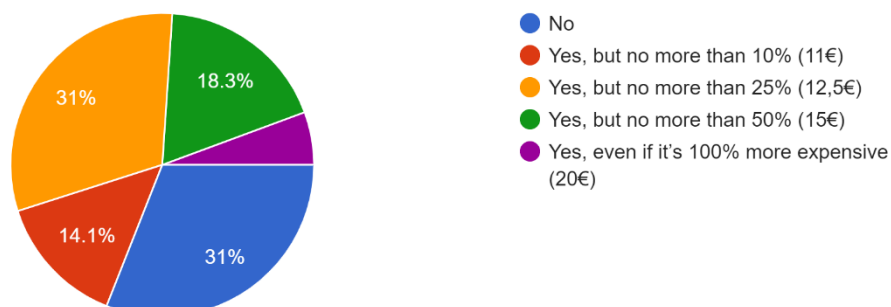


Figure 19 Are survey respondents willing to pay more for sustainable clothing?

The next two questions were dedicated to the concept of responsible consumption, which is described in detail in sub-chapter 2.4. Question number twelve was to check if the respondents follow the principles of responsible consumption and try to buy less unneeded clothes. The results showed that half of them try to follow the responsible consumption practices, twenty-four people do not try to follow it and twelve people are not sure or not aware enough of this concept.

Do you try to follow responsible consumption trend and buy less clothes?

72 responses

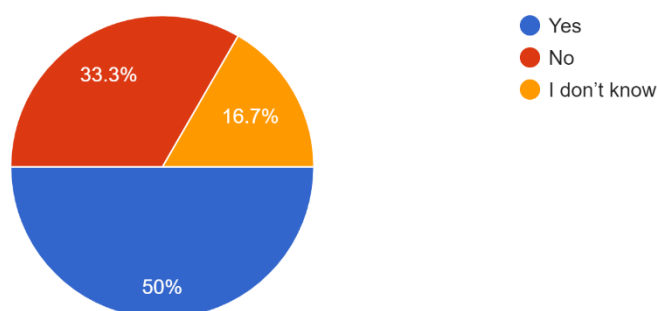


Figure 20 Responsible consumption

In the last question of the survey, the author is measuring how many of the respondents have ever bought any clothes from the second-hand or vintage stores. As seen from the Figure 19, forty-six of the survey respondents have bought clothes from there, and twenty-four have never done that.

Have you ever bought clothes from second hand or vintage stores?

72 responses

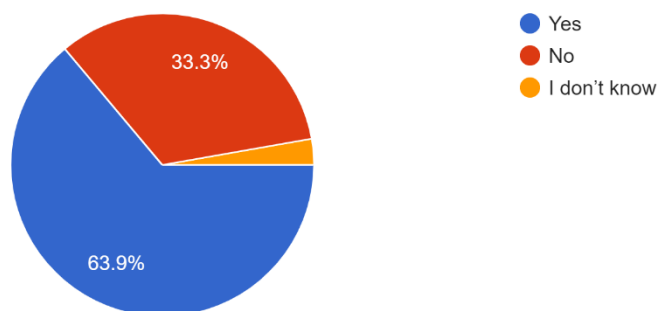


Figure 21 Second-hand and vintage stores

3.4 Empirical research outcomes

Analyzing sustainability actions of two major mass-market fashion businesses take, the overall industry tendencies regarding the sustainability trend can be reviewed and predicted. Both Inditex and H&M Group have stated their sustainability goals for the near future and listed the actions they promise to take for being more environmentally-friendly in the future.

As stated before in the Literature review outcomes sub-chapter, both companies are promoting sustainability among consumers by producing collections made from recycled materials and collecting old clothing in stores. Some experts criticize companies for these actions, as it more seems to be a marketing trick, making people buy more, than a sustainability-oriented initiative.

The outcomes of the survey conducted are following the analysis part. From the data gathered during the survey, only the responses of the relevant target group were analyzed. The respondents were mostly 18 to 24 years old and the majority of them were living in Europe. As to the gender of the respondents, there was a minor difference between men and women.

When it came to mass-market fashion, the significant part of the respondents showed that they do buy from mass-market fashion brands at least once a year and most of them buy from two or more brands. This is due to the inclusivity and inexpensive clothes, which is affordable for almost all Generation Z representatives in the target regions. H&M and Inditex companies were named as the most preferred brands, which is a result of a high number of its' stores worldwide and a fast flow of collections produced.

For the questions dedicated to sustainable initiatives of mass-market fashion, the majority of respondents flagged that they had noticed sustainable initiatives in the fashion industry and bought clothes made from recycled materials. Moreover, people were ready to pay more for clothes made from recycled materials, although a small number of respondents were not aware of sustainable fashion concept and considered clothing price to be a more important factor than the material.

It is seen from the survey results that clothes donation to the recycling bins in stores is the least preferred option when it comes to the recycling. The respondents preferred to give their old clothing to their friends or relatives or resell it; one of the most popular options for respondent was throwing their clothes away, which means that many people are still not accustomed to clothes recycling.

The last block of questions was dedicated to the problem of responsible consumption. As has already been stated in the Literature review, the results proved that people of Generation Z try to follow the responsible consumption practices. This includes buying less clothes and shopping at second-hand and vintage stores.

Considering the geographical aspect, it is clear that residents of Europe and U.S. are more aware of fashion businesses' sustainable initiatives. For now, fashion businesses in Russia do not support sustainability trend as much as in other regions presented in this survey, so Russian consumers cannot fully contribute to this trend.

4 CONCLUSION

This chapter summarizes the findings of the study, including the data collected from the literature review and empirical research. First, the research questions are answered. Secondly, the validity and reliability of the study are discussed. Finally, the chapter presents some suggestions for further research.

4.1 Answers to the research questions

To answer the main research question, the three subordinate questions should be answered.

What is the sustainable fashion trend?

As sustainability is a modern mega-trend, it is currently influencing almost all the aspects of people's lives. Sustainable development is devoted to meet the needs of people, benefit the economy and preserve planet's natural resources, keeping a stable ecological state. Fashion businesses are following this trend and making their commitment towards the sustainable future by various consumer- and business-oriented initiatives, which aim to regulate and decrease the harmful ecological influence of the industry.

Based on the outcomes of the Literature review chapter, there are two different views regarding the sustainability trend in the fashion industry. Some consumers and businesses are seeing the sustainable fashion trend as a positive way for future development. However, some people believe that it is only one of the current trends companies follow in order to attract consumers and make them buy more clothes, which only leads to a continuous growth of the amount of clothes burned or landfilled yearly. For example, although recycling is currently heavily advertised by major mass-market fashion brands, only one percent of clothes collected is recycled into new garments, and the rest ends up in a landfill.

What actions do fashion businesses take to become sustainable?

Major fashion-producing companies are being involved into various sustainability agreements and commitments. The primary goal of all these commitments is to turn the industry to a more sustainable and circular way of operating by implementing cyclable design strategies and increasing the amount of clothes produced from recycled materials and clothes collected for recycling.

Fashion businesses invest their resources in the development of new eco-friendly materials and support the implementation of sustainable production and recycling strategies. The goal of these investments is to improve ways of operating and, at the same time, resolve such issues as water waste and disposing soil with chemicals.

Many fashion brands, including the case companies of this thesis, promote sustainability among their consumers. Inditex and H&M Group launched their programs for collecting old clothing for recycling, which works in many of their stores worldwide. Both case companies produce collections made from recycled materials. As already concluded before, these initiatives are criticized by some industry experts. As consumers usually get a discount for recycling in fashion stores, they then use it for purchasing new clothes. The lifecycle of the collections made from recycled materials is very slow, as most of the mass-market fashion companies launch about twenty collections annually. In the end, this leads only to development of fast, unsustainable fashion.

The results of the consumers' survey showed that, although a large number of respondents have noticed sustainable initiatives presented by fashion businesses, they do not fully use them. The majority of the respondents did not recycle old clothing in fashion stores, and less than a half of the respondents has ever bought a piece of clothes made from recycled materials.

How do consumers support the sustainable fashion trend?

Besides supporting fashion businesses' sustainable initiatives, consumers take actions themselves in order to support sustainability trend in the fashion industry. Consumers adopt some of the zero-waste way of living practices, such as responsible clothing consumption and re-sale market support.

The outcomes of the survey conducted to support this thesis revealed that the majority of the research's target group is trying to follow the principles of responsible consumption and buy less clothes. Also, more than a half of the respondents showed that they shop at second-hand or vintage stores, prolonging clothes lifecycle. Moreover, consumers showed that for their old clothes, they would rather prefer to re-sell or give it for free to others than to recycle it.

How do consumers perceive the sustainability trend in the fashion industry?

The main research question of this thesis is: How do consumers perceive the sustainability trend in the fashion industry? Clearly, the majority of consumers notice the influence of the sustainability trend on fashion industry. The overall growth of the market size of this industry and the following increase of the amount of clothes burned or landfilled yearly could not remain unnoticed by the consumers.

Consumers do notice the initiatives fashion brands implement into their operations in order to become more sustainable and mainly support it. Consumers tend to value the sustainable characteristics of clothes they buy over its price, which represents the influence of

sustainability trend on their buying decision. Fully-recyclable and made from recycled materials collections fashion brands produce bring a lot of attention from consumers' side. However, the recycling initiatives introduced by the case companies of this thesis do not yet attract consumers' attention a lot and they mainly do not recycle their old clothing in fashion stores.

As recycling is not the most preferred option when it comes to the old clothing, consumers would rather choose to give it to their friends and relatives or resell it. By doing this, they support responsible consumption idea, which is a part of sustainable fashion trend. Consumers try to make their buying decisions more responsibly and give a second life to their clothes by reselling or bargaining it away. Because responsible consumption does not damage planet's natural resources, for now, it is the least environmentally harmful way for consumers to support sustainable fashion trend. And the positive tendency is the resale market has grown twenty-one times faster than retail during the last three years. Second-hand and vintage stores are mostly visited by the representatives of world's largest age groups - the Millennials and Generation Z. Considering these facts, it can be concluded that consumers see sustainable fashion trend positively and support its growth, which will lead to trend's faster development and bigger influence on the consumers and businesses in the future.

4.2 Validity and reliability

According to Saunders, the validity of the research is an extent to which research findings are about what they were expected to be about (Saunders et al. 2009, 603). Research reliability is an extent to which the data collected during the research would lead other researchers of the topic to the same conclusions (Saunders et al. 2016, 726).

The primary goal of this thesis was to answer the main research question and the subordinate questions. The answers to all research questions are presented in the Chapter 4. Secondary data gathered to support the Literature review and Empirical research chapters comes from relevant public printed or digital sources, with all the references carefully checked and listed in alphabetical order in the end of this thesis. Printed sources used to support this thesis are either academic literature for business researchers or experts' reports which evaluate current world's environmental state. Digital sources which support this study are primarily publications and articles from world-renowned online media.

The primary source of data of this thesis is the survey. It collected one hundred responses in total, out of which seventy-two were considered to be valid for this research. A larger number of responses might make the research more valid, however a relatively small

amount of data collected is easier to be analyzed carefully and without any inaccuracies. The survey results are reliable for its target group – people of Generation Z living in Russia, Europe and U.S., and for other customer groups the results of the survey might not be the same in other researches. In the nearest time, the results of this research can be considered reliable and valid.

4.3 Suggestions for further research

This thesis analyses consumers' perceptions of the sustainability trend in the fashion industry. Regarding further research, this topic can be analyzed from the businesses perspective to measure sustainability trend's influence on the industry.

Moreover, as the data presented in the Literature review and Empirical research chapters is only valid for specific regions (U.S., Russia and Europe), future studies may be conducted on the same topic, but with a focus on other regions.

Additionally, further research may also study the same topic with a focus on the high fashion brands. Therefore, other case companies and target audiences will be needed in order to receive relevant results.

5 SUMMARY

The main purpose of this thesis was to understand how consumers see the sustainability trend in the fashion industry. The research aimed to define the ways fashion brands use to promote sustainability trend and how the consumers see and support this trend. In order to give an answer to the main research questions and subordinate questions, the research has been conducted utilizing such methodology as literature review, a case study analysis and a survey. The thesis had some limitations, and the research concentrated on the mass-market fashion brands and the consumers from Generation Z age group, living in Russia, U.S. and Europe.

Firstly, the theoretical concepts supporting the research were introduced. The theoretical base about sustainability and its impact on fashion industry, fashion businesses environmental impact, responsible consumption, influences of consumer behavior, buying behavior and trends and mega-trends was analyzed and described in Literature review chapter. These theoretical findings were used to formulate the research hypotheses and research questions.

The next chapter was devoted to the empirical research methods of this thesis. First of all, the sustainability-oriented activities of two major mass-market fashion companies were analyzed. The main sustainability-oriented activities of mass-market fashion brands were indicated: providing recycling facilities for consumers in stores and producing collections made from recycled materials. This analysis and its outcomes were used to formulate the survey questions. The survey was concentrating on the consumers' attitude towards sustainability trend in the fashion industry. The results of the survey revealed that consumers have an overall positive attitude towards the sustainability trend in the fashion industry and are willing to support some sustainability initiatives fashion brands implement into their operations.

However, currently consumers are more open to the responsible consumption initiatives. They would rather choose to give their old clothes to their friends and relatives or resell it. Consumers tend to make their buying decisions carefully so that they do not harm the environment. As the resale market continues its growth and consumers from Generation Z age group support it, it is clear that in the near future the sustainability trend in the fashion industry will continue to develop and influence more consumers and businesses.

LIST OF REFERENCES

Written references

ADEME. 2016. Preventing Waste Overview. ADEME Éditions.

Dincer, I. & Rosen, M. A. 2013. Exergy: Energy, Environment and Sustainable Development. Second Edition. Elsevier Ltd.

Ellen MacArthur Foundation. 2017. A New Textiles Economy Report. Ellen MacArthur Foundation Inc.

Khan, M. 2006. Consumer Behaviour and Advertising Management. New Age International (P) Ltd., Publishers.

Kotler, P. & Keller, K. L. 2016. Marketing Management. Fifteenth Edition. Pearson Education Limited.

Muthu, S. S. 2019. Sustainable Fashion: Consumer Awareness and Education. Springer Nature Singapore Pte Ltd.

Sanneh, E. S. 2018. Systems Thinking for Sustainable Development: Climate Change and the Environment. Springer International Publishing AG.

Saunders, M., Lewis, P. & Thornhill, A. 2009. Research Methods for Business Students. Fifth Edition. Pearson Education Limited.

Saunders, M., Lewis, P. & Thornhill, A. 2016. Research Methods for Business Students. Seventh Edition. Pearson Education Limited.

Singh, S. 2012. New Mega Trends. Implications for our Future Lives. First Edition. Palgrave Macmillan.

Solomon M., Bamossy G., Askegaard S. & Hogg M. K. 2006. Consumer Behavior: A European Perspective. Third Edition. Pearson Education Limited.

Electronic references

Ananas Anam. 2019. Piñatex®: About Us. Ananas Anam [accessed 2 September 2019]. Available at: <https://www.ananas-anam.com/about-us/>

Biese, M. 2019. Why Plastic Has No Place in the Fashion Industry, Including Recycled Plastic. The Green Girl [accessed 2 September 2019]. Available at: <http://www.thegreengirl.com/why-plastic-has-no-place-in-the-fashion-industry-including-recycled-plastic/>

Byrne, P. Microfibres: The Plastic in Our Clothes. Friends of the Earth [accessed 2 September 2019]. Available at: <https://friendsoftheearth.uk/plastics/microfibres-plastic-in-our-clothes>

CGS. 2019. Retail Sustainability Infographic. CGS [accessed 2 September 2019]. Available at: https://www.cgsinc.com/sites/default/files/media/resources/pdf/CGS_2019_Retail_Sustainability_infographic.pdf

Conca, J. 2015. Making Climate Change Fashionable - the Garment Industry Takes on Global Warming. Forbes [accessed 1 August 2019]. Available at: <https://www.forbes.com/sites/jamesconca/2015/12/03/making-climate-change-fashionable-the-garment-industry-takes-on-global-warming/#54163a1479e4>

Cooper, K. 2018. Fast Fashion: Inside the Fight to End the Silence on Waste. BBC News [accessed 20 August 2019]. Available at: <https://www.bbc.com/news/world-44968561>

EDUCBA. 2019. 4 Important Factors That Influence Consumer Behaviour. EDUCBA [accessed 2 September 2019]. Available at: <https://www.educba.com/4-factors-influencing-consumer-behaviour/>

Engell, C., Vegendal, S. & Frederiksen L. C. 2017. Ekspertter Undrer Sig Over H&M's Afbrænding Af Nyt Tøj. TV 2 [accessed 5 September 2019]. Available at: <https://nyheder.tv2.dk/samfund/2017-10-15-ekspertter-undrer-sig-over-hms-afbraending-af-nyt-toej>

Global Change Award. 2019. Global Change Award: About. Global Change Award [accessed 4 September 2019]. Available at: <https://globalchangeaward.com/>

Global Fashion Agenda. 2019. 2020 Commitment. Global Fashion Agenda [accessed 20 August 2019]. Available at: <http://www.globalfashionagenda.com/commitment/>

H&M Group. 2019. H&M Group: History. H&M Group [accessed 3 September 2019]. Available at: <https://hmgroup.com/brands/hm.html>

H&M Foundation. 2019. H&M Foundation: Our Purpose. H&M Foundation [accessed 3 September 2019]. Available at: <https://hmfoundation.com/hm-foundation/>

H&M USA. 2019. Garment Collecting. H&M USA [accessed 5 September 2019]. Available at: https://www2.hm.com/en_us/women/campaigns/16r-garment-collecting.html

Howland, D. 2017. Report 'Ultra-fast' Fashion Players Gain on Zara, H&M. Industry Dive [accessed 5 September 2019]. Available at: <https://www.retaildive.com/news/report-ultra-fast-fashion-players-gain-on-zara-hm/443250/>

Inditex. 2019. About Us: Around the World. Inditex [accessed 3 September 2019]. Available at: <https://www.inditex.com/about-us/inditex-around-the-world#continent/000>

Inditex. 2019. Our Commitment to Sustainability. Inditex [accessed 5 September 2019]. Available at: https://www.inditex.com/documents/10279/249245/Dossier_JGA_2019_EN.pdf/1664de2f-ca77-3a40-2b78-cace74c06c82

Interbrand. 2018. Best Global Brands 2018 Rankings. Interbrand [accessed 15 August 2019]. Available at: <https://www.interbrand.com/best-brands/best-global-brands/2018/ranking/>

Kenton, W. 2018. Mass-Market Retailer. Investopedia [accessed 4 August 2019]. Available at: <https://www.investopedia.com/terms/m/mass-market-retailer.asp>

Lexico. 2019. Sustainability. Lexico [accessed 4 August 2019]. Available at: <https://www.lexico.com/en/definition/sustainability>

Martinko, K. 2017. Which Fabrics Are Most Sustainable? Narrative Content Group [accessed 2 September 2019]. Available at: <https://www.treehugger.com/sustainable-fashion/do-you-know-which-fabrics-are-most-sustainable.html>

Matteis, S. 2018. What Really Happens to Old Clothes Dropped in Those In-Store Recycling Bins. CBC [accessed 5 September 2019]. Available at: <https://www.cbc.ca/news/business/clothes-recycling-marketplace-1.4493490>

Miller, L. J. & Lu, W. 2018. Gen Z Is Set to Outnumber Millennials Within a Year. Bloomberg [accessed 2 September 2019]. Available at: <https://www.bloomberg.com/news/articles/2018-08-20/gen-z-to-outnumber-millennials-within-a-year-demographic-trends>

Petter, O. 2017. Are Zara Labourers' 'Pleas for Help': The Result of a Fast-Fashion Business Model? Independent [accessed 5 September 2019]. Available at: <https://www.independent.co.uk/life-style/fashion/zara-labourers-plea-for-help-fast-fashion-business-model-h-m-primark-a8040601.html>

Pinnock, O. 2019. 5 Innovative Fashion Materials Made from Food By-Products. Forbes [accessed 2 September 2019]. Available at:

<https://www.forbes.com/sites/oliviapinnock/2019/01/23/5-innovative-fashion-materials-made-from-food-byproducts/#3e1a5ff75749>

Pownall, A. 2019. Hugo Boss Designs Vegan Shoes That Replace Leather with Pineapple-Based Material. Dezeen [accessed 2 September 2019]. Available at: <https://www.dezeen.com/2019/01/04/hugo-boss-vegan-shoes-pineapple-pinatex-design/>

Resnick, B. 2019. More Than Ever, Our Clothes Are Made of Plastic. Just Washing Them Can Pollute the Oceans. Vox Media [accessed 2 September 2019]. Available at: <https://www.vox.com/the-goods/2018/9/19/17800654/clothes-plastic-pollution-polyester-washing-machine>

RobecoSAM. 2018. DJSI 2018 Review Results. RobecoSAM [accessed 5 September 2019]. Available at: https://www.robecosam.com/media/0/4/3/043cd016c8d1952fdd23ee4b2dac909d_review-presentation-2018_tcm1016-14658.pdf

Schofield, T. 2019. What Is Consumer Behavior in Marketing? - Factors, Model & Definition. Study.com [accessed 2 September 2019]. Available at: <https://study.com/academy/lesson/what-is-consumer-behavior-in-marketing-factors-model-definition.html>

Singh, G. 2017. The Evolution of Clothing: How Fast Fashion Has Completely Changed the Game. Medium [accessed 17 August 2019]. Available at: <https://36chapters.com/the-evolution-of-clothing-consumption-17fa92d9bde9>

Smits, H. 2018. The Time Is Now for Recycled Cotton—And Here's Why. Sourcing Journal [accessed 2 September 2019]. Available at: <https://sourcingjournal.com/topics/thought-leadership/recycled-cotton-111935/>

Statista. 2019a. Number of Stores of the H&M Group Worldwide As of 2018, By Selected Country. Statista [accessed 3 September 2019]. Available at: <https://www.statista.com/statistics/268522/number-of-stores-worldwide-of-the-hundm-group-by-country/>

Statista. 2019b. Gross Sales of H&M Group Worldwide from 2007 to 2018. Statista [accessed 3 September 2019]. Available at: <https://www.statista.com/statistics/252190/gross-sales-of-the-h-und-m-group-worldwide/>

Steele, V. & Major J. S. 2019. Fashion Industry. Encyclopædia Britannica, Inc. [accessed 15 August 2019]. Available at: <https://www.britannica.com/art/fashion-industry/>

ThredUP. 2019. Annual Resale Report. ThredUP [accessed 2 September 2019]. Available at: <https://www.thredup.com/resale>

TRENDONE GmbH. 2019. Sustainability Mega-trend. TRENDONE GmbH [accessed 31 July 2019]. Available at: <https://www.trendone.com/en/trend-universe/mega-trends/mega-trend-detail/sustainability.html>

United Nations. 1987. Report of the World Commission on Environment and Development: Our Common Future. United Nations [accessed 8 August 2019]. Available at: <https://sustainabledevelopment.un.org/content/documents/5987our-common-future.pdf>

United Nations. 2002. Report of the World Summit on Sustainable Development. United Nations [accessed 9 August 2019]. Available at: <http://www.un-documents.net/aconf199-20.pdf>

United States Environmental Protection Agency. 2015. Textiles: Material-Specific Data. United States Environmental Protection Agency [accessed 19 August 2019]. Available at: <https://www.epa.gov/facts-and-figures-about-materials-waste-and-recycling/textiles-material-specific-data>

Oral references

No Impact Man. 2009. Dir. Gabbert, L. & Schein, J. Wri. Beaven, C. Eden Wurmfeld Films, Shadowbox Films Inc.

APPENDICES

Appendix 1. Survey framework

Your age

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+
- Other: _____

Your gender

- Female
- Male
- Prefer not to say

Your region of residence

- Europe
- Russia
- USA
- Other: _____

Have you ever bought clothes from mass-market fashion brands (H&M, Zara, Mango etc.)?

- Yes
- No
- I don't know

How often do you buy clothes from mass-market fashion brands?

- Once a week or two
- Once a month or two
- Once in 6 month
- Once a year
- I don't buy clothes from mass-market fashion brands

Which brands do you buy from? (Multiple options possible)

- Zara
- Mango
- H&M
- Bershka
- Primark
- Stradivarius
- Forever 21
- None of the above

Have you ever seen any sustainable initiatives in mass-market fashion shops (collections made out of recycled materials, bins collecting clothes for recycling etc.)?



- Yes
- No
- I don't know

Have you ever bought any type of clothes made out of recycled materials?

- Yes
- No
- I don't know

Have you ever donated your old clothes to the recycling bins in clothing stores?

- Yes
- No
- I don't know

What do you do with your old (but still in good condition) clothing? (multiple options possible)

- Recycle via recycling bins in clothing shops
- Recycle via other recycling facilities
- Resell it (online or via second-hand store)
- Donate for charity
- Give it to my friends and relatives
- Throw it away

If you shop for a new t-shirt and you like a basic model (10€), but there is also the same t-shirt made out of a fully recycleable materials, would you pay more for it?

- No
- Yes, but no more than 10% (11€)
- Yes, but no more than 25% (12,5€)
- Yes, but no more than 50% (15€)
- Yes, even if it's 100% more expensive (20€)

Do you try to follow responsible consumption trend and buy less clothes?

- Yes
- No
- I don't know

Have you ever bought clothes from second hand or vintage stores?

- Yes
- No
- I don't know