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How Companies Can Overcome the Barriers to Sustainability in the Fashion Industry

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**How Companies Can Overcome the Barriers to Sustainability
in the Fashion Industry**

by

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Advisor: Dr. Amy Farmer

**An Honors Thesis in partial fulfillment of the requirements for the degree Bachelor of
Science in Business Administration in Finance.**

**Sam M. Walton College of Business
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Fayetteville, Arkansas**

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Abstract

The primary intent of this paper is to explore existing case studies on the barriers to sustainability in the fashion industry as well as incorporate my own contributions by crafting and analyzing the results of a survey. This survey will give insight to the attitudes and behaviors of respondents towards sustainable fashion. I will also investigate government policies on this topic, or the lack thereof. Finally, I will offer my recommendation on how businesses can overcome the barriers to sustainability in the fashion industry.

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Introduction

Thirteen years. That is how long it would take to drink the water used to make one pair of jeans and one t-shirt. The fashion industry is responsible for 8% to 10% of global carbon emissions, making them the second largest consumer of water in the world (Gilfeather 2019). Sustainable fashion, also called slow fashion, is more than just using sustainable materials. While this is a big contributor, being sustainable has to do with the whole supply chain, production process, and after-life of clothing. From the design, raw material production, manufacturing, transport, and final sale to the reuse and recycling of the product once in consumer hands. In addition to the effects on the environment, sustainability also deals with the effects on society. This means the ethical treatment of workers with the improvement of working conditions as well as ending any participation in animal testing. The goal of sustainability is to meet the needs of consumers today without destroying the needs of future generations. So, why then are businesses worldwide not all dedicated to becoming fully sustainable? When companies consider the transition to slow fashion, they fail to focus on long term benefits instead of increased revenue today. Although sustainable practices are ideal, there are many barriers that limit the mobilization of sustainability in the fashion industry including rapid globalization, lack of awareness, and a desire for economic growth. It is important to recognize these challenges in order to figure out ways around them and to fully understand why companies may or may not choose to become sustainable.

Literature Review

A major barrier to sustainability from the perspective of fashion companies is the increased globalization of the world economy. According to a research article published in 2014 from the SAGE Journal of Macromarketing, the supply chain of the fashion industry has become “highly fragmented, complex, and less transparent” (Ertiken 2014). In an effort to become globally competitive, manufacturers outsource their production to different countries around the world, allowing them to be low cost efficient. This disconnect in the manufacturing process makes it extremely difficult to oversee production methods. There is no way to guarantee labor practices are ethical and high environmental standards are being met. This article also argues “globalization processes distance the [consumer] from the social and environmental consequences of the goods consumed” (Ertiken 2014). When a supply chain is this spread out, consumers do not typically understand the effects of their purchases. There are not enough communication efforts to inform the public of the consequences of their consumption practices. This research article offers a different perspective as it analyzes practices from a more holistic, macro level view. By looking at each sector, from design all the way to consumption, one can understand the transition to sustainability involves participation from all parties and cannot be achieved from just focusing on one aspect of the production process. A gap in this research needing further exploration is how businesses who practice sustainability can become profitable.

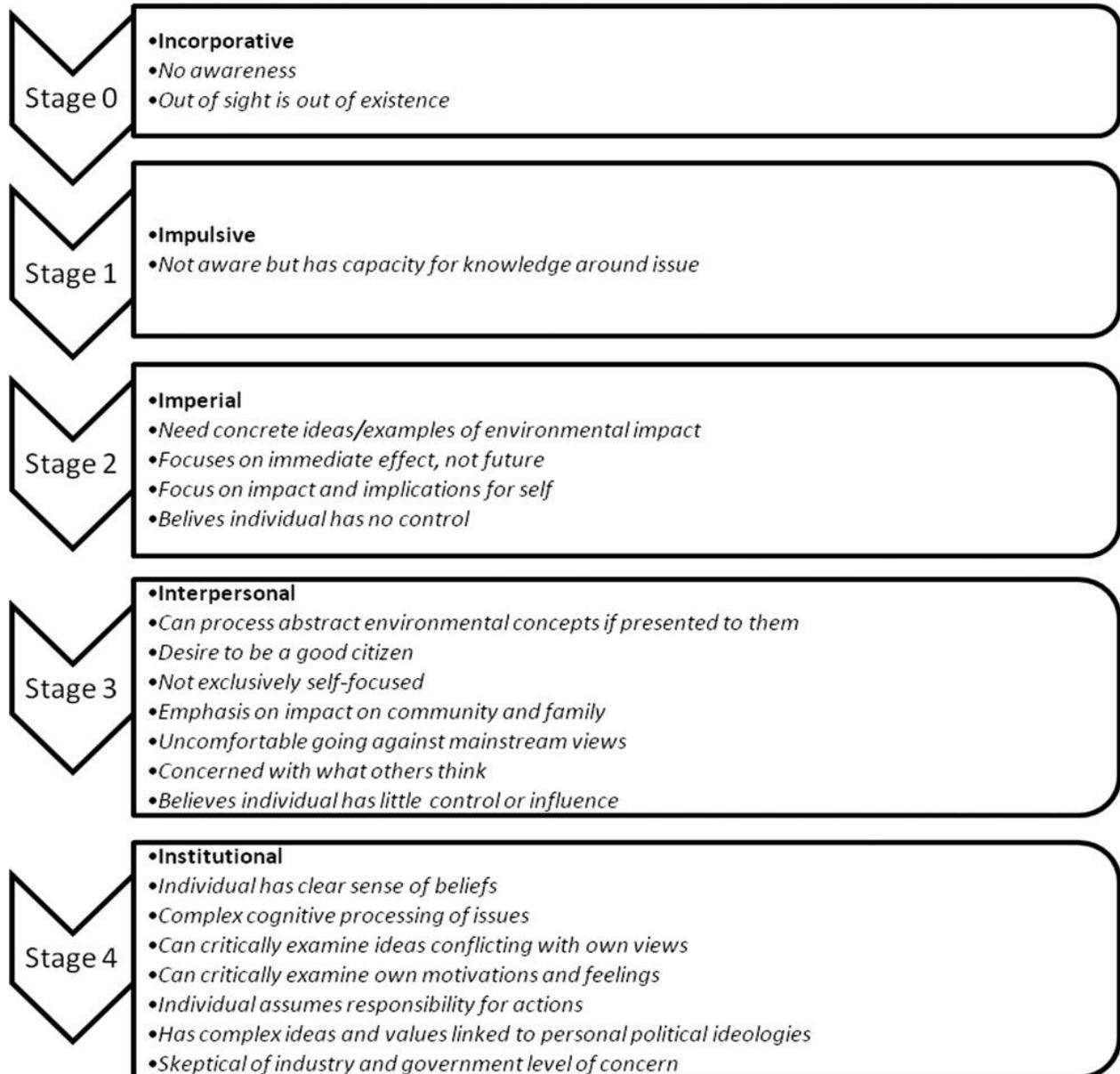
Another major barrier to sustainability in the fashion industry is the lack of awareness of both producers and consumers. When individuals and corporations do not comprehend what it means to be one hundred percent sustainable, it is hard to change practices. A global expert study on sustainable fashion published in 2015 from the Journal of Fashion Marketing and Management indicates the “scale and scope of current approaches to sustainability are limited,” and they “fail to address more fundamental challenges to dominant business models” (Pederson 2015). This research study focused on the discussions of 36 fashion experts from 13 different countries. In comparison to the arguments made in the aforementioned article, many of the

experts agreed that making fundamental changes to every process is the key to sustainability initiatives. A significant problem, stated by one of the experts, is corporations tend to focus on one aspect of the process and try to make it “less bad” by simply changing a small portion of a certain material. Having this narrow scope limits the companies’ abilities to create positive change in environmental and social aspects of the world. A contributing factor to this notion of being “less bad” is their lack of knowledge of sustainability. Many companies believe making small changes here and there truly helps the environment, but if they were to actually understand the long-term effects of their production processes, they would know real change includes every factor in the processes of manufacturing, sale, and afterlife of their products. Another expert argued “for sustainability to work, all the actors in the supply chain have to work together to link their activities” (Pederson 2015). The limitation of this study includes the small representation of experts, so it cannot be generalized to the masses.

On the consumer side, there are two types of individuals when it comes to sustainability. Those who are not aware of sustainable practices, and those who are aware but have a hard time differentiating between companies who are actually sustainable and those who just claim to be sustainable. According to the research article from the SAGE Journal of Macromarketing, various retailers and fashion brands use labels such as “sweat-shop free, organic, natural, vintage, and eco” to convince consumers their products are made ethically and are environmentally friendly (Ertiken 2014). This can be extremely confusing for a consumer who values slow fashion. As for the consumers who are not aware of the impacts of the fashion industry, they seem to be the majority. Although the number of ethical fashion supporters is steadily increasing, the size of this group is still relatively low when compared to the rest of the world.

In a study published in the International Journal of Consumer Studies in 2015, the author explored the attitudes of consumers on sustainability in the fashion industry. Twenty-eight individuals were surveyed on the same day in the main shopping area of New Zealand. They were asked to record their perceptions of sustainability and ethics as well as how this affected their consumption choices. The study showed a general understanding of sustainability in normal consumption habits, but when asked about the fashion industry specifically, consumer understandings were very narrow.

Figure 1: The Five Stages of Consumer Awareness on Sustainability



The table above was used as a basis for the research study performed in New Zealand in 2015 and details the different stages of attitudes on sustainability. This flowchart starts from a point of no awareness of the impacts of unsustainable practices in Stages 0 and 1, and progresses all the way into Stage 4, where consumers have complete awareness of environmental impacts and believe they can make a difference. It is important to note individuals can move into later stages of the chart as they develop “psychological sophistication” allowing them to have an “increased concern for things and people other than the self” (McNeill 2015).

Another outcome of this study was the emergence of the “social consumer” (McNeill 2015). The social consumer is someone who has an increased concern for the fashion industry’s

impact on the environment and desire to support sustainable businesses but has inconsistencies in their attitudes and behaviors. These individuals seem to only practice sustainability when it is convenient and quickly turn back to fast fashion when it is the easier choice, or if it is to keep up with the latest fashion trends. This attitude-behavior gap on the consumer side can be compared to the 2014 research article in the SAGE Journal. This article argues that even when consumers have a positive view of sustainability and understand that their consumption practices have negative effects on the environment, their behaviors do not reflect this attitude. These consumers still participate in fast fashion since they tend to “avoid acknowledging environmental problems when such awareness conflicts with their [...] material needs” (Ertiken 2014). An additional contributing factor to this attitude-behavior gap is the concern for aesthetics. Clothing has always been a symbol of status, and sustainable fashion is many times perceived as undesirable or unattractive. Consumers value keeping up with current trends and worry slow fashion would not help them achieve this.

As claimed by a research study published in the Journal of Fashion Marketing and Management in 2016, the gap in consumer attitudes on the environment in general and sustainable purchasing behaviors can be explained by the participants’ perception of the sustainable fashion industry. This study conducted in depth interviews with 16 university students in the Midwest and collected data on their perceptions of the fashion industry. Throughout the course of the interviews, the researchers found each of the students had a positive view towards sustainability, and they even practiced it in their everyday lives by turning off lights and using energy saving machines. But when asked specifically about the fashion industry, most of the students claimed they do not purchase from ethical brands. The students’ reasons for this discrepancy were that eco-friendly brands are not actually sustainable, and the responsibility should also lie with the companies. The first reason goes hand in hand with the arguments made in the 2014 SAGE Journal research article; how a number of companies claim to be sustainable and use words like “organic” to persuade consumers their purchases are environmentally friendly. The majority of the participants believed this to be a marketing strategy to increase profits. The latter reason given for the discrepancy stems from the belief that change needs to start on the production side. One participant argued manufacturers need to stop “wasting natural resources rather than asking consumers to purchase eco-apparel” (Perry 2016).

The gap between attitudes of sustainable fashion and purchasing behaviors was also identified in this study. Most of the participants had a positive attitude towards businesses who were actually committed to becoming one hundred percent sustainable, but their actions did not reflect this attitude. Reasons for this gap are that “product benefits, personal cost benefits, and emotional benefits cannot be fulfilled by purchasing Eco-Apparel” (Perry 2016). Sustainable clothing is perceived as overpriced, uncomfortable and unfashionable, and even though consumers want to help the environment, they prioritize looking nicer at a lower cost. A gap in this research study would be the small sample size of students in the same region. A way to increase the validity of this study would be to widen the sample size region in order to gather data from people of different backgrounds.

Lastly, a barrier to the mobilization of sustainable fashion is the desire for businesses to create economic growth. The fast fashion industry is known for producing a plethora of job opportunities, employing over 300 million people around the world. They contributed an estimated \$1.1 billion in revenue in 2011 and have seen a 4.78% growth rate since then (Assoune 2020). Consumers are worried sustainable development would create a downturn in the world

economy and increased unemployment as a result. This has become a rationalization for both producers and consumers to continue their support of unsustainable practices.

Data and Methodology

In addition to researching these existing case studies, I crafted a survey inquiring about knowledge and attitudes of sustainable fashion in order to add my own contribution to this field of study. I was able to gather responses from 37 participants around campus, both male and female, and ages ranging from 18-31. The questions asked in the survey were as follows: how much do you know about sustainability in the fashion industry? How often do you intentionally shop at stores that incorporate sustainability in their supply chain? Are you willing to spend a little extra money on clothing that you know has been ethically sourced? If so, how much extra are you willing to spend? What do you consider most important when purchasing clothing? If you don't already shop sustainably, how interested are you in learning more about it and changing your habits?

Results

While analyzing these results, I found that 39% of participants claimed to have “a little” knowledge of sustainable fashion and 31% claimed to have a “moderate amount” of knowledge. Another interesting aspect of this survey was 84% of participants were interested in learning more about sustainable fashion and changing their habits and 78% were willing to spend extra on ethically sourced clothing, but only 10% of respondents regularly shop sustainably. When asked what they considered most important when purchasing clothing, 56% said quality, 33% said price, and only 3% said sustainability. This was fascinating since the majority of respondents claimed to be interested in shopping sustainably, but very few actually follow through with this desire. This outcome strongly supports the earlier argument of the “social consumer.” Many people have a positive view of sustainable fashion, but this is not reflected in their purchasing habits.

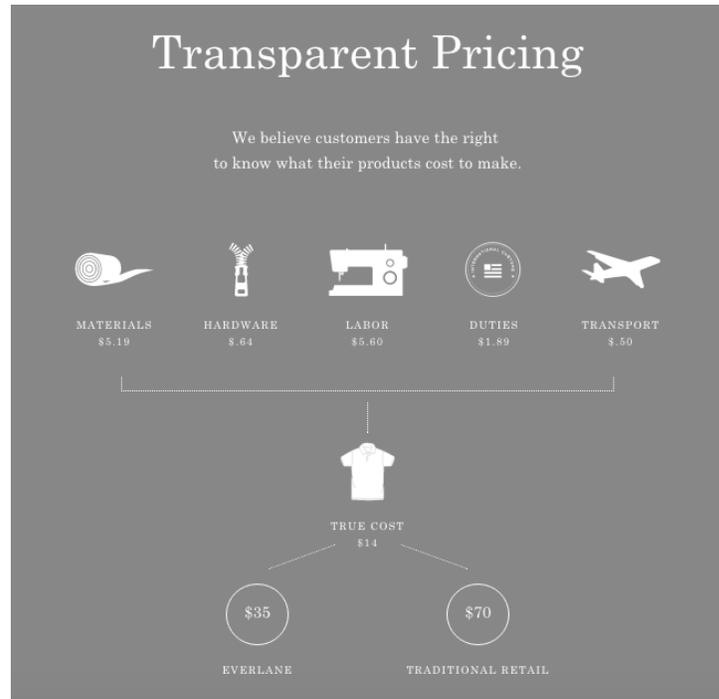
Again, we see this attitude- behavior gap within the fashion industry. In order to close this gap, consumers must truly understand the effects of fast fashion on the environment and how much of a difference sustainable practices can have on future generations. Companies also need to clearly communicate their sustainable efforts to consumers and show them that ethical clothing can still be attractive and a part of current trends

Companies Who Found Success

Everlane is a perfect example of a brand who did not sacrifice profit for sustainability and found a way to achieve both. Everlane is an American clothing retailer based in San Francisco, California that sells primarily online. Michael Preysman founded this company with the mission of selling clothing with transparent pricing. Just like any successful company, Michael “understood an unmet customer need and turned that into [his] mission to solve” (Spera 2019). Many sustainable brands have to charge a higher price on their clothing due to the increased costs of production. The issue with this is that consumers don't know how to tell if they are being ripped off or not. Everlane was able to come up with a solution to this problem which is a major contributing factor to the success of the company. They adopted the process of “radical transparency.” The infographic below is an example of what is on every product page on Everlane's website. They detail every aspect of the costs of production of that particular piece of clothing all the way from materials to transport. This allows the consumer to see the true cost of

the product along with Everlane's markup. Having this information readily available to the consumer reassures them they are purchasing high quality clothing that was ethically sourced for a fair price.

Figure 2: Pricing Structure of Everlane



This marketing strategy has worked quite well for Everlane, as they have gone from nothing to over \$100 million in revenue in just six years. Another key factor that has helped them find success is their clear focus on their mission of transparency. It is one thing to have a mission statement as a company, but it is entirely different to build your entire brand with it in mind. Many startups focus too much on producing a profit right away that they lose sight of their purpose. Everlane makes it their sole motivation to refine their supply chain process and make that very clear to their customers.

Another brand that became successful due to their transparent supply chain and marketing is Reformation. Reformation is a sustainable clothing company that caters to women who value style in addition to ethical clothing. This company wanted to become a part of the sustainable fashion industry without sacrificing the current trends. A marketing tool that really helped launch their success was their use of catchy slogans that represent who they are as a company. Some of these slogans include “Being naked is the most sustainable option- we’re #2” and “We make killer clothes that don’t kill the environment.” In other efforts to become completely transparent, Reformation posts their quarterly environmental progress reviews as well as their annual sustainability report on their home page. Customers can also find the environmental impact of their clothing on every product page. This tool, RefScale, tells consumers how much CO2, water, and waste they save by purchasing Reformation’s clothing compared to average US clothing. As mentioned in the previous case studies, one of the reasons given for the gap in environmental attitudes and sustainable purchasing behaviors was the

misconception that all sustainable fashion is unattractive and unstylish. Reformation saw this and made it their mission to produce high quality, fashionable clothes that don't hurt the environment. They also saw how terrible working conditions can be in factories across the world, so they decided to build their own factory right in downtown Los Angeles. This allows them to oversee all aspects of production to ensure the sustainability of their supply chain. In 2015, the company also introduced a resale program called Ref Recycle, where customers can "earn credit by sending them old, used garments to be recycled" (How Reformation Marketed Itself, 2019). All of these initiatives Reformation incorporated into their company have built a trust between them and their customers, allowing for brand loyalty and continued success.

Existing Government Policies

As of today, there are very few existing US government policies that regulate the fashion industry. If the fashion industry is responsible for almost 10% of global carbon emissions and the second largest polluter on the planet next to the oil industry, then why is it not treated as such? The oil and gas industry has loads of regulations, but the fashion industry seems to be overlooked by the government. According to an article written in the Journal of Fast Fashion, a reason for this is the "industry's environmental footprint is a relatively new problem" because "when the [Environmental Protection Agency] was established in 1970, the global fashion industry was far smaller than it is today" (Segran 2020). Fast fashion is a more recent sector, and it exploded when companies started trying to make their clothing as inexpensive as possible- "effectively transforming clothes into disposable objects" (Segran 2020). While there are some laws that protect garment workers, these do not necessarily apply to factories that are overseas. This also goes for the Resource Conservation and Recovery Act that was established in 1976. This act was put in place in an attempt to reduce the amount of hazardous waste being dumped into surrounding bodies of water by introducing fines and penalties. The issue with this was that companies were able to find a way around it by simply moving their factories to other countries that did not have these laws.

A government to look to that has made progress in this area is France. Brune Poirson, one of France's secretaries of state, has been declared the "unofficial minister of fashion" by the New York Times (Segran 2019). She has dedicated her role to "[preventing] fashion labels from destroying unsold merchandise" and also created a "zero-waste law" that forces companies to take a closer look into their supply chain and make crucial changes.

My Recommendation

In order for a real change to be made in the fashion industry, both producers and consumers must demand it. For consumers to have the desire for this demand, they must first be educated. Ideally, companies should utilize their marketing as a way to provide this education. Through commercials, social media, and other advertising tools, companies can inform the general public on the truths of fast fashion and how their purchasing behaviors are harming the environment. However, since the negative externalities are placed on society and the environment instead of the private sector, the companies do not have to pay the full cost. These companies can also continue to make money without the practice of education; therefore, it is efficient and necessary for the government to intervene. Another reason to justify this intervention is the fact that prevention is cheaper than mitigation later. Once consumers truly understand the harmful effects of the fashion industry, we can only hope this influences them to

switch to sustainable clothing. This shift will allow sustainable businesses to see a greater long run profit and increased success for their brand.

On the producer side, companies must fully dedicate themselves to becoming sustainable. Half effort will produce zero success. We have seen examples of companies that have one hundred percent committed to ethical business practices and have generated profit and brand loyalty as a result. These companies serve as an inspiration to those who want to become sustainable but are afraid of the risks. Everlane, Reformation, and many other brands won over customers through their transparent pricing and supply chains, and other brands can take a page out of their books and do the same. Companies need to understand that they may not see a profit immediately, but if they take a step back and look long term, they will find success. According to Underwriter Laboratories, a certification company that sets industry-wide standards for new products, companies that incorporate sustainable values into their mission and vision, “can greatly influence the public’s willingness to buy from them, invest in and work for them” (Building a Successful Brand). Companies that integrate corporate social responsibility, a type of business self-regulation aimed to support ethically oriented practices, into their core business strategies are known to be much more successful than those who do not. These initiatives have been “directly linked to top and bottom-line growth, brand differentiation, customer loyalty and employee engagement” (Building a Successful Brand). As more and more consumers start to appreciate sustainable practices, they will be more likely to buy from a company that incorporates these values into their brand. A way for businesses to ensure the sustainability of their products is to tighten their supply chain. This means pulling all factories and manufacturing within the US in order to have full oversight on the production methods. Creating a fully domestic supply chain was one of the reasons for Reformation’s success and customer loyalty, and it could do the same for other sustainable brands. The goal of this initiative is to minimize the environmental impacts of factories and to ensure the proper treatment of workers. Until all other countries have developed high ethical standards for the fashion industry that are actually enforced, manufacturing processes must remain in the US. Even though the US does not have these enforced standards either, it is more likely companies will hold themselves to higher standards if they are aware of their own practices within factories.

Finally, a policy recommendation for the government will be made in order to address the inefficiencies of the fashion industry. I believe providing incentives to businesses who can prove they are engaging in sustainable practices will encourage a nationwide shift in the fashion industry. These incentives could help businesses with either their initial startup costs or the costs necessary for transitioning into sustainability. Many companies turn away from sustainability since they do not always see short term profits. This incentive would hopefully allow these businesses to focus on the long term. Eventually, there will no longer be a need for these incentives because as consumer preferences start to evolve, companies will have no choice but to become sustainable. Additionally, if the practice of the government and companies working together to educate the general public is successful, incentives may not be necessary. This would be the most efficient policy with the greatest return, as education is cheaper than incentivization. We have seen a recent shift in the demand for ethically produced fashion, and the more this increases, the more pressure will be on companies in the fashion industry to develop ethical practices.

Conclusion

The bottom line is the fashion industry as we see it today is not efficient. While the needs of the consumer are being met with the availability of clothing at a reasonable price, our natural resources cannot support these practices for much longer. In order to ensure the safety and comfort of future generations, a change needs to be made today. Through the research studies, articles, and survey explored in this paper, it is obvious change happens when all the parts of a supply chain work together with open communication and transparency. It is also crucial for both producers and consumers to be dedicated to making a difference.

Ultimately, there is not enough consumer pressure to force all clothing brands to become one hundred percent sustainable right now. As long as people continue to support and buy from fast fashion brands, they will continue to produce their clothing, as they have done for years. There has definitely been a movement in recent years of consumers wanting sustainable practices, but it is not enough to make operating in an environmentally destructive way unprofitable for these businesses. Once the majority of the population demands ethically produced fashion, the market will follow, and companies will have no choice but to transition to sustainable practices. If these companies dedicate themselves to producing high quality, ethically sourced clothing while remaining transparent in the process, they will likely follow in the footsteps of other successful sustainable businesses. Fashion brands and retailers must work together to produce innovative solutions to these barriers of sustainable fashion. They will have to “invent, design, and test new ways to produce and sell clothes (Assoune 2016). As consumer perceptions evolve, there is hope this change is possible and the barriers can be overcome.

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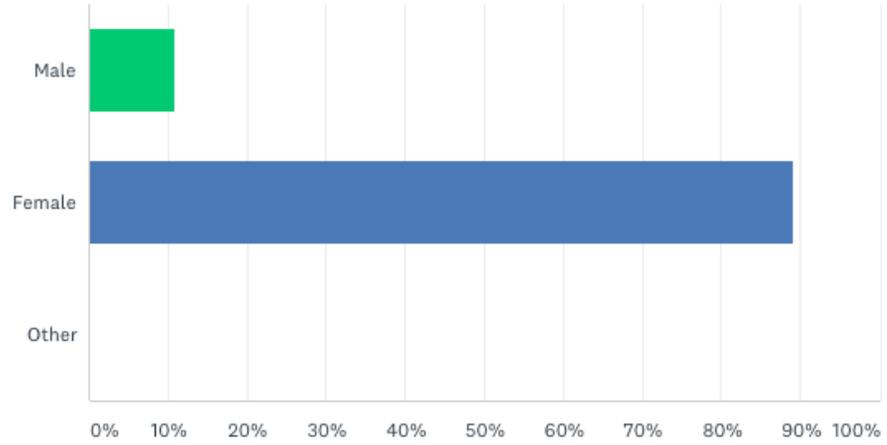
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Appendix

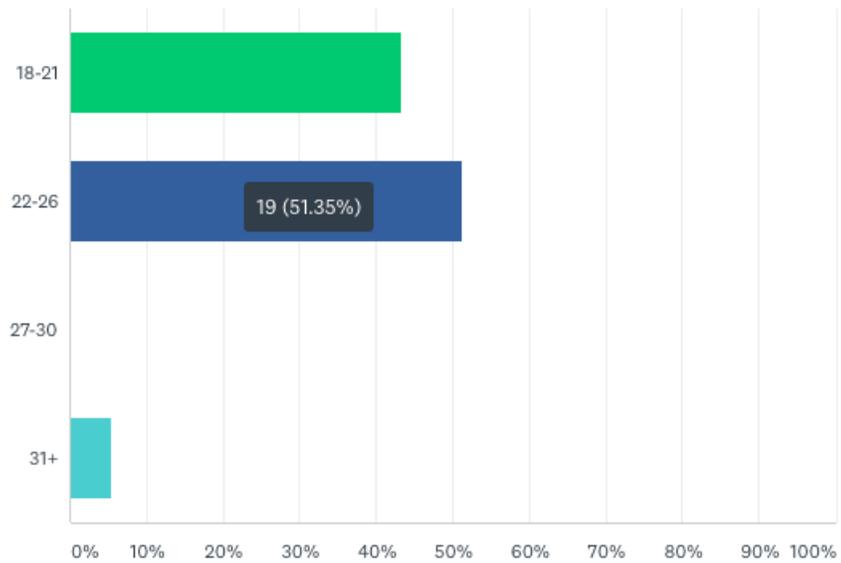
What is your gender?

Answered: 37 Skipped: 0



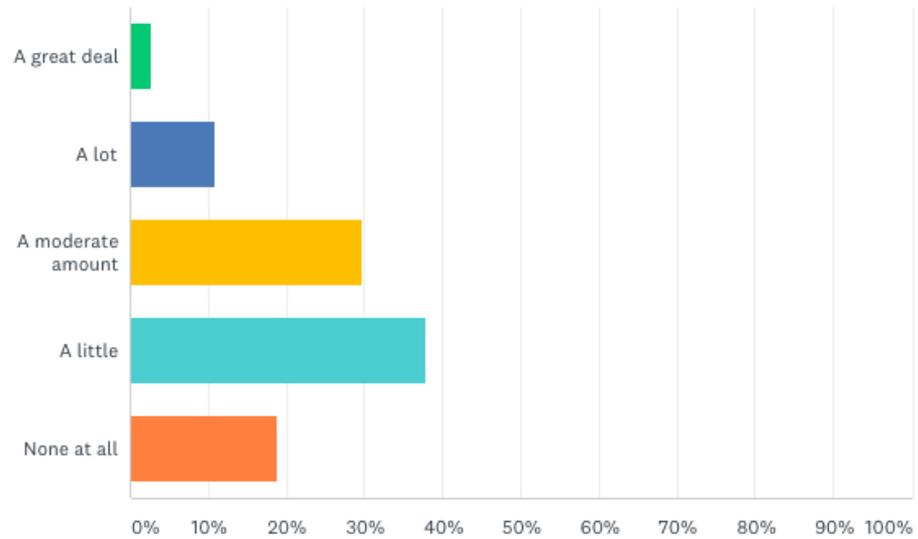
What is your age range?

Answered: 37 Skipped: 0



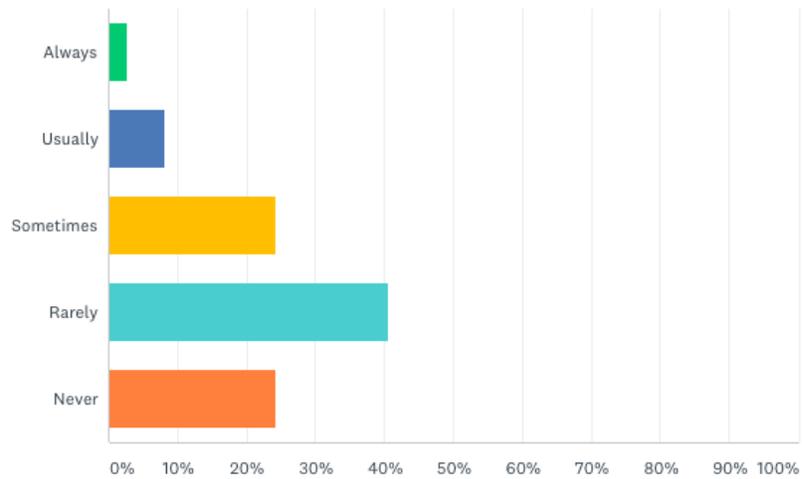
How much do you know about sustainability in the fashion industry?

Answered: 37 Skipped: 0



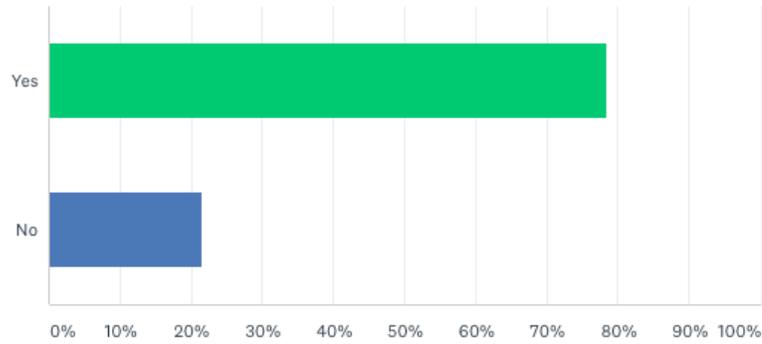
How often do you intentionally shop at stores that incorporate sustainability in their supply chain?

Answered: 37 Skipped: 0



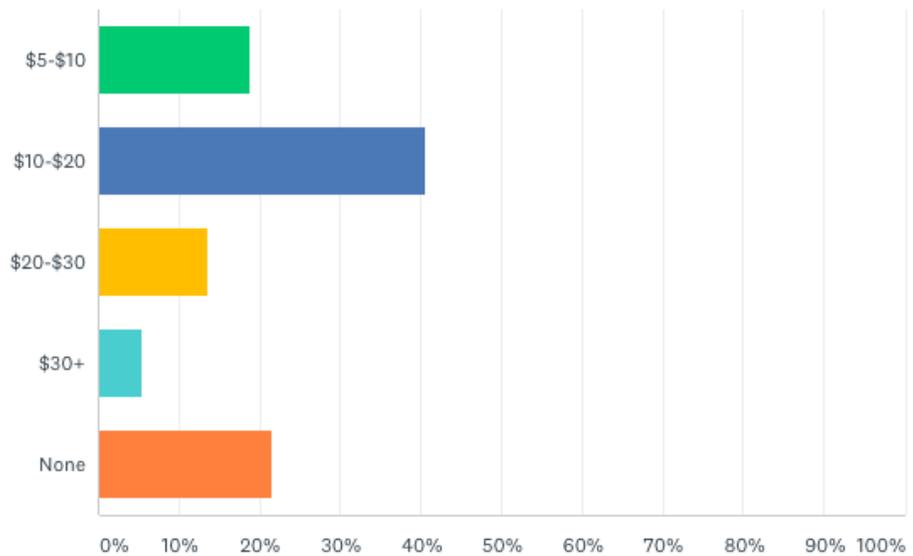
Are you willing to spend a little extra money on clothing that you know has been ethically sourced?

Answered: 37 Skipped: 0



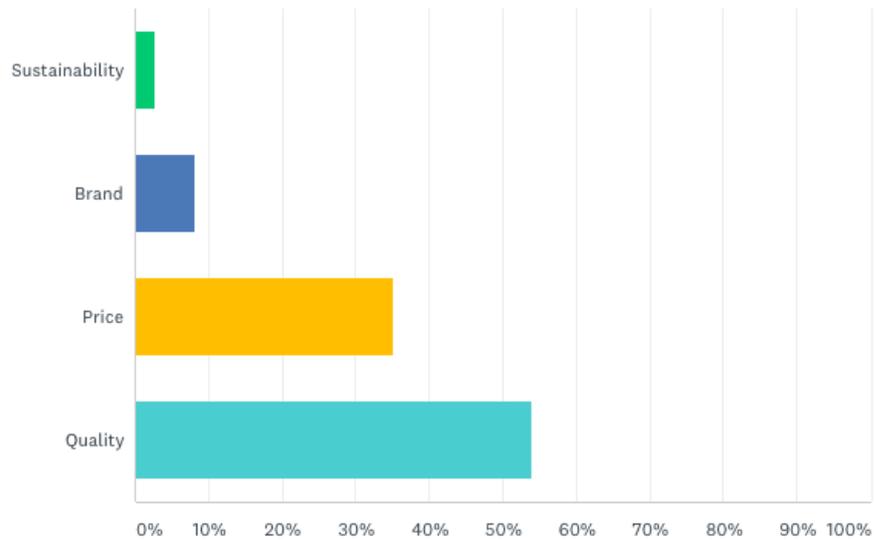
If so, how much extra are you willing to spend?

Answered: 37 Skipped: 0



Which of the following do you consider most important when purchasing clothing?

Answered: 37 Skipped: 0



If you don't already shop sustainably, how interested are you in learning more about it and changing your habits?

Answered: 37 Skipped: 0

