Master Thesis

Sustainable Customer Contribution In The Fashion Industry

A Country Comparison Between Germany, Italy And The United States Of America

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Executive Summary

Fast fashion allowed the textile industry to become one of the world's largest markets but also contributes heavily to the large waste accumulations of the sector. While only a small percentage of textiles is properly recycled, around 73 percent are disposed in landfills (Ellen Mac Arthur Foundation, 2017). Furthermore, most production processes are executed under unethical working conditions and with the usage of non-renewable or hazardous materials, lots of water and a high energy consumption (Jajpura et al., 2020; Gardetti & Torres, 2013; Roberts, 2003). Given these environmental and social obstacles, a sustainable development within the industry is required to prevent resource scarcity, the exploitation of workers and further damages to our planet. Thus, organizations must produce under eco-friendly and ethical guidelines, while customers need to adapt their purchasing behavior by lowering the consumption and an increased selection of sustainable textile products (Jung & Jin, 2016).

As it is uncertain whether customers support the change and act accordingly, the research focuses on the consumer's attitude and contribution towards sustainable fashion. For the representative sample, the United States of America, Germany and Italy are selected as these countries present important actors of the industry and possess characteristics such as high economic power, a well-developed understanding of the necessity to produce sustainable products and the ability to influence the market by setting trends on a regular basis. Despite that, the sample is limited to individuals between sixteen and thirty years, based on the statement of Goldsmith & Clarke (2009) who argue that younger generations rather purchase fast fashion instead of choosing the sustainable alternative.

Considering these aspects, the research concentrates on the question: *To what extent do American, Italian and German customers of the fashion industry accept and contribute to sustainable fashion; and how can this be supported by businesses?*

In order to receive the necessary insights, a mixed method approach is applied. Customers are questioned about their awareness level, contribution and perception on sustainable textiles through surveys, while fashion businesses express their professional viewpoint during semi-structured interviews. Both of these methods are based on a literature review and structured around the theoretical framework of the research. The core elements of the framework are represented by the product life cycle stages *(pre-)manufacturing, purchase, usage* and *post-use* and thus cover the consumer and business perspective. However, all of these stages are heavily influenced by the macro and meso environment, resulting in the product life cycle stages being aligned with the PESTEL model, the PERVAL framework (Sweeney & Soutar, 2001) and the 10R elements of sustainability (Cramer, 2017) to determine the most influential factors.

The findings reveal that majority of the customers of all three countries have a good understanding of the term 'slow fashion', are aware of several sustainable brands and seem to be concerned about the workers protection and the sustainable development of the industry. Therefore, it can be stated that the acceptance of eco-friendly and ethically produced textiles is for all three countries relatively high. Focusing on the customer's contribution, the following key aspects need to be highlighted: Germans are on average willing to spend 25 percent more

on sustainable produced items, while majority of the Italian and American consumers only tolerate a price increase of 10 percent. However, almost half of the research's population engaged in sustainable purchases in the past and thus supported the right trend. These purchase decisions are motivated by the environmental concerns and the desire to prevent the exploitation of workers and animals. In contrary, fast fashion purchases are by all three countries explained through limited availability and designs, expensive prices and the difficulty to determine sustainable textiles; resulting in the customers requesting additional advertisement, designated areas within stores and on websites, lower prices and sustainable clothing lines of larger brands. When focusing on the usage and post-use of textiles, Germans tend to have the most sustainable mindset among all participants, as they wash their clothes the least frequent and prefer recycling / repairing activities over the disposal of damaged fashion items. Considering the similarities of all contribution stages among the United States of America, Italy and Germany, it must be stressed that even though no significant differences between the countries are identified, Germans contribute the most to the sustainable movement, followed by Italian and lastly American customers.

Furthermore, the expert interviews underline that also businesses face obstacles that need to be overcome. Several experts indicate that the initial stage of creating a business is extremely challenging as it entails the search for partners who share the same values, the realization of reasonable production costs and the achievement of receiving crucial insights which is typically hampered by the missing trust and transparency within the entire value chain. Additionally, the experts argue that the industry can only then become more sustainable when all involved parties contribute equally to the change. Existing companies need to stop producing non-sustainable textile items; governments should provide further support through regulations focusing on the prevention of greenwashing activities and protection of workers, as well as initiatives that motivate businesses to operate in a sustainable manner; and customers need to adapt their purchasing behavior. Even though the last aspect mainly targets the consumers, the contribution of businesses plays an important role as it is their responsibility to increase the attractiveness of the sustainable textile industry and thus influence the customer's purchasing decision. Such influence can be obtained by awareness raising activities to not only educate about the fast fashion problematic but to also underline the true price of a product. Despite that, initiatives such as collaborations with local stores and larger businesses enable brands to bring sustainable clothing closer to the customer and providing a greater availability. Moreover, designated areas specifically for eco-friendly and ethically produced textiles could result in the industry becoming more attractive to customers as it is easier for them to differentiate between fast and slow fashion. However, the ultimate improvement is represented by a sustainable marketplace which incorporates several brands and thus offers an increased design variety.

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Chapter 1: Introduction

Chapter One focuses on the introduction of the research by providing an overview of the textile industry's current situation and by presenting the research question. Furthermore, the research objectives underline next to the academic and practical relevance why it is crucial to execute the research.

1.1 Background

The textile industry is one of the largest markets as it generates around two percent of the worlds GDP (Pensupa, 2020; WTO, 2017). Within the last fifteen years, the production has doubled (Moorhouse, 2020) and by 2030, the consumption of textile products is expected to increase by 63 percent (GFA & BCG, 2017). Such increase can be explained by factors like population growth, fashion trends or the decreasing price of textiles (Pensupa, 2020) and ultimately leads to the mass consumption of products resulting in large amounts of textile waste (Moorhouse, 2020). As of today, only one percent of textile materials is recycled after its usage, while 73 percent are disposed in landfills (Ellen Mac Arthur Foundation, 2017), and it is questionable to what extent these numbers can be increased / decreased in the future. While the waste accumulation represents already a crucial challenge, businesses are additionally pressured by the government to adopt more eco-friendly practices within the production processes (Hall et al., 2010; Nayak et al., 2020) as current operations contribute to the environmental pollution by generating greenhouse gases and through the usage of hazardous materials, as well as high energy and water consumption (Jajpura et al., 2020; Gardetti & Torres, 2013; Roberts, 2003).

Thus, sustainable fashion initiatives seem to be crucial in order to prevent even larger waste accumulations, resource scarcity and the exploitation of not only the planet but also the individuals working in the fashion industry. In comparison to fast fashion stands sustainable fashion namely for eco-friendly and ethically produced clothing.

Considering that more and more organizations tend to support and contribute to the sustainable fashion movement (Hill & Lee, 2015), these efforts can only then reach their full potential when the remaining stages of the product life cycle also adjust to the given circumstances. Organizations must be environmentally and socially conscious, while customers should rethink their purchasing decisions, lower their consumption and acquire textile products of greater and sustainable quality (Jung & Jin, 2016). Even though the customers awareness of the industry's impact on the society and the environment increases (Fletcher, 2013; Hill & Lee, 2015; Shen, 2014) and several customers being concerned about the sustainable aspects, such beliefs and perceptions "do not always translate into behavior" (Bray et al., 2011). For example, some customers might not be willing to pay a higher price for the sustainable produced products or simply want to update their wardrobe on a regular basis in regard to the current fashion trends (Morgan & Birtwistle, 2009). This is especially the case for 'street wear' items, which can best be acquired through the fast fashion industry (Islam, 2020).

1.2 Research Objectives & Research Question

Summarizing, the sustainable development in the textile industry seems to be crucial. When comparing the initiatives and efforts of both, organizations and customers, it becomes evident that the highest uncertainty in regard to sustainable practices in the field of the 'street wear' textile industry is present among the customers. Hence, the research solely focuses on the consumers perception about fashion and how the industry can be made more sustainable. Considering the inherent time limitation of this research, three countries are selected to survey a representative sample of consumers: Germany, Italy and the United States of America. Italy is chosen due to its influential role in the fashion sector, whilst Germany represents one of the most concerned countries in relation to sustainability performance, and the United States of America is one of the highest economic power nations in the world. In addition to that, the selection is based on the United States and Europe being among the top actors of the world's fashion market (OurGoodBrands, n.d.; Pensupa, 2020).

With the intention to contribute to the described situation (addressing the fast fashion problem from the consumers perspective), the research is driven by the following research question:

To what extent do American, Italian and German customers of the fashion industry accept and contribute to sustainable fashion; and how can this be supported by businesses?

Thus, the research aims to investigate the relationship between the consumer behavior and the sustainable textile industry. This includes the understanding of the consumer's awareness, acceptance and contribution towards the change in the textile industry and the challenges that businesses currently face in order to make sustainable fashion more attractive.

In order to respond to the research question in a more efficient manner, five sub-questions are defined:

SQ1. How can sustainable fashion be made more accessible and practical?
SQ2. How can sustainable practices of the fashion industry best be promoted?
SQ3. What kind of sustainable fashion recycling initiatives are mostly supported by textile industry businesses and by consumers?
SQ4. What is the customers perception of sustainable fashion?
SQ5. What changes are expected from the government in order to support the sustainable fashion movement to a larger extent?

1.3 Academic & Practical Relevance

Given the scarcity of resources, the increasing awareness of environmental concerns and the pressure on organizations to introduce more sustainable production processes, the research in hand focuses on a highly relevant topic: sustainable fashion. Highlighted is this relevance by an UNCTAD study of the year 2019 which defines the textile market, including its fast fashion trends and mass consumption, as the second most pollution industry of the world. Subsequently, the research might not only raise awareness among those who are uninformed about the current situation but might also provide useful insights to organizations who are willing to produce products in a more sustainable manner but might still be hesitant due to the uncertainty of the consumer‘s reaction and behavior.

Considering the academic relevance, several research papers have already been published in relation to the focus of this research, however, not specifically targeting the alignment of organizational and consumer initiatives. Furthermore, and to the best knowledge of the researcher, the actual acceptance in combination with the customer’s contribution is barely analyzed in prior literature, which is why it represents the main focus of this research. Moreover, the three countries were never before placed in such direct comparison, leaving the opportunity to fill an important literature gap.

1.4 Report Outline

While *Chapter One* provides a broad introduction of the textile industry’s current situation and an overview of the research focus, *Chapter Two* discusses sustainable fashion in more depth. Slow fashion will be placed in comparison to fast fashion and the most important highlights of production and consumer consumption will be addressed. As a second component, *Chapter Two* reports all elements of the theoretical research framework. *Chapter Three* focuses on the research design, explaining each of the applied methods and why the three countries Germany, Italy and the United States of America are selected. Additionally, an overview of the research’s validation, reliability and limitations is presented. While the findings are reported in *Chapter Four*, the discussion is showcased in *Chapter Five*. A final conclusion and recommendations for practitioners and future research are given in *Chapter Six*.

Chapter 2: Literature Review

Chapter Two can be divided in two sections. The first part presents important features about the textile industry, the difference between fast and slow fashion, as well as the stages that a sustainable textile item surpassed throughout its lifetime. In the second part of *Chapter Two,* the theoretical background of this research is thematized and presents in the end the research framework.

2.1 The Textile Industry

The textile industry is, as already highlighted in *section 1.1,* one of the most polluting markets of the world and it requires urgent actions of all involved parties (consumer, businesses and governmental organizations) to prevent further damages to our planet and our health. Originally the "needs for reducing the cost of production, labor, and products; an increased amount of customer expectations; globalization; technology" (ApparelMagic, 2019) set the fundament for the evolution of the fashion industry; and a plethora of organizations supported this movement through additional initiatives like the action plan of the EU, but a lot more must happen in order to support the trend of slow fashion.

2.1.1 Fast Fashion vs. Slow Fashion

Fast Fashion emerged in the middle of 1980 (Abernathy et al., 1999) and can be defined as "inexpensive apparel at a rapid pace in response to the latest style trends" (ApparelMagic, 2019). Based on these extremely flexible features and the ability of the industry to react quickly to market changes, many of the production steps are outsourced in order to produce as cheap and quick as possible (Sull & Turconi, 2008). Fast fashion is known for polluting the environment, the exploitation of workers and the accumulation of textile waste (Roberts, 2003) but it remains to be one of the most successful industries of our time.

In contrary, *slow fashion* stands for exactly the opposite as what is represented by fast fashion. Slow Fashion considers ethically produced apparel by using renewable resources and focuses on high quality products which have a longer lifetime than fast fashion textile items (Gockeln, 2014). It incorporates the responsibility for our planet, our health and the people around us to provide a better tomorrow and change the current fashion industry. Slow fashion items are typically produced locally to ensure the transparency among all parties of the supply & production chain (Gockeln, 2014) and act according to the motive of "satisfying the current needs without compromising the future generations needs" (Keeble et al., 2003).

2.1.2 The Sustainable Production & Consumption of Clothing

Circular fashion focuses on "closing the loop on fashion and textiles" (Lee, 2020) and evolves around six stages: design, manufacture, distribution, usage, collection and recycle (see Figure 1). Moving away from a linear production process with lots of residual waste, the application of circular economy principles strives for the elimination of waste generation.

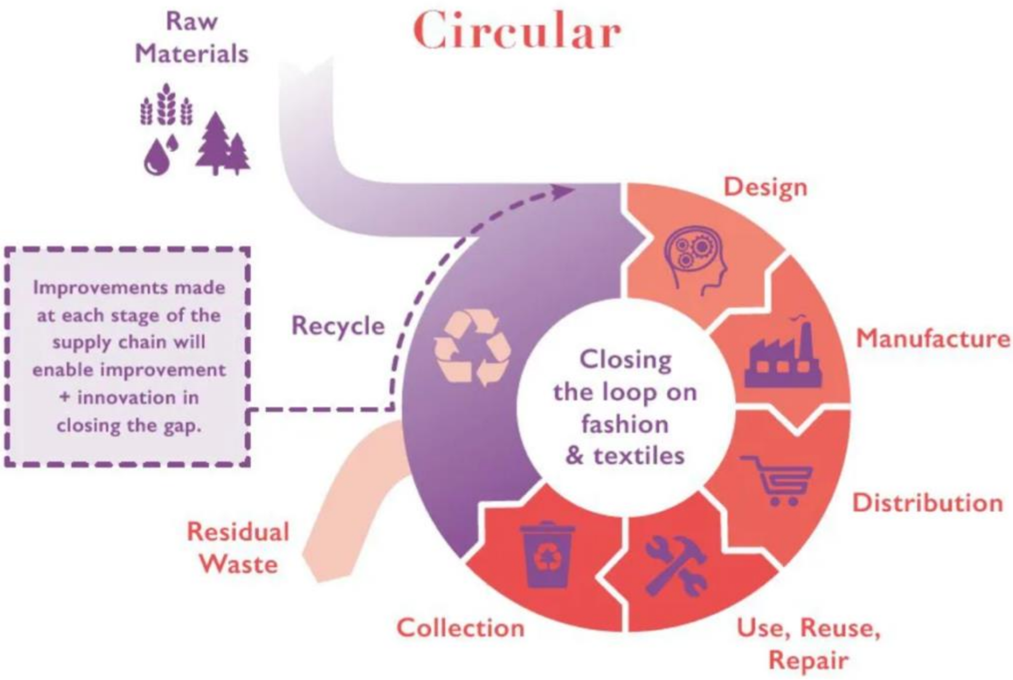

Figure 1. Model of Circular Fashion (OurGoodBrands, n.d.)

The first stage *(design)* allows the conceptualization of a product. Depending on the item's features, this initial stage might be time consuming as research needs to be executed in order to find the right partners and resources. Partners need to share the same values and the entire value chain should be highly transparent (Bose, n.d.). Before entering a partnership, every business should ensure that initial expectations and beliefs are aligned with actual events. A great example is represented by the protection of workers. Sustainable fashion assumes minimum wage, hygienic and fair working conditions and equality for all. However, many manufacturing sites of the fashion industry still make use of processes that are dangerous for the workers as they include chemical waters or other hazardous materials (Roberts, 2003). Despite that, many workers of the industry are still facing inequality, racism and wages below the minimum wage, which also represents one of the biggest issues of the industry (Bose, n.d.). Considering the selection of materials, only renewable and recyclable materials should be used for the principle of circular fashion. Natural fibers such as cotton, wool or silk are biodegradable and thus perfectly suitable for the sustainable fashion industry as they are nontoxic and help to reduce waste, as well as carbon emissions throughout the production (Nayak et al., 2020). The combination of different materials, however, can make the recycling process more challenging and should therefore be considered during the *design* stage.

As approximately 133 liters of water are used to dye one pound of textile (Hiller et al., 2012) and as around 5.5 kg of CO2 emissions are produced through the production of a single T-shirt (Goossensen, 2019), it is important that the *manufacturing* stage focuses on a green supply chain and processes that support circular economy. Plant or animal based dyes, waterless dyeing or laser finishing are great examples of how to reduce the water usage and to stop the exploitation of resources (Nayak et al., 2020). The third stage of circular fashion is represented by the *distribution*. 90 percent of all global trades are carried by ships, leading to three to four percent of human caused carbon emissions (Lee, 2020). As these numbers are expected to increase drastically until 2050 (Lee, 2020), it is important to invest in local production. Even though the production costs might be a little higher, regional manufacturing allows to minimize the transport costs as the distance between production site and fashion store is shorter. While the first three stages focus on the contribution of the business, stage four *(usage)* solely relies on the sustainable behavior of consumers. The business is thus no longer in control of the product and has to hope that the consumer acts according to the circular economy principles. Customers thus represent an important actor in the sustainable fashion industry. It is expected that customers keep textile products for quite some time and wear them on a regular basis. In case an item gets damaged, it should (in the ideal world) be repaired and reused by the consumer. Once the *usage* stage comes to an end, customer can drop off the item at any collection location of the business. The fifth stage *(collection)* typically occurs directly in the fashion store and many organizations offer in exchange a voucher or discount. After the drop off, the business can start separating the different materials and *recycle* whatever can be processed.

In case a business is not able to execute circular fashion, due to missing resources or capabilities, other recycling initiatives can provide great alternatives. Especially for smaller organization, 'renting out' textile pieces might be a lucrative business as it allows to expand the traditional audience by including consumers who would typically not buy from the particular brand (Clothesfriends, 2021). A great variety of recycling alternatives is also available for consumers. Weber et al. (2016) highlight as examples the channels of resale, donation or reuse. Some of these options might be more convenient than others, resulting in the different preferences amongst customers (Weber et al., 2016). The most important aspect is, however, that consumers are actually making use of such recycling initiatives and thus contribute to the sustainable fashion industry.

2.2 Theoretical Background

Given the scope of the research, several theories and models are combined in order to form the theoretical framework. These theories / models focus on the stages that a product surpassed throughout its lifetime, as well as the impact of external and internal factors on business decisions and consumer behavior. Since sustainability is the expected outcome of the framework, this section starts with the revision of the 'sustainability' concept, followed by the product life cycle, the PESTEL model and the perceived customer value within the decision making process of a purchase. Finally, separate elements of each theory / model are combined, resulting in the analytical framework for this research.

2.2.1 Sustainability

Given the increasing awareness of environmental concerns, the fashion industry needs to be made more sustainable. Sustainability can be defined as "(..) the development that meets the needs of the present without compromising the ability of future generations to meet their own needs." (United Nations, 1987) and integrates the three pillars *environment, society and economy* (Jawahir et al., 2006), which are also referred to as the 3P principle *people, planet, profit* or the triple bottom line. One approach of achieving such sustainable product life cycle could be represented by the application of circular economy and its 10R principle (Jawahir et al., 2006). What first started off as a 3R (reduce, reuse and recycle) approach, was later on replaced and further expanded by Cramer in 2017, resulting in a 10R framework consisting of following elements to minimize the organization's footprint: *refuse* and *reduce* the usage of raw materials, *renew* a product in the form of redesign, *reuse* those parts that can be used a second time, *repair* a product if possible and *refurbish* if required, *remanufacture* with secondhand materials, *repurpose* and give the original product or parts of it a different function, *recycle* those materials with the highest potential and *recover* materials which cannot be recycled in the form of energy (Cramer, 2017).

2.2.2 Product Life Cycle

Throughout its lifetime, a product surpasses several stages. These stages require different processes depending on the product's complexity, design, quality and purpose. However, to generalize the product life cycle, the central stages can be defined as premanufacturing, manufacturing, use and post use (Jawahir et al., 2006). Each of them is briefly described.

Premanufacturing. Materials are extracted from natural reserves and subsequently processed. Furthermore, the design for the final product is created. Since this stage involves a variety of processes, several parties jointly cooperate in order to prepare the manufacturing of the product. Material extraction and processing is typically executed by suppliers, while the design process is performed internally by the organization that produces the goods in order to maintain a competitive advantage. However, in some cases early supplier involvement can be beneficial to ensure the feasibility of the product and that the right materials are available for production (Monczka et al., 2015).

Manufacturing. During the manufacturing stage, the raw materials are transformed into actual goods. Depending on the complexity and design of the finished product, the process consists of a lower or greater quantity of practices of which some might be outsourced.

Use. After the production, the product can be acquired and used by consumers. Whether the usage will be of short or long time depends on the quality and purpose of the product. Regardless of its lifetime, products need to be maintained well and in some cases be repaired.

Post Use. Once a customer is no longer satisfied with the product, the post use stage is reached. Whether the product will be managed as waste, recycled or reused for other purposes depends on the product's materials, the customer's decision and the technological options that are available.

2.2.3 PESTEL

In order to not only establish sustainability but also to become successful and to achieve a competitive advantage in the fashion industry, businesses need to understand which external factors have an impact on the organization's performance, so the *premanufacturing* and *manufacturing* stages of the product life cycle model. This can be explored with the PESTEL model, which was developed by Francis Aguilar in 1967, to investigate the macro-environment of a business (Carruthers, 2009). Originally, the model only contained four elements: politics, economy, society and technology; but with time the core elements got extended by environmental and legal aspects in order to cover a broader scope of the external environment (Issa et al., 2010). Hence, the PESTEL model can shed some light on important external aspects that enable or diminishe the opportunities of sustainable fashion.

The *political* element mainly discusses governmental regulations such as taxes or trade restrictions (Carruthers, 2009; Issa et al., 2010). Furthermore, the political stability and global influences are considered as the majority of businesses is operating internationally (Issa et al., 2010). In spite of that, the *economical* element targets the cost related aspects of an organization (Issa et al., 2010). Thus, numbers like growth, exchange, unemployment and interest rates are analyzed (Carruthers, 2009), as well as raw material and production costs in order to determine the profitability of the business. On the contrary, the *social* element underlines the importance of consumer behavior and needs, market trends and fair working conditions, while the *technological* element covers automated processes and innovations that contribute to an increased productivity. Given the increasing awareness of sustainable practices and its benefits (Déri, 2013; Ellis et al., 2012), businesses are pressured towards a greater responsibility for sustainable development (Issa et al., 2010). The *environmental* element thus focuses on environmental issues such as the organization's footprint, including the extent of pollution and sustainable raw materials (Issa et al., 2010). Lastly, the *legal* element concentrates on ethical and privacy concerns (Issa et al., 2010), such as the health and safety of the employees or the minimum wage policy.

2.2.4 The Perceived Customer Value within the Decision Making Process

Next to the usage and post use on behalf of the customer, importance should be placed on the process of acquiring a product as a great variety of factors can influence the customer's decision.

One might purchase an item simply out of liking, while another customer only performs purchases when it is necessary and the third might decide in favor for the product based off on quality or price. These purchase intensions and influential factors need to be understood in order for organizations to achieve a competitive advantage by offering more than expected (Mcfarlane, 2013).

Sweeney and Soutar developed in 2001 the PERVAL (perceived value) framework, a consumer perceived value scale, which summarizes the most decisive factors for purchases compromised in four dimensions. According to Zeithaml (1988, p.14), such perceived value can be defined as “consumer’s overall assessment of the utility of a product (or service) based on perception of what is received and what is given.”, while the four dimensions can be described as follows:

Emotional Value. “Emotions play a part in every purchase decision” (MacKay, 1999, p.182). Depending on the satisfaction of past purchases, organizations are either rewarded with loyalty or exchanged by competitors who offer similar products. Customers who associate positive feelings with a certain product typically tend to repurchase from the same brand (Asshidin et al., 2016). On the contrary, a poor performing product will increase the chances of a customer developing negative emotions towards a brand, resulting in the purchase of products offered by the competitors.

Social Value. Sweeney and Soutar (2001) refer to the social value as “utility derived from the product’s ability to enhance social self-concept” which involves next to the improved social sense (Sener et al., 2019) also ethical aspects.

Price. The price dimension solely focuses on the monetary benefits (Sener et al., 2019), including the short and long term costs of a product (Sweeney & Soutar, 2001).

Quality. The quality dimension relates to the expected performance of the product (Sweeney & Soutar, 2001) and the advantages that are associated with such performance (Sener et al., 2019).

2.3 Research Framework

Combining these concepts and theories results in the framework showcased in Figure 2. As the research mainly targets the consumer behavior, the core elements are represented by the product life cycle stages *use* and *post use*, with the addition of a *purchase* stage to create the connection between businesses and customers. However, the *premanufacturing* and *manufacturing* stage are also essential elements of the framework as the second part of the research question concentrates on business solutions which help to increase the attractivity of the sustainable textile industry.

The internal and external factors, identified through the PESTEL analysis, focus on the performance of an organization and are thus directly linked to the stages *premanufacturing*, *manufacturing* and *post use.* On the contrary, the perceived customer value is only connected to the *purchase* stage since it strictly refers to the decisive factors of acquiring a product.

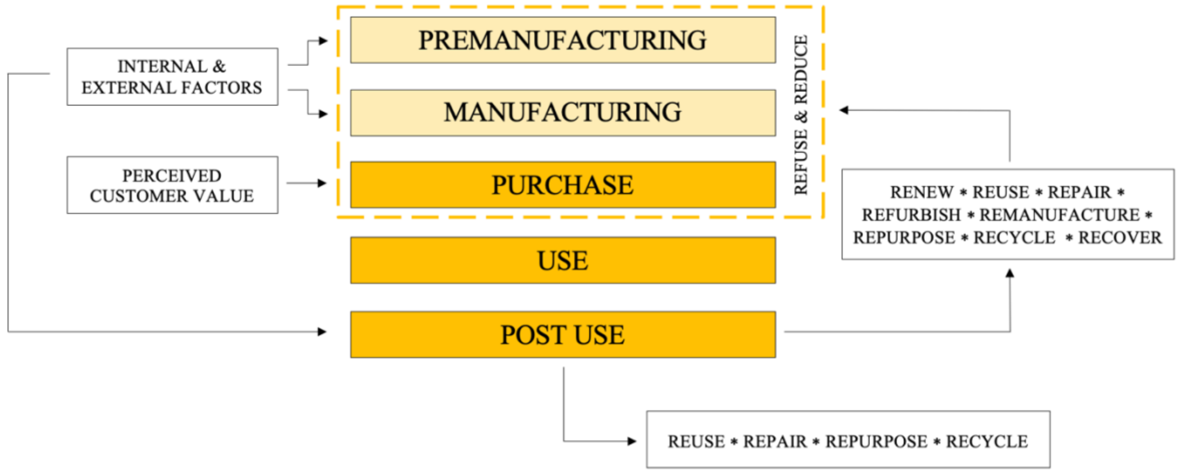

Figure 2. Theoretical Research Framework

Cramer (2017) underlines the importance of refusing and reducing the raw material usage, which is why it is incorporated as such in the *premanufacturing* and *manufacturing* stage. However, not only organizations should take these measurements into consideration; customers should also rethink their purchasing decision as most acquisitions still result from the wrong intensions. Therefore, the *purchase* stage is also linked to the variables refuse and reduce.

Considering the *post use* stage, it will be differentiated between the possible activities of customers and businesses. Depending on the product and its materials, most customers possess the ability of reusing, repairing or repurposing either the entire product or certain parts of it. In some cases, recycling will also be an option, however, this largely depends on the individual's skills and the offered opportunities to recycle by either the organization that sold the product or other parties. In contrary, an organization is able to apply a greater variety of sustainable practices. In theory, all 10R principles can be performed, however, such diversity might be limited by regulations and available sources.

Chapter 3: Research Design

Chapter Three provides an overview of the applied research methods, the sample characteristics and how the research sub-questions will be addressed throughout the findings. Despite that, ethical considerations, as well as the research's validity, reliability and limitations will be clarified.

3.1 Research Sub-Questions

As previously stated in *section 1.2.*, five sub-questions are defined in order to answer the research question in a more appropriate manner. As these sub-questions focus on different aspects and target groups, each of them requires a different research method. Table 1 showcases which methods are applied.

Table 1.

Data Collection Methods of Research Sub-Questions

Sub-Question	**Target Group**	**Research Method**	**Answered in Section**
SQ1. How can sustainable fashion be made more accessible and practical?	Customer & Businesses	Consumer Survey & Expert Interview	4.2.1
SQ2. How can sustainable practices of the fashion industry best be promoted?	Customer & Businesses	Consumer Survey & Expert Interview	4.2.1
SQ3. What kind of sustainable fashion recycling initiatives are mostly supported by textile industry businesses and the consumers?	Customer & Businesses	Consumer Survey & Expert Interview	4.2.3 & 4.4
SQ4. What is the customers perception of sustainable fashion?	Customer	Consumer Survey	4.3
SQ5. What changes are expected from the government in order to support the sustainable fashion movement to a larger extent?	Businesses	Expert Interview	4.4

3.2 Research Methods

Qualitative and quantitative research methods can provide great insights, however, when only one of both is applied, the collected data can in some cases be insufficient (Watkins, 2012). Thus, a mixed method approach is applied in order to receive the required data to try to fill the gap in the literature regarding the consumer's behavior in relation to sustainable fashion. Even though many scholars do not believe in such combination of methods (Rossman & Wilson, 1985), a mixed method approach can provide several benefits: while quantitative methods identify differences in responses, qualitative methods deepen the understanding of the situation (Watkins, 2012). Hence, combining the two research methods in one study generates a greater picture for the research (Greene, 2007; McCusker & Gunaydin, 2015), which not only leads to better results but also provides a basis for improvements (Tomal, 2010).

3.2.1 Consumer Surveys

The first selected method is a consumer survey. The survey is divided in four different sections, each focusing on a different aspect.

Section one tests the consumer's awareness level. Four statements are provided, ranging from a very broad understanding of the difference between slow and fast fashion to a very detailed information about the consumer's non-sustainable consumption consequences. As these statements become more and more detailed, they are leveled and accordingly associated to awareness level one (broad understanding) to awareness level four (deep understanding). In contrary, section two deals with the contribution of the consumer in all product life cycle stages, including the purchasing, usage and post-use stage. Section two thus investigates the general consumer behavior, but also the reasons for a non-sustainable behavior and the motivation to contribute to a more eco-friendly industry. Section three concentrates on the consumers overall perception towards sustainable fashion, while section four is meant to collect demographic data. The opening statement of the survey and the questions of each section can be found in *Appendix A* and *Appendix B*.

The survey is published in the English language and filling it takes around five to ten minutes. The consumers are not pushed into a certain sustainable or non-sustainable direction as a variety of answer options is available for selection, including the option 'prefer not to say'. Despite that, some questions allow the consumer to enter his / her own ideas, in order to extend the research scope and develop an even better understanding of the consumers perception and willingness to contribute to sustainable fashion. These individual responses can be found in *Appendix C*.

3.2.2 Expert Interviews

The second applied method is a semi-structured interview on a one-to-one basis, focusing on the business' perception of the consumer behavior and the main problems that require further improvement in order to make sustainable fashion more attractive for customers. The interview is based on the literature review and the consumer survey responses. Given the characteristics of a semi-structured interview, some questions are predefined, while others are added depending on the response of the participating expert. Including individuals with years of experience in the textile industry enables to receive a better understanding of the customer behavior and the industry's situation.

The interviews are executed in a digital form, either in the English or German language, with a total duration of around forty-five minutes. The digital feature of the interviews provides the advantage of "wide geographical access" (Opdenakker, 2006) which is especially relevant due to the previous country selection. All interview transcripts can be found in *Appendix H*.

3.3 Sample Description

Under the premise that the consumer's behavior differs depending on the social and environmental conditions of their location, the research is narrowed down from a rather broader scope to a country comparison between the United States, Germany and Italy.

This decision can be explained by various reasons: Italy is well-known to be one of the fashion capitals of the world, especially with Milan being part of the *Big Four* next to Paris, London and New York. With the numerous fashion shows, Italy is setting fashion trends every year and represents thus a prime example for a country that could raise awareness and place importance on the sustainable textile industry. Germany, on the other hand, is known to be one of the most sustainable countries of the world – ranking place ten on the Environment Performance Index (EPI) (Yale Center for Environmental Law & Policy, n.d.). Integrating Germany within the study provides insights of whether these sustainable practices and high standards are also executed and accepted in the textile industry. In contrast to that, the United States of America characterizes as the worlds largest economy with a GDP of $21.42 trillion USD (Silver, 2020) of which a high percentage is accumulated through the fashion industry. In 2017, seventeen billion fashion items were purchased in the United States of America, defining the country as the second largest in regard to consumption in the textile industry (Common Objective, n.d.). Placing Italy and Germany in comparison, the consumption was significantly lower with only 1.3 billion and 2.2 billion (Common Objective, n.d.). Known as a fast fashion and throw away culture, it is no surprise that the United States of America is the country with the most generated textile waste, according to the Global Waste Index 2019 (Sensoneo, 2021). These findings overlap with a report of the University of Washington, which indicates that 85 percent of clothing in the United States of America ends in the landfills as solid waste (Schroeder, 2019).

What all three countries have in common, however, is the development goal *responsible consumption and production* being highlighted as major challenge in all three locations (Sustainable Development Report, 2020). Given each country's characteristics, the research thus differentiates between a country that is setting fashion trends since decades, a country that places importance on its sustainable development and a country that is known for its fast fashion and the resulting mass consumption. Nonetheless, when comparing the performance of the three countries, one needs to keep in mind that the sustainability degree is not only influenced by the costumer's and businesses acceptance and willingness to contribute but also the businesses ability to receive resources from nearby and produce locally without having to outsource certain steps of the production process.

3.4 Sample Size

Even though it is known that female consumers have a greater relationship to fast fashion (Morgan & Birtwistle, 2009), all genders[1] are included in the research. However, the research population is limited to individuals between the age of sixteen and thirty since younger generations are known to focus the most on fashion trends and have a higher tendency to purchase fast fashion items (Goldsmith & Clarke, 2009). Teens younger than sixteen are excluded, as most of them are financially dependent and thus less capable of purchasing sustainable products for a higher price.

Social Media and the researchers network enabled a wide survey distribution, allowing the collection of 756 survey responses of which 685 were completely filled out. Thus, the survey distribution achieves a total response rate of 90.6 percent.[2] 253 of the consumers are from Germany, 198 from Italy and 234 from the United States of America. Considering the population of all three countries, which is showcased in Table 2, a confidence level of 95 percent and a seven percent margin of error is calculated with the help of Slovin's formula.

Table 2.

Population of Italy, Germany and the United States of America by Gender (World Population Review, 2021)

	Location		
Gender	United States	Germany	Italy
Male	34,600,000	7,099,200	4,666,100
Female	33,300,000	6,487,400	4,375,400
Total	67,900,000	13,586,600	9,041,500

Note. Population only includes individuals between sixteen and thirty years old.

Looking at each country in more detail with help of Figure 3, 71.54 percent of the German respondents are female and 28.46 percent male. Italy's consumers are to 69.70 percent female, 27.78 percent male and 1.52 percent non-binary. The rest prefers to keep their gender anonymous. With 64.96 percent respondents being female and 31.20 percent male, the male percentage of American participants is slightly higher than for Germany and Italy. 3.42 percent

[1] genders included: male, female and non-binary (individuals who do not identify as either male or female)
[2] calculated through following formula: completely filled our surveys *100 / total survey responses

Americans selected the non-binary gender and the remaining 0.43 percent wish to stay anonymous.

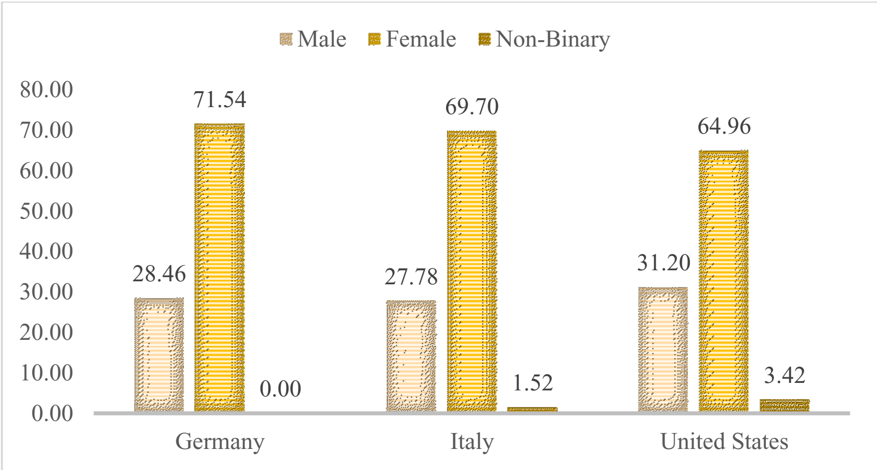

Figure 3. Demographic Characteristics: Gender Distribution of Participants

Figure 4 visualizes that the largest percentage of 16 to18 year old individuals is represented by 11.11 percent of Americans. Only 2.37 percent survey respondents from Germany and 8.08 percent of Italian respondents belong to the youngest age group. Age group two (19 to 24) and age group three (25 to 30) are both to relatively similar percentages present among the three countries.

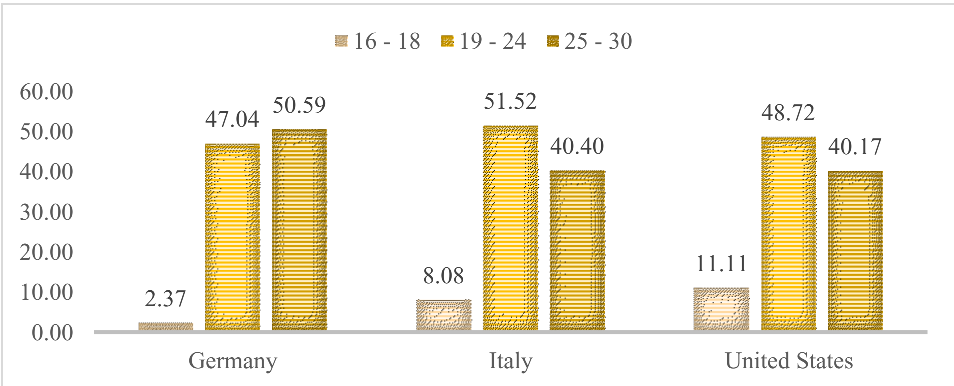

Figure 4. Demographic Characteristics: Age Distribution of Participants

As for the expert interviews, five companies volunteered to participate in the research. Germany and Italy are each represented by two experts, while only one expert is located in the United States of America. A detailed overview of the different experts, their location and function within the business can be found in *Appendix G*.

3.5 Data Analysis

The consumer surveys are collected through the platform Qualtrics and later on analyzed with SPSS to create correlations between the three countries and the answer frequencies. As for the interviews, the transcripts are investigated through the commonly used coding approach (Strauss & Corbin, 1990; Watkins, 2012) and the appropriate program ATLAS.ti in order to determine common answer patterns. Such detailed analysis is necessary, as it allowes to validate the consumer survey findings and to discover crucial elements of the expert interviews which need to be highlighted. Even though the process of transcribing and coding all interviews is quite time consuming (Strauss & Corbin, 1990; Watkins, 2012), it enables an easier connection between the different findings and the creation of a construct.

3.5.1 Ethical Consideration

Regarding the ethical consideration of the research, it should be highlighted that the participation for both research methods is voluntary and that the opportunity to withdraw from the study is possible at any time. All participants are at the beginning of each survey or interview asked to consent and it is confirmed that no personal information which allows the backtracking of individuals will be collected or published.

Appendix E and *Appendix F* visualize the consent forms of the expert interviews. Even though it was anticipated to perform the expert interviews on a one-to-one basis, some businesses requested to answer the questions in a written form which explains the main difference in the two consent forms.

Despite that, it should be underlined that the collected data is only used for the purpose of this research and that the research project was in advance registered with the BMS ethics committee of the University of Twente.

3.5.2 Research Validity

Whether the findings of the research can be defined as valid depends on their potential to properly answer the research question and in this specific case also the five sub-questions. Such validity can be increased by the input of several information sources enabled by different research methods. As discussed in *section 3.2*, a mixed method approach was applied, entailing two methods: consumer survey and expert interview. Thus, the research does not only report multiple perspectives of the textile industry but also provides the advantage of the expert opinions validating the findings received through the consumer surveys. However, one always needs to take in consideration that research participants might not respond according to their true feelings, emotions and behavior.

3.5.3 Research Reliability

Testing the research's reliability is essential as it determines the findings significance and level of accuracy. A first indicator is the margin of error. In *section 3.4* it was reported that the research has a confidence interval of 95 percent with a seven percent margin of error. This means, that the findings of the survey analysis are reliable / accurate by ± seven percent. Another method which can be used to check the reliability of the research is the comparison of the research's findings with the outcomes of previous studies and literature. As presented in *chapter five*, enough similarities are found in order to guarantee the reliability of this research.

However, there were two major errors in the data set that needed to be manually corrected. Question fourteen was not supposed to be filled out by individuals who were not aware of sustainable fashion before participating in the research. As some of them still continued to do so, responses from participants who answered with ‘disagree’ in question one had to be filtered out in question fourteen. Besides that, question sixteen was only supposed to be filled out by participants who relatively have a high sustainable mindset and who purchased a great amount of sustainable fashion items in the past. Since some participants who answered question nine with ‘maybe’ or ‘no’ also filled out question sixteen, these cases had to be removed.

3.5.4 Research Limitations

As for the research limitations it can be stated that the demographic characteristics of the survey responses represent the largest constraint. With *n* being 685, the sample size seems relatively small for a country comparison between the United States of America, Germany and Italy. However, with a margin of error of seven percent, the research provides a certain degree of accuracy (with a seven percent tolerance) and indication as to what extent consumer of the selected countries are not only aware but also contribute to sustainable fashion. Initially it was anticipated to receive a lower margin of error but under consideration of the research time frame it was not possible to receive a higher sample. Furthermore, it should be noted that two third of the respondents are female and while the age groups ‘19 to 24’ and ‘25 to 30’ are represented to an equal amount, only a small percentage of sixteen to eighteen year old individuals participated in the study. Lastly, the geographical location of the researcher limits the available research methods. Consumer observations or experiments are, for example, no option as the research targets several countries.

Chapter 4: Findings

Chapter Four presents the findings of the research. As the consumer behavior is the central concern of the study, the findings section is structured along the customer's awareness, contribution and perception towards sustainable fashion. The contribution is hereby discussed along the core elements *purchase, usage* and *post use* of the research framework. After the detailed analysis of the American, Italian and German consumer behavior, additional remarks of businesses are highlighted in the last section of *Chapter Four.*

4.1 The Consumer's Awareness Level

As awareness initiatives educate about the problematic and underline the importance of sustainable fashion, the consumer's level of awareness can be defined as a great indicator when determining the likelihood of a consumer's contribution to the sustainable textile movement. Therefore, the first section of the survey focuses on the consumer's awareness and contains four statements ranging from a rather broad to a very detailed awareness level.

Table 3 represents that majority of the participants are aware of the difference between sustainable and fast fashion items (level one). Most of these participants also agree to know several brands who offer sustainable clothing (level two), however, the consciousness seems to be slightly lower as the statistics decrease from 84.4 percent to 63.1 percent. Awareness level three focuses on the information that a single t-shirt requires 2,700 liter of water in order to be produced. This information is widely used by many organizations and businesses when promoting sustainable fashion initiatives or clothing lines. Individuals who actively follow sustainable brands should therefore be aware of this fact. On the contrary, awareness level four deals with an information which is not that widely spread, namely that only one percent of textile materials is recycled after its usage while 73 percent are disposed in landfills. Comparing the statistics of awareness level three and four in Table 3, showcases that the knowledge decreases as information become more detailed. While 35.9 percent of the participants claim to be aware in awareness level three, only 32.8 percent of the participants express their knowledge in awareness level four.

In all four levels, Germans seem to have the highest awareness, followed by the Italian and lastly by the American participants. Considering the first awareness level, the German consciousness is expressed by 92.5 percent voting for 'aware of the difference between sustainable and fast fashion', while 67.6 percent of the Germans state their knowledge of eco-friendly brands in awareness level two (see Table 3). In awareness level three, the German awareness is represented by 42.7 percent and in awareness level four with 39.5 percent (see Table 3).

Table 3.

Correlation between Awareness Within The Four Awareness Levels and Location

	Location			
Awareness Level	United States	Germany	Italy	Total
Level 1	78.2	92.5	81.3	84.4
Level 2	59.0	67.6	62.1	63.1
Level 3	29.1	42.7	35.4	35.9
Level 4	28.6	39.5	29.3	32.8

Note. All values, which are represented in percent, express the

It also emerges in all four awareness levels that females are more informed than males. Despite that, participants between 19 and 30 own a higher awareness in comparison to younger participants in the first two levels. Especially the Italian participants of the age group sixteen to eighteen and those who identify as non-binary, as well as non-binary Americans report to be unaware of sustainable fashion brands. While on average 53.5 percent males and 67.7 percent females express to know several eco-friendly brands, 62.5 percent non-binary Americans and 66.7 percent non-binary Italian claimed to be unaware (see Table 4).

Table 4.

Correlation between Awareness Level 2 and Gender

		Location			
Gender	Awareness Level 2	United States	Germany	Italy	Total
Male	Aware	52.1	59.7	47.3	53.5
	Not Aware	47.9	40.3	52.7	46.5
Female	Aware	63.2	70.7	68.8	67.7
	Not Aware	36.8	29.3	31.2	32.3
Non-Binary	Aware	37.5		33.3	36.4
	Not Aware	62.5		66.7	63.6

Note. All values are represented in percent.

Concluding, majority of the participants seem to have a broad understanding of what sustainable fashion defines. Especially the Germans appear to be relatively aware as they report the highest awareness in all four levels. However, the findings also reveal that awareness decreases as information become more in depth. Thus, consumers might understand the difference between slow and fast fashion but not necessarily the reasons as to why sustainable clothing should be preferred and what consequences can result from the purchase of fast fashion items and the related mass consumption.

These findings are confirmed by all of the experts who participate in the research. The lack of education about the fast fashion problematic reassembles, according to the experts, the main reason why the consumer's contribution in the field of sustainable fashion is still relatively low. Expert D additionally notes that past campaigns already helped to raise the awareness among the consumers, however, it was not enough and should in the future be executed to a larger extent. The first step towards engaging the customer to contribute to sustainable fashion should thus be performed through awareness raising activities in order to change the consumers mindset. Secondly, these activities should not only be executed by companies itself, but also by public and private organizations, as well as the government who should advocate conscious consumption campaigns (Expert D, see Appendix H.4.). Expert A confirms the statement of Expert D and points out that larger firms and organizations have a higher potential to reach the mass society than small businesses who are not that popular. While all these efforts and initiatives are a crucial element of the awareness development, the most important element is represented by the consumer's willingness to receive new information about the textile industry. Expert E states "Be open to basically understand the entire industry and to throw everything that you think you know about it out of the window" (see Appendix H.5.) with the additional recommendation to trust the experts when they are trying to educate the consumer's about the actual situation and problematic of the fashion industry. Moreover, Expert E highlights that raising the awareness does not necessarily have to be done through the traditional funnel, and that new opportunities like crafting workshops could help to teach consumers the real value of textiles.

4.2 How do Consumers Contribute to Sustainable Fashion?

The second section of the survey concentrates on the intended and actual sustainable contribution of consumers which directly relates to the research question. Hereby it is differentiated between the *purchasing*, *usage* and *post use* stage as one might have a more eco-friendly behavior in one of the stages over the other.

4.2.1 Consumer Behavior during the Purchasing Stage

The first contact between a consumer and a clothing piece occurs during the purchasing stage, which is thus not only the most significant / important stage but also the one with the most potential of a sustainable contribution from sides of the consumer. This is confirmed by all of the experts, as they believe that a more conscious selection and a reduced purchasing frequency are the most effective forms of contribution. Expert D further elaborates that consumers should have a more intentional purchasing pattern and only purchase clothing items that are actually needed and not just purchased due to the consumer's desire. In addition to this statement, Expert B states that consumers should rather select textiles with a timeless design, eliminating the need to purchase a new item solely because of trends changing.

When being asked how frequently one purchases fashion items, 59.9 percent of the research population states once in a while, 36.4 percent once a month and 3.8 percent once a week. Table 5 additionally showcases that Germans have the highest tendency of contributing to the mass consumption problematic of the industry as they have the highest count of participants (4.3 percent) in the category 'once a week'. On the contrary, Italian consumers seem to purchase the least amount of clothing as 64.6 percent of them vote for 'once in a while' and only 3 percent for 'once a week'.

Table 5.

Correlation between Purchase Frequency and Location

	Location			
Purchase Frequency	United States	Germany	Italy	Total
once in a while / rarely	58.1	57.7	64.6	59.9
once a month	38.0	37.9	32.3	36.4
once a week or more often	3.8	4.3	3.0	3.8

Note. All values are represented in percent.

Despite that, it should also be noted that females tend to purchase clothing more frequently while majority of the males rarely go shopping. What is especially interesting in Table 6 is that Germans of the age group '19 to 24' as well as Americans from the age group '16 to 18' and '25 to 30' seem to purchase the most. However, it also becomes noticeable that the amount of purchases per individual decreases as older the individual gets.

Table 6.

Correlation between Purchase Frequency and Age

		Location			
Age Group	Purchase Frequency	United States	Germany	Italy	Total
16 - 18	once in a while / rarely	53.8	33.3	50.0	50.0
	once a month	42.3	66.7	50.0	47.9
	once a week or more often	3.8			2.1
19 - 24	once in a while / rarely	57.9	47.9	63.7	56.1
	once a month	39.5	47.1	32.4	40.0
	once a week or more often	2.6	5.0	3.9	3.9
25 - 30	once in a while / rarely	59.6	68.0	68.8	65.6
	once a month	35.1	28.1	28.7	30.5
	once a week or more often	5.3	3.9	2.5	4.0

Note. All values are represented in percent.

Among the American and Italian consumers, these purchases are mostly made in local stores, while the internet only seems to be the secondary purchasing source. Exactly the opposite applies to Germany, as 42.4 percent vote for online and only 38.9 percent for local stores (see Table 1, Appendix D). Secondhand options are the least favorite of all countries. While American's do not really differ between secondhand companies and private sellers, there is a slight tendency towards private secondhand purchases via online platforms or flea markets from the German and Italian consumers (see Table 1, Appendix D). Also, females tend to rather consider the secondhand textile market than male individuals (see Table 2, Appendix D).

Even though the acceptance of secondhand clothing increased over the past years, Expert D mentions throughout the interview that potential reasons for the resistance towards recycled clothing can be expressed through hygienic considerations or the following of fashion trends and thus wanting to always have the newest pieces. These reasons might be especially relevant to the younger generation, however, Expert B and Expert D also state that teenagers and individuals in their early 20's seem to like secondhand clothing the most. Expert C underlines additionally the resistance due to cultural reasons, which is also confirmed by Expert A who brought up the point that the German fashion consumers contribute to a relatively large extent to secondhand fashion as there is a great variety of options is available (such as Vinted or flea markets) in comparison to other international markets. Options which are, however, only digitally available can display another resistance factor as conscious consumer might question whether the secondhand product is actually worth the efforts and costs of transport and cleaning

(Expert B, see Appendix H.2.). In contrast to that, Expert B stresses that secondhand pieces are nevertheless more energy and resource friendly, resulting in the statement that the secondhand trend should be further supported as it expands the lifetime of fashion products.

Determining how frequently clothing is purchased and through which channel represent the first measurements for understanding the consumer behavior, however, it is also crucial to identify the underlying reasons of the purchase. Thus, consumers are asked about the most important value and influential factor while making a purchasing decision.

Majority of the consumers of all three countries base their purchasing decision on the desire of wanting something new (see Table 3, Appendix D). The second most common answer among all countries is the need for a new item. While 'damaged clothes' is mentioned as an example, several consumers also mention the need based on occasions or events for which they did not have the right attire, as well as the need to purchase new clothing because old items no longer had the right fit (see Appendix C.1.). The least common answer among the countries is fashion trends. However, in the age group '16 to 18', fashion trends as an underlying value is prioritized by 33.3 percent of the German and 24.1 percent of the Italian teenager and thus replaced with the need for new clothing due to damaged and worn down clothes (see Table 7).

Table 7.

Correlation between Purchase Value and Age

		Location			
Age Group	Purchase Value	United States	Germany	Italy	Total
16 - 18	fashion trends	22.0	33.3	24.1	26.5
	damaged clothes	24.4	11.1	13.8	16.4
	desire to purchase	43.9	44.4	41.4	43.2
	other	9.8	0.0	20.7	10.2
	prefer not to say	0.0	11.1	0.0	3.7
19 - 24	fashion trends	22.1	24.3	20.2	22.2
	damaged clothes	26.6	32.7	24.4	27.9
	desire to purchase	45.7	37.1	50.6	44.5
	other	4.5	5.9	4.2	4.9
	prefer not to say	1.0	0.0	0.6	0.5
25 - 30	fashion trends	15.5	18.5	13.9	16.0
	damaged clothes	26.4	36.6	32.0	31.7
	desire to purchase	45.3	40.0	50.0	45.1
	other	12.2	3.9	4.1	6.7
	prefer not to say	0.7	1.0	0.0	0.6

Note. All values are represented in percent.

While the emotional value connected to the desire of wanting something new is also confirmed by Expert A and C, Expert B goes even a step further and defines the decision value as a combination of emotional, functional and social influences. Expert E, on the other hand, denies the findings and argues that the social value, so the trends and influence of advertisement, is more important in the eyes of consumers.

Focusing now on the most influential factor(s) of the purchasing stage, it should be noted, that even though the responses of the different age groups and genders amongst all countries vary to a great extent, the most popular factors are quality, price, trends and comfort / fit (see Table 4, Appendix D). Sustainability is among all age groups, genders and countries the least selected factor. However, this does not automatically result in a low interest in sustainable fashion, it merely implies that other factors are more crucial to the America, Italian and German consumers while making a purchasing decision.

While price and quality are indicated as the most influential factors by all experts, the interviews also reveal some other quite crucial aspects that influence the purchasing decision.

Expert B and Expert C underline the importance of social trends and brand loyalty, while Expert D additionally mentions the fit / comfort, the durability of the clothing item and the packaging appearance. Despite that, Expert A highlights that trust and transparency in the relationship between consumer and business are essential for a change in the customer's mindset. 'Awareness' is mentioned by all experts, stressing the importance of awareness raising activities to transform the consumers behavior into a more sustainable direction as it was already mentioned within *section 4.1*.

A first indication as to how interested and willing consumers are to purchase sustainable fashion can be presented by their willingness to pay a higher price in comparison to a similar item of the fast fashion industry. Majority of the participants of each country are willing to pay a price increase of 10 percent to 25 percent as can be seen in Table 8. It becomes also visible that American and Italian consumers seem to be a little bit more resistant than German consumers, as 12.8 percent Americans and 12.6 percent Italians claim to be not willing to pay more for sustainable clothing, while the same is only by 5.5 percent of the German participants confirmed (see Table 8).

Table 8.

Correlation between Willingness to Pay Price Increase *x* and Location

	Location			
Price Increase	United States	Germany	Italy	Total
0%	12.8	5.5	12.6	10.1
5%	12.4	12.6	12.1	12.4
10%	30.3	30.0	35.4	31.7
25%	22.2	33.2	26.3	27.4
50%	13.2	11.9	5.6	10.5
75%	4.3	2.8	6.6	4.4
100%	3.8	3.2	1.5	2.9
over 100%	0.9	0.8		0.6

Note. All values are represented in percent.

Same accounts for males when comparing them to the female willingness to pay a certain price for the sustainable and ethical production of clothing. A great example can be represented by 27.4 percent of American males being not willing to pay more at all, while only 6.6 percent of the female Americans confirmed the same statement (see Table 9). Among the male participants, most of the Americans (27.4 percent) state their unwillingness to pay a higher price, while 36.4 percent of the Italian participants are willing to pay a price increase of up to 10 percent and 33.3 percent of the Germans up to 25 percent (see Table 9). Table 9 also showcases that as for the highest votes of the female participants, 32.2 percent of the American and 35.5 percent of the Italian participants vote for a price increase of up to 10 percent, while 33.1 percent of the Germans are willing to even pay a price increase of 25 percent.

Table 9.

Correlation between Willingness to Pay Price Increase *x* and Gender

		Location			
Gender	Price Increase	United States	Germany	Italy	Total
Male	0%	27.4	12.5	21.8	20.5
	5%	9.6	9.7	14.5	11.0
	10%	26.0	26.4	36.4	29.0
	25%	13.7	33.3	14.5	21.0
	50%	19.2	11.1	3.6	12.0
	75%	2.7	2.8	7.3	4.0
	100%	1.4	4.2	1.8	2.5
	over 100%	0.0	0.0	0.0	0.0
Female	0%	6.6	2.8	8.7	5.7
	5%	13.8	13.8	10.9	13.0
	10%	32.2	31.5	35.5	32.9
	25%	27.0	33.1	31.9	30.8
	50%	10.5	12.2	5.8	9.8
	75%	5.3	2.8	5.8	4.5
	100%	3.9	2.8	1.4	2.8
	over 100%	0.7	1.1	0.0	0.6

Note. All values are represented in percent.

If one, however, takes a closer look at the price increase votes from 50 percent and above, it becomes noticeable that American and Italian individuals appear to be open for a price increase higher than the average. An extreme representation of such is visualized in the age group sixteen to eighteen which can be found in Table 5 of *Appendix D*.

44.7 percent of the entire sample population state that they purchased sustainable fashion items in the past and only 9.8 percent had not done so (see Table 10). The remaining 45.1 percent mention that it could be that they already purchased eco-friendly fashion items, however, these purchases were not done intentionally as they were not aware of the sustainable characteristics of the product. An interesting finding is hereby that most of the participants who vote for 'yes' are from Germany (49.8 percent), as it can be seen in Table 10.

Table 10.

Correlation between Probability of Past Purchases Being Sustainable and Location

	Location			
Sustainable Purchase	United States	Germany	Italy	Total
yes	44.0	49.8	38.9	44.7
maybe, but I was not aware	47.4	38.7	50.5	45.1
no	7.7	11.1	10.6	9.8
prefer not to say	0.9	0.4		0.4

Note. All values are represented in percent.

While majority of the participants claim to have either intentionally or accidentally purchased sustainable fashion items in the past, it becomes clear that the individuals of the age group '16 to 18' are the ones who are mostly unaware of their eco-friendly purchases. While 58.3 percent of them vote for 'maybe' and thus the unintentional purchase, only 31.3 percent base their purchasing decision on their awareness about the problematic with fast fashion items (see Table 11). Despite that, it can also be mentioned that females tend to purchase more sustainable fashion than males and non-binary individuals.

Table 11.

Correlation between Probability of Past Purchases Being Sustainable and Age

		Location			
Age Group	Sustainable Purchase	United States	Germany	Italy	Total
16 – 18	yes	38.5	16.7	25.0	31.3
	maybe, but I was not aware	53.8	66.7	62.5	58.3
	no	7.7	16.7	12.5	10.4
19 – 24	yes	47.4	45.4	43.1	45.4
	maybe, but I was not aware	44.7	44.5	46.1	45.1
	no	6.1	10.1	10.8	9.0
	prefer not to say	1.8			0.6
25 – 30	yes	41.5	55.5	36.3	46.0
	maybe, but I was not aware	48.9	32.0	53.8	43.0
	no	9.6	11.7	10.0	10.6
	prefer not to say		0.8		0.3

Note. All values are represented in percent.

In order to understand why consumers did not purchase (m)any eco-friendly clothes before and to determine how sustainable fashion can be made more accessible and practical (sub-question one), the participants are asked to name the main reasons behind their non-sustainable purchasing decision. Table 12 provides an overview and visualizes that the top three reasons for American consumers are price with 24.6 percent, difficulty of determining sustainable clothing with 22.8 percent and limited availability with 24.1 percent. 33.1 percent of the German consumers agree with the American consumers that sustainable clothing is too expensive, but limited availability is mentioned by them before the difficulty to determine. 28.4 percent of the Italian consumers complain about not enough sustainable fashion stores being nearby, while price and determination difficulty receive almost the same amounts of votes (23.3 percent and 23.9 percent). Concluding, it can be stated that the consumers of the three countries highlight all the same three reasons as major influential factors, however, not in the same order.

Four out of the five experts confirm the selection of these three factors, however, the experts also underline that price is definitely the most crucial reason why consumers tend to rather purchase fast fashion items. Individuals are raised to believe that a cheaper price is most beneficial, however, most of them do not realize that their cheap purchasing behavior will result in somebody else having to pay a high price (Expert A, see Appendix H.1.), namely the production workers who are exposed to hazardous chemicals and materials while producing fast fashion clothing. Awareness could stop the individuals from supporting the wrong trend and increase the willingness to spend more on sustainable textile products, however, it will still take some time until the required awareness is spread among enough consumers of the fashion industry (Expert A, see Appendix H.1.). This unawareness is also highlighted by Expert C, who states that many individuals are simply not aware of the fast fashion problematic due to cultural reasons. Next to that, Expert A and Expert D claim that the greenwashing of larger companies contributes to the consumers resistance of purchasing sustainable fashion as consumers question whether the clothing pieces are actually sustainable.

The design of the clothing also plays a role among the research participants but is not evaluated as that important as it only receives the votes of 13.2 percent of the participants. ‘No interest’ is the least selected reason with 5.4 percent in all countries. However, at least one individual from each countries mentions his / her doubt about whether sustainable is actually sustainable and highlights that this doubt and the ‘greenwashing’ issue with companies are impacting their purchasing behavior as well (see Appendix C.4.)

Table 12.

Correlation between Reasons of Non-Sustainable Purchase and Location

	Location			
Reasons of Non-Sustainable Purchase	United States	Germany	Italy	Total
no interest	6.7	5.4	4.0	5.4
expensive prices	24.6	33.1	23.9	27.2
non-fashionable designs	12.5	14.5	12.5	13.2
difficult to determine	22.8	19.6	23.3	21.9
limited availability	24.1	22.0	28.4	24.8
other	6.3	2.7	6.3	5.1
prefer not to say	3.1	2.7	1.7	2.5

Note. All values are represented in percent.

German males are less interested in sustainable fashion than the male individuals from the United States of America and Italy (see Table 6, Appendix D). As for the females, however, the American participants state the least interest, as 5.8 percent of them vote for the answer option ‘no interest’, while the same is only by 3.7 percent Germans and 3.8 percent Italians selected (see Table 6, Appendix D).

Among the sixteen to eighteen year old individuals, German teenagers seem to be the least interested. Table 13 also reveals that next to the difficulty to determine sustainable fashion, the non-fashionable designs are a main concern of the German and Italian teenagers, causing them to rather purchase fast fashion items. While in the age group '19 to 24', the American participants are with 9.3 participants the ones who are the least interested in eco-friendly fashion, the Germans represent again with 6.2 percent the highest party among the 25 to 30 year old individuals (see Table 13).

Table 13.

Correlation between Reasons of Non-Sustainable Purchase and Age

		Location			
Age Group	Reasons of Non-Sustainable Purchase	United States	Germany	Italy	Total
16 - 18	no interest		20.0	12.5	10.8
	expensive prices	31.6		12.5	14.7
	non-fashionable designs	10.5	40.0	25.0	25.2
	difficult to determine	10.5	40.0	37.5	29.3
	limited availability	42.1		12.5	18.2
	other	5.3			1.8
19 - 24	no interest	9.3	4.1	4.4	5.9
	expensive prices	28.0	34.2	20.0	27.4
	non-fashionable designs	11.2	17.8	15.6	14.9
	difficult to determine	19.6	17.8	23.3	20.2
	limited availability	21.5	22.6	27.8	24.0
	other	5.6	2.7	6.7	5.0
	prefer not to say	4.7	0.7	2.2	2.5
25 - 30	no interest	5.1	6.2	2.6	4.6
	expensive prices	19.4	33.1	29.5	27.3
	non-fashionable designs	14.3	10.3	7.7	10.8
	difficult to determine	28.6	20.7	21.8	23.7
	limited availability	23.5	22.1	30.8	25.5
	other	7.1	2.8	6.4	5.4
	prefer not to say	2.0	4.8	1.3	2.7

Note. All values are represented in percent.

Related to the previous question, participants are asked what factors could potentially move their purchasing decision in a more sustainable direction. The answers are presented in Table 14 and tackle the second sub-question '*How can sustainable practices of the fashion industry best be promoted?*'. The most common answer among the Germans is 'larger brands offering sustainable clothing lines' with 22.8 percent, while the American participants select 'advertisement' with 22.4 percent. Italian consumers agree with the Germans and choose with 20.9 percent also the sustainable clothing lines of larger brands. Second most voted influential factor is 'advertisement' for Germans (19 percent) and Italians (20.1 percent), while the 'influence of larger brands' is voted by 20.6 percent of the American participants. Expert A highlights that such advertisement should especially be executed by larger companies as they have the largest audience and are thus able to spread the message across the majority of consumers of the fashion industry. Secondly, Expert A mentions that advertisement through Social Media seems to be the most effective, as it reaches the consumers through daily activities. This statement is also confirmed by Expert E. Despite that, Expert D states that such marketing / advertisement campaigns should be highly transparent, as it achieves the most understanding of the current fast fashion problematic and thus has the greatest potential to change the consumers mindset.

When looking at Table 14 and especially at the third and fourth most influential factor, it becomes obvious that the consumers of all three countries have again a relatively same perception / opinion. Both 'designated areas within stores / websites' and 'lower prices' received the third and fourth vote. Interesting is that the least selected factor is 'recycling opportunities' with only 8.7 percent and it is questionable as to why consumers selected in such order.

Table 14.

Correlation between Purchase Decision Influence and Location

	Location			
Purchase Decision Influence	United States	Germany	Italy	Total
advertisement	22.4	19.0	20.1	20.5
designated area	16.4	15.1	18.4	16.6
influence of others	11.1	11.7	14.3	12.4
sustainable clothing line of larger brands	20.6	22.8	20.9	21.4
increased recycling opportunities	8.3	10.8	6.9	8.7
lower prices	16.4	18.1	15.1	16.5
other	2.2	1.8	2.5	2.2
none, due to no interest	2.4	0.5	1.4	1.4
prefer not to say	0.2	0.2	0.5	0.3

Note. All values are represented in percent.

Considering the different opinions between the genders, the male participants of all three countries prioritize advertisement, while the females of Germany, Italy and the United States of America most commonly choose the influence through larger brands offering sustainable clothing lines.

While there are no significant differences to prior findings among the older age groups, Table 15 underlines some extremes among the participants of age sixteen to eighteen. For example, only 5.4 percent of the American teenagers state to be influenced by others. Another important finding which should be highlighted is the statement of the German teenagers that sustainable clothing does not seem to be too expensive. While none of the German teenagers selects ‘lower prices’ as an influence throughout the purchasing decision, 4.2 percent Italian and even more American teenagers (16.1 percent) claim to purchase more eco-friendly clothing in the future if the prices would decrease.

Table 15.

Correlation between Purchase Decision Influence and Age

		Location			
Age Group	Purchase Decision Influence	United States	Germany	Italy	Total
16 – 18	advertisement	25.0	20.0	16.7	20.6
	designated area	19.6	10.0	16.7	15.4
	influence of others	5.4	20.0	33.3	19.6
	sustainable clothing line of larger brands	23.2	30.0	20.8	24.7
	increased recycling opportunities	7.1			2.4
	lower prices	16.1		4.2	6.8
	other	1.8		4.2	2.0
	none, due to no interest	1.8	20.0	4.2	8.7
19 – 24	advertisement	20.8	19.2	22.3	20.8
	designated area	14.6	16.5	17.1	16.1
	influence of others	13.3	11.9	15.0	13.4
	sustainable clothing line of larger brands	21.7	22.6	20.7	21.7
	increased recycling opportunities	8.3	10.7	7.3	8.8
	lower prices	15.8	17.2	13.0	15.3
	other	1.7	1.5	2.6	1.9
	none, due to no interest	3.3	0.4	1.6	1.8
	prefer not to say	0.4		0.5	0.3

25 - 30	advertisement	23.4	18.8	17.7	20.0
	designated area	17.7	14.1	20.4	17.4
	influence of others	10.0	11.2	10.2	10.5
	sustainable clothing line of larger brands	18.7	22.7	21.1	20.8
	increased recycling opportunities	8.6	11.2	7.5	9.1
	lower prices	17.2	19.5	19.7	18.8
	other	2.9	2.2	2.0	2.4
	none, due to no interest	1.4		0.7	0.7
	prefer not to say		0.4	0.7	0.4

Note. All values are represented in percent.

Despite the predefined answer options, at least one individual from each country specifies that different and more modern designs play an influential role when deciding whether the non-sustainable textile item is preferred over the eco-friendly one. Italian and German consumers additionally claim to might consider more sustainable textiles if local stores would offer such collections (see Appendix C.5.).

In contrary to the focus of the previous two questions being on the non-sustainable purchasing behavior of the consumers, the last question of this section focuses on the motivation to purchase eco-friendly fashion items. All countries vote for a combination of environmental concerns, fair working conditions and the prevention on animal exploitation (see Table 7, Appendix D). If not voted as a combination, environmental concerns receive from all countries the highest voting, followed by fair working conditions and minimum wage, and lastly the prevention of animal exploitation. Some individuals also pointed out the combination of environmental concerns and the wish to protect the workers (see Appendix C.6.), underlining that animals are of least concern. Moreover, American research participants also define the item’s quality as a motivational factor when purchasing sustainable textiles.

4.2.2 Consumer Behavior during the Usage Stage

Even though consumer could mostly contribute to the sustainable fashion by not only purchasing less but also selecting slow fashion items during the purchasing stage, it is also important to take a closer look at how clothing is handled once it is owned by an individual.

When asked how frequently the participants wash their clothes, 51.5 percent claim to wait until the item had been worn for two days. Table 16 also reveals that the answer options ‘once’ and ‘three times or more’ are each selected by around 25 percent of the participants. Moreover, the German participants seem to wash their clothes less frequently than Americans or Italian. Only 15 percent of the Germans report to wash their clothes immediately after wearing, while the same is confirmed by 30.3 percent of the American participants (see Table 16). When additionally considering the 25.3 percent of Italians who selected the first answer option, it can be concluded that Americans are the ones who wash their clothes the most and thus represent the country who contributes the least to the sustainable usage of clothes.

Table 16.

Correlation between Wearing Clothes For *x* Days Before Washing and Location

	Location			
Washing Frequency	United States	Germany	Italy	Total
once	30.3	15.0	25.3	23.2
twice	51.3	49.8	54.0	51.5
three times or more	18.4	35.2	20.7	25.3

Note. All values are represented in percent.

4.2.3 Consumer Behavior during the End of Life / Post-Use Stage

Whether a clothing piece will contribute to the large fashion waste accumulation or will be properly recycled and eventually reused for the production of new sustainable clothing seems to fully depend on the consumer's behavior during the post-use stage. Therefore, the participants of this research are asked how damaged and unwanted clothing pieces are handled by each individual in order to evaluate the consumers side of the third research sub-question *'What kind of sustainable fashion recycling initiatives are mostly supported by textile industry businesses and the consumers?'*.

In table 17, it is possible to see that 35 percent of the participants claim to repair the damages, while 33.4 percent of the participants vote for 'dispose' and 30.4 percent for 'recycle / reuse'. Even though there is a slight statistical difference within the three answer options, each of them is roughly selected by one third of the participants. While Germany (37.4 percent) and Italy (37.5 percent) seem to repair the most, recycling / reusing appears to be most common among American (34 percent) and German (31.2 percent) participants (see Table 17). However, Italy with 36 percent and the United States of America with 34.6 percent also represent the highest amount of votes for the answer option 'dispose' which leads to the conclusion that the German participants are the ones with the most sustainable mindset when it comes to handling damaged clothing pieces.

Table 17.

Correlation between Future of Damaged Clothes and Location

Future of Damaged Clothes	Location			
	United States	Germany	Italy	Total
repair	30.1	37.4	37.5	35
dispose	34.6	29.5	36.0	33.4
recycle / reuse	34.0	31.2	26.1	30.4
prefer not to say	1.2	1.9	0.4	1.2

Note. All values are represented in percent.

Interesting is also the difference of the male and female behavior, which is showcased in Table 18. While 41.1 percent of the male participants claim to simply dispose damaged clothes, only 31.2 percent female individuals confirm this statement. In contrary, 37.3 percent of the female participants state to repair damaged clothing, while only 27.7 percent - so almost 10 percent less – of the male individuals are willing to put effort into the repair. Concluding, males appear to rather dispose, while females tend to prefer repair and recycling activities. Especially the Italian males stand hereby out, as 50 percent of them claim to throw away damaged clothes instead of trying to repair them.

Table 18.

Correlation between Future of Damaged Clothes and Gender

Gender	Future of Damaged Clothes	Location			
		United States	Germany	Italy	Total
Male	repair	24.7	29.9	28.6	27.7
	dispose	40.2	33.0	50.0	41.1
	recycle	33.0	34.0	21.4	29.5
	prefer not to say	2.1	3.1		1.7
Female	repair	31.1	40.1	40.6	37.3
	dispose	33.3	28.3	31.9	31.2
	recycle	34.7	30.1	27.5	30.8
	prefer not to say	0.9	1.5		0.8

Note. All values are represented in percent.

Considering the age of the participants, the recycling of damaged clothes seems to increase as older the individuals get (see Table 8, Appendix D). While only 7.9 percent of the sixteen to eighteen year old individuals state to recycle their worn down clothes, 35.2 percent of the oldest age group '25 to 30' claim to do so. Majority of the German (83.3 percent) and Italian (81.3 percent) teenagers choose the 'dispose' answer options, and even though this also seems to be the most common answer for the American teenager, the percentual value is way lower with only 50 percent (see Table 8, Appendix D).

When asked how individuals handle their unwanted clothes, donation is the most common answer, followed by reselling the item, disposing and recycling (see Table 9, Appendix D). Germans seem hereby to be the ones who resell the most and dispose the least. Potential reasons for why American and Italian consumers are more resistance towards selling unwanted fashion items are explained by Expert D. The expert states that some individuals are simply not aware of where and how to resell their clothing or might find it easier to throw away whatever is no longer wanted. Another significant difference is noticeable when focusing on the 'return to company' statistical outcomes. Out of all the participants, Italians have the highest tendency to return unwanted clothing items to the fashion brands in exchange for a voucher / discount (see Table 9, Appendix D).

Next to the predefined answer options, some of the American research participants highlight the use of unwanted clothing for home or garden work (see Appendix C.3.). Recycling of unwanted clothing by crafting new fashion items is also addressed by one Italian respondent. Moreover, two individuals (from the United States of America and Italy) state to keep unwanted clothing for some time either caused by sentimental value towards the item or the belief that it might become interesting again.

While donations, reselling, recycling and returns to fashion companies are all great options and definitely contribute to the sustainable fashion industry in a positive manner, Expert A underlines that none of these activities will ever stop the mass consumption of fashion items if the fast fashion offerings of businesses do not decrease and the consumers do not develop a sustainable mindset.

Table 19 reveals that males and females both tend to donate the most. The second most common answer is 'dispose' with 20.5 percent for male individuals and 'sell' with 23.4 percent for females. Among the females, the American participants (45.8 percent) seem to be the ones who donate the most, while the Germans have the highest amount of votes with 29.5 percent for the reselling of clothing. The same accounts for German males, which are also the ones who donate the most as 46.6 percent of them selected the appropriate answer option. However, among all participants, the German males are the ones who return and recycle the least. Only 4.2 percent of the males located in Germany select 'return to company' and 9.3 percent the recycling option.

Table 19.

Correlation between Future of Unwanted Clothes and Gender

		Location			
Gender	Future of Unwanted Clothes	United States	Germany	Italy	Total
Male	dispose	21.0	20.3	20.2	20.5
	sell	12.1	16.1	13.5	13.9
	donate	40.3	46.6	40.4	42.4
	return to the company	5.6	4.2	6.7	5.5
	recycle	13.7	9.3	12.4	11.8
	other	7.3	0.8	5.6	4.6
	prefer not to say		2.5	1.1	1.2
Female	dispose	12.2	8.2	12.4	11.0
	sell	18.1	29.5	22.5	23.4
	donate	45.8	40.5	37.6	41.3
	return to the company	5.9	5.7	10.9	7.5
	recycle	14.4	14.2	13.6	14.1
	other	3.0	2.0	3.1	2.7
	prefer not to say	0.7			0.2

Note. All values are represented in percent.

As for the age group ’16 to 18’, the German teenagers dispose and sell the most. As each of these answer options receives 42.9 percent of the votes, the outcome is highly significant as only half as many Italian and American teenagers confirm to make use of these two activities when handling unwanted clothing items (see Table 20). Another extreme is represented by the statistical outcome of the ‘donating’ option, as 43.8 percent of the American teenagers claim to make use of it in comparison to 14.3 percent Germans and 26.1 percent Italian individuals (see Table 20). Despite that, Table 20 also showcases that Italian teenagers are the only ones who consider the option to return unwanted clothes to the brands. Among the 19 to 30 year old individuals, the most common answer was the donation of clothing. Next to that, it should also be highlighted that the 19 to 24 year old Germans dispose the least (only 7 percent) among their age group, while the 25 to 30 year old Italians are the ones who return the most with 10.3 percent.

Table 20.

Correlation between Future of Unwanted Clothes and Age

		Location			
Age Group	Future of Unwanted Clothes	United States	Germany	Italy	Total
16 - 18	dispose	20.8	42.9	21.7	28.5
	sell	20.8	42.9	26.1	29.9
	donate	43.8	14.3	26.1	28.1
	return to the company			4.3	1.4
	recycle	10.4		4.3	4.9
	other	4.2		17.4	7.2
19 - 24	dispose	14.3	7.0	14.7	12.0
	sell	15.8	30.2	19.0	21.7
	donate	44.8	38.8	39.1	40.9
	return to the company	9.4	7.0	9.8	8.7
	recycle	10.8	14.5	13.6	13.0
	other	3.9	2.1	3.8	3.3
	prefer not to say	1.0	0.4		0.5
25 - 30	dispose	13.7	14.9	13.0	13.9
	sell	16.1	21.2	20.5	19.3
	donate	42.2	46.4	39.7	42.8
	return to the company	3.1	3.6	10.3	5.7
	recycle	19.9	11.7	14.4	15.3
	other	5.0	1.4	1.4	2.6
	prefer not to say		0.9	0.7	0.5

Note. All values are represented in percent.

4.3 The Consumer's Perception of Sustainable Fashion

The last section of the survey focuses on the consumer's perception towards sustainable fashion (sub-question four) and is structured along three statements. The first statement 'I believe that the fashion industry has to become more sustainable' is confirmed by 66.9 percent of the participants, as it can be seen in Table 10 of *Appendix D*. Majority of these 66.9 percent are females, leading to the conclusion that females evaluate sustainable fashion as more important than males or non-binary individuals. Comparing the statistics of the three countries, Germans seem to be again the ones with the highest sustainable mindset, as 73.9 percent agree and only 6.3 percent disagree with statement number one (see Table 10, Appendix D).

Considering the different age groups (see Table 21), it is surprising that among the sixteen to eighteen year old individuals, the Germans are the ones who disagree the most with statement number one. In contrary, 65.4 percent of the American participants vote for 'agree' and thus represent the party with the highest sustainable mindset within the age group. Among the 19 to 30 year old individuals, the importance for sustainable fashion is mostly confirmed by German participants, while 10.8 percent Italians in the age group '19 to 24' and 9.6 percent Americans in the age group '25 to 30' disagree with statement number one and thus seem to care the least within the particular age groups.

Table 21.

Correlation between Importance of Sustainable Fashion and Age

		Location			
Age Group	Importance of Sustainable Fashion	United States	Germany	Italy	Total
16 - 18	Agree	65.4	50.0	37.5	54.2
	Neither Agree Nor Disagree	23.1	16.7	37.5	27.1
	Disagree	11.5	33.3	25.0	18.8
19 - 24	Agree	62.3	76.5	66.7	68.7
	Neither Agree Nor Disagree	28.9	21.0	22.5	24.2
	Disagree	8.8	2.5	10.8	7.2
25 - 30	Agree	56.4	72.7	70.0	66.9
	Neither Agree Nor Disagree	34.0	18.8	22.5	24.5
	Disagree	9.6	8.6	7.5	8.6

Note. All values are represented in percent.

Statement number two evaluates the importance of sustainability as a potential influential factor in comparison to the factors aesthetic and price. 41.9 percent of the responses state that none of these elements should be assessed as more important than the other. However, Table 22 also showcases that 26.9 percent of the German participants place sustainability over aesthethic and price, while the same was only by 23.5 percent Americans and 17.7 percent Italians confirmed.

Table 22.

Correlation between Importance of Aesthetic & Price > Sustainability and Location

Aesthetic & Price > Sustainability	Location			
	United States	Germany	Italy	Total
Agree	35.9	35.6	33.3	35.0
Neither Agree Nor Disagree	40.6	37.5	49.0	41.9
Disagree	23.5	26.9	17.7	23.1

Note. All values are represented in percent.

As far as gender is considered, females tend to have a more sustainable mindset than males. While 45.5 percent of the male participants assess aesthetic and price to be more important than sustainability, only 30.8 percent of the female individuals share this opinion (see Table 11, Appendix D). Despite that, it becomes again noticeable that the females from Germany prioritize sustainability much more than the female American or Italian participants. While 30.9 percent German females would rather choose a sustainable clothing item, only 24.3 percent female American and 19.6 percent female Italian agree with this selection (see Table 11, Appendix D).

Even though Germans seem in general to classify ‘sustainability’ as an important influential factor, quite the opposite is true for individuals from the age group sixteen to eighteen. 66.7 percent of the German teenagers declare price and look as most important factors and none of them would choose an item because of its eco-friendly characteristics (see Table 23). In contrary, American teenagers are much more open to sustainable clothing features as only 26.9 percent would select price and aesthetic and 42.3 percent for eco-friendly materials and production (see Table 23). Table 23 furthermore shows that the combination of the three factors appears to become more and more important as the age of the individuals increases.

Table 23.

Correlation between Importance of Aesthetic & Price > Sustainability and Age

		Location			
Age Group	Importance of Aesthetic & Price > Sustainability	United States	Germany	Italy	Total
16 - 18	Agree	26.9	66.7	56.3	41.7
	Neither Agree Nor Disagree	30.8	33.3	37.5	33.3
	Disagree	42.3		6.3	25.0
19 - 24	Agree	39.5	35.3	34.3	36.4
	Neither Agree Nor Disagree	36.8	39.5	46.1	40.6
	Disagree	23.7	25.2	19.6	23.0
25 - 30	Agree	34.0	34.4	27.5	32.5
	Neither Agree Nor Disagree	47.9	35.9	55.0	44.7
	Disagree	18.1	29.7	17.5	22.8

Note. All values are represented in percent.

The third statement 'I find it important that workers of the fashion industry are given fair working conditions and at least minimum wage' focuses on the workers protection. As it can be seen in Table 12 of *Appendix D*, 83.6 percent of the participants agree with statement number three, while only 2.5 percent disagree. Comparing the votes of the three countries, the tendency for the importance of the workers protection does not appear to differ much, however, the German participants seem again to care the most.

While this statement can be confirmed for the age groups '19 to 24' and '25 to 30', the American participants are with 80.8 percent the ones with the highest caring mindset in the age group sixteen to eighteen (see Table 24). However, 7.7 percent of the American teenagers also disagree with statement number three, while none of the German or Italian teenagers do so (see Table 24). Even further, it should be noted that females tend to be more concerned about the workers protection than male individuals.

Table 24.

Correlation between Importance of Workers Protection and Age

		Location			
Age Group	Importance of Workers Protection	United States	Germany	Italy	Total
16 - 18	Agree	80.8	50.0	62.5	70.8
	Neither Agree Nor Disagree	11.5	50.0	37.5	25.0
	Disagree	7.7			4.2
19 - 24	Agree	84.2	88.2	81.4	84.8
	Neither Agree Nor Disagree	13.2	10.1	17.6	13.4
	Disagree	2.6	1.7	1.0	1.8
25 - 30	Agree	81.9	85.2	86.3	84.4
	Neither Agree Nor Disagree	13.8	13.3	10.0	12.6
	Disagree	4.3	1.6	3.8	3.0

Note. All values are represented in percent.

4.4 Challenges & Improvement Points of Businesses in Terms of Slow Fashion

Some of the expert interview findings are already addressed throughout the previous sections of *Chapter Four* as they provided relevant additions to the understanding of the consumer behavior. The following section, however, solely focuses on those aspects that tackle the business perspective in order to evaluate the extent to which businesses can increase the attractiveness of sustainable fashion.

When asked about the most challenging part of owning a sustainable brand, three experts highlight the initial stage of creating the business. Expert A claimes that it was especially difficult to create a vision which is understood by the consumers, find business partners who share the same values and to receive the required trust and transparency within the value chain in order to guarantee the sustainable aspect of the brand. Regulations and laws do not seem to make it any easier, while the pressure of the public additionally leads to small business owners questioning whether it is possible to survive in such large industry (Expert A, see Appendix H.1.). Expert E confirms the missing trust and transparency and underlines the problematic of many large companies not paying their workers fair wages or offering them a hygienic and safe working environment. Despite that, Expert E and Expert B state that it is difficult for smaller businesses to receive the required resources as the producers typically sell in large quantities which are not feasible for small, one person organizations who just started in the fashion industry. Another common challenge is presented by the cost of production (Expert C, see Appendix H.3.). Expert B expresses that it took quite some time to find the right location for production. Production sites in the east of Europe are cheaper but do not necessarily contribute to the sustainable production of textile items. Regional production in for example Germany, however, can ensure the sustainable aspect but come with higher costs (Expert B, see Appendix H.2.). Therefore, Expert D highlights the combination of producing with a low impact, a high profit and a competitive advantage as the most crucial challenge when owning a business in the textile industry.

In hindsight of the third research sub-question *'What kind of sustainable fashion recycling initiatives are mostly supported by textile industry businesses and consumers?',* the experts reveal following information throughout the interviews: Offering vouchers / discount in exchange for unwanted old textiles is a great initiative for both, the consumer and businesses. While consumer receive the opportunity to reduce the price of their next purchase, businesses are able to recycle old materials and reuse them again for the creating of new designs. Additionally, businesses profit from the consumer's purchase by increasing their sales (Expert C & D, see Appendix H.3. & H.4.). Nonetheless, such initiative is most of the time only available to large corporations as small businesses do not have enough capacity, as they are missing the required processes, monetary funds, resources or contacts (Expert B & D, see Appendix H.2. & H.4.). Even more crucial is, however, that the recycling of old garments still creates a lot of pollution, as it needs to be properly sorted and most of the times still be combined with new materials in order to design a product (Expert E, see Appendix H.5.). Thus, the 'return / voucher' initiative does not seem to be the most ideal for the sustainable fashion industry. Expert A expresses throughout the interview the preference towards the renting initiative, however, the introduction of such is more or likely only feasible for smaller businesses as larger brands will not see the need in renting their products to the customers. The most commonly agreed on recycling initiative amongst all experts is, however, the reuse and recycle of old textile items through secondhand markets. As the initiative is not limited by any specific features and can be performed either through digital apps or local stores, Expert B underlines the advantage of the exchange between new and old garments for an affordable price with the goal to maximize the textile's lifetime to its full potential.

The last research sub-question *'What changes are expected from the government in order to support the sustainable fashion movement to a larger extent?'* is also covered during the expert interviews and it is quite interesting to see that each expert spotlights different aspects. Expert A demands additional regulations in terms of sustainable clothing to stop greenwashing activities of large businesses, dangerous production processes and the exploitation of workers. According to Expert A, non-sustainable products should be marked with a tag instead of having to advertisement the eco-friendly features and the ethical production of a product. Furthermore, it should be required for businesses to display the location from where their products are imported from. Expert B goes even a step further and requests to eliminate certain products completely, including their import and distribution around the world. Moreover, Expert B also proposes to set industry wide standards in terms of worker protection. On the contrary, Expert C expresses to be quite satisfied with the regulations of Italy and wishes that other countries would apply these as well. However, Expert C later on adds during the interview that incentives and laws specifically for consumers could increase the customer's overall engagement in the sustainable fashion industry. Expert D requests, just like Expert A, regulations to prevent greenwashing activities and called for international shared standards to measure corporate sustainability, as well as grant fiscal reliefs for companies who reach a certain sustainable standard. Lastly, Expert B and Expert E believe that government regulations can only partly contribute to a more sustainable industry and thus declare the installment of general values within the society as more important.

Lastly, all experts are asked whether they could imagine any improvement points in regard to the attractiveness of the customer's perception about sustainable fashion. Expert A and Expert D immediately underline that a price decrease, as it is requested throughout the consumer survey, is highly unlikely as sustainable fashion entails measures to guarantee a fair and ethical production with the consideration of the workers protection. Expert B completes the statement by saying that consumers should not request lower prices but rather understand why sustainable textiles are more expensive and thus learn to value the quality. Furthermore, Expert A and Expert D report that the market should include more sustainable brands to allow a greater design variety for the consumer. According to Expert A, such brands should not only be available online but also locally in shopping malls or in the streets of downtown. Expert C confirms this statement. Despite that, Expert A expresses the wish that companies should take on the responsibility of only producing sustainable clothing and thus no longer providing consumers the opportunity to purchase harming fast fashion textiles. Moreover, Expert E supports the argument of Expert A and argues that a sustainable business should not have a large variety of designs but that a collection of several smaller businesses could offer exactly this variety of different styles, colors and forms to the end consumer. In the interview, Expert E refers to it as some kind of "Amazon" for sustainable textiles.

Concluding, it can be argued that despite the given challenges and the required solutions to resolve them, quite a few improvement points are reported by the experts. Highlighted should hereby be the anticipated government regulations, the further development of recycling initiatives, the transparency towards the customer, the design variety and the increased availability of sustainable businesses both online and locally.

Chapter 5: Discussion

Chapter Five provides room for the interpretation and discussion of the previous reported findings. For the purpose of comparison, the same structure as in *Chapter Four* is applied. However, only the most significant outcomes are discussed.

Consumer Awareness.
Awareness level two focuses on the extent to which research participants could at least name two sustainable textile brands. However, male and non-binary individuals from the age group '16 to 18' present the group with the lowest awareness in that particular level. This leads to the assumption that there is either a lack of available offers or missing promotions of businesses specifically for these target groups. Furthermore, it is reported that German consumers score the highest in all four awareness levels. Based on these findings it can be assumed that German consumers do not only have a good understand of the sustainable fashion industry but also contribute to it accordingly.

Consumer Purchasing Contribution.
The first finding of the purchasing stage reveals that Germans of the age group '19 to 24' and Americans from '16 to 18' and '25 to 30' purchase the most textile items. These findings combine both the social pressure of 'going with the trends', which is mostly present amongst the youngest age group, and the increased availability of financial incentives in the older age groups. Out of all these purchases barely any are made through secondhand retail, and it is questionable as to why consumers seem to be more resistant towards recycled clothing. Further research might be necessary in order to understand the underlying reasons. Despite that, it is reported that Germans are willing to pay a higher price for sustainable textile items than American or Italian individuals. In combination with the finding that Germans also have a slightly higher tendency to actually execute sustainable purchases, the previously stated assumption *'German consumers do not only have a good understand of the sustainable fashion industry but also contribute to it accordingly'* can be confirmed for the German individuals who participated in this research. When asked about the reasons as to why past purchases are not sustainable, barely anyone selects the option 'no interest in sustainable fashion'. This indicates that the majority of the participating individuals from sixteen to thirty years old are at least to some extent interested in eco-friendly textile items. Quite surprising is the statement of the American teenagers who claim to not get influenced easily by others. As the Social Media usage increased especially in the United States of America within the last couple of years, it was expected that the American teenagers might eventual even select the 'influence through others' as the most common answer.

Post Use Contribution.
The preference of recycling initiatives seems to strongly vary among the different countries. Some rather go and dispose damaged clothing items, while others like to create own fashion pieces out of recycled textiles. Others prefer to resell unwanted fashion or rather donate still good conditioned clothing for a good cause. However, the research reveals that the imagine of

secondhand clothing needs to be shifted to not only experience sustainable consumer practices at the end of the product life cycle but also right in the beginning.

Consumer Perception.
All participants seem to find sustainable and ethical practices within the fashion industry important but when considering the responses of the different countries, German participants claim to have a slightly higher sustainable mindset than the other two nations. This distinction is possible due to the response of Germans during the second statement and their interest in sustainability outweighing aesthetics and price as influential factors and aligns with the previously confirmed assumption. It is also reported, that as older an individual becomes, the more he / she perceives that sustainability in the textile industry is important. An explanation for such phenomenon could be that with age increases the awareness and knowledge of each individual and subsequently also increases the perception in terms of sustainability in regard to textiles.

Challenges & Improvement Points of Businesses.
As it is mentioned by all experts and several other sources, the transparency seems to be the most crucial challenge within the sustainable fashion industry. It appears to be almost impossible to receive all the insights that are needed in order to run an eco-friendly and ethical businesses, which in turn might explain why fast fashion is still such a large part of the market. Especially interesting is also the remark of Expert A, that *not sustainable products should be labelled but rather those who are harming our planet and our health*. And even though it sounds so logically, it is unfortunately not yet a standard in our society as companies often have to highlight product features like 'eco-friendly packaging' or 'natural ingredients' to advertise their products.

Additional Remarks.
As it occurred several times throughout the findings that the consumer's awareness, perception and sustainable contribution increased with age, it must be assumed that the sustainable mindset depends on the age of the individual. Secondly, gender seems to play an important role in the three aspects: awareness, perception and contribution. Females tend throughout the entire study to be more conscious and engaged in sustainable initiatives. This underlines the importance for awareness raising activities especially among younger generations and male individuals to fully integrate them in the sustainable fashion movement.

Connection To Selected Theories / Models.
As far as theory concerned, a connection between the different theories, that are applied for the creation of the research framework, and the research findings is visible throughout *Chapter Four*. While the entire construct is build on the definition of sustainability, several questions of the purchasing stage align with the PERVAL framework and its four elements: emotional and social value, quality and price. An example for such can be represented by the findings clearly stating that price, quality, trend and fit / comfort are defined as the most influential purchasing decision factors, while the combination of the social and emotional value seems to be most decisive when purchasing new textile products. In contrary, the 10R model by Cramer (2017) aligns perfectly with the questions about the post use consumer behavior and most of

the PESTEL elements are thematized in *section 4.4*. Nonetheless, it must be stressed that an important ‘social’ aspect is covered by the consumer’s awareness level and willingness to purchase eco-friendly and ethically fair produced clothing, as businesses are only successful when a certain amount of sales is acquired. Thus, the entire *Chapter Four* must be reviewed in order to create an overall understanding of how the PESTEL elements influence sustainable fashion brands.

Comparison With Previous Studies.
Placing the research’s findings in comparison to previous studies allows the validation of the collected consumer responses. The following similarities can be highlighted: Cotton Council International (CCI) & Cotton Incorporated (2016) reveal that Italian and American individuals are willing to pay an increased price for sustainable clothing items of high quality. The same is confirmed by Appinio (2018) for German customers of the fashion industry, supporting the research’s findings of the consumer’s willingness to pay on average a price increase between 10 percent and 25 percent. The same sources also verify that quality, price, trends and comfort / fit are the most significant influential factors for the purchasing decision. Past studies of McKinsey (2020) and KMPG (2019) validate these findings as well. Additionally, CCI & Cotton Incorporated (2016) and KMPG (2019) state that local purchases are more common than online purchases among Italian and American customers, which aligns with the customer responses of this research. Despite that, KPMG (2019) confirms that Americans often use donations as an option to handle unwanted clothing items and that they perceive it to be quite difficult to differentiate between sustainable and fast fashion. Lastly, Splendid Research GmbH (2021) underlines the research findings of customers requesting lower prices and greater availability in order to increase sustainable fashion purchases.

Chapter 6: Conclusion & Recommendation

The research question *'To what extent do American, Italian and German customers of the fashion industry accept and contribute to sustainable fashion; and how can this be supported by businesses?'* can be divided in two separate parts, each focusing on a different perspective of the textile industry. While the first part solely concentrates on the customer behavior, the second part focuses on the challenge of how businesses can make sustainable fashion more attractive for the end consumer. Thus, *Chapter Six* provides an answer to the research question and includes recommendations for practitioners. However, *Chapter Six* also specifies aspects which are not covered by the research and could thus be targeted by future work to either expand the research focus or to test certain findings.

6.1 Consumer Acceptance & Contribution Towards Sustainable Fashion

The customer's acceptance of the sustainable fashion movement can be determined by analyzing the findings of *section 4.1* and *section 4.3*, so a combination of the customer's awareness and perception. In *section 4.1* it was reported that the participants of all countries have a relatively high awareness of the broad understanding between fast fashion and slow fashion but as the information about the textile industry becomes more detailed, the awareness of all participants decreases. German individuals represent the group with the highest awareness, while Americans are least aware of the problematic. The female individuals of all three countries tend to know more about sustainable fashion than males or non-binary individuals; and a similar phenomenon occurred during the three age groups. While the youngest participants of all countries seem to be rather less educated regarding the topic, the awareness increases as individuals become older. As for *section 4.3* it can be highlighted that the importance of the workers protection and the fashion industry needing to become more sustainable is relatively high among all participants. Moreover, sustainability seems to be an important factor for the purchase decision, however, not necessarily more important than price and aesthetic. Germans between 19 and 30 years old tend to care slightly more than American and Italian participants but the difference is not significantly high. As for the age group '16 to 18', American teenagers care more about sustainability and the workers protection, while it does not necessarily showcase to be of importance for German individuals. Concluding, it can be stated that the customer acceptance towards sustainable fashion is generally speaking high among all three countries. Nonetheless, the German individuals have a slightly higher acceptance, followed by the Italian and lastly the American participants.

Whether American, Italian and German consumers actually contribute in a positive manner to the sustainable fashion industry is evaluated with help of the three core elements *purchase, use* and *post use* of the research framework.

In regard to the *purchase* stage, German participants claim to have the highest and Italian participants the lowest tendency to contribute to the mass consumption problematic. However, when looking at the different age groups this finding is only confirmed by the 19 to 25 year old individuals, as Americans state to go relatively often shopping from the age sixteen to eighteen and 25 to 30 years old. For such purchases, all participants use mostly online and local fashion stores, resulting in only a few survey responses voting for secondhand purchasing opportunities as main purchasing source. The participants of all countries depend their purchases most commonly on the desire of wanting some new, followed by functional aspects and lastly trends. Nonetheless, in the age group '16 to 18', trends seem to be on second place for Italian and German teenagers. Popular influential factors are showcased by quality, price, trends and comfort / fit among all countries, resulting in sustainability not necessarily playing a large role. Considering the increased price of sustainable produced textile items, Germans tend to be more open to execute such purchases as majority of them vote for the willingness to pay a price increase of 25 percent, while American and Italian participants only select on average a 10 percent price increase. The consumers of the United States of America and Italy are thus more resistant towards sustainable fashion than individuals located in Germany. When actually being asked about past purchases and their level of sustainability, majority of the participants of all three countries were either totally confident or unsure about the sustainability extent of the product. Non-sustainable purchases are explained by the price limitations, the difficulty to determine eco-friendly clothing and the limited availability. All three countries confirm these factors as the top three, however, in different orders. Design is by all three countries selected as forth place. A similar phenomenon occurrs amongst the factors which possess the potential to increase the likelihood of sustainable purchases. Large brands offering sustainable clothing lines, additional advertisement, designated areas within the stores and lower prices are mentioned most commonly, however, each country follows its own order. As the last element of the *purchase* stage, the motivation behind sustainable purchases is questioned which results in the clear preference for a combination of environmental concerns, protection of workers and prevention of animal exploitation. Again, there is no significant difference among the responses of the different countries.

As for the *usage* stage it becomes evident that Americans tend to wash their clothes more frequently, while Germans represent the opposite extreme. The *post use* stage is separated between the handling of damaged clothes and unwanted items; and while the first section clearly results in German individuals having the highest sustainable mindset, the findings of the second section are rather vague. The most common answers are donation, reselling, disposing and recycling among all countries. German participants claim to resell the most and dispose the least, while Italian individuals mostly return their unwanted items to the stores. In contrary, the opportunity to donate is preferred by American participants.

Considering the extent of each sections' findings, it can be concluded that the *purchase* stage has the largest influence on the evaluation of the customer's contribution towards sustainable fashion. This finding is confirmed by the experts, who argue that consumers can contribute the most by following a sustainable mindset, involving a conscious and reduced purchasing behavior. When combining the findings of the three stages, it becomes evident that there are some but no significant differences between the customer behaviors of the three countries. Such finding is quite surprising, given that the United States of America is characterized as 'throw-away culture' and Germany being named as one of the top countries in regard to sustainability. American, Italian and German customers of the fashion industry shared most of the time similar perspectives and behaviors, no matter if the most influential purchasing factors were thematized or the handling of damaged textile items questioned. Nonetheless, the most distinct differences between the three countries should be highlighted and are thus visualized in Table 25.

Table 25.

Most significant Differences between the United States of America, Italy & Germany

	Location		
	United States	Germany	Italy
How many individuals purchase fashion items at least once a week?	3.8%	4.3%	3.0%
What is the most common purchase source?	local stores	online stores	local stores
How much more would an individual (on average) be willing to spend for a sustainable fashion item?	10%	25%	10%
How many individuals purchased sustainable clothing before?	44.0%	49.8%	38.9%
What is the most commonly chosen requirement in order to increase sustainable purchases?	advertisement	larger brands offering sustainable clothing lines	larger brands offering sustainable clothing lines
How many individuals wash their clothes after wearing them once?	30.3%	15.0%	25.3%
What is happening to damaged clothes?	recycle & dispose	recycle & repair	repair & dispose
How do the individuals handle unwanted clothing?	donations	reselling of items	returns to company

Even though the customer behavior of the United States of America, Germany and Italy does not seem to differ much, a slight tendency of the German individuals behaving a little bit more sustainable is noticeable. Especially during those times where the German and American responses represent two extremes. If one would now have to rank the countries contribution extent, regardless of the similarity of behaviors, Germany would represent the population with the most sustainable behavior, followed by Italy and lastly the United States of America. Nevertheless, the ranking does not imply that American consumers of the fashion industry only contribute in a negative manner towards sustainable fashion. Exactly the opposite is actually the case, as the findings reveal that majority of the consumers are interested in sustainable practices and already performed initiatives that support the right trend – no matter if intentionally or without being aware of it. Especially survey question fifteen, which focuses on the transformation of non-sustainable purchases, indicates the willingness of all countries to participate in the movement.

6.2 How can Sustainable Fashion be made more attractive?

The transformation of non-sustainable purchases into eco-friendly and ethically thought through purchase decisions is the place where the support of businesses plays a crucial role, as it can either guide and help to transform the customer behavior towards a more sustainable contribution or cause exactly the opposite if the consumer does not feel attracted to the new situation and supported in what he / she is doing. Indeed, businesses of the sustainable textile industry must face certain challenges like transparency issues or regulations that prevent certain initiatives, but it is still in their responsibility to make sustainable fashion as attractive as possible to the consumer in order to convince the society that fast fashion is no longer needed. As first step it is recommended to raise the awareness about the current fast fashion problematic among the entire society, but especially the young generations. Advertisement in any form can be applied but as it isd already stated throughout the findings of the expert interviews: Social Media might be the most effective form of marketing. It reaches the most important target group and does not require the consumer to perform any additional exercises when wanting to get educated about the topic, as Social Media is incorporated in everybody's daily life. The support of larger fashion businesses can, however, be beneficial as well as their large audience allows the easy distribution of spreading the awareness. Advertisement needs to be as transparent and honest as possible to ensure that the society believes the organization and does not tag it with the 'greenwashing' mark that other business might already receive.

Furthermore, fashion brands need to educate their consumers on the real price of a textile item. Only when the consumer understands the true value of a T-shirt or a pair of pants, the willingness of paying a higher price for a sustainable produced textile item will increase. Teaching the 'true value' of an item thus needs to include all the staged of the product life cycle, starting by the collection of the resources and ending with the possibilities of recycling textile waste for the creating of new designs, and cover crucial topics such as workers exploitation and environmental damages. For such project, one could take advantage of the recommendation made by Expert E, who argues that it would be interesting to organize crafting workshops in which consumers can, amongst other activities, create their own clothing piece. Moreover, business owners of sustainable textile brands should stand up for their passion and mission to change the society's purchasing behavior by visualizing to the consumers that there are already great designs and styles available on the market. Design variety might still be limited at the moment but by staying active in the industry and reassuring others that the sustainable textile market is lucrative, more creative minds might feel encouraged to create new designs and start their own sustainable textile business. The ultimate goal would be to create a "Amazon" marketplace for sustainable fashion brands, as it was referred to by Expert E, to offer a greater design variety and showcase to the consumers that sustainable fashion can indeed be attractive. However, this also requires a greater transparency within the industry to allow a production that aligns with the organization's values and the confirmation that the product is manufactured under eco-friendly and ethical guidelines.

As it will still take some time until such marketplace is developed, collaborations with local stores could be an opportunity to bring sustainable fashion closer to the consumers. While cooperations with smaller businesses might be easier to realize, sustainable brands should strive for joint projects with large and known fashion brands in order to reach a large audience and thus have a greater impact on the industry. Regardless of the organization's size that a sustainable brand cooperates with, it is highly relevant to create designated areas within the stores and on the websites, specifically for eco-friendly and ethically produced fashion. This allows an easier differentiation between sustainable products and those who belong to the fast fashion industry and helps customers to select clothing items that support the right trend.

It seems that there is a great variety of improvements required to make the sustainable fashion industry more attractive but once these points are realized, it is expected that the number of sustainable fashion purchases increases. Nonetheless, it must be understood that fast fashion remains within the industry as long as organizations choose to produce clothing under non-sustainable and unethical conditions. In order to guarantee a complete shift of the industry it is thus necessary for organizations to take on the responsibility of joining the sustainable fashion movement, while being supported by the government through additional regulations (as it was discussed in *section 4.4).* To underline the necessary changes, the previously mentioned improvement points are placed in comparison to the reasons of why customers continue to purchase non-sustainable clothing and the customer's requests in regard to an increasing attractivity of the industry. This comparison is represented in Table 26.

Table 26.

Customer Requests vs. Possible Improvements

Reasons for Non-Sustainable Purchases & Customer Requests (in order to increase sustainable purchases)	**Improvement Opportunity**
expensive prices → lower prices	no price changes customers should instead be educated about the true value of clothing (for example through crafting workshops & advertisement)
limited availability → more local offers & sustainable clothing lines of larger brands	collaborations with local stores & larger businesses
difficulty to determine sustainable fashion → designated areas within stores & websites	designates areas within stores & websites
non-fashionable designs → greater design variety	motivating others to join the sustainable fashion market cooperation amongst businesses creation of a ‘sustainable fashion’ marketplace just like Amazon
missing awareness → advertisement & influence of others	honest & transparent advertisement in any form (most effective: Social Media) support of larger brands

6.3 Future Research

Future research could, for example, focus more on aspects such as the *usage stage* of the research framework. As this particular stage was only shortly covered within the consumer survey, important elements such as the duration of owning an item or the frequency of wearing were not considered and require further research in order to evaluate the *usage stage* to its full potential. Moreover, the validity of the consumer behavior findings could be analyzed with help of experiments. This specific research method would allow to determine the difference between a consumer’s actual and intended behavior. One aspect which could for example be questioned throughout an experiment is the consumer’s willingness to pay an increased price for a sustainable produced textile item or the consumer’s preferred selection of different marketing strategies. Furthermore, future research could target the underlying reasons behind certain survey responses. It would be for example quite interesting to find out why consumers most commonly voted for the donation as an option to handle unwanted clothing items but are still resistant towards purchasing textile items from secondhand stores. Given the sample size limitations, future work should be executed under a larger scope and a greater variety amongst the genders and age groups in order to provide a more representative sample. Despite that, it would also be interesting to hear the opinion of larger fashion businesses as they have a greater audience and thus a different perspective about sustainable fashion than smaller businesses. Lastly, it is crucial to consider the reliability errors of the data collection method. Future research should therefore be executed with the help of response detecting surveys which automatically redirect the participant to certain questions depending on previously given answers. Such application would limit the errors and prevent participants from filling out questions which are not directed towards them.

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Appendices

Appendix A: Survey Opening Statement

Welcome everyone!

This research is conducted as part of a master thesis at the University of Twente, focusing on the sustainable contribution of customers in the fashion industry. Throughout the survey you will be asked questions about your purchasing behavior, your awareness about the current situation of the industry and your perception of sustainable fashion.

Please note that you can only participate in the study when you fulfill the following criteria:

- You are between 16 and 30 years old.
- You live in Germany, Italy or the United States of America.

Participating in this research will take about 5 minutes. Data provided by you will be held confidential and only be accessible to the researcher and the associated supervisor. Despite that, the data will only be used for the purpose of this research and deleted when no longer needed. You have the right to withdraw from the study at any time, resulting in your data not contributing to the final research results. In case of questions, concerns or requests please contact me via j.habermann@student.utwente.nl.

In order to begin with the survey please click 'Confirm'. Please note that by clicking the button below you are confirming that you are above 16, have read the above stated information and are participating voluntarily.

Appendix B: Survey Questions

Awareness (Section One)

Please indicate whether you are aware of the following facts.

Q1: I am aware of the difference between sustainable and fast fashion items.
- Agree
- Disagree

In case you answered the first question with 'disagree', fast fashion represents inexpensive apparel which is produced for mass-consumption and in regards to the constantly changing fashion trends. The term sustainable fashion, on the other hand, focuses on environmental friendly production and ethical guidelines.

Q2: I know several fashion brands who offer environmental friendly clothing.
- Agree
- Disagree

Q3: A single T-shirt requires 2,700 Liter of water in order to be produced.
- I am aware of this.
- I am not aware of this.

Q4: Only 1% of textile materials is recycled after its usage while 73% are disposed in landfills.
- I am aware of this.
- I am not aware of this.

Contribution (Section Two)

Q5: How frequently do you purchase fashion items?
- once in a while / rarely
- once a month
- once a week (or more often)

Q6: What are your main purchase sources?
- fashion stores (online)
- fashion stores (on site / local)
- second hand (private seller)
- second hand (company)

Q7: What are the determinant factors for your purchase?
- fashion trends
- worn down / damaged clothes
- desire to purchase something new
- other
- prefer not to say

Q8: What influences your purchase decision the most?
- sustainability
- price
- comfort
- quality
- familiar brand
- trends / looks
- other
- prefer not to say

Q9: How much more would you be willing to pay for sustainable fashion items?
- nothing
- 5%
- 10%
- 25%
- 50%
- 75%
- 100%
- over 100%

Q10: Have you purchased sustainable fashion items before?
- yes
- maybe, but I was not aware of it
- no
- prefer not to say

Q11: How often do you wear your clothes before you wash them?
- once
- twice
- three times or more

Q12: What do you do with items that are damaged?
- repair them
- throw them away
- recycle them / reuse them for other purposes
- prefer not to say

Q13: What do you do with items that you no longer want to wear?
- throw them away
- sell them (online, flea markets, ..)
- donate them
- return them to the company (example: H&M recycling opportunity)
- recycle them / reuse them for other purposes
- other
- prefer not to say

If you are someone who has not purchased (m)any sustainable fashion items .. (Please only fill out if applicable)

Q14: What are the main reasons for your purchase decision? (Please skip this question if you were not aware of sustainable fashion)

- I am not interested in sustainable fashion.
- Sustainable fashion is too expensive.
- Sustainable fashion is not fashionable.
- It takes too long to determine sustainable fashion.
- Sustainable fashion is not available in the stores nearby.
- other
- prefer not to say

Q15: Which factors could potentially influence your purchase decision / behavior?

- more advertisement / information about sustainable fashion
- designated areas within the stores / on the website for sustainable fashion
- the influence of others (family, friends, ..)
- larger brands offering sustainable clothing lines
- increased amount of recycling possibilities
- lower prices
- other
- none, since I will not buy sustainable fashion
- prefer not to say

If you are someone with a relatively sustainable mindset .. (Please only fill out if applicable)

Q16: What is your motivation to purchase environmental friendly fashion products?

- improvement oft he environment / climate change
- fair wages and better working conditions for workers of the fashion industry
- to stop the exploitation of animals
- all of the above
- no specific reasons
- other

Perception (Section Three)

Q17: I believe that the fashion industry has to become more sustainable.

- Agree
- Neither Agree Nor Disagree
- Disagree

Q18: Factors like aesthetic or price are more important than the fashion item being sustainable.

- Agree
- Neither Agree Nor Disagree
- Disagree

Q19: I find it important that workers of the fashion industry are given fair working conditions and at least minimum wage.

- Agree
- Neither Agree Nor Disagree
- Disagree

Demographics (Section Four)

Q20: Gender

- male
- female
- non-binary / third gender
- prefer not to say

Q21: Age

- 16 – 18
- 19 – 24
- 25 – 30

Q22: Location

- United States of America
- Germany
- Italy

Appendix C: Additional Consumer Survey Responses

C.1. What are the determinant factors for your purchase?

United States:
Sometimes I buy clothes because I saw them on Instagram before. / personal interest / event, wedding, vacation, etc. / event / if I like the clothing / for events / through window shopping and the influence if my friends and family / If I need it, I usually like to get second hand clothing or clothing produced from recycled materials. / When I am walking through the city and see something that I like. / events like weddings / If I see something that I like that I've wanted for a while and it is cheap, then I'll buy it. / special occasions / something with my unique but odd sense of style / items that fit my body type / need new clothes that fit properly / building wardrobe / I grew out of all my clothes and am developing a new style. / fill a gap in the wardrobe / events / occasions / recommendation / special occasion / growing out of clothes / necessities, apparel I need / When I see something I like. / expand wardrobe / It's an item I've been wanting and finally found a good time to buy it.

Italy:
seeing it on social media / occasions / shopping with friends and family / I need something that I don't have. / if my favorite store has new items and I like them / special occasions / I usually go for a single item I need and end up with a full bad of things I want. / being in need of something new (worn down clothes or other occasions) / seeing nice clothes via advertisement on social media / recommendations from friends or seeing clothing on them and liking it / special occasions or when old clothes do not fit anymore / other people wearing the clothing that I want to buy / when I outgrow my current wardrobe / mood / when I need something for an event / when my old clothes no longer fit me

Germany:
needed usability / I work in Zara, I have discount and it is easy to buy clothes from them. / "emotional pflaster" / desire to look fabulous, find my style / looks / occasions that require new clothing (i.e. office job, a wedding) / need something for an occasion / tempting advertisement / when old clothes are broken / having variety styles / special occasions / significant personal characteristics

C.2. What influences your purchase decision the most?

United States:
sustainability and price / price, quality, look, sustainability (not in a specific order), my particular style that is hard to find / I only purchase second hand items with a few exceptions like underwear.

Italy:
quality for a fair price / how it fits my body / push from girlfriend / fit & design / a combination of previous / how it makes me feel

Germany:
need to represent / how long I will most likely wear and like it / price, special offers / discounts or sales

C.3. What do you do with items that you no longer want to wear?

United States:
Some of my clothes I also give to my cousins so they can still wear them or I give my clothes to Goodwill. / ask my friends and otherwise I throw them away / wear them at home or for garden work / friends / Some items I keep, especially if I might be the right size to wear them again or if I have sentimental value attributed to them I put them in storage. / friends and family / Use for other purposes such as wiping down car or cleaning something dirty or oily. / friends & family / give to my little brother / passing down to younger family members / use them for garden work or for wearing inside the house / pass them on to my brother or cousins / give to younger siblings / give to family members / give to others / Sometimes I'll hand them to my little cousin. / give them to friends & family / hand them down to younger siblings

Italy:
I keep them. / my brother gets them / use to material for self-made clothes / give them to friends & family / hand-me-down for my brother / My mom takes care of it. / I do not know my mother takes the clothes. / Depending on the condition I sometimes throw it away or give it to other family members. / sometimes I give it to family members / Magic's them to wanting family and friends / I put in the back of the wardrobe hoping I will like them in some future. / give them to my sisters / give to friends & family

Germany:
Usually putting them into the entrance of our building block where always someone else is happy to pick them up. / give to family and friends / give it to friends (in case they want it) / donate but not in the donation containers but instead directly to the secondhand stores / give it to friends & family / give it to younger siblings or people in need / give them to family members if they are still in good condition but I personally just didn't like the look of it anymore

C.4. What are the main reasons for your purchase decision?

United States:
Sustainable fashion is only available in some stores so the variety is limited. / It's hard to find sustainable companies that fit my style. / Is it legit? / not sure if the items are really sustainable / I believe fashion can never be sustainable, the only way to minimize our fashion carbon footprint is to buy less. / Haven't really ever sought it out. / there is a lot of greenwashing so I prefer to buy secondhand / usually given clothes / It depends if its what I wear. / never took it into account / I like to shop quick and easy.

Italy:
Sometimes it takes too much effort to find a reliable sustainable retailer nearby. So I just go and buy whatever I need. / never really paid attention to the tag / Sustainable clothing is

sometimes very basic and so it is difficult to purchase clothes where a print is on which is out of sustainable material. / Are "sustainable" clothes really sustainable? / I often don't like the look and the colour. / only certain places offer it / It is actually difficult without researching to know if a new item is sustainable or just green wash of the company. / I'm not sure if the so called "sustainable fashion" is really sustainable.

Germany:
I think it's the same in the end. / I don't believe they are actually sustainable. / often don't have a good fit / In marketing campaign, brand, or product tags there is less clear information about how sustainable that piece of clothes is. For example: Is that piece of clothes sustainable in fabric? How much water do they reduce? Do they use organic fabric? Where does all the fabric come from? Do they use slave labour in producing that clothes? / It is sometimes hard to figure out whether the company is in fact producing sustainable clothing or rather just green washing their products. / greenwashing of the companies

C.5. What factors could potentially influence your purchase decision / behavior?

United States:
Sustainable clothing is often only basic. If the stores would have more options and different designs I think I would buy sustainable clothing more often. / If it would be more fashionable and have better designs. / better designs and clothes that go with the trend / Knowing that sustainable also means durable. I want to buy an item for long-term (buy it for life) use. / higher income / attractive sustainable fashion maybe not what is offered from main stream brands, something more niche, a brand with a purpose behind its sustainable clothing items / It fits my style, and more diversity in genre of clothing (punk, boho, edgy, goth, etc.) not only just what is trending. / availability of my favorite styles / style and aesthetics / I think sustainable brands need to go mainstream to make a difference to be honest. / not being a large brand, you can't be large and sustainable

Italy:
more variety / different styles / more options / fashionable clothes / different designs / better designs / more transparent label / presence of sustainable fashion shops near where I live / fashionable sustainable clothing

Germany:
style / designs that aren't ugly / availability of sustainable clothes in stores nearby / better fit, modern designs / local stores, I need to try clothes on (don't want to ship them back and forth) / owning more money / more and clear information / small small businesses who take more care than large, solely profit motivated companies corporations / more transparency about the ethics of the company

C.6. What is your motivation to purchase environmental friendly fashion products?

United States:

the first two / the first and second answer / Option 1 & 2 / to reduce waste and excessive consumerism, which benefits everyone / When I shop eco clothing I feel better, I know that I did something good for the environment but I also receive good quality items, so I guess answer option 1 and quality? / all of the above and I feel like the quality is better than the quality of fast fashion items

Germany:

improvement, as well as fair wages but not exploitation of animals / The first two, I do not care about animals.

Appendix D: Additional Survey Statistics

Table 1.

Correlation between Purchase Source and Location

	Location			
Purchase Source	United States	Germany	Italy	Total
online stores	34.3	42.4	28.0	34.9
local stores	44.7	38.9	52.1	45.2
second hand (private)	10.4	11.5	11.6	11.2
second hand (company)	10.6	7.2	8.2	8.7

Note. All values are represented in percent.

Table 2.

Correlation between Purchase Source and Gender

		Location			
Gender	Purchase Source	United States	Germany	Italy	Total
Male	online stores	28.7	43.4	28.6	33.6
	local stores	53.7	42.4	59.5	51.9
	second hand (private)	8.3	8.1	8.3	8.2
	second hand (company)	9.3	6.1	3.6	6.3
Female	online stores	37.4	42.0	27.7	35.7
	local stores	42.0	37.6	49.6	43.1
	second hand (private)	10.3	12.8	12.6	11.9
	second hand (company)	10.3	7.7	10.1	9.4

Note. All values are represented in percent.

Table 3.

Correlation between Purchase Value and Location

	Location			
Purchase Value	United States	Germany	Italy	Total
fashion trends	19.6	21.6	18.2	19.8
damaged clothes	26.3	34.1	26.3	28.9
desire to purchase	45.4	38.7	49.5	44.5
other	8.0	4.8	5.6	6.1
prefer not to say	0.8	0.7	0.3	0.6

Note. All values are represented in percent.

Table 4.

Correlation between Purchase Factors and Location

	Location			
Purchase Factor	United States	Germany	Italy	Total
sustainability	5.1	5.1	5.6	5.3
price	23.5	23.7	14.1	20.9
comfort / fit	16.2	22.1	14.6	18.0
quality	23.9	21.3	29.3	24.5
familiar brand	7.7	6.3	13.6	8.9
trends / looks	21.8	20.2	19.7	20.6
other	1.7	0.8	3.0	1.8
prefer not to say		0.4		0.1

Note. All values are represented in percent.

Table 5.

Correlation between Willingness to Pay Price Increase *x* and Age

		Location			
Age Group	Price Increase	United States	Germany	Italy	Total
16 - 18	0%	7.7	50.0	43.8	25.0
	5%	11.5	16.7	12.5	12.5
	10%	38.5	33.3	25.0	33.3
	25%	7.7		12.5	8.3
	50%	19,2			10.4
	75%	3.8		6.3	4.2
	100%	7.7			4.2
	over 100%	3.8			2.1
19 - 24	0%	11.4	3.4	13.7	9.3
	5%	10.5	10.9	10.8	10.7
	10%	28.9	34.5	29.4	31.0
	25%	23.7	31.9	28.4	28.1
	50%	14.0	10.1	7.8	10.7
	75%	5.3	4.2	7.8	5.7
	100%	5.3	4.2	2.0	3.9
	over 100%	0.9	0.8		0.6
25 - 30	0%	16.0	5.5	5.0	8.6
	5%	14.9	14.1	13.8	14.2
	10%	29.8	25.8	45.0	32.1
	25%	24.5	35.9	26.3	29.8
	50%	10.6	14.1	3.8	10.3
	75%	3.2	1.6	5.0	3.0
	100%	1.1	2.3	1.3	1.7
	over 100%		0.8		0.3

Note. All values are represented in percent.

Table 6.

Correlation between Reasons of Non-Sustainable Purchase and Gender

		Location			
Gender	Reasons of Non-Sustainable Purchase	United States	Germany	Italy	Total
Male	no interest	8.5	9.8	4.7	7.7
	expensive prices	25.5	30.5	25.6	27.2
	non-fashionable designs	10.6	7.3	9.3	9.1
	difficult to determine	29.8	26.8	27.9	28.2
	limited availability	10.6	20.7	20.9	17.4
	other	10.6	1.2	9.3	7.0
	prefer not to say	4.3	3.7	2.3	3.4
Female	no interest	5.8	3.7	3.8	4.4
	expensive prices	24.0	34.1	23.7	27.0
	non-fashionable designs	13.5	17.3	13.0	14.6
	difficult to determine	21.6	16.8	21.4	20.0
	limited availability	26.9	22.4	31.3	26.9
	other	5.3	3.3	5.3	4.6
	prefer not to say	2.9	2.3	1.5	2.2

Note. All values are represented in percent.

Table 7.

Correlation between Sustainable Purchase Motivation and Location

	Location			
Purchase Motivation	United States	Germany	Italy	Total
environment	27.27	26.89	19.72	25.3
workers protection	10.10	21.00	8.45	14.2
animals	3.03	1.68	4.23	2.8
people, planet & animals	52.53	47.90	56.34	51.6
no specific reason	2.02	0.84	1.41	1.4
other	5.05	1.68	9.86	4.8

Note. All values are represented in percent.

Table 8.

Correlation between Future of Damaged Clothes and Age

		Location			
Age	Future of Damaged Clothes	United States	Germany	Italy	Total
16 - 18	repair	26.5	16.7	18.8	20.7
	dispose	50.0	83.3	81.3	71.5
	recycle	23.5			7.9
19 - 24	repair	31.7	39.1	40.1	37.0
	dispose	36.0	28.7	34.9	33.2
	recycle	31.1	29.9	24.3	28.4
	prefer not to say	1.2	2.3	0.7	1.4
25 - 30	repair	29.3	36.5	36.5	34.1
	dispose	29.3	28.6	31.3	29.7
	recycle	40.0	33.3	32.2	35.2
	prefer not to say	1.4	1.6		1.0

Note. All values are represented in percent.

Table 9.

Correlation between Future of Unwanted Clothes and Location

	Location			
Future of Unwanted Clothes	United States	Germany	Italy	Total
dispose	14.8	11.3	14.4	13.5
sell	16.5	26.1	20.1	20.9
donate	43.7	42.0	38.5	41.4
return to company	5.8	5.3	9.6	6.9
recycle / reuse	14.3	13.0	13.3	13.5
other	4.4	1.7	3.7	3.3
prefer not to say	0.5	0.6	0.3	0.5

Note. All values are represented in percent.

Table 10.

Correlation between Importance of Sustainable Fashion and Location

	Location			
Importance of Sustainable Fashion	United States	Germany	Italy	Total
Agree	60.3	73.9	65.7	66.9
Neither Agree Nor Disagree	30.3	19.8	23.7	24.5
Disagree	9.4	6.3	10.6	8.6

Note. All values are represented in percent.

Table 11.

Correlation between Importance of Aesthetic & Price > Sustainability and Gender

		Location			
Gender	Importance of Aesthetic & Price > Sustainability	United States	Germany	Italy	Total
Male	Agree	46.6	43.1	47.3	45.5
	Neither Agree Nor Disagree	35.6	40.3	40.0	38.5
	Disagree	17.8	16.7	12.7	16.0
Female	Agree	30.9	32.6	28.3	30.8
	Neither Agree Nor Disagree	44.7	36.5	52.2	43.7
	Disagree	24.3	30.9	19.6	25.5
Non-Binary	Agree	25.0		33.3	27.3
	Neither Agree Nor Disagree	12.5		66.6	27.3
	Disagree	62.5			45.5

Note. All values are represented in percent.

Table 12.

Correlation between Importance of Workers Protection and Location

	Location			
Importance of Workers Protection	United States	Germany	Italy	Total
Agree	82.9	85.8	81.8	83.6
Neither Agree Nor Disagree	13.2	12.6	16.2	13.9
Disagree	3.8	1.6	2.0	2.5

Note. All values are represented in percent.

Appendix E: Interview Consent Form A

Consent Form for the Research on 'Sustainable Customer Contribution in the Fashion Industry'

YOU WILL BE GIVEN A COPY OF THIS INFORMED CONSENT FORM

Please tick the appropriate boxes	Yes	No
I have read and understood the information about the research. I have been able to ask questions about the study and my questions have been answered appropriately.	O	O
I consent to voluntarily participate in this research and understand that I can refuse to answer questions, as well as withdraw from the study at any time, without having to give a reason or fear any consequences.	O	O
I understand that taking part in the research involves answering questions throughout an interview, of which the researcher will take notes. Despite that, the interview will be audio recorded and later on transcribed which ultimately results in the audio recording being deleted.	O	O
I agree to my interview being audio-recorded.	O	O
I understand that the information provided by me will be treated confidentially and strictly be used for the purpose of this research.	O	O
I understand that personal information that can identify me, such as my name, will not be shared beyond the researcher and the associated supervisor, if I ask to stay anonymous.	O	O
I give the researcher the permission to keep my contact information and to contact me for future research projects.	O	O
I understand that I can contact the researcher after the interview in order to access the transcript / information provided by me or to receive further information about the research project and its outcomes.	O	O

Signatures

Name of participant [printed]	Signature	Date

I have accurately read out the information sheet to the potential participant and, to the best of my ability, ensured that the participant understands to what they are freely consenting.

Researcher name [printed]	Signature	Date

UNIVERSITY OF TWENTE.

Appendix F: Interview Consent Form B

Consent Form for the Research on 'Sustainable Customer Contribution in the Fashion Industry'

YOU WILL BE GIVEN A COPY OF THIS INFORMED CONSENT FORM

Please tick the appropriate boxes	Yes	No
I have read and understood the information about the research. I have been able to ask questions about the study and my questions have been answered appropriately.	O	O
I consent to voluntarily participate in this research and understand that I can refuse to answer questions, as well as withdraw from the study at any time, without having to give a reason or fear any consequences.	O	O
I understand that taking part in the research involves answering questions which have been forwarded to me via email.	O	O
I understand that the information provided by me will be treated confidentially and strictly be used for the purpose of this research.	O	O
I understand that personal information that can identify me, such as my name, will not be shared beyond the researcher and the associated supervisor, if I ask to stay anonymous.	O	O
I give the researcher the permission to keep my contact information and to contact me for future research projects.	O	O
I understand that I can contact the researcher after the interview in order to access the transcript / information provided by me or to receive further information about the research project and its outcomes.	O	O

Signatures

Name of participant [printed]	Signature	Date

I have accurately read out the information sheet to the potential participant and, to the best of my ability, ensured that the participant understands to what they are freely consenting.

Researcher name [printed]	Signature	Date

UNIVERSITY OF TWENTE.

Appendix G: Interview Expert Overview

Expert	Function Within The Business	Location
A	Owner of the Brand	Germany
B	Owner of the Brand	Germany
C	Owner of the Brand	Italy
D	Sustainability Ambassador	Italy
E	Owner of the Brand	The United States of America

Appendix H: Interview Transcripts

H.1. Interview with Expert A

Ich finde es total super das du so transparent bist im Bezug auf wo und wie was herstellt wird. Viele Unternehmen sind nämlich nicht so offen gegenüber ihren Kunden. Du warst 7 Monate in Kolumbien um die Produktion deiner Produkte zu begleiten. Ich kann mir vorstellen, dass es eine sehr eindrucksvolle Zeit war in welcher man viel dazulernen konnte, aber wahrscheinlich auch sehr herausfordernd dadurch das man das Unternehmen aufgebaut hat. Würdest du diese Zeit als die größte Herausforderung für ein nachhaltiges Unternehmen betiteln oder gibt es noch andere Aspekte welche eine große Rolle spielen?

Ich denke, dass grundsätzlich für alle Unternehmer die Startzeit eine herausfordernde Zeit ist, weil man das Grundgerüst der Firma erst einmal erbauen muss. Man muss sich Gedanken darüber machen welche Rechtsform, welcher Name, welcher Stil - das sind sehr viele Dinge die man am Anfang einmal festlegen muss. Für eine nachhaltige Firma ist es denke ich die Herausforderung die eigene Vision für andere greifbar zu machen. Wenn man ein nachhaltiges Konzept entwickelt sind das häufig, und so war es bei mir auch, Entwicklungen die neuartig sind, welche sich andere nicht vorstellen können bis sie das erste Mal ein Produkt in der Hand halten. In meinem Beispiel war es so das diese natürlichen Merkmale vom Leder und der Wunsch nach mehr Natürlichkeit und weniger Rohstoffverschwendung die Zuhörer häufig überfordern. Ab dem Zeitpunkt wo das erste Produkt dann in den Verkauf gegangen ist konnte ich meine Vision viel besser abbilden was unglaublich geholfen hat, allerdings war die Zeit davor dementsprechend auch die schwierigste Phase. Aber auch die Tatsache das es eine stetige Entwicklung ist. Als ich angefangen habe die Produkte zu verkaufen da war sehr vieles entschieden, aber gerade im nachhaltigen Kontext kann man eben auch uferlos werden - man wünscht sich so viel zu berücksichtigen wie nur möglich. Meine ersten Produkte kommen aus Kolumbien. Das ist ein kleiner Familienbetrieb und die arbeiten ganz eng mit einer Gerberei zusammen und wissen wie die Tiere gehalten werden. Ich musste mich aber auf das was mir gesagt wurde verlassen. Das hat den Ursprung das Leder keiner Kennzeichnungspflicht unterliegt und der Endverbraucher nicht nachvollziehen kann woher das Leder stammt (welches Tier, wie lange hat es gelebt, wie wurde es gehalten). Dieselbe Problematik befindet sich aber auch in der Wertschöpfungskette, das heißt der Designer der das Leder einkauft muss sich darauf verlassen, dass die Angaben korrekt sind da es keine Kennzeichnungspflicht gibt und somit war es für mich als Unternehmerin auch die Herausforderungen zu sagen “Ich starte jetzt in den Verkauf, es ist für den Moment gut genug und die Entwicklung darf auch in der Öffentlichkeit stattfinden.” Die Produkte die jetzt zum Weihnachtsgeschäft auf den Markt kommen sind komplett in Deutschland gefertigt. Ich habe angefangen mit Biobauern und Ökojägern aus Deutschland zu arbeiten und mich mehr auf das Regionale zu konzentrieren. Die Fertigung findet komplett in Deutschland statt und so wird es immer weitergehen. Ich hoffe, dass wir immer transparenter, immer konsequenter und nachhaltiger werden können.

Ich kann mir vorstellen, dass es ziemlich schwierig ist sich auf die Aussagen der Anderen zu verlassen, vorallem auch weil vieles heutzutage versprochen und dann doch nicht wie *abgemacht ausgeführt wird. Solange dieses Vertrauen allerdings da ist geht das Ganze in die richtige Richtung.*

Das denke ich auch. Aber das Vertrauen der Endkonsumenten wurde, meiner Meinung nach, bereits extrem missbraucht durch viele Siegel die auf den Markt gebracht worden sind, häufig nur mit den besten Absichten, bei welchen dann aber nach einer gewissen Zeit herausgestellt wurde, dass sie doch käuflich oder nicht so konsequent sind und somit nicht das sind was sie versprechen. Das war für mich der Anlass zu sagen "Ich hole die Rohware bei den Bauern selber ab und mach mir selber einen Einblick davon" - verschaffe mir also den Einblick darüber wie es den Tieren geht, wie lange sie leben dürfen und wie die Haltung ist. Das ist meine Herangehensweise um gewisse Dinge sicherzustellen, aber der Endverbraucher muss wiederum auch mir vertrauen.

Ich glaube, dass der Endverbaucher auch genau auf diesem Vertrauen, dieser Transparenz, seine Kaufentscheidung bildet. Denkst du es gibt auch noch andere Faktoren die sehr einflussreich sind? Zum Beispiel Qualität oder Preis.

Auf jeden Fall. Ich denke, dass wir gesellschaftlich so erzogen worden sind, dass wir auf den Preis zu viel Wert legen. Ich glaube, dass dieses Belohnungsgefühl was los getreten wird wenn man 5 Euro oder 15 Euro sparen kann leider zu stark ausgeprägt ist. Man geiert im Endeffekt danach Geld zu sparen. Als Beispiel: Ob man sich ein paar Lederschuhe für 500 Euro kauft welche dann aber auch über 7 - 8 Jahre lang mit einer guten Pflege getragen werden können oder ob man sich für 50 Euro ein bis zweimal im Jahr Lederschuhe kauft, kommt am Ende auf dasselbe hinaus. Man unterstützt aber den richtigen Trend. Die Werte 'Preis-Leistungsverhältnis' auf die momentan geachtet wird sind nachvollziehbar, aber die Verantwortung die jeder Einzelne trägt sollte geschärft werden. Auch wenn man vielleicht als Einzelperson das Gefühl hat keinen Einfluss zu haben, wenn man sich ins Bewusstsein rufen das man zu preiswerten Anbietern geht von denen man weiß die Näher und Näherinnen werden nicht fair bezahlt und die Leute sind Pestiziden und Schadstoffen ausgesetzt, wenn man als Konsument genau das meidet dann kann diese Industrie auch nicht weiter wachsen und daher denke ich, dass genau diese Werte mehr in den Vordergrund rücken sollten.

Das stimmt auf jeden Fall. Wenn sich das Bewusstsein für diese Aspekte verstärkt, dann wird sich einiges ändern. Allerdings muss dafür noch einiges getan werden. Zusammenfassend kann man also sagen das nicht nur funktionale und soziale Werte eine Rolle bei der Kaufentscheidung spielen sollten, sondern auch die emotionalen Werte viel mehr entwickelt werden müssen.

Da gehe ich zu hundert Prozent mit, weil die Produkte die wir mittlerweile konsumieren auch gar keine emotionale Verbindung mehr haben wenn sie eben nur aus Langeweile gekauft werden und dann mit dem Etikett im Schrank verweilen. Wir haben keine Bindung zu diesem Produkt und keine Bindung zu dem Wert. Ich finde es so erschreckend das gerade im Lederbereich vor ein paar Jahren Sachen mit ‚handmade' deklariert wurden und wodurch ein höherer Preis gerechtfertigt worden ist, weil Verkäufer gesagt haben „Oh schau es ist handgemacht". Aber alles ist handgemacht! Es gibt keine Maschine die von einem lebenden

Tier bis zu einem preiswerten Lederprodukt alles übernimmt. Es sind ganz ganz viele Hände, ganz ganz viel Wissen, ganz ganz viele einzelne Stationen die es benötigt um einen Lederprodukt herzustellen, egal wieviel das kostet. Man kann natürlich auch für ein Produkt das nur 5 Euro kostet einen hohen emotionalen Wert entwickeln, aber ich glaube das ist der entscheidende Punkt. Wenn du eine Bindung zu deinen Habseligkeiten hast, zu den Dingen die du besitzt, dann gehst du auch korrekt damit um.

Würdest du sagen, dass die Verbraucher hauptsächlich zu nachhaltiger Mode beitragen können indem sie weniger und wenn dann die richtige (nachhaltige) Mode kaufen oder entsteht ein großer Beitrag auch am Ende des Life Cycles des Produktes auf Grund des richtigen Recycling durch den Konsumenten?

Meiner Meinung nach liegt die Verantwortung bei den Herstellern. Der Endverbraucher kann durch die Auswahl die er trifft etwas Positives / Kraftvolles bewirken, aber dafür muss das Bewusstsein geschärft werden. Man sollte nicht in der Ohnmacht versinken „Wir leben im 21 Jahrhundert da kann man sowieso nichts dagegen machen“, denn das entspricht nicht der Wahrheit. Es gibt Alternativen sowohl in der Mode als auch in bei den Lebensmitteln. Trotzdem kann man von den Endverbrauchern nicht erwarten, dass sie neben dem normalen Alltag sich auch noch stundenlang damit auseinandersetzen was man konsumieren sollte und was nicht damit unsere Welt eine Bessere wird. Das sind eben auch häufig politische Entscheidungen, wie zum Beispiel die fehlende Kennzeichnungspflicht von Leder. Es dürfte nicht sein, dass so viele Gerüchte über Leder kursieren, weil man keine Informationen darüber weiterleiten muss. Genau das ist die Verantwortung auf der Seite der Unternehmer und auch der Regierung. Die Organization IJM setzt sich für genau solche Dinge ein, zum Beispiel dafür das wir keine moderne Sklaverei mehr auf der Welt haben, weil eben auf Regierungsebene sehr viele Sachen entschieden und losgetreten werden die eine moderne Sklaverei begünstigen. Ich habe eine Ausbildung zur Bekleidungstechnikerin gemacht und danach habe ich Designmanagement studiert. In meiner Ausbildung haben wir auch über die Gehälter in Bangladesch gesprochen und ob es rechtzufertigen ist, dass die Arbeiter nur so wenig Geld in der Stunde bekommen. Aus unserer Perspektive ist es furchtbar, aber hinsichtlich der Herkunft der Näherin ist es ein vergleichsweise guter Job der die Lebenshaltungskosten decken kann. Die Arbeit von IJM setzt auf Regierungsebene an um zu zeigen, dass da unheimlich viel Korruption hinter steckt. Die ermittelten Mindestlöhne haben nichts mit den tatsächlichen Mindestlöhnen des Landes zu tun sondern sind so gering angesetzt, dass wir die Großkunden im internationalen Trend nicht verlieren. Und gegen genau solche Ausmaße kann der Endverbraucher allein nicht ankommen.

Der Endverbraucher trägt also nur minimal zur Veränderung bei, mit zum Beispiel einem gesteigerten Bewusstsein für nachhaltige Mode und dem dadurch geänderten Kaufverhalten, aber im Großen und Ganzen sind es die Firmen und die Regierung die etwas unternehmen müssen.

Am Ende braucht es beides. Wenn an der einen Seite immer weiter Gift in den Fluss gekippt wird, dann können am anderen Ende des Flusses so viele Leute wie möglich mit anpacken und versuchen ihn zu reinigen, aber schlussendlich wird sich nicht viel ändern.

Es ist also ein Zusammenspiel von allen. Man kennt es ja selber: Man geht einkaufen und nimmt sich vor die Produkte bewusster auszuwählen, aber am Ende wird man zum Kauf von etwas komplett anderem verleitet einfach weil es so viel Auswahl gibt. Und vieles davon ist leider nicht nachhaltig, was sich ja nicht nur auf die Materialien bezieht sondern auch auf die Bezahlung der Arbeiter oder die generelle Herstellung. Da spielen ganz viele Faktoren ja eine Rolle.

Absolut! Plus die Gefahr vor ‚greenwashing'. Viele Firmen sehen es als Trend nachhaltig zu produzieren und tun so als ob um ihre Umsätze zu steigern. Das kann durchaus zur Gefahr werden, vorallem wenn auf einmal alles aus Bio hergestellt wird. Kurz vor glaub ich 7 Jahren hat Biobaumwolle angefangen total wichtig zu werden und da sieht man auch die Bereitschaft und das Interesse der Endkonsumenten. Alle haben darauf geachtet, dass wir Biobaumwolle konsumieren und dass das richtig ist, ist auch gar keine Frage, aber dieses gefährliche Halbwissen kann halt auch dazu führen das wir andere tolle Trends verpassen. Ich glaube der Kunde will unbedingt das Richtige machen, aber es braucht eben mehr Information und Wissen darüber was hinter den Kulissen alles passiert um es richtig machen zu können.

Da stimme ich zu! Bei der Auswertung der Kundenumfragen wurde ‚greenwashing' auch relativ oft als Grund genannt, wieso Verbraucher nicht daran interessiert oder skeptisch bei der Auswahl sind nachhaltige Mode zu kaufen. Andere Gründe waren aber auch zum Beispiel der erhöhte Preis im Gegensatz zum T-Shirt beim Discounter oder die Tatsache das es relativ schwer ist für den Verbraucher herauszustellen was nachhaltig ist und was eben nicht. Worauf muss ich achten um sicherzugehen dass ich mir das nachhaltige T-shirt aussuche? Einige wissen einfach nicht wo genau der Unterschied liegt. Das Bewusstsein der Verbraucher und die Transparenz der Unternehmen fehlt. Denkst du das diese Gründe die Ausschlaggebenden sind wieso nicht nachhaltig eingekauft wird oder kannst du dir noch andere Gründe vorstellen?

Ich glaube das sind genau diese Aspekte! Also zum einen eben der Preis, da viele so erzogen worden sind das es besser ist 10 Teile für wenig Geld zu kaufen, anstatt eins mit mehr Qualität und einem höheren Preis. Hier auch wieder eine simple Rechnung: Bei einer Lederhandtasche für 49.99 Euro ist es mittlerweile relativ verbreitet das die Industrie im Sinne von Verkauf nochmal 100% Gewinnmarge draufschlägt. Wenn man die restlichen 25 Euro dann nochmal in nähen, transportieren, lagern, verschicken, gerben splittet dann kann man sich eigentlich schon sehr leicht vorstellen wie wenig die einzelnen Posten daran verdienen und wie sehr sie dementsprechend auch ums Überleben kämpfen müssen. Dann steigt auch der Trend ins Ausland zu gehen, weil es in Deutschland und Europa unter solchen Bedingungen gar nicht möglich wäre zu produzieren. Der Preis schreckt viele ab. Ich weiß leider nicht mehr wer es gesagt hat, aber es ist so ein gutes Zitat: „Irgendjemand zahlt den Preis". Das heißt wenn wir weniger bezahlen muss irgendjemand den echten Preis zahlen und sei es in welcher Form auch immer. Leider trifft es das auch genau auf den Punkt. Wenn wir weniger Geld für etwas ausgeben und uns in dem Moment total freuen, das Produkt aber vielleicht missachten durch nur zweimal benutzen und dann wegschmeißen oder verschenken oder vergessen, aber irgendjemand an einem anderen Ort auf dieser Welt eben den tatsächlichen Preis bezahlen muss, das bringt glaube ich auch viele Leute zu diesem Umdenken. ‚Greenwashing' ist super nervig, weil es eben mit dem Vertrauen spielt und mit Vertrauen sollte man niemals spielen.

Es gibt halt auch Konzerne die darauf aufbauen so zu tun als ob und bis diese Unternehmen entlarvt sind oder ob sie überhaupt entlarvt werden können, weil halt vieles nicht nach außen transportiert werden muss und noch nicht nach außen kommuniziert werden muss, ist schwierig. Ich denke diese beiden Punkte sind die wesentlichsten Hindernisse.

Es ist immer ein Zusammenspiel zwischen diesen beiden Aspekten meiner Meinung nach. Vorallem wenn die großen Firmen dieses typische ‚greenwashing' betreiben, dann ist auch das Vertrauen von dem Verbraucher, vorallem auch gegenüber kleineren Unternehmen, viel geringer. Man denkt sich oft „Ok, warum kann ich das gleiche Kleidungsstück bei den großen Unternehmen für einen niedrigen Preis erwerben, aber das kleine Unternehmen verlangt viel mehr von mir". Da verstehen glaube ich viele einfach nicht, dass das Produkt durch so viele unterschiedliche Produktionsschritte geht und dies den höheren Preis gerechtfertigt.

Absolut! Bei einer Demo vom Bauernverband in Berlin hat mal eine Landwirtin einen Vortrag gehalten und sie meinte „Meiner Meinung nach sollten wir die Produkte deklarieren die giftig sind, die mit Menschenhandel und mit moderner Sklaverei in Verbindung stehen und nicht die Produkte die dies nicht tun" und das bringt es eigentlich ziemlich gut auf den Punkt. In was für einer Welt leben wir denn, dass wir das was eigentlich der Standard sein sollte hervorheben müssen? Warum muss Regionalität und all diese Aspekte mit denen jetzt geworden wird so extrem in den Vordergrund gezogen werden? Ich finde es schon extrem das wir in so einer Zeit leben. Jetzt auf einmal sind in Shampoo keine Silikone mehr, dann denkst du dir als Verbraucher auch „Okay, also war der ganze Mist vorher in den Produkten?". Man geht halt auch erst einmal nicht davon aus, dass jemand so zwielichtige Produkte auf den Markt bringt aus Geldgier. ‚Greenwashing' macht die Vergleiche für den Verbraucher zudem schwieriger was ich schade finde. Dann sollen Unternehmen halt ihre nicht nachhaltigen Produkte haben, aber auch dazu stehen. Dann kann der Verbraucher immer noch sagen „Ok, da sind jetzt die und die Inhaltsstoffe drin und es ist vielleicht nicht so vorbildlich, aber dafür bezahle ich weniger und damit kann ich Leben". Aber wenn es dann darauf hinausläuft, dass man denkt man konsumiert was Gutes für den geringen Preis, dann laufen die Leute wieder ins Nichts und das finde ich nicht fair – das dürfte es nicht mehr geben.

Das ist ein sehr guter Punkt! Man sollte lieber Produkte kennzeichnen, welche nicht den fairen Standards und Herstellungskriterien gerecht werden und nicht die Produkte, die genau das Richtige unterstreichen – sei es im Bezug auf die Materialen, die Arbeitsbedingungen oder sonst etwas. Bei allen Sprühfarben, zum Beispiel, ist eine Kennzeichnung das man möglichst kein Feuer in der Nähe der Dose gebrauchen sollte auf Grund von Explosionsgefahr. Bei vielen anderen Bereichen und vor allem auch in der Mode-Branche, steht es allerdings nicht auf dem Etikett.

Total! Das ist auch ein gutes Beispiel von dir! Beim Leder gibt es tatsächlich Gerbformen die in Europa nicht erlaubt sind, nicht zugelassen sind, weil die Chromearten mit denen gegerbt wird krebserzeugend und giftig sind. Diese Gerbformen wirken aber eben doch anscheinend so erschwinglich, dass es in anderen Bereichen der Welt noch Gang und Gäbe ist damit zu arbeiten. Die Arbeiter stehen ohne irgendeinen Schutz in diesen Gerbwasserbehältern und zahlen den Preis. Wir zahlen dann vielleicht nur 5 Euro für dieses süßes kleines

Lederportemonnaie, aber dafür hat jemand auch tagelang in Chromewasser gestanden und hat sich eben diesem Risiko ausgeliefert oder musste sich diesem Risiko ausliefern weil es halt sein Job ist. Das ist gruselig und deswegen bin ich unheimlich froh eben auch mit deutschen Gerbereien zusammenzuarbeiten. Vorallem auch weil ich in Kolumbien eben Einblick hatte, kann ich sagen, dass es einfach nochmal etwas anderes ist in Deutschland zu produzieren, vorallem auch weil die Umweltschutzauflagen in Deutschland einfach unheimlich vorbildlich sind.

Das habe ich auch bei meiner Recherche gemerkt. Im Vergleich zu den USA ist Deutschland um einiges weiter was den nachhaltigen Konsum und die nachhaltige Herstellung betrifft.

Das glaube ich gerne, aber das ist doch auch toll. Wir sollten stolz darauf sein und mehr Produkte aus Deutschland konsumiert. Auch von den Filmen einfordern das sie zeigen wo ihre Produkte herkommen.

Noch mal eine ganz andere Frage: Glaubst du, dass die Verbraucher recycelte Kleidung weniger akzeptieren, da es von jemanden anderem schon einmal getragen wurde oder bewegen wir uns in diesem Aspekt hier in Deutschland schon in die richtige Richtung?

Ich denke es geht immer noch mehr. Ich arbeite jetzt mit einem Unternehmen zusammen, welches Kleidungsstücke zur Vermietung anbietet. Man kann sich die Produkte also für eine Zeit lang ausleihen und dann wieder zurückgeben. Dadurch kommt man aus diesem ‚immer kaufen und wegschmeißen bzw. entsorgen' eben auch raus. Meiner Meinung nach sind wir im internationalen Vergleich hinsichtlich gebrauchter Bekleidung schon ziemlich weit. Wir haben Flohmärkte, wir haben Vinted, Ebay Kleinanzeigen und Ebay. In Deutschland haben wir schon einen ziemlich tollen Markt für Sachen die andere nicht mehr haben wollen. In Kolumbien hat es mich zum Beispiel sehr überrascht: Die haben keine Flohmärkte, die haben auch nicht sowas wie Ebay Kleinanzeigen und es ist für die Leute dort noch immer eine richtig eklige Vorstellung irgendetwas zu besitzen was jemand anderes schon einmal an hatte. Es mag für einige noch immer ein Hindernis sein, aber im internationalen Vergleich sind wir in Deutschland schon ziemlich gut aufgestellt.

Im Bezug auf Vinted oder ähnlichen Platformen habe ich einmal gelesen, dass es in gewisser Art und Weise dazu beitragen könnte das Verbraucher vermehrt Kleidungsstücke kaufen da es eine einfache Möglichkeit gibt alte Kleidung mit Profit loszuwerden. Das dieser Platz im Kleiderschrank quasi zu einem noch extremeren Konsum verleitet. Wie siehst du das?

Interessante Ansicht. Ich kann verstehen, dass man das so betrachtet, aber meiner Meinung nach ist es eher Verantwortung übernehmen für das was man kauft. Jemand der einfach gerne viel konsumiert und es sich leisten kann, würde sich nicht davon abhalten lassen, wenn es Vinted nicht gäbe. Es gibt genug Leute die ihre Sachen einfach liegenlassen. Meiner Meinung nach ist das eher eine Möglichkeit einen Gebrauchtmarkt zu etablieren der eben verantwortungsvoll die Sachen weiter reicht. Das sind ja vorallem nicht nur Dinge die ein oder zwei Mal getragen wurden und dann wieder verkauft werden, sondern es sind ja auch viele Kleidungsstücke dabei die auf dem Flohmarket gekauft wurden oder solche die ein

Verbraucher schon seit Jahren besitzt. Ich glaube das solche Platformen eine total positive Möglichkeit darstellen, sehr unkompliziert die eigenen Sachen weiterzureichen.

Glaubst du, dass diese Art von Recycling auch das größte Potenzial hat oder gibt es andere Möglichkeiten, wie zum Beispiel Spendencontainer für Bekleidung oder das Tauschen von alter Kleidung für einen Gutschein, welche mehr Potential für beide Seiten, also den Verbraucher und die Unternehmen, haben?

Ich glaube, dass das alles in die absolut richtige Richtung geht. Keines dieser Konzepte und auch keine Kombination dieser Konzepte kann den Konsum beenden, weil dieser Reiz nach neuen Trends, nach neuen Produkten besteht. Vieles hat es schon einmal irgendwie gegeben und wird jetzt wieder zum Trend, aber ich denke es ist durchweg positiv wenn auch gerade die großen Konzerne sich Gedanken machen wie man das wegschmeißen verhindern und das am Leben halten ermöglichen kann. Die Verantwortung verschärfen und sich auch mit Up-Cycling, Recycling, Reusing, Reducing, also diese ganzen Sachen, auseinandersetzen. Das ist wichtig um am Ende auch Müll zu reduzieren. Bei mir war genau das ja auch der Wunsch bei den Rohstoffen. Leder ist ein Abfallprodukt der Fleischindustrie und wenn wir, wohin der Trend in Deutschland momentan geht, viele Rohhäute nicht verwenden dann heißt das nicht das dementsprechend weniger Tiere geschlachtet werden, sondern das ist dann eben eine Rohstoffverschwendung, weil der Rohstoff weggeschmissen wird. Ich versuche mir gerade vorzustellen ob das jetzt wirklich von Vorteil ist wenn das alles immer in Bewegung bleibt. Natürlich muss man auch bedenken wieviel man tatsächlich konsumieren sollte. Selbst wenn es total viele coole Möglichkeiten gibt die Sachen dann weiterzuverkaufen oder zu recyceln oder in die Altkleiderspende zu geben, wie viele Produkte brauchen wir wirklich noch oder wie viele Produkte braucht jeder einzelne? Braucht man wirklich 20 Jeans, 50 Kleider, 23 Portemonnaies? Deswegen bin ich auch super glücklich über diese Kooperation mit dem Unternehmen welches anbietet Mode zu mieten, weil ich glaube dass genau das extrem wichtig ist und relevanter wird in der Zukunft.

Ich glaube, dass diese Mietoption von Kleidungsstücken auch noch einmal eher etwas für kleinere Unternehmen ist anstatt für große Konzerne. Vielleicht sogar auch verlockender als die Option Gutscheine für Kunden anzubieten, die ihre alten Kleidungsstücke zurück in den Laden bringen. Kleinere Unternehmen haben teilweise ja auch gar nicht die Möglichkeiten dazu so etwas überhaupt anzubieten, da es eine andere Art der Produktion verlangt.

Super spannender Punkt! Das hängt eben auch, wie du schon gesagt hast, absolut von der Firmengröße ab. Zusammenfassend kann man sagen das jeder Verantwortung übernehmen muss. Wenn ich als Unternehmerin und als Kundin Verantwortung übernehme oder wenn Vinted Verantwortung übernimmt oder H&M, das sind natürlich komplett andere Vorangehensweisen. Das sind ganz andere Sachen die da losgetreten werden müssen damit alle am Ende des Tages sagen können „Wir übernehmen Verantwortung“, aber wenn alle wirklich ernst gemeint Verantwortung übernehmen dann bewegen wir uns in die richtige Richtung. Einige große Firmen setzen ja schon Zeichen für mehr Bewusstsein und dienen als Vorbild. Wenn der Anbieter einen Trend setzt und der Verbraucher sich danach richtet, was ja auch tatsächlich passiert - man hat eine handvoll Marken mit denen man sich verbindet, man kennt die Schnitte, das Material, der Preis passt – dann können die Anbieter dementsprechend ihre Fanbase nutzen und Impulse setzen.

Was glaubst du denn generell was die beste Marketing Strategie ist um das Bewusstsein der Verbraucher zu steigern? Social Media oder eher die Kampagnen von großen Unternehmen?

Transparenz und Nahbarkeit! Ich glaube die Leute erreicht man am besten in ihrem alltäglichen Herumgewusel zum Beispiel über die sozialen Medien. Aber auch über einen nachvollziehbaren Auftritt auf der eigenen Webseite.

Es gibt in der nachhaltigen Modebranche derzeit (leider) eine begrenzte Verfügbarkeit an Designs. Denkst du da wird sich in der Zukunft etwas dran ändern?

Mit meinen Produkten bewege ich mich in einer Nische, in der ich mich ganz wohl fühle. Meine ganz persönliche Meinung ist, dass es eben diese Nischenprodukte auch geben sollte und sie auch eine Daseinsberechtigung haben sollten. Für unseren Planeten ist es schädlich, wenn wir versuchen uns einheitlich auf irgendetwas zu verständigen - egal ob wir jetzt alle Kuhmilch trinken wollen oder ob wir auf einmal alle Hafermilch oder Reismilch trinken wollen. Wir können nicht weltweit alle das Gleiche machen. Diese Skalierung zu einem Monster-Konzern zu werden ist überhaupt nicht meine Absicht. Ich glaube, dass eben Monokulturen nicht begünstigt werden sollten da sie nicht gut sind für das System. Es gibt viele gute Ansätze, welche auch Nischen-Produkte unterstützen können. In unseren Innenstädten sollte es nicht mehr nur standardisierte Geschäfte geben, in den Shoppingcenter sollten nicht immer die gleichen Läden sein, sondern es sollte vermehrt Möglichkeiten für kleinere Unternehmen geben sich präsentieren zu können.

Absolut richtig was du da gesagt hast. In einem vorherigen Interview wurde bereits angesprochen, dass man vielleicht mehrere kleine Unternehmen zusammen vermarktet durch eine einzige Website um mehr Verfügbarkeit und mehr Designs vorzustellen. Somit muss nicht jedes einzelne Unternehmen mehr Auswahl anbieten, da die Vielfalt durch das Zusammenarbeiten der Unternehmen entsteht.

Finde ich auch, da gehe ich zu hundert Prozent mit. Die Schwierigkeit besteht nämlich auch dadurch das einzelne Unternehmen das Gefühl haben sie müssten wer weiß wie groß sein um eine Daseinsberechtigung zu haben. Das hat bei mir auch am Anfang den Druck ausgelöst und von vielen anderen habe ich es auch mitbekommen. Man hatte dieses Gefühl, dass man schon was weiß ich was alles auf die Beine gestellt haben muss um sich überhaupt präsentieren zu können. Gerade auch diese Unantastbarkeit wird von vielen Firmen aufrecht erhalten. Wenn sich mehrere kleine Labels zusammentun und dadurch eine andere Stärke entwickeln können, sich vielleicht dadurch eine Miete leisten können - das wäre super! Ich habe meine Produkte in München in einem Laden ausgestellt die einen PopUp Store ins Leben gerufen haben um nachhaltige Konzepte zu vertreten bzw. zu präsentieren mit dem Motto „Zusammen ist man stärker". Der Zusammenschluss von vielen Nischenprodukten oder kleinen Marken kann eben dazu beitragen, dass man den Trend tatsächlich verändern kann. Ich glaube, dass selbst wenn große Firmen die man kennt ‚Greenwashing' betreiben, man aber Platz schafft für kleine

Marken, für Newkommer, für ganz andere Denker, dann haben wir schon einiges richtig gemacht.

Das finde ich auch! Also generell dieses Konzept von einem Miteinander der kleinen Unternehmen ist auch viel besser als wenn die Vielfalt von Designs von jedem einzelnen Unternehmen ausgelebt wird. Dadurch hat man dann auch noch einmal ganz andere Designs und ganz andere Möglichkeiten und im Endeffekt ist dann auch viel eher für jeden etwas dabei.

Total! Design mäßig bin ich tatsächlich so ein bisschen limitierter. Eine Freundin von mir produziert Schmuck aus Gold und Silber. Wenn das Produkt mal nicht so gut ankommt, dann schmilzt sie es einfach wieder ein. Das Privileg habe ich nicht. Was bei mir auch ein bisschen der Hintergrund war warum die neuen Produkte auf sich warten lassen ist das die ganze Hintergrundarbeit eben noch nicht online zu sehen ist und einiges an Zeit anbedarf – mit den Biobauern, den Biojägern, der deutschen Produktion und der deutschen Gerberei. Dieses ganze System ist in Deutschland glaube ich in manchen Branchen schon so eingeschlafen, was wir jetzt auch durch die Pandemie spüren mussten, dass es einfach sehr viel Zeit gekostet hat alles aufzubauen.

H.2. Interview with Expert B

Was ist die größte Herausforderung / Challenge bei einem nachhaltigen Unternehmen?

Die größte Herausforderung für mich als kleines Start-up war zunächst eine geeignete Produktionsstätte zu finden. Mein Anspruch so ethisch und ökologisch wie möglich zu produzieren warf die Frage auf, wie ich das realisieren kann. Ein Weg, den einige Brands bereits verfolgen, ist im europäischen Ausland in zertifizierten Betrieben zu fertigen. Aber auch hier hat man als kleines Start-up das Problem der Mindest-Produktionsmengen und der Entfernung. Daher habe ich mich für einen anderen Weg entschieden, möglichst regional zu produzieren. Dabei war es anfänglich gar nicht so leicht überhaupt noch Schneidereien zu finden, und dann kommt es zwangsläufig zur nächsten Herausforderung - die Kosten. Denn natürlich ist es teurer in Deutschland zu produzieren, als beispielsweise in Osteuropa. Das heißt also, dass ein regional produziertes Produkt natürlich etwas teurer ist. Zudem kann ich als kleines Start-up keine Zertifikate verwenden, auch wenn die Stoffe, die ich kaufe zertifiziert sind, beispielsweise GOTS. Denn dafür müsste die gesamte Lieferkette zertifiziert sein, also auch die Schneidereien hier zu Lande, als auch ich selbst, also mein Brand, was mit enormen Kosten und Aufwand verbunden wäre.

Welche Faktoren beeinflussen die Kaufentscheidung der Kunden am meisten?

Ich fürchte leider, dass das Hauptkriterium, das eine Kaufentscheidung beeinflusst, zu mindestens bei den meisten, immer noch der Preis ist. Der Kunde ist nach Jahrzehnten immer mehr werdender Fast-Fashion „verwöhnt". Wer macht sich denn wirklich die Mühe im Laden mal zu hinterfragen, wie realistisch der Preis eines T-Shirts wirklich ist? Und was eigentlich dahinter steckt solch ein Kleidungsstück zu produzieren, angefangen vom Baumwollanbau, der Garnproduktion, Stoffweben, Schneidern, Design, Transport etc. Wenn ein Kunde allerdings bewusst „Fair&Nachhaltig“ kauft und bereit ist dafür mehr zu zahlen, dann entscheidet Qualität & Trend und eben vielleicht auch die Marke, mit der man sich identifiziert.

Welche Werte beeinflussen die Kaufentscheidung am meisten?

Ich glaube, das ist in erster Linie eine emotionale Entscheidung. Funktionalität, also - weiß ich für welchen „Anlass“ ich mir die Klamotte kaufe -, oder auch die „soziale“ Komponente, - also kaufe ich mit „gutem Gewissen“ - , gehen mit der Emotion ja einher.

Wie können Kunden am besten zur nachhaltigen Mode beitragen?

Darauf achten was man kauft und wo. Sich nur dann etwas kauft, wenn man es wirklich möchte oder braucht, also keine „Schrankleichen“ aus einer Laune heraus kaufen. Eher auf zeitloses Design setzen, als auf kurzweilige Trends. Und dann möglichst oft tragen. Und sollte es dann doch einmal nicht mehr das Richtige sein für sich selbst, dann weitergeben und nicht wegwerfen. Secondhand ist wieder gefragter denn je.

Die Umfragenergebnisse zeigen, dass deutsche Kunden aus folgenden Gründen keine nachhaltige Mode kaufen: hohe Preise, begrenzte Verfügbarkeit und durch Schwierigkeiten nachhaltige Mode zu erkennen. Teils auch wegen dem ‚Greenwashing‘ von großen Unternehmen und der dazugehörigen Ungewissheit ob bestimme Kleidungsstücke überhaupt nachhaltig produziert wurden – es fehlt an Transparenz. Stimmen Sie diesen Punkten zu oder glauben Sie, dass es andere wichtige Gründe gibt, warum Verbraucher keine nachhaltige Mode kaufen?

Ich glaube, die genannten Gründe stimmen im Großen und Ganzen schon, aber meines Erachtens fehlt noch ein wesentlicher weiterer Aspekt: Kleinen wirklich nachhaltigen Labels mangelt es noch an Sichtbarkeit/Bekanntheit! Der Kunde muss diese erstmal finden, ob online oder in entsprechenden Boutiquen. Durch das viele Greenwashing von großen Labels wird der Kunde, fürchte ich, auch abgeschreckt oder abgestumpft. Wenn nicht lautstark aufgeklärt wird, was Greenwashing ist und was nicht, verliert der Kunde, fürchte ich, irgendwann ganz das Vertrauen.

Glauben Sie, dass Verbraucher auch einen gewissen Widerstand gegenüber recycelter Kleidung entwickeln, da sie zuvor von jemanden anderem getragen wurde?

Ja, ich glaube das gibt es. Ich selbst würde keine Second-hand-Schuhe kaufen, da ich sie schlecht waschen kann… So gibt es sicherlich auch bei manchen eine Hemmschwelle bei Second-hand Kleidung. Aber ich glaube, gerade in der jüngeren Generation ist das weniger der Fall und die günstigeren Preise locken.

Was muss getan werden um Kunden stärker in die nachhaltige Modewelt einzubinden?

Es müsste noch viel mehr darüber gesprochen und berichtet und aufgeklärt werden. Auch was das Thema „Greenwashing“ anbelangt. Ich fürchte es gibt Kunden, die kaufen die H&M „Conscious Collection“ und glauben „nachhaltig“ eingekauft zu haben. Das ist natürlich fatal.

Und es müsste noch mehr Initiativen und Plattformen geben, die all den kleinen neuen Konzepten und Start-ups im Nachhaltigen-Fair-Fashion Sektor mehr Sichtbarkeit geben.

Sollte die Regierung mehr tun um nachhaltige Mode zu unterstützen? Wenn ja, in welcher Form?

Unbedingt. Das Lieferketten-Gesetz ist schon mal ein wichtiger Schritt in die richtige Richtung, aber noch viel, viel zu lasch. Es müssten Gesetzte gemacht werden, dass gewisse Produkte erst gar nicht hier auf den Markt kommen dürfen, also importiert werden dürfen. Produkte bei denen Menschenrechte verletzt wurden oder Chemikalien verwendet wurden, die bei der Verarbeitung schädlich sind, und später auch womöglich für den Konsumenten. Die Lebensmittelbranche unterliegt viel strengeren Regeln als die Bekleidungsindustrie, und das obwohl die Haut unser größtes Organ ist…Wenn all die Fast-Fashion -Label Mindestlohn zahlen würden und sich an Umweltstandarts halten müssten, dann könnten sie nicht mehr so billig produzieren, die Kleidung würde zwangsläufig etwas teuerer/„realistischer“ im Preis und wirklich nachhaltige Mode wäre nicht mehr so viel teurer als es jetzt den Anschein hat.

Was ist die effektivste Marketingstrategie um das Bewusstsein für nachhaltige Mode zu schärfen?

Zu zeigen, dass „Öko“ schon lange nicht mehr aussehen muss wie „öko“. Und ich glaube es ist ein Irrglaube, dass nachhaltige Mode zwangsläufig teuer ist. Es gibt inzwischen tolle Produkte zu absolut fairen Preisen. Der Kunde muss durch Aufklärung erfahren, dass „billige“ Mode immer zu Lasten von Irgendwem oder Irgendwas produziert wurde.

Es gibt eine Vielzahl von Recycling-Möglichkeiten wie zum Beispiel Secondhand Apps / Websites / Läden, Spendenstandorte oder die Rückgabe bei Unternehmen wie H&M. Welche dieser Möglichkeiten hat das größte Potenzial sowohl für Verbraucher als auch für nachhaltige Unternehmen (und warum)? Welche Gründe könnten Verbraucher davon abhalten solch Recycling-Möglichkeiten zu benutzen?

Ich glaube, das ist etwas Geschmacksache. Ich persönlich glaube eher an Secondhand, Das Flohmarkt-feeling und evtl. noch was am Verkauf zu verdienen, auch wenn fast nur symbolisch womöglich. Aber für ein bestimmtes Klientel ist denke ich die Rückgabemöglichkeit bei H&M eine gute Sache. In wie weit das wirklich Nachhaltig betrieben wird, oder Teil vom Greenwashing ist, weiß ich nicht.

Sehen Sie gewisse Probleme mit der Benutzung von Secondhand Apps wie zum Beispiel Vinted (aus nachhaltiger Sicht)?

Ich vermute worauf die Frage abzielt: „Es kann ja nicht gut sein, wenn die Kleidung erst in die Reinigung muss und dann per Post verschickt wird“. Fakt ist aber, dass all das mit eingerechnet wesentlich weniger Energie und Ressourcen verbraucht, unterm Strich, als ein neu produziertes Kleidungsstück. Wenn somit der Lebenszyklus einen Kleidungsstückes verlängert wird.

Große Unternehmen wie H&M zum Beispiel bieten Rabatte / Gutscheine für Kunden an, welche gebrauchte / nicht mehr gewollte Mode an das Unternehmen zurückgeben. Kleinere Unternehmen scheinen dieses Modell nicht in dem gleichen Maße anzuwenden. Was ist der Hauptgrund dafür?

Da das logistisch für kleine Unternehmen kaum machbar ist, es sei denn man hat bereits eine Rubrik „Second Hand" in seinem Konzept. Die Mehrkosten und der Mehraufwand der Reinigung, Reparatur oder gar Entsorgung, wäre für kleine Unternehmen enorm und vermutlich nicht wirtschaftlich. H&M wird, vermutlich, einen Großteil dieser Ware verschrotten oder in Dritte-Welt-Länder verkaufen, und nur ein kleiner Anteil wird vermutlich wirklich recycelt. Aber das ist nur meine Vermutung.

Begrenzte Verfügbarkeit / Designs oder auch höhere Preise sind Gründe für Kunden keine nachhaltige Mode zu kaufen. Glauben Sie, dass diese Aspekte künftig noch verbessert werden könnten?

Auf jeden Fall wird sich in diesem Sektor noch einiges bewegen. Man merkt auf den Stoffmessen bereits, dass viel mehr in diese Richtung entwickelt wird. Nachhaltigkeit, Klimaschutz, sozialverträgliche Produktion, oder regionale Produkte, das sind die Themen unserer Zeit momentan, mehr denn je. Daher glaube ich stark, dass sich auch im Bereich der nachhaltigen Mode noch viel tun wird. Designvielfalt gäbe es bereits, die muss nur entdeckt werden. Und je mehr Nachfrage entstehen wird, desto mehr wird entwickelt und kann auch zu niedrigeren Preisen irgendwann realisiert werden. Doch von einem muss man lernen sich zu verabschieden, das sind Fast-Fashion-Preise! Die wird man mit einem wirklich nachhaltigen und fair-produzierten Produkt niemals erreichen, und das kann auch nicht das Ziel sein. Der Kunde sollte eher den Wert eines Kleidungsstückes wieder verstehen und es entsprechend „wertschätzen" lernen. Dann kommt oft das Argument, dass sich viele nichts teureres leisten können, aber dann stellt sich mir die Frage, wie viele Kleidungsstücke muss ich mir denn kaufen können? - Less is more! -

H.3. Interview with Expert C

What is the most challenging part of having a sustainable business?

The cost of production and regulations (certifications) are the hardest part for a sustainable business.

What factors seem to influence the consumers purchasing decision the most?

In order: awareness, quality, price, brand loyalty, social trends

What value(s) influence the purchasing decision the most?

At the moment still the emotional one.

How can consumers contribute to sustainable fashion the most?

Buying less fast fashion and synthetic clothes.

Based on the survey responses it can be stated that Italian consumers are mostly resistant towards sustainable fashion due to limited availability, high prices and the difficulty of determining what items are actually sustainable. But also because of greenwashing from large companies and thus not knowing whether items are really sustainable – transparency is missing. Do you agree with these points or do you believe there are any other key factors why consumers do not purchase sustainable fashion?

The Italian consumer do not buy sustainable fashion for cultural reasons in which there is little green education. A in all Latin countries, attention and sensitivity to the green is lower.

If not mentioned previously: Do you believe that awareness is a relatively large cause / problem?

Yes, the lack of a good education and communication is always a big problem.

If not mentioned previously: Do you believe that consumers might also have a certain degree of resistance towards recycled clothes because someone else wore it before?

Attention: let's not confuse vintage clothes with the recycling process of materials. They are two different things.

What does in your eyes need to be done / changed in order to engage and involve consumers more in the sustainable fashion movement?

Educate the final consumer with a good communication and good production trying to explain why fast fashion is harmful if not controlled. And with a good education for all the people that work and study in the fashion sector.

Do you believe there should be more regulations from the government to essentially support sustainable fashion to a larger extent? If so, what kind of regulation?

No, in Italy and Europe we have strict regulation for safety production and labor protection. It would be nice if the same rules were respected all over the world. Only in this way we really talk about sustainability.

Given your experience in the industry, what would you say is the most effective marketing strategy to raise the awareness about sustainable fashion?

Forcing Companies to transform their production in sustainable production through incentivies, concessions and laws. In some big companies this is already happening.

There is a variety of recycling opportunities such as secondhand platforms, donation locations or returning the items to the company for a voucher / discount. Which one do you believe has the most potential for both consumers and sustainable businesses (and why)? Which reasons could explain the consumers resistance to make use of the different recycling opportunities?

I think that the voucher/discount is the best way for the mass consumer, not for elite consumer and Companies. The consumers are resistance to make use recycling opportunities for a cultural gap.

Do you see any problems with secondhand platforms and customers using them to sell their clothes (from a sustainable point of view)?

Vintage clothing system is different from a new sustainable production. The fashion industry will not be able to stop his production. It will have to continue to produce but with a new green rules, like a cars. The cars will be always produced but with in a electric way.

Large companies like H&M offer discounts / vouchers to customers who return used / no longer wanted fashion items to the company. Smaller companies do not really seem to apply this model. What is the main reason for that?

Because they are small Companies and the cannot apply the same marketing and business models as a big ones. They must focus on other types of services and values like a limited editions of a special product and personalized customer service.

Limited availability / designs or also higher prices are reasons for consumers to not purchase sustainable fashion. Do you believe that in the future these aspects could improve?

Improve sustainable production we can have more design and less prices in the future.

H.4. Interview with Expert D

What is the most challenging part of having a sustainable business?

Holding together the three spheres of sustainability: economic-financial, environmental and social. Producing clothing with the lowest possible impact while making a profit and being competitive.

What factors and value(s) seem to influence the consumers purchasing decision the most?

Talking about factors and values that condition the buying process is very complicated. I would say that, first of all, we have to start by separating certain areas within the fashion industry. One thing is buying a t-shirt or denim, quite another is to buy a party dress or a bag, quite another to buy everyday footwear such as trainers. Not to mention that there are several classes and categories of consumers and the average consumer does not exist in reality: it is a simple statistics. In terms of the denim product, I would definitely say: quality of the fabric and packaging, fit, comfort and durability of the garment as far as point 2 is concerned. Regarding the question of values I would emphasise the importance of the fusion between ancient, social and historical elements typical of denim, coupled with modern and technological elements that revolve around the concept of sustainability.

How can consumers contribute to sustainable fashion the most?

It may seem contradictory, but the most sustainable garment is the one you already own. Having said that, there are contexts and needs in our lives for which we may also need new garments, and the important thing is that a new garment is as sustainable as possible, of a high quality and that allows it to be used for a long time, after which it is somehow reused and put back into the production cycle in other forms. The consumer is therefore fundamental: choosing not to buy fast fashion, choosing second-hand, choosing new sustainable garments, collaborating to reuse garments that they no longer use. Consumers have the power to choose with their pockets and should be encouraged to do so.

Based on the survey responses it can be stated that Italian consumers are mostly resistant towards sustainable fashion due to limited availability, high prices and the difficulty of determining what items are actually sustainable. But also because of greenwashing from large companies and thus not knowing whether items are really sustainable – transparency is missing. Do you agree with these points or do you believe there are any other key factors why consumers do not purchase sustainable fashion?

I would say that there is now a high availability of sustainable brands and therefore the possibility to buy these garments, but the price that seems very high is something that can hold the consumer back because they are not yet aware that a low price is such because the environment or the workers are paying it. Furthermore, massive greenwashing campaigns by large corporations confuse the consumer and they lack the tools to correctly interpret sustainability in fashion.

If not mentioned previously: Do you believe that awareness is a relatively large cause / problem?

Thanks to the campaigns of various fashion associations, many consumers have discovered the environmental and social impact of the fashion industry and, in order to align their lifestyle with their values, have started to choose sustainable products for their clothes. But not enough people are aware of this yet and continue to buy fast fashion.

If not mentioned previously: Do you believe that consumers might also have a certain degree of resistance towards recycled clothes because someone else wore it before?

It depends a lot on each person, but in general the idea of "second-hand clothes" has changed a lot, just look at how many second-hand, pre-loved vintage platforms -both physical and digital- are being established, especially among the younger generations.

What does in your eyes need to be done / changed in order to engage and involve consumers more in the sustainable fashion movement?

Mass information and knowledge sharing is key to address the lack of awareness on the issue of textile sustainability. This should be done in a concerted action both by public and private organizations: the government should advocate for more conscious consumption of textiles through public campaigns and in-school teaching; the industry should respect high standards of transparency on resource-use, labor conditions etc; the role of the non-profit sector is crucial thanks to its research and information campaigns. Private-public partnership could be an interesting way to pursue a greater goal towards textile sustainability. This can be easily done through social media platforms in order to expand outreach via awareness-raising marketing campaigns.

Do you believe there should be more regulations from the government to essentially support sustainable fashion to a larger extent? If so, what kind of regulation?

I would say that greenwashing regulations are essential. In addition, industry experts are calling for a shared international standard to measure corporate sustainability with reliable, consistent and comparable parameters. Moreover, since fashion brands that embrace sustainability are often small businesses - at least in Italy - the government could grant fiscal reliefs for small businesses that reach certain sustainability standards. An example could be tax reliefs as an incentive towards sustainability.

Given your experience in the industry, what would you say is the most effective marketing strategy to raise the awareness about sustainable fashion?
To date, the best strategy to avoid greenwashing and to be perceived as a sustainable brand in terms of communication and marketing is to implement transparency and traceability campaigns: what is declared must be clear and verifiable in terms of sourcing, supply chain, production, and respect for workers and the customer.

There is a variety of recycling opportunities such as secondhand platforms, donation locations or returning the items to the company for a voucher / discount. Which one do you believe has the most potential for both consumers and sustainable businesses (and why)? Which reasons could explain the consumers resistance to make use of the different recycling opportunities?

These recycling opportunities have a different kind of target group to which they aim. For instance, location donations offer a cheaper/charge-free opportunity for second-hand clothes to people who cannot afford to pay for clothes. While vouchers or discounts from the same shop represent an opportunity for fidelity marketing, to attract clients back. This can be used both for a second-hand store and a store selling new items, while it does not make much sense to apply vouchers/coupons in charity shops. Which one is the best depends on the type of business. However, not all small businesses that sell new clothes have the possibility to recycle textiles (it requires specific machines, time, resources and knowledge), so this could be the best option to recycle the textile completely, but not all businesses have this capacity.
Consumers can be resistant to second-hand clothes for a plethora of reasons:

- for purchasing: they do not know the opportunities that exist in their local area or online; they are skeptical for hygiene reasons; they want to follow the most recent trends; they simply want to buy new.
- for selling/donating: they do not know where to donate; they find it easier to just throw old garments in the garbage. It takes time and willingness to get informed and know the various opportunities, some people cannot or do not want to do it.

Do you see any problems with secondhand platforms and customers using them to sell their clothes (from a sustainable point of view)? Some say that secondhand platforms potentially increase mass consumption as consumers are capable of easily reselling old clothing and in exchange tend to purchase more frequently new clothing items.

This is a raising concern and possibly the only way to prevent this pattern to be a habit is to continue to spread awareness about the issues of overconsumption, through transparency and information.

Large companies like H&M offer discounts / vouchers to customers who return used / no longer wanted fashion items to the company. Smaller companies do not really seem to apply this model. What is the main reason for that?

The reason is because smaller businesses often do not have the resources and the capacity to apply this model, as it is very expensive. To operate this way, the whole business model has to be focused on the recycling of garments after consumption, so also the production has to follow specific criteria (eg: do not mix many fibers together, use quality textiles), otherwise it is almost impossible to break down all the fibers a garment is made of in the recycling process. Moreover, this take-back initiative must imply, as always, transparency throughout the process to really ensure used garments are truly recycled and repurposed.

Limited availability / designs or also higher prices are reasons for consumers to not purchase sustainable fashion. Do you believe that in the future these aspects could improve?

As mentioned earlier, the most sustainable garment is the one we already own, be it from fast fashion or from sustainable fashion. The issue is not about lowering sustainable clothing items prices so that more people buy, but being conscious of what people buy. There should be a change in mindset on purchasing less, but of a greater quality, so the item will be long-lasting (also intergenerational) and it will not be harmful for our health and the Planet's health. A more intentional purchasing pattern, so people buy only what they need and can spend an extra for sustainably made garments (with all exceptions for those who do not have the privilege of this opportunity). Clearly, clothes that have higher quality, made sustainably, in an environment where human rights and labor rights are respected, are more expensive. Clothing items that are very affordable from fast fashion brands do not respect the true cost that lies behind it, as human rights are often overlooked and the environmental damage cost is not added in. In a future scenario, when the conscience of consumers and governments will be more informed, then, there will be more space for sustainable fashion brands to flourish.

H.5. Interview with Expert E

Just to have some kind of background information, can you tell me a little bit about your business? Especially also because you mentioned on your website that you are using local manufacturing which a lot of companies are still not doing.

So, I really started the company in 2017 and it took a really long time developing everything and building relationships with local seamstresses that I knew and the industry in general. I have been in the fashion industry for like 15 years so I know a lot of people. I am basically using a lot of local manufacturing of people that I have met throughout the years of working in the industry that are just kind of like doing it mostly as a side job. I just spent forever and then I finally launched an April 2020, so it was like a good long processes like making out pattern blocks and finalizing the designs and doing a photo shoot and all that stuff.

So you are not online since that long yet but mainly because the process of building up your business took quite a long time.

Yes, it took a really long time. I wanted to make sure that everything is exactly how I wanted it to be and that I did not have to compromise any of the values that I wanted to have as far as local production or sustainable materials and all that.

And what would you say is the most challenging part from having a sustainable business?

Definitely getting the transparency of everything. It is so difficult, even the fabrics and stuff. It is hard when you are small because you are buying very small units, so you cannot really work directly with the factory because they only sell things in like big bulks of like 10,000 yards and I cannot even get through 20 yards right now. So it is very difficult at the smaller level that you want it be to have some kind of fashion business, to have any level of transparency. You are working through people who work with people who work with people and it is like they do not even know where something came from. So it took a long time for the fabric sourcing and to find somebody who had a good connection with their mill. The whole industry is complicated and it is crazy to think how this stuff is still made so cheap when it goes through so many levels of people. How are any of these people actually getting paid? All the way down to the farmers, it is such a labor intensive product but people do not think about it like that. They think that machines make it or something but really it is very hands on like people labor intense.

I understand this concern as especially in the last couple of years a lot of scandals came out about large companies not paying their workers or providing fair working conditions for them.

Yes, that was a big thing and when the pandemic hit a lot of places shut down. Companies did not want inventory or could not even accept inventory and so a lot of them just did not pay for it. They asked to produce all of this stuff and then they are just like ‘Oh no we do not want it’. For majority of contracts with a factory, a lot of these bigger companies do not pay until it ships. The factories, however, already buy all the materials - they have so much invested in these huge orders and then they also have to pay all the workers to produce all the garments and then they are just sitting there because H&M or whoever was like ‘No we do not want it anymore’ are not paying for the order. It is terrible. It seems that paying people is one of the biggest issues still in this industry. It is like we are so conditioned now. Our entire generation and even our parents entire generation do not really understand the true value of clothes. We have gotten at mass manufactured since the industrial revolution and that is when basically this whole concept of slave labor and paying garment workers lower than minimum wage started. They have been taking advantage of them (the workers) ever since then. You have to really rewrite the whole narrative of the industry because people do not understand why clothes are expensive, they do not understand why a T-shirt costs more than $5. They just do not have any concept of it because they are so far removed from it. For generations and generations it was possible to be produced so cheaply, using these methods of not paying people fairly.

I also believe that everyone looks at the price. When they compare a T-shirt that costs only five Dollar and there is another one that is displayed for 40 Dollars, everyone rather goes with the five Dollar option. Maybe it looks exactly the same, so what is the point of paying more? I also agree that a lot of people do not understand why it costs more and why they should maybe rethink their fashion choice but would you say there are also other factors that seem to influence the purchasing decision of the customer?

For sure! I think a lot of marketing and also that people love to look good and they like to get compliments. Who does not? We all love fashion! It is hard because you are constantly looking for that new thing, you want to look new and fresh, you want to look different. It is that constant changing life cycle which made it difficult because now people do not really look for quality. People are not looking at your clothes and are "Oh my gosh it is so well tailored" or "The fabric is such high quality". People do not really understand those things anymore. They are like "Oh that is so cute, I love that it has ruffles on it". We really need a mindset shift.

Would you say that the social value is also the most influential or do you think it is a combination out of functional, emotional and social?

I would say probably social is the most important one as far as clothing. It is most of the time about how you represent yourself as a person, about how you choose to adorn yourself on the outside.

I was actually quite surprised by the responses that I received from the consumers. Actually not that many clicked for the trends or the looks as influential factors, they rather chose price and quality to be more important than everything else.

I am in the industry for some time already and I understand how things are made and what really is quality, what actually takes longer to produce, how things are constructed and I feel like the general population does not have a clue about all this. They might understand that some fabric is thicker or softer but that is the extent of it. I think that they mostly rely on company's marketing to determine what is quality and price points too. They think because something is more expensive it is of higher quality. Like if it is Louis Vuitton or any other designer than they believe that it is of higher quality but a lot of times they are not paying their workers well. A lot of designers like Michael Kors license out to a lot of these third party factories that are not making good quality stuff and it is the same polyester dress that you can buy at Kohl's.

What would you say is the most influential way for customers to contribute to the sustainable fashion industry?

I think that the biggest thing that they can do is just try to be mindful and aware and be ready to shift their mindset. Just be open to basically understand the entire industry and to throw everything that you think you know about it out of the window. Trust the people who are the experts and those who have the sustainable brands to reeducate you. We are doing all the research for you and we are the experts, so you do not have to do that. Basically just opening our mindset and being open for purchasing sustainable fashion. That is the main point. For some this might be very difficult because consumers do not understand why clothing is so expensive or why some things are of better quality if they look the same as a T-shirt from the discounter. It is just trying to really wrap their head around and be more conscious of everything that goes into it.

I also asked the customers what their main reasons are as to why they are not buying sustainable fashion and it turned out that the most common factors are price, limited availability and another point was that it is difficult for them to determine sustainable fashion. They question whether something is sustainable especially also because of the greenwashing of a lot of companies. Do you agree with these points? So that these factors are the main issues why customers will not purchase eco-friendly clothing?

Absolutely! It is very expensive and it is really difficult to make it in a way where it is not expensive especially in the US. We are making minimum wage in Chicago with $15.00 an hour. If it takes you 2 1/2 hours to sow a shirt, plus the materials are expensive as well because I am buying smaller quantities so it is not mass produced, then at the end of the day I need to make some money. I am not paying myself anything less just so that I can pay everyone else a favor. We have to also somehow make money to sustain our own work. It is impossible to compete with the prices of large companies. Some sustainable businesses are working with factories in India and China and they are making sure that the workers are being paid fairly but I do not know if it is actually 100% sustainable because you are still trucking everything, putting it on a boat. It is still a lot of waste which is going into the process. Those companies are still supporting those actors within a country which is making a wage that is way less than in our country. However, I am supporting everyone who's making even the smallest steps in terms of sustainability. I feel like every little step no matter how small can contribute to a better future. A lot of people are like "Oh, you are greenwashing when you do not pay your workers" but the thing that I like about companies like H&M is that they at least put it out there. They can reach the masses, they have the access to huge quantities of people and they put it in like a little seed in their mind of what sustainability is so that they can grow from that and that is hugely important.

I also agree with what you said about H&M, that they actually spread awareness. The information that I received so far is that people are just not aware and this unawareness causes them to not purchase sustainable.

The thing is that everyone you are surrounded by knows, all the blogs that you go on talk about it and then when you go out into the real world you are like "wait people do not know that". I am always blown away by the things that people still do not even know.

I totally agree with you because I know so much about it but then when I talk to other people about it they barely know anything. I can also see this in the consumer responses that I received *from the US that most of them were not aware that they might eventually bought sustainable fashion already in the past and most of them mentioned that they need more advertisement to understand what is actually going on in the industry. They are simply not aware of it. I saw on your website that in the future you want to work also with partners who make use of recycled fabrics. Do you think that this could eventually also be a resistance factor for people to not purchasing sustainable fashion?*

In the past for sure but I do think that there is a huge movement right now. A trend for up cycling and thrifting. I do think that people have definitely shifted their mindset to used fashion. I actually have partnered with this company that created an app that ties into my website so that a customer can, when they are done with whatever they purchased, sell it back to another customer on the website. It is like a built in thrift store. Basically if you wanted something and you could not afford it because of the prices being pretty high, you could wait and then when somebody goes to sell it back to the company, then you are able to purchase it at a reduced price.

Would you say that these kind of second hand platforms and other similar options help to have sustainable fashion?

Definitely! It will help because it is almost like you buy a Coach purse because you think of it as an investment. Maybe you spend $300.00 on it but you can turn it around and you can sell it again and basically make some of that money back. If you think that the item has a value, that it retains the same value, then you are more willing to pay more upfront for it.

That is true and actually a very good point! What would you say needs to be done in order to engage in the customers more in the sustainable fashion movement? You mentioned already awareness but is there anything else that you think needs to change?

Getting people more involved. I feel like as people sit down and actually try to make a T-shirt or try to sow a skirt, maybe they will actually understand what goes into it. They might have a little bit more respect for the things that people do to produce fashion. So something like workshops for consumers.

That is actually a great idea! You can read over something and five minutes later the information might already be gone, you no longer think about it but if you actually participate in an activity as you recommended, so that you perform an action, the information sticks more and transforms your mindset with a higher likelihood than if you would just read a text about the problematic. Do you also believe that there should be more coming from the government? Any regulations to support the movement? Or do you believe the actions should solely come from the customer?

I think it is kind of a combination of both. I do not know if government regulations really are the right answer because you can put warning labels on stuff but the question is: how many labels can you stick on something? I think we really need to start with just installing the values and the ethics towards the majority of the population. Even if you look at the grocery stores in the US, every single grocery store now has an organic section. Obviously we have convinced enough people that organic is better for you food wise so we can do the same thing with fashion. You need to convince enough people and bring enough awareness to them. But you also have to have some kind of regulations because otherwise company will just keep taking advantage of people over and over again. I do not know if it necessarily needs to be super detailed but I am also concerned that the companies will just find a way around it. Restriction maybe on like fishers, that they cannot dump toxic dyes into the river. Something like that. So the government should step in and be like “No you cannot physically harm people” but the rest I think should come from the consumer demanding.

And what would you say is the most effective marketing strategy for bringing out this awareness to the customers?

That was one of my struggles: figuring out how to reach people because even in social media you end up in your niches. It is hard to reach anybody outside of that but the people outside of it are the people that you actually need to educate. It is kind of difficult to figure out how to get to people. But I think social media is most effective and to just keep trying to get more people into the circle.

I saw that you have a blog as well, and I believe that this kind of advertisement can also spread the awareness.

Yes, it is almost like offering free education.

You mentioned that you make use of this secondhand option on your website and next to that there are many other opportunities for customers to recycle. Like Poshmark or donation locations like Goodwill for example. Another initiative would be returing the fashion items to the company in exchange for a voucher. What is in your opinion the most promising one for both the customer and the businesses in terms of sustainability?

The problem is that companies are making a bunch of trash clothes and then they are basically telling people “come on in and trash it and buy more trash”. All options are really helpful but I do believe that if you have a program for a quality piece of clothing where people can buy it back, that is the most ideal. So going to a thrift store and buying it back as a full garment and then second would be upcycling it into something new. Third would be like recycling because we are just not there yet technology wise to really get the most out of the recycled fiber. It still takes up a lot of energy, it still creates a lot of pollution. A lot of times you still have to put raw material with the recycled material together to be substantial enough, so I would say that this is probably the least option.

I think what you mentioned as second hand option is basically also the most convenient for the customer itself because they do not have to go out of their way. They can stay at home, take a picture, put it online and someone maybe buys it. Same when you go to thrift stores because you bring them your old clothing but at the same time you can look around and see if there is something that you would like to purchase instead. Even though the donation option was the most voted one from the US customers in my survey, I feel consumers do not get any additional *value from it except knowing that they did something for a good cause. It must be convenient for the customer.*

When you donate something it is like you have already decided in your head that it is not worth anything to you. Otherwise it would be hard to let go. You want to make sure you made value out of it.

We mentioned before the option of receiving a voucher in exchange for old clothing, but I do not really see that being offered by small businesses. On your website you mentioned that you would like to incorporate taking back old clothing until the end of 2020. What would you say is the main reason for large companies providing this offer but small companies not going with the trend?

I think they simply do not have the right partners. Bigger companies can handle that kind of quantity but it is hard for small businesses. I am working out of a studio room in my house, there is only so much space so it is more difficult for smaller businesses to make something out of that.

Right! Totally understandable. Another question that I have: Most of the US customers said that limited availability, the designs and higher prices are the reasons why they do not purchase sustainable fashion. Do you believe that in the future these aspects could improve for example through greater variety of designs or lower prices? You mentioned that everyone needs to be paid so the price increase might not necessarily be something that changes but what about availability and the variety of designs?

In order to create a new collection there is a lot of costs involved up front, like the pattern making and the fittings. So every single new collection is a huge investment. It is difficult for a small business to create a lot of new collections plus if you are going in a sustainable row you do not necessarily want to be producing like five collections a year because you are just basically pumping tons of stuff into the world. It is not really necessary. Do people really need it? I think slow fashion and less collections is kind of the way to go but I think we can also have more variety through having multiple different small businesses that all kind of focus on their own style. It is it is hard because I think people are into the one stop shopping. They just want to go to Amazon and buy this one thing very quickly. There should be a lot of sustainable marketplaces with multiple different small brands, all offered in one marketplace for lots of variety. If we could build something like a sustainable Amazon, that would be amazing!

I actually like this idea a lot! When I was looking for corporations for my thesis I found this one Instagram page which was basically a collection out of sustainable brands from Italy. That reminds me on your idea and I believe it is a great option in order to raise awareness but also to offer more variety of designs.

I think that it is definitely the best option! If we all put our efforts in this together as like one big collective and create this amazing place where somebody can go to shop and they just know everything is of good quality and ethically produced, that would be great! Nobody would have to worry about greenwashing. The customers would support a lot of different small businesses.

Another thing we could do is potentially partner with some of these bigger companies. It almost sounds like I am selling out but I do believe that if you as a small business would do a collaboration with a larger company and you could put a little collection in their line, then you would at least know that these five pieces are made actually sustainable.

During my survey I also asked the consumers what could potentially influence them to purchase sustainable fashion and 'designated areas within the stores' was a common answer. With such an area it would be easier to determine the difference between sustainable and fast fashion.

Imagining every single store having at least the sustainable section, I think that would be a good goal. Just like how every single grocery store has an organic section now, shopping should also have a sustainable section. It is definitely achievable, it can be done. It is just going to take a lot of time and effort on all of our parts but it is possible.