The consumption side of sustainable fashion: price sensitivity, value and transparency demand

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Abstract

Combining three focus groups and a survey, this research, exploratory in nature, delves into consumers' perception and consumption of sustainable fashion in Spain. We try to identify and profile the sustainable consumers, contrast their behavior with the average consumers, and determine the drivers and barriers for sustainable fashion consumption. Based on a sample of 1’063 respondents and 23 focus group participants, the results indicate that sustainable fashion consumers demonstrate greater fashion consciousness, environmental concern, perceived consumer effectiveness, and a higher subjective norm. However, the perception of 'pressure' to buy sustainably comes more from within their moral values than from their inner circle or society overall. This may indicate that Spain still lacks a strong 'sustainable culture'. It also appears that the more sustainably conscious consumers are, the less they buy brand-new, preferring alternatives as second-hand (mainly), and renting. For the average consumers, price is still a critical purchasing driver, giving preference to fast-fashion stores. Respondents indicate that lack of trust in companies and their sustainable statements is the main reason preventing them from buying sustainable products or doing it more often. This endorses and significantly adds to the literature on sustainable fashion consumer choice behavior in a flourishing market.

Keywords: sustainable fashion, sustainable fashion consumption, collaborative fashion consumption, sustainable fashion consumers, slow fashion, purchasing behavior, price sensitivity, transparency.

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1. Introduction

The fashion industry has undergone several waves of 'sustainability' awareness since the 1960s. In 1996, James A. Roberts wrote, "Once again there is renewed sensitivity toward the environment and toward social consciousness", and, since 2013, after the Rana Plaza disaster in Bangladesh in which over 1'130 fashion workers were killed, we can say again that the global concern about fashion and sustainability has reemerged. Furthermore, as Roberts (1996) assessed, the current sustainability sensitivity focuses on consumer purchase behavior, in contrast to the 1960s and 1970s, when the emphasis went mainly to political solutions.

The mass production of fashion garments has existed since the mid-nineteen centuries; however, the advent of fast-fashion in the 1970s and the globalization of markets have disrupted the pace of both fashion production and consumption. Fast-fashion relies on cheap manufacturing, frequent consumption, and short-lived garment use. The production efficiency added to the rising consumption has significantly lowered the price of clothing (Niinimäki et al., 2020). Clothing prices have risen slowly compared to other consumer goods, which has contributed to making clothing more affordable (Euromonitor, 2017; McKinsey&Company, 2016). In that sense, fast-fashion businesses have helped build up a 'throw-away culture' (Cooper, 2005), devaluing the garments' worth. Variety and quantity prepend quality, making garments increasingly disposable.

Several studies have tried to identify the socially responsible consumer in terms of demographic characteristics (see Kanchanapibul et al., 2013; Laroche et al., 2001; Roberts, 1995). Researchers agree that demographics only are not enough to explain the socially responsible consumer and that a further understanding of the consumers and their purchase decision process is needed. However, within the literature, limited research investigates the motivations driving consumers of sustainable fashion (Wiederhold and Martinez, 2018). In fact, Davies et al. (2012) note that there is minimal research observing actual buying behavior in sustainable consumption literature, questioning how much we genuinely know about sustainable consumption practice. Finally, culture and the social environment play a crucial role in a person's decision making. A cross-national study conducted by Bucic, Harris, and Aril (2012) showed that country of residence shapes decision making on sustainable products. In the present research, we have focused on the Spanish consumers and the Spanish fashion market, which have their peculiar characteristics.

Therefore, this research has the following objectives: 1) To establish what is the consumers' perception and consumption of sustainable fashion in Spain; 2) To deep into the knowledge of sustainable fashion consumers and their purchasing process, drawing a comparison with the average consumer; and 3) To define the barriers and drivers for sustainable fashion consumption (in each of its forms), further contributing to the attitude-behavior gap literature.

From here, this paper is structured as follows: first, we will revise the literature regarding sustainable fashion consumption and consumers; after that, we will explain the used methodology and, finally, we will present and discuss the obtained results.

2. Literature Review

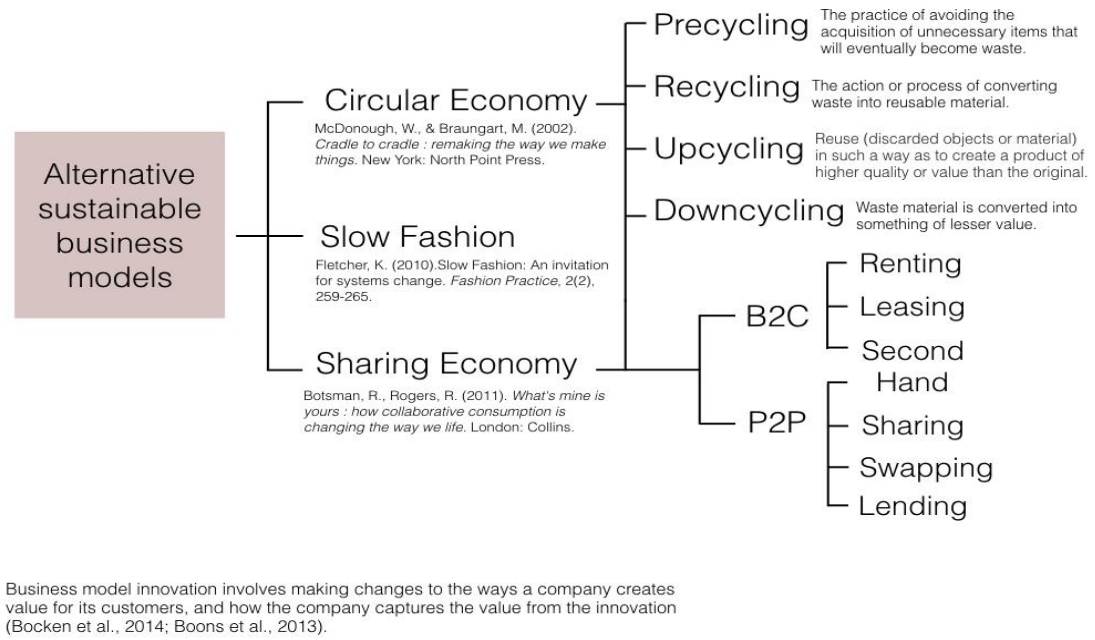
The fashion industry has been systematically pointed out as one of the most polluting sectors (Conca, 2015). The Center for Sustainable Fashion of the University of the Arts in London (2018) has cataloged the eight main issues in which the fashion industry fails to address sustainability. These issues are: 1) High levels of carbon dioxide emissions which contribute to climate change, 2) Water stress due to the high amount of water some fibers need to grow, 3) Use of hazardous chemicals and the consequent pollution of water and air, 4) The heavy use of land required to grow the fibers and the subsequent loss of biodiversity, 5) Loss of handcrafted techniques due to the rise of fast manufacturing and globalization, 6) The high amount of waste generated by overconsumption and the constant discard of fashion garments, 7) Modern-day slavery due to the absence of workers' rights in some countries in which fashion garments are manufactured, and, 8) The impoverishment of general well-being as the current level and pace of the fashion industry has compromised the well-being of workers, communities, wearers, animals, and the environment.

The mass production of fashion garments has existed since the mid-nineteen centuries; however, the advent of fast-fashion in the 1970s and the globalization of markets have disrupted the pace of both fashion production and consumption (Niinimäki et al., 2020). Fast-fashion relies on cheap manufacturing, frequent consumption, and short-lived garment use. The fashion industry's impacts include over 92 million tons of waste produced per year and 79 trillion liters of water consumed (Niinimäki et al., 2020). Global per-capita textile production, for instance, has increased from 5.9 kg to 13 kg per year over the period 1975-2018 (Peters et al., 2019). The overall increase in clothing-production demand is estimated to be 2% yearly (Fletcher, 2016). We can take the Spanish apparel company, *Zara*, as an example. It has built its strategy around consumer trends, embracing the fast-changing tastes of its customers. To do this successfully, *Zara* has developed a highly responsive supply chain that enables the delivery of new fashions as soon as a trend emerges (Petro, 2012). *Zara* delivers new products twice weekly to its 2'264 stores worldwide; this adds up to more than 11'000 new designs each year. It takes the company 10 to 15 days to go from the design stage to the sales floor. These garments are expected to be used less than ten times (Niinimäki et al., 2020; McAfee et al., 2004).

The production efficiency added to the rising consumption has significantly lowered the price of clothing. As an example, despite an increase in the number of items owned, the average per person expenditure on clothing and footwear in the EU has decreased from ≅ 30% in the 1950s to 12% in 2009 and only 5% in 2020 (Sajn, 2019; Jackson and Shaw, 2008). In fact, clothing prices have risen slowly compared to other consumer goods, which has contributed to making clothing more affordable (Euromonitor, 2017; McKinsey&Company, 2016). Low costs facilitate the culture of buying more and more frequently and wearing items for less time (Anguelov, 2015; Jackson and Shaw, 2008; Ellen MacArthur Foundation, 2017). In that sense, fast-fashion businesses have helped build up a 'throw-away culture' (Cooper, 2005), devaluing the garments' worth. Variety and quantity prepend quality, making garments increasingly disposable. Nowadays, people tend to dispose of worn and torn items because it is more convenient to buy new ones than repair them (Cooper, 2005; Laitala, 2014). According to a 2018 report released by the United Nations Economic Commission for Europe, 85% of textiles, 21 billion tons, are sent to landfills each year. Consumers are purchasing more clothes, and keeping them for half as long, driven by fast-fashion, fast marketing, and a digitally-driven thirst for newness. According to the Spanish National Institute of Statistics (INE), in Spain, 106’700 tons of textile waste ends in landfills every year (Salcedo, 2014).

In contrast, sustainable products can be defined as products that provide environmental, societal, and economic benefits while protecting public health, welfare, and the environment over their full commercial cycle (from the extraction of raw materials to final disposition), providing for the needs of future generations (Pencarelli et al., 2020). Accordingly, Mohr et al. (2001) defined socially responsible consumption as the pattern of purchasing and consuming products that maximize long-term benefits and minimize hazardous effects on consumers and societies.

For some years, the leading sustainable fashion strategy has been to produce more brand-new sustainable products. However, given the amount of clothing purchased and disposed of, this strategy may not be as efficient as expected (Becker-Leifhold and Iran, 2018). Thus, sustainable business models have become increasingly relevant for companies in the fashion industry (Kant Hvass, 2015). The current awareness of fashion and sustainability has led to new business practices and new ways of consumption. One of them is slow fashion (see Figure 1), a term introduced by Fletcher in 2007 to define a shift in the production and consumption of fashion garments from quantity to quality. Slow fashion means finding a personal style more than following mass trends. This movement was born following the path of slow food, founded in 1986 by Carlo Petrini, and as opposed to fast-fashion, which is defined by Fletcher (2010) as:



"mass-produced and standardized. The unbeatably cheap top, dress or pair of jeans, like the hamburger, is traded in large volumes, is globally ubiquitous and is homogenously served or styled".

Figure 1. Map of alternative sustainable business models.

Sharing economy (Belk, 2014) and collaborative consumption (Botsman and Rogers, 2011) are not new concepts, but they have recently come to enjoy growing popularity across different industries (Becker-Leifhold and Iran, 2018). Reusing fashion items can help reduce the need for new items and thus lead to decreased wastage. Companies in the fashion industry looking for new business models could explore collaborative consumption as a promising pathway to promote efficiency and sufficiency. Iran and Schrader (2017) defined collaborative fashion consumption as a consumption trend “in which consumers, instead of buying new fashion products, have access to already existing garments either through alternative opportunities to acquire individual ownership (gifting, swapping, or second hand) or through usage options for fashion products owned by others (sharing, lending, renting, or leasing)." The different forms of collaborative fashion consumption can be broadly categorized into two types: peer-to-peer and business-to-consumer (Iran and Schrader, 2017). Collaborative fashion consumption is a viable opportunity for the industry to close material loops, decrease its reliance on resources, reduce waste, provide product durability, extent product use time (life span).

On the consumer side, growing consumer concern about sustainability issues has been reflected in a willingness to pay higher prices for products and services provided by companies involved in social and environmental activities (Johnstone and Tan, 2015). However, despite increased awareness and concern about sustainable fashion, there has not been an evident correlation with sustainable consumption (Kong et al. 2016). Similarly, Goworek et al. (2012) pointed out that consumers' sustainable behavior depends significantly more on their habits than their knowledge of sustainable business practices. Product attributes such as price, quality, and appearance would trump ethics in making clothing decisions. Actually, it seems that we know virtually nothing about why active sustainable fashion consumers purchase sustainable fashion (Carrigan et al., 2013). Thus, consumers have a positive attitude and increasingly care about unethical behavior (e.g., Johnstone and Tan, 2015; Szmigin et al., 2009), but, frequently, this attitude does not translate into action (see Jacobs et al., 2018; Wiederhold and Martinez, 2018; Han et al., 2016; Cho et al., 2015; McNeill and Moore, 2015; Chan and Wong, 2012; Bray et al. 2011). Some researchers termed this conundrum as the Fashion Paradox (Jacobs et al., 2018; McNeill and Moore, 2015; Chan and Wong, 2012).

Several studies have tried to identify the socially responsible consumer in terms of demographic characteristics. Thus, past studies have shown that, in general, women tend to be more involved in sustainability issues and practice more often than men (Laroche et al., 2001; Roberts, 1995). Other studies have pointed out that ethical consumer is characterized by a relatively high income, education, and social status (Carrigan and Attalla, 2001; Roberts, 1996). Nowadays, it is believed that the younger generations are the most engaged in sustainable issues (Pencarelli et al., 2020; Kanchanapibul et al., 2013), but at the same time, due to their lack of purchasing power, more aged consumers may be the ones who actually behave sustainably. In any case, researchers agree that demographics only are not enough to explain the socially responsible consumer and that a further understanding of the consumers and their purchase decision process is needed. However, within the literature, limited research investigates the motivations driving consumers of sustainable fashion (Wiederhold and Martinez, 2018). Davies et al. (2012) note that there is minimal research observing actual buying behavior in sustainable consumption literature, questioning how much we genuinely know about sustainable consumption practice.

Finally, culture and the social environment play a crucial role in a person's decision making. A cross-national study conducted by Bucic, Harris, and Aril (2012) showed that country of residence shapes decision making on sustainable products. Accordingly, Carrigan and Attala (2001) pointed out the influence of demographical characteristics on sustainable purchase behavior.

In the present research, we have focused on the Spanish consumers and the Spanish fashion market, which have their peculiar characteristics. Since big retailers, such as *Zara* (and its holding group *Inditex*) or *Mango*, have their headquarters and logistics facilities in this country, Spain can be considered a fast-fashion country. *Zara* owns 2’264 stores worldwide, 406 are located in Spain, being Spain the country with more stores by person. Besides, the Spanish market offers the lowest prices in Europe. This has contributed to a consumer culture of low-prices, and consumers are mighty price-sensitive. On the other hand, according to an Ipsos survey for the World Economic Forum (2019), 76% of Spanish consumers declared that they had made changes in their everyday life to fight against climate change. A sustainable fashion market has been flourishing in the latest years, with brands as *Ecoalf* achieving international recognition, and a *Sustainable Fashion Week* has been being held in Madrid since February 2020.

3. Methodology

As a methodology, in this research, we have followed a mixed-method approach: firstly, we gathered data from three focus groups as a qualitative data collection method, and then, we triangulated that data with a survey, as a quantitative data collection method.

Since this research is exploratory in nature, focus groups are the perfect technique to conduct a preliminary exploration of an under-researched area, to sort and screen ideas as the project progresses, to explore complex behavior, or to experience a consumer's eye view of the world (Tynan and Drayton, 1988). Moreover, focus groups provide an initial set of responses that can later be tested using other large-scale methods; thus, particularly useful in mixed-methods research design (e.g., Copsey 2008; Morgan 1996), like ours.

3.1. Focus Group

Three focus groups were held in Madrid (Spain) in July 2019. The focus groups were structured as follows: group one (eight participants) and group two (nine participants) included fashion consumers who had never bought sustainable fashion. We further divided the first and second groups by age: <30 years old and ≥ 30 years old. The third focus group included consumers who usually buy sustainable fashion. Specifically, six participants, ranging from 21 to 38 years old, were recruited via *Fashion Revolution Spain*, Slow *Fashion Next*, *Humana NGO Spain*, and the *Spanish Association of Sustainable Fashion* (AMSE). The aim of the focus group session was: 1) To reveal consumption habits and shopping preferences in fashion; 2) To define the frequency and preferred channels to buy fashion; 3) To understand the knowledge of the participants regarding sustainable fashion; 4) To reveal the motivations and barriers to buy sustainable fashion, by working with two examples of sustainable fashion brands available in the Spanish market (*Ecoalf* and *ThinkingMu*); and, 5) To define the ideal qualities a sustainable fashion brand should have to satisfy the consumers' expectations.

3.1.1. Participants

In order to participate in the focus group, participants had to fill a brief questionnaire in *Google Forms* stating their age, sex, and the focus group in which they wanted to take part. As further requisites, participants for the sustainable fashion focus group had to explain their relationship with sustainable fashion. Socio-economic characteristics were not required. Table 1 depicts the demographic details of participants.

Table 1. Focus Group participants with demographics details.

Focus Group 1			**Focus Group 2**			**Focus Group 3**		
Participant	**Age**	**Sex**	**Participant**	**Age**	**Sex**	**Participant**	**Age**	**Sex**
1	26	F	9	39	M	18	38	F
2	25	F	10	42	F	19	27	F
3	24	F	11	34	F	20	28	F
4	27	F	12	58	F	21	21	F
5	27	F	13	34	F	22	25	F
6	22	F	14	43	F	23	24	M
7	25	F	15	32	M			
8	26	F	16	47	M			
			17	45	F			

3.1.2. Question Protocol

Each focus group session lasted for 90 minutes. The sessions were structured as follows (see Appendix): 1) brief introduction of the activity, 2) exploration of the consumption habits, preferences, frequency, and shopping channels, 3) knowledge of sustainable fashion, 4) evaluation of two sustainable fashion brands regarding the brand concept/philosophy, the products, the price, the selling channels, and the image projected by the brand in their web and ads, 5) final comments of the session (conclusion) and closure.

3.1.3. Data analysis

Focus groups can generate data at three different levels of analysis: the individual level, the group level, and the level of interaction: 1) The individual level of analysis allows researchers to gather multiple individual opinions simultaneously. Focus groups excel in reveling what participants think and why they think as they do (Bratton and Liatto-Katundu, 1994). It can be useful for triangulating other data. 2) The group level of analysis reveals consensus on topics of interest and can help a researcher pre-test questions to be integrated into a different data collection method. By analyzing the group level of analysis, researchers can assess whether there is a consensus on a particular topic, what the topic means for the group, and/or how the topic is discussed. 3) Focus group interactions produce unexpected ideas or insights. They can lay the groundwork for new hypotheses (Cyr, 2019).

For this research, we relied on the individual and group level of analysis. The transcription was read in full and coded using NVivo 1.0 software, a standard tool used for qualitative data analysis. An inductive approach was used, following the generic process model proposed by Mayring (2010). The content analysis followed a four-step procedure: 1) the focus groups were transcribed, 2) tone and other external cues from the researcher in site notes were added to the transcriptions, 3) the full text was analyzed by inductively identifying categories. The text was screened, searching for significant topics to code the material. NVivo was employed to facilitate the coding process and the organization and classification of the materials. 4) Categories, subcategories, and codes were identified, thus, giving structure to the data.

3.2. Survey

The survey questionnaire (see Appendix) presented four sections: 1) We explored the degree of fashion consciousness using three measures: interest in fashion, frequency of shopping, and average spending. Besides, we examined the preferred attributes in the fashion purchasing process; 2) Participants were asked a series of yes/no questions regarding their awareness and interests in sustainable fashion, and if they had previously bought sustainable fashion, second-hand, or rented a fashion item. To dig more into consumers' shopping preferences, we included a 16 items scale, developed by Jung & Jin (2014), which explores the five dimensions that account for slow fashion: equity, authenticity, functionality, localism, and exclusivity. Hassan et al. (2016) reviewed the literature on sustainable consumption and concluded that studies mostly consider environmental rather than broader sustainable concerns. Thus, the identified five dimensions clearly show that slow fashion is a broader concept than environmental sustainability alone, encompassing (1) caring for producers and local communities for sustainable life (equity and localism); (2) connoting history for the sustainable perceived value of the product (authenticity); (3) seeking diversity for the sustainable fashions world (exclusivity); and (4) maximizing product lifespan and efficiency for a sustainable environment (functionality). Respondents indicated their agreement/disagreement on a five-point Likert scale. Based on the literature review, we created a multiple-choice question with eleven choices asking consumers why they do not buy sustainable fashion at all or more often. 3) The third part consisted of four scales: Environmental Concern (EC), Subjective Norm (SN), Perceived Consumer Effectiveness (PCE), and Future Purchase Intentions (FPI), in which participants had to answer in a five-point Likert scale. 4) The last part of the survey asked for sociodemographic data: age, sex, education level, and average monthly household income.

The data collection took place in February 2020 in the form of an online survey in *Google Forms*. The research sample consisted of Spanish consumers from 16 years old, from all Spanish regions in a balanced proportion, to ensure the research sample's relevance and representativeness. The selected sample avoids the typical representativeness bias associated with convenience or student samples (e.g., Reimers et al., 2016; Roberts, 1996). Participation was voluntary; to encourage it, respondents were offered the opportunity to enter a contest of three shopping cards valued at 50€ each. We received a total of 1’074 answers; 11 were deemed not valid; hence 1’063 was the final sample size (see Table 2).

Table 2. Description of the sample.

Characteristics	Sample size (N = 1063)	Sample %
Gender		
Male	199	19
Female	864	81
Age		
16 – 18	163	15
19 – 24	373	35
25 – 34	228	21
35 – 44	111	11
45 – 54	112	11
> 54	76	7
Income (monthly household income)		
< 1000€	196	18
1000 – 1499€	252	24
1500 – 1999€	204	19
2000 – 2999€	229	22
3000 – 4999€	133	12
> 5000€	49	5
Education		
No studies or incomplete primary education	2	0
I have finished a primary education	86	8
I have finished Highschool	316	30
I have taken a professional education	157	15
I have finished a Bachelor's degree	341	32
I have finished a Master's degree	140	13
I have completed a Ph.D.	21	2

4. Results

In this section, we will present the main results from the survey blending, when appropriate, data from the focus groups. Focus groups can add qualitative "meat" to the bare-"bones" data collected via quantitative methods (Posner, 2005). The data will be presented contrasting the average consumer (AC) results with those of the sustainable fashion consumers (SFC).

4.1. Understanding the Spanish sustainable fashion market

Firstly, we examined the awareness of Spanish consumers of sustainable fashion: 90.03% of the sample declared had heard of sustainable fashion; 73% claimed to be able to define with their own words what sustainable fashion is; 74.32% professed to be interested in sustainable fashion; 39.51% assured to have bought at least once a sustainable fashion item. When questioned about why they do not buy sustainable fashion or why they do not do it more often, the most repeated answer was (see Figure 2): "because I cannot discern when a brand is really sustainable or when it just claims to be it in order to improve its image" (47.60%), followed by "because it is too expensive" (42.62%), and "because it is not available where I live" (30.57%). Only 92 consumers, 8.65% of the sample, declared to buy sustainable fashion regularly. Previous studies had pointed out the price, lack of availability, and scarce appealing designs as barriers to buying sustainable fashion; however, for the Spanish consumers, it seems that lack of credibility/trust in fashion brands is the main barrier.

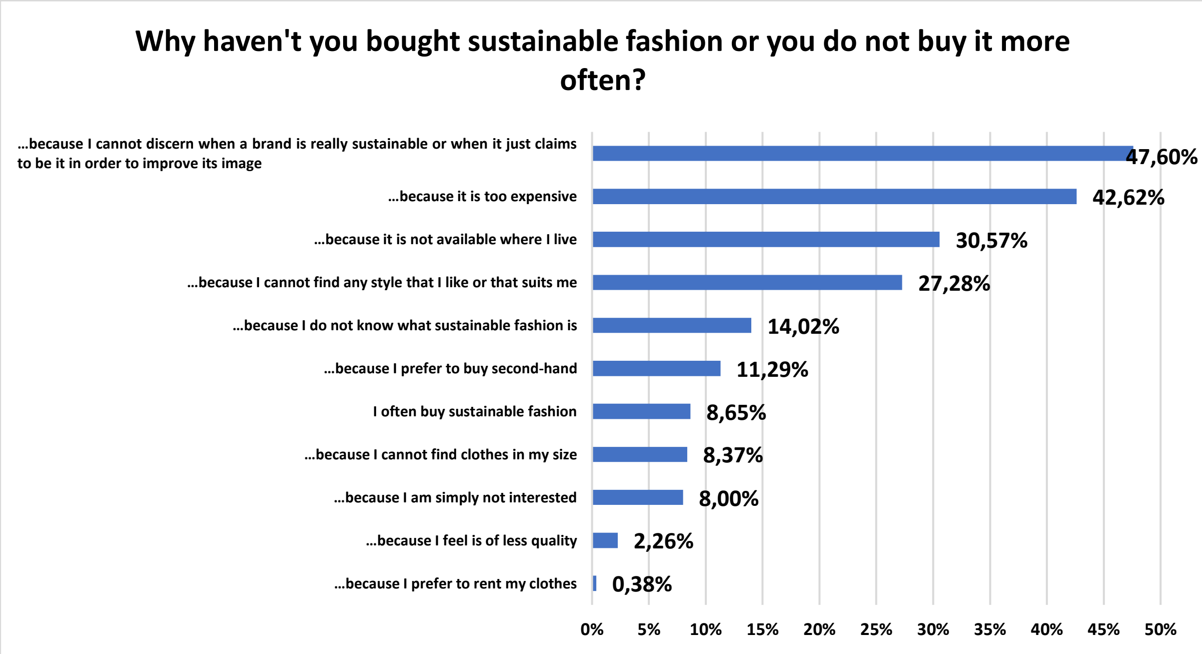


Figure 2. Frequency break-down of the answers from the question "Why haven't you bought sustainable fashion, or you do not buy it more often?" for the overall dataset.

In contrasts, for already sustainable consumers (see Figure 3), the main reasons not to buy from sustainable fashion brands are: because they prefer to buy second-hand (14.1%), because they think it is too expensive (10.9%) and because they do not trust companies' sustainability claims (9.8%). It seems that the more aware consumers are of sustainability, the less they want to buy brand new items, i.e., more sustainable consumers tend to prepend buying second-hand than buying from sustainable brands. Mainly because when buying second-hand, they can overcome all of the other reasons they claim not to buy from sustainable fashion brands: it is less expensive, they can find a wide variety of styles and qualities, and they can find clothes in their size. These same concerns had arisen during the third focus group among sustainable consumers. Demographically, the survey's sustainable fashion consumers were men and women in a balanced proportion, highly educated and mostly above 35 years old.

Figure 3. Frequency break-down of the answers from the question "Why haven't you bought sustainable fashion, or you do not buy it more often?" for the sustainable consumers.

Among the sustainable fashion brands available in Spain, *Ecoalf* is the most famous overall (see Table 3). Interestingly, for the average consumer *H&M* is seen as a sustainable brand. This can be due to the *H&M* conscious product line, although *H&M* is one of the most prominent fast-fashion brands.

Table 3: Top 5 most known sustainable fashion brands in Spain for the sustainable consumers and the average consumer.

Sustainable consumers	**Respondents (N=72)**	**%**
Ecoalf	19	20.7%
MiPoppins	4	4.3%
Sylvia Calvo	4	4.3%
Skfk	3	3.3%
Bicho bichejo	2	2.2%

Average consumers	**Respondents (N=292)**	**%**
Ecoalf	88	9.6%
Natura	19	2.0%
H&M	17	1.8%
Humana	9	0.9%
Patagonia	6	0.6%

Regarding collaborative fashion consumption (Figure 4), second-hand and renting, 85.9% of SFC declare having bought second-hand apparel, whereas, among the AC, 63.1% have bought in the second-hand market. Similarly, 62% of SFC state having sold clothes or accessories, while only 43.8% among AC. Renting is the least preferred option for both groups. Only 6.5% of respondents have once rented clothes or accessories. Thus, SFC are more willing to engage in collaborative fashion consumption, both buying and selling, but it seems that they are not yet ready to renounce the products' ownership. It can be because renting is still a fledgling business model, and it seems more convenient for special events than for daily life.

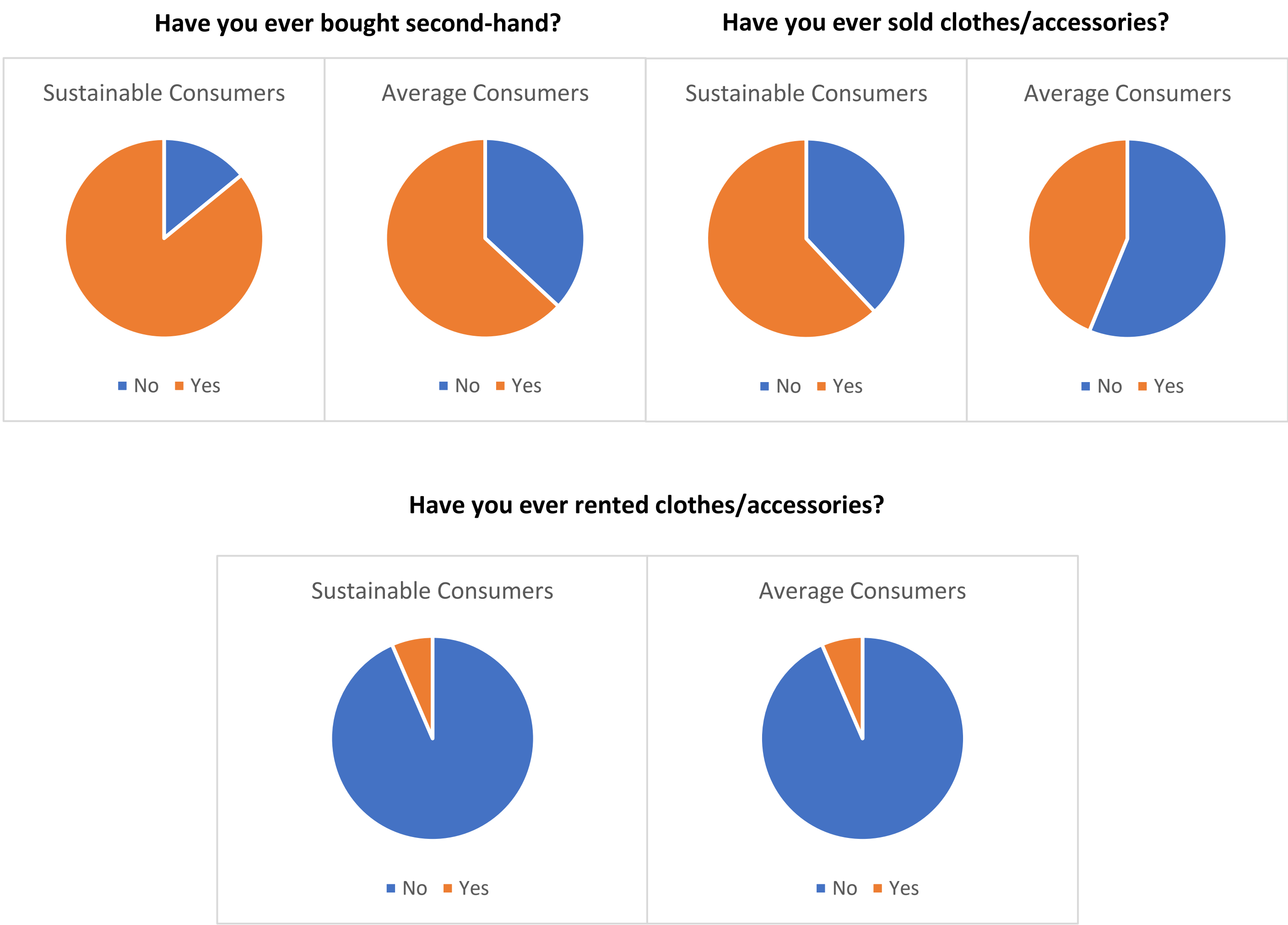


Figure 4. Collaborative fashion consumption behavior of sustainable consumers and average consumers.

4.1.1. Barriers to collaborative fashion consumption

The second-hand market was worth $24 billion in the US in 2018 versus $35 billion for fast-fashion and is expected to grow up to $64 billion in the US in value by 2028, while fast-fashion will only reach $44 billion (Handley, 2019). However, in the focus groups, we also dig into the barriers to collaborative fashion consumption (second-hand, renting, and leasing). Building on the work of Becker-Leifhold and Iran (2018), we found that the main barriers to participating in collaborative fashion consumption for the Spanish consumers are:

1) Hygiene and health concerns: as clothes are products worn close to the skin, consumers show concerns about their hygiene (Armstrong et al., 2015; Catulli, 2012). Participants' concerns appertain to the overall cleanliness of clothes: bacteria from pre-owners, the transmission of diseases, odor, and dirtiness. These concerns may have increased due to the Coronavirus crisis.
2) Consumption habits: Spanish consumers are used to low-price apparel from fast-fashion brands, and renting or leasing their clothes would dramatically change their consumption habits. In the three focus groups, consumers stated that they hate to return items, both for time costs and emotional reasons, so renting or short-term leasing is not well regarded. Renting is only seen as an option for specific events, such as weddings, or for transition periods in life, like maternity or children in the process of growing.
3) Lack of trust and information: perceived price-for-value challenges. Participants were especially skeptical about counterfeits in luxury mid-range goods and were skeptical that the product they will receive would be the same as they see in the picture while shopping online from both second B2C and P2P sites. Lack of information about the provider's guarantees and how exceptional cases such as damages and the subsequent customers' liability would be treated.
4) Lack of ownership: ownership is associated with a sense of control and social status (Hirschl et al., 2003). Catulli (2012) argued that dematerialization through sharing or renting services might negatively impact the need for self-expression. Individuals also wonder how to deal with situations in which they become attached to an item. In fact, consumers at the moment prefer buying over renting, especially if the cost of the two is the same (Armstrong et al., 2016).
5) Time costs: fast-fashion stores are around every corner, whereas second-hand stores are scarce, requiring additional commuting time. Besides, it usually takes much more time for consumers to find items in their style and size when in the store. In Spain, second-hand stores usually belong to NGOs (such as Humana, for instance). For that reason, in general, the stores differ considerably from conventional fast-fashion spaces in their ambient distribution and clothes disposition. Searching online for second-hand items or renting is also seen as a much more time-consuming task than searching in conventional brands.
6) Self-image and social-image: during the focus group, consumers of second-hand clothing stated that they hide deliberately from their friends and family that they buy second-hand apparel because they feel that they would be labeled as "poor" or "stingy." They also stated that if a coworker compliments their outfit and is indeed a second-hand item, they will avoid telling her/him. In Spain, there exists still a stigma around buying second-hand clothing, on

the one hand, for hygiene reasons, on the other hand, because it is associated with a lower social status. However, the same stigma does not exist for hands-me-down or buying second-hand clothes from other markets, such as London or Paris (were specifically mentioned). Whereas second-hand in Spain does not have a good reputation, apparel from more consolidated second-hand markets has a certain prestige. This could be due to the fact that most second-hand stores in Spain, as stated before, belong to NGOs.

7) Lack of availability: as pointed out before, the number of second-hand stores and renting services is scarce, especially out of the big cities, so potential consumers have to make an extra time effort to find what they are looking for.

4.1.2. Drivers to collaborative fashion consumption

On the other hand, we identified the main drivers of collaborative fashion consumption. Arnould and Bardhi (2005) considered that the primary motivations for purchasing second-hand clothes were functional and hedonic needs. Becker-Leifhold and Iran (2018) added biospheric needs to the list. Our research found that the main reasons for the Spanish consumers to buy second-hand were sustainability motivations and price (saving money).

1) Sustainable motives: second-hand is the preferred alternative for sustainable consumers because they can find a wide variety of styles, qualities, and sizes. They believe that by avoiding the traditional market, they are resourceful, and they have a strong desire to prevent wasteful disposal of items. This provides consumers with the opportunity to reduce excessive consumption via smart purchasing behaviors. Moreover, they know that once they are done with their items, they can resell them again in the second-hand market, thus, closing the loop. Another reason to choose second-hand over brand-new sustainable fashion brands is that they have to do less research regarding fashion's social side. Consumers, in general, have a lack of trust in companies' sustainability claims. The quote from Orsola de Castro, "the most sustainable garment is the one already in your wardrobe" is their motto so that they will prepend already made garments than brand-new.
2) Utilitarian motives: second-hand is valued as a good alternative for saving money. In fact, some focus group participants stated that they became first in touch with second-hand when they were in the midst of a personal financial crisis. In the beginning, they were skeptical, but since they did not have other options, they started buying second-hand, and now they have adopted it as a lifestyle. Second-hand is their way to go sustainable for sustainable consumers because, with sustainable fashion brands, they cannot find their sizes (especially plus sizing) or preferred styles. Additionally, the second-hand market and renting

allow consumers access to high-fashion goods that would be otherwise unaffordable (Armstrong et al., 2016; Isla, 2013). The satisfaction and pleasure of getting a good bargain and the best value for the least amount of money are also key drivers for consumers engaging in collaborative consumption (Waight, 2013).

3) Fashion motives: preference for past seasons styles or searching for a specific product. Average consumers from the ≥30yo focus group explained that a reason to go to the second-hand market was that they do not like the current trends, and in the second-hand market, they can find garments that adjust better to their taste. Others go to the second-hand market searching for a specific product from a past season that they liked, but missed the opportunity to buy.
4) Hedonic motives: mainly the hunt of bargains, as it reduces expenses and the feeling of guilt. Some consumers search for rare items that otherwise would be unattainable to them. However, the hedonic values are less relevant because, since second-hand still carries a stigma for the Spanish consumers, having found a bargain is not a reason to flaunt among peers. On the other hand, renting might trigger hedonic values because it allows the constant renewing of ones' wardrobe at a lower price and gives consumers the chance to experiment with new styles without paying full costs (Armstrong et al., 2015).

As a final note, all participants stated that they had in their wardrobes clothes that they had bought and never worn. The main reason for which they had bought those items was that they were cheap. Participants relate differently with those never-worn items: some decide to store them anyway (because they believe that maybe those fashion items will be trendy again at some point in the future), some try to sell them to other consumers or second-hand stores, some just donate them to charity/clothing recycling bins in the city. Interestingly, participants claimed that it is harder to get rid of expensive articles, and, in case of having to do so, they will first try to resell them.

4.1.3. Slow Fashion

Jung & Jin (2014) developed a 16 items scale that explores the five dimensions of slow fashion: equity, authenticity, functionality, localism, and exclusivity. We applied the scale to understand how Spanish consumers relate to slow fashion and sustainable fashion by extension. As presented in Table 4 and better represented in Figure 5, SFC scored high on all five dimensions: localism (4.23), authenticity (4.17), equity (4.15), functionality (4.11), and exclusivity (3.38). On the other hand, for the AC, functionality comes first (3.78), followed by localism (3.45), authenticity (3.11), exclusivity (2.84), and equity (2.74). "I tend to keep clothes as long as possible rather than discarding them quickly" was the statement with the highest score for both groups. Overall it seems that for the AC is more important to maximize product lifespan and efficiency, disregarding or paying less attention to the other dimensions of sustainable fashion. Equity is the least evaluated factor. Even though there have been specific campaigns targeting the fashion industry's working conditions, such as 'Who made my clothes?' by *Fashion Revolution*, this topic is yet out of the top of the consumers' minds. The same result appeared during the focus groups; when talking about sustainability, environmental issues came first, while there was a detachment towards the social side of sustainable fashion.

On the other hand, SFC scored high in all five dimensions, being the less important exclusivity. Sustainable fashion consumers demand more transparency and information on the hangtags of their clothes, indeed. To validate the social side of sustainable fashion, besides the manufacturing country and the material composition, they would like to see: 1st tier - making; 2nd tier - processing; 3rd tier - raw material suppliers.

Table 4. Five dimensions of slow fashion: mean (std).

	Sustainable consumers	Average consumers
EQUITY (Cronbach α = 0.929)	4.15 (1.06)	2.74 (1.25)
I am concerned about the working conditions of producers when I buy clothes	4.26 (1.04)	2.86 (1.23)
I am concerned about fair trade when I buy clothes	3.95 (1.10)	2.49 (1.21)
Fair compensation for apparel producers is important to me when I buy clothes	4.23 (1.02)	2.86 (1.28)
AUTHENTICITY (Cronbach α = 0.852)	4.17 (1.05)	3.11 (1.39)
Craftsmanship is very important in clothes	4.05 (1.07)	2.85 (1.34)
I value clothes made by traditional techniques	4.23 (1.02)	3.08 (1.42)
Handcrafted clothes are more valuable than mass-produced ones	4.23 (1.06)	3.41 (1.34)
FUNCTIONALITY (Cronbach α = 0.597)	4.11 (1.07)	3.78 (1.11)
I tend to keep clothes as long as possible rather than discarding them quickly	4.52 (0.73)	4.25 (0.91)
I prefer simple and classic designs	3.53 (1.12)	3.45 (1.09)
I prefer to buy less clothes, but of higher quality	4.09 (1.14)	3.39 (1.09)
I often enjoy wearing the same clothes in multiple ways	4.30 (0.97)	4.01 (1.03)
LOCALISM (Cronbach α = 0.867)	4.23 (1.01)	3.45 (1.31)
We need to support Spanish apparel brands	4.38 (0.95)	3.83 (1.36)
I prefer buying clothes made in Spain to clothes manufactured in other countries	4.11 (1.03)	3.19 (1.30)
I believe clothes made of locally produced materials are more valuable	4.19 (1.04)	3.33 (1.18)
EXCLUSIVITY (Cronbach α = 0.873)	3.48 (1.35)	2.84 (1.38)

I am very attracted to rare apparel items	3.71 (1.31)	3.10 (1.31)
Limited editions hold special appeal for me	3.17 (1.39)	2.40 (1.31)
I enjoy having clothes that others do not	3.55 (1.30)	3.02 (1.42)

Cronbach α Overall = 0.872

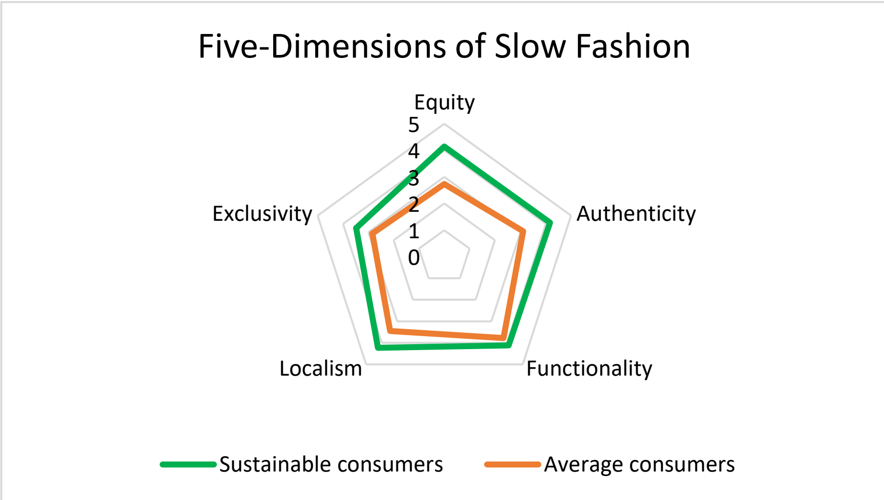


Figure 5. Mean of the five dimensions for the sustainable and average consumers.

4.2. Spanish consumers consumption habits and purchasing process

This section will examine how Spanish consumers ponder different attributes while purchasing fashion, in which stores they shop more often, and their degree of fashion consciousness, comparing the results between sustainable fashion consumers (SFC) and the average consumer (AC).

4.2.1. Preferred attributes and stores

In the decision-making process, both groups' most valued factors are fit (SFC: 4.53; AC: 4.57) and design (SFC: 4.20; AC: 4.05), as depicted in Figure 6. From there, for the AC comes price (4.04), quality (3.87), durability (3.53), easy to wash (3.07), and Made in Spain (2.69), being the least important factor "produced with sustainable materials" (2.35). In contrast, for SFC, the list of priorities continues as follows: quality (4.18), durability (4.12), produced with sustainable materials (4.00), price (3.80), easy to wash (3.50), and Made in Spain (3.43); being the least important attribute “from a prestigious brand” (2.09). Sustainable consumers value high the composition of their garments: quality, durability, and made with sustainable materials, whereas for the average consumer, price stands out as a more important attribute in the decision-making process.

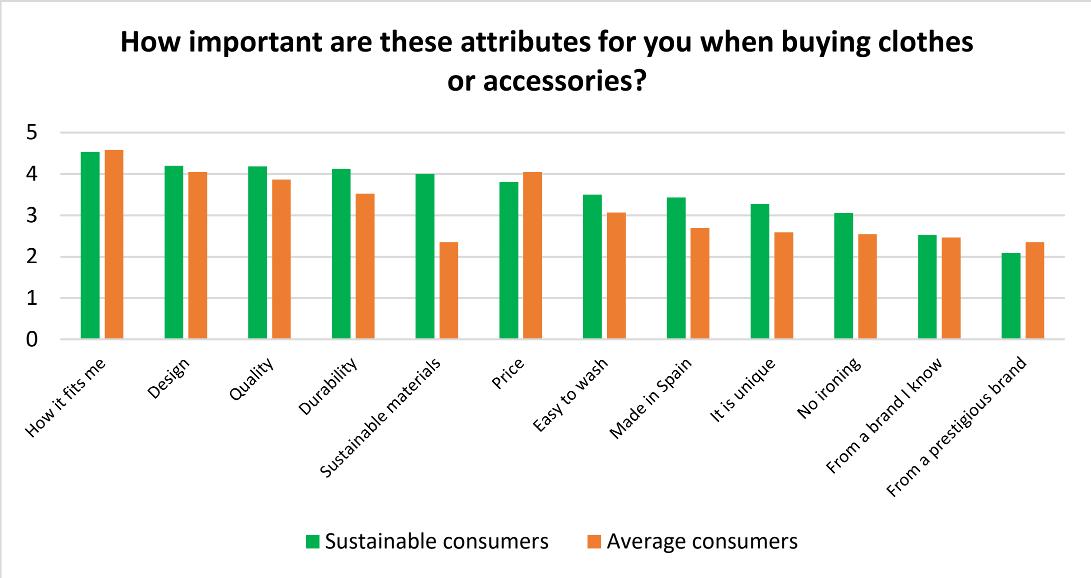


Figure 6. Comparison between sustainable and average consumers on the importance of a list of attributes while buying clothes or accessories.

When asked: Where do you buy more often? For both groups, as seen in Table 5, the preferred store is *Zara*. It can be highlighted that as a second option, SFC privilege local businesses in their neighborhood, and they also buy vintage or second-hand. Interestingly, they did not mention any sustainable fashion brand. In contrast, the average Spanish consumer predilects fast-fashion brands, those belonging to the *Inditex* group (*Zara*, *Pull&Bear*, *Stradivarius*, *Bershka*), *Mango*, and *H&M*. Another of their preferred options is the department store *El Corte Inglés*, the low-cost *Primark*, and finally, the sports-brand *Nike*. It is not surprising that *Zara* is the preferred option for both groups because it has become an emblem of Spanish fashion. Both *Zara* (and its holding group *Inditex*) and *Mango* have their headquarters and logistics facilities in Spain. Thus fast-fashion exerts a strong influence in the country.

Sustainable consumers	Respondents (N=77)	%
Zara	17	18.5%
Neighborhood shops	9	9.8%
Bershka	9	9.8%
H&M	8	8.7%
Mango	5	5.4%
Pull&Bear	5	5.4%
Vintage/Second Hand	4	4.4%
Cos	4	4.4%
Stradivarius	4	4.4%

Average consumers	Respondents (N=866)	%
Zara	339	34.9%
Pull&Bear	210	21.6%
Stradivarius	173	17.8%
Mango	143	14.7%
Bershka	129	13.3%
H&M	115	11.8%
El Corte Ingles	79	8.1%
Primark	75	7.7%
Nike	38	3.9%

Table 5: Where do you buy more often?
Preferred stores by Sustainable Fashion Consumers and the Average Consumer.

4.2.2. Fashion Consciousness

Nam et al. (2006) explain fashion consciousness as "a person's degree of involvement with the styles or fashion of clothing." An individual does not have to be either a fashion opinion leader or a fashion innovator to be considered fashion conscious. "Rather, fashion consciousness relates to a person's interest in clothing and fashion and his appearance" (Summers, 1970; Jonathan and Mills, 1982). The questions in this scale relate to cognitive, conative, and behavioral aspects of fashion, i.e., whether respondents perceive themselves to be fashionable, whether respondents are aware of/interested in fashion, and whether respondents are motivated to consume fashion. The fashion consciousness scale is divided into three subscales: 1) Overall fashion interest, in a 4 item Likert scale, 2) Average monthly spending in fashion, and 3) Purchasing Frequency.

SFC scored higher in all the four Likert scale items (see Figure 7), with an average of 3.4 against 3.0 for AC. Sustainable consumers like fashion more, search for fashion information, and talk about it with family and friends. Regarding the monthly spending (see Figure 8), SFC spend, on average 38.5€ monthly, while AC spend 30.4€. It can be highlighted that 11% of sustainable fashion consumers declared to spend more than 150€ per month. Finally, both groups of consumers predilect buying in-store than buying online (see Figure 9). Most consumers do not buy every month, and the average consumers seem to buy slightly more often than sustainable consumers.

In conclusion, SFC have a more significant fashion consciousness than AC. They are more prone to spend higher amounts of money while fashion buying and to do their own research about fashion brands and products. Sustainable fashion consumers are less price-sensitive, leaner towards style than trends, and prone to do extensive research before they buy.

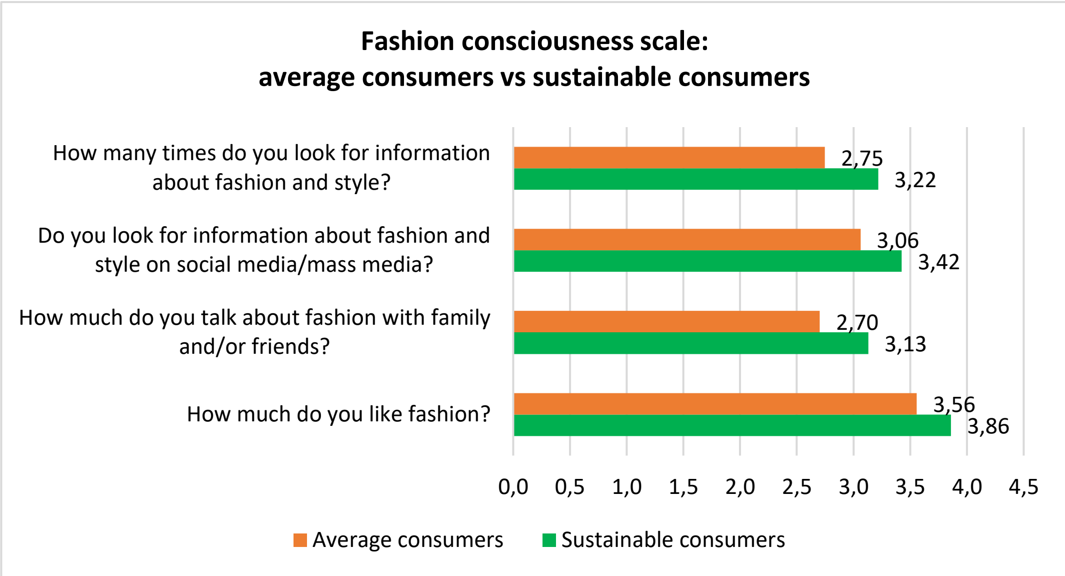


Figure 7. Fashion consciousness scale comparison between sustainable and average consumers.

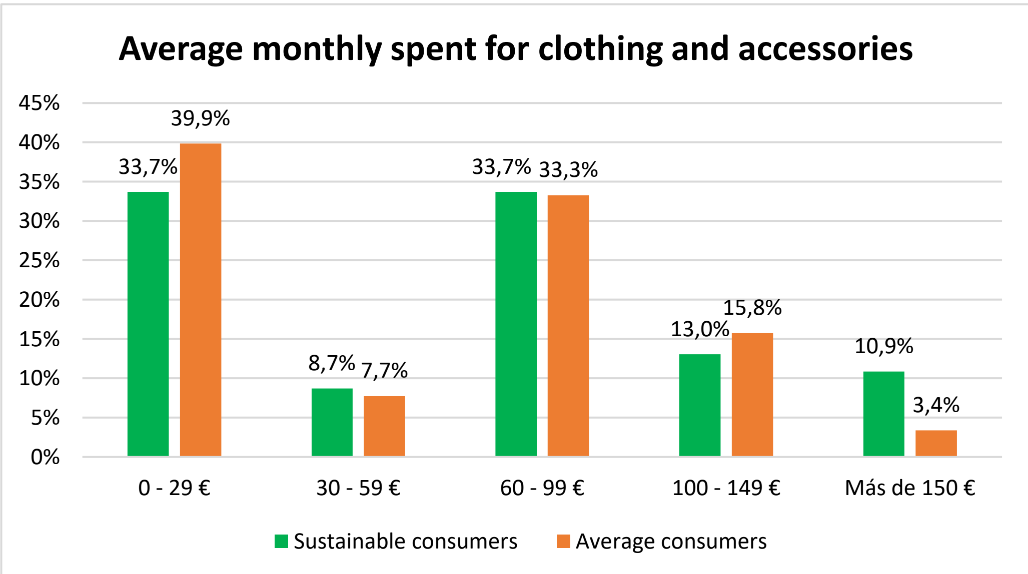


Figure 8. Comparison between sustainable and average consumers on their average monthly spent on clothing and accessories.

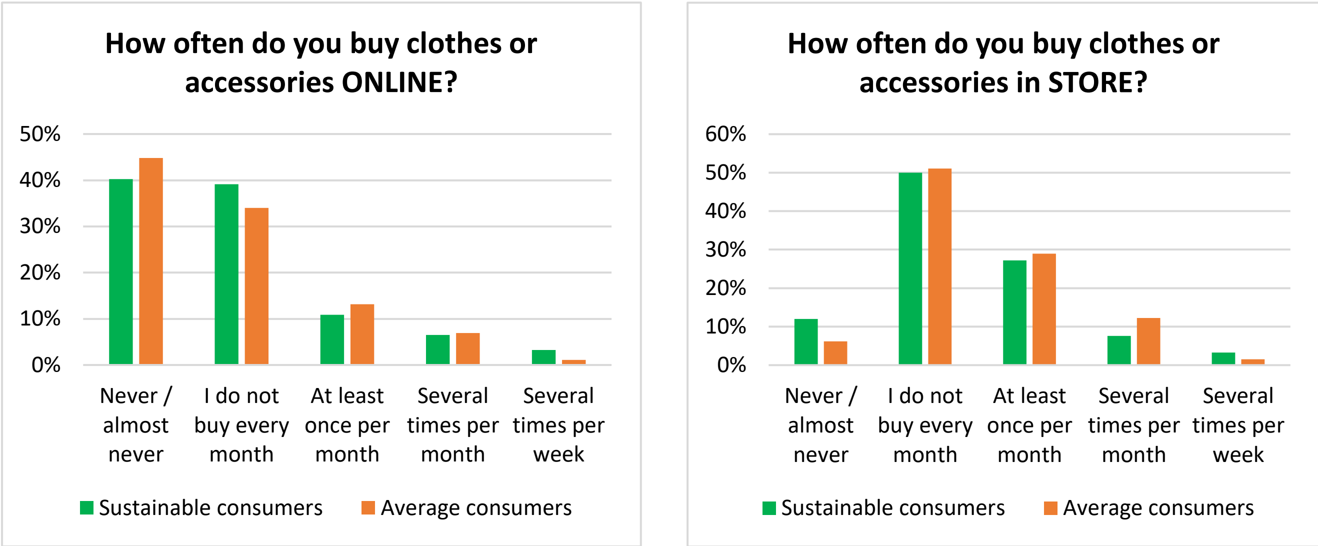


Figure 9. Comparison between sustainable and average consumers on how often they buy clothes or accessories Online (left) and In-Store (right).

4.3. Environmental Concern, Subjective Norm, Perceived Consumer Effectiveness, and Future purchase intention

In this section, we will explore to what extent Spanish consumers are concerned about the environmental crisis (Environmental Concern Scale), to what extent they perceived social pressure to act sustainably (Subjective Norm), to what extent they believe that their individual actions can have an impact (Perceived Consumer Effectiveness), and, finally, if they are willing or not to buy sustainable fashion in the future (Future Purchase Intentions Scale). We will present the results comparing sustainable consumers with the average consumer.

4.3.1. Environmental Concern

The environmental concern scale comprises six items and measures to what extent consumers are worried about the environmental conditions (Table 6). Sustainable consumers have a slightly greater concern for the environment (SFC: 4.47; AC: 4.21) and are more willing to make sacrifices to protect it (SFC: 4.67; AC: 4.09). Overall, both groups seem to have a high environmental concern, which can result from the increased coverage by mass-media outlets of environmental issues in recent years.

Table 6. Environmental Concern Scale (EC): mean (std).

	Sustainable consumers	Average consumers
Environmental concern EC (Cronbach α = 0.795)	4.47 (0.93)	4.21 (1.00)
I am worried about the environment	4.65 (0.73)	4.13 (0.91)
The conditions of the environment influence the quality of my life	4.65 (0.72)	4.05 (1.06)
I am willing to make sacrifices to protect the environment	4.67 (0.70)	4.09 (0.95)
I think it is important to protect and preserve the Earth for future generations	4.80 (0.62)	4.50 (0.85)
I think that the environmental crisis is being exaggerated*	3.88 (1.52)	4.06 (1.22)
I believe sustainability is important	4.74 (0.68)	4.41 (0.86)

4.3.2. Subjective Norm

A broad definition of subjective norm is "the perceived social pressure to perform or not to perform the behavior" in question (Ajzen, 1991). However, subjective norm is usually defined more precisely as an individual's perception or "opinion about what important others believe the individual should do" (Finlay et al., 1999), i.e., perform or not perform the behavior a specific situation. The subjective norm scale includes three items.

Sustainable consumers have a stronger perception of pressure to behave sustainably (Table 7); however, this 'pressure' comes more from within (moral obligation; 4.24) than from their close circle (family and friends; 2.78), or society (2.96). These results reflect that maybe Spain still lacks a culture of sustainability since consumers do not feel that others, friends, family, or society in general, exert pressure on them to behave more sustainably.

Both the AC and SFC strongly believe that people buy more clothes than they need.

Table 7. Subjective norm SN: mean (std).

	Sustainable consumers	Average consumers
Subjective norm SN (Cronbach α = 0.695)	3.33 (1.39)	2.51 (1.30)
I think I have a moral obligation to buy clothes/accessories made sustainably	4.24 (1.03)	3.04 (1.23)
My family and friends expect me to buy more sustainable products	2.78 (1.36)	1.89 (1.10)
Society expects me to buy more sustainable products	2.96 (1.28)	2.59 (1.30)
People usually buy more clothes than they need	4.75 (0.69)	4.56 (0.87)
I believe I am a responsible consumer	3.98 (0.99)	3.27 (1.09)

4.3.3. Perceived Consumer Effectiveness

Perceived Consumer Effectiveness or PCE is generally defined as the degree that consumers believe their behavior will effectively mitigate environmental or social problems (Roberts, 1996). As an example, if a consumer believes that their purchase of sustainable apparel will, in fact, help reduce the environmental impact of the apparel industry, then that consumer may be more likely to purchase sustainable fashion. Additionally, it has been shown that the greater the personal belief in the impact of the individual consumer, the more that individual will exhibit behaviors of energy conservation, environmentally responsible purchasing behavior, and environmentally responsible use of products (Balderjahn, 1988).

Both sustainable consumers and the average consumer, as seen in Table 8, believe that their actions do have an impact (SFC: 4.45; AC: 4.04); thus, they have high perceived consumer effectiveness. However, in the two product-specific sentences: "I believe that I can positively impact the environment if I consume products that are sustainable" and "I believe that buying sustainable clothing can help combat environmental problems", AC scored 0.63 and 0.68 less than SFC. The high conviction of sustainable consumers may explain why they are indeed sustainable consumers. In contrast, the less perceived consumer effectiveness of the average consumers of buying sustainable apparel to solve environmental problems may explain why they do not buy sustainable fashion or do not do it more often.

Table 8. Perceive Consumer Effectiveness Scale (PCE): mean (std).

	Sustainable consumers	Average consumers
Perceive Consumer Effectiveness PCE (Cronbach α = 0.756)	4.45 (1.01)	4.04 (1.13)
Unless everyone starts to change their consumption habits, it does not make sense for me to change mine*	4.35 (1.15)	4.07 (1.07)
The individual consumer can do nothing to reduce pollution*	4.33 (1.16)	3.99 (1.22)
Given that what a simple person does is not going to have any effect on pollution levels or natural resource scarcity problems, what I do will make no difference*	4.29 (1.22)	4.15 (1.10)
Each consumer's behavior can have a positive impact on society	4.62 (0.75)	4.21 (1.05)
I believe that I can have a positive impact on the environment if I consume products that are sustainable	4.58 (0.76)	3.95 (1,12)
I believe that buying sustainable clothing can help combat environmental problems	4.53 (0.90)	3.85 (1.15)

*Reverse-coded items

4.3.4. Future Purchase Intentions Scale

This scale measures consumers' intentions to purchase sustainable apparel through a two-item scale adapted from a survey by Hyllegard et al. (2012). The scale items are assessed using a 5-point Likert scale with the endpoints being "Strongly disagree" and "Strongly Agree". As seen in Table 9, SFC clearly state that they will continue to buy sustainable apparel and recommend it to their family and friends (4.43), whereas AC does not show the same level of commitment (3.53).

Table 9. Sustainable Apparel Purchase Intentions Scale (SAPI): mean (std).

	Sustainable consumers	Average consumers
Sustainable apparel purchase intentions SAPI (Cronbach α = 0.873)	4.43 (0.91)	3.53 (1.21)
In the future, I will try to buy clothes produced sustainably	4.55 (0.78)	3.65 (1.15)
In the future, I will try to convince my family and friends to buy clothes produced sustainably	4.30 (1.01)	3.41 (1.25)

5. Discussion

This research has aimed to make four key contributions to the sustainable consumption literature: 1) Exploring consumers' perception and consumption of sustainable fashion; 2) Exploring the Spanish market, considering its particular cultural and social nature; 3) Bettering the understanding of the already sustainable fashion consumers and their purchasing process; and 4) Defining the drivers and barriers for sustainable fashion consumption.

Cowe and Williams (2000) in a research in the UK, showed that 30% of consumers intended to buy sustainable products, whereas only a small fraction of 3% actually purchased them. In the present research, 74.32% of respondents professed to be interested in sustainable fashion; 39.51% assured to have bought at least once a sustainable fashion item, and only 8.65% declared to buy sustainable fashion regularly. Hence, at the present moment, it seems that consumers like the idea of sustainability, but not the market reality of it.

Sustainability seems to be the key purchasing driver for a small portion of the sample (8.65% of consumers). Sustainable fashion consumers valued high all five dimensions of slow fashion – equity, localism, exclusivity, authenticity, functionality – in their buying decision making. Besides, sustainable fashion consumers expressed a higher fashion consciousness, environmental concern, perceived subjective norm pressure, perceived consumer effectiveness, and future intention to buy and recommend sustainable fashion than the average consumers. Demographically, men and women within the group were balanced; they were highly educated and mostly above 35 years old. Whereas some researches and reports (see Pencarelli et al., 2020; McKinsey and The Business of Fashion, 2020; Kanchanapibul et al., 2013) tend to point out that the younger generations are the most interested in sustainable fashion, it seems that, in the case of Spain, the middle-age/older generations are the ones actually buying it. Companies have to do a balance exercise to attract and retain their current customers and, at the same time, seduce the next generations. In any case, it seems that the more sustainably aware consumers are, the less they tend to buy brand-new items. Sustainable consumers indicated neighborhood stores and second-hand/vintage stores among their preferred shopping outlets, but none sustainable brands were mentioned. Thus, it looks like the second-hand market, and collaborative fashion in general, are direct competitors to sustainable fashion brands.

In fact, as discussed by Becker-Leifold and Iran (2018), supporters of collaborative fashion consumption point that from a sustainability perspective, reuse decreases the environmental burden of a garment's lifecycle (Hu et al., 2014) as it ensures significant energy savings compared to the production of new garments (Bras-Klapwijk et al., 2001; Fletcher, 2008). Furthermore, reuse of clothes is beneficial because it avoids the production of new garments (Hu et al., 2014) and, thus, reduces the number of disposed of garments sent to landfills (Farrant et al., 2010; Gill et al., 2016). In the same line, Waight (2013) and Woolridge et al. (2006) sustained that reuse might even be the best consumption model for a greener economy as it reduces the environmental burden compared to buying new clothing made from virgin materials. The sharing system would still be more environment-friendly than the production of a new product, even considering the transport emissions and resources spent on the reuse model (Bostman and Rogers, 2011). However, transitioning towards sharing and ownerless fashion consumption calls for much more sweeping change in society (Mont, 2004). On the other hand, Frenken and Schor (2017) challenge the optimistic assumptions of scholars like Hu et al. (2014), Liedtke et al. (2015), Ozanne and Ballantine (2010), and Seegerbarth et al. (2016), arguing that no empirical data or lifecycle assessments have confirmed the positive effects of collaborative consumption, especially in the context of clothing. If consumers, taking advantage of the additional income generated by lower second-hand prices or sharing, start consuming more instead of less, there is the risk that the ecological benefits will be nullified or even reversed (Kathan et al., 2016).

On the other hand, the average consumers prioritize fast-fashion brands when fashion buying. The most essential attributes are fit, design, and then price. Not surprisingly, 'because it is expensive' was the second most selected barrier not to buy sustainable fashion. The average consumer appears to be mighty price-sensitive. Consumers who already buy sustainable fashion are more aware of the real price clothing should have and perceive their fashion purchases as an investment. Older consumers recall saving money for several months over two decades ago in order to purchase a good quality garment, mostly due to its high price. That made the garment a valuable item for them, and they would have tried to repair it and preserve it for as long as possible.

The question then remains for companies on how to circumvent the price obstacle. More transparency and information on the product journey from raw materials to the final product is needed. This would probably help consumers appreciate more all the work that lies behind their clothes, thus, giving more value to their garments, and probably increasing their willingness to pay for sustainable fashion. Among the five dimensions of slow fashion, equity had the lowest score, yet the average consumers scored high on the environmental concern scale. Thus, it seems that environmental issues have trumped social ones. Consumers are concerned about the environment, but lack interest in the fashion supply chain's working conditions, despite mainstream campaigns such as ‘Who made my clothes?’ by Fashion Revolution (Blanchard, 2019).

Companies are increasingly reporting their sustainability actions; however, the way they are disseminating their sustainability efforts seems to confuse consumers. 'I cannot discern when a brand is really sustainable or when it just claims to be it in order to improve its image' was the main reason respondents pointed out not to buy sustainable fashion or not do it more often. It seems to be an increasing skepticism/cynicism towards sustainability claims. Unfortunately, practices like greenwashing (see Henniger et al., 2016; Niinimäki, 2015; TerraChoice, 2009), known as a marketing technique that uses sustainable credentials intending to improve a company's image and, therefore, increasing sales, but lacking real, sustainable actions, have contributed to consumer's lack of trust. Moreover, scandals, such as Boohoo's most recent allegations about worker exploitation by a supplier in the English town of Leicester (Cernansky, 2020), might have affected consumers' trust in brands and companies’ sustainable claims. Accordingly, companies should opt for more accurate and palpable means to show how they implement sustainability actions. The garments' social side should be represented in clothing labels: 1st tier - making; 2nd tier - processing; 3rd tier - raw material suppliers. Governments, companies, and consumers have to coordinate efforts to create a more sustainable fashion system. Therefore, governments can and should play a strategic role in this respect, via (dis)incentives (e.g., taxes) and via treaties and allies at the international level.

6. Conclusions, limitations and future research

Due to the increasing trend of sustainable fashion, it becomes crucial for businesses to understand consumers' driving forces. In this paper, we have found that there is a market for sustainable fashion; however, it is still a small niche (8.65%). Sustainable consumers demonstrate greater fashion consciousness, environmental concern, perceived consumer effectiveness, and a higher subjective norm. However, the perception of 'pressure' to buy sustainably comes more from within their moral values than from their inner circle or society overall, which may indicate that Spain still lacks a strong 'sustainable culture.' It also appears that the more sustainably conscious consumers are, the less they buy brand-new, preferring alternatives as second-hand (mainly), and renting. For the average consumers, price is still a critical purchasing driver. Respondents indicate that lack of trust in companies and their sustainable statements is the main reason preventing them from buying sustainable products or doing it more often. Thus, businesses should invest in palpable actions in order to be perceived as more transparent.

This research was exploratory in nature, and the data at the moment, while insightful, still lack a more in-depth analysis and understanding. A significant limitation of this study is that the sample was skewed towards women and younger respondents.

Future research could perform a similar analysis within other countries to determine how culture influences sustainable fashion consumption.

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Appendix

A) Question Protocol Focus Groups

SCRIPT FOCUS GROUP 1

Duration: *1:30 h*

Goals of the session:

1. *To reveal consumption habits and shopping preferences in fashion.*
2. *To define the frequency and preferred channels to buy fashion.*
3. *To understand the knowledge of the participants regarding sustainable fashion.*
4. *To reveal the motivations and barriers to buying sustainable fashion by working with two examples of sustainable fashion brands available in the Spanish market.*
5. *To define the ideal qualities, a sustainable fashion brand should have to satisfy the consumers' expectations.*

Agenda of the session

1. *Introduction:* ***5 min***
2. *Consumption habits, preferences, frequency, and shopping channels:* ***25 min***
3. *Knowledge regarding sustainable fashion:* ***20 min***
4. *Evaluation of sustainable fashion brands:* ***35 min***
5. *Conclusions:* ***5 min***

INTRODUCTION (5')

Introduction of the activity:

- Introduction of the interviewer and the activity.
- Confidentiality. Recording.
- Sincere and spontaneous opinions.

CONSUMPTION HABITS, PREFERENCES, FREQUENCY, AND SHOPPING CHANNELS (25')

- Do you have a favorite fashion brand? Which ones? Why?
- How often do you buy clothes? Where do you usually buy? On store or online?
- Are you aware or do you follow the latest trends? How? Through which media? Does this affect your buying behavior?
- What is the main reason for you to buy clothes?
- When you have to buy a new garment, which factors do you consider? Which one is the most important?

- Do you think a lot before buying? Do you search for information? How/where?
- Do you look at the labels when you buy new clothes?
- How many items do you think you have in your closet approximately? How do you consider that quantity?
- Have you ever bought clothes that you have never worn?
- Have you noticed any changes in your consumption patterns in the last years?
- Have you ever bought second-hand clothes?
- What do you think about renting clothes?
- What do you do with the clothes that you do not like or wear anymore?

SUSTAINABLE FASHION (20')

- Have you ever heard about sustainable fashion? What was the context in which you heard about it?
- How would you define sustainable fashion in your own words? What comes to your mind when you think about sustainable fashion? Words, images, experiences, sounds, colors,…
- Do you know any sustainable fashion brand? In Spain?
- How would you define the type of person who buys/wears sustainable fashion?
- Are you interested in sustainable fashion? Why?
- Have you ever taken into account sustainability while buying for clothes? How?
- Have you ever bought a sustainable fashion garment? Why?

SUSTAINABLE FASHION BRANDS (35')

Suggest and work with Ecoalf and Thinking Mu.

Brand Concept/philosophy:

- How do you feel about the brand?
- Is it reliable?
- Would you buy a product of this brand?
- What do you like the most?
- What do you like the least?

Product.

- What do you think about their products?
- What could they improve in order for you to like them more?
- What do you think about the materials? Do you have any preference regarding the material of your clothes? Does it bother you if something is made out of leather or fur?
- Do you deem important the country in which the products have been made?

- Would you eventually buy any of their products? Why?
- Who do you think could like them? Describe the profile of the person.

Price.

- What do you think about the price of the products?
- What would be the fair price for you?
- What is the maximum price you would be willing to pay?

Selling channels.

- Have you ever been to one of their stores?
- Would you be willing to buy this brand if it is only available online?

Image (Web and ads)

- What do you think about the image of this brand projects?
- What do you like the most? What do you like the least?
- Can you identify yourselves with this brand? Why? How?
- Describe the kind of person they are talking to.

CONCLUSION (5')

Final comments of the session and closure.

B) Survey Questionnaire

1) Do you live in Spain?

☐ Yes
☐ No

2) Could you please indicate your county of residence?

☐ Andalucia
☐ Aragon
☐ Asturias
☐ Cantabria
☐ Castilla La Mancha
☐ Castilla y Leon
☐ Cataluña
☐ Ceuta
☐ Extremadura
☐ Galicia
☐ Islas Baleares
☐ Islas Canarias
☐ La Rioja
☐ Madrid
☐ Melilla
☐ Murcia
☐ Navarra
☐ Pais Vasco
☐ Valencia

3) Please, answer these questions: 1 means "very little", 5 means "a lot"

	1	2	3	4	5
How much do you like fashion?	○	○	○	○	○
How much do you talk about fashion with family and/or friends?	○	○	○	○	○
Do you look for information about fashion and style on social media/mass media?	○	○	○	○	○
How many times do you look for information about fashion and style?	○	○	○	○	○

4)When buying clothes or accessories, how much are these factors important for you? (1 means “a little”, 5 means “a lot”)

	1	2	3	4	5
Design	○	○	○	○	○
Price	○	○	○	○	○
Quality	○	○	○	○	○
From a brand I know	○	○	○	○	○
From a prestigious brand	○	○	○	○	○
How it fits me	○	○	○	○	○
Durability	○	○	○	○	○
Made in Spain	○	○	○	○	○
Made with sustainable materials	○	○	○	○	○
Easy to wash	○	○	○	○	○

No ironing required	⬭	⬭	⬭	⬭	⬭

5)How often do you buy clothes or accessories?

	Never/ Almost never	I do not buy every month	At least once per month	Several times per month	Several times per week
In store	⬭	⬭	⬭	⬭	⬭
Online	⬭	⬭	⬭	⬭	⬭

6)How often do you buy clothes or accessories during sales season?

	Never/ Almost never	I do not buy every month	At least once per month	Several times per month	Several times per week
In store	⬭	⬭	⬭	⬭	⬭
Online	⬭	⬭	⬭	⬭	⬭

7) In which stores or which brands do you buy more often? Write down a maximum of 3.

8)How much do you spend on average on clothes and accessories in a month?

- ☐ 0-29€
- ☐ 30-59€
- ☐ 60-99€
- ☐ 100-149€
- ☐ More than 150€

9) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
I tend to keep clothes as long as possible rather than discarding quickly	⬭	⬭	⬭	⬭	⬭
I prefer simple and classic designs	⬭	⬭	⬭	⬭	⬭
I prefer to buy less clothes and accessories	⬭	⬭	⬭	⬭	⬭
I often enjoy wearing the same clothes in multiple ways	⬭	⬭	⬭	⬭	⬭
I am very attracted to rare apparel items	⬭	⬭	⬭	⬭	⬭
Limited editions hold special appeal for me	⬭	⬭	⬭	⬭	⬭
I enjoy having clothes that others do not	⬭	⬭	⬭	⬭	⬭

10) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
I am concerned about the working conditions of producers when I buy clothes	⬭	⬭	⬭	⬭	⬭
I am concerned about fair trade when I buy clothes	⬭	⬭	⬭	⬭	⬭
Fair compensation for apparel producers is important to me when I buy clothes	⬭	⬭	⬭	⬭	⬭
Handcrafted clothes are more valuable than mass-produced ones	⬭	⬭	⬭	⬭	⬭
Craftsmanship is very important in clothes	⬭	⬭	⬭	⬭	⬭

I value clothes made by traditional techniques ⬭ ⬭ ⬭ ⬭ ⬭

11) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
I believe clothes made of locally produced materials are more valuable	⬭	⬭	⬭	⬭	⬭
I prefer buying clothes made in Spain to clothes manufactured overseas	⬭	⬭	⬭	⬭	⬭
We need to support Spanish apparel brands	⬭	⬭	⬭	⬭	⬭

12) Have you ever heard about sustainable fashion?
☐ Yes
☐ No

13) Do you think you can explain in your own words what sustainable fashion means?
☐ Yes
☐ No

14) Are you interested in sustainable fashion?
☐ Yes
☐ No

15) Do you know any sustainable fashion brand? Write down a maximum of 3.

16) Have you ever bought a sustainable fashion item?
☐ Yes
☐ No

17) Have you ever bought second-hand clothes or accessories?
☐ Yes
☐ No

18) Have you ever sold clothes or accessories?
☐ Yes
☐ No

19) Have you ever rented clothes or accessories?
☐ Yes
☐ No

20) Why haven't you bought sustainable fashion, or do you not buy it more often? (You can select multiple answers)
☐ I often buy sustainable fashion
☐ …because I do not know what sustainable fashion is
☐ …because I am simply not interested
☐ …because it is not available where I live
☐ …because it is too expensive
☐ …because I cannot find any style that I like or that suits me
☐ …because I cannot find clothes in my size
☐ …because I feel it is of less quality
☐ …because I prefer to buy second-hand
☐ …because I prefer to rent my clothes
☐ …because I cannot discern when a brand is really sustainable or when it just claims to be it or to improve its image

21) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
Unless everyone starts to change their consumption habits, it does not make sense for me to change mine	⬭	⬭	⬭	⬭	⬭

The individual consumer can do nothing to reduce pollution					
Given that what a simple person does is not going to have any effect on pollution levels or natural resource scarcity problems, what I do will make no difference					
Each consumer's behavior can have a positive impact on society					
I believe that I can have a positive impact on the environment, if I consume products that are sustainable					
I believe that buying sustainable clothing can help combat environmental problems					

22) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
I am worried about the environment					
The conditions of the environment influence the quality of my life					
I am willing to make sacrifices to protect the environment					
I think it is important to protect and preserve the Earth for future generations					
I think that the environmental crisis is being exaggerated					
I believe sustainability is important					

23) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
I think I have a moral obligation to buy clothes/accessories made sustainably					
My family and friends expect me to buy more sustainable products					
Society expects me to buy more sustainable products					

24) To what extent do you agree or disagree with the following statements? (1 strongly disagree – 5 strongly agree)

	1	2	3	4	5
In the future, I will try to buy clothes produced sustainably					
In the future, I will try to convince my family and friends to buy clothes produced sustainably					

About you

(Remember that all the data you provide is anonymous and protected by the Data Privacy Law Regulation UE, 2016/679 European Parliament and Council, 27th April 2016).

25) You are…?

☐ Male
☐ Female
☐ I prefer not to answer

26) How old are you?

☐ Between 16-18 years old
☐ Between 19-24 years old
☐ Between 25-34 years old
☐ Between 35-44 years old
☐ Between 45-54 years old
☐ More than 55 years old

27) What is the highest education level you have achieved?

☐ No studies or incomplete Primary Education
☐ I have finished a Primary Education
☐ I have finished Highschool
☐ I have taken a professional education
☐ I have finished a Bachelor's Degree
☐ I have finished a Master's Degree
☐ I have completed a Ph.D.

28) What is your average household income per month?

☐ Less than 1000€
☐ Between 1000-1499€
☐ Between 1500-1999€
☐ Between 2000-2999€
☐ Between 3000-4999€
☐ More than 5000€