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**SUSTAINABILITY IN FASHION INDUSTRY**

**Analysing consumer sentiment in sustainable fashion**

**Thesis**

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**ABSTRACT**

<b>Centria University of Applied Sciences</b>	<b>Date</b> November 2023	<b>Author</b> Rajesh Thapa, Silja Ketola-Thapa
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<p>The thesis objective was to learn about the consumer sentiment towards sustainability in the fashion industry and the role of global brands and influencers' efforts to promote it. The first part of the research's main aim is to analyse the consumer sentiment towards sustainability in the fashion industry and their harmful social and environmental impacts. In addition, the second research aim was to evaluate the influence of social media influencers on promotion and consumption of sustainable fashion.</p> <p>The theoretical background was based on different scholarly books, articles and scientific reports conducted previously on the topic of sustainability in the fashion industry and online influencer marketing. It comprises of theoretical review of topics such as sustainable fashion industry, green marketing, greenwashing, gap in attitude and behaviour, social media influencers and online influencer market. The thesis evaluated the consumer awareness towards sustainability in fashion industry as well as efforts of major fashion brands to promote sustainability through their various marketing channels.</p> <p>The thesis used the quantitative research method, using a survey questionnaire and data was collected and analysed to measure the consumer sentiment towards sustainable fashion including the online influencers' impact on consumers' sustainable purchasing habit. The survey results were analysed using pie-chart bar-graphs and tables.</p> <p>The study found out that the majority of the respondents have a good knowledge about sustainability in the fashion industry and have a willingness to incorporate them in their purchasing behaviour. However, their attitude and behavioural gap was evident and was contributed by different internal and external factors when it comes to ethical consumption. Another key finding of the study was the ever-growing online influencer market size and their strong influence on the consumers purchasing habit.</p>		
<b>Key words</b> Consumer sentiment, corporate social responsibility, fashion industry, fast fashion, influencer credibility influencer marketing, sustainability, sustainable fashion industry		

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## 1 INTRODUCTION

The fashion industry is a global business of 1.5 trillion dollars which ranks as the fifth biggest sector in the global economy and employs more than 300 million people worldwide (McKinsey 2019). This comes with a big burden on the environment, and it is considered the second most polluting sector, only second to the oil industry. The high global demand, which has a significant impact on all walks of life has pushed the industry towards unsustainability. Fashion is one of the most global and the most intimate of commodities. Its chains of sourcing, production, supply, and consumption span, unite and divide every imaginable geographical scale, from the world to the body (Crewe Louise 2008).

Sustainable fashion has become a “megatrend” recently but it is more complicated and has broader implications. Therefore, sustainable fashion is an ethical approach towards designing, sourcing, manufacturing, selling, and delivering clothing in a way that minimizes the industry’s negative impact on people and the planet along the entire value chain, Andrii Zastrozhnov (2023) describes in an article. Therefore, fashion that is sustainable and ethical can be interchanged since their ideologies overlap.

As the fashion industry has a global impact, the major stakeholders need to address the issue of sustainability. As a result, sustainability has become a priority for many fashion brands in recent years. In terms of fashion production and supply chains, the industry has shown some of the highest levels of negligence in terms of employee exploitation, social wellbeing, and the draining of the resources (Henninger et.al, 2015).

## 2 THESIS BACKGROUND

Sustainable fashion has gained significant attention from all the stakeholders in the fashion industry in the recent years prompting awareness on social and environmental impacts of the industry. A rapid shift of consumer sentiment has driven the fashion industry to correct its path quickly. According to recent studies, consumers have been showing an increasing level of “ethical concerns” about fashion consumption (Niinimäki 2010). As the fashion industry is hugely reliant on consumer demands and trends, the majority of the fashion brands are incorporating sustainable practices in their business (Bringe, Forbes 2023).

As a result of rise in consumer awareness and changing consumer behaviour, the sustainability efforts of fashion industries are visible in producing and marketing their products. As a result, green marketing has become a mainstream for the majority of the fashion brands. Polonsky (1994) describes green marketing as the activities which include exchanges of goods and services to satisfy human needs with a minimal impact on the environment.

However, recently, the fashion industry has been plagued by greenwashing. Historically and habitually, consumers tend to trust the claims of the successful companies. In Keane’s (2002, 5) study, she discusses that consumers are bombarded with terms like “sustainable” and “responsible” where companies exploit the consumer sentiment by orchestrating their self-representation with certain discourse and visual appearance. For example, fast fashion, which has a major impact on environmental and social and economic wellbeing has been promoted as sustainable from leading fashion houses. According to a study by non-profit Changing Markets (2021), nearly two thirds of sustainability labels found on thousands of clothing items from major fashion brands were unsubstantiated and misleading to consumers.

## 2.1 Thesis Objectives and Research Question

The drive towards sustainability in fashion is hugely dependent on the consumer sentiment and buying behaviour. The main aim of the thesis is to analyse the consumer sentiment towards sustainable fashion and how it impacts different brands to promote sustainability. One of the research questions is to understand to what degree customers are interested in sustainable fashion and how it impacts their purchasing habit.

Recent research has indicated the increase in the number of customers whose purchasing behaviors is considerably affected by the question of sustainability and its overall impact on the environment. According to the report published from Bain & Company along with WWF Italy, about 15% of global fashion consumers are concerned about the sustainable fashion and it is impacting their purchasing habits (Bain & Company, 2022). According to the report which examined consumer behaviors related to sustainability and fashion, approximately 5 percent said they care about the environment but very few regularly prioritize sustainability in their purchasing habit.

The second research aim of the study will analyze the role of major brands towards promoting sustainability and what steps have been taken until now to meet the growing demand of sustainable fashion. In addition, the thesis will also study the role of online fashion influencers towards sustainability. The second research question is to understand what role online fashion influencer plays in impacting consumers sustainable purchasing habit and the way they perceive brands and influencers commitment to sustainability.

To maximize the reach and capture a larger audience, major fashion brands are adopting social media influencer marketing strategy by hiring diverse influencers. According to the report from Grand View Research, the value of global fashion influencer marketing was value at USD 1.5 billion in 2019 and it is expected to expand at an annual growth rate of 35.7% from 2020 to 2027 (Grand View Research, 2020).

These changes and the demand in the consumer trends are evident in the recent marketing approach of the major global fashion houses. Fashion brands are promoting their products through online influencers, which is quickly becoming a megatrend in marketing as those influencers can influence their large following. The study will examine to what degree customers are influenced by these online influencers

and if they are promoting sustainability through their online influencing. In addition, this study tries to find if they can influence consumers to consume sustainably and ethically.

### 3 SUSTAINABLE FASHION INDUSTRY

The principle of sustainability as defined by the Brundtland World Commission on Environment and Development (United Nations 1987), is development that meets the current needs without compromising the future ones and the term ‘sustainability’ applies both to environment and the wider society. Hethorn and Ulasewicz (2008, 13) study argued sustainable fashion practices and products should be “culturally respectful, humane and economically viable” at the same time. Similarly, Henninger’s et al., (2016, 4) study described that despite the “subjectivity nature of the topic Sustainable Fashion”, transparent production process, traceable raw materials and fair social and economic outcome are the “fundamental principles” of sustainable fashion industry.

Moreover, Partridge (2011, 97-111) suggests that the topic “sustainability” is intuitively understood lacking a coherent definition. As a result, sustainability in fashion industry is situational and context dependent and might carry different meanings for different people. The emergence of slow fashion can be for example where a conscious customer countered the Fast Fashion. According to a study by Henninger, Alevizou and Oates (2016, 3) the emergence of slow fashion is a reaction to the unsustainable fashion trend. Johnston [2012] suggested that approach of sustainable fashion “utilizes upcycling, recycling, traditional production techniques, and variety of new and organic raw material” to encourage workers’ empowerment throughout the supply chain (Henninger, Alevizou & Oates 2016, 2) As an example, Stahel [2017] notes that doubling the “use-life of the clothing” will automatically reduce the production cost and waste rate by half (Niinimäki 2018, 20).

#### 3.1 Sustainable Fashion

Jung & Jin (2014, 510-519) suggested that the term ‘sustainable fashion’ first emerged when consumers became aware of the environmental impact of manufacturing in fashion in 1960s. Developed over the past decades, sustainable fashion is also known as eco-fashion, green fashion, and ethical fashion. In addition, Joergens [2006] suggests green fashion, and the popularity of ethical fashion which grew during the early 1990s is often associated with fair working conditions, organic raw material, sustainable business model and transparency (Henninger, Alevizou & Oates 2016, 2).

Moreover, slow fashion and its advocates took the backseat with the popularity of fast fashion grew alongside the rapid internet use in early 2000s. For example, majority of global fashion consumers realize the problems surrounding fast fashion when more than 1000 people lost their life in a clothing manufacturing building in Bangladesh (The New York Times 14 April 2014). Consumers became more aware of the major brands and their actions as the event was covered extensively by worldwide media.

In addition, Johnston [2012] to advocate to empower working rights throughout the supply chain, it also promotes ethical conduct and help to reduce fashion production by encouraging quality over quantity (Henninger, Alevizou & Oates 2016, 3). Furthermore, Niinimäki (2015, 3-4) believes that “ethics and values” are important to build a credible and sustainable business which can be used as a basis for making sustainable design and manufacturing and sustainable profit- making options.

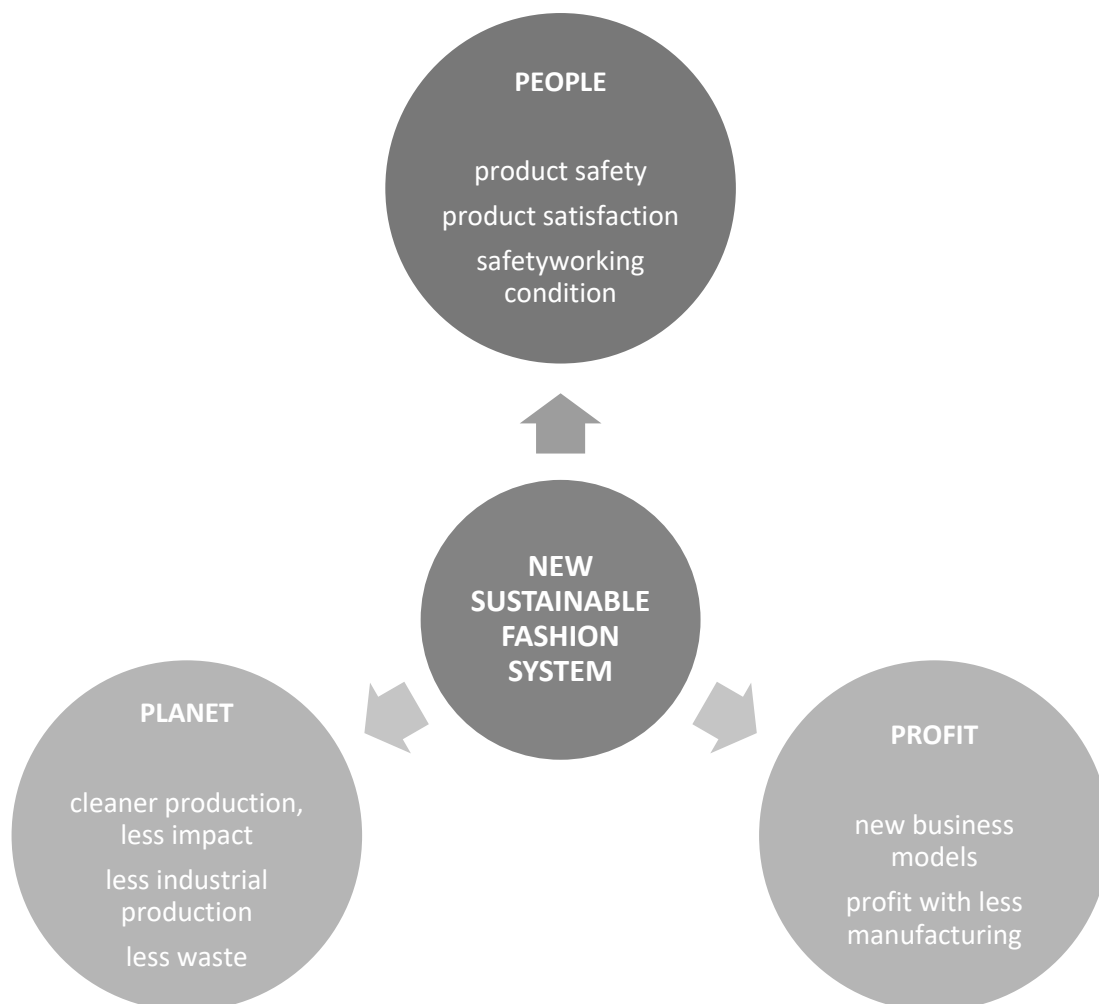


FIGURE 1. Sustainable fashion can create value to people, environment and business. (Adapted from Niinimäki 2013, 35)

As figure 1 above illustrates, people and planet benefit from this new kind of sustainable approach by creating profit-making opportunities at the same time. Thus, production and utilization of sustainable fashion can benefit all stakeholders, laying the groundwork for a sustainable fashion industry in the future (Niinimäki 2015, 2).

### 3.2 Green Marketing

The term “green marketing” first appeared in the late 1980s and early 1990s where it was discussed for the first time in a workshop organized by American Marketing Association (AMA). According to AMA (1976), green marketing is the marketing of the products that are presumed to be environmentally safe.

As the fashion industry faces significant change in consumer behavior and consumer demand, green marketing has become a phenomenon. Based on Polonsky (1994), “green marketing” refers to the strategy which focuses on generating and facilitating exchanges that empower human beings while minimizing adverse environmental effect. This phenomenon of green marketing has evolved through three phases as described as by the Peattie (2001, 129-146); ecological, environmental and sustainable green marketing respectively which span the time after early 1990s to present.

McTaggart, Findlay, and Parkin [1992, 24] suggested that the importance and relevance of green marketing is quite simple and relies on the basic concept of economics where it is the study of how people use their limited resources to try to satisfy unlimited wants (Polonsky 1994). Therefore, green marketing has emerged, proving that the market is growing for products and services that are sustainable and socially responsible.

Chen [2009] argues that the increasing awareness of the environmental impact of consumer consumption is forcing companies to include green initiatives in their marketing strategies, therefore, making it increasingly important for companies to communicate their sustainability strategy through their brand communications (Lehtinen 2021, 7).

Peattie (2001, 129-146) describes the “concept of green marketing as complex” and has moved beyond the “simple ecological posture of 20 years ago” which led to a green marketing concept that is based

on sustainability as an alternative to traditional marketing concepts that directs consumers to consume without questioning.

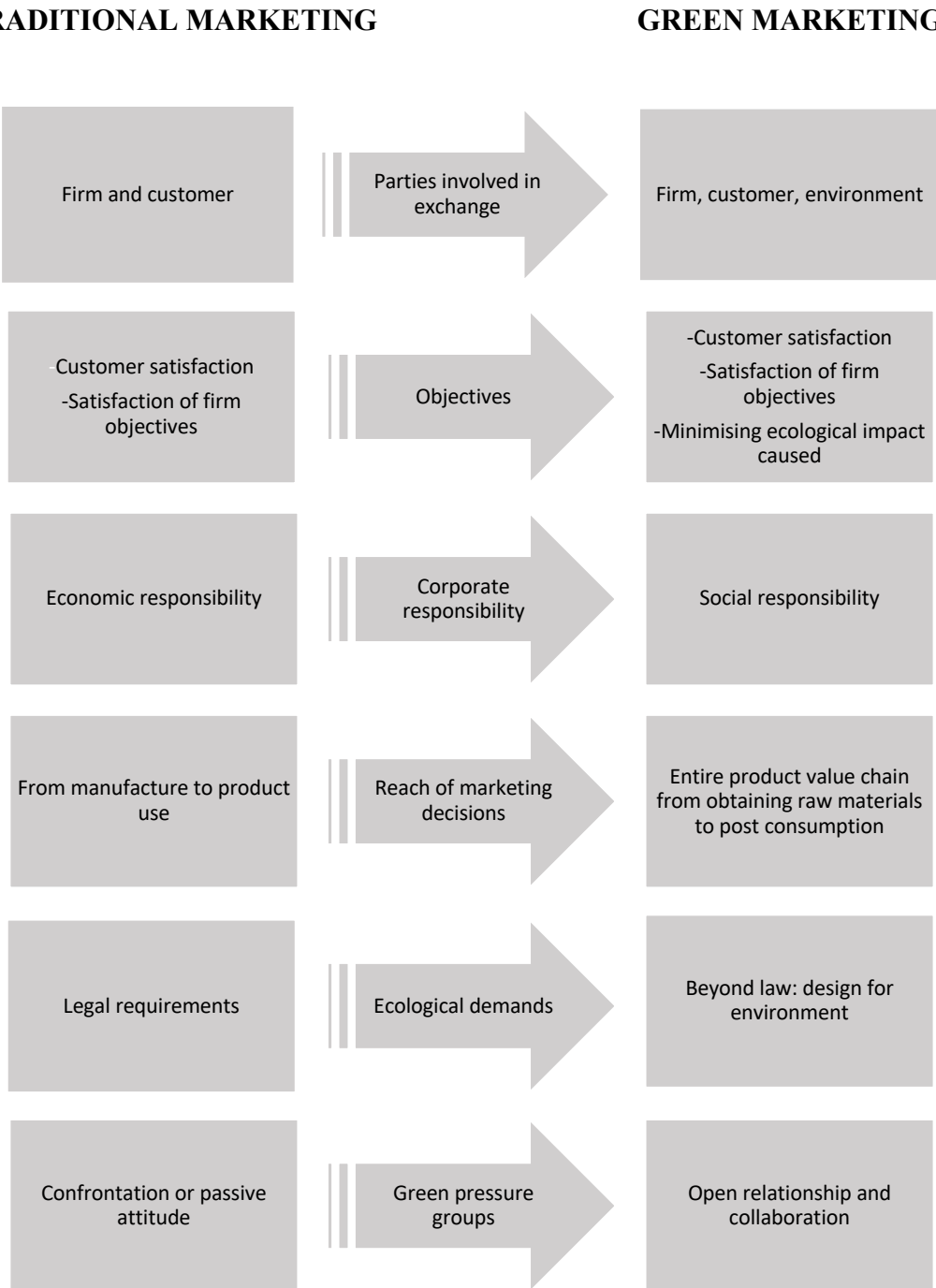


FIGURE 2. Comparison of Green Marketing to Traditional Marketing. (Adapted from Chamorro and Bañegil 2006, 13).

According to Chamorro & Bañegil (2006, 13), above Figure 2 illustrates the differences between traditional and green marketing, where “green marketing is more than just understanding commercial exchange”; it’s about understanding how an “organization reacts with society as a whole”.

### **3.3 Greenwashing and Green marketing myopia**

Greenwashing generally refers to a company’s effort to convey false or misleading information about their product’s environmental impacts. Delmas and Burbano (2011, 1), define greenwashing as “misleading of consumers regarding the company’s environmental practices or environmental benefits of their products or services”. However, according to Kim and Lyon (2015), despite increased instances of greenwashing, there is not an universally accepted definition of it. Therefore, the concept of greenwashing has been confusing and described and understood differently by different stakeholders.

The example of greenwashing in Finland can be traced back to as early as September 2022, where the Finnish consumer ombudsman assessed Fortum’s environmental marketing as a greenwashing (KKV, 2022). Similarly, one of the most cited greenwashing incidents is of Ford Motors, where its slogan “It Isn’t Easy Being Green” was accused of as being misleading. According to the Union of Concerned Scientists, Ford’s cars were found to have the highest carbon emissions and the lowest fuel efficiency among major automakers (Union of Concerned Scientist, 2014).

Greenwashing is a great risk to green marketing and sustainable marketing effort. Szabo & Webster [2020] suggests that consumers’ “perception” of brands’ environmental or product claims are impacted negatively by greenwashing, which can lead to mistrust in green overall and sustainable marketing claims in the future by these firms (Ikeda & Komis 2022, 7).

As a result of increased greenwashing, it has become a huge concern for consumers to the level that Envrio Media developed Greenwashing Index to monitor environmental claims used by manufactures (Miller 2008). In other words, overuse or misuse of “green” claims may oversaturate the market to the point where consumers may no longer trust or be aware of how green the product is.

Furthermore, according to Ottman et al., (2006, 26), “excessive greenwashing” may create a pitfall of green myopia for firms where consumers questions about the benefit of the product as green appeals

are not likely to attract mainstream consumers unless they offer desirable benefits. In addition, greenwashing makes it harder for consumers to recognize and support businesses dedicated to sustainability.

### **3.4 Fashion trends and their impacts on sustainability**

As the global fashion industry rapidly grew over the last two decades, mass production of garments alongside an increase in number of fashion seasons is causing serious issue to the sustainability. Guercini [2001] suggested that to stay competitive, fashion apparel retailers in early 1980s predicted consumer demand and fashion trends well before consumption, thus minimizing the excess production and waste afterwards. However, in recent years, fashion retailers have competed with one another by providing the latest fashion trends as quickly as possible referred to as fast fashion (Bhardwaj & Fairhust 2010, 165).

A Business Insider analysis found that fashion production contributes 10% of total global carbon emissions (Business Insider, 2019). As a result of fast fashion, consumers have access to “low-cost” and “trend-driven” fashion, which leads to production of products with shorter lifespans (Niinimäki et al, 2020, 6). And the majority of fast fashion brands promote low quality trendy clothes which are not designed to last long. As we all are aware, these fast fashion products are outsourced for manufacturing in developing countries like Bangladesh and Vietnam creating massive labour right and environment violation.

In addition to environmental implications, the global fashion industry has come under extensive scrutiny over unethical practices such as labour exploitation, low wage and even child labour in developing and under developed countries. Dimitrova (2020, 29) argues that production outsourcing to countries with lower labour costs has resulted in sweatshops, child labour, wage, and worker rights becoming “permanent issues” in the fashion industry. The fast fashion business model where competition is speed, which relies on flexibility with a short turnaround time, lower manufacturing cost has resulted in adverse social issues in many developing countries causing human right and labour right violations. Thus, according to Fulton & Lee (2013, 355), it is apparent that the fast fashion brands must incorporate “social sustainability into their business practices instead on concentrating only on financial success”.

### 3.5 Brands

The American Marketing Association (AMA) defines brand as a “term, design, symbol” or other feature identifying one seller’s good or service from another. A brand can identify as one item, a family of items, or all products sold by a particular seller. As brands are ever present in our economic, social, and cultural aspect of our life, various perspectives can be applied to brands, such as “macro-and microeconomics, sociology, anthropology, history, philosophy” and others (Kapferer 2004).

Furthermore, brands create experiences for consumers which are formed because of the relationship the customer has with the product or service. Those positive or negative consumer experiences create a certain perception of those brands in the consumer also known as brand equity. The result of a positive experience and relationship with consumers create brand visibility ultimately raising brand equity. And Keller & Lehman (2004, 740) suggest a brand becomes visible on three different levels- “customer, product, and financial” by creating and maintain monetary performance. For example, in recent years, a company’s brand can sometimes become its most valuable asset, such as Louis Vuitton and Apple.

#### 3.5.1 Brand Loyalty

Brand loyalty has been an intriguing subject for researchers resulting in substantial amount of literature. One of which, Jacoby and Chestnut [1978] in their book presented the most detailed conceptualization of brand loyalty. They refer to it as biased behavioural response expressed over time by some decision-making unit towards one or more “alternative brands” within “set of alternatives”. As a result, a strong and positive brand will therefore be preferred by customers, resulting in long lasting brand loyalty (Mellens, Dkeimpe & Steenkamp 1996, 508-511).

Furthermore, Uncles, Downing & Hammond [2003] define brand loyalty as an important concept in strategic marketing as the loyalty of consumer reduces the likelihood of consumers engaging in extended search for alternative information (Russell-Bennett & Parkinson 2015). As brand loyalty is perception-based meaning “image and experience”, where quality plays an important role in sustaining that. Thus, image and experience alongside quality create brand loyalty. Gremler & Brown, 1999; Knox, [2004] argue brand loyalty creates customers which is financially advantageous for business and

therefore Brady et al., [2008] suggest brand loyalty of customers is a major indicator of brand equity which is considered the brand's greatest asset (Russell-Bennett & Parkinson 2015, 2).

### **3.5.2 Sustainability and Brand loyalty**

In recent decades, the importance given towards sustainability effort has gained greater attention among a large section of consumers. This is the direct result of increasing consumers' awareness towards sustainability. As a result, according to Mendelson & Polonsky (1995, 4-11), consumers favour companies that practice environmental sustainability and seek eco-friendly products and services.

For companies, sustainability has evolved over the years to incorporate economic, social, and environmental dimensions based on global reality (United Nations 2017). According to D'Amato, Henderson and Florence (2009, 1), the decision-making in terms of sustainability should be the approach of companies by focusing more on environmental responsibility in their business. However, incorporating sustainable business practices in business operations takes a long time as it is self-regulatory for the firms. Therefore, a report from Bain and Company (October 21,2020) suggests the challenges facing fashion brands are threefold: addressing the information gap, engaging consumers about product durability, and making sustainable purchases easier.

Danciu [2015] suggests that consumers tend to purchase their favourite brands over green brands, but if they become more informed and committed to green values, the purchasing behaviour may change. Therefore, Chen [2010] claims companies need to improve their "green brand image", "green satisfaction" and "green trust" to maintain competitiveness in a market which is dominated by consumer demand (Kuchinka et al., 2018, 4-5).

According to the Capgemini Report (July 8, 2022), 77% of consumer products and retail organizations found that sustainability increases customer loyalty to the brand. According to the study, 87% of buyers are willing to purchase a product because its company advocated for an issue they care about. Furthermore, a consumer survey by Yotpo (2022) revealed that more than 84% of global respondents said they favoured brands that aligned with their own values. Therefore, in the long run, brands benefit from aligning their loyalty programs with the values of their shoppers (Yotpo, March 8, 2022).

### 3.6 Corporate Social Responsibility (CSR)

United Nations Industrial Development Organization (UNIDO) defines CSR as companies' commitment to social and environmental issues as part of their business operations and stakeholder relationships. Carroll (1999, 268) argues that both business and academia have been using the concept of corporate and social responsibility for over 50 years. Thus, corporate responsibility encompasses political, social, and economic considerations.

Niinimäki et al., (2020, 195) states that fast fashion thrives on short-cycle fashion products, low cost, and short turnover, all of which cause environmental damage and labour exploitation whereas the goal of sustainable fashion is to correct and mitigate the damage caused by fast fashion. Therefore, major brands are increasingly involved in promoting their corporate social responsibility in sustainability through various ad-campaigns and media outlets. For example, according to Moschetti (2019, paragraph "Fashion brands have"), the 2015 Global CSR study reported that 91% of global consumers expect companies to operate ethically while addressing social and environmental issues, and 90% would boycott if poor business practices are used.

As mentioned above about the trend, Kim & Oh (2020, 2) illustrates that major fast fashion brands like H&M and Zara have implemented textile recycling programs and introduced a sustainable line of clothes to their collection. In addition, there are more calls from several consumer groups to promote transparency throughout the supply chain. As a result, Kim & Oh (2020) suggest businesses should take these changes and efforts for sustainability an opportunity to achieve sustainability in the fashion industry (Kim & Oh 2020).

Butler [2011] suggests that many fashion brands have embraced some sort of CSR framework over the years. For example, Levi's 2008 initiated an initiative in the hope that "key stakeholders in the business are informed about how their business decisions impact environmental and social issues" (Kozlowski, Bardecki & Searcy 2012). However, there is room for improvement even after all the commitments from the major fashion brands. Despite fashion companies developing CSR policies regarding promoting and achieving sustainability, the gap still remains in integration and implementation.

There are several reasons for adaptation of CSR strategies by companies. These can be response to changing consumer demand, competitiveness, and moral obligations. As a result, Becker-Olsen,

Cudomore & Hill (2006) suggest an increase in consumer interest and CSR activities are positively correlated with financial performance. Ultimately, corporate social responsibility benefits stakeholders, the environment, and future generations in addition to financial rewards. Therefore, CSR is and will be fundamental to fashion industry operations thriving for sustainability.

## 4 CONSUMER BUYING BEHAVIOUR

Consumer buying behaviour generally refers to understanding consumer attitude, preferences regarding decision making before buying any products or services. Blackwell, Miniard & Engel (2006) argue that there is no common definition of consumer buying behaviour because it is a “complex and dynamic issue”. Therefore, different researchers have defined the concept of consumer behaviour in different ways. Analysing consumer buying behaviour is an integral part of marketing and plays a vital role in a company’s’ successes. Kotler and Keller (2001) define consumer buying behaviour as the study of ways in which “individuals, groups, and firms purchase and dispose of goods, services, ideas, or experience”.

Similarly, Stallworth (2008) defines consumer buying behaviour as a set of activities involving the act of “purchase and consumption of products and services” which results from customers “emotional and mental needs”. Engel et al (1968) developed a model of consumer decision making also known as EKB model, which describes the consumer decisions made according to the alternatives available.

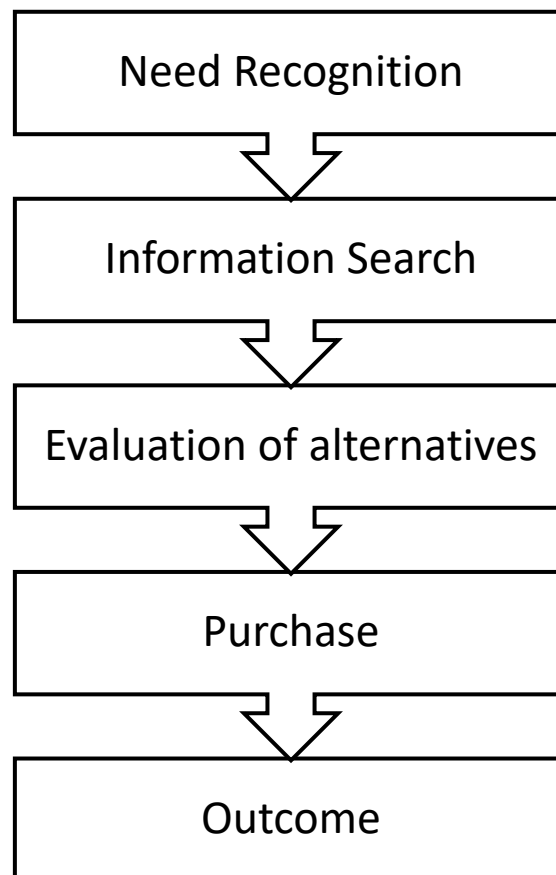


FIGURE 3. Model of consumer decision making (EKB), (Adapted from Engel et al, 1968)

The above EKB model (in figure 3) essentially proposes a sequential process of decision-making consisting of identifying the problem, searching for information, evaluating alternatives, purchasing, and evaluating the purchases after it is made. Foxall [1989] suggested that according to the model, the purchasing process consists of discrete actions usually precipitated by unfulfilled needs hence, depicting a solitary, decision-maker who accesses and sifts information to maximize utility (Hirschman 1989).

Furthermore, Chou & Chen (2021, 5) suggest an EKB model that explains how consumers seek out information and evaluate it through a conscious problem-solving and learning process. They also state that decision components and their relationships and interactions are shown in the model. Moreover, Jisana [2014] suggests, the consumer behaviour model viewed consumer behaviour as a decision process and identified five activities that occur over that time during the decision process (Chou & Chen 2021, 5).

The paradigm shift of today's internet and social media marketing was obviously not envisioned during the development of EKB model. In today's society, social media platforms play a significant role in influencing consumer behaviour and marketing roles. Instant availability and ability to gather information about the product play a significant role in shaping and influencing consumers' attitude and behaviour. According to the EKB model, consumer behaviour is massively influenced by reference groups (Figure 3). These reference group are massively present in today's social media that consumers look up to when making purchasing decisions. In addition, every stage of the decision-making process is affected by environmental factors, individual differences, and social factors. Also, a consumer's economic condition is a situational influence, whereas the environment consists of social influences, such as culture, subculture, peers, and family relationships.

#### **4.1 Sustainable buying behaviour**

McNeill & Venter [2019] suggest that the concept of sustainability has begun to attract the attention of consumers, policymakers, and retailers in the fashion industry because of criticism surrounding the industry. As a response, Diddi et al. 2019; McNeil & Venter, [2019] argue that to the perceived overconsumption of clothing, sustainable fashion addresses emerging social and environmental concerns such as pollution, energy conservation and fair-trade principles (Busalim, Fox & Lynn 2022, 2).

Fashion consumption that is sustainable is not an “antithesis” to fast fashion, but a different approach where consumers are conscious of the impact their purchases have on workers, communities, and the environment (Buslaim et al.,2022, cited Fletcher, 2007, 2). Consequently, Lundblad & Davies [2015] points out that a variety of terms and definitions are used to describe sustainability in fashion industry, which are often interchanged and applied to different contexts (Busalim et al., 2022, 5).

Thus, an increase in the awareness and subsequent studies have identified a wide range of sustainable fashion practices. For instance, in the recent years, upcycling is a trending sustainable practice which involves repurposing textiles from waste clothing to environmentally friendly new products. Therefore, Niinimäki (2015) suggests, due to consumer attitudes changing, other forms of “sustainable fashion practices” are emerging, such as renting, swapping, and buying used clothing. Additionally, the recent trends suggest that increasing numbers of “ethically committed consumers” are willing to pay more for sustainable products (Pereira et al. 2021, 8).

#### **4.2 Sustainable fashion consumption: Attitude and behaviour gap**

Ethics play an important role in the sustainable fashion consumption as it differentiates the actual behaviour to intentions. As Moisander [2007] suggests that ethical fashion consumption is a “highly complex” form of consumer behaviour, both in theory and practice, even though it seems “straightforward and unproblematic” (Crane 2016, 6). This is the result of the lack of standard criteria which makes it difficult to evaluate what constitutes an “environmentally safe” or sound product or service. This is generally due to lack of transparency where there is no available information for consumers about the production process (Crane 2016, 6 cited Moisander 2007). As Durif et al., [2011] suggest, developing more responsible habits is complicated by a lack of information, which helps to explain famous “attitude behaviour gap” (Crane 2016, 6-7).

Sustainable fashion consumption requires more ethically committed consumers who are truly concerned about sustainability. The study by Carrington et al. [2014] recommends that consumers should prioritize more “ethical purchases” and adjust their “behaviour accordingly” (Crane 2016, 7). But the recent study and surveys have shown a different picture where the gap between intention and behaviour appear. It is not unusual for consumers to say one thing but act another when it comes to ethical consumption. According to a 2009 Finnish survey, most consumers are positive and interested in ethical consumerism, but when it comes to their actual ethical consumption behaviours, 20.8% agree, whereas 57.1 disagree slightly (Koskela & Vinnari 2009).

In addition, according to Macovei (2015, 17), consumer intentions are directly affected by actual behaviour, which is influenced by “attitude and subjective norms”. Previous studies by Fishbein & Ajzen, [1980] also state that perceptions of “social norms, attitude and perceived behaviour control” are three key determinants of consumer behaviour (Macovei 2015, 17).

### **4.3 Key determinants of ethical decision making**

There have been a number of recent studies (Shaw & Shiu 2002; Shaw, Shiu & Clark 2000) who have sought to examine the ethical decision-making process. The studies revealed that consumers’ consumption and purchasing decisions are heavily influenced by “fair trade support, labour rights, environmental protections, boycotting unethical practices”. The relationship between consumers’ attitudes and purchase intentions has been studied by social psychologists and researchers using variety of attitude-behaviour model.

For example, the theory of planned behaviour by Ajzen (1991) has been used to understand ethical consumerism by different researchers with great success despite criticisms. Kang et al., [2013] argue that an individual’s behaviour can be explained by their “intention, their attitude, social norms” (such as their perception of social pressure) and the level of control they perceive over their behaviour (Martinez 2018, 420). According to the theory, purchase intentions and consumer behaviour can be predicted by planned behaviour; however, it implies that individuals act rationally (Wiederhold & Martinez 2018, 420 Kollmuss & Agyeman, [2002]).

Similarly, Blake [1999] explains behavioural models like Ajzen's (1991), individual, social, and institutional obstacles are not taken into account and in order to close the attitude-behaviour gap, it is necessary to understand the complex factors that "affect and hinder" pro-environmental and ethical behaviour (Weiderhold & Martinez 2018, 420).

Furthermore, the conceptual model of Kollmuss and Agyeman [2002] incorporates findings from empirical research on ethical behaviour from Bray et al., [2010] and the study pointed out, that ethical consumer behaviour is influenced by both external institutional, economic, social, and cultural factors and internal factors (environmental knowledge, motivation, attitude, and values) (Weiderhold, Martinez 2018, 420).

#### **4.3.1 External factors**

Among the economic factors, a study by Bray et al., [2010] suggested that the price is one of the most influential factors in purchasing decisions. As it is an established fact that ethical products tend to be more expensive and consuming ethically is cost-prohibitive which is a great hinderance on achieving ethical consumerism. Despite the fact that consumers are more likely to purchase local products, they cannot understand why cost more. As a result, consumers tend to "reject ethical alternatives" and maintain their "habitual purchasing behaviour" when "tangible benefits" are not realized (Weiderhold & Martinez 2018, 420 Bray et al., [2010]).

When it comes to the institutional factor, it is the provision of the necessary infrastructure, where the "availability" plays a significant role in consumers' buying behaviour. Kollmuss and Agyeman (2002) argue this the key to the ethical behaviour. Thus, it is the role of the society as an institution to encourage and provide consumers with products and services which are ethically produced. In the case of apparel industry, fast fashion is readily available when compared to products which are ethically and sustainably produced.

In addition, social and cultural factors also play a vital role in consumer's decision making. A study conducted by Bucic, Harris & Arli, [2012] suggests that cultures place varying degrees of significance to ethics, affecting individual values and lifestyles based on this attachment (Weiderhold & Martinez 2018, 420-421). The study compared millennials of developed Australia and developing country

which is Indonesia. The result illustrated that common factors affecting consumer purchase in Australia were price, quality and convenience. Meanwhile, millennials in Indonesia chose quality brand and convenience.

#### 4.3.2 Internal Factors

Consumer motivation to buy ethically and sustainably also influences the final purchase, even though it might involve changing purchasing plan. Due to their “attachment to specific brands and laziness”, brand loyal consumers are less likely to switch to an ethical brand. Changing consumer habits and buying ethically will be difficult if they are not concerned about where, under what condition and with what resources a product is produced.

Another important internal factor in ethical purchasing behaviour includes environmental knowledge. Awareness about ethical and environmental knowledge is important to understand the adverse effect of products consumers are consuming. Media coverage of ethical products is the primary source of background information for consumers, but “cynicism and confusion” remain (Weiderhold & Martinez, 2018, 420). The trust in the advertisement of fashion brands regarding sustainability which is in abundance can also overwhelm consumers resulting in mistrust. As Bray et al., (2010) indicate that as a result, consumers “create stereotypes of ethical and unethical” companies based on ethical claims used by companies to “justify higher prices and gain a competitive edge”.

Furthermore, Kollmuss and Agyeman’s (2012) study suggest that the relationship between attitudes and beliefs can be seen by looking at how we feel about different issues or objects around us. Kollmuss and Agyeman [2012] incorporates the model in their study suggested by Dikemann & Preisendoerfer (1992) according to which acting ethically requires the least amount of effort and time, so people behave environmentally friendly when it costs the least. Furthermore, the lack to time for consumers to know about the product’s origin and process also leads to not consuming ethical products as it requires effort and time which is not always convenient for all consumers (Weiderhold & Martinez 2018, 422).

## 5 INFLUENCER MARKETING IN FASHION INDUSTRY

Nielsen's latest global trust in advertising report which surveyed more than 28,000 internet users across 56 countries, revealed that 92% of consumers believe in earned media, such as recommendation from family and friends (Nielsen, 2012). In social media, earn media refers to posts that do not directly originate from a company, rather than someone who has influence over the brand, like "influencers". These influencers sole job is to influence consumers' brand attitude. This is the indication of traditional cable tv losing the fight to the new streaming services such as Netflix, YouTube and social media platforms like TikTok and Instagram. As the number of traditional cable television viewer is declining (Chulkov 2015), social media is flooded with fashion brands filled with influencer marketers targeting the target audiences.

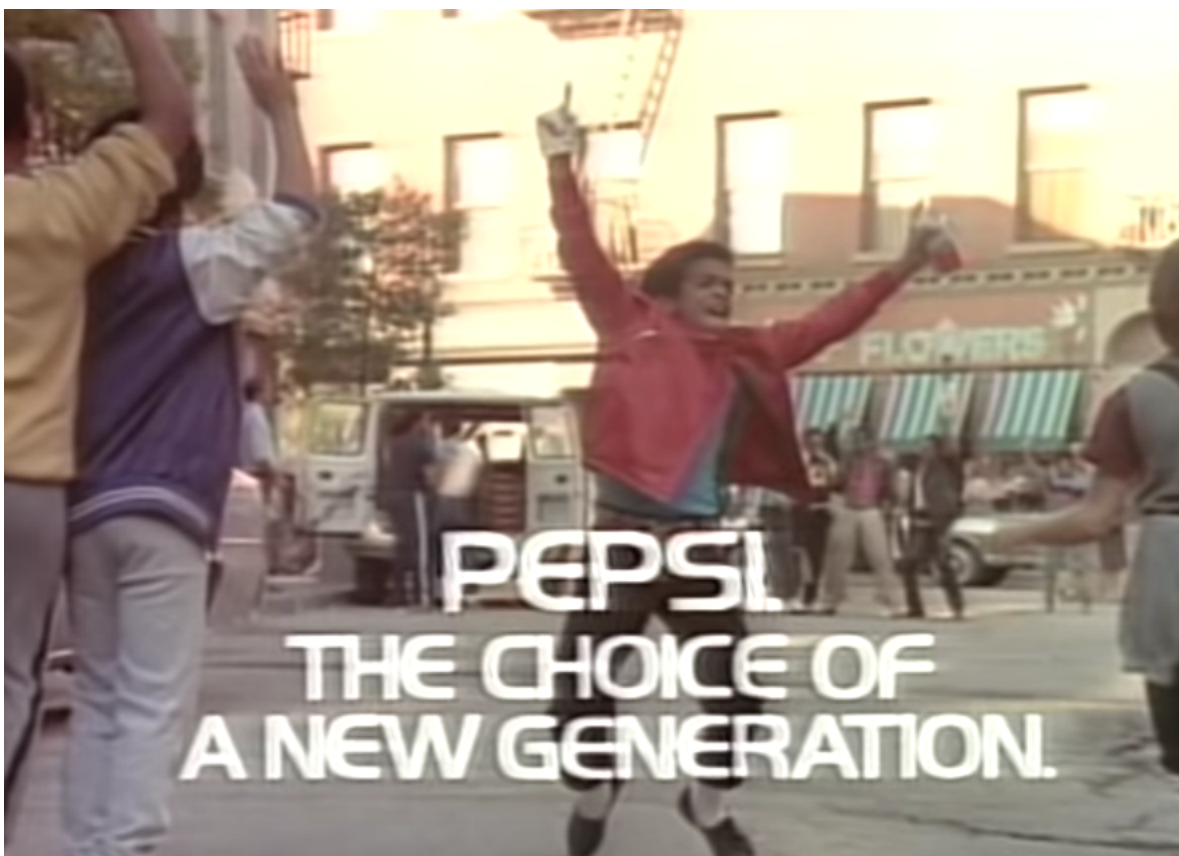
### 5.1 History



PICTURE 1. Coca Cola Advertisement 1932

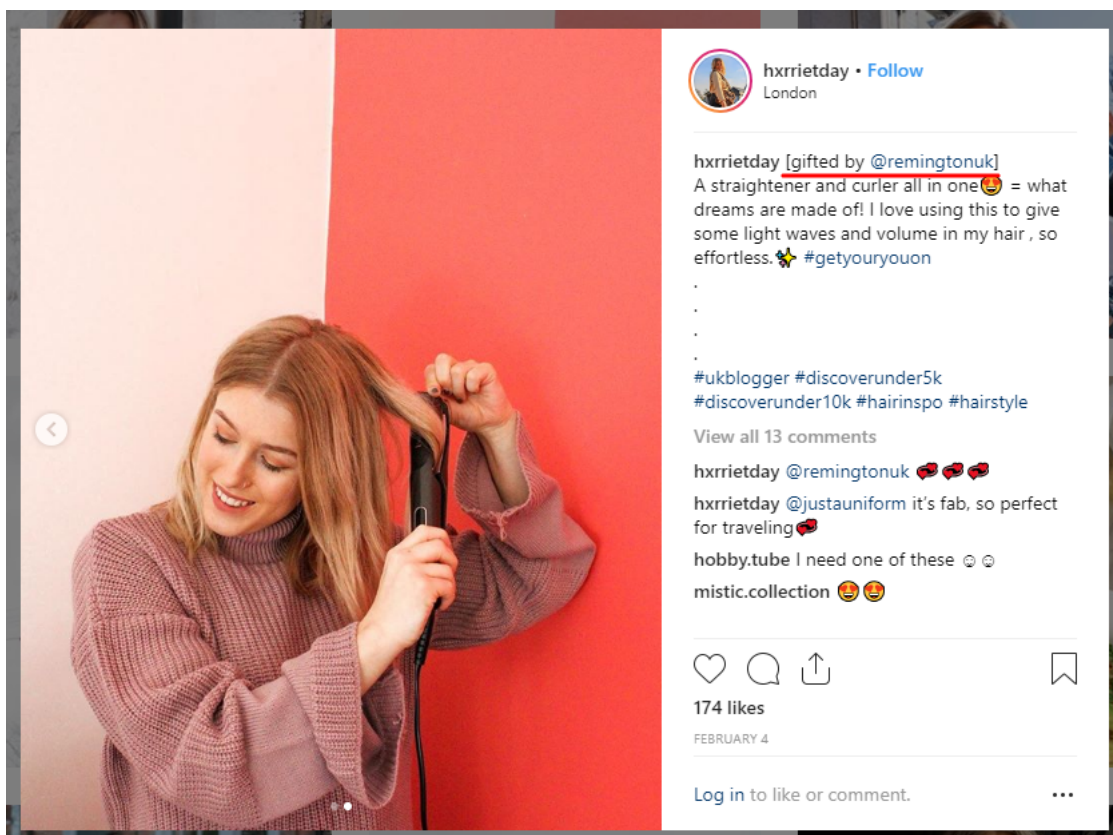
In the modern history, Coca Cola took the influential marketing to another level in 1932 by introducing Santa Claus in their marketing campaign (Aspire 2023). Coca Cola used Santa Claus as sentiment and spokesperson to influence people known today as influencer marketing. The advertisement campaign was a trailblazer and opened the door for influencer marketing where it emphasised the fact that if people adore the person promoting the product, they will love the product too.

The era of influencer marketing took a turn in 1980s when celebrity endorsement was opted by most of the brands. In the absence of the social media of today, advertisement took place in television, magazine, and billboards (Moore 2022) where Pepsi made Michael Jackson the centrepiece of its 'new generation' campaign (Figure 2). The goal of the campaign was to portray "Pepsi look Young and Coke look old", and it had a profound effect for the next decade. The celebrity marketing helped brands increase sales in the short term and brand awareness in the long term.



PICTURE 2: Pepsi commercial featuring Michael Jackson, 1984. (PepsiCo).

Influencer marketing today peaked in the late 2010s as almost every brand with social media presence adopted some kind of influencer marketing (Example, Picture 3). Evans et al., [2017] suggest that by using authentic, brand- aligned influencers to endorse products, it has proven time and time again that it is the most effective way for a brand to build trust in its products and services (Belanche et al., 2021). This indicates the shift away from the celebrity endorsement in the recent history. As a result, by partnering with nano and micro influencers, brands can target “specific audiences” and gain access to a smaller, but more engaged audience than they would do with celebrity endorsement (Belanche et al., 2021, Chapter 2).



PICTURE 3. Example of Micro Influencer. (Instagram @hxrrieday)

## 5.2 Theoretical background

In the light of the fact that influencers are considered a highly credible source of information, their influence can directly influence the purchasing decisions of their audiences and followers. De Veirman et al., [2017] explain that due to their popular status and perceived status as trusted tastemaker in a

niche or several niches, audiences relate to them and consider them as “one of their own” (Belanche et al., 2021, Chapter 2).

Sammis et.al, in their book *Influencer Marketing for Dummies* (2015), describe influencer marketing as raising “brand awareness through sponsored content by engaging influential people” online. Historically, advertisers have always used celebrity endorsement to improve the perception of their brands as people tend to trust and follow people, they admire making it very similar to the influencer marketing of today.

Today, according to Statista (2022), Instagram ranks among the most downloaded apps with more than one billion active users. The market size of influencer marketing has more than doubled from year 2020 to 2023 (Statista 2023, Figure 4). In order to benefit from high engagement rates among a wide audience, many brands establish accounts on popular sites like Instagram (Hsu & Lin 2020). Although, all brands from different sites are present in social media, fashion brands in particular have maximized their presence along with influencers (#Hashoff 2017).

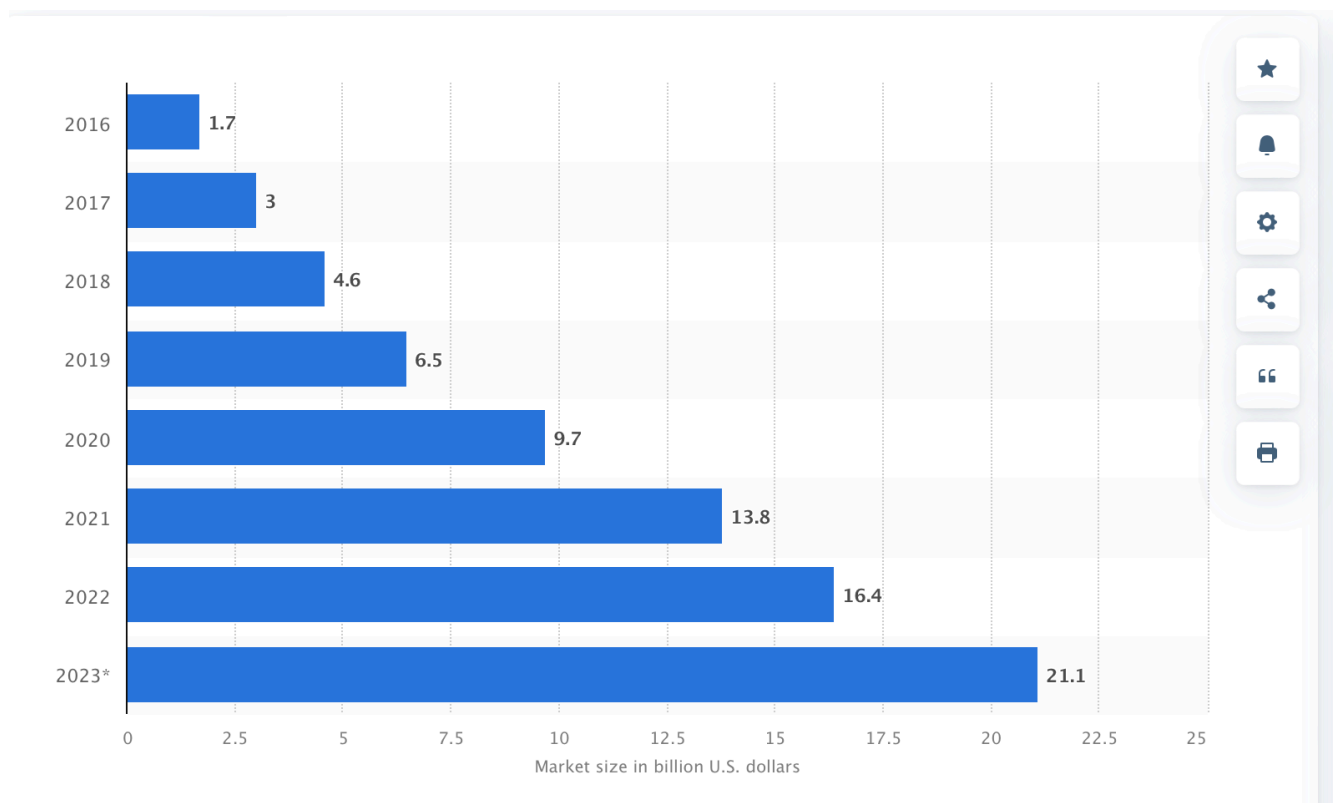


FIGURE 4. Influencer marketing market size worldwide from 2016 to 2023, (Statista 2023)

In addition, Evans et al., 2017, Müller et al, [2018] suggest that the strong nature of consumer engagement makes influencer marketing arguably more popular than traditional, celebrity based and mass media marketing (Belanche et al., 2021, Chapter 2). Furthermore, influencer marketing is easier to use, has a high return on investment, is cost-effective, and provides better market penetration than other forms of marketing. It is also easier for a small business and brand to work with macro or micro influencers than with celebrities. As Sokolova & Kefi [2019] explain consumers now feel a sense of closeness to brands when they use influencers who command a large following on social media (Belanche et al., 2021, Chapter 1).

### **5.3 Social Media Influencers**

Freberg et al., (2011, 1) describe social media influencers (SMIs) as self-governing third-party endorsers, who “conveys a message, shares knowledge and inspire ideas” on sites like Instagram and other social media platforms. Generally, an influencer in social media is an individual whose knowledge and expertise on a particular topic has earned them a reputation. According to Wong (2014), in social media marketing, brands utilize social media influencers to “influence followers’ behaviour and attitudes” through the form of “content creation, podcasts, images and videos”. There are different types of influencers who command large or small following generally known as Macro and Micro Influencers in social media marketing.

Subsequently, Berger and Kellers (2016) research found that consumers are more likely to follow recommendations from influencers because they have more “credibility and knowledge”. There are multiple numbers of influencers who create content in all sorts of things. The authenticity of the influencers also plays a vital role in influencer marketing. Nandagiri and Philip’s (2018) found that social media influencers’ endorsements significantly influenced followers’ purchase decisions. This is because in addition to promoting brands, social media influencers become more relatable to consumers because they are candid and open about their personal life (Berger and Keller 2016). The promotion content includes their daily video vlogs which is a form of social media influencing.

The Freberg’s et al., (2011) study also found that brands can benefit from social media influencers who are turning out to be extremely important. Therefore, a technology is being used which could identify, track, and measure the relevance of social media influencer to the brand. Brands, either big or small,

and established or start-up, are constantly in search of the right influencers for their product and services. For example, these technologies powered by different algorithms, track the pivotal activities of social media influencers' such as number, effectiveness, and the times the post is reshared on various platforms.

#### **5.4 Influencer Credibility**

In influencer marketing, credibility of the influencers and their source are always important if they are supposed to be successful. In order to persuade consumers to buy what is endorsed, the source's qualification is equivalent to endorsers' expertise. Therefore, Till and Busler (2000) explain that source credibility is based on "trustworthiness, attractiveness, and expertise" of an influencer or endorser. In the source credibility theory, the target audience views the source to gain expertise and knowledge about a product or service. As McCracken, [1989] explains, source expertise refers to the perception of their knowledge of the subject, their trustworthiness refers to their perceived credibility and honesty, and their attractiveness is linked to their perceived likeability (Wang & Scheinbaum 2017). The credibility of the source has been suggested as a dominant precursor of attitude toward advertising and ultimately, of advertising effectiveness. Additionally, Till and Busler (2000), also argued that "influencers' persuasive power" and "quality of argument" are critical to enhancing credibility.

Moreover, a recent study by Godey et al. (2019) looked into how social media influencers engage with their customers and build credibility. The study found that consumers' perceptions of influencers' knowledge, attractiveness, and trustworthiness have a significant impact on their credibility. A consumer's belief that an influencer's information and knowledge is credible often affects their consumer buying behaviour and potential purchases (Shimp 2000).

In addition, Wong (2014) in his study explains that influencer credibility is often related to the consumers' perception towards the influencer and the brand itself, since influencers' promotional posting is perceived as genuine by consumers, making them more popular and credible as well as widely used. The credibility is more enhanced when the post from the influencer is not considered as advertisement because there is no sponsorship disclosure.

Therefore, Godey et al., (2019) explain that a promotional post by an influencer who has a high level of credibility will increase the probability of message acceptance and reduce persuasion resistance,

even when disclosure of sponsorship induces critical evaluation of the post. They believe the negative impact of sponsorship is low on influencers with high credibility whereas it is critically evaluated in the promotional post with influencer with low credibility.

## 5.5 Current Trends

As the influencer marketing, especially in the fashion industry, is already big, it is going to be even bigger. But this does not mean it will not face any challenges. In the rapidly changing environment of the influencer marketing in the fashion industry, both influencers and brands face challenges to rapidly change the landscape in terms of fashion trends and technology. For influencers to be more attractive to brands, they must leverage the hottest influencer marketing trends to develop their authority and expertise quickly.

According to the Influencers Marketing Benchmark Report, (2023), the market size of the influencer marketing has increased during the corona pandemic and continues to flourish since. The report predicts the influencer marketing industry to grow to approximately U.S 22 billion dollar in 2023 (Figure 5) and 70 billion dollar by 2029. Therefore, it encourages influencers to grab the opportunity and be part of the ever-growing market size. Furthermore, in the survey conducted by the benchmark report, 83% of the respondents believed influencer marketing to be an effective form of marketing (Influencer Marketing Report, 2023).

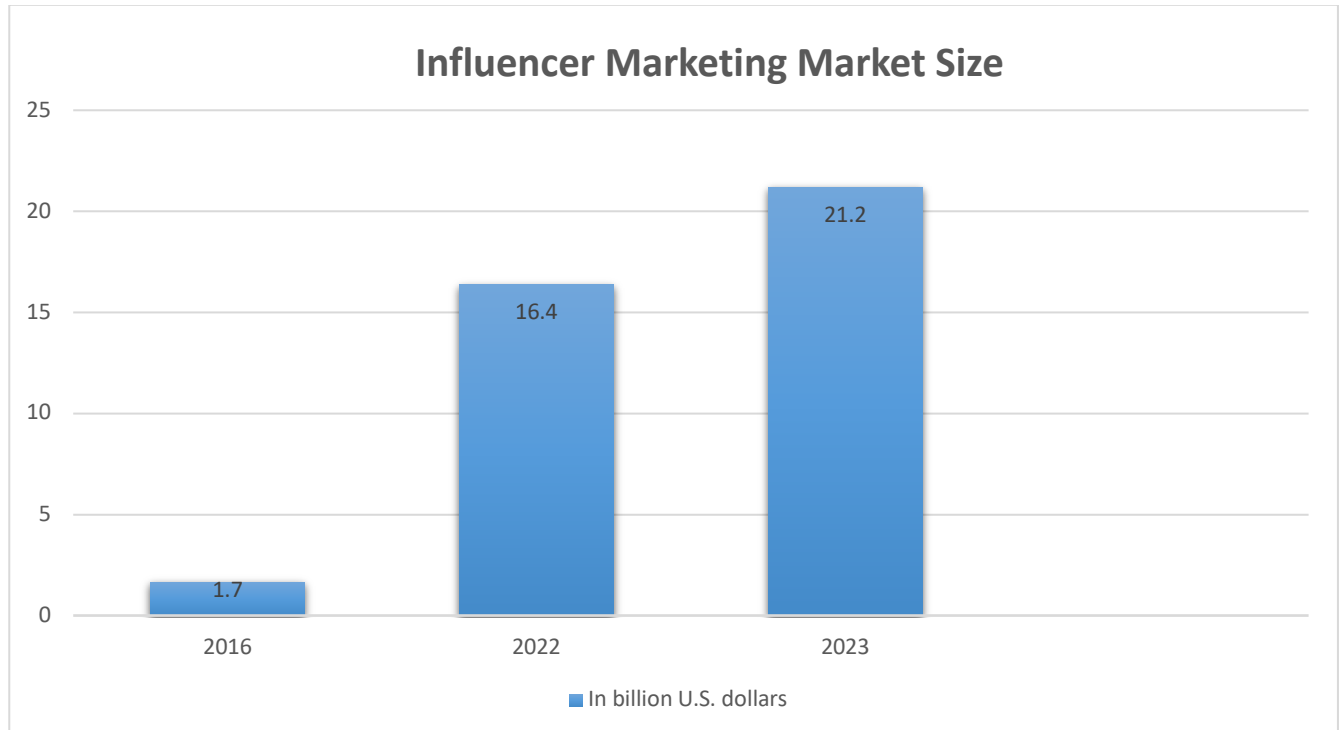


FIGURE 5. Influencer Marketing Size, Source: Influencer Marketing Benchmark Report

In addition, the report highlighted the commitment of brands continuing to spend more on influencer marketing. More than 80% of respondents intend to dedicate a budget for influencer marketing while 67% of respondents intend to increase their spending in 2023. Compared to 2022, the result indicates significant increases in influencer marketing spending in 2023. The increase in marketing could be attributed to firms increasing marketing to combat the current global economic crisis.

Trends are constantly evolving and the introduction of Artificial Intelligence (AI) will have significant impact into the approach of influencer marketing business. As it is already playing a crucial role in online marketing, AI now also plays an important role in influencer marketing. Generally, using artificial intelligence, brands can discover and select the right influencer, verify their authenticity, automate campaigns across various social media platforms and measure the performance of these campaigns and influencers.

According to a report from Influencer Marketing Hub, many brands are already taking advantage of AI generated contents (Influencer Marketing Hub, 2023). For example, clothing line giant H&M used AI to create personalized outfits for its customers which relied on answers from the customers. The campaign was successful resulting in increased sales. Similarly, L'Oreal, a beauty brand used AI to create personalized makeup recommendation for the customers. AI used face recognition technology to recommend makeup product for the customers. In addition, virtual influencers are also hired by brands whose interaction rate are higher than the physical influencers.

Furthermore, trends such as live shopping has become increasingly popular in recent years. Using interactive content and live video, influencers continue to promote products to their communities on their favourite social media platforms. As the majority of the social media platforms like YouTube, TikTok and Instagram have a livestream function, influencers are running a campaign live offering customers to buy a product live (Influencer Marketing Hub 2022). Influencers are successfully using live shopping in cooperation with different brands. Many big brands are partnering with influencers from various social media platforms to host live shopping experiences and it is likely to be increasing in the coming future.

As, customers are increasingly spending the majority of their time in social media and following influential content creators, marketers are willing to spend more money on influencer marketing landscape (Influencer Marketing Benchmark Report 2023). According to the report, new features in social media apps are appearing, features like short videos are dominating the influencer marketing. The impact of these short videos or reels which are merely seconds long are very popular marketing products. TikTok has turned out to be a great platform for this feature as it is becoming a great choice for the influencers.

## 6 RESEARCH METHODOLOGY

The empirical research for the thesis is conducted using the quantitative research method which is used to gather numerical data related to study topic through survey. According to Williams et al., (2022), quantitative research consists of investigations in which numbers are used to express the results of data collection and coding. These derived data will be used to quantify behaviors, opinions and other defined variables. This research method can be used to test causal relationship between the topic and customer behaviors, identify different patterns and trends and make predictions. It is possible to ensure that data collection and analysis are consistent and standardized by consistently using one research method throughout the study.

To conduct this study, a survey is conducted using questionnaires to customers online. The survey questions are formulated according to the findings of the theoretical framework. The data collected through survey is processed and through descriptive analysis, a summary of data will be used to visualize using graphs, charts and frequency tables. This will help to identify different consumer behaviors and past and present trends.

### 6.1 Validity and Reliability

In order to yield beneficial and accurate results, the validity and reliability of the scales used in research are essential. Therefore, researchers need to understand how scales are measured for reliability and validity. In research studies, validity refers to the extent to which they measure what they claim to measure without bias or external influences. Mohajan (2017) suggests that validity refers to the accuracy a method measures what it is intended to measure, research with high validity produce results that are based on real properties, characteristics, and variations found in the physical and social world.

In research, validity has two essential parts: Internal and External. The internal validity of the study is determined by how the group is selected, how data is recorded and how the results were analysed referring to whether the study can be replicated. Meanwhile, the external validity of a study indicates whether the results are transferrable to other groups (Willis 2007).

The reliability of a method refers to the consistency with which it measures something. A reliable measurement is one that consistently achieves the same result under the same circumstances. For example, a thermometer displays the same result when the temperature of a liquid sample is measured several times under identical conditions. While multiple doctors using the same symptom questionnaire on the same patient with the same health condition produce different diagnoses, which indicates the low reliability. As a result, describing measurement errors and theoretical relationships will be difficult if reliability and validity are lacking (Mohajan 2017).

As validity and reliability are two critical concepts in quantitative analysis, the above mentioned studies were taken into account while drafting the research process. The questionnaire is the most important part of this survey as it is given utmost importance in order to gather accurate data that are interpretable and generalisable. The questionnaire in authors opinion is valid, reliable and clear where the respondents clearly understand the objective of the questions. As the majority of respondent are fashion conscious, the data derived from the survey has a high level of validity and reliability.

## **6.2 Questionnaire**

A questionnaire is used as a tool which can be used to gather a large amount of information from a relatively small sample size in a fast, efficient and cost-effective manner. There are many advantages to using these tools for measuring subjects' behaviour, preferences, intentions, attitudes, and opinions. With open-ended questions, respondents are able to express their opinion however they see fit in their own words. While answers to closed ended questions are "predetermined" and can be selected from a list of possible responses (Mohajan 2017).

In this research, a close-ended questionnaire is designed where multiple options are available to respondents to choose from. The questionnaires are designed to manage the target audience in accordance with the research problem. The survey was divided into two parts where it covered both the research question where respondent could understand and respond to the survey without any problems. The survey using this questionnaire was conducted online especially targeting the fashion consumers and one particular age group. The survey was anonymous and the participants included university students as well as members of the fashion community in the social media who are actively engaged in fashion trends and discussion.

## 7 RESEARCH RESULTS

The survey was conducted online using Webropol where questionnaires were made available by creating a link where respondents can participate anonymously. As there are two research parts, the questionnaires are divided into two parts with a total of 28 questions. However, as both the research topics are interrelated, it is combined into one questionnaire where the transition to the second part of the survey is smooth and continue the essence of the research problem. The survey was conducted in various active social media fashion forums, where people of different demographics discuss the latest fashion news and trends. In addition, the survey was also conducted among the Centria University of Applied Sciences students which according to their particular age group are suitable respondents to the research topics. A total of 40 respondents took part in the survey.

### 7.1 Data Analysis: Consumer Sentiment in Sustainable Fashion

This first section of the survey included the questions regarding the knowledge and consumption of sustainable fashion. This section included a total of 16 questions where it focused on sustainable fashion consumption and their awareness towards the overall sustainability issue in the fashion industry.

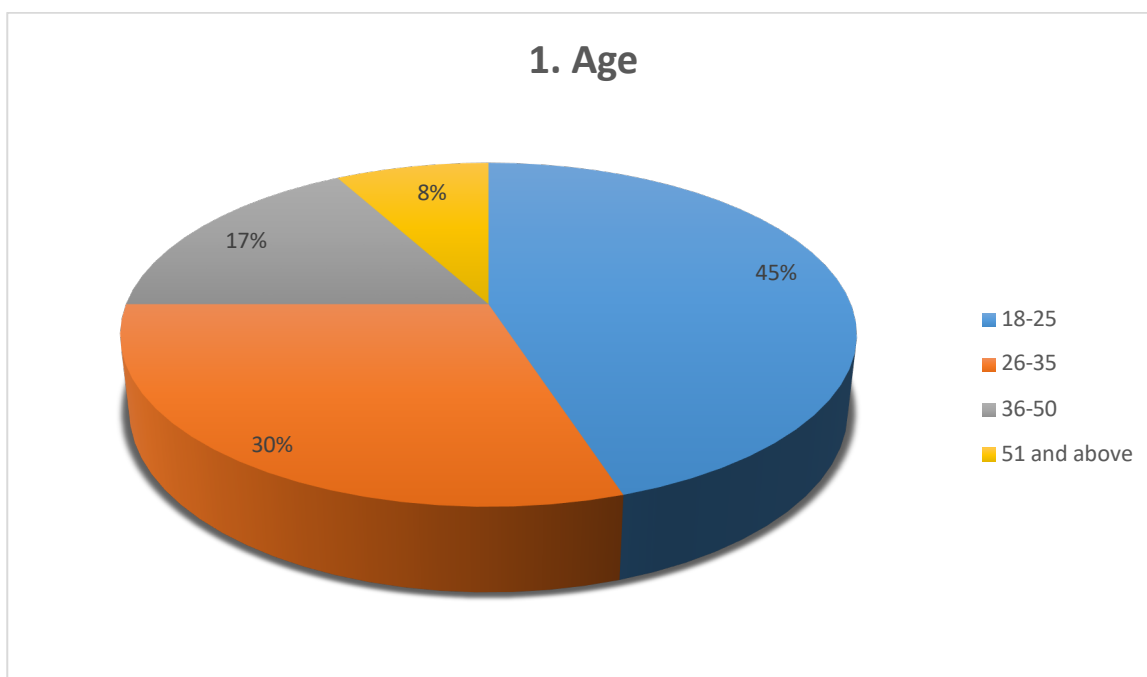


FIGURE 6. Survey Responses to question 1

The above pie-chart (Figure 6) illustrates the age group of the 40 respondents, where 45% were of the age group 18-25, 30% were of the age group 26-35, 17% of the age group between 36-50 and 8% were of the age group 51 and above. The data indicate that the majority of the respondents are of a young age group of 18-25 actively involved in fashion.

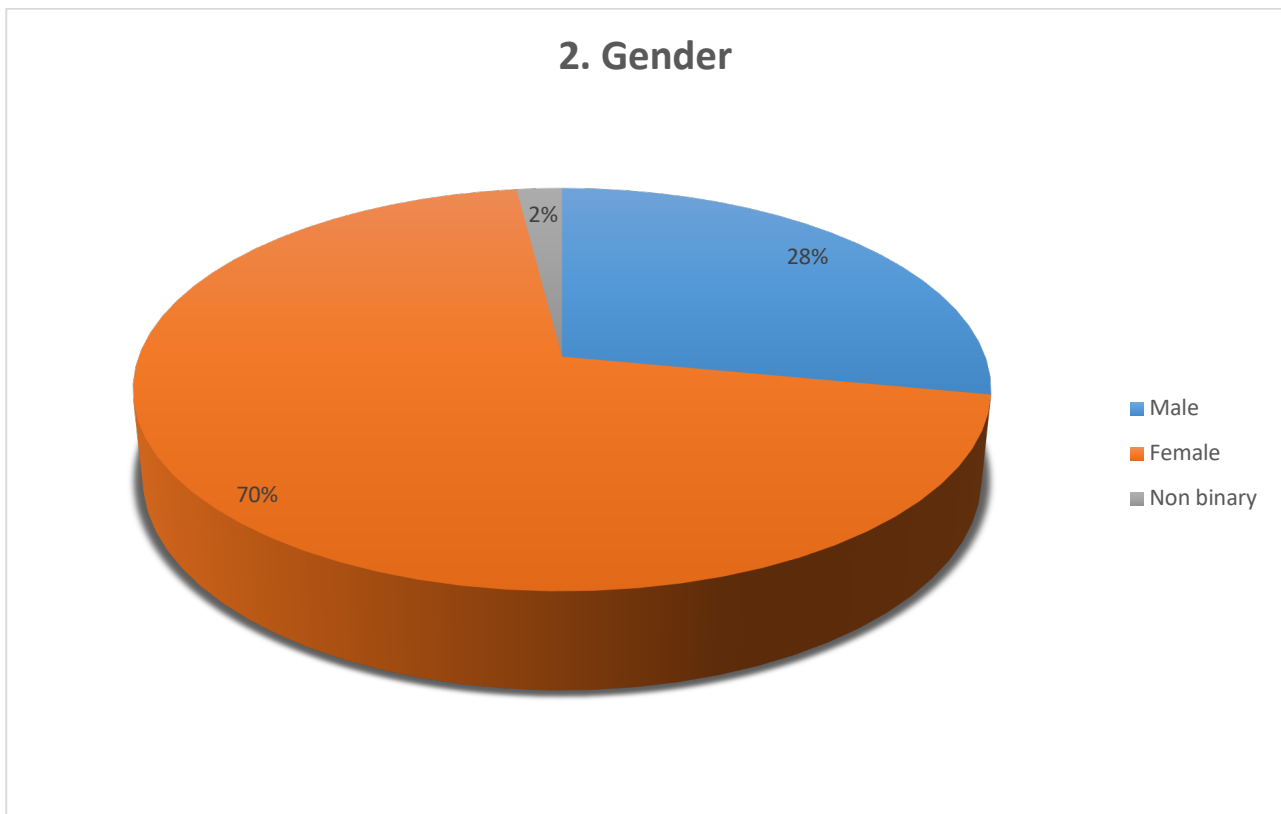


FIGURE 7. Survey Responses to question 2

The pie-chart in figure 7 above illustrates gender where 28% of the respondents identified themselves as males, 70% identified themselves as females and the remaining 2% as non-binary. The result also indicates that the majority of the respondents were female which constitutes more than three quarters of the respondents thus showing active fashion customers are female who made significant part of this survey.

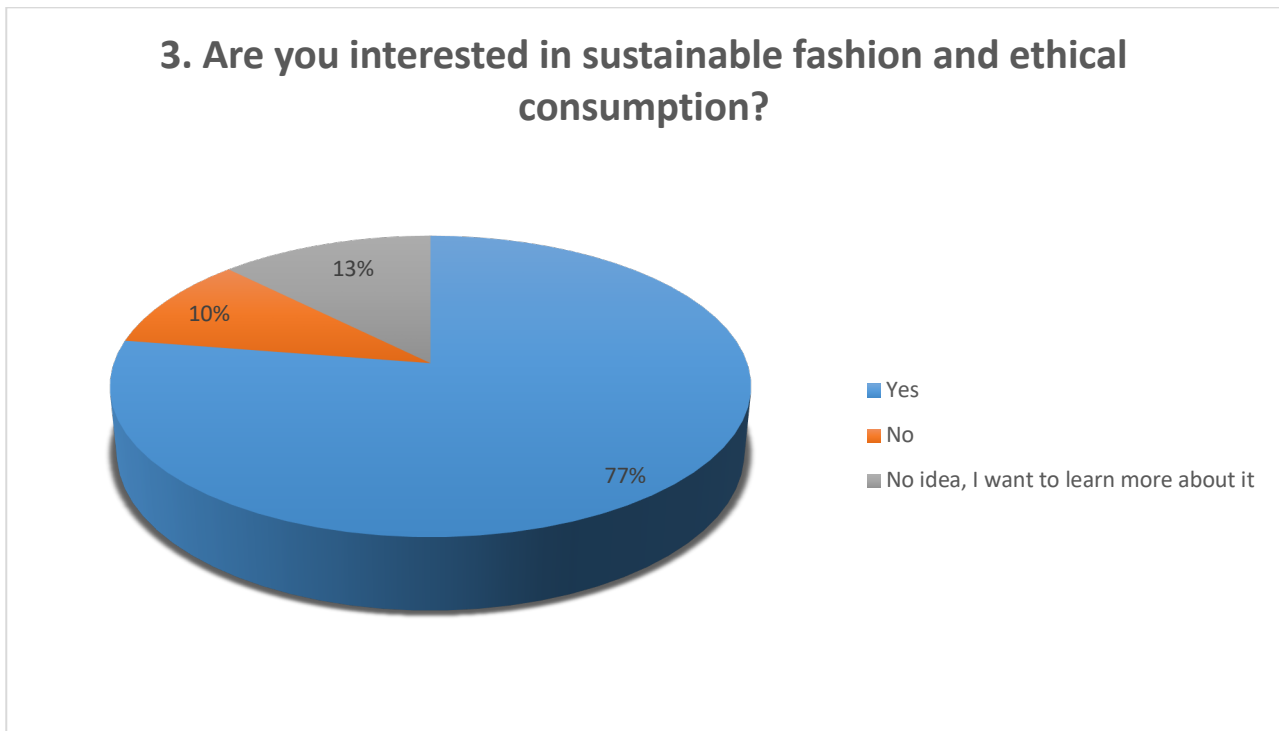


FIGURE 8. Survey Responses to question 3

The above pie-chart in figure 8 represents the interest in sustainable and ethical fashion consumption. Out of all respondents, 77% of the respondents responded that they are interested in sustainable as well as ethical fashion consumption. 13% of respondents said they have no idea about the topic but they are willing to learn more about the topic, while 10% responded that ethical and sustainable fashion consumption do not interest them. The result clearly illustrates that the majority of the respondents are interested in sustainability and ethical issues in the fashion industry.

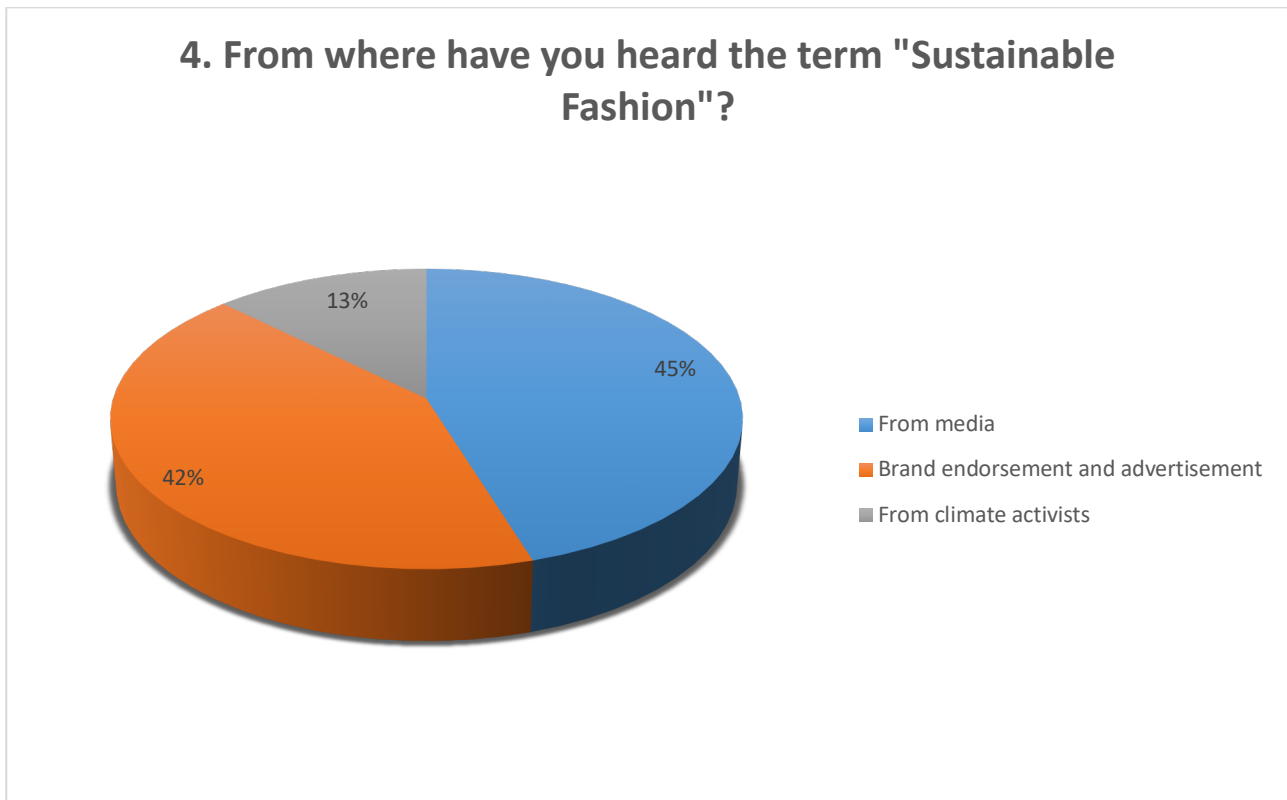


FIGURE 9. Survey Responses to question 4

Above in figure 9 the pie-chart demonstrates the response result from where respondents get information 'Sustainable Fashion'. 45% of respondents said that they heard about sustainable fashion from media, 42% said they heard about it from brand endorsement and their advertisement and 13% respondent said they heard about it from climate activist. From the result, it can be assumed that the majority of the fashion consumers get information media and brands efforts to promote sustainable fashion industry. The results also illustrate the effort of fashion brands and media alongside climate activists to raise awareness about the sustainability issue in the fashion industry.

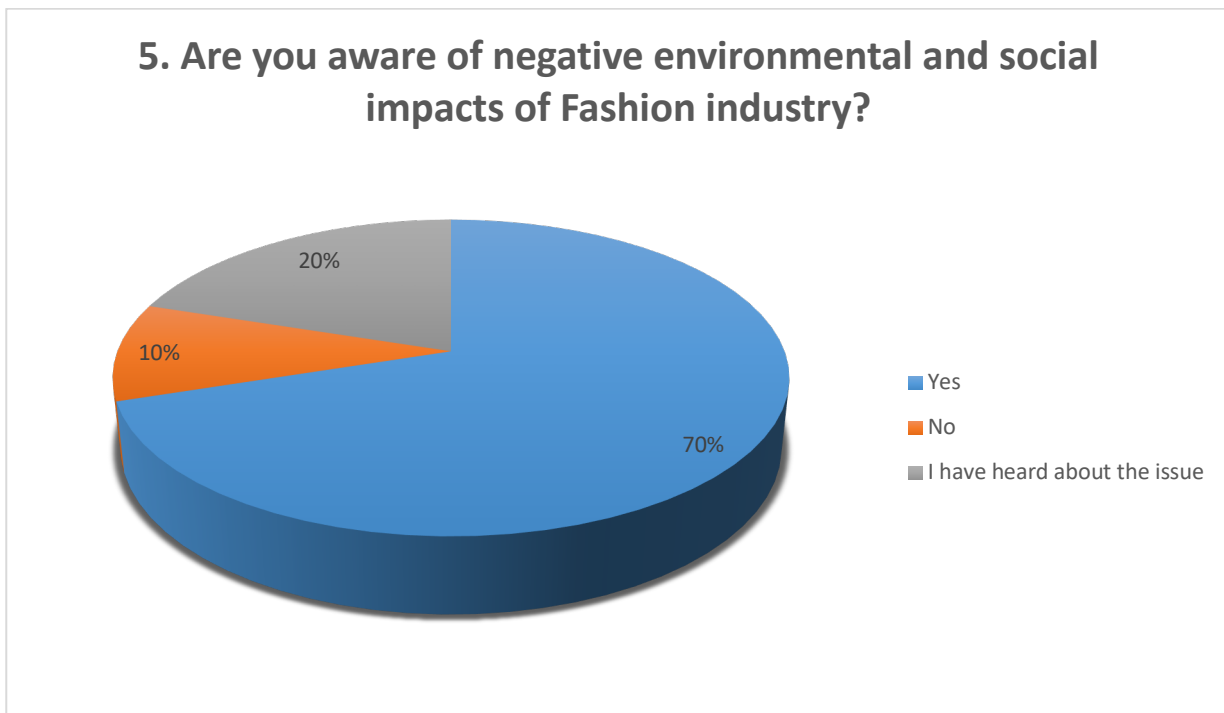


FIGURE 10. Survey Responses to question 5

Above in figure 10 the pie-chart illustrates the response on the question about consumer awareness on negative environmental and social impacts of fashion industry. 70% of the respondents said they are aware of the negative impact, 20% acknowledged that they have heard about the issue, while 10% of the respondents said they have not heard anything about it. The results assert that the majority of respondents are aware of the issue regarding the negative social and environmental impact of the fashion industry and take good account of their fashion consumption impact.

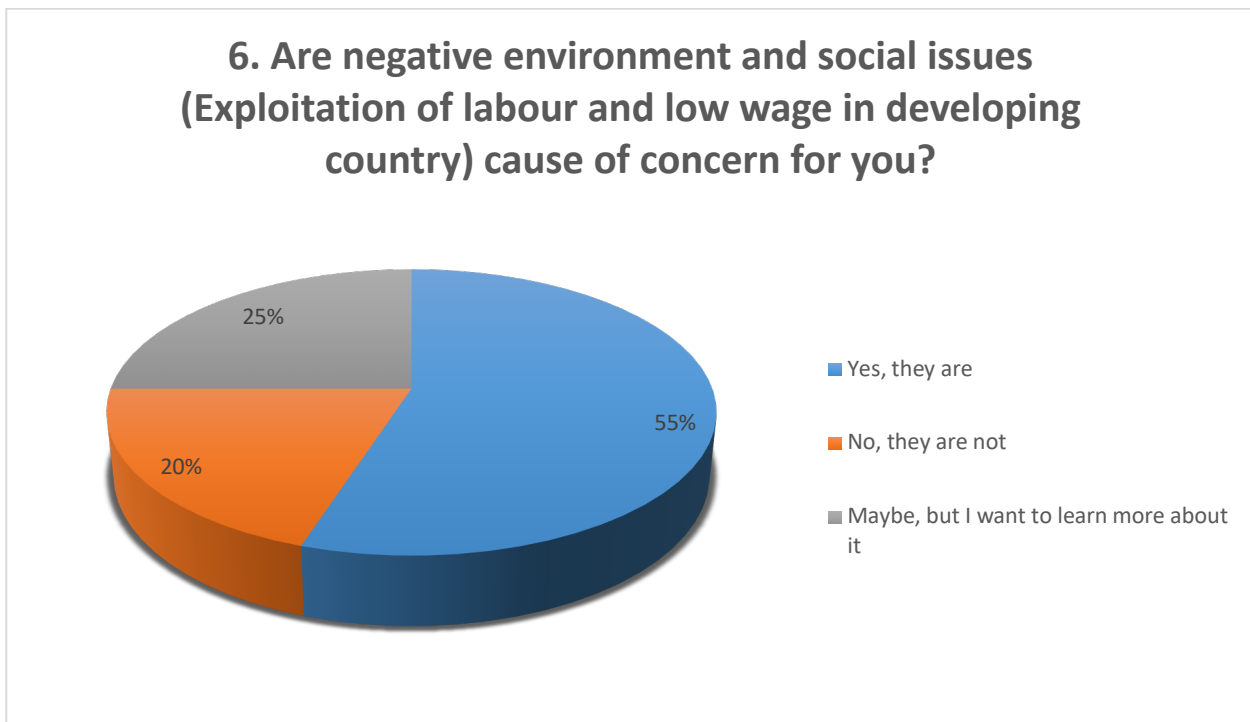


FIGURE 11. Survey Responses to question 6

Above in figure 11 the pie-chart demonstrate the result on the question if negative environment and social issues is a cause of concern for them. 55% of the respondents said they are concerned about the issue, 25% responded that they are not sure if they are concerned, but they want to gather more information. Meanwhile 20% of respondents said negative environment and social issues including labour exploitation and low wages in developing country is not a concern for them. In these issues also, the majority of respondents are concerned about all the negative impact fashion industry is having on both social and environmental issues. Issues such as labour exploitation and low wages in the developing countries is a cause of concern for consumers where the majority of fashion products are manufactured and exported to developed countries by top fashion brands.

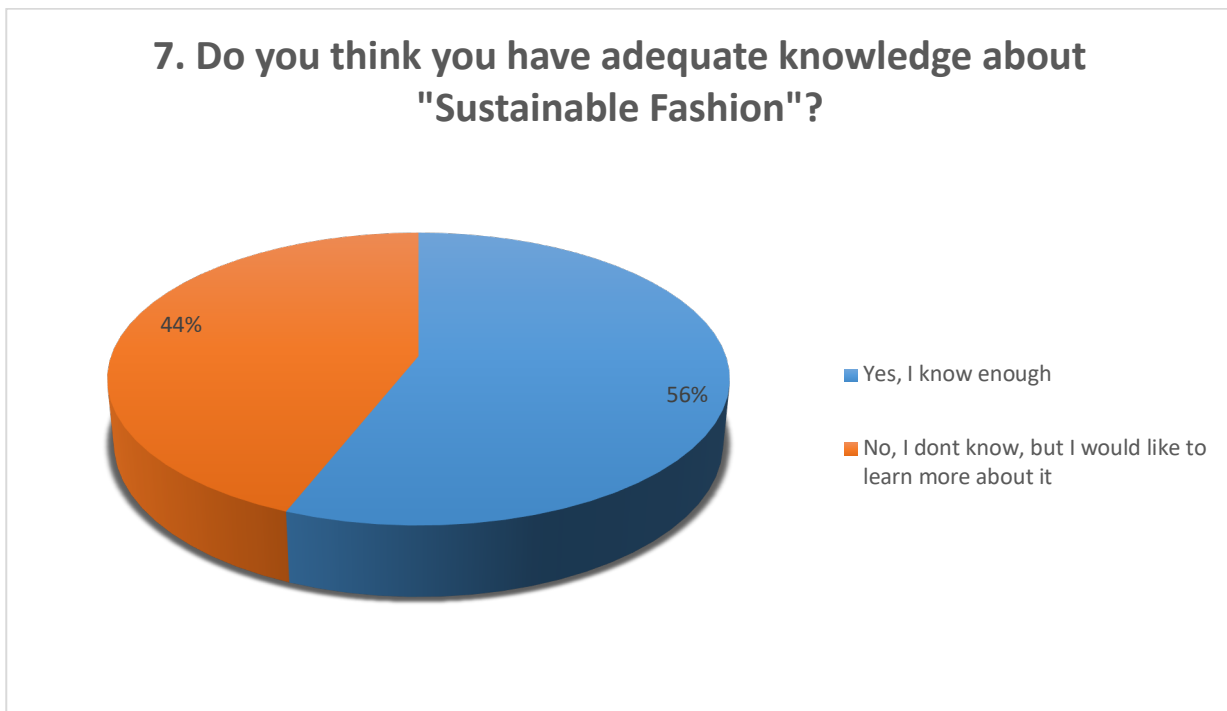


FIGURE 12. Survey Responses to question 7

The diagram in figure 12 above illustrates that 56% of the total respondents think that they have adequate knowledge about the sustainable fashion, while 44% believe they are not sure but are willing to learn more about the topic itself. As previous results from figure 5 showed the majority have heard about the topic, the majority of respondents here also believe they have enough knowledge about the topic. Even though 44% of the respondents admitted not knowing enough, they stated that they are interested in learning more about sustainable fashion.

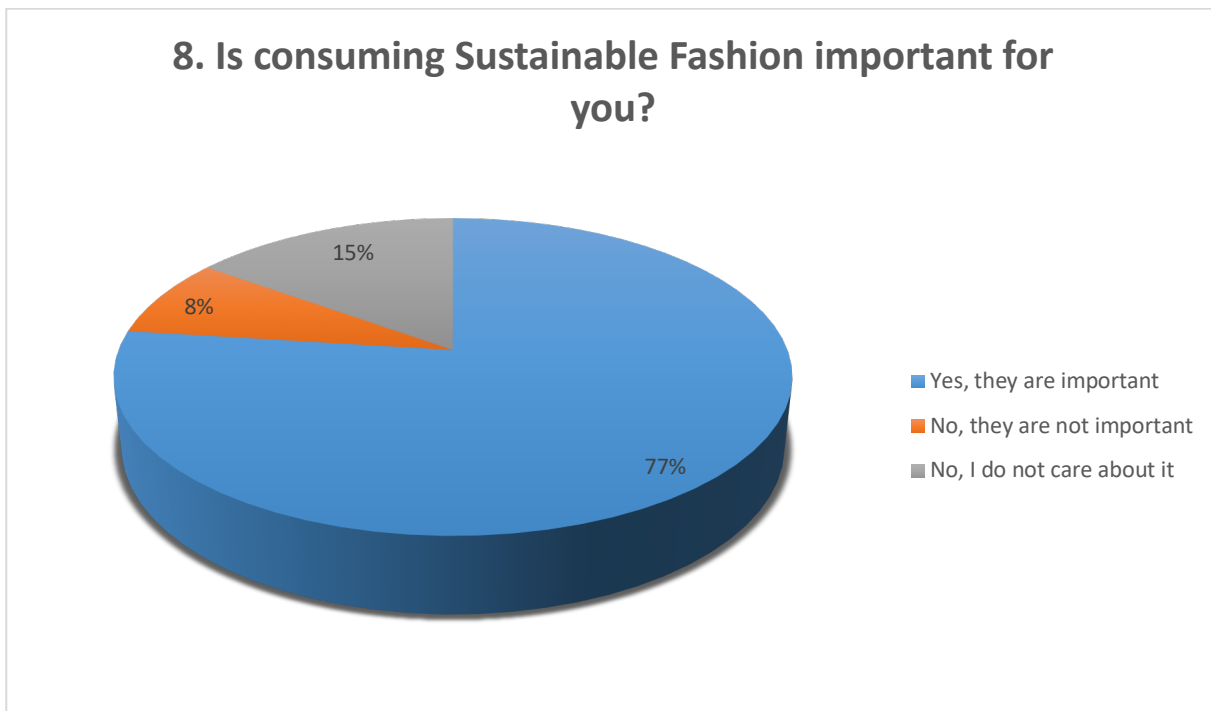


FIGURE 13. Survey Responses to question 8

Above in figure 13 the pie-chart illustrates that 77% of the total respondents said that consuming sustainable fashion is an important issue for them. 15% of the total respondents responded that they do not care about consuming sustainable fashion, while only 8% said that they are not important at all to them. Therefore, from this result, it is clear that sustainable fashion consumption is important for the majority of the respondents. The result also indicates that sustainability affects the fashion consumption of the majority of the respondents.

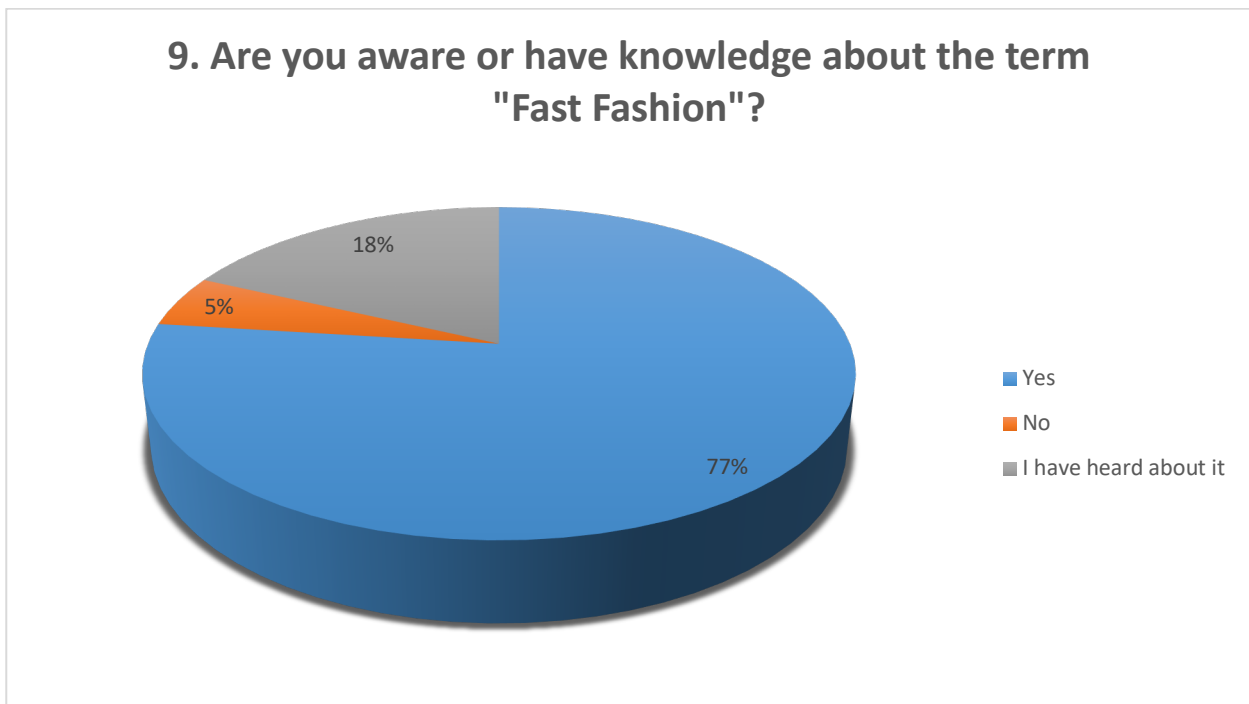


FIGURE 14. Survey Responses to question 9

Above in figure 14 the pie-chart illustrates the result regarding the question on respondents having knowledge about the term Fast Fashion. 77% of the respondents said they have knowledge about the topic, while 18% admitted not having heard about it and only 5% said they have no knowledge about the term 'Fast Fashion'. As Fast Fashion is one of the hottest fashion trends among a wide range of customers and is also a contributor to unsustainability in fashion industry, the result clearly demonstrates that the majority of the respondents have knowledge about fast fashion. Having sufficient knowledge on the topic helps reduce consumption of fast fashion thus contributing towards the sustainability in fashion industry.

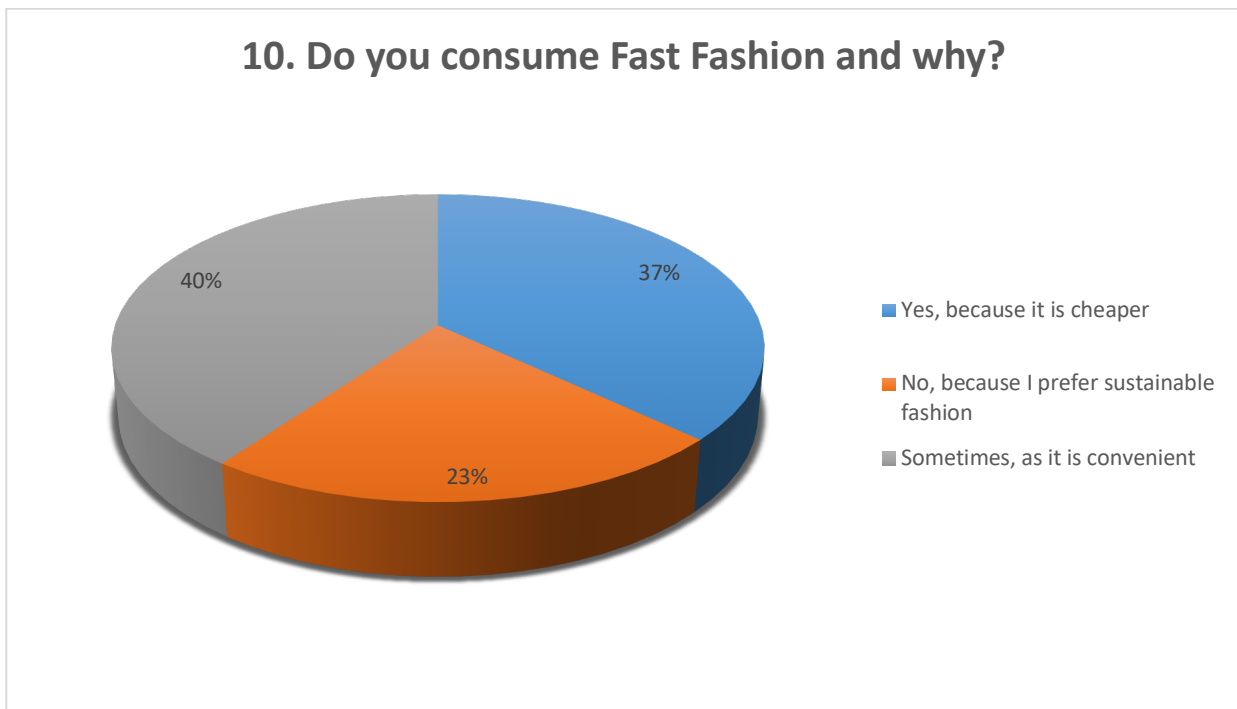


FIGURE 15. Survey Responses to question 10

The pie-chart above in figure 15 illustrates the results regarding if the respondents consume fast fashion and the reason for it. Of the total responses, 37% of the respondents said that they consume Fast Fashion because of its affordability. While 40% of the respondents said that they only consume fast fashion product sometimes and the reason is that it is convenient for them to do so. Meanwhile, 23% respondents said that they do not consume fast fashion at all because of preference to sustainability. The result indicates that it is hard for consumers to completely avoid fast fashion due to its price and convenience. It should not come as a surprise that Fast Fashion has a strong foothold in the fashion industry and is extremely popular among young consumers on the above mentioned grounds.

**11. Are you willing to pay more in order to consume Sustainable Fashion (better environmentally and socially)?**

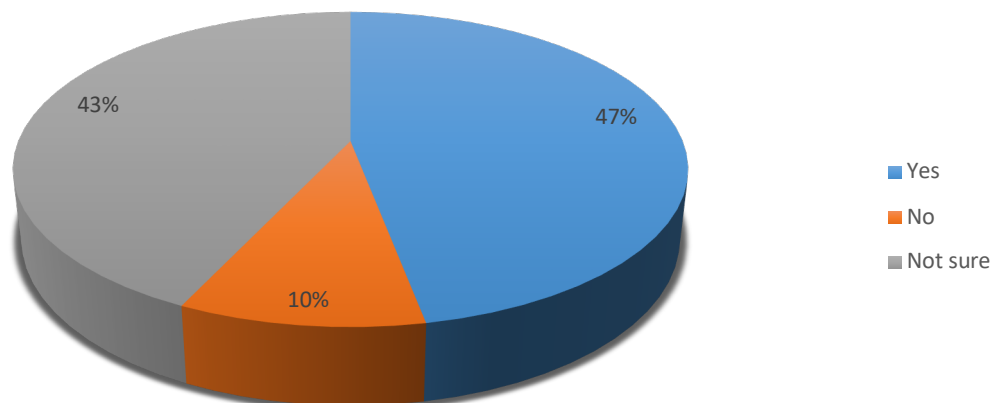


FIGURE 16. Survey Responses to question 11

Above in figure 16 the pie-chart demonstrates that 47% of the respondents said they are willing to pay more in order to consume sustainable fashion which is environmentally and socially just. At the same time, 43% of the surveyed respondents said they are not sure, while 10% said they will not pay more for sustainable fashion. The result shows that almost half of the respondents are willing to pay more in order to consume sustainably while another large proportion are not sure if they would do that. Only a small fraction of respondents said they will not do so.

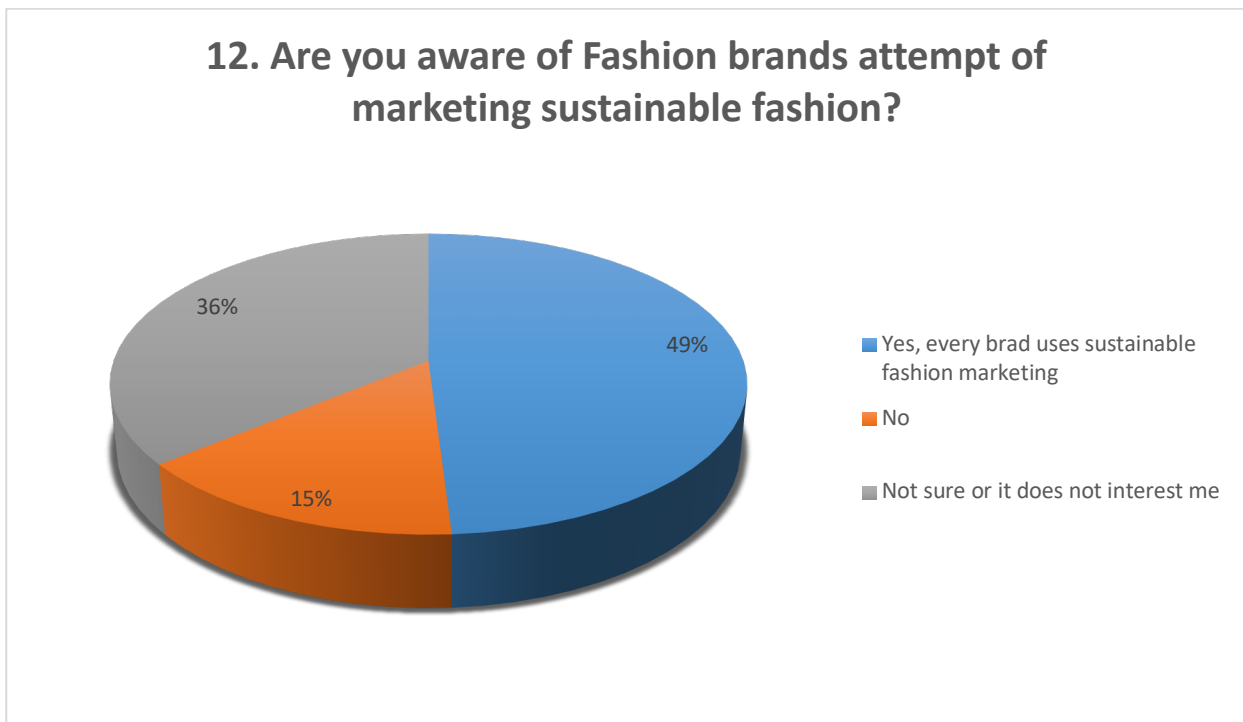


FIGURE 17. Survey Responses to question 12

The pie chart in figure 17 above shows the shares of respondents being aware of fashion brands attempts of marketing sustainable fashion. 49% respondents said they know the sustainable marketing attempts from brands, while 36% said either they are not aware or that does not interest them. Only 15% of respondents said they are not aware of such effort. The result clearly indicates that the largest proportion of the respondent are aware of sustainable marketing efforts which every brand employs today to remain relevant in competitive marketing trends. Only a small fraction said they are not aware of these marketing efforts.

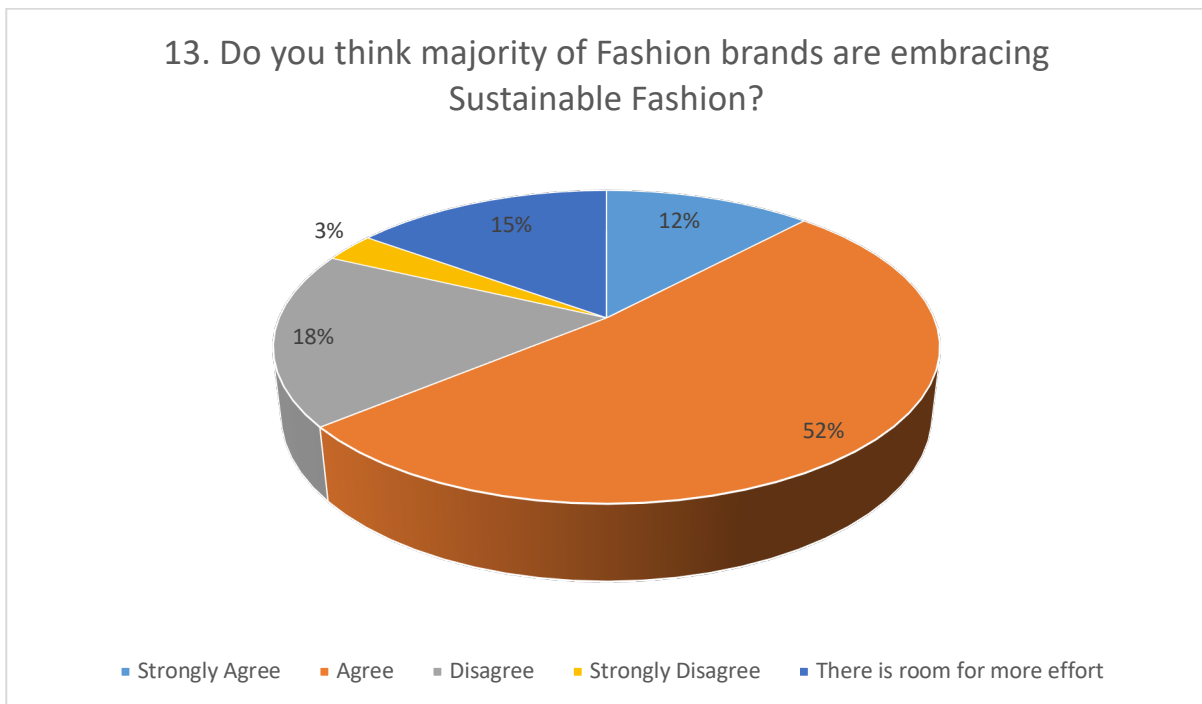
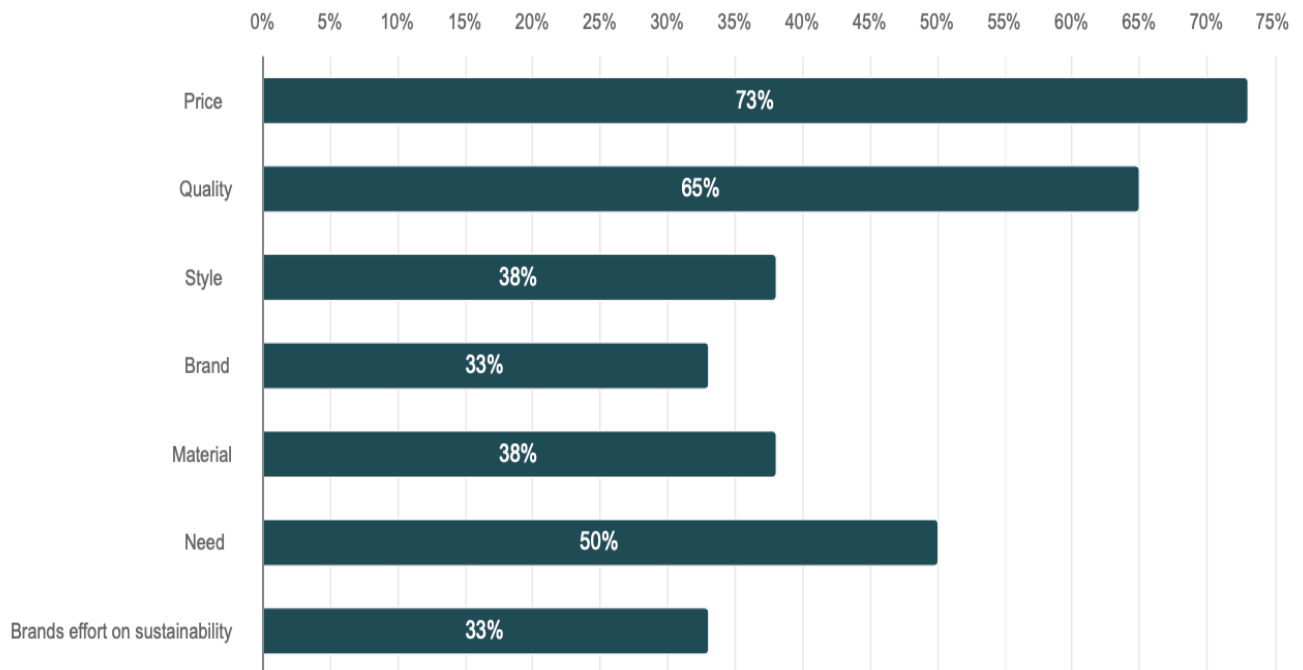


FIGURE 18. Survey Responses to question 13

The pie-chart in figure 18 above shows the response result about if consumers think major fashion brands are embracing sustainable fashion. 12% of the total respondents strongly agreed the sustainability is embraced by major fashion brands, 52% of the respondents agreed with it. While 18% of the respondents disagreed with the statement, 3% of them strongly disagreed. Moreover, 15% of the respondents believe that fashion brands can do more to achieve sustainability in the fashion industry. The result clearly indicate that the majority of the respondents believes that big and major fashion brands are embracing sustainable fashion while doing their business.

#### 14. When it comes to buying clothing, what is most important to you?

Number of respondents: 40 , selected answers: 131



	n	Percent	Percent of Cases
Price	29	22%	72.50%
Quality	26	20%	65%
Style	15	12%	37.50%
Brand	13	10%	32.50%
Material	15	11%	37.50%
Need	20	15%	50%
Brands effort on sustainability	13	10%	32.50%
<b>Total</b>	<b>131</b>	<b>100%</b>	<b>327.50%</b>

FIGURE 19 and TABLE 1. Survey Responses to question 14

The above bar-graph in figure 19 illustrates the result on the survey question regarding the most important reasons for buying clothing. As the results show, 22%, 20% and 20% of respondents stated that price, quality and need are prioritized respectively when they are purchasing their clothing. 15% each of the respondents chose Style and Brand compared to only 13% choosing sustainability. It is an interesting result as discussed earlier in the theoretical framework, despite having concerns about sustainability in fashion and willingness to consume sustainable fashion, economic factors such as price and

need, as well as need play a crucial role in sustainable buying behaviour in the respondents. As analysed in the theoretical part above, Preisendoerfer (1992) suggested that people behave environmentally friendly when it costs the least, i.e. when it takes the least effort and time to act ethically. The result is a stronger focus on a “price” while ignoring “ethical consideration” due to this kind of “values and attitudes” (Carrigan & Attalla, 2001).

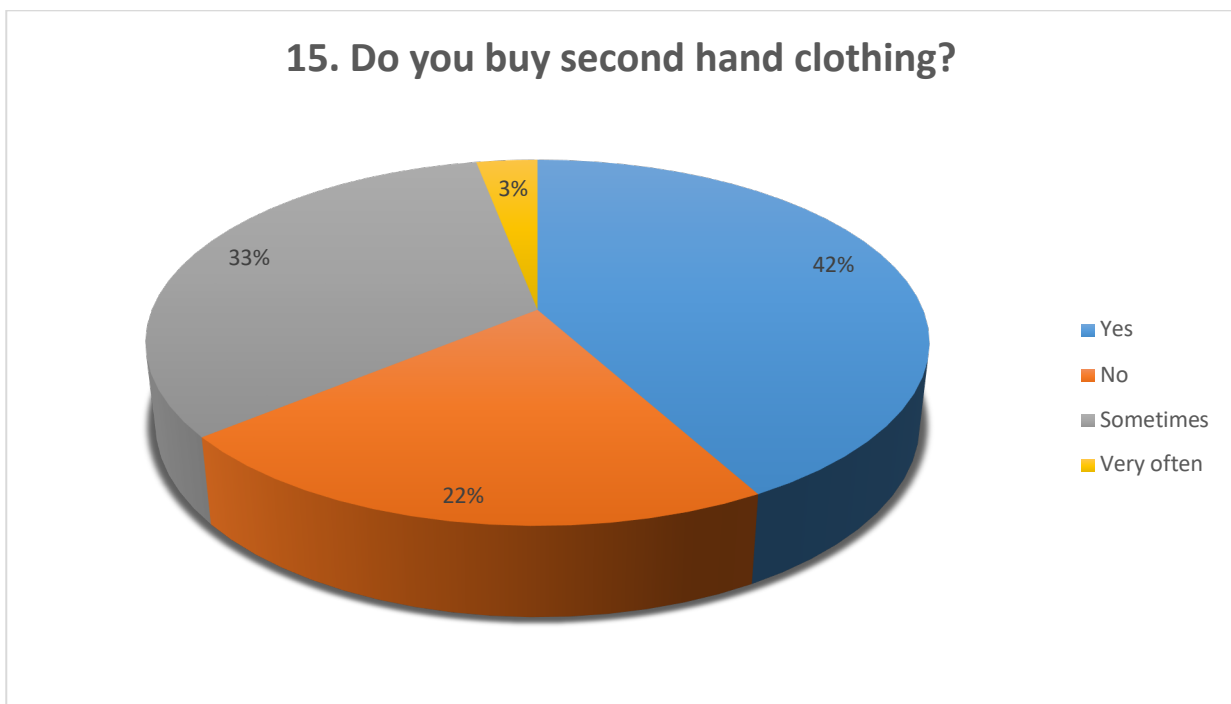
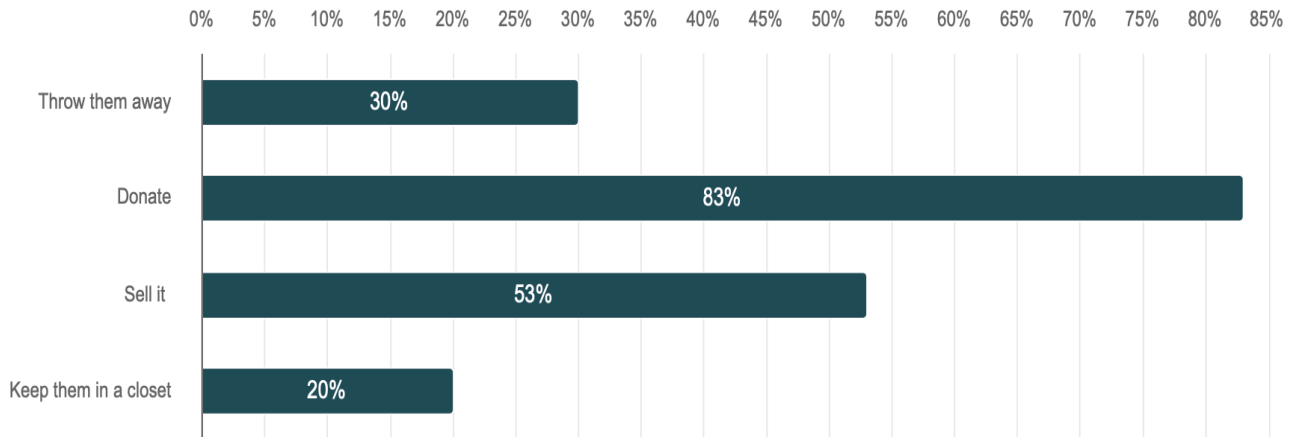


FIGURE 20. Survey Responses to question 15

The pie-chart in figure 20 above illustrates the result on the question regarding buying second hand clothing. 42% of the respondents said they buy second hand clothing, while 22% responded with no. Moreover 33% of the respondents said they do buy second hand clothing sometimes and 3% responded very often. The result indicates the largest proportion of respondents said they follow sustainable buying while less than a quarter said no. A negligible amount of respondent said they buy second hand clothing very often.

**16. If you have unwanted or old clothing, what do you do with it?**

Number of respondents: 40 , selected answers: 74



	<b>n</b>	<b>Percent</b>	<b>Percent of Cases</b>
Throw them away	12	16%	30%
Donate	33	45%	82.50%
Sell it	21	28%	52.50%
Keep them in a closet	8	11%	20%
<b>Total</b>	<b>74</b>	<b>100%</b>	<b>185%</b>

FIGURE 21 and TABLE 2. Survey Responses to question 16

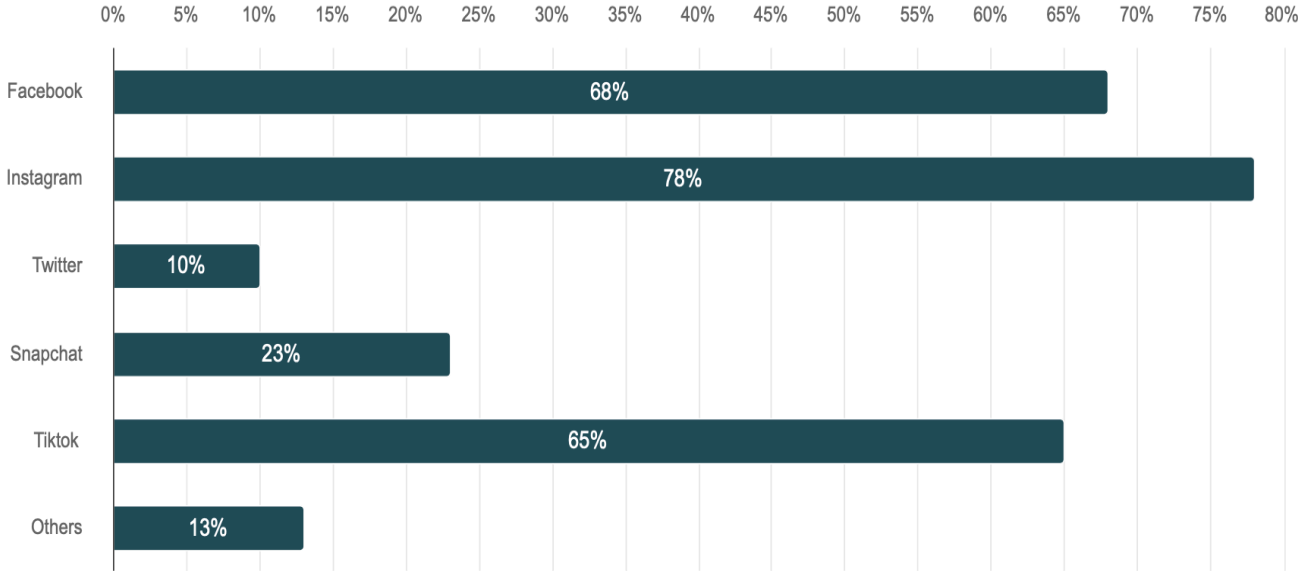
The above in figure 21 bar-graph and table 2 illustrate the result on the question asked about the clothing disposal habit of the respondents. The majority of the respondents (45%) responded that they donate theirs. While, the second most common response was that they sell theirs, which is 28% of the total number of respondents. 16% of the respondents said that they throw away their used clothes, while 11% said they keep them in a closet. From this result, it can be said that more than half of the respondents choose sustainable disposable habits of their unused clothes.

**7.2 Data Analysis: Online Influencer influence on consumers sustainable purchasing habit**

**17. What social media you use in order to follow fashion news and trends?**

*B. Fashion Influencers influence in Fashion Industry*

Number of respondents: 40 , selected answers: 102



	n	Percent	Percent of Cases
Facebook	27	26%	67.50%
Instagram	31	30%	77.00%
Twitter	4	4%	10%
Snapchat	9	9%	22.50%
Tiktok	26	26%	65%
Others	5	5%	12.50%
Total	102	100%	254.50%

FIGURE 22 and TABLE 3. Survey Responses to question 17

The above in figure 22 bar-graph and table 3 illustrate the result regarding choice of social media in order to follow fashion trends and news. 30% out of the total responded they follow Instagram while 26% each said they follow Tiktok and Facebook. This result indicates that the majority of respondents follow their fashion on platforms such as Instagram and Tiktok, which is already popular for the influencers because of their user-friendliness and popularity. In addition, these two social media platforms are popular among the majority of the age -group and females surveyed in this research. Only 9% follow influencers on Snapchat, 4% on Twitter and remaining 5% on other social media.

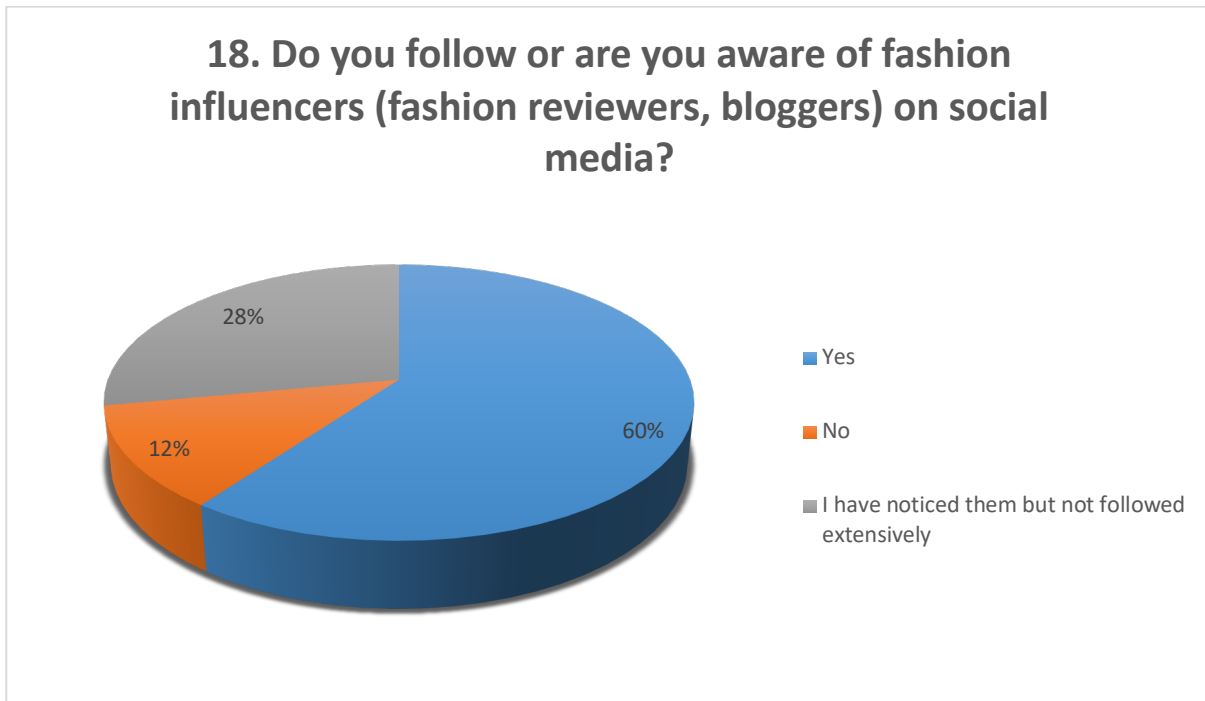
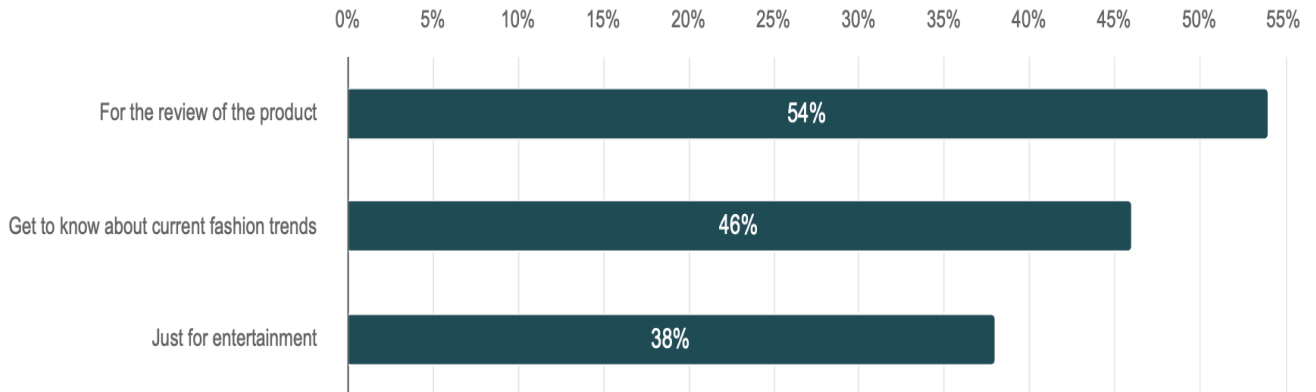


FIGURE 23. Survey Responses to question 18

The above pie-chart in figure 23 illustrates that 60% of the total respondents follow or are aware of the fashion influencers on various social media outlet which indicates that the respondents have prior knowledge of the presence of online influencers. While 28% of the total responded admitted noticing online influencers but not following extensively, only 12% said they neither follow nor are aware of them. Therefore, we can say as the majority of the respondents are already following and are aware of those influencers making them interesting and important for the data analysis in this research.

### 19. Why do you follow fashion influencers on social media?

Number of respondents: 39 , selected answers: 54



	n	Percent	Percent of Cases
For the review of the product	21	39%	53.80%
Get to know about current fashion	18	33%	46.20%
Just for entertainment	15	28%	38.50%
Total	54	100%	138.50%

FIGURE 24 and TABLE 4. Survey Responses to question 19

The above bar-graph in figure 24 illustrates the result regarding the reason for following influencers on social media. 39% out of the total respondents said they follow influencers for the review of the product they want to purchase, 33% for staying up to date with current fashion trends and 28% just for entertainment purposes. From this result, we can say that almost half of those who are interested in fashion follow fashion influencers for information on the product they might be interested in purchasing, which has now become a trend. At the same time, the ability of influencers successfully creating interesting fashion content to keep their followers entertained. As Wong (2014) describes that influencers are perceived “experts” therefore able to garner large following.

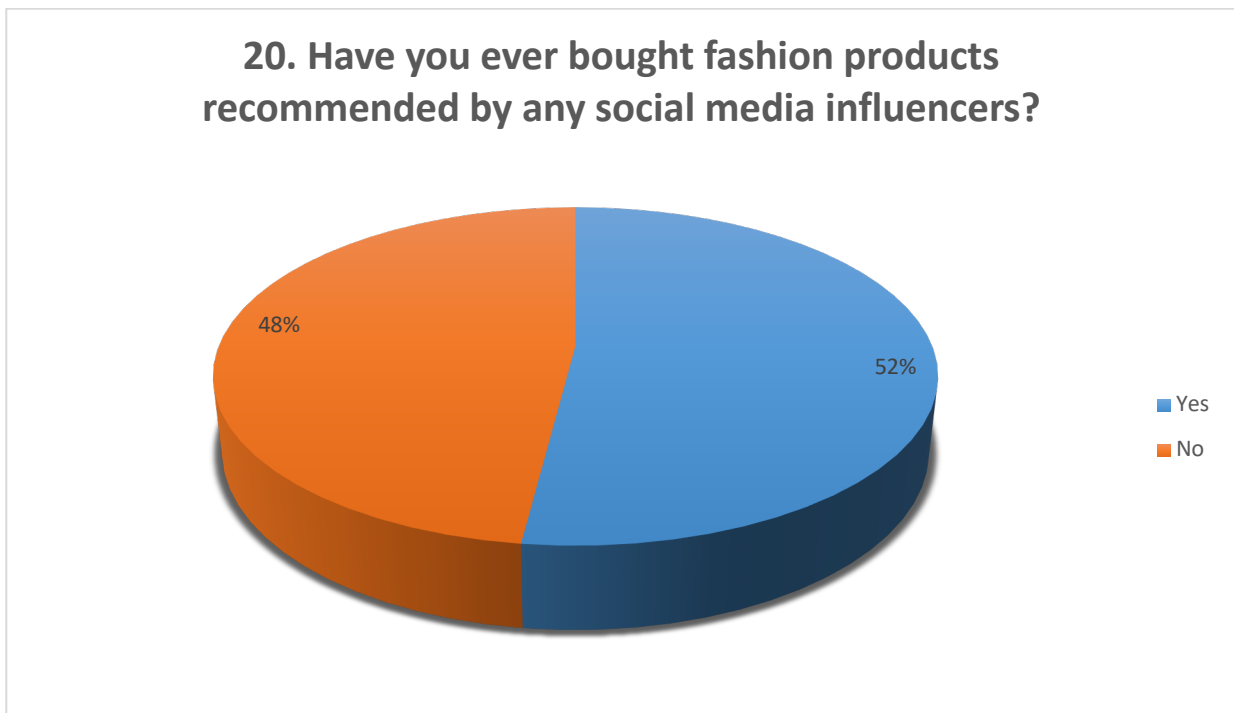


FIGURE 25. Survey Responses to question 20

As we can see in figure 25, out of the total respondents, 52% said that they have bought fashion products on the recommendation of the social media influencers they follow, compared to 48% who have never purchased any. This result also helps us to understand why consumers follow influencers on social media. In the previous survey result, the majority of respondents said they follow them for the thorough review of the product. Therefore, this result shows, more than half of the respondent follow the recommendation on their fashion purchase product. As Wong (2014) explained in the theoretical review above, many consumers perceive an influencer's promotional posting as coming from the influencer's own opinion, therefore making it widely used as well as making it more authentic and credible.

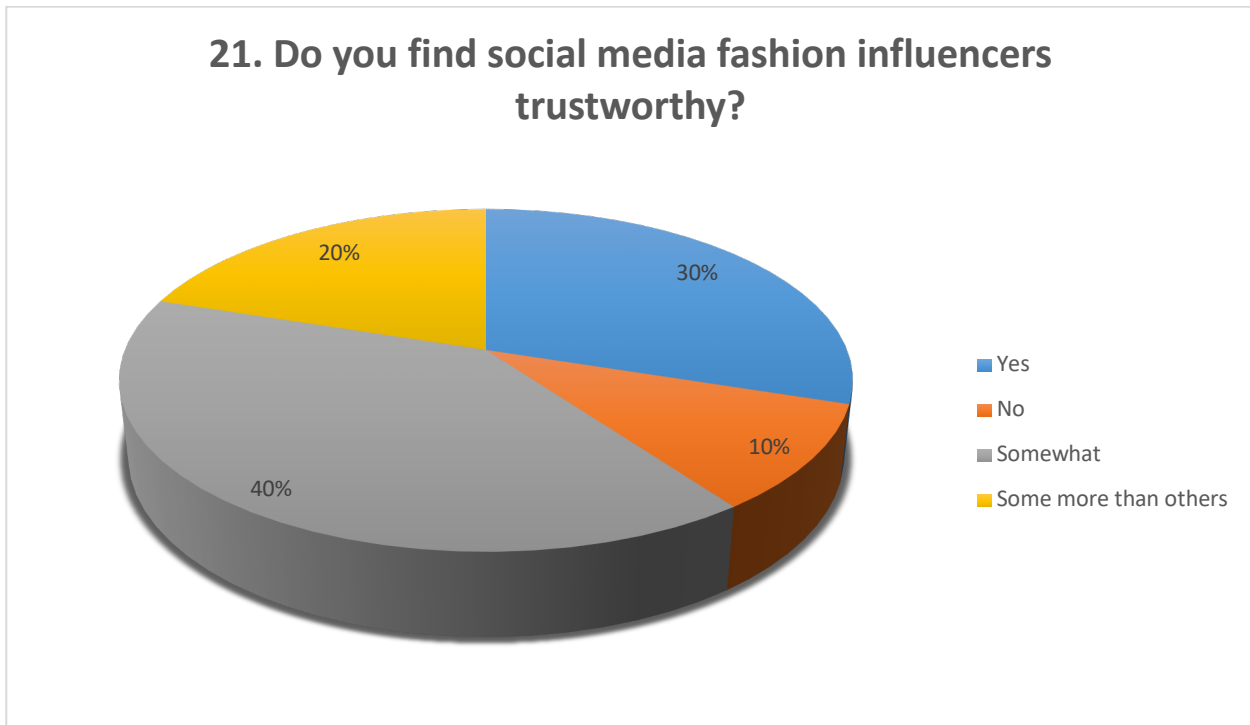
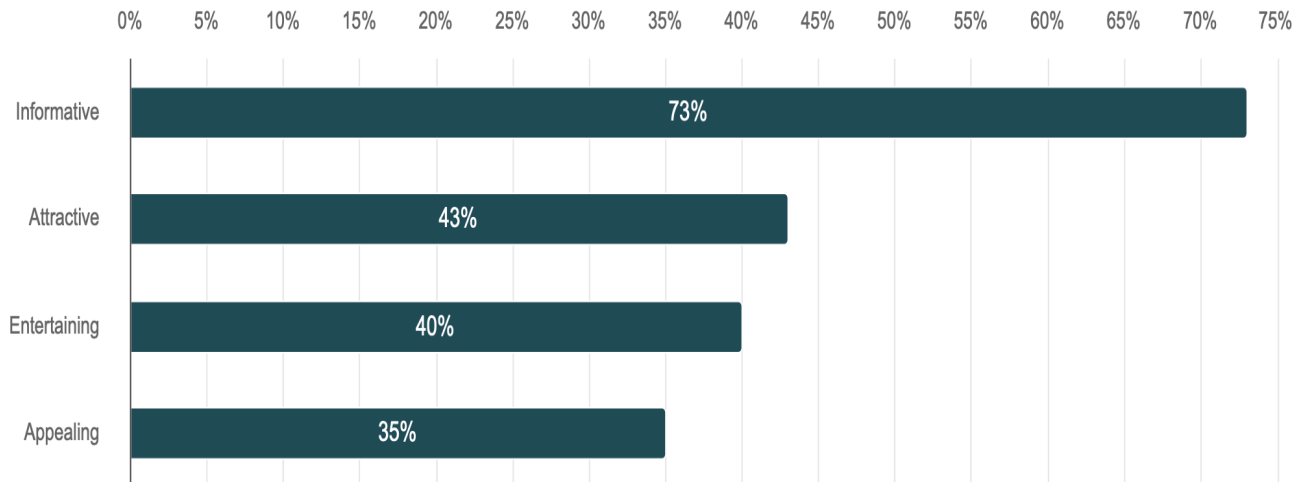


FIGURE 26. Survey Responses to question 21

Regarding the trustworthiness of social media influencers (Figure 26), 30% of the respondents said they have trust in them, while 40% which is a large proportion said influencers are somewhat trustworthy. Moreover, 20% of the total respondent believe not everyone to be trustworthy while 10% find online influencers untrustworthy. Through this result, it can be said that more than a quarter have shown strong trustworthiness with more than 40% have some degree of trust in social media fashion influencers. In addition, the difference in the result responding yes and no is 20% which shows the higher-level trustworthiness among the respondents. As, Berger and Keller's (2016) research found, consumers are more likely to follow recommendations from influencers because they have more "credibility and knowledge". Moreover, social media influencers promote brands through their personal lives by being candid and open, they become more relatable to the average consumers (Berger and Keller 2016).

## 22. The contents of fashion influencers are

Number of respondents: 40 , selected answers: 76



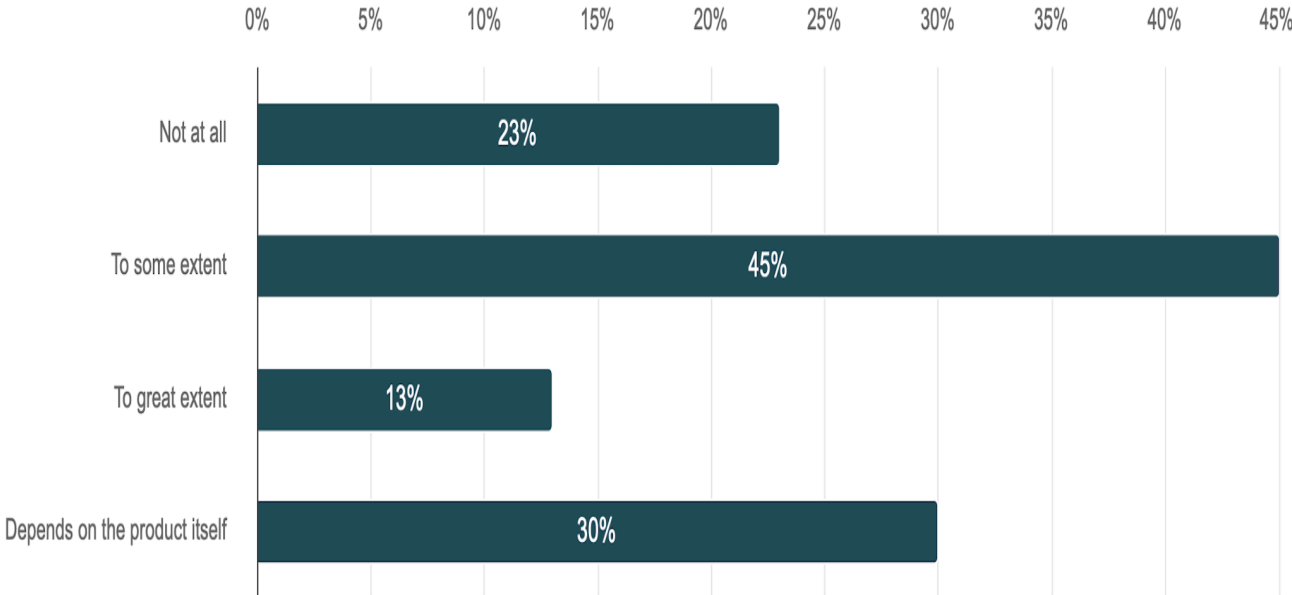
	n	Percent	Percent of Cases
Informative	29	38%	72.50%
Attractive	17	22%	42.50%
Entertaining	16	21%	40%
Appealing	14	19%	35%
Total	76	100%	190.00%

FIGURE 27 and TABLE 5. Survey Responses to question 22

The above bar-graph in figure 27 illustrates that 38% of the total respondents think that they find influencers' content informative, 22% attractive, while 21% and 19% find it entertaining and appealing respectively. The result also indicates that influencers are able to present their content in a very diverse way which attracts their followers for many different reasons. As discussed in the literature review above already, Nandagiri and Philip's (2018) study found that influencers' endorsement significantly influences the "purchasing behaviours" of followers of social media influencers.

**23. Are you persuaded by those influencers in buying any products they promote?**

Number of respondents: 40 , selected answers: 44



	n	Percent	Percent of Cases
Not at all	9	21%	22.50%
To some extent	18	41%	45%
to great extent	5	11%	12.50%
Depends on the product itself	12	27%	30%
Total	44	100%	110.00%

FIGURE 28 and TABLE 6. Survey Responses to question 23

Regarding being persuaded by influencers to buy products they promote, the bar-graph in figure 28 illustrates that 11% said they are persuaded to a great extent, 41% said to some extent, 27% said depending on the product itself and 21% responded not at all. Again, the result illustrates the persuasion power of the influencer is greatly dependent on influencer credibility and the product itself which they are promoting.

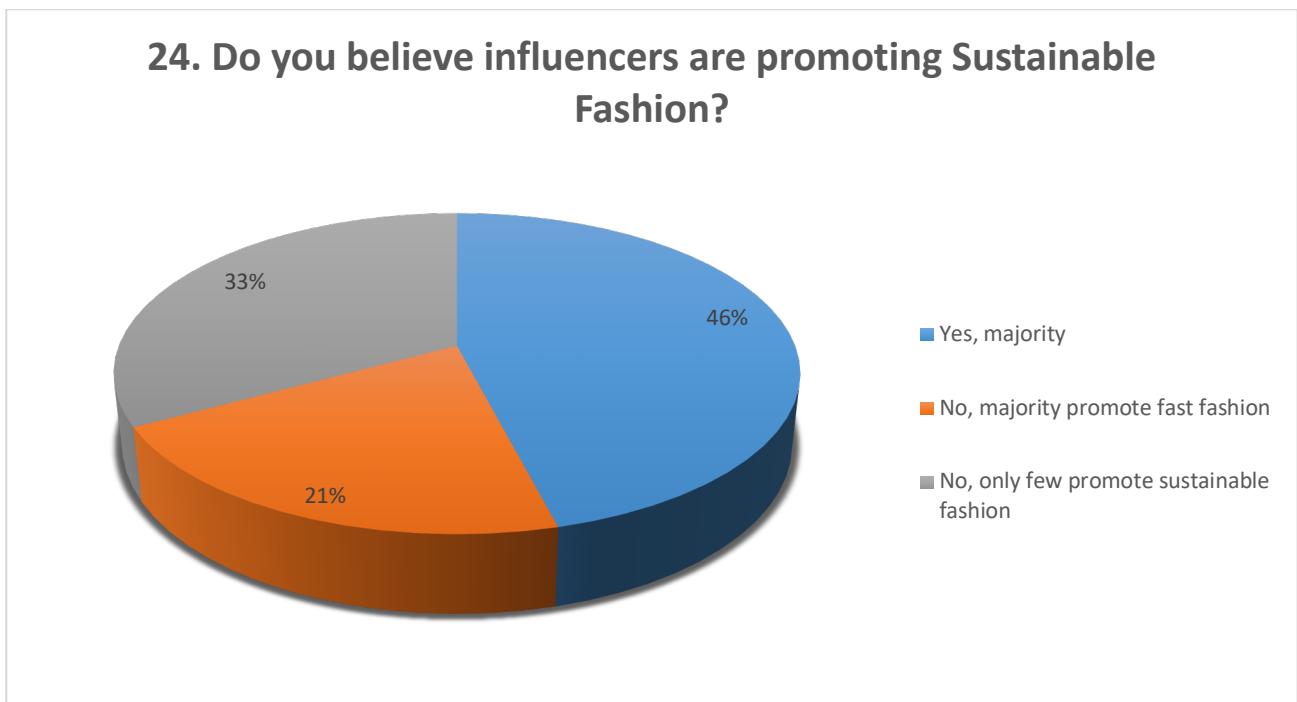


FIGURE 29. Survey Responses to question 24

Above in figure 29 the pie-chart illustrates that 46% of the respondents believe influencers are promoting sustainable fashion while 33% believe very few do the same and 21% disagree with the statement and they believe the majority of influencer promote fast fashion. Through this result, it can be seen that almost half of the respondents believe in the statement and while only a quarter believes the opposite of the statement.

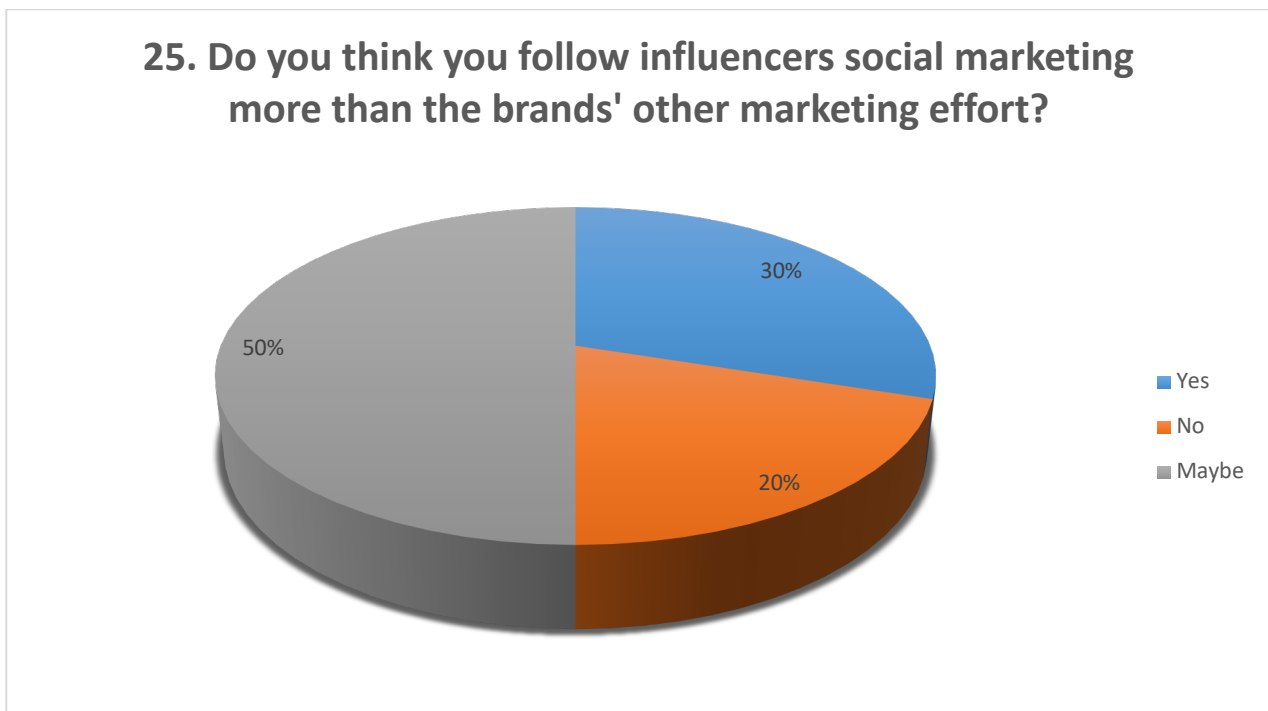
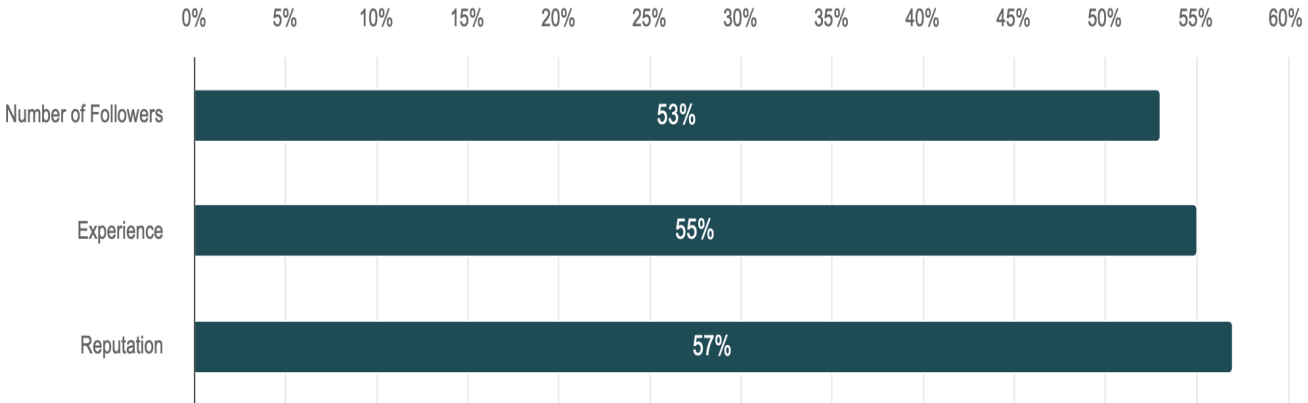


FIGURE 30. Survey Responses to question 25

The above pie-chart in figure 30 demonstrates the result regarding the question if the respondents follow social media marketing influencers more than fashion brands one. 50% of the respondents said they are maybe doing that which can be intentionally or unintentionally. While 30% of the respondents agree with the statement, only 20% said they do not follow influencers' marketing more. As the brands are increasing collaboration with big and micro-influencers in marketing, it is possible that they are visible in the social media feeds of the respondents. Moreover, as the result indicate that the half of the respondent along with another third agreeing with the statement.

**26. What do you look in influencers when you are following their fashion advice?**

Number of respondents: 40 , selected answers: 66



	n	Percent	Percent of Cases
Number of Followers	21	32%	52.50%
Experience	22	33%	55%
Reputation	23	35%	57.50%
Total	66	100%	165.00%

FIGURE 31 and TABLE 7. Survey Responses to question 26

Above in figure 31 the bar-graph illustrates the results regarding the question on what respondent look for in influencers. As the result shows that 32% of said they look for number of followers, 33% said experience and 35% said reputation is the key. As the result is evenly shared, it leads to the theory of influencer credibility where all above-mentioned attributes are necessary to be a credible influencer. Credibility of the source has been suggested as a dominant precursor of attitude toward advertising and ultimately, of advertising effectiveness. Moreover, fashion brands while hiring influencers take note of these attributes to effectively market their products to aware fashion consumers.

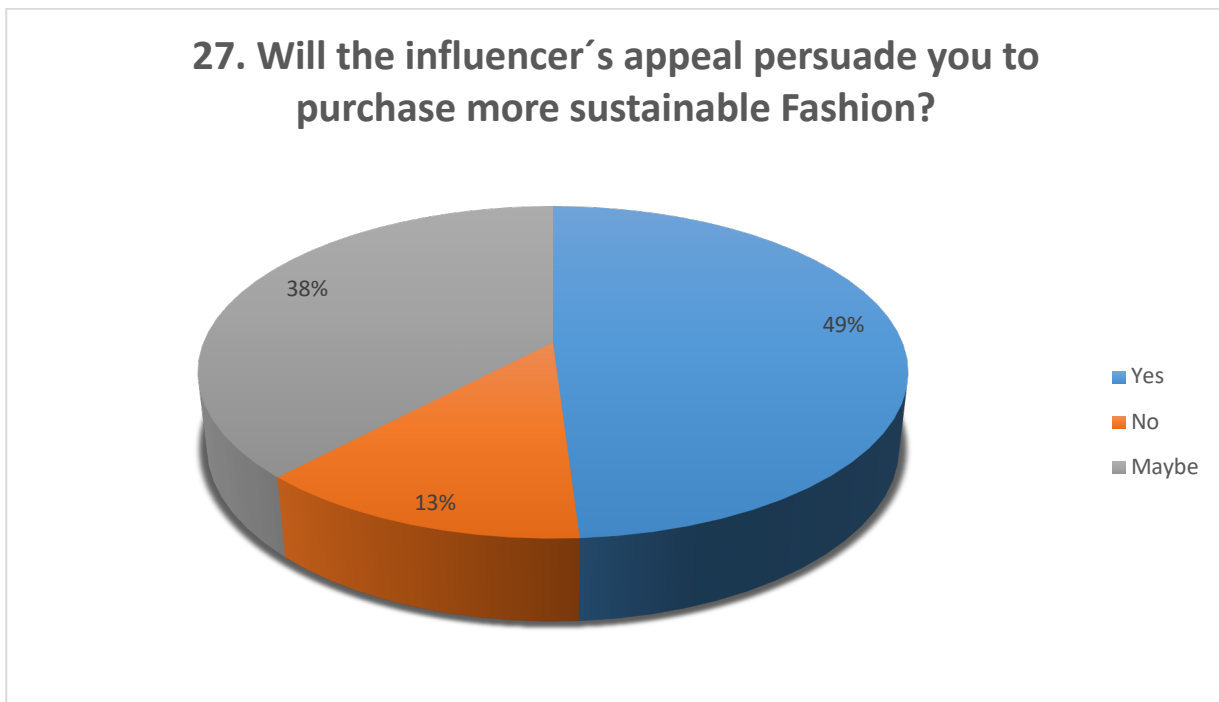


FIGURE 32. Survey Responses to question 27

Above in figure 32 the pie-chart illustrates the survey result regarding the question on purchasing sustainable fashion because of influencer influence. Of the total respondents, 49% said they are persuaded by the influencer's appeal while 38% said they are maybe persuaded and 13% answer no to the question. From this result, we can therefore say almost half of the respondent are persuaded when social media influencers appeal to their followers to purchase and consume more sustainable fashion. In addition, this result also shows the influence and trustworthiness of the online fashion influencers have on their followers where almost the majority are willing to do what is requested.

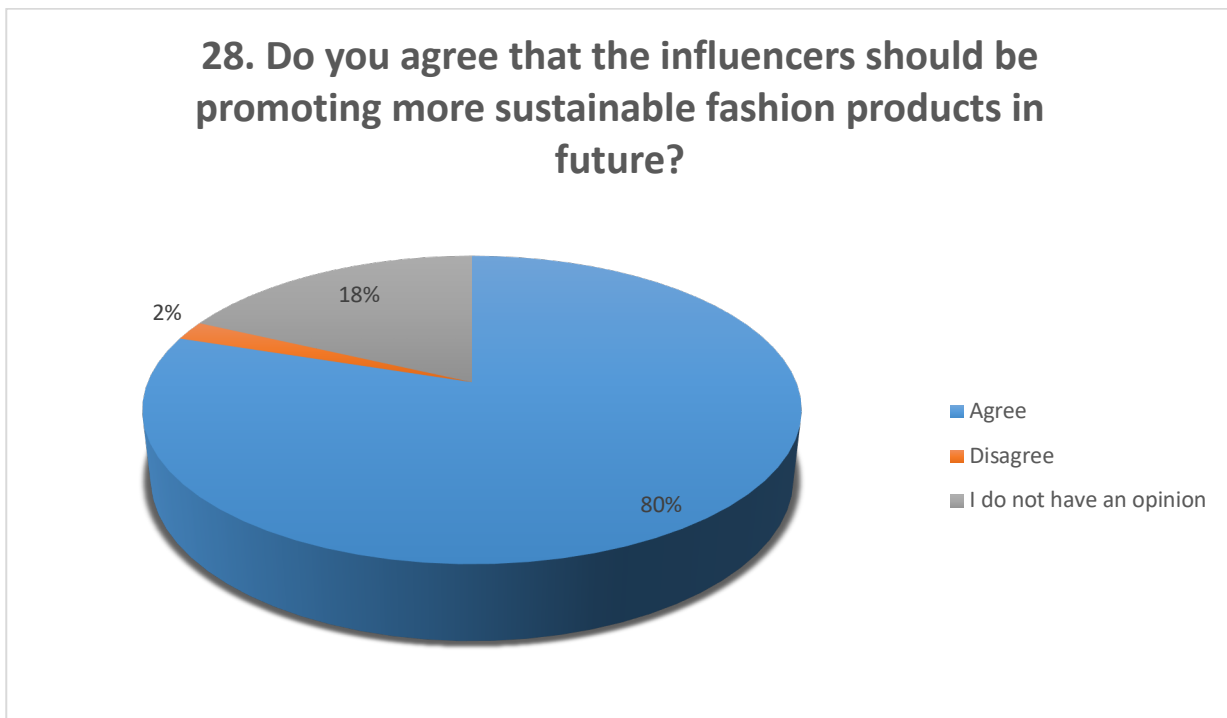


FIGURE 33. Survey Responses to question 28

Regarding the question if an influencer should be promoting more sustainable fashion products in the future, the above pie chart in figure 33 illustrates that 80% of the respondents agree with the statement, 18% said they do not have an opinion on the statement while only 2% disagreed. As the influencer market size is growing which is dominated by both micro and macro influencers, the vast majority wants them to promote more environmentally and socially sustainable products.

## 8 CONCLUSION

The fashion industry has an impact both environmentally and socially and the issue surrounding sustainable fashion is discussed a lot these days in media, in awareness programs and by different brands themselves. Through this research, it can be said that the majority of consumers are aware or have knowledge about sustainability in the fashion industry. For the demographic who has been surveyed in this research fashion is more than just clothing. Rather the fashion represents identity, self-expression, and a way of life for many.

Through the research question 1 (RQ.1), the respondents were surveyed in order to understand the consumer sentiment to sustainable fashion. As the result showed, the majority of the respondents had a good knowledge of sustainable fashion and both its environmental and social impact. Alongside its environmental impact, issues such as exploitation of labour, low wages and bad working conditions were important for the consumers. The survey finding also revealed there is a willingness to consume more sustainable fashion by those who are already aware and those who are not are willing to learn about its negative social and environmental impact.

However, one of the key findings of the research was the gap in attitude and ethical buying behaviour. As already analysed in the theoretical background about the gap in attitude and behaviour, ethics plays an important role in sustainable consumption habit. The researched also revealed that only the consumers with a high level of ethical commitment are more likely to stick to consume sustainable fashion.

In addition, with the help of the secondary research cited in the theoretical part and this research result, it illustrated that the consumers' ethical decision-making process is heavily influenced by other factors such as economic, institutional and social and cultural factors. One of the key finding was that price was the single biggest barrier to sustainable consumption. Ethical and sustainable products are rejected when consumers do not find tangible value or justification to the high prices while choosing sustainable products. Furthermore, the majority of the respondents said they choose fast fashion products very often as they are cheap and convenient in their readily availability nature.

Through another research question (RQ.2), consumers were surveyed on the role of online fashion influencers in impacting consumers' sustainable purchasing habits as well as consumer perception of them towards promoting sustainability. The result indicated the growing influence and following of social media fashion influencer by consumers ultimately having an impact on purchasing habit and overall, the growing market size of these online influencers.

The survey's finding also revealed that, the majority of consumers have a great degree of awareness of these social media influencers, and they follow fashion influencers mainly on Instagram and TikTok. Moreover, the result also revealed that they follow online influencers mainly for the review of the product before purchasing a large proportion have already purchased fashion products on the recommendation of these influencers. Furthermore, a large proportion of the respondents find these influencers trustworthy, informative and entertaining which are key indicators of a growing market size of online influencing.

In addition, the survey findings revealed that consumers are more aware of the marketing effort of fashion brands through online influencers than that of fashion brands' marketing. This indicates the growing use of social media for the fashion purposes. However, on the issue of promoting sustainable products by these online influencers, the research revealed less than half of the respondents think they are doing so. As these online influencers are dominating fashion marketing, the majority of the respondents of the survey believe that social media influencers need to do more to promote sustainable fashion rather than just fast fashion.

Therefore, in order to promote sustainability in the fashion industry, fashion brands who employ these online influencers have a great responsibility as well as opportunity to address the issue. As the survey revealed, the level of awareness is high among the consumers towards sustainability, it presents a great platform for all stakeholders involved to raise awareness and promote sustainable fashion and ethical consumption eventually phasing out fast fashion.

## 9 ANALYSIS AND SUMMARY

The objective of this thesis was to analyse consumer sentiment regarding consumption of sustainable fashion and what role social media influencers play to achieve that. As the primary objective was to understand consumer perception towards consuming sustainable fashion, the research was conducted analysing theoretical framework using existing literatures from different scholars and researchers. In addition, the quantitative research method was employed by using questionnaires for the purpose of collecting and analysing data. For the quantitative research purpose, active fashion consumers and enthusiasts from different social media groups as well as students from Centria UAS were chosen as the research group.

In this thesis the authors have outlined the research questions including the theoretical framework supporting the research problem. In the literature review, different concepts such as sustainability in fashion industry, green marketing, green washing, ethical consumer buying behaviour, and consumer decision making. In addition a literature review was done on the second research question as well, where concepts such as social media influencers, influencer credibility, current and future trends were discussed.

In the data analysis section, data were collected through a survey done online using questionnaires. The quantitative research method used to collect primary data which were obtained to justify the research question. The data were analysed scientifically and supported by the theoretical framework. In addition, the questionnaire was giving utmost importance while drafting in order to obtain data which lead to high validity and reliability. The majority of the respondents were conscious and enthusiastic fashion consumers who were suitable for the demographic group need for this research.

At last, the conclusion includes the key findings which were obtained through secondary research and answers from the questionnaires which were analysed and interpreted in the data analysis section. Therefore, the thesis is able to answer two research questions which are believed to have a high level of reliability considering the whole research process.

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## APPENDIX 1/1

### Questionnaires survey

#### 1. Age

- 18-25
- 26-35
- 36-50
- 50 and above

#### 2. Gender

- Male
- Female
- Non binary

#### 3. Are you interested in sustainable Fashion and ethical consumption?

- Yes
- No
- No idea, I want to learn more about it

#### 4. From where have you heard the term "Sustainable Fashion"?

- From media
- Brand endorsement and advertisement
- From climate activists

#### 5. Are you aware of negative environmental and social impacts of Fashion industry?

- Yes
- No
- I have heard about the issue

#### 6. Are negative environment and social issues (Exploitation of labour and low wage in developing country) is cause of concern for you?

- Yes, they are
- No, they are not
- Maybe, but I want to learn more about it

#### 7. Do you think you have adequate knowledge about "Sustainable Fashion"?

- Yes, I know enough
- No, I do not know, but I would like to learn more about it

#### 8. Is consuming Sustainable Fashion important for you?

- Yes, they are important
- No, they are not important
- No, I do not care about it

#### 9. Are you aware or have knowledge about the term "Fast Fashion"?

- Yes
- No
- I have heard about it

## APPENDIX 1/2

### **10. Do you consume Fast Fashion and why?**

- Yes, because it is cheaper
- No, because I prefer sustainable fashion
- Sometimes, as it is convenient

### **11. Are you willing to pay more in order to consume Sustainable Fashion (better environmentally and socially)?**

- Yes
- No
- Not sure

### **12. Are you aware of Fashion brands attempt of marketing sustainable fashion?**

- Yes, every brand uses sustainable fashion marketing
- No
- Not sure or it does not interest me

### **13. Do you think majority of Fashion brands are embracing sustainable Fashion?**

- Strongly Agree
- Agree
- Disagree
- Strongly Disagree
- There is room for more effort

### **14. When it comes to buying clothing, what is most important to you?**

- Price
- Quality
- Style
- Brand
- Material
- Need
- Brands effort on sustainability

### **15. Do you buy second hand clothing?**

- Yes
- No
- Very often

### **16. If you have unwanted or old clothing, what do you do with it?**

- Throw them away
- Donate
- Sell it
- Keep them in a closet

## APPENDIX 1/3

**17. What social media you use in order to follow fashion news and trends?**

- Facebook
- Instagram
- Twitter
- Snapchat
- Twitter
- TikTok
- Others

**18. Do you follow or are you aware of fashion influencers (fashion reviewers, bloggers) on social media?**

- Yes
- No
- I have noticed them but not followed extensively

**19. Why do you follow fashion influencers on social media?**

- For the review of the product
- Get to know about current fashion trends
- Just for entertainment

**20. Have you ever bought fashion products recommended by any social media influencers?**

- Yes
- No

**21. Do you find social media fashion influencers trustworthy?**

- Yes
- No
- Somewhat
- Some more than others

**22. The contents of fashion influencers are**

- Informative
- Attractive
- Entertaining
- Appealing

**23. Are you persuaded by those influencers in buying any products they promote?**

- Not at all
- To some extent
- To great extent
- Depends on the product itself

**24. Do you believe influencers are promoting sustainable Fashion?**

- Yes, majority
- No, majority promote fast fashion
- No, only few promote sustainable fashion

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**25. Do you think you follow influencers social marketing more than the brands' other marketing effort?**

- Yes
- No
- Maybe

**26. What do you look in influencers when you are following their fashion advice?**

- Number of Followers
- Experience
- Reputation

**27. Will the influencer's appeal persuade you to purchase more sustainable Fashion?**

- Yes
- No
- Maybe

**28. Do you agree that the influencers should be promoting more sustainable fashion products in future?**

- Agree
- Disagree
- I do not have an opinion