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## **Business Report on the Consumer Behaviour and the Role of Retailers in Sustainable Fashion**

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## **List of Abbreviations**

ESG – Environmental, Social and Governance

3Ps – Profit, People, Planet

UN – United Nations

MSCI – Morgan Stanley Capital International

## **1.1 Introduction**

Sustainability and Fashion have had a long-standing history since the industrial revolution. Over the past two decades the world of fashion has evolved. The industry has shifted from forecasting the consumer needs to the ideology of here today gone tomorrow (Bhardwaj & Fairhurst, 2010).

The advancements in production techniques and the widespread presence of marketing have led to the birth of the Fast Fashion business model. This model follows a pattern wherein the anticipation and niche nature of the apparel are compromised for the quick and affordable alternatives. It found birth when the Benetton group diversified their line based on local needs at lower than market prices (Sull & Turconi, 2008). But this trend has had several negative effects on fashion industry and on its triple bottom line (3Ps - Profit, People and Planet). To negate these effects the fashion industry is expected to be more sustainable by adapting ESG (Environmental, Social and Governance) frameworks to monitor and measure sustainability throughout their supply chain.

Kale (2021) in her article for The Guardian also discusses this dichotomy between the Gen Z's consumer behaviour while emphasizing the need to look beyond the Gen Z phenomena. The purpose of this report is to understand the effects of fast fashion practices on sustainability; understand the Gen Z consumers' influence on the current fashion practices and to propose an ESG solution for retailers that would positively influence sustainable consumer behaviour.

## 2.1 Fast Fashion and its Impact

### 2.2.1 Fast Fashion and its Characteristics

Inditex the parent company of Zara is known to be the pioneer of the Fast Fashion model. It is described as a combination of quality and innovative designs combined with speedy response to the market demands which in turn would make fashion affordable (Crofton & Dopico, 2007). Figure 1 shows the characteristics of the fast fashion model that make it possible for it to adapt to the changing demands in the quickest yet cost effective manner (Gupta & Gentry, 2018). The key point to be noted here is that the inhouse design, production, flexibility, supply chain and the marketing strategies together ensure the success of the model and bring in the maximum monetary benefits to the organisation. Analysis of the profit margins of fast fashion and non – fast fashion retailers identified that the fast fashion retailers made more profits to such an extent that the annual growth rate of Zara, a fast fashion retailer was almost twenty times greater than that of Gap, a non - fast fashion retailer (Jin et al., 2012).

<i>Fast Fashion</i>	<i>Conventional</i>
Develop designs in-house	Develop a mix of designer and in-house brands
Most manufacture own products	Most manufacturers outsource manufacturing
Centralized distribution	Regional distribution
Coordinate shipping 24–48 hours	Longer lead times
Small batch production	Large batch production
New products twice per week	Six collections per year
Vary prices by location by country	Standardized pricing
Communication upward from stores = pull system	Communication from corporate = push system
Avoid markdowns on leftovers	Heavy markdowns throughout season, with 40%–50% off
Maintain high profit margins	Lower profit margins than anticipated
Customer identifies brand with store	Just one of many brands
Very little advertising	Heavy advertising
Few or no sales on internet	Heavy use of internet for sales

*Figure 1 Characteristics of Fast and Conventional Fashion (Gupta & Gentry, 2018)*

### **2.2.2 Impact of Fast Fashion on the 3Ps**

- Based on the production practices of the fast fashion industry's water consumption will increase by 50% to 118 billion cubic metres, its carbon footprint will increase to 2791 tonnes, and the amount of waste it generates will reach 148 tonnes (Binet et al., 2019).
- With focus on profit margins the system is focused on reducing costs. Since labour cost contribute intensively towards these margins. Fast fashion seems to be fuelling modern slavery. Research shows that in worst case scenarios labourers are held under captivity to extract work (Buzzo & Abreu, 2019).
- The failure of large companies to investigate the transparency down their supply chain with proper scrutiny led to devastating incidents like the Rana Plaza (Bossavie et al., 2023).
- The fashion industry is the second largest contributor to greenhouse gas emissions, at 10%. Despite that brands like Burberry reported that between 2013 and 2018, it burned or destroyed \$110 million worth of products rather than selling them at a loss and affecting its brand value (Parker, 2022).
- The globalisation of the industry prevents the companies from knowing the working conditions of the labour involved. The companies focus on evaluating the suppliers through performance audits which at most times prioritises productivity and efficiency rather than the labours' levels of satisfaction (Turker & Altuntas, 2014).

## **3.1 Gen Z Consumer Behaviour and Approach towards Sustainable Fashion**

### **3.1.1 Sustainability and ESG in Fashion**

The initiatives taken to meet needs of the present population without compromising the quality of life of the future generations was one of the first definitions of sustainability proposed by the United Nations in 1987 (United Nations, n.d.). The phenomenon started out as a concept centralised on environmentalism but later transformed into a broad context focused on the industrial responsibilities required to ensure a sound future. This included an industries'

environmental, social, business responsibilities along with its corporate governance (Mollica et al., 2009).

The monitoring system for the implementation and the evaluation of sustainability within a business can be monitored through a framework called the ESG (Environmental, Social and Governance) (Singh et al., 2023). This three-pillar framework is also called as the triple bottom line or the 3Ps'. Appendix 1 presents a comprehensive model of the ESG framework. By focusing on these aspects, a business entity will be able to achieve and measure its sustainability in the field (Harvard Business School Online, 2022).

### **3.1.2 The Dichotomy amongst Gen Z Consumers**

There is a strong debate that the fast fashion model was fuelled by the digital natives, the Generation Z. Generation Z refers to the individuals born between 1996 and 2010 and their identity is influenced by digitalization, financial uncertainty, the Covid – 19 pandemic and climate change (McKinsey, 2023). Whereas there is also a school of thought that talks about how in the Gen Z era sustainable fashion is bound to stay.

Thanks to the high levels of awareness, the fast fashion trend now has counterpart called slow fashion (Fletcher & Grose, 2012). Deriving heavily from the slow food movement, slow fashion is focused on making the end-to-end process of the fashion cycle better. It is focused on the quality rather than the speed to market. The approach of the individuals involved in the fashion cycle is different (Fletcher, 2007). Sustainable fashion is a part of the slow fashion concept and is more than buying from companies that say they are sustainable. It considers the social, natural, and economic variables in the production process (Henninger et al., 2016). Appendix 2 presents the journey of sustainable fashion and Appendix 3 presents a timeline of the historical events in the realm of sustainable fashion.

The Gen Z population are expected to be the largest users of fast fashion but at the same time they do have a high level of awareness about slow fashion (Kale, 2021). Several research endeavours have tried to understand Gen Z's consumer behaviour towards these ideologies and the following results emerge.

### **3.1.3 The Consumer Behaviour of Gen Z**

These are some of the observations made on the consumer behaviour of GenZ towards fashion

The consumer behaviour of the Gen Z population is largely influenced by the larger context more than their personal opinions which can be justified by the influence of social media and the influencer culture (Antunes et al., 2023). With pressure to be more sustainable companies are using the concept of green washing to create a false image amongst the consumers but the consumers do have a perception about it which is why they do not trust in the sustainable fashion industry (Donna Louisa & Paramita, 2023). But the intention to be sustainable exists amongst the generations and they might be unintentional or intentional based on the level of knowledge in to the industrial practices (Williams & Hodges, 2020).

But, the significant point that influences the consumer behaviour is the value action gap. This refers to the position where the consumer can see the value to the concept but their this a hindrance in between that prevents them from taking action. In most of the situations the hindrance would be the premium price involved (Williams & Hodges, 2022), the aesthetics involved (Jung et al., 2020).

## **4.1 Role of the Retailer**

### **4.1.1 ESG Model for Fashion**

Based on the Gen Z consumer behaviour and the value – action gap identified, it is evident that consumers are at crossroads between fast fashion and sustainable fashion. When the sustainable and non – sustainable fashion consumers were compared, the sustainable consumers expressed higher concern for the environment, conscious fashion choices and recommended the ideology (Blas Riesgo et al., 2023).

The non-sustainable consumers' main concern was the lack of trust in the retailers' sustainability statements and practices and this needs to be addressed by the retailers. Hence the role of the retailer to help consumers make the right decision and contribute towards sustainable fashion is crucial.

In association with the UN, Accenture presented a report recommending a new ESG model exclusive for the retailers in the fashion industry. This report presented a prioritised ESG model wherein there was no segmentation of the goals but rather a collective that is interconnected. Figure 3 presents the ESG framework recommended by Accenture for fashion retailers. One of the ESG solutions recommended is engaging with consumers. This specific goal would help retailers understand and accommodate to the consumer behaviour of the Gen Z population (Accenture, 2022).

The proposal recommends three primary areas of attention: Actively involving the consumer, ensuring transparency and traceability of sustainability efforts and educating the customers.








1 Raw Materials 	2 Climate 	3 Chemicals 	4 Fair Labor 
<b>Industry Goal/Objective</b>			
<p>Aligned to <a href="#">Textile Exchange's 2030 Strategy, Climate</a>—by 2030, achieve a minimum of 45% reduction in GHG emissions within textile fiber and raw material production from a 2019 baseline</p> <p>Aligned to <a href="#">UNFCCC Fashion Charter</a>—source 100% of <a href="#">priority materials</a> that are both preferred and low climate impact by 2030, ensuring that these do not negatively affect other Sustainable Development Goals</p>	<ul style="list-style-type: none"> <li>Set SBTi-approved reduction targets on emissions (Scope 1, 2, 3) within 24 months, and commit to achieve net zero emissions no later than 2050, or</li> <li>Set a target of at least 50% absolute total emissions reductions (Scope 1, 2, 3) by 2030 against a baseline of no earlier than 2019, and achieve zero emissions no later than 2050</li> <li>Secure 100% of electricity from renewable sources for owned and operated (Scope 2) emissions by 2030</li> </ul>	<ul style="list-style-type: none"> <li>Work with suppliers towards toxic-free production, the disclosure of chemical use and wastewater management data</li> <li>Target zero discharge of hazardous chemicals in supply chain, including eliminating manufacturing restricted substances list (MRLS) chemicals</li> <li>Increase transparency about hazardous chemical discharges, including quantification, standard reporting on chemical-use and wastewater, and annual auditing</li> </ul>	<ul style="list-style-type: none"> <li>Implement fair compensation program</li> <li>Commit to responsible recruitment</li> <li>Implement empowerment and education programs in and around supply chain communities</li> <li>Consider auditing and remediation beyond Tier 1 at textile mills and farms</li> <li>Uphold human rights, health and safety standards across supply chains</li> </ul>
<b>2022 Key Actions</b>			
<ul style="list-style-type: none"> <li><b>Collect</b>, track and monitor data on raw material supply chain, enabling transparency and sustainability shifts</li> <li><b>Increase</b> use of recycled and standard-certified materials, transforming raw material sourcing practices</li> <li><b>Invest</b> in de-risking and scaling innovative materials and circularity, shifting raw material sourcing strategies</li> </ul>	<ul style="list-style-type: none"> <li><b>Quantify</b>, track and publicly report via CDP on GHG emissions, including Scope 1, 2, and as feasible Scope 3</li> <li><b>Set</b> and submit reduction pathway plans for 2030 goals aligned with the SBTi framework</li> <li><b>Adopt</b> renewables, energy reduction and efficiency measures in Tiers 4, 3, 2 aligned with UNFCCC and RE100</li> </ul>	<ul style="list-style-type: none"> <li><b>Commit</b> to eliminating hazardous chemicals and wastewater management, including sourcing from standard-certified wet processing facilities</li> <li><b>Evaluate</b> products against harmful chemicals and develop policies for improvement, including audits and regular testing of wet processing facilities</li> <li><b>Disclose</b> wastewater data and supplier list, including suppliers involved in wet processing and publishing data</li> </ul>	<ul style="list-style-type: none"> <li><b>Commit</b> to upholding and protecting workers' rights through fair labor and compensation policies, and improving health and safety conditions</li> <li><b>Implement</b> commitments to responsible recruitment and empowerment, including programs to support DEI and environmental justice</li> <li><b>Establish</b> workplace-based programs to empower and educate workers in and around the global supply chain</li> </ul>
5 Sustainability Measurement 	6 Innovation & Circularity 	7 Engaging Consumers 	
<b>Industry Goal/Objective</b>			
<ul style="list-style-type: none"> <li>Best practice benchmarking, measurement, and target setting across ESG factors using vetted, uniform measurement protocols</li> <li>Track and publicly report material metrics, including GHG emissions, consistent with standards and best practices of measurement and transparency</li> </ul>	<ul style="list-style-type: none"> <li>Initiate phased transition to source 100% of priority materials that are both preferred and low climate impact in support of 2030 goals</li> <li>Pursue materials that are closed-loop recycled, deforestation free. Apply regenerative practices, and ensure that relevant verification and impact measurement mechanisms have been applied</li> </ul>	<ul style="list-style-type: none"> <li>Communicate progress to consumers on corporate ESG goals, including the climate goals prioritized in the <a href="#">UNFCCC Fashion Charter</a></li> <li>Align consumer and industry communication to a 0.5-degree or SBTi compatible pathway, and a more just and equitable future</li> <li>Develop industry standards for communicating the ESG impact of products</li> </ul>	
<b>2022 Key Actions</b>			
<ul style="list-style-type: none"> <li><b>Assess</b> materiality on the path to developing a comprehensive sustainability strategy, governance, goals and measurement</li> <li><b>Commit and quantify</b> tracking progress on ESG goals—GHGs, water, materials, labor conditions and more</li> <li><b>Publicly</b> report, and move toward automated sustainability reporting, improving on data structures and digital transformation efforts</li> </ul>	<ul style="list-style-type: none"> <li><b>Develop</b> circular economy strategies and action plans, referencing best practice frameworks and initiatives</li> <li><b>Execute</b> on circular strategies and plans to "initiate the loop", including alternate business model pilots and execution</li> <li><b>Invest</b> in solutions and innovative business models to "slow and close the loop", including infrastructure, design, platforms</li> </ul>	<ul style="list-style-type: none"> <li><b>Engage</b> consumers, providing options for customers to get involved in the sustainability journey and become part of the solution</li> <li><b>Drive</b> transparency of sustainability efforts, providing data and traceability for consumers, using effective product labeling</li> <li><b>Educate</b> consumers about the brand's investments in sustainability initiatives and overall ESG commitments</li> </ul>	

Figure 2 ESG for Fashion (Accenture, 2022)

#### **4.1.2 Actively Involving the Consumer**

This action plan does not refer to passively interacting with the consumer through the marketing practices but it is rather focused on providing consumer solid evidence that their contributions would be put to good use.

For instance when a consumer decides to participate in an afforestation programme by buying sustainable clothes from a retailer they should be able to track their contributions. A proposed solution could be the sharing of a QR label that gives them access to the afforestation programme's website that would allow them to know when and where the tree was planted and if it was done through ethical labour practices.

#### **4.1.3 Transparency and Traceability of Sustainability Efforts**

This aspect allows for consumers to know the efforts taken by the company in order to be sustainable. Although this is information sharing in the simplest terms, the way they are presented plays a key role.

Maratos (2023) suggests that for the industry to push consumers to make sustainable choices allowing them to see that the company is doing their part is vital. This cannot be limited to the retailers and their immediate suppliers but it should rather be an end to end transparency wherein the suppliers from all tiers should be taking active steps.

#### **4.1.4 Educating Consumers**

The advent of social media has favoured educating the consumers. True sustainability would be possible only if the industry integrates as a whole and educates the consumer without considering competition. The numerous associations mentioned in the timeline in Appendix 3 were formed with this motive.

Any move made by any company as an innovative solution to sustainability should be shared with the consumers and maximum reach should be ensured. This can be made possible through face to face or online discussions by influencers sponsored by the industry. If the consumer has an idea that the industry together is trying to push for sustainability then the consumer would definitely think twice before making fast fashion choices.

## **5.1 Conclusion**

The chequered history between sustainability and fashion has always been under debate, and it cannot be denied that the relationship has been reactive rather than proactive. This can be supported by the fast fashion business model that stands for everything against sustainable fashion. Fast fashion started out as a business model to improve on the profit margins it is fuelled by rapid consumerism. Extorting on the endless buying behaviour of consumers, the model places the consumer at the epicentre and relies on their impulsivity to operate (Ethical Consumer, 2023).

But based on the effects it has had on the triple bottom line it is time for change and this change as mentioned in the report can only be made possible if the consumer is aware of the operations of the fashion industry. This awareness can be initiated only if an end-to-end transparency model is introduced within the supply chain followed by engaging the consumers to interact with the information that is made available through the model.

## **6.1 Self Reflection**

### **Writing Strategy**

This business report on the sustainable fashion from my perspective required a deep dive into research into the market and the available research. This remained my focal point through the preparation of this report. The idea was to go wide and not deep given the word count constraint. Hence the focus was narrowed down to produce quality work based on solid research data while expanding on a broad context.

### **Areas demanding Further Development and Future Adaptations**

While the environmental aspect of the ESG framework has been explored, it needs to be analysed further along with the other two pillars of the framework. I would also like to create a database of the ESG framework proposed by researchers and academicians and try to analyse the similarities and differences between them since there is a vast source of data available in this realm.

Additionally, the concept of designing customer centric sustainability goals has piqued my interest. While organisations focus on submitting reports to certifying bodies the real data needs to be emphasized to the consumer for real change to be seen.

To develop on this, I intend to read up on the concept and I'd also investigate its potential to be considered for my dissertation.

## **Areas for Potential Improvement**

I recognise that the work needs to be more concise in presenting ideas and a better command over language would help me achieve it. While topics of relevance have been included in the appendices presenting them in the main body would've allowed for the report to look more well-rounded.

## **Strengths of the Work**

This business report is systematic. I have managed to bring in the right flow between the topics by finding research papers that connect them which can hold the readers' attention for a longer time. This report although small can be considered as a starting point for a fashion label to consider incorporating sustainability based on the consumer behaviour of the Gen Z population in mind.

## **Key Learnings**

The following were my key learnings from the report.

- Sustainability extends way beyond climate change and waste disposal it encompasses the economic differences between countries and the factors that fuel it.
- Knowledge is key when it comes to implementing sustainability within an organisation.
- Sustainable fashion and fast fashion co – exist currently.
- Understanding and addressing the value – action gap of the Gen – Z needs to be prioritised to shift to the sustainable fashion model.

## Strengths and Weaknesses of the Researcher

Strengths	Weaknesses
Proper planning facilitated by breaking down the research plan into small daily tasks.	Balancing part time work and meeting the project deadline.
Clear estimate of the trajectory of the research was devised in the beginning.	Intention to be perfect added additional pressure.
The standard APA style of referencing and reporting was used to maintain a formal presentation of the report.	Not being concise because of trying to explore the topic deeply.
Good intuition towards addressing the hindrances that affected the overall flow of the points within the report.	Difficulty with allotting equal amounts of time and effort to multiple projects during the same time frame.

*Table 1 Strengths and Weaknesses of the Researcher*

## Appendices

### Appendix 1: ESG Framework

For the past two decades business stakeholders have been focusing on the long-term sustainability within their business models rather than just the profit. This practice made more sense when it was extended into their respective supply chains. While the three pillars remain common, the areas they encompass are dynamic. Figure 3 shows one of the most comprehensive ESG models. Players within the fashion industry also adhere to ESG frameworks.

MSCI ESG Score									
ENVIRONMENT PILLAR				SOCIAL PILLAR				GOVERNANCE PILLAR	
Climate Change	Natural Capital	Pollution & Waste	Env. Opportunities	Human Capital	Product Liability	Stakeholder Opposition	Social Opportunities	Corporate Governance	Corporate Behavior
Carbon Emissions	Water Stress	Toxic Emissions & Waste	Clean Tech	Labor Management	Product Safety & Quality	Controversial Sourcing	Access to Finance	Board	Business Ethics
Product Carbon Footprint	Biodiversity & Land Use	Packaging Material & Waste	Green Building	Health & Safety	Consumer Financial Protection	Community Relations	Access to Health Care	Pay	Tax Transparency
Financing Environmental Impact	Raw Material Sourcing	Electronic Waste	Renewable Energy	Human Capital Development	Privacy & Data Security		Opportunities in Nutrition & Health	Ownership	
Climate Change Vulnerability				Supply Chain Labor Standards	Responsible Investment			Accounting	
					Chemical Safety				

■ Universal key issues applicable to all industries

Figure 3 Comprehensive ESG Framework (MSCI, 2023)

## Appendix 2: A Short History of Sustainability in Fashion

The fashion industry is no stranger to sustainability and has a long-standing history with the subject. The relationship became possible only after the Industrial Revolution which led to the development of modern tools and machinery that accelerated the production lines and forever changed the world of fashion. While the first few decades of sustainable fashion focused on the environment, the first social impact of fashion relating to sustainability was presented by the Bloomsbury group. Although a solo event they questioned the elaborate systems of the elitists of the Victorian era. This would go on to influence the attention paid to dailyness aspect in contemporary fashion in the years to come (Fletcher & Tham, 2015).

The discussion of sustainable fashion began in the 1940s when issues with production arose primarily due to the usage of hard to degrade synthetic fibres and the exploitation of labour. The release of the book ‘Silent Spring’ in the 1960s explored the effect of pesticides on fibres. Another milestone in sustainable fashion was the Espirit’s ecollection which performed an Eco – audit of the line’s collection in 1992 (Holroyd et al., 2023). Appendix 1 presents a timeline of all the key events that impacted sustainable fashion.

### Appendix 3: Timeline of critical events within Sustainable Fashion

Year	Event
1970	Hippies introduce sustainable fashion by choosing handmade, second – hand clothing as a counterculture to mass consumerism
1989	World Fair Trade Organization an association with 401 participating organizations is established to support under privileged entities within the fashion supply chain
1989	Clean Clothes Campaign an initiative to ensure human rights are honoured within the fashion industry is established.
1997	The Global Reporting Initiative an NGO focused on transparency for the benefit of the bigger lot was founded.
2002	The Global Organic Textile Standard a certification board recognising the standard processing procedures for organic fibres was formed.
2007	The concept of associating fashion to support a cause and make a statement was proposed by Kate Fletcher and was called Slow Fashion.
2009	The Sustainable Apparel Coalition a collaboration between the different entities within the fashion supply chain along with academicians is formed with the primary goal to reduce the damage to the environment by the footwear and clothing industry was formulated.
2010	<p>This year saw a lot of events that emphasised sustainable fashion. The Ellen Macarthur Foundation focused on circular economy was created.</p> <p>The Green Carpet Challenge an initiative promoting eco – friendly dresses to red carpets was launched.</p> <p>The EcoChic Fashion Show encouraging the preservation of biodiversity was launched by the United Nations (UN)</p>

<b>2011</b>	<p>The Alliance for Sustainable Fashion was formulated by the UN to prevent environmental and social practices that affect the fashion industry.</p> <p>FairTrade USA a certification label is introduced to assure consumers that their purchases are from a fashion supply chain that is ensures safe working environments and fair pay.</p> <p>Detox My Fashion a move to push big players into taking control over the pollution rates in their supply chain saw 80 organisations commit to eliminate hazardous chemicals by 2020.</p>
<b>2012</b>	<p>Sustainable Apparel Coalition developed the Higgs Index which consisted of a myriad of tools that helped quantify the impact of the company on its environment.</p>
<b>2013</b>	<p>It was the year of realisation when the famous rana plaza incident happened causing the fashion industry to question the transparency amongst their supply chain partners.</p>
<b>2015</b>	<p>A documentary called The True Cost unveiled the effects the fashion industry had on the environment, the society, and its economy.</p> <p>The European Clothing Action Plan was launched to address the tonnage of material wastes produced by the industry and to promote circular economy.</p>
<b>2016</b>	<p>A platform to share resources related to sustainability in fashion and products was established under the name Common Objective.</p>
<b>2017</b>	<p>A New Textiles Economy: Redesigning Fashion's Future – A revolutionary report identifying the detrimental effects of the linear system was presented and discussed at the Copenhagen Fashion Summit alerting the industry that change was expected.</p>
<b>2018</b>	<p>The Alliance for Sustainable Fashion was formed by the UN to promote the collaboration between governments, for and not for profit organizations.</p>
<b>2020</b>	<p>The 2020 Circular Fashion System Commitment was signed and was successful at ensuring industrial giants like Adidas and H&amp;M implemented circular fashion within their supply chain.</p>

*Table 2 Timeline of crucial events within sustainable fashion*

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