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SUSTAINABILITY CUES IN FASHION: PRACTITIONERS' AND CONSUMERS' PERSPECTIVES

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ABSTRACT

This research examines the alignment between fashion practitioners' and consumers' perceptions of sustainability cues in the fashion industry by employing qualitative techniques. The findings reveal some divergences between their perspectives, underscoring the industry's challenge in effectively communicating and integrating sustainability into the fashion narrative, to better align with consumer expectations.

Introduction

Sustainability is a major societal concern and lies at the heart of a new business paradigm. With 86% of companies seeking to market sustainable products (Globescan, 2020), and 79% of consumers willing to change their purchasing habits due to social or environmental impacts (Capgemini, 2020), brands are increasingly introducing sustainability claims in their value propositions (Deloitte UK, 2021). However, it is difficult for audiences to judge which brands are genuinely committed to sustainability (Connelly et al., 2011a). How companies use cues for signaling their commitment to sustainability and how these are judged by consumers is consistently pointed out as an important - but overlooked - research opportunity (Connelly et al., 2011b; White et al., 2019).

Signaling theory is widely employed in business literature to investigate how the information asymmetry between sender and receiver affects the signal's visibility and interpretation (Bergh et al., 2014). Yet, signaling theory is rarely employed for understanding how consumers interpret (and respond to) brand cues, particularly sustainability cues. Extant research grounded on signaling theory for investigating sustainability themes predominately examines corporate responsibility and commitment (Crilly et al., 2015; Yim et al., 2019). As it is mainly employed for investigating investors, job seekers, and other organizational stakeholders (Bergth et al., 2014), the body of literature anchored on signaling theory attempting to explain how sustainability cues are signaled and interpreted by consumers is insufficient. As a result, even though brands increasingly aggregate sustainability cues of varied types in their signaling, it is unclear how consumers interpret and evaluate such signals. In this vein, this research aims to reconcile what the fashion industry attempts to communicate (sender) with how consumers (receiver) evaluate (and act on) those signals. Informed by signaling theory, the current

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study aims to explore which sustainability cues are more recognizable and valued by customers, from the perspectives of both practitioners and consumers.

Theoretical Background
Fashion and Sustainability
The fashion industry has earned the interest of academic research, considering that is globally accountable for significant social and environmental impacts, such as one of the largest carbon emission footprints (Kim & Seock, 2019; Kumar et al., 2021; Rausch & Kopplin, 2021). Notwithstanding, most empirical studies in this context tend to examine psychological factors (e.g., Kim & Seock, 2019; Legere & Kang, 2020), without addressing which specific sustainability cues are more valued by consumers. Hence, it is important to develop an enriched understanding of how to promote sustainable fashion products. Buying fashion products enfolds complex motivations, with diverse types of sustainability claims used for attracting customers (Perry & Chung, 2016; Rausch & Kopplin, 2021). Besides price, comfort, quality judgments, social approval, and/or aesthetics, fashion brands increasingly focus on sustainability cues. Contrarily, there is an insufficient understanding of which types of attributes are effective for modifying the purchasing habits of consumers or bridging the attitude-behavior gap (e.g., Park & Lin, 2020; Rausch & Kopplin, 2021).

Signaling Theory
Two levels of signaling are accounted for in signaling theory and are associated with consumer mental processes (Connelly et al., 2011). The first is the signal's cost and observability. While the former is implied in transaction costs, the latter is namely represented by the signal's clarity (e.g., addressing potential distortions between sender communication and receiver interpretation) and intensity (e.g., the signal's strength). The second is the receiver's interpretation (e.g., weights applied to the diverse signals emitted) and feedback (e.g., responsive countersignals that serve to either reinforce the signal and/or create distortion, affecting the receiver's interpretation). We argue that product features are instrumental cues for consumers to evaluate its perceived value across multiple dimensions. Sustainability is one of these. For sustainability-conscious consumers (e.g., receivers), price and other potential trade-offs (e.g., sacrificing functionality, social approval, aesthetics) could be interpreted as the transaction cost of choosing the sustainable option.

Methodology
We followed a qualitative approach to elicit the most salient sustainability cues in fashion products, and gain insights about how these influence purchasing decisions, according to the perspective of fashion professionals and consumers. Two studies were conducted and analyzed separately by the same researchers, following a structured protocol, to uncover thematic patterns and meanings, and subsequently, assign them to theoretically relevant units of analysis informed by literature (Patton, 2015).
The purpose of study A was to collect insights about which types of sustainability attributes are more valued by fashion consumers, according to fashion practitioners. Eight in-depth interviews were conducted online with fashion practitioners based in South European countries. The sample presents a diverse occupational and socio-demographic framing, representing the perspective of fashion entrepreneurs, retailing, and manufacturing firms.

Study B aimed to corroborate (or contradict) the insights obtained from professional informants, about the most influential sustainability attributes for consumers. Group discussions were stimulated to explore the perceptions, beliefs, and motivations of fashion consumers. A semi-structured script was developed to elicit prevalent sustainability cues and how trade-offs with other types of attributes are managed. Twelve South European consumers participated in two focus groups conducted online. Participants represent a balanced sampling frame in terms of gender, age, occupation and educational background.

Results and discussion
Practitioners' Perspective
In Study A, the focus was on the perspectives of fashion practitioners. Five themes emerged as more prominent. First, the impact of price and promotion is deemed as relevant, and stronger than other attributes. Willingness to pay, budget availability, and income are also recurring elements. Second, the results indicated a strong emphasis on materials and fiber sustainability, with frequent mentions of organic and recycled materials. Thus, according to firms' perspective, there is a significant consumer trend towards more environmentally responsible material sourcing. Another key finding was the emphasis on the country of origin of products. This aspect was often associated with sustainability, suggesting that consumers, according to practitioners, may perceive local or regional production as more sustainable, potentially due to shorter supply chains and reduced carbon footprints. Practitioners also placed considerable importance on eco-labels and certifications. This can underscore a recognition of the value of third-party verification in sustainability claims, which could be a response to increasing consumer scrutiny and a desire for transparency in sustainability practices. However, sustainability branding, along with purchasing channels, was deemed less relevant. Third, it seems that the product type can have an impact on consumers' perceived sustainability: trousers/jeans, t-shirts, and outwear are the most relevant types, according to practitioners. Fourth, the opinion of practitioners is that other levers that traditionally impact garment choice do not seem to be so important when the discourse revolves around sustainability. Some examples, among others, are quality of materials, durability, performance, design/style, and brand. This shift may indicate a potential realignment of industry priorities, where sustainability is becoming as important, if not more, than conventional fashion drivers. Finally, professionals acknowledge the impact of shopping experience and personal traits, such as shopping behavior, sensorial/emotional involvement, individual differences, sustainability concerns, attitude toward fast fashion, and consumers' short-term orientation.

Consumers' perspective
Study B shifted the focus to consumers, leading to five relevant themes. First, the price lever plays a crucial role: among the most frequent elements, price, willingness to pay, value for money, and promotion can be considered to impact shopping behavior for fashion products. Second, material choices are important, along with eco-labels. Interestingly, something that emerged from consumer discourses is the relevance of fair labor and environmental impact. Country of origin and sustainability branding were also cited. Third, the product category would seem to matter less in the choice, and the most frequently mentioned products are sportswear, jeans, and t-shirts. Fourth, there was a noticeable increase in the emphasis on quality (materials, durability, performance) and attention

toward garment comfort. Other relevant levers are design/style, versatility and multifunctionality, and brand. Thus, their focus seems to be more on the immediate appeal of the product. Moreover, the occasion of use and the peer recommendations also play a role in the purchasing decisions. Finally, consumers seem to be concerned about the impact of their choices on sustainability, along with the issue of greenwashing.

A comparison of the two perspectives
The comparison between the perspectives of practitioners and consumers in the fashion industry regarding sustainability reveals differences and similarities. Figure 1 shows a summary of the most salient attributes. Practitioners emphasize sustainable materials and fibers, highlighting an industry trend towards environmentally responsible sourcing. They also value eco-labels and certifications, indicating a preference for validated sustainability claims. The country of origin is another significant factor for them, suggesting a link between sustainability and local production. Consumers, while also valuing sustainable materials, place greater emphasis on design/style, brand, and quality. This indicates that non-sustainability-related factors still influence their purchasing decisions. The key similarity lies in the acknowledgment of sustainable materials as important. However, the divergence is clear in the weightage given to non-sustainability factors: practitioners lean more towards ethical considerations, while consumers balance sustainability with traditional fashion values. This highlights the industry's challenge in aligning sustainability with consumer preferences and underscores the need for effective communication and integration of sustainability into the fashion narrative.

Conclusion
The comparative analysis of both studies reveals a complex landscape of sustainability in the fashion industry. While there is a common ground in valuing sustainable materials, the priorities diverge beyond this point. Practitioners appear to be adopting a more holistic sustainability approach, potentially driven by industry trends, ethical considerations, and expected market demands. This is evident in their emphasis on organic/recycled materials, eco-labels, and country of origin - aspects that speak to a broader sustainability narrative encompassing environmental, social, and economic dimensions.

Yet, consumers, although not unaware of sustainability, seem to integrate these considerations within a more traditional framework of fashion consumption. Their decisions seem still predominantly influenced by design, style, and brand elements. This suggests that while sustainability is on their radar, it has not yet become a predominant factor in their purchasing decisions.

The discrepancy between practitioners' and consumers' priorities highlights a key challenge for the fashion industry: the need to effectively communicate and market the sustainability aspects of products in a way that resonates with consumers' existing values and preferences. There is an opportunity for brands to educate consumers about the importance of sustainability features and to integrate these features more seamlessly into the overall value proposition of their products. The industry might need to find innovative ways to make sustainability a part of the fashion narrative, not just an add-on or a niche feature, to better align with consumer expectations and preferences. Artificial intelligence (AI) can contribute by analyzing data on waste production, collection, and disposal. AI can improve efficiency, reduce waste, and promote innovation in the fashion sector.

This research has some limitations, which need to be addressed in future research. First, since it is a qualitative and exploratory study, it is not possible to generalize the results. Further quantitative research, such as conjoint analysis, is needed to understand the relevance of each attribute in a choice process. Second, the study involves only participants from southern European countries. Since the consumer's attitudes and behaviors might vary from country to country, it would be appropriate to involve additional participants using a multicultural approach.

Keywords: Fashion, Sustainability, Consumer, Practitioners, Qualitative methods

References available upon request

Figure 1. Overview of the most salient attributes.