BACHELOR FINAL THESIS 2020

THE TRUE COST OF FAST FASHION MODEL

JÚLIA GILIBETS PARÉS

TUTOR: JOAQUÍN TURMO GARUZ
ADMINISTRACIÓ I DIRECCIÓ D' EMPRESES
UNIVERSITAT DE BARCELONA

ABSTRACT

Fast fashions companies have a peculiar business model based on overproduction and selling at lower prices. But these prices are reflecting the reality of the production and distribution of clothing?

This project is intended to analyze this business model called Fast Fashion; raise the awareness of the unsustainability through uncovering the real costs of these type of companies; see the actions that are being taken to change this situation and analyze the behavior of consumer, a key agent in the industry.

Once this analysis has been done, three totally viable solutions are proposed for the transformation of this model towards a more sustainable one, both with society and with the planet.

KEY WORDS

Fast Fashion; Sustainability; Business model; Fashion; Consumers; Innovation; Environment; Social impact; Consumer behavior; Transformation

ABSTRACT (Spanish version)

En este proyecto llamado “The True Cost of Fast Fashion model” (el verdadero coste del modelo Fast Fashion) trata del análisis de este modelo basado en la sobreproducción y la venta al mínimo precio posible. ¿Pero este precio refleja la realidad de la producción y distribución de ropa?

Además del desgranar las características de este modelo de negocio, se pretende darle difusión a la insostenibilidad de las Fast Fashions poniendo sobre la mesa los costes reales de este tipo de compañías; ver las acciones que se están llevando a cabo para cambiar esta situación y analizar el comportamiento del consumidor, un agente clave en la industria.

Una vez realizado este análisis se propone tres soluciones totalmente viables para la transformación del modelo hacia uno más sostenible.

KEY WORD (Spanish version)

Moda desechable; Sostenibilidad; Modelo de negocio; Consumidores; Innovación; Medio ambiente; Impacto social; Comportamiento; Transformación; Moda

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1.INTRODUCTION

Clothes shopping once was considered an occasional event and consumers used to save up to buy clothes at certain times of the year when the seasons changed. But about 30 years ago something changed. Clothes become cheaper, trend cycles speed up and shopping becomes a form of entertainment. Fast fashion entered our daily lifestyle with global chains that now dominate our high streets and online. Suddenly everyone could afford to dress like their favorite celebrities or wear the latest trends fresh from the catwalk.

This scene changed in 2013 when the Rana Plaza clothing manufacturing complex in Bangladesh collapsed killing over 1000 workers. At that moment consumers started questioning Fast Fashion and wondering what the truth of their 10 euros t-shirt was. So, what is Fast fashion really about? How does it impact people and the planet? Is this business model in decline? Will transform?

1.1. What is Fast Fashion?

Fast fashion is a type of business model inside the fashion industry that was developed during the 80s' but it was not implemented till the 90s' when shopping became a form of entertainment. This type of business pertains to an industry which is oversupplied and highly competitive and, further, the model operating within is very disruptive in respect to the traditional one.

"Fast fashion is a term used by fashion retailers to describe inexpensive designs that move quickly from the catwalk to stores to meet new trends. As a result of these trends, the tradition of introducing new fashion lines on a seasonal basis is being challenged. Today it is not uncommon for fast fashion retailers to introduce new products multiple times in a single week to stay on-trend"

Investopedia, 2020

"An approach to the design, creation, and marketing of clothing fashions that emphasize making fashion trends quickly and cheaply available to consumer"

Merriam Webster Webpage, 2020

"Fast fashion can be defined as a cheap, trendy clothing, that samples ideas from catwalk or celebrity culture and turns them into garments in high street stores at breakneck speed"

Good on you, 2018

As described in the research of Donald Sull & Stefano Turconi (2008), in general, fast fashion can be defined as *"the retail strategy of adapting merchandise assortments to current and emerging trends as quickly and effectively as possible"*. Companies with this business model do not need so much time to define their fashion items since they wait for the catwalks of fashion house in order to identify the prevailing trends and then design their collections by reflecting those trends as quickly and at a lower cost possible. So, the average consumer is able to have the opportunity to acquire stylish garments at an affordable price.

The most famous brands working under this business model are Zara, H&M, Mango, Forever 21, Asos, Primark, UNIQLO and Topshop. According to retail conference organizer Retail X Fast Fashion (2019), Fast Fashion had represented the 20% of total revenue share in European fashion markets during 2019.

Because of this business model their products had a short time cycle, for example Zara can reach a whole product cycle in only two weeks. This approach allows fast fashion retailers to launch on the market a new range of items in a very short period, normally between two and six weeks. Consequently, their clothes are always perceived as “innovative” and “highly fashionable”.

Instead, in the past, stylists started planning their collections for forthcoming seasons up to eight months before their market launch, obviously by running a high risk of failure due to the lack of stability in demand.

In addition, according to retail conference organizer Retail X Fast Fashion (2019), Fast Fashion had represented the 20% of total revenue share in European fashion markets during 2019

So, Fast fashion is a business model based on a quick response model through an effective manufacturing process, catching the latest trends from catwalks, streetstyle and celebrities and transforming these trends in products produced at a lowest cost as possible. These products have a short “life cycle” due to the high product rotation in the Fast fashion stores. Consequently, the collection by seasons disappear although fast fashion is still competing with traditional fashion houses that continue to introduce new fashion lines on a seasonal bias.

2. CHRONOLOGY OF FAST FASHION

To understand how the business model of Fast Fashion came to be is important to unravel the background that triggered the factors for the appearance of the fast fashion model. How was the generic external environment that affected the consumer behavior and changed their needs making all conditions favorable for the construction of an independent fashion industry with a new business model called ready-to-wear fashion, a precedent of the Fast Fashion model.

2.1. Slow fashion (1800s)

Before the 1800s' fashion was slow, people used to source their own material such as wool or leather, prepare them and swan and pieced together by human hands on sewing machines.
The Industrial Revolution (1760/1840) changed the cycle of fashion when sewing machines were introduced to the industry. Clothes become more easy, quicker and cheaper to make, the first patented machines in 1846 contributed to an extreme fall in the price of clothing and started to appear economies of scale in clothing manufacturing.

Dressmaking shops started to emerge and were responsible for making clothing for the middle-class, while the population with lower income continued making their clothes. A lot of these dressmaking shops used teams of garment workers to produce their clothes, but some aspects of production were outsourced to people who worked from home called "sweaters" for very low wages. For centuries clothing was made-to-order.

2.2. Standardization and mass manufacture (1900-1950)

During the 1900s till 1950s' the fabric restrictions and more functional styles that were necessary during the second World War led to an increase in standardization of clothes; ready-to-wear military uniforms were mass produced all over the world and garments became generally available. To make possible mass-production was needed a proportionate sizing, flattering cuts and muted tones of contemporary fashion.

Consequently, middle class customers became more receptive to purchase mass produced clothes and the consumer culture really start to change.

Also occurred the first major garment factory disaster when a fire broke out in New York's Triangle Shirtwaist Factory in 1912. It claimed the lives of 146 garment workers, many of whom were young females and immigrants.

Image 1. The New York Herald. Shirtwaist factory


THE NEW YORK HERALD.

NEW YORK, SUNDAY, MARCH 26, 1911.—112 PAGES.

PRICE FIVE CENTS.

HUNDRED AND FIFTY PERISH IN FACTORY FIRE; WOMEN AND GIRLS, TRAPPED IN TEN STORY BUILDING, LOST IN FLAMES OR HURL THEMSELVES TO DEATH

IDENTIFYING BODIES OF THOSE WHO JUMPED TO THE SIDEWALK.

Only One Fire Escape

Source: Google Images

2.3. Trends, self-expression and ready-to-wear fashion (1960-1970)

The decade of 60s' was the era of protest with great social, political, and economic change. After the second World War, especially in Europe, was an era of recovery and rebuilding values under the watchful eyes of young people who in many times started doubting and disagreeing with such values. They protested society and everything that was mainstream, so they started to reject traditions of older generations including the way of dressing. The fashion became a form of self-expression with more variety and options. At this point trends began moving at a dizzying speed to avoid being considered mainstream. So, in 1960 young people adopted cheaply made clothing to follow new trends and reject the statutorily traditions of older generations.

Consumer behavior towards the fashion industry changed; the motivation to buy clothes was not only to solve a simple functional need whether a social, symbolic and hedonic need including the emotional factor in the purchase decision stages and intensifying the motivation to purchase apparel. Fashion started to become an indicator of our social and political climate.

Moreover, during this period there was an accelerated economic growth of American and European countries, even the most affected by the World War achieved a productive and economic increase that transformed the society into a consumer society with new transaction elements such as the credit cards. So, a part of motivation the society had the ability to acquire this type of product.

Also, we can underlie the expansion of the TV and the arrival of multiple channels during the mid-70s' which suppose a huge channel to catch the attention of consumers using the new technique born during the 60s that mix psychology and sociology called marketing. So, consumer behavior was totally favorable for the creation of a fashion industry with the introduction of ready-to-wear clothing focused on the middle and lower class. Both social classes with the motivation, ability, opportunity and correct exposure ideal to become a potential consumer of new fashion.

One of the main factors of the new fashion called ready-to-wear is the trend. Prior to 1960, designers generally created styles for runways, and clothing manufacturers mass produced the designers' styles for consumers acquire the trend. However, during the 1960s fashion designers and manufacturers were frantically trying to keep up with the trends and implement the youths' popular creations into clothing for the masses.

The fashion industry produced clothes for four seasons a year: fall, winter, spring and summer up until the mid-twentieth century, and the designers would work many months in advance to predict what the customers would want. It was in the 1960s and 1970s that this method changed drastically when fashion was based on the street style of youth people that was constantly changing. The seasonality of the fashion was obsolete in the ready-to-wear model.

Soon fashion brands had to find ways to keep up with this increasing demand for affordable trending clothes, leading to a massive textile mill opening across the world, which allowed the U.S and European companies to outsource their labor and reduce their manufacturing cost.

As expected this phenomenon called ready-to-wear fashion increased the media attention of the fashion sector reflected, for example, in the way of presenting the new collections, from the small and intimate salons it was passed to massive calls of great social repercussion.

Because of the widespread of ready-to-wear fashion, the desire for an independent fashion industry and the increase in media attention, a hundred of apparel, footwear retailers and department stores were born in this decade.

Although this revolution in the fashion industry there was still a distinction in terms of magnitude between high fashion and ready to wear fashion. Fast fashion companies that we know nowadays as leaders of the industry including Zara, H&M and Primark started as a smaller shop in Europe during this period. They all were focused on affordable trendy clothing and eventually expanded around Europe with stores that would still not be visible on the high streets where haute couture was located.

2.4. Fast Fashion (1990s - 2000s)

It was not until the late 1990 and 2000s, low cost fashion took off. The 1990s' were a revolutionary decade for digital technology, the introduction of the internet and the World Wide Web changed our sources of information and the cell phone changed our way of communication entering a time of globalization.

Furthermore, was a period of an increasing influence of capitalism and stable economic growth with a rising multiculturalism and alternative media that allowed and facilitated the interconnection between countries.

Globalization pushed small European businesses focused on ready-to-wear clothing to use the organic growth that they were having to expand their brand worldwide reaching the United States market.

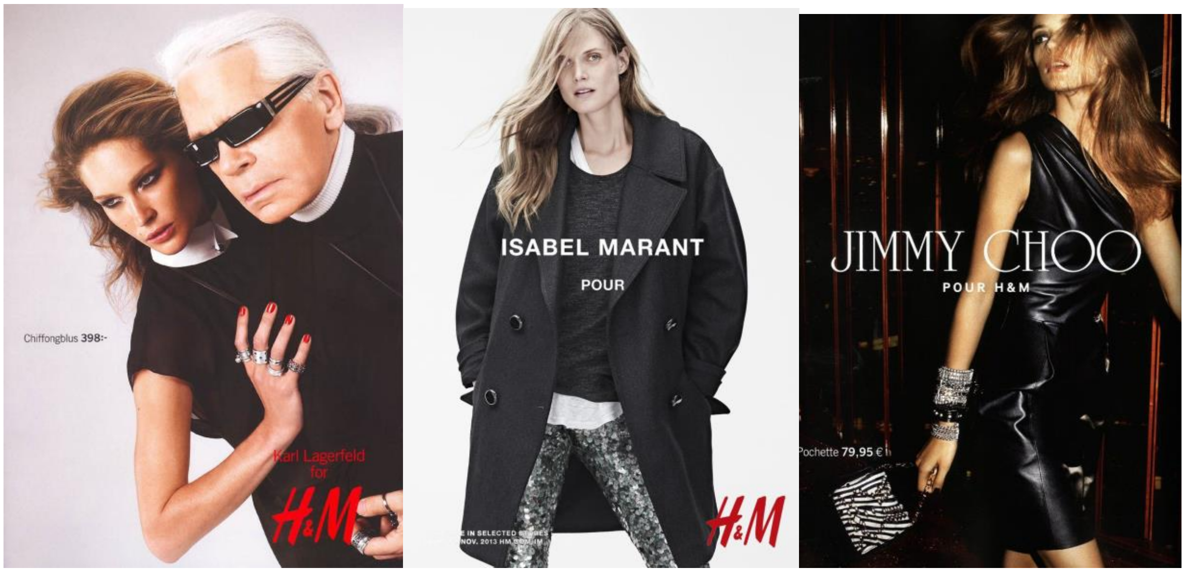
Companies such as Zara, H&M and Primark started to gain prominence in the American market by examining and replicating looks and design elements from runway shows and top fashion houses and quickly reproducing and selling them at the lowest cost possible. The concept of Fast Fashion had just been born.

It was only in the early 2000s that low cost fashion took over high street fashions sharing location with haute couture stores and Zara, H&M and Forever 21 became the retail giant of the market. According to the "Sunday Style Times" Fast Fashion concept "It particularly came to the fore during the vogue for 'Boho chic' in the mid-2000s."

Moreover, during the 2000s the rise of online retail and in store fast fashion caused a decrease in department stores sales. Designers noticed their designs were being knocked-off and decided to do something about it. In 2004, the Swedish retail giant H&M, one of the biggest fast fashion retailers, collaborated with fashion designer Karl Lagerfeld to introduce a limited capsule collection which proved to be a huge success. From the point of view of sales, it represented a very important economic injection for the company, as well as an increase in the value of its brand.

As the decade went on, it became increasingly popular to mix designer and fast fashion clothing and collaborations became a viable marketing strategy for both, making designers more accessible to the common consumer and building brand value and increasing sales for fast fashion companies. Fast Fashion was heralded by some as the "democratization of fashion".

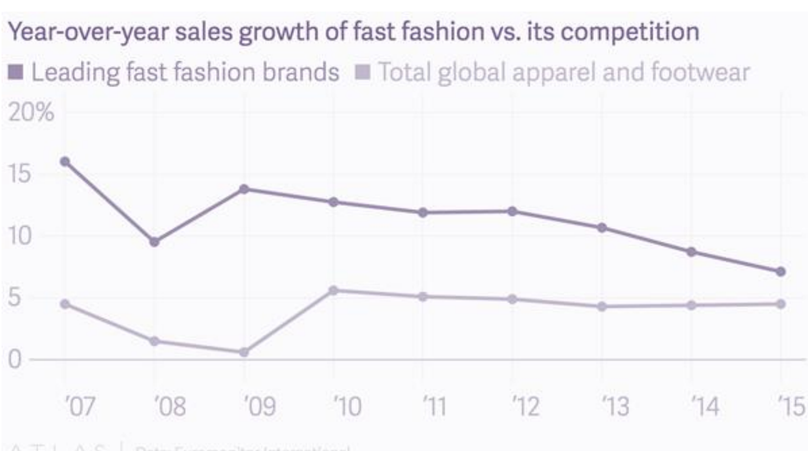
Image 2. H&M Designers collaborations



Source: Google image

The global financial crisis of 2007-2008, affected the textile sector due to the collapse of consumption and the deflation of industrial prices in the sector. The sales Fashion growth rate fell 5% but however, the Fast Fashion sector didn't take long to recover a positive sales growth rate meanwhile the overall apparel market continued in decline. (Euromonitor international, 2017)

Figure 1. Global apparel sales growth rate vs Fast fashion sales growth rate

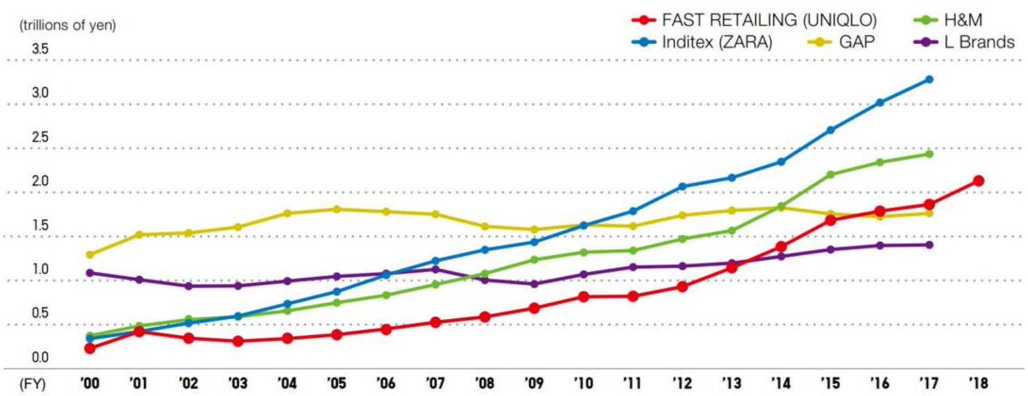


Source: Euromonitor International

This quick recovery is because some companies in the sector showed an increase in sales.
As we can observe in the Figure 1 the three most important companies after the crisis in the Fast fashion sector, Zara, H&M and Uniqlo, experienced a slight increase in their sales during this period. One of the causes of this phenomenon is the decline in the disposal income of families that caused an enlargement of their consumer base due to the affordable price range of their products.

Furthermore, the already internationalization of these companies also helped to further the increase of the sales growth rate as there were countries where the crisis had minor impact, especially China.

Figure 2. Sales at leading apparel retail (2000 - 2018)



Source: www.fashionretail.blog

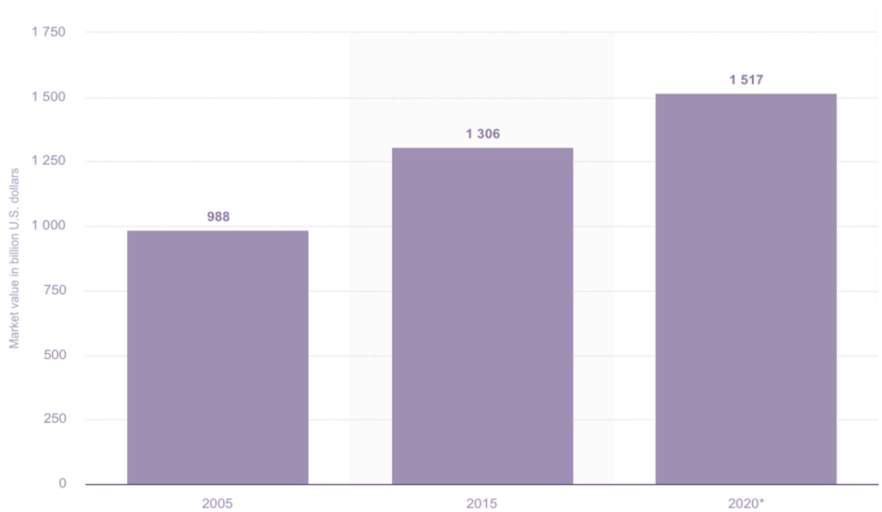
2.5. Actuality of Fast Fashion

During the last decade, aided by globalization, internet penetration, disposal income and supply chains, digital-first retailers appeared in order to produce trend-driven garments and accessories designed for digitally native millennials and Generation Z customers. Some of these retailers are Asos, Boohoo, Revolve and Misguided.

These online shopping sites offer through their platform or website different brands as its own range of clothing's and accessories at an affordable price. One of its features is the rapid expansion to international markets that these companies have since costs are lower than an offline store internalization. Further, most of these companies adapt their website and activities to local markets acquiring faster growth than domestic retailers in some countries.

According to the retail conference organizer Retail X's Fast Fashion 2019 reports, Fast Fashion represented the 20% of total revenue share in key European fashion markets in 2019.

Figure 3. Value of apparel market worldwide from 2005 to 2020 (in billion U.S. dollars)



Source: Statista 2020

Despite the growth of the sector, the traditional fast fashion model is not guaranteed to succeed due to some e-commerce players that have performed better than others in 2019. The Online fast fashion that succeeded in 2019 invested in logistics and worked to improve supply chains, aiding fasters design-to-delivery process. One of the strengths where online retailers take advantage over traditional fast fashion models is the ability to track data to spot and forecast trends while keeping inventory levels in check.

"Inventory is a killer for fast fashion brands" declares Martin Shawn, head of research at Retail X. Companies that minimize inventory problems by using data to forecast trends are the best positioned to succeed. Not only will they be able to produce trends faster, but they will be reducing their wasted inventory and considering that wasted inventory negatively affects a brand's bottom line and its image, as consumers grow increasingly aware of the environmental concerns of extra stock. It is one of the most important advantages respect the offline fast fashion retailers.

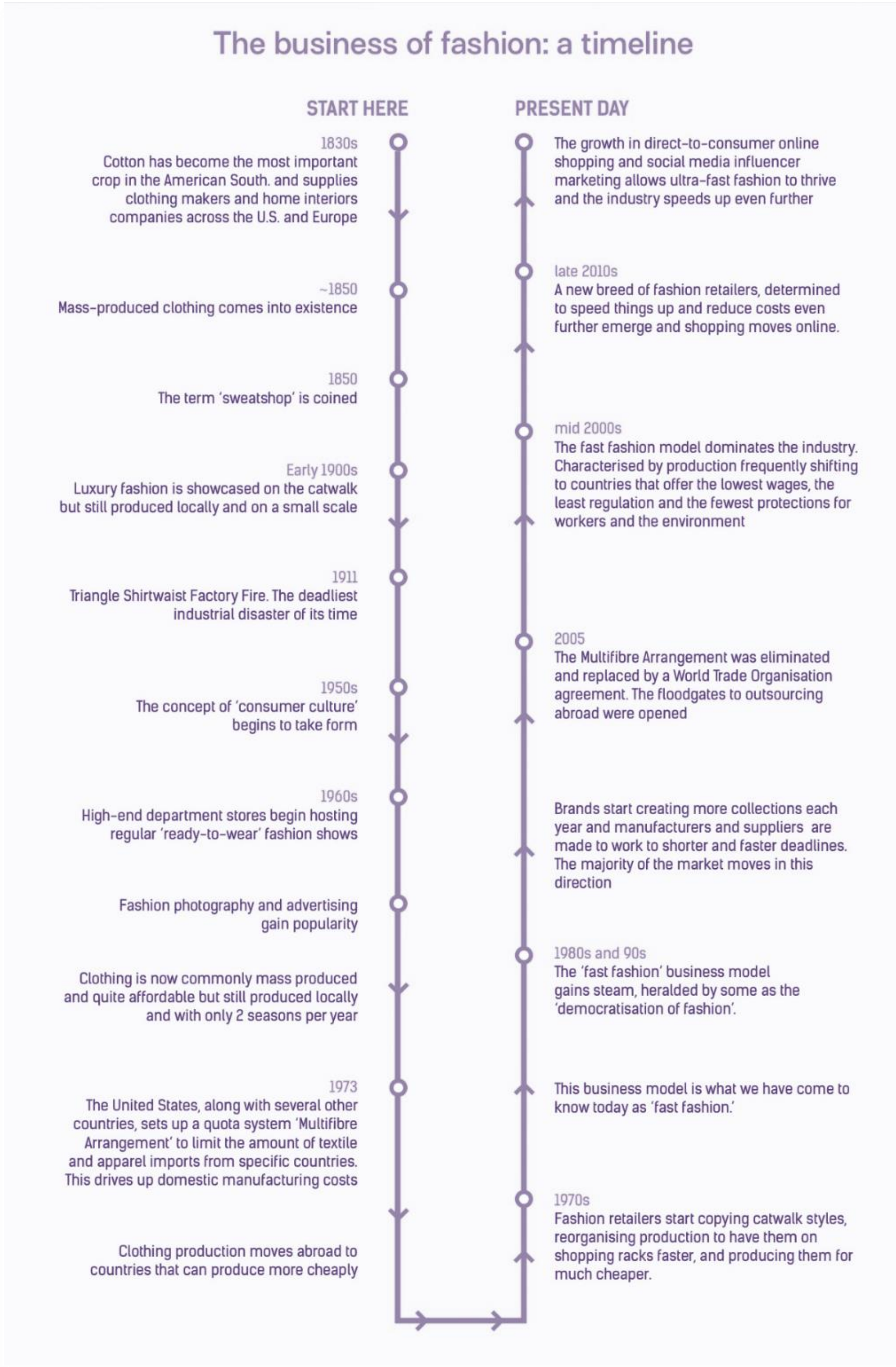
Social Media has spread and democratized celebrity, with "influencers" playing a key role for fast fashion brands. Also collecting data is used to measure influencer impact and social engagement in order to choose the one that is more coherent with the target and the product.

Despite the increasing digitization of purchases, stores have become the place where the customer gets an experience. The customer experience has become the most important tool to build brand identity and form advocate consumers exceeding their expectations of the experience; a very important fact considering the high competition in the fashion sector and the wide range of consumers. As Benjamin Franklin said, “Tell me and I forget, teach me and I may remember, involve me and I learn”, so physical stores are a way to involve the customer in the brand identity and increase both online and offline sales. It is also a tool to add value to the product since a consumer will pay more for a better customer experience.

For example, H&M include things such as selected external brands, the café concept It’s Pleat, a florist shop in shop, self-service checkouts, monogramming services and repairing services. Even so fast fashion companies are still quite far from the innovation that other clothing brands are having to improve the consumer experience.

So, over the past few years, a new breed of fashion retailers has been determinate to speed things up and reduce costs even further, no matter the human or environmental cost. The growth in direct to consumer online shopping and social media influencer marketing, these ultra-fast fashion players are forgoing bricks-and-mortar locations to gest products online within days, increasing the frequency of consumer purchase.

Figure 4. The business of Fashion: a timeline

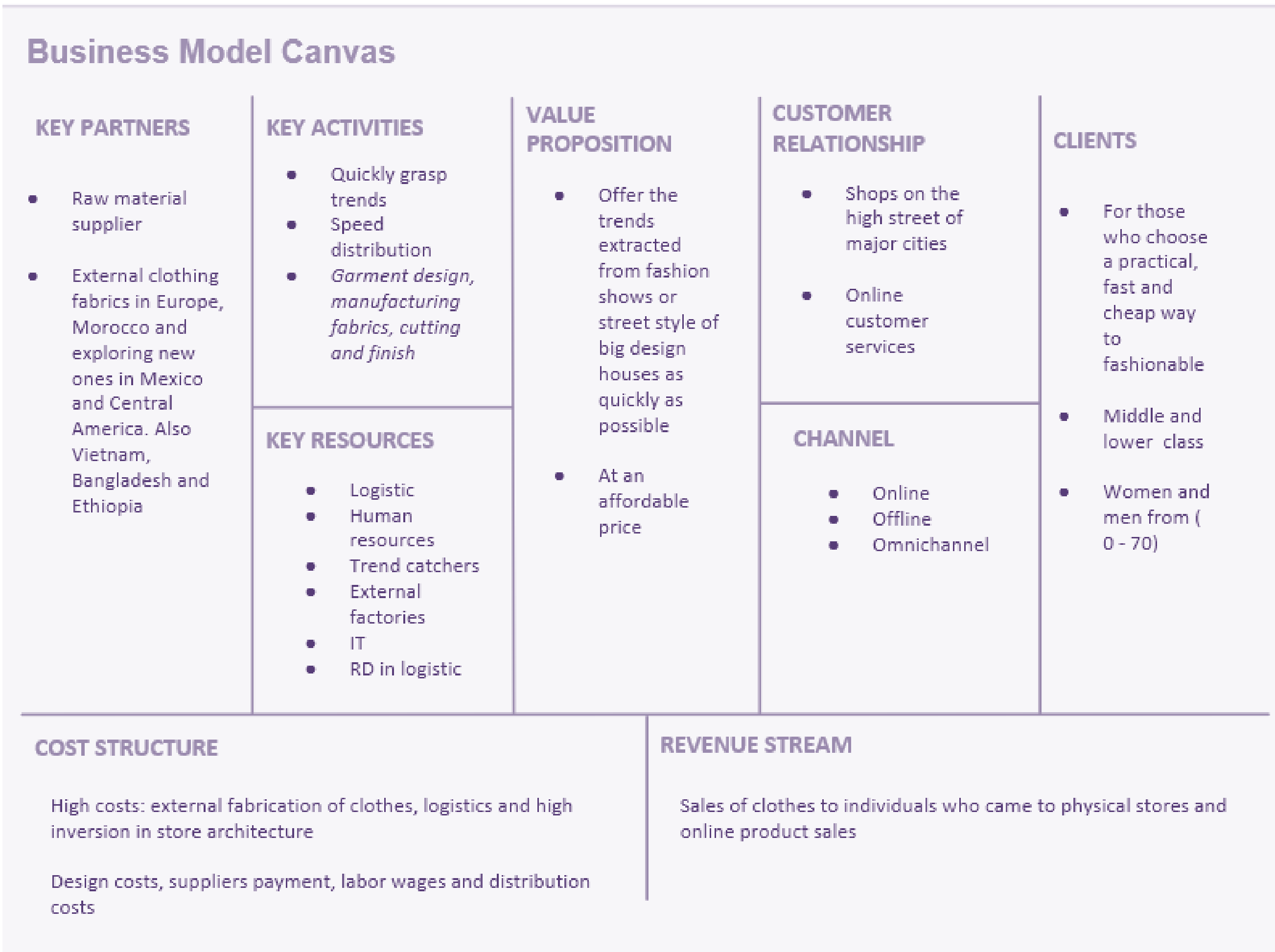


Source: Why we still need a Fashion Revolution, 2020

3. BUSINESS MODEL

To understand the complete operation of this type of business we proceed to carry out a generic business plan by benchmarking the two most important companies in the sector: Inditex Group, and H&M.

Figure 5. Generic Business model of Fast Fashion



Source: Own elaboration

3.1. Key partners

Products can either be flexible or inflexible depending on the production techniques and amount of time that it takes for the item to be produced. Flexibility provides competitive advantage to manufacturers.

Flexibility is so crucial in the fast fashion sector of the garment industry to swift restock; retailers must have the flexibility to quick response to changing customer preferences and have them in the store before the preferences change or before a competing retailer has them in the store. As a result, many fast fashion retailers use a contracting and subcontracting system to maximize its flexibility and shift production at any time. Also, they can overcome legal risks regarding production, and they are not responsible for the workers' conditions.

Moreover, the Fast Fashion and the geographical separation of production from consumption, is a direct result of the change of international trade agreement. Before 2005 individual markets were protected from competing cheap imports, but in January 2005, the Multi-Fiber Arrangement (MFA) and General Agreement on Trade and Tariffs came to an end leading to enter to the market cheaper goods and creating a high competition.

Companies are in search of the so-called "free zones", because of convenient conditions like the free use of buildings and lands, no taxes, no limitation for the respect of the environment, low costs of labor force and police service guarantee.

According to the International Labor Organization (2018), there are 850 free zones in the world, which are involving 27 million of workers. These zones are concentrated most in Asia and in Center and South America

Although the outsourcing model focuses on the offshoring system (outsourcing business processes from one country to another, usually in search of lower costs or labor) is the one that still predominates, the fashion industry is deploying a trend to nearshoring to ensure its innovative capacity and reduce time to market.

This is a result from a parallel increase in Chinese labor costs and an increasing manufacturing for its market (75% of clothing manufactured in China was exported ten years ago, nowadays 75% of its manufacturing is for its own market). So, the available manufacturing capacity in Chinese firms for U.S and European firms is shrinking. Firms are now utilizing Vietnam, Bangladesh and Ethiopia but, none of these countries have the capacity to absorb the manufacturing capacity of China.

A study by McKinney (2018) shows that 72% of fashion firms plan to move some of their sourcing outside of China and that 70% would be to manufacture closer to their market in "proximity sourcing".

Moreover, offshoring has been perceived as a challenge for the innovation capacity of firms in fashion, where design production innovation is closely linked to the manufacturing process. Therefore, the co-location of these two activities are favorable to an innovation which for some means to backshore manufacturing in the origin country. For example, Adidas and Burberry have opened modern factories respectively in Germany and the United Kingdom.

On the other hand, some firms choose a "reverse colocation" in which firms move design next to manufacturing rather than the alternative; some European fashion businesses have moved their design department to Hong Kong or China.

Finally, the cultural, political, and economic dimension of distance matter much to the quality of coordination and innovation. Some French firms have decided to manufacture in Morocco, which is not necessarily the closest from geographical perspective but close from close a cultural and political perspective. In addition, the production schedule may be sped up using near-shore suppliers, located close to the main target market to reduce time to market. For U.S. companies, near-shore suppliers may be in Mexico and various countries of Central America; and for European companies, factories may be in Portugal, Morocco, Romania, Bulgaria or Turkey.

In conclusion, the fashion industry shows a positive trend where manufacturing bases are relocating from "off-shore" to "near-shore" countries to reduce time to market and improve the innovation capacity.

3.2. Key activities

One of the most important activities is the quick grasp of trends. Nowadays Fast Fashion brands produce about 52 "micro seasons" a year which is a new collection every week. Most of the companies that fall under the Fast Fashion category are currently replicating streetwear and fashion week trends as they appear in real time.

Mostly trends are extracted from the fashion shows carried out by the most relevant brands in the industry sector. Fast Fashion retailers can produce and sell garments that look the same as designs by luxury labels because in most countries there is no provision of having a copyright protection for fashion design. Additionally, copyright law does not provide exclusive rights for inherently useful items, and garment and accessories are typically considered "useful items". If the garment in question does not contain any distinguished logo, brand names or original prints copying the design and fabric is totally allowed.

Another way to track the new trends around the world is observing the street style. The worth Global Style Network (WGSN) is a trend forecast company. This trend forecasting service includes what is new and next in apparel, beauty, color, marketing, retail and wearables. As is an online service they can track daily trends, with a simple click you are able to have daily updates of what teenagers in Hong Kong are wearing today for example.

Image 3. Zara vs Haute Couture

Source: Google Image

Moreover, blogs and influencers are assuming a strong role in tendency due to social media has dispersed and democratized celebrity, with “influencers” playing a key role for Fast Fashion brands in terms of inspiring the brand designers or communicating and doing promotion of the brand.

Another tool that Fast Fashion businesses use to quickly catch trends is the “Trend book” of Nelly Rodri. During 1991 the “International Fashion Committee” which were trend trackers was privatized and purchased by Nelly Rodri who is trying to monitor trends with his team of trend trackers through consumer intelligence, creative intelligence, marketing intelligence and technology intelligence. From this research a book is born from which only a few copies are sold at a price of 2.000 euros each.

3.3. Key resources: Logistics

Fast Fashions logistics and distribution are a key point to achieve the proposition of the business and the brand promise. This type of business is characterized by logistics with control over customer experience and product allocation. The strategy is to speed up shipping and delivery time to better respond to trends as the market of fast fashion gets more competitive with the entering of e-commerce retailers. This objective can be completed with a flexible production, well-coordinated logistics, smart data usage and fast organization.

For this reason, is needed agile supply chains by sourcing production close to its headquarters to make its lead time speedier and a rapidly update their bricks and mortar retail models to digital age.

Fast Fashion manufacturing process are getting closer to the Just in Time methodology which is an inventory and production strategy with the aim to reduce as much as possible times within production system as well as response time with suppliers and customers. This method involves creating, storing and keeping track of only enough orders to supply the actual demand for the company's production. So, items are selected to be shipped to stores according to predictive models and data analysis systems converting the investment in latest technology in a key resource for these types of firms.

In the one hand if the demand forecast is adjusted to the reality the Just in Time method of accounting for inventory is advantageous to companies because of the reduction of waste it offers and the inventory costs.

On the other hand, unexpectancies in market demand, especially about overcoming the demand can cause huge problems as in Fast Fashion inventory is not allowed and unsustainable practices can arise in these companies.

One of the main particularities of Fast fashion logistics is the cycle of products. These companies do not replenish products but instead replaces sold-outs products with new clothes. That way shoppers know that they must purchase an item when they see it because they might not have the opportunity again, resulting in fewer markdowns and stronger margins.

3.4. Cost and revenue structure

Fast Fashion is characterized by the affordable prices of their products and to be a reality it is necessary to produce and distribute at a minimum cost as possible.
The main source of income is selling both online and offline due to the perfect integration between these two channels. Pricing is one of the most challenging areas for fashion retailers

due to high SKU (Stock Keeping Units, which is an identification code of a product rang in order to identified for stock purpose and also for the visual plan of merchandise) complexity, the limited item comparability and the frequent flow of new collections. Although technical prices solution most merchandises prefer to relay on an intuitive sense of what the consumer would be willing to pay, competitive benchmarking, and margin contribution. (Mckinsey, 2014).

Analyzing the profit and loss report of 2019 of Inditex and H&M we can observe that the principal revenue source is the net selling in own stores and online. The cost structure is basically formed by cost of goods sold, essentially including the amounts corresponding to the purchase or manufacture from third parties of products destined for sale or transformation and the selling costs including all the distribution process.

Moreover, the net sales in these two Fast Fashion companies used to be two times the cost of goods sold leading to a margin around 50% so we can arrive at the conclusion that in this type of business the setting price is 2x the cost of manufacturing the product.

Figure 6. Inditex annual report 2019

(Cifras en millones de euros)	(Notas)	2019
Ventas	(3)	28.286
Coste de la mercancía	(4)	(12.479)
MARGEN BRUTO		15.806
		55,9%

Source: www.inditex.com

Figure 7. H&M annual report 2019

SEK M 1 DECEMBER – 30 NOVEMBER	2019
Net sales, note 3, 4	232,755
Cost of goods sold, note 6, 7, 9	-110,302
GROSS PROFIT	122,453
Selling expenses, note 6, 7, 9	-96,279
Administrative expenses, note 6, 7, 9, 10	-8,828
OPERATING PROFIT	17,346

Source: ww.H&Mgroup.com

We should underline that none Fast Fashion company are representing in money (costs) the social and environmental consequences represented by the production and distribution of their products.

3.5. Customer relationship, channel and clients

Fast Fashion companies are focused on mass production and for this it is necessary to have a wide range of consumers who choose a practical, fast, cheap and fashionable way to consume fashion. The clear majority of Fast Fashions, apart from its main business line, which would be fashion collections focused on men and women from 16 years up to 70 years old, they have lines for children from 0 up to 14 years old, and in many cases, taking advantage of synergies, they are diversifying the business offering decoration and fashion for home.

Due to their affordable prices, Fast Fashions companies are focused on the middle and lower classes, but it is becoming a trend to mix Fast Fashion products with Haute Couture and therefore begins to have presence in upper classes.

These consumers have two channels to obtain the products offered: online and physical store. These two channels are perfectly integrated with the intention of improving the consumer experience, and although they follow an omnichannel strategy, Fast Fashions offers exclusive online products.

In addition, if we observe the annual reporting of 2019 of these companies, the clear majority have increased online sales between 15% and 23% (H&M and Inditex reporting) and this percentage is expected to follow and increasing positive trend.

Despite, they have continued opening physical stores where the main objective is no longer to sell as much as possible, but to create a consumer experience to be able to exceed their expectations. This means increasing investment in technology and taking it to stores so that the consumer can have an interactive experience.

Following the omnichannel strategy consumers can establish a relationship with the brand physically in their respective stores through traditional customer service or online either on the official website or the brand's social networks such as Instagram or Facebook.

4. THE BIG PROBLEM OF FAST FASHION: THE SUSTAINABILITY

Over the past two years the climate change concern has increased, and more and more voices have emerged to denounce the urgency of doing something in this issue. It seems that people are more aware that our planet is a closed system, offering limited resources.

Fashion is the second most polluting industry, producing a 10% of global carbon emissions and the shift to Fast Fashion has exacerbated the issue. A clear example is that it takes 2.700 liters of water to make one t-shirt, enough for one person to drink for 900 day. So, what is the real cost of the Fast Fashion system?

It is important to start explaining the three common elements which form the definition of sustainability as there is not a homogeneous one:

1. The attention to our planet and its natural resources.
2. The responsibility toward people operating at every stage of the Fashion pipeline.
3. The increase in profits due to stakeholder engagement approach.

In most fashion business investors have understood that ecological and social responsibility can provide better returns, thus generating a further push toward sustainability implementation.

Despite that, several fashion brands, sensing the changed requests for transparency of both consumers and investors, decide to follow the eco-fashion trend as a mere business scheme, through a compliance approach. Following sustainable practice with mere compliance is not enough. It is needed to drive innovation; a company must embrace and apply sustainability ideals top down. So sometimes when firms say that they are acting green doesn't mean that they are being sustainable.

Moreover, digital is affecting sustainability. The newer generations are facing the sustainability issue through digital media, actively researching on socials and blogs for information on the provenance of apparel or, when the latter is missing, directly asking brands about their footprints of their products. The wide-range availability of information or lack on this has proven to be the worst enemy to fashion brands, desperately trying to avoid any reputation risk.

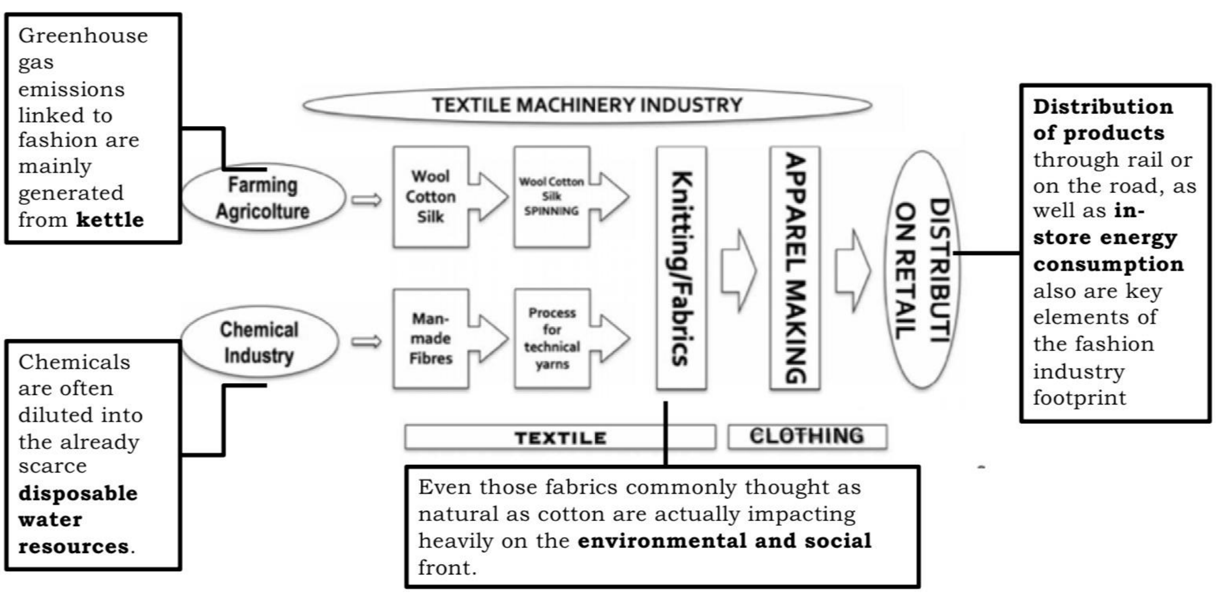
In 2017 the Fast Fashion company H&M was accused of burning 12 tons of new, unsold clothing per year despite its ongoing sustainability efforts. According to a research from Danish tv program (Operations X) H&M incinerated approximately 60 tons of usable, unsold clothing over 2013, 2014, 2015, 2016. H&M stepped forward and called the claim false, the company replied that the clothes had been sent to incinerate because of mold or not complying with their strict chemical restrictions. The company immediately launched an initiative called "Conscious experience" which consists of recycling clothes that are no longer used and taking them to their stores in exchange for a discount coupon.

Fast Fashion companies have more difficulties to become green because "sustainable fast-fashion" is an oxymoron as the idea is based in speed and continuous change whereas "Sustainable" is often associated with slow and conscious choice at each stage of production. Further clothes sold at a cheap price cannot consider nor properly reward the human cost linked to its production.

4.1. Where are unsustainable practices in Fashion?

If we take a look the fashion pipeline we can detect that unsustainable practice have presence in all fashion steps, from the production of fabrics till the product is delivered to consumer. Furthermore, after consumer usage, unsustainable practice continued to be formed during the washing process and the "death" of the product.

Figure 8. Unsustainable practices in Fashion pipeline



Source: Carlo Fei 2019

4.1.1. People

Human rights and working conditions

Despite the international standards, laws, legislations and certification systems that exist to protect human rights and ensure a correct working condition, exploitation is still rising within the fashion industry. Fashion companies still abusing human rights forcing and using child labor, having excessively long working hours, repressing of trade union organisms, paying extremely lower wages, unsafe and dangerous working conditions, gender and racism discriminations, and normally no access to justice for those whose basic labor rights are violated at work. These problems have presence in places like Bangladesh, Cambodia and Mexico but also in the United States and Europe.

Fire safety of garment workers

Since the Rana Plaza factory accident, the safety condition has been improved, but factory accidents still happen. In December of 2019 a fire surprised a bag factory in Delhi killing 43 workers who were sleeping inside the building; it was not known why these workers were sleeping in their working place. A week later an explosion in a sweater factory in Bangladesh killed one woman and injured five others (Ecotextile News, 2019). In February 2020 a fire in a denim factory in Ahmedabad, India, killed seven workers, in this factory the only way to escape was by climbing up a steep ladder to just one exit door. Few weeks after another fire killed three people working in a garment label factory in the same city.

A study of Microfinance opportunities and Fashion Revolution in 2017 found that 40% of surveyed Bangladesh workers had seen at least one fire in their workplace.
Moreover, in Cambodia last year there were more than 1.500 traffic accidents involving garment workers getting to and from their factories, including 50 deaths and 341 serious injuries (The Phnom Penh Post, 2020)

Forced and child labor

Forced and child labor are forms of modern slavery and are prevalent in the fashion supply chain. Antislavery International of 2020 explains how each year the government of Uzbekistan and Turkmenistan forced hundreds of thousand people out of their regular jobs to go to the fields to pick cotton to export. Furthermore, China allege that cotton products made in Xinjiang may have been grown or picked by Uighurs, a Muslim minority group, currently being held against their will and vast detention camps (Wall Street Journal 2019).

Low wages

Fast fashion is characterized to reach the lowest cost of production in order to sell pieces of clothes at an affordable price, this is translated to the wages of workers, which in many cases is usually the minimum wage imposed by law. In most garment producing countries, the legal minimum wage is not enough for a worker to live on. In Bangladesh, for example, the legal minimum wage is 16 euros per month, while the actual living wage for a single person is 72 euros per month and 142 euros if someone has a family support. In most countries where our clothes are made such as China, Sri Lanka and Ethiopia the gap between the legal minimum wage and living wage is unfair.

Companies should be paying higher prices to their suppliers, and governments should be setting a rational legal minimum wage in order to cover living standards. Consumers should pay more for clothes too. The actual fashion industry and their cheap prices are not reflecting the real costs involved in making clothes. As Kalpona Akter, executive director of Bangladesh Center for Worker Solidarity, explains in the New York Times 2020, *"Cheap clothes are not cheap. Someone always has to pay for them. And that someone is the worker".*

Gender discrimination and violence

Millions of garment workers are young women and often in very low paid jobs. Men tend to work as a supervisor, management and ownership positions in factories. This imbalance between the power of women and men in some cases and countries may be translate that women are particularly vulnerable to abuse in the workplace Sexual harassment (including unwanted touching, verbal insults, rape and abuse of pregnant workers) and gender violence are common in the industry supply chain.

Unfortunately, one in every two women workers in garments factories in Southeast Asia has experienced sexual harassment, according to reports from CARE international 2019.

In June of 2019 the ILO (International Labour Organization) adopted a new international law of violence harassment in the world of work, Convention N. 190. This law helps provide clarity and legal protection for women and the most vulnerable against violence and sexual harassment in work. However, it is only applied to countries that have ratified the Convention and to date only few countries have done.

4.1.2 Social and societal impacts

Loss of culture, craft and skills

Today it is a reality that the number of artisans and heritage craft industries around the world has been significantly reduced due in large part to the mass production and because second-hand clothes have come afloat at the local market. We are arriving to the point where we are risking losing ancient and unique techniques that have been passed out through generations if we don't support them.

Millions of people depend on handcraft trade, especially people in rural communities. According to the Artisan Alliance at the Aspen Institute (2012) the artisan sector is estimated to be the second-largest employer in developing worlds after agriculture. It is worth over $32 billion every year.

Although some research suggests that the demand for handicraft production is growing, the future of this sector is uncertain. In 1950, Italy had more than four million tailors and nowadays are less than 700.000.

Mental health, body image and lack of diversity

Fashion has influenced body image and played a huge role in reinforcing gender norms throughout history. For over a year, clothing has been advertising mostly using thin white models with lack of diversity on catwalks and fashion magazines, also in boardrooms and offices of fashion businesses with sometimes overtly racist product design and marketing, and very few people of color's voices and ideas being recognized and valued.

Nowadays, with the constant flow of content shared on social media, the pressure to dress and look a certain way is overwhelming and, in some cases, advertisers draw upon our insecurities to sell us products that we don't need in order to raise the overconsumption. These issues can be linked to body dysmorphia, eating disorders and depression.

Also, there is a lack of different body shapes, sizes, ages and genders identities represented by the industry, although this has started to change recently.

Finally, due to the short duration of fashion collections and the speed they are produced, they are affecting the mental health of designers and artists with the constant pressure to be constantly creating.

4.1.3 Environmental impact

The climate crisis

It is difficult to know exactly the impact of the fashion industry in the environment due to the data that exists is not very comprehensive, reliable and sometimes contradictory since there is not a unify way to measure the impact. However, if we analyses the ways in which our clothes are produced, consumed, used and thrown away we can understand that our clothing comes at a huge cost to our planet.

Fossil fuels are required to light buildings and run textile machinery, to make polyester (which is derived from petroleum), to transport clothes and fly industry professionals around the world, and to provide energy that runs our washing machines and tumble dryers. All of these activities produce significant greenhouse gas emissions. (Why We still need a fashion revolution, 2020).

The fashion industry is responsible for a 10% of global carbon emissions and if that figure continues to grow at current rates the fashion could be more than a quarter of the world's annual carbon emissions by 2050.

In the UK, clothing has the fourth largest environmental impact after housing, transport and food. The carbon emission of clothes in the UK rose to 26,2 million tons in 2016, up from 24 million tons in 2012 and throughout the European Union estimates are much higher at 195 million tons of carbon emissions annually produced by clothing. To put in context, a car emits about 4,6 tons of carbon dioxide each year, so the carbon footprint of our clothes in the European Union compared to driving approximately 42.391.304 cars each year.

Despite all, some brands and suppliers are already taking decisions to reduce their carbon footprint the world still track 2◦C and is needed to do it faster to reverse the global emissions which means that our governments should invest into producing comprehensive, credible data on fashion's environmental impacts.

Waste and recycle

We are a society who use to buy more clothes, wear them less and dispose of them more quickly than ever. Less than 1% of textiles clothes are recycled into new textiles and clothes (Ellen McArthur Foundation, 2017) and most clothes we discard end up in landfill or incineration.

Fashion waste is generally classified in two types:

- Pre- consumer: scraps and leftover materials from producing clothes, disused samples and production that are damage or don't sell
- Post-consumer: what is discarded by consumer after use

According to Global Fashion Agenda 2018 one quarter of industry resources are wasted as leftovers of garment production every year, the major resources wasted are unfinished fabrics, cut pieces, end of roll fabric, defective fabric pieces and overproduced and rejected garments. Normally, damaged clothes and discarded rolls of recognizable fabrics of a brand are incinerated in order to protect intellectual property and reduce unwanted stock to avoid being sold at knockdown prices.

Environmental protection agency shows that textile waste increased 811% between 1960 and 2015, and most of this waste ended up in the dump. The other part, which is estimated at 10% of the disused textiles, is collected globally to be reused and exported to developed markets. It has been reported that the flux of second-hand clothes to developing countries is damaging local textile production and business. Moreover, most of these clothes are unsellable and an investigation of the company Ricketts (2020) shows that 40% of imported clothing ends up rotting in landfills or in the sea and most of this are made from synthetic material which is not biodegrade.

Nowadays, some national governments are approving laws in order to force the companies to take responsibility for the waste created by the products they sell, and also, several brands and retailers are collecting unwanted clothing's from the customer.

Finally, we should underline that the textile used in clothing will be able to be used repeatedly and for much longer, which will cause a reduction of the need to create clothes from virgin fabrics and we will be able to create a circular system. Even in a circular system, we will need chemicals to dye and process textiles, energy to operate machinery and fuel for transport. So, in the current era of mass clothing overproduction circularity will not eliminate fashion environmental waste impact.

Water, pollution, toxic chemicals and plastics

The textile industry is the main culprit of water pollution globally. A huge amount of water is used in agriculture to grow cotton, to dye and process fabrics, and to wash our clothes. Fiber and textile production use the world's most important water basins located in China, Vietnam and Pakistan; these water basins are critical to water security in the regions as they provide drinking water to millions of people and wildlife.

According to some research, 20% of all freshwater pollution comes from textile treatments and dyeing (Maxwell, McAndrew and Ryan, 2015). This factor is produced when suppliers didn't remove hazardous contaminants found in textile dyes and finishing chemicals releasing the water back into the environment. These toxic chemicals can cause serious health problems, so many big brands are working to remove hazardous chemicals from their supply chain.

Furthermore, when we wash our clothes made of synthetical materials, especially polyester, small particles of plastic are being deposited in our water systems ending up in our seas, rivers and lakes. With a normal wash up to 700.000 microfibers can be shed from our clothes.

Biodiversity and soil health

Fashion production process has a significant and damaging impact on biodiversity, the variety of plants, animals, habitants and life on the earth.

One of the principal problems are forests that have been felled in order to make cotton farming and to create wood-based fabrics. In fact, the fashion industry is projected to use 35% more land for fiber and textile production by 2030 which will suppose an extra 115 million hectares that could be left to preserve biodiversity (Global Fashion Agenda, 2017), and forests are not only a key factor for biodiversity, they also act as a carbon sink that otherwise would be in our atmosphere.

The intensive industrial agriculture processes that are used to produce raw materials and textile contribute to soil erosion through the used pesticides which are used in cotton cultivations. These pesticides are affecting crucial insects responsible for pollinating crops and supporting ecosystems and food security around the world.

Animal welfare

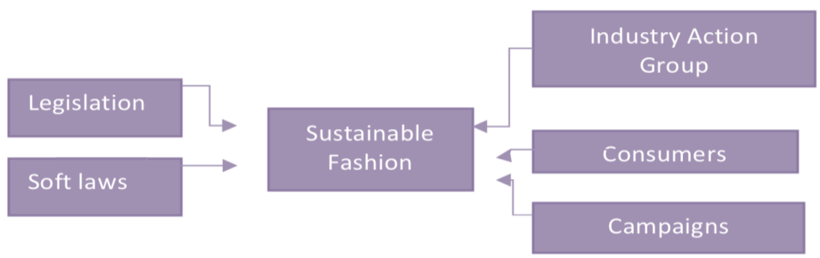
Leather, fur, silk, cashmere, exotic skins, shearling are some of the animal-based materials used in fashion. The majority leathers come from China, India and Bangladesh where animal legislation is very weak and normally the conditions of animals in the farms are not the most appropriate. Furthermore, the lack of traceability and transparency create a huge problem to know where animal materials are coming from and under what conditions they have been produced.

5. WHAT IS HAPPENING NOWADAYS? (The Green Fashion Revolution)

Mostly the adopted solution is the called green fashion, a marketing technique emphasizing minor crowd-pleasing investments in green initiative, without any effective environmental protection goal. A lack of specific guidelines has prevented the move beyond greenwashing and to build an efficient strategy acting concerns of both consumers and investors.

Conversely, during the last years it has begun to be visible the green fashion revolution through legislation, soft laws, industry action groups, campaigns and consumers.

Figure 9. Drivers of green fashion revolution



Source: Own elaboration

5.1. Legislation

A legislation is a statutory law which purpose is to regulate, to authorize, to sanction or to restrict something. In legal terms there are not many laws related to the sustainability of the fashion industry.

Even though, there are decrees of global obligation such as The Modern Slavery Act of 2015 of global validity and the REACH regulation about Chemicals approved by European Union.

From the local point of view, it is even harder to find fashion sustainability regulations, one of the few countries with a decree law is Italy, one of the fashion capitals. This law is less than satisfactory since it is very generic, and it does not have a clarifying methodology of companies' reports.

Legislation MSA 2015

The Modern Slavery Act 2015 (MSA) has been the first global act against slavery and forced labor in the 21 centuries, which enacts provisions of corporations regarding the necessity of transparency in supply chain. The act requires that any commercial organization in any sector with a global turnover of at least 36 million pounds, operating in the UK, disclose the steps they are taking to address modern slavery in their business and supply chain, in an annual Slavery and Human Trafficking Statement.

However, the main issue is the lack of any information in the Act about control on the effective application of the norm: currently no mechanism to check which companies are required to report exists.

The mandatory disclosure requirement will enable the public, employees, consumers, investors and any other stakeholders to make informed decisions about the companies they are interested in.

Legislation REACH regulation EU

The Registration, Evaluation, Authorization and Restriction of Chemicals is a European Union regulation regarding the production and use of chemical substances during the production process. The aim of REACH is to improve the protection of human health and the environment by identification of the properties of chemical substances. At the same time enhance the innovative capability and competitiveness of the EU chemicals industry.

Due to the strong interception between the chemical industry and the fashion industry, this regulation has become crucial to major fashion brands, which are required to impose restrictions on chemicals used also to all their manufacturers and suppliers, a task that can be particularly difficult when production is outsourced all over the world. To internalize the risks linked to use of chemicals while at the same time following the REACH regulation, fashion brands are developing their own Restricted Substances List (RSL), to be applied internally and to any other manufacturer or supplier.

Italian legislative decree 254/2016 IT

The Italian legislative decree requires the companies inside some specific criteria disclose non-financial information in their annual statement, regarding environmental, social, employees, relation and human rights. This decree only involves big corporations that are operating with an average of 500 employees and listed corporations, banks or insurance companies.

However, the legislative decree does not solve one of the greatest issues in sustainability, there is not a common methodology of reporting to be applied by every company in the disclosure of information.

5.2. Soft laws

Soft laws differ from legislation for not being compulsory. A soft law is a set of rules or regulations in the form of recommendations, behavior codes, principles...

The United Nations is the reference point for raising awareness on the issues linked to sustainability with two types of frameworks

1. "Protect, Respect and Remedy" which is a guideline of how companies should respect human and labor rights
2. Sustainable Development Goals (SDGs) which is a framework with a set of 17 macro objectives that any organization can pursue to improve the world and the social conditions of its inhabitants.

Image 4. Sustainable Development Goals

Source: www.sustainabledevelopment.un.org

Moreover, since December 2018, The United Nations is working on fashion sustainability through the publication of the Fashion Industry Charter for Climate Action. This Charter includes the vision and strategy to achieve a reduction of emissions, targeting a 30% reduction of greenhouse gases emissions by 2030 and net-zero emissions over 2050.

5.3. Industry action group

The same industry is also taking some sustainability measures in order to follow the trend of sustainability processes.

Fashion Pact

In April 2019 ahead of the G7 meeting, French president Emmanuel Macron unveiled the Fashion pact, an industry wide movement aimed at aligning the fashion industry with the United Nation

Sustainable Development Goals. The Fashion Pact is a global coalition of companies in fashion and textile industry (ready-to-wear, sport, lifestyle and luxury fashion) including their suppliers and distributors, all committed to a common core of key environmental goals in three areas: stopping global warming, restoring biodiversity and protecting the oceans:

- Stop global warming: by creating an action plan to achieve the objective of zero greenhouse gas emission by 2050, in order to keep global warming below a 1,5ºC pathway between now and 2100
- Restore biodiversity: by achieving objectives that use science-based programs to restore natural ecosystems and protect species
- Protect the ocean: by reducing the fashion industry's negative impact on the world's oceans through practical initiatives, such gradually removing the usage of single-use plastics

François- Henri Pinault, Kernig CEO, has involved 31 other brands in signing this pact, with the long-term objective of involving 20% of the fashion industry, to reach objectives.
Some of Fast Fashion groups participants are Inditex, Mango, H&M group, GAP INC. and Decathlon.

As the Fashion Pact is a guideline for the industry is not legally binding so may be not effective. Moreover, another point of criticism is the problem of outsourcing supply chain, this is where most of fashion industry's ecological footprint lies and sometimes the process of this part of the fashion pipeline are untransparent which puts obstacles when measuring if the objectives are being achieved.

Finally, in terms of Fast Fashion, the fastest changing collections and the mass production, these proposed objectives are not achievable unless production is reduced which will be counterproductive for these types of business models.

Camera Nazionale della Moda Italiana (CNMI)

The CNMI is one of the most important organisms in the fashion industry due to the large presence of this industry in Italy. They believe that sustainability is one of the most important values in fashion and they are constantly updating its work and ensure the continuous alignment with the industry through maintaining a Sustainability Roundtable reuniting personalities from major world brands such as Giorgio Armani.

Furthermore, CNMI had developed Principles for Retail Sustainability, offering guidelines for planning sustainable stores, from the materials to be used in the building, to ecological colors to indoor green and waste management. Also, they are proposing guidelines on eco-toxicological requirements for clothing, leather goods, shoes and accessories providing the limits on which chemicals can be used in the fashion supply chain.

CNMI wants to put sustainability at the forefront of fashion and they organize in collaboration with EcoAge and Italian Trade Agency the Green Carpet Fashion Awards every year since September 2017. In this event fashion brands and personalities are awarded, as well as innovative companies that are working to improve the current fashion footprint. In no one edition of the awards has a fast fashion brand been awarded.

5.4. Campaigns

Another key factor for the promotion of sustainable fashion are the campaigns of external agents of the industry such as Greenpeace, an activism organization or the campaign called fashion revolution impulse by consumers.

Greenpeace Detox campaign

Greenpeace launched the Detox campaign in 2011 to raise awareness on the problems linked to the textile industry and the lack of responsibility claimed in the industry. In concrete the campaign had the aim "to expose the direct links between global clothing brands, their suppliers and toxic water pollution around the world" (Greenpeace).

During the past three years Greenpeace is publishing the "Detox catwalk" in order to know which clothing companies are on the path to delivering toxic-free fashion and which ones are accomplishing their commitments and greenwashed promises.

The organization classifies the 18 major fashion companies in three groups using three mains criteria. First one is if their commitment the company is removing priority chemicals such as Phthalates and APEOs; secondly substituting PFCs (perfluorocarbons) with safer alternatives, and finally how transparently they report the data:

- Detox leaders: are the companies with commitments towards toxic-free future with credible timelines, concrete actions and on-the-ground implementation.
  In this category we found the fast fashion companies such as CA, H&M, INDITEX and Mango
- Greenwashes: companies with commitments that nowadays they hadn't been able to take individual corporate responsibility for their chemical pollution. Ex: Nike
- Detox losers: Uncommitted companies that refuse to take responsibilities for their toxic footprint. One example of this category in terms of Fast Fashion is the company GAP

Fashion Revolution campaign

Nowadays more and more consumers are interested in understanding how and where their clothes are made. The Fashion Revolution is an NGO formed by designers, academics, writers, business leaders, retailers, marketers and consumers who encourage to make a cultural, industry and political change.

This organization started to give a voice to consumers, inviting them to actively ask fashion brands information of their pipeline and relative impacts with a "Who made my clothes" campaign by becoming a selfie with the clothes inside out and sharing it in social media with the hashtags #WhoMadeMyClothes and #WhoHidMyClothings.

The key factor of this association is the ability to raise awareness in consumers requiring an immediate response from corporations, which are otherwise faced with a very high reputational risk.

5.5. Consumers and buying behavior

One of the main agents in the fashion industry is the consumer. We use clothing to represent who we are and at the same time fashion is a powerful cultural, political and financial force.

It is clear that overproduction, with some incentives such as social media, leads to overconsumption and vice versa. So, consumers have part of power and responsibility to change the Fast Fashion model as the living planet cannot handle this amount of overproduction, overconsumption and waste. As we face an unprecedented climate crisis and a deep economic crisis due to Covid-19, we cannot continue making, buying and discarding clothing at the rate we have done for the past decades.

According Euromonitor International (2020) global clothing consumption has more doubled from 74,3 billion items of clothing and footwear in 2005 to 130,6 billion items in 2019 and WRAP (2020) estimates that the value of unused clothing in British wardrobes is around 33 billion of euros, while 156 million worth of clothing goes into the landfill each year. If it continues like this, we could expect production and consumption of clothing and footwear to triple by 2050 (Ellen MacArthur Foundation, 2017).

Nevertheless, people are becoming increasingly concerned about social and environmental impacts of industries.

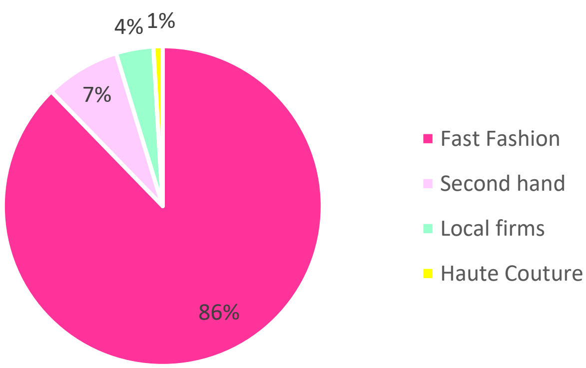
5.5.1. Consumer behavior research

In order to know the level of consumer awareness regarding unsustainability of Fast Fashion model and detect if there is a real predisposition from consumers to change their consumption behavior I have carried out a qualitative research based in a survey of 11 questions *(Annex 1 and 2)* and a focus group in order to query in consumers opinion and values *(Annex 2).*

During the research 108 people aged between 16 years and 75 years old have been surveyed, and in the case of the focus group it was carried out via Skype due to the current situation affected by the Covid-19 with the participation of 7 people (6 women, 1 men) of ages between 20 and 23 years old.

The results have been the following:

Figure 10. Where do consumers buy clothes?



Source: Own elaboration

We can observe that most (86%) of respondents buy their clothes in Fast Fashion companies, and in all age ranges Fast Fashion is around 80%.

Moreover, in young ages it is seen that the second option to buy clothes is through second hand stores meanwhile, in mature ages the second option more frequent of consumption is in local stores with 8% of respondents. This behavior can be influenced by different levels of disposal income, the increasing luxury second-hand market and the different level of clothing waste awareness.

Figure 10.1. Where do consumers buy clothes?

Target	Fast Fashion	Second Hand	Local firms
Ultra-young (16-20)	82%	9%	0%
Young (21- 30)	86%	10%	3%
Adults (More than 30)	88%	0%	8%

Source: Own elaboration

Additionally, when we asked about the clothing consumption frequency a 77,8% of people surveyed go shopping less than once a month. Also, there is a 17,6% who goes between once and twice a month and 3,7% who goes between 3-4 times per month. This last two groups of people are formed by respondents between 16 and 25 years old.

During the focus group, participants explained that both their parents and younger siblings tend to go less frequently to buy clothes. *"The first ones usually do it out of necessity and the youngest people do not have a disposal income to do it"* they assure it.

Also, they were asked to think about the moment when they decide to buy clothes.

"I usually go shopping when I get tired of the clothes I have in the closet and I also used to go at the end of each university semester as a reward"

Anonymous participant (2020)

"When I am bored, and I have free time I look at clothes online and usually I end up buying something (…) And also, I buy when I need more formal clothes to go to work"

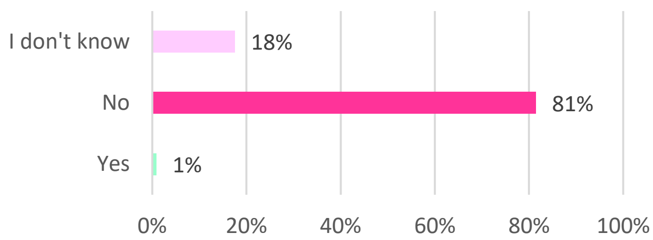
Anonymous Participant (2020)

"I depend on whether if I have received my salary or not and above all I take advantage if there are sales"

Anonymous participant (2020)

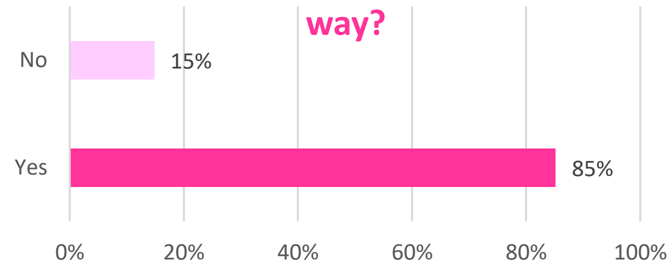
So, we can observe a slightly different behavior across generations, younger people are more constraint with disposal income but even so, the frequency of purchase is slightly higher than adults. Younger surveyed are more used to buying in second hand stores while adults are more used to local fashion stores. Also, it seems that the motivation to take the decision to buy can differ across generations, but generally, necessity is not the one and only factor who drive this motivation and the boredom of clothes we already have or the factor of feeling better also play an important role. However, Fast Fashion companies are the one chosen by the clear majority of consumers.

Figure 11. Do you think a piece of clothes will be of less quality if it is sustainable?



Source: Own elaboration

Figure 12. You will be willing to pay a higher price if the garment is manufactured in a sustainable way?



Source: Own elaboration

In terms of consumer perception of sustainable clothing and predisposition to consume it even if it means paying a higher price the results are positive. An 81% of respondents do not have the perception will be of less quality if it is sustainable. One of the survey respondents comment this:

"If the use of sustainable materials translates into good quality products, I have no problem using them"

Anonymous Surveyed respondent (2020)

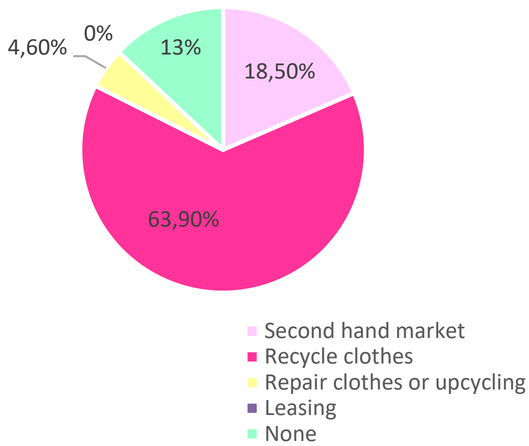
If we put the focus on pricing, we can observe that an 85% of consumers would be willing to pay a higher price if the clothing is manufactured in a sustainable way meaning that respect our environment and the labor condition of workers. This information can be nuanced with some of the opinions of the focus group participants.

"The maximum that I would pay to acquire a sustainable product is 10€ more than the original product"

Anonymous participant (2020)

Additionally, a research of Ipsos Mori in 2018 shows that the 62% of respondents would pay between 2-5% more for expensive item of clothing if it meant that garment workers were paid a fair living wage. Also, a 35% of American consumers would pay 25% more than the original price for sustainable products.

Figure 13. Did yo ever use one of these services?



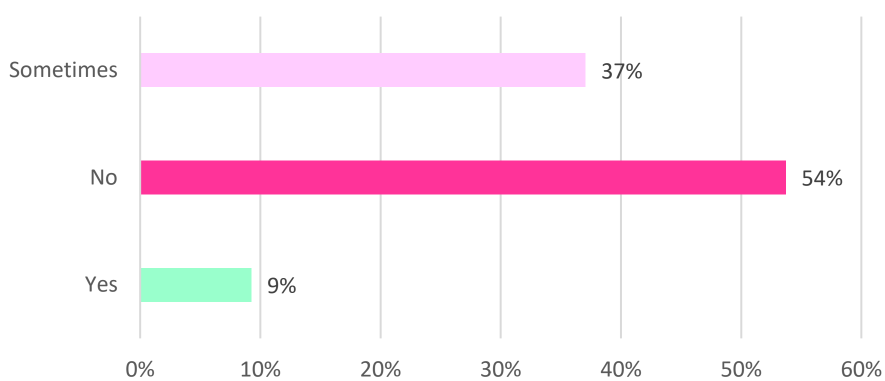
Source: Own elaboration

Are consumers using the alternative that nowadays the industry is offering?
Only a 18,50% of consumers have ever shopped at a second-hand store and none of participants has rented clothes for some special occasion.

Unsustainable actions also occur in the post- purchase phase. We can observe that a 63,9% recycle their clothes using the textile recycle bins distributed in every locality.

Only a 4,60% try to repair or upcycling; use products, materials and waste to create new materials or products. And 13% of people surveyed have never used any of these alternatives.

Figure 14. Do you look at the label or find out how clothes are made or whether they are sustainable when you buy?



Source: Own elaboration

Although, people are still buying more and paying less for their clothes, some researches shows that mindset are beginning to shift.

A market research from Ipsos Mori (2018) found that more than one in three people said that they consider social and environmental impacts when they are buying.

Nevertheless, the results obtained do not agree much with research of Ipsos Mori. Only a 9% of respondents assure that they look at the label or find out how clothes are made or whether they are sustainable when they are buying it. A 37% of survey participants have not the habit of informing themselves or reading the label of clothes which they are about to buy.

Even tough, there is also 37% respondents who say that they sometimes inform themselves about sustainability of their clothes. This data can indicate a positively tendency by consumer in order to starting consider social and environmental impacts when they are buying lining up on studies already done.

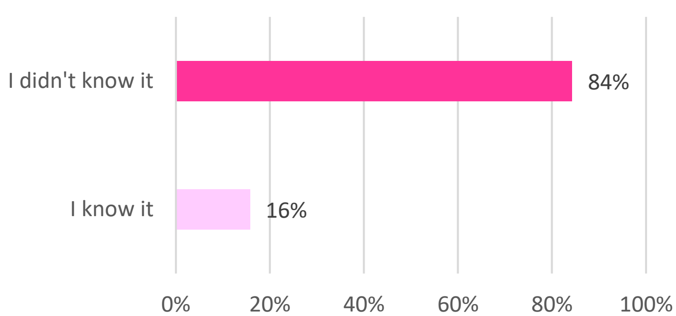
To know the level of information of consumer, they have been shown the most relevant data regarding the environmental impact and the solutions that are beginning to appear in the industry. In terms of environmental impact, the information given was:

- Making a t-shirt spends 2.700 liters of water which is the equivalent of what a person drinks in 900 days.
- All the surplus stock of large multinationals is not stored but burned.

In terms of industry solution, the information given to the respondents was the following one:

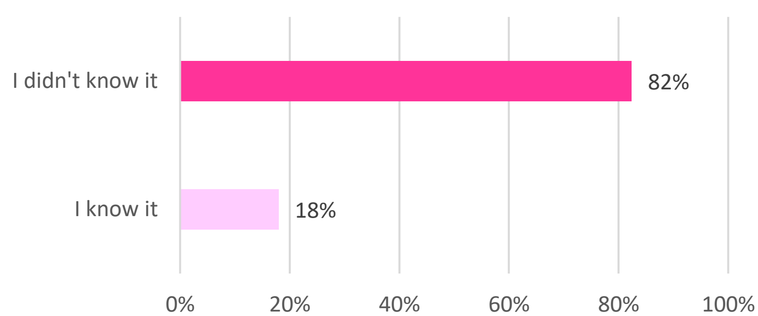
- The existence of fabrics made of orange, pineapple or mushrooms skin and the appearance of clothes made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada.

Figure 15. Consumer knowledge about enviroment information of Fast Fashion



Source: Own elaboration

Figure 16. Consumer knowledge about sustainablity solutions in the Fashion industry



Source: Own elaboration

In both cases the clear majority of participants do not have this information. Moreover, some comments made by surveyed and focus group participants shows us that they wanted more information about the clothes they buy.

"It would be good to make children aware of this issue, because if I has been told all this since I was a child I would have a more critical and sustainable view of the world of fashion."

Anonymous surveyed respondent (2020)

"I think if there was more knowledge on this subject we would think a lot more about buying, although everyone's economy is what makes the difference."

Anonymous surveyed respondent (2020)

The obligation to put on the label how the clothes are made and that is easy to see should be mandatory"

Anonymous participant (2020)

Figure 17. Consumer degree of sustainable information by ages

Target	Consumers informed before a purchase (Figure 14)	Consumers informed about environmental impact (Figure 15)	Consumers informed about sustainable solutions (Figure 16)
Ultra-young (16-20)	0%	18%	9%
Young (21- 30)	8%	11%	15%
Adults (More than 30)	17%	29%	29%

Source: Own elaboration

Also, we should underline that adults are the one who claim to be more aware or have more information about sustainable and Fashion industry and informed youngsters do not exceed 18% of younger respondents. Finally, the habit of looking at label before buying is not implemented in society and has a negative correlation with age.

"Few brands offer sustainable clothing and mass manufacture without guaranteeing safety in processes and control of emissions or waste. All in China, India, Morocco always looking for cheap labor and dodge legality and labor pacts and rights reached in the European Community Manufacture cheap, do not comply with the law and sell here with complete freedom, Pathetic!!"

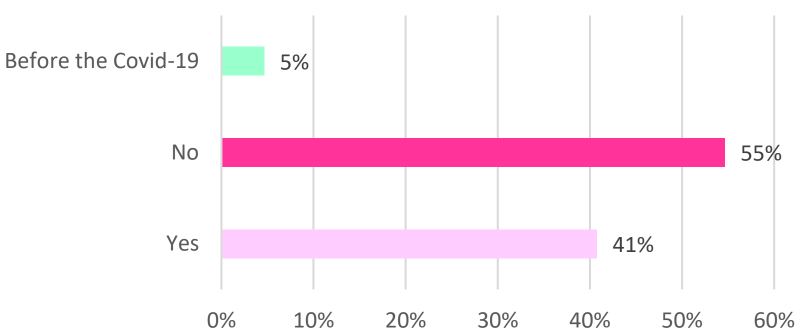
Anonymous more than 35 years respondent (2020)

Although these analytics, some of the youngest respondents made interesting comments demonstrating that they are informed and have an opinion formed.

"I think the problem of sustainability lies in the consumerisms concept fashion and seasons, which are becoming shorter and shorter force the user, through marketing and advertising techniques, to create the need to want more clothes. A sustainable and QUALITY clothing trade would reduce the sustainable impact while increasing production costs. The problem is that many companies cannot afford to offer such low profit margins and prioritize economic over social and environmental interest. This is the problem of today's society. The solution: look for a triple balance."

Anonymous 16-20 years respondent (2020)

Figure 18. As a result of Covid-19 crisis , have you considered changing the way you consume Fashion and buy more in local stores?



Source: Own elaboration

During the last months we are experiencing an extraordinary situation of a Worldwide Pandemic of coronavirus.

It is obvious that this pandemic is leading to an economic crisis, it has paralyzed the fashion supply chain and consumer demand has collapsed. Will the Fashion industry go back to the way it was?

From consumers point of view, 41% of respondent's assure that they have considered to change the way they are consuming Fashion because of Covid-19. Meanwhile a 55% of consumers surveyed haven't rethought the way they consume fashion and a 5% had already rethought it before this situation arose.

During the focus group 6 of the 7 participants have not considered changing the way of fashion consumption and 4 out of 7 participants have taken advantage of this situation to buy clothes online because of the boredom of quarantine. All of them have bought from Fast Fashion companies. Finally, they all agree that would be willing to change the way they consumed if the price was affordable and not far from current Fast Fashion companies' prices.

"This quarantine as I was bored I made orders of clothes to Zara and Pull and Bear"

Anonymous participant (2020)

"I would consider a change if the prices were not too far from the existing ones and more, with this crisis situation in which I would not have so much money to spend it to go shopping."

Anonymous participant (2020)

Consumer behavior research conclusions

To sum up, with this consumer research we could observe that there is slightly different behaviors and degrees of information's across generations but in all segments of the population surveyed Fast Fashions companies are the first preference to buy clothing.

Also, there is a predisposition from consumer to pay higher prices and change their behavior towards one that is more aligned with sustainability but rang of prices would not be higher than 105 of the actual Fast Fashion prices.

In terms of consumer awareness of the sustainable issues in the fashion industry we must say that is growing, people are increasingly making the link between climate change and what they wear but it is needed much more social awareness since the age people start to be old enough to consume economically individually.

So, we need more people to be aware of fashion's social and environmental impacts; we need more and better information about these impact, transparency of companies would be a key factor; and finally build a bridge between what consumers say they care (behavior predisposition) and about how they spent their money, in this case price would be the key factor.

6. SOLUTIONS TO SUSTAINABILITY IN FAST FASHION

Fast fashion companies and the global Fashion industry need a systemic change that will require both individual and community to change and transform our economic and legal systems. Nowadays the industry is offering alternative such as:

- Recycling garments or fibers
- Repairing or upcycling old clothes which allow to modify the stylish of unwanted clothes garments that otherwise will be thrown away.
- Renting/Leasing which is a new business model that allow to reduce the need to buy one-time outfits.
- Second hand which is about reselling non-used accessories and clothes instead of throwing away.

As we have seen in the consumer behavior research these alternatives are not being used as much for the society so, from my point of view the three-key factor for the change will be the following ones:

6.1. Innovation

The industry is in a powerful position to make changes from the inside and the innovation in the manufacture process would be very important. Fast Fashions companies mostly are the largest in the industry, so they have the resources, marketing power and moral responsibility to do it.

In the field of new textiles and materials, a benchmark for Fast Fashion companies are innovative start-ups, as their structure allows them experiment new business models, generating solutions to the sustainable issues.

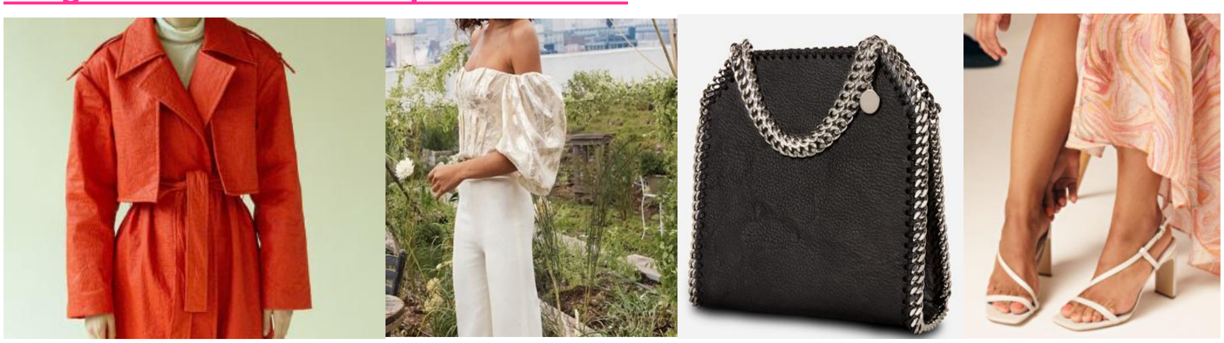
Vegea is a company that "develop plant-based alternative to fully synthetic oil-derived materials for fashion, furniture, packaging, automotive and transportation." In particular they are collaborating with Italian wineries and they have developed a process for the valorization of wine waste in order to achieve a wine-delivered leather. Moreover, no toxic solvents, heavy metals and dangerous substances for humans and the environment are involved in the production process and they are continuously investing in research activities for the development of innovative environmental impact technologies and processes.

This company has received funding from the European Union's Horizon 2020 researches and innovation program and was awarded for Global Change Award in 2018. Also, H&M has been the first Fast Fashion company to use the Vega fabric in its H&M Conscious Exclusive Collection Summer Spring of 2020 in their bags and shoes.

Just as there is Vegea Company we also find other companies that offer sustainable materials. Orange Fiber company is the first business who offer high quality sustainable fabrics from citrus juice that would otherwise be thrown away. Ananas Anam an Spanish company created by Carmen Hijosa, who was shocked at the environmental impact of mass leather production and chemical tanning in the 1990's, developed Piñatex, an innovative natural textile made from waste pineapple leaf fiber. Also Bolt Threads company launched a leather product made of mushroom roots called Mylo, they have collaborated with Stella McCartney in her iconic Falabella bag.

Finally, among many other possibilities, we find nylon fibers created by recovered nets in the ocean or in landfills; the pioneering company is ECONYL and brands like Prada are already using it.

Image 5. Products made by Biomaterials



Pineapple leather	Orange Fiber	Mushroom Leather	Wine-derived leather
Source: ananas_anam.com	*Source: orangefiber.it*	*Source:Boltthreads.com*	*Source:Vegeacompany.com*

In order to obtain a degree of circularity in the Fashion industry, a model in which all the materials in a garment are reused and never end up as waste, one of the goals is to reduce leftover products. According to Eva Kruse (2013) 35% of the fabrics are not put up for sale since they serve to prove the print, the colour and the cut. Also, due to the cut many fabrics do not end up being used fully and end up being burned or thrown away.

Image 6. Upcycling clothes

Source: Tirarchy.com

Possible solutions include creating geometrics scheme and being able to use almost the 100% of fabric, up to use the upcycling option. This last proposal is emerging within Haute Couture clothing brands and with it has a possible future within Fast Fashion companies as they adopt trends of the major clothing brands.

Upcycling is based in reuse, objects and materials, in such way as to create a product of higher quality or value than the original.

6.2. Measurement

It is urgent to take action in terms of brands transparency and force companies to share with the public about their human rights and environmental polices, practices, impacts and supply chain. The publicly of this information can help trade unions and worker rights organizations to address and fix problems that workers are facing in factories that supply big brands.

Moreover, it is time for governments to play a more active role in regulating the industry, enforce the laws that already exist to protect workers and the environment and monitor them and finally, help consumer take better choices.

The relevant measures that we have nowadays are the following ones:

Global Reporting Initiative

Is a simple framework developed in the 90s' on which companies can refer to when aiming to report on their sustainability initiatives. The GRI Framework operates on three different topics: economic impact, environmental impact and social impact, each one with its own guidelines.

Today over 10.800 companies have submitted their GRI reports which are publicly available. In particular is useful for investors to evaluate the results of a sustainable strategy and its long-term approachability.

Supply chain management measures

To measure sustainability during the supply chain we have three instruments: The Global Organic Textile Standards, the ECO-LABEL granted by European Union and the Higg Index. This one was developed by the Sustainable Apparel Coalition with the goal to create an intra-industry measure for benchmarking a company's attention to sustainability issues in each step of its production phase.

Higg index is focus in the assessing the relative environmental and social impact generated by three steps evaluation program focus on Brand, Facilities and Products. While the Higg Index allows investors to have a complete picture of the pipeline, and the labels allow consumers to immediately acknowledge eco-products.

Brand assessment index

In the aspect of brand assessment there are three main tools which are subjective to the opinion of organizations that elaborates them. We should consider that there is more than one organization elaborating them.

The Rank A Brand is one of many independent and reliable brand comparison websites that asses and ranks consumer brands in several sectors on sustainability and social responsibility. In this case they rank brands according to brands websites, annual reports, CSR reports and other public sources.

The Fashion Transparency Index carried out by several organizations between them Fashion Revolution NGO. They reviewed 250 of the world's largest fashion brands and retailers and ranked them according to how much they disclose about their social and environmental policies, practices and impacts. Transparency is not about which brand does the best or is more sustainable, but about who discloses the most information; and without transparency we cannot see or protect vulnerable people and the living planet.

Finally, from the point of view of brand assessment, we have **the B Impact Assessment** promoted by B-Lab. This assessment is based on a personalized questionnaire for each company evaluating the governance of the brand, workers, community and environment. At the end, the company is assigned a total score on a scale from 0 to 200. With an 80/200 the firm achieves a certification of BCorp and also, the results obtained are accessible for both investors and consumers.
By assessing the overall footprint of a brand will allow consumers to objectively select the most sustainable brand or at least be aware of what project they are participating in.

Even if all these measures exist, the diffusion of sustainable fashion is suffering from overcrowding of **non-standardized measurement system**, which prevent investor and consumers to have a clear overview of the second most polluting industry in the world.

6.3. Communication

Marketing Communications are one of the principal's sources of information that consumers and investors can rely on, or at least is the brand's first impression.

Communicating sustainability can be a key factor for different reasons:

- It can help in managing any brand reputational risk.
- It can generate a system where reference or model companies positively influence other companies as well as consumers.
- It enhances the efforts made in the implementation of sustainable strategies in the eyes of investors and consumers
- Can help brands that form sustainability strategies by compliance achieve the status of leaders in the green fashion race.

Image 7. Don't buy this Jacket (Patagonia)

Source: Brandchannel.com

In 2011, Patagonia published a full-page advert in the New York Times proclaiming consumers to not buy a jacket of their own brand. It was a call to (in)action on Black Friday, the annual climax of consumption at the end of November on the worldwide retail market.

The advert not only shows the jacket which definitely shouldn't be bought, but also lists the reasons why you shouldn't buy it. It explains that the production of the jacket in question required 135 litres of water, equivalent to the daily requirements of 45 people. Its transport to the warehouse created almost ten kilos of CO2, or 24 times the weight of the jacket itself. (Patagonia, 2011).

It may seem a risky campaign, but the company was able to project the values of Patagonia and gain maximum exposure over the world. The campaign was built on the premise that there is a growing willingness to pay more for products that attempt to change the social and environmental processes for better. Patagonia's sales revenues tripled between 2011 and 2015, rising to $750 million and the jacket was sold better than ever (Prodir, 2017).

7. COVID-19

The COVID-19 crisis will cause serious consequences in the textile industry. The stoppage in production and the difficulties in making international shipments, are now joined by problems in designing and planning new collections. And in this, Fast Fashions are the most affected due to they accelerated cycle, their supply chain and the commercialization of several monthly collections.

On the one hand, the volume of consumption has suffered an important decrease. The psychological stat of concern makes us not too keen to acquire new clothes or simply our economy does not allow. Also, if we talk in terms of online purchases, the fact that the distribution involves always third parties, also exposing their lives, is a huge impediment to buy for many people. Therefore, many purchases will be deferred.

On the other hand, the closing of stores can lead to huge material costs which may take up to two seasons to recover. Also, there are a series of one season collections that have not been sold and therefore cannot be amortized. It would be Fast Fashions companies who receives the biggest impact, since the accumulation of stock is much higher due to its high manufacturing volume. However, the brands that produce more slowly, will not have as much stock accumulation, which will allow them better adaptation to the new rhythms of the industry.

Fast Fashions, surely, must be readapted with smaller collections from more sustainable supply chain. They probably would be more focus on flexible sourcing, and proximity supply chains would be preferred over countries with lowers costs, like Bangladesh, in order to reduce the clothing export dependence.

Coronavirus crisis has exposed the deep inquietudes in our social and economic systems and has been verified the impact of human activity has on the planet. This has increased awareness among consumers who surely, will place less confidence in mass-production based in quantity over quality.

Therefore, everything points to a transformation of the business model to make it more sustainable.

8. CONCLUSIONS

Fast fashion is a business model based on a quick response through an effective outsourced manufacturing process, catching the latest trends from catwalks, streetstyle and celebrities and transforming these trends in products produced at a lowest cost as possible. These products are sold at an affordable price and they have a short "life cycle" due to the high production rotation of Fat Fashions.

Consequently, nowadays Fast Fashion brands produce about 52 "micro seasons" a year which is a new collection every week, fact that leads us to an overproduction and overconsumption of fashion.

It has been observed that the operation of this business model is not sustainable and only analyzing the fashion pipeline can be detected that unsustainable practices have presence in all fashion steps, from the production of fabrics till the product is delivered to consumer.

In many cases it is violated human rights and working conditions, fire safety garment workers is not considering and in factories there are child exploitation and gender discrimination, adding their wages which do not reach the actual living salary in most countries.

From the environmental point of view the model is not sustainable either, water pollution, toxic chemicals and plastics and the constant waste of clothing's, among other, make fashion the second most polluting industry producing a 10% of global carbon emissions

Analyzing these effects that the model has on the planet and society, we see that it has no long-term viability and a transformation is needed.

We see that actually there are some soft laws and legislations, but they are scarce and unclear. Also, both industry and associations are beginning to act, but in many cases, it seems to be simply compliance approach.

Moreover, has been verified a predisposition from consumer to pay higher prices and change their behavior towards one model more aligned with sustainability. People are increasingly making the link between climate change and what they wear but it is needed much more social awareness what goes demanding transparency to the brands.

The solutions proposed in this work to make the Fast Fashion model more sustainable are the following ones:

- Innovation in the design and manufacturing process using existing biomaterials and techniques such as upcycling.
- Agree on a standardized measurement system which will prevent investor and consumers to have a clear overview and force brands to be more transparent.
- Use of communication for the dissemination of brand sustainability.

To sum up, realizing this project it has been possible to observe the unfeasibility of this business model putting on the table the real costs of Fast Fashions. But at the same time, it has been seen that the agents that make up the fashion industry, including consumers, are beginning to move towards changing this model towards a more sustainable one, and the solutions are totally viable.

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ANNEX 1: CONSUMER SURVEY

Fast Fashion i sostenibilitat

Sóc una alumna de 4rt de carrera d' ADE i estic realitzant el Treball de Fi de Grau sobre la Fast Fashion i la sostenibilitat d' aquest model d' empresa.
El següent Qüestionari consta de 11 preguntes molt breus relacionades amb els vostres hàbits de consum de moda.
* Required

1. 1. Edat *

Check all that apply.

- [ ] 16 - 20
- [ ] 21 - 25
- [ ] 26 - 30
- [ ] 30 - 35
- [ ] Més de 35

2. 2. A quines botigues sols comprar la teva roba? *

Mark only one oval.

- ◯ Zara, Mango, Pull and Bear, HM...
- ◯ Firmas locals: Laagam, ese o ese, brownie...
- ◯ Alta costura: Prada, Gucci, Balenciaga, Fendi, Bimba y Lola...
- ◯ Other: ____________________

3. 3. Amb quina freqüència vas a comprar roba, ja sigui online com offline? *

Mark only one oval.

- ◯ Menys d' un cop cada mes
- ◯ 1-2 cops al mes
- ◯ 3-4 cops al mes
- ◯ Més de 5 cops al mes

4. 4. Et fixes en l' etiqueta o t' informes sobre com estàn fabricades i si són sostenibles les peces de roba que compres? *

Check all that apply.

- [ ] Si
- [ ] No
- [ ] A vegades

ANNEX 1: CONSUMER SURVEY

5. 5. Estaries disposat/da a pagar un preu una mica superior si la peça de roba estigués fabricada de manera sostenible? (tant amb el mediambient com condicions laborals dels treballadors) *

Check all that apply.

- [ ] Si
- [ ] No

6. 6. Creus que una peça de roba sostenible serà de més baixa qualitat? *

Choose size and number per color

Check all that apply.

- [ ] Si
- [ ] No
- [ ] No ho sé

7. 7. Sabies que: La fabricació d' una samarreta gasta 2700 litres d' aigua que és l' equivalent al que beu una persona en 900 dies; i que tot l' stock sobrant de les grans multinacionals no s' emmagatzema sino que es crema. *

Check all that apply.

- [ ] Si
- [ ] No

8. 8. Sabies de la existència de teles fetes amb pell de taronges, de pinyes o bolets i fetes amb fibres de niló recuperades de plàstics abocats al mar (Prada ja ho utilitza) *

Check all that apply.

- [ ] Si
- [ ] No

ANNEX 1. CONSUMER SURVEY

9. 9. Has utilitzat algun cop algun d' aquests serveis? *

Mark only one oval.

- ⬭ Reciclar roba
- ⬭ Reparar roba o upcycling (per exemple destenyir roba blanca que no fas servirs)
- ⬭ Comprar a botigues de segona mà (Flamingo, Arizona Vintage...)
- ⬭ Llogar roba (vestits per ocasións especials)
- ⬭ Cap

10. 10. Arran de la crisi del Covid-19 t' has plantejat canviar la manera de consumir moda i comprar a firmes locals? *

Check all that apply.

- ☐ Si
- ☐ No
- Other: ☐ ____________________

11. 11. Comentaris, preguntes i idees

Moltes gràcies per la col·laboració!!

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ANNEX 2. DATA ANALYSIS

PLAN

Research method

Objective: Check the level of consumer awareness regarding unsustainibility of fast fashion
Detect if there is a real predisposition from consumers to change their consumption behaviour

Revel the behaviour and perception of target audience with a refernce of particular topic
(Understand how your audience take decisions)

Method: Qualitative research method
- Focus group
- General survey

Target:
- Focus group (20- 23 years, 6 women 1 man) via Sype
- General survey 16 to more than 35 years

Focus group

Question 1 In wich stores do you buy your clothes?
Question 2 How often do you buy clothes, both online and offline
Question 3 Why this frequency? / Feelings?
Question 4 Do you notice that your parents shop more often? And younger siblings?
Question 5 Do you look at the label or find out how they are made or whether they are sustainable when you buy? Ex: Joint life (Zara)
Question 6 You would be willing to pay a slightly higher price than usual if the garment is manufactured sustainably (both with the environment and labor conditions of workers)
Question 7 Did you know that: Making a t-shirt spends 2700 liters of water which is the equivalent of what a person drinks in 900 days; and that all the surplus stock of large multinationals is not stored but burned.
Question 8 Did you know of the existence of fabrics made of orange, pineapple or mushroom skin and made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada?
Question 9 As a result of the Covid-19 crisis we are experiencing, have you considered changing the way you consume fashion and buy in more local stores?

General survey

1. Age
   - 16-20
   - 21 - 25
   - 25 - 30
   - 30 - 35
   - More than 35
2. In wich stores do you buy your clothes?
   - Zara, Mango, Pull and Bear, HM
   - Local firms: Laagam, ese o ese, brownie
   - Haute Couture: Prada, Gucci, Balenciaga, Fendi...
3. How often do you buy clothes, both online and offline
   - Less tha once a month
   - 1-2 times per month
   - 3-4 times per month
   - More than 5 times a month
4. Do you look at the label or find out how they are made or whether they are sustainable when you buy? Ex: Joint life (Zara)
   - Yes
   - No
   - Sometimes
5. You would be willing to pay a slightly higher price than usual if the garment is manufactured sustainably (both with the environment and labor conditions of workers)
   - Yes
   - No
6. Do you think a pice of clothe will be of less quality if it is sustainable?
   - Yes
   - No
   - I don't know
7. Did you know that: Making a t-shirt spends 2700 liters of water which is the equivalent of what a person drinks in 900 days; and that all the surplus stock of large multinationals is not stored but burned.
   - Yes
   - No
   - Something sounds familiar to me
8. Did you know of the existence of fabrics made of orange, pineapple or mushroom skin and made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada?
   - yes
   - No
   - Something sounds familiar to me
9. Have you ever used any of these services?
   - Recycle clothes
   - Repair clothes or upcycling (dye a white t-shirt that you don't wear...)
   - Buy in second hand stores (Flamingp, Arizona Vintage...)
   - Rent clothes (dresses for important occasions...)
   - None
10. As a result of the Covid-19 crisis we are experiencing, have you considered changing the way you consume fashion and buy in more local stores?
    - yes
    - No
    - Others
11. Comments, questions and ideas

ANNEX 2. DATA ANALYSIS

Number	1. Age	2. In wich stores do you buy your clothes?	3. How often do you buy clothes, both online and offline?	4.Do you look at the label or f	5. You would be willing t	6. Do you think a pice of c	7. Did you know that: Ma	8. Did you know of the existence of fabric	9.Have you ever used any	10. As a result of the Covi
2	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	No	Yes	No	Recycle clothes	Yes
3	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	I don't know	No	No	Recycle clothes	No
4	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	I don't know	No	No	Recycle clothes	Yes
5	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	Yes	Buy in second hand store	Yes
6	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	Buy in second hand store	No
7	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	No	No	No	Buy in second hand store	No
9	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Buy in second hand store	Yes
10	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	None	No
12	21 - 25	Second hand	Less than once a month	Yes	Yes	No	Yes	Yes	Recycle clothes	Before covid
13	30 - 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	Yes	No	No	No	Recycle clothes	Yes
14	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	*Yes, No*	No	Yes	No	No	None	No
17	16 - 20	Second hand	1-2 times per month	Sometimes	Yes	No	Yes	No	Recycle clothes	No
20	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
21	More than 35	*I don't but based on the brand but on the quality,*	Less than once a month	Yes	Yes	No	*Yes, No*	Yes	Buy in second hand store	Yes
22	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	Recycle clothes	No
23	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	Yes
24	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	Yes	Recycle clothes	Yes
25	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	I don't know	No	No	Buy in second hand store	Yes
26	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	Yes
27	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	Yes	Recycle clothes	No
28	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	Yes	No	No	No	Recycle clothes	No
29	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	Yes	No	No	No	Buy in second hand store	Yes
30	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Buy in second hand store	Yes, second hand clothes
31	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	Yes	None	No
33	21 - 25	Second hand	Less than once a month	Yes	Yes	No	No	Yes	Recycle clothes	I didn't need the covid cri
34	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	None	No
35	21 - 25	Local firms: Laagam, ese o ese, brownie...	1-2 times per month	Yes	Yes	No	Yes	Yes	Recycle clothes	Yes
36	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	Yes
37	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	None	No
38	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	None	No
39	More than 35	Local firms: Laagam, ese o ese, brownie...	Less than once a month	Yes	Yes	No	No	No	Recycle clothes	Yes
40	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
42	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	Yes
43	More than 35	Local firms: Laagam, ese o ese, brownie...	Less than once a month	Sometimes	Yes	No	Yes	No	None	No
44	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	None	No
45	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	Yes
46	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
47	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	No	No	No	No	Buy in second hand store	No
48	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	I don't know	No	No	Recycle clothes	Yes
49	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
50	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	No	No	Yes	Buy in second hand store	Yes
51	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	Yes	No	Yes	No	Recycle clothes	No
52	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	Yes
53	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
54	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	I don't know	No	No	Recycle clothes	I reconsidered it
55	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	I don't know	No	No	Recycle clothes	I reconsidered it
57	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	Yes	No	Buy in second hand store	Yes
58	16 - 20	Zara, Mango, Pull and Bear, HM...	1-2 times per month	*Sometimes/no*	Yes	*No, I don't know*	No	*Si, No*	Buy in second hand store	Yes
59	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
60	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	I don't know	No	No	Recycle clothes	Yes
61	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Buy in second hand store	Yes
62	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
63	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
64	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	No	Buy in second hand store	Yes
65	21 - 25	Zara, Mango, Pull and Bear, HM...	More than 5 times a month	No	No	No	No	No	Recycle clothes	Yes
66	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	Recycle clothes	No
67	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	I don't know	No	No	Recycle clothes	No
68	26 - 30	Second hand	Less than once a month	Yes	Yes	No	Yes	No	Buy in second hand store	Yes
69	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
70	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	Yes	Repair clothes or upcyclii	Yes
71	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	Yes	Recycle clothes	No
72	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	Yes	No	Recycle clothes	No
73	16 - 20	*Online stores*	Less than once a month	Sometimes	Yes	No	No	Yes	Recycle clothes	Yes
74	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
75	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
76	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Sometimes	Yes	No	No	No	None	Yes
77	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	Yes	Recycle clothes	Yes
78	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	No	No	No	Recycle clothes	Yes
79	16 - 20	Zara, Mango, Pull and Bear, HM...	3-4 times per month	No	No	No	No	No	Recycle clothes	Yes
80	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	None	No
81	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
82	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	I don't know	No	No	Buy in second hand store	No
83	21 - 25	Second hand	Less than once a month	Si	Yes	No	No	No	None	Yes
84	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
85	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	No
86	16 - 20	Zara, Mango, Pull and Bear, HM...	3-4 times per month	No	No	No	No	No	Recycle clothes	Yes
87	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	None	Yes
88	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
89	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Buy in second hand store	Yes
90	21 - 25	Haute Couture: Prada, Gucci, Balenciaga, Fendi, E	1-2 times per month	Sometimes	Yes	No	No	Yes	Buy in second hand store	Yes
91	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	I don't know	No	No	Buy in second hand store	No
92	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	Yes	Repair clothes or upcyclii	No
93	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Buy in second hand store	Yes
94	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	Yes	Buy in second hand store	No
95	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	No	No	No	Recycle clothes	No
96	21 - 25	Local firms: Laagam, ese o ese, brownie...	Less than once a month	No	No	No	No	Yes	Recycle clothes	No
97	21 - 25	Second hand	Less than once a month	No	*Si, No*	No	No	No	Recycle clothes	Yes
98	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
99	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
100	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Repair clothes or upcyclii	Yes
101	21 - 25	Zara, Mango, Pull and Bear, HM...	3-4 times per month	Sometimes	Yes	No	No	No	Recycle clothes	No
102	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Buy in second hand store	No
103	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	Yes	Yes	Recycle clothes	No
104	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	No	No	No	Recycle clothes	No
105	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	No	No	No	Recycle clothes	No
106	21 - 25	Zara, Mango, Pull and Bear, HM...	3-4 times per month	Sometimes	Yes	No	No	No	Recycle clothes	No
107	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Sometimes	Yes	No	No	No	Recycle clothes	Yes
108	21 - 25	Second hand	Less than once a month	No	*Si, No*	No	No	No	Recycle clothes	Yes

ANNEX 2. DATA ANALYSIS

Detect if there is a real predisposition from consumers to change their consumption behaviour

		Actual behaviour	Actual behaviour			Actual behaviour	
Number	1. Age	2. In wich stores do you buy your clothes?	3. How often do you buy clothes, both onlir	5. You would be willing t	6. Do you think a pice of clothe will be of less quality if it is sus	9.Have you ever used any of these se	10. As a result of the Covid-19 crisis we are experiencing, have you considered changing the way you consume fashion ...
1	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	No
2	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	Recycle clothes	Yes
3	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Recycle clothes	No
4	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	I don't know	Recycle clothes	Yes
5	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingp	Yes
6	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Buy in second hand stores (Flamingo	No
7	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	Buy in second hand stores (Flamingo	No
8	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	No	Buy in second hand stores (Flamingo	No
9	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
10	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	None	No
11	21 - 25	Second hand	Less than once a month	No	I don't know	None	I hardly even buy, so i don't
12	21 - 25	Seond hand	Less than once a month	Yes	No	Recycle clothes	Before covid
13	30 - 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	Recycle clothes	Yes
14	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	Yes	None	No
15	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
16	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
17	16 - 20	Second hand	1-2 times per month	Yes	No	Recycle clothes	No
18	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
19	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
20	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
21	More than 35	*I don't but based on the brand but on the quality, timeless style and m*	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
22	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Recycle clothes	No
23	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
24	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
25	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Buy in second hand stores (Flamingo	Yes
26	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
27	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
28	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
29	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	Buy in second hand stores (Flamingo	Yes
30	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
31	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	None	No
32	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
33	21 - 25	Second hand	Less than once a month	Yes	No	Recycle clothes	I didn't need the covid crisis to not consume fashion dand not buy from big multinational firms.
34	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	None	No
35	21 - 25	Local firms: Laagam, ese o ese, brownie...	1-2 times per month	Yes	No	Recycle clothes	Yes
36	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
37	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	None	No
38	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	None	No
39	More than 35	Local firms: Laagam, ese o ese, brownie...	Less than once a month	Yes	No	Recycle clothes	Yes
40	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
41	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	None	No
42	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
43	More than 35	Local firms: Laagam, ese o ese, brownie...	Less than once a month	Yes	No	None	No
44	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	None	No
45	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
46	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
47	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	No	Buy in second hand stores (Flamingp	No
48	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	I don't know	Recycle clothes	Yes
49	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
50	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	Buy in second hand stores (Flamingo	Yes
51	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
52	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
53	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
54	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	I don't know	Recycle clothes	I reconsidered it
55	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	I don't know	Recycle clothes	I reconsidered it
56	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	No	I don't know	Recycle clothes	No
57	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingp	Yes
58	16 - 20	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	Buy in second hand stores (Flamingo	Yes
59	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
60	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	I don't know	Recycle clothes	Yes
61	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
62	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
63	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
64	16 - 20	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
65	21 - 25	Zara, Mango, Pull and Bear, HM...	More than 5 times a month	No	No	Recycle clothes	Yes
66	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Recycle clothes	No
67	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	I don't know	Recycle clothes	No
68	26 - 30	Second hand	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
69	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
70	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Repair clothes or upcycling (dye a wh	Yes
71	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
72	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
73	16 - 20	*Online stores*	Less than once a month	Yes	No	Recycle clothes	Yes
74	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
75	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
76	More than 35	Zara, Mango, Pull and Bear, HM...	1-2 times per month	Yes	No	None	Yes
77	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
78	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	Recycle clothes	Yes
79	16 - 20	Zara, Mango, Pull and Bear, HM...	3-4 times per month	No	No	Recycle clothes	Yes
80	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	None	No
81	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
82	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Buy in second hand stores (Flamingo	No
83	21 - 25	Second hand	Less than once a month	Yes	No	None	Yes
84	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
85	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
86	16 - 20	Zara, Mango, Pull and Bear, HM...	3-4 times per month	No	No	Recycle clothes	Yes
87	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	None	Yes
88	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
89	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
90	21 - 25	Haute Couture: Prada, Gucci, Balenciaga, Fendi, Bimba y Lola...	1-2 times per month	Yes	No	Buy in second hand stores (Flamingo	Yes
91	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	I don't know	Buy in second hand stores (Flamingp	No
92	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Repair clothes or upcycling (dye a wh	No
93	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	Yes
94	26 - 30	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	No
95	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	Recycle clothes	No
96	21 - 25	Local firms: Laagam, ese o ese, brownie...	Less than once a month	No	No	Recycle clothes	No
97	21 - 25	Second hand	Less than once a month	No	No	Recycle clothes	Yes
98	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
99	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
100	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Repair clothes or upcycling (dye a wh	Yes
101	21 - 25	Zara, Mango, Pull and Bear, HM...	3-4 times per month	Yes	No	Recycle clothes	No
102	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Buy in second hand stores (Flamingo	No
103	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
104	21 - 25	Zara, Mango, Pull and Bear, HM...	1-2 times per month	No	No	Recycle clothes	No
105	21 - 25	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	No
106	21 - 25	Zara, Mango, Pull and Bear, HM...	3-4 times per month	Yes	No	Recycle clothes	No
107	More than 35	Zara, Mango, Pull and Bear, HM...	Less than once a month	Yes	No	Recycle clothes	Yes
108	21 - 25	Second hand	Less than once a month	No	No	Recycle clothes	Yes

ANNEX 2. DATA ANALYSIS

	Total	Fast Fashion	Second hand	Local firms	Haute Couture	Others	
- Ultra young 16-20	11	82%	9%	0%	0%	Online stores	
- Young 21-25 / 26 - 30	73	86%	10%	3%	1%		
- Adults 30-35/ More than 35	24	88%	0%	8%	0%	I don't but based on the brand but on the quality, timeless style and more and more place of production and sustainability of fabrics	
- Total	108	86%	7%	4%	1%		

1. In all age ranges Fast Fashion consumption is around 80% of surveyed
2. In the younger age ranges it is seen as the second option to buy clothes is through second hand stores
3. In the mature age group the second option more frequent of consumption is local stores with 8% of surveyed

Fast Fashion	Second hand	Local firms	Haute Couture
86%	7%	4%	1%

6. Do you think a pice of clothe will be of less quality if it is sustainable?

	Total	Yes	No	I don't know
Ultra young 16-20	11	0%	91%	9%
Young 21-25 / 26 - 30	73	1%	75%	23%
Adults 30-35/ More than 35	24	0%	96%	4%
Total	108	1%	81%	18%

Yes	No	I don't know
1%	81%	18%

5. You would be willing to pay a slightly higher price than usual if the garment is manufactured sustainably (both with the environment and labor conditions of workers)

	Total	Yes	No
Ultra young 16-20	11	82%	18%
Young 21-25 / 26 - 30	73	82%	18%
Adults 30-35/ More than 35	24	96%	4%
Total	108	85%	15%

Yes	No
85%	15%

9.Have you ever used any of these services?

	Second hand market	Recycle clothes	Repair clothes or upcycling	Leasing	None
108	18.50%	63.90%	4.60%	0%	13%

10. As a result of the Covid-19 crisis we are experiencing, have you considered changing the way you consume fashion and buy in more local stores?

Yes	No	Before the Covid-19
41%	55%	5%

	Total	Yes	No	Before Covid-19
Ultra young 16-20	11	64%	36%	0%
Young 21-25 / 26 - 30	73	30%	63%	7%
Adults 30-35/ More than 35	24	63%	38%	0%
Total	108			

ANNEX 2. DATA ANALYSIS

Check the level of consumer awareness regarding unsustainibility of fast fashion

Number	1. Age	4.Do you look at the label o	7. Did you know that: Making a	8. Did you know of the existence of fabrics made of orange, pineapple or mushroom skin and made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada?
1	21 - 25	No	No	No
2	More than 35	Sometimes	Yes	No
3	21 - 25	Sometimes	No	No
4	21 - 25	No	No	No
5	More than 35	Sometimes	Yes	Yes
6	21 - 25	No	No	No
7	21 - 25	Yes	No	No
8	More than 35	No	No	No
9	21 - 25	No	No	No
10	21 - 25	No	No	No
11	21 - 25	Sometimes	No	No
12	21 - 25	Yes	Yes	Yes
13	30 - 35	No	No	No
14	21 - 25	No	No	No
15	More than 35	No	Yes	No
16	More than 35	Sometimes	Yes	Yes
17	16 - 20	Sometimes	Yes	No
18	21 - 25	No	No	No
19	More than 35	No	No	No
20	21 - 25	No	No	No
21	More than 35	Yes	No	Yes
22	21 - 25	No	No	No
23	21 - 25	No	No	No
24	More than 35	Sometimes	No	Yes
25	16 - 20	Sometimes	No	No
26	More than 35	No	No	No
27	21 - 25	Sometimes	Yes	Yes
28	More than 35	Yes	No	No
29	21 - 25	No	No	No
30	21 - 25	No	No	No
31	26 - 30	No	No	Yes
32	21 - 25	No	No	No
33	21 - 25	Yes	No	Yes
34	21 - 25	No	No	No
35	21 - 25	Yes	Yes	Yes
36	21 - 25	Sometimes	No	No
37	21 - 25	No	No	No
38	26 - 30	No	No	No
39	More than 35	Yes	No	No
40	21 - 25	No	No	No
41	21 - 25	No	No	No
42	More than 35	Sometimes	No	No
43	More than 35	Sometimes	Yes	No
44	More than 35	No	No	No
45	More than 35	No	No	No
46	21 - 25	No	No	No
47	21 - 25	No	No	No
48	21 - 25	Sometimes	No	No
49	21 - 25	No	No	No
50	More than 35	Sometimes	No	Yes
51	More than 35	Yes	Yes	No
52	16 - 20	No	No	No
53	16 - 20	Sometimes	No	No
54	21 - 25	Sometimes	No	No
55	21 - 25	Sometimes	No	No
56	21 - 25	No	No	No
57	21 - 25	No	Yes	No
58	16 - 20	No	No	No
59	21 - 25	Sometimes	No	No
60	21 - 25	Sometimes	No	No
61	21 - 25	No	No	No
62	16 - 20	No	No	No
63	16 - 20	Sometimes	No	No
64	16 - 20	Sometimes	Yes	No
65	21 - 25	No	No	No
66	21 - 25	No	No	No
67	More than 35	Sometimes	No	No
68	26 - 30	Yes	Yes	No
69	21 - 25	Sometimes	No	No
70	More than 35	Sometimes	Yes	Yes
71	21 - 25	Sometimes	Yes	Yes
72	21 - 25	No	Yes	No
73	16 - 20	Sometimes	No	Yes
74	21 - 25	No	No	No
75	21 - 25	No	No	No
76	More than 35	Sometimes	No	No
77	More than 35	Sometimes	No	Yes
78	21 - 25	No	No	No
79	16 - 20	No	No	No
80	21 - 25	Sometimes	No	No
81	More than 35	Sometimes	No	No
82	21 - 25	No	No	No
83	21 - 25	Yes	No	No
84	21 - 25	No	No	No
85	21 - 25	Sometimes	No	No
86	16 - 20	No	No	No
87	21 - 25	No	No	No
88	21 - 25	No	No	No
89	21 - 25	No	No	No
90	21 - 25	Sometimes	No	Yes
91	21 - 25	Sometimes	No	No
92	21 - 25	No	No	Yes
93	21 - 25	Sometimes	No	No
94	26 - 30	Sometimes	No	Yes
95	21 - 25	No	No	No
96	21 - 25	No	No	Yes
97	21 - 25	No	No	No
98	21 - 25	No	No	No
99	21 - 25	No	No	No
100	21 - 25	Sometimes	No	No
101	21 - 25	Sometimes	No	No
102	21 - 25	No	No	No
103	21 - 25	Sometimes	Yes	Yes
104	21 - 25	No	No	No
105	21 - 25	No	No	No
106	21 - 25	Sometimes	No	No
107	More than 35	Sometimes	No	No
108	21 - 25	No	No	No

	Total	Label	Enviromental impact	Solutions	Others
- **Young 21-25 / 26 - 30**	73	8%	11%	15%	
- **Adults 30-35/ More than 35**	24	17%	29%	29%	
- **Ultra young 16-20**	11	0%	18%	9%	
- **Total**	108	9%	16%	18%	

1. Adults are the ones who claim to be more aware or have more information
2. Informed youngsters do not exceed 15% of respondents
3. The habit of looking at the label before buying is not implemented in society and has a negative correlation with age

4.Do you look at the label or find out how they are made or whether they are sustainable when you buy? Ex: Joint life (Zara)

Yes	No	Sometimes
9%	54%	37%

7. Did you know that: Making a t-shirt spends 2700 liters of water which is the equivalent of what a person drinks in 900 days; and that all the surplus stock of large multinationals is not stored but burned.

I know it	didn't know it
16%	84%

8. Did you know of the existence of fabrics made of orange, pineapple or mushroom skin and made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada?

I know it	I didn't know it
18%	82%

Participants: 7

Focuse group	
Question 1	In wich stores do you buy your clothes?
Question 2	How often do you buy clothes, both online and offline
Question 3	Why this frequency? / Feelings?
Question 4	Do you notice that your parents shop more often? And younger siblings?
Question 5	Do you look at the label or find out how they are made or whether they are sustainable when you buy? Ex: Joint life (Zara)
Question 6	You would be willing to pay a slightly higher price than usual if the garment is manufactured sustainably (both with the environment and labor conditions of workers)
Question 7	Did you know that: Making a t-shirt spends 2700 liters of water which is the equivalent of what a person drinks in 900 days; and that all the surplus stock of large multinationals is not stored but burned.
Question 8	Did you know of the existence of fabrics made of orange, pineapple or mushroom skin and made of nylon fibers recovered from plastics that are dumped into the sea and used by brands such as Prada?
Question 9	As a result of the Covid-19 crisis we are experiencing, have you considered changing the way you consume fashion and buy in more local stores?