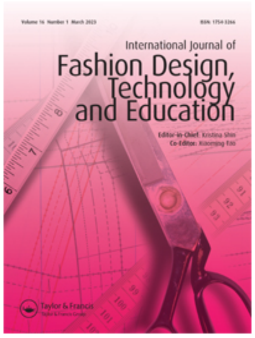

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Drivers and barriers for sustainable fashion consumption in Spain: a comparison between sustainable and non-sustainable consumers

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ABSTRACT

This research identifies and portrays the under-researched segment of sustainable fashion consumers, drawing a comparison with the average consumers in Spain, and defines the drivers and barriers for sustainable fashion consumption, further contributing to the attitude-behaviour gap literature. Based on a sample of 1,063 respondents and 23 focus group participants, and following the Theory of Planned Behaviour, the results indicate that lack of trust in fashion companies and their sustainable statements is the main reason preventing consumers from buying sustainable products or doing it more often, followed by higher prices. It appears that the more sustainably conscious consumers are, the less they buy brand-new, preferring alternatives such as second-hand (mainly) and renting. Sustainable fashion consumers demonstrate greater fashion consciousness, environmental concern, perceived consumer effectiveness, and a higher subjective norm than average consumers. Conversely, price is still a critical purchasing driver for the average consumer.

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KEYWORDS
Sustainable fashion consumption; collaborative fashion consumption; slow fashion; price sensitivity; transparency

1. Introduction

The fashion industry has undergone several waves of 'sustainability awareness' since the 1960s. In 1996, James A. Roberts profiled green consumers and highlighted that 'Once again there is renewed sensitivity toward the environment and social consciousness' (p. 217), and, since 2013, after the *Rana Plaza* disaster in Bangladesh in which over 1,130 fashion workers were killed, it can be said again that the global concern about fashion and sustainability has re-emerged. Furthermore, as Roberts (1996, p. 217) underlined that 'the current [referring to the 1990s] sustainability sensitivity focuses on consumer purchase behaviour (Wells, 1990)', in contrast to few decades before when political solutions to the environmental and social issues gathered most of the attention.

Nevertheless, within the literature, limited research investigated the motivations driving consumers of sustainable fashion (SF) (Wiederhold & Martinez, 2018). Davies and Gutsche (2016) noted there was minimal research observing actual buying behaviour in sustainable consumption literature[1] questioning how much it is genuinely known about sustainable consumption practice. Hence, a better understanding of why and how consumers engage in a particular behaviour is needed.

For that purpose, this research opted for a mix-method approach: three focus groups – one focalised on SF consumers and the other two dedicated to a broader range of consumers – to contrast the purchase behaviour between both groups (sustainable vs. non-sustainable consumers) and a survey with 1,063 respondents to validate the results with a statistically relevant sample. The Theory of Planned Behaviour (Ajzen, 1991) was used as theoretical background to explore the differences in Environmental Concern (EC), Subjective Norm (SN), Perceived Consumer Effectiveness (PCE), and Future Purchase Intentions (FPI) of sustainable consumers, drawing a comparison with the average consumer through descriptive statistics. In addition, culture and the social environment play a crucial role in a person's decision-making. Bucic, Harris, and Arli (2012) conducted a cross-national study that showed that country of residence shapes decision-making on sustainable products. Thus, this research focused on the Spanish consumers and the Spanish fashion market, which have their particular characteristics.

In summary, this research had the following objectives: (1) To explore consumers' perception and consumption of SF in Spain; (2) To explore the Spanish fashion market, considering its particular cultural and social nature; (3) To identify and portray the SF

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consumers and their purchasing process, drawing a comparison with the average consumer; and (4) To define the barriers and drivers for sustainable consumption, further contributing to the attitude-behaviour gap literature and providing guidance for practitioners and decision-makers.

2. Literature review

The mass production of fashion garments has existed since the mid-nineteen century; however, the advent of fast fashion in the 1970s and the globalisation and liberalisation of markets have disrupted the pace of both fashion production and consumption (Niinimäki et al., 2020). Thus, the fashion industry can be considered responsible for reinforcing some of the consumers' most damaging consumption practices by promoting, through its business models, overconsumption and waste (Buchel, Hebinck, Lavanga, & Loorbach, 2022).

2.1. Overconsumption and waste

Between 1996 and 2018, clothing prices in the EU dropped by over 30%, relative to inflation, which promoted increased consumption and reduced clothing life spans (European Environment Agency, 2019). According to a report of the European Environmental Agency (2015), between 1996 and 2015, the price of clothing increased by 3%, but consumer prices in general rose by about 60%. This meant that, relative to the EU consumer consumption basket of goods (as defined by the Consumer Price Index), clothing prices fell by 36%. Thus, since 2000, Europeans have increasingly purchased more clothing items but spent less money in doing so (European Environment Agency, 2019). As an example, despite an increase in the number of items owned, the average per person expenditure on clothing and footwear in the EU has decreased from 30% in the 1950s to 12% in 2009, and 5% in 2020 (Jackson & Shaw, 2008; Sajn, 2019). In 2017, European consumers bought 26 kg of textiles per person while discarding about 11 kg per person per year (European Environment Agency, 2019). Globally, trends are similar: Peters, Sandin, and Spark (2019) calculated that global per-capita textile production has increased from 5.9 kg to 13 kg per year over the period 1975–2018.

Low costs of production and low prices facilitated the culture of buying more and more frequently and wearing items for less time (Anguelov, 2015; Jackson & Shaw, 2008). In that sense, fast-fashion businesses stimulated a 'throw-away culture' (Cooper, 2005), devaluing the garments' worth. Variety and quantity prepend quality, making garments increasingly disposable. People nowadays tend to dispose of worn and torn items because buying new ones is more convenient than repairing them (Cooper, 2005; Goworek, Hiller, Fisher, Cooper, & Woodward, 2013; Laitala, 2014).

2.2. Sustainable fashion consumption

In contrast, sustainable products can be defined as products that yield environmental, societal, and economic benefits while protecting public health, welfare, and the environment over their entire commercial cycle (from the extraction of raw materials to final disposition), providing for the needs of future generations (Pencarelli, Ali Taha, Skerhákova, Valentiny, & Fedorko, 2020). Accordingly, Mohr, Webb, and Harris (2001) defined responsible consumption as the pattern of purchasing and consuming products that maximise long-term benefits and minimise hazardous effects on consumers and societies.

Growing consumer concern about sustainability issues has been reflected in a willingness to pay higher prices for products and services provided by companies involved in social and environmental activities (Johnstone & Tan, 2015; Szmigin, Carrigan, & McEachern, 2009). However, despite increased awareness and concern about SF, there has not been an evident correlation with sustainable consumption (Hassan, Shiu, & Shaw, 2016; Reimers, Magnuson, & Chao, 2016).

Thus, consumers have a positive attitude and increasingly care about unethical behaviour but, frequently, this attitude does not translate into action, which is known as the attitude-behaviour gap (Bianchi & Gonzalez, 2021; Blazquez, Henniger, Alexander, & Franquesa, 2020; Jacobs, Petersen, Horisch, & Battenfeld, 2018; McNeill & Moore, 2015; Riesgo, 2019; Wiederhold & Martinez, 2018). In the fashion context, researchers have termed this conundrum the Fashion Paradox (Black, 2008; Jacobs et al., 2018; McNeill & Moore, 2015).

The attitude-behaviour gap has been approached mainly through behavioural models, particularly, Ajzen's Theory of Reasoned Action (Ajzen & Fishbein, 1980; Fishbein & Ajzen, 1985) and the Theory of Planned Behaviour (Ajzen, 1991). These models, which served as the theoretical base for this research, argue that a person's behaviour can be explained through his/her intentions, the effect of social norms (perception of social pressure), and his/her perceived behavioural control.

Caught between their desire to behave ethically and their need to pursue belonging and self-esteem and achieve social acceptance, consumers are exposed to a variety of influencing factors, all of which contribute to the buying decision (Lundblad & Davies, 2016). Most research has pointed out that fashion price, or the binomial price-quality and/or price-style, are the leading variables guiding consumers' behaviour. For instance, Bianchi and Gonzalez (2021), Brandão and Costa (2021), Munir (2020), Diddi, Yan, Bloodhart, Bajtelsmit, and McShane (2019), Lundblad and Davies (2016), Karaosman, Alonso, Grijalvo, and Brun (2015) stressed that the perception (or reality) of high prices associated with SF products is the main deterrent against SF consumption. Furthermore, consumers claimed that SF products were less fashionable (e.g. Blazquez et al., 2020; Diddi et al., 2019).

Joy, Sherry, Venkatesh, Wang, and Chan (2012) found that while consumers expressed concern about the environmental and social impact of their non-fashion purchasing decisions, they did not apply such principles to their fashion consumption. Consumers talked about saving the environment in general terms, yet they routinely availed themselves of trend-led fashionable clothing that was cheap. Connell (2011) concluded that consumers considered SF as less stylish and less well-fitted than mainstream fashion. Likewise, Kang and Kim (2013) pointed to consumers' perception of SF not being stylish enough to enhance their personal image as a disabler of SF acquisition practices.

In summary, it seems that the majority of consumers make fashion purchase decisions based primarily on appearance/style, functionality, quality and price (e.g. Bianchi & Gonzalez, 2021; Connell, 2011; Goworek et al., 2013; Lundblad & Davies, 2016). Thus, consumers require SF to meet aesthetic and style requirements, and, in general, sustainability attributes are not considered and, if so, are not the leading factors.

2.3. Profiling the sustainable fashion consumers

Several studies have tried to identify the 'responsible' consumers in terms of sociodemographic characteristics. Thus, past studies have shown that, in general, women are found to be more involved in sustainability issues (Kopplin & Rösch, 2021; Niinimäki & Hassi, 2011; Roberts, 1996). Others have pointed out that the ethical consumer can be characterised by a relatively high income, education, and social status (Carrigan & Attalla, 2001; Roberts, 1996).

Within academia and industry nowadays, it is believed that the younger generations are the most engaged in sustainable issues. Researchers such as Kovacs (2021), Musova, Musa, Drugdova, Lazaroiu, and Alayasa (2021), Vatamanescu, Dabija, Gazzola, Cegarro-Navarro, and Buzzi (2021), Gazzola, Pavione, Pezzetti, and Grechi (2020), Pencarelli et al. (2020), and Kanchanapibul, Lacka, Wang, and Chan (2014) pointed out that younger consumers are paying growing attention to SF. Similarly, leading industry reports such as *The Pulse of the Fashion Industry* (Global Fashion Agenda, Boston Consulting Group & Sustainable Apparel Coalition, 2019) or *The State of Fashion* (The Business of Fashion and McKinsey & Company, 2019) profile younger consumers as the most engaged in SF consumption.

However, due to their lack of purchasing power, it is unclear to what extent young consumers are actually involved in SF consumption. Park and Lin (2020) explored the attitude-behaviour gap towards recycled and upcycled fashion products. They found that young respondents expressed the highest interest in ethical fashion but were the ones actually buying less of it. Similarly, Dhir, Sadiq, Talwar, Sakashita, and Kaur (2021) analysed the attitude-behaviour gap among Japanese consumers and found that women and older consumers displayed higher interest in SF.

Nonetheless, the consensus among researchers is that sociodemographics alone are weak predictors of SF consumption and inaccurate indicators to identify who SF consumers are. Thus, a further understanding of consumers' attitudinal attributes and purchasing decision-making is needed to profile this market segment.

2.4. The Spanish case

Lastly, our research focused on the Spanish consumers and the Spanish fashion market, which have their particular characteristics. According to the 2019 Economic Report of the Fashion Sector in Spain, the fashion industry contributes 2.8% of the Spanish GDP. It accounts for 4.1% of the Spanish labour market and 8.7% of its exports (Modaes.es et al., 2020). International fashion groups such as Inditex, Mango and Tendam have their headquarters and logistics facilities in the country; thus, fast-fashion brands dominate the Spanish fashion market. According to the Eurostat *Index of Prices for Clothing and Footwear* (2019), the Spanish market has one of the lowest prices' indexes in Europe (8.6% cheaper than the EU27 average, and only above UK, Hungary, Romania and Bulgaria). The combination of these factors may have contributed to a consumer culture of low prices and highly price-sensitive consumers.

Conversely, an IPSOS (2020) survey for the *World Economic Forum* highlighted that 76% of Spanish consumers had changed their everyday lives to fight against climate change. According to a survey conducted by *IBM* in 2020 in Spain, 81% of respondents claimed to be worried about textile waste, 68% considered SF as important (especially women under 50 years old with high household income), and 37% of the Spanish consumers declared to be willing to pay between 1% and 5% more for SF products. A SF market has also been flourishing in the latest years, with brands, such as *Ecoalf*, achieving international recognition, and a *Sustainable Fashion Week* being held annually in Madrid since February 2020.

Few academic studies looked at the attitude-behaviour gap among fashion consumers in Spain. In particular, Karaosman et al. (2015) and Blazquez et al. (2020) focused on fast fashion consumers' behaviour, highlighting in their results that there seems to be a general sentiment that the sustainable market is still underdeveloped in Spain. Thus, perceived lack of availability of SF seemed to be a contributing factor to the attitude-behaviour gap among Spanish consumers. The other two main contributing attributes were lack of interest and price. Consumers perceived SF as more expensive and, since the price is one (if not the one) of the most important criteria in purchasing decision-making, they would opt for cheaper options.

3. Methodology

Our research has followed a mixed-method approach: firstly, qualitative data was gathered through three focus groups (FGs) and then triangulated with a survey as a quantitative data collection method.

Table 1. Description of the sample.

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

Three FGs were held in Madrid (Spain) in July 2019. The FGs were structured as follows: group one (eight participants) and group two (nine participants) included fashion consumers who had never bought SF. The first and second groups were further divided by age: <30 years old and ≥ 30 years old. The third FG included consumers who usually buy SF. Specifically, six participants, ranging from 21 to 38 years old, were recruited via *Fashion Revolution Spain*, *Slow Fashion Next*, *Humana NGO Spain*, and the *Spanish Association of Sustainable Fashion* (AMSE). The data gathered from the FGs was transcribed and coded using NVivo 1.0 software. A content analysis was conducted following an inductive approach based on the model proposed by Mayring (2010), identifying themes, categories and subcategories, thus, giving structure to the data.

The quantitativef data collection took place in February 2020 through an online survey in *Google Forms*. The research sample consisted of Spanish consumers from 16 years old, from all Spanish regions in a balanced proportion, to ensure the research sample's relevance and representativeness. The final sample size was 1,063 respondents (see Table 1).

The survey questionnaire consisted of four sections: (1) Fashion Shopping habits; (2) Interests and involvement with SF; (3) Attitude-behaviour scales: Environmental Concern (EC), Subjective Norm (SN), Perceived Consumer Effectiveness (PCE), and Future Purchase Intentions (FPI) (to answer in a five-point Likert scale); (4) Sociodemographic data. Survey results were analysed through descriptive statistics. In addition, a Univariate Analysis of Variance was undertaken to evaluate to what extent sociodemographic variables – age, gender, education level, and income – influence each of the attitude-behaviour scales. The analysis was performed with the Full Factorial Model of the Univariate ANOVA using *R*.

4. Results

The survey's main results will be presented through descriptive statistics blending data from the focus groups when appropriate. The data will be shown contrasting the Average Consumer (AC) results with Sustainable Fashion Consumers (SFC).

4.1. Spanish consumers consumption habits and purchasing process

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

4.1.1. Preferred attributes and stores

In the decision-making process, both groups' most valued factors were fit (SFC: 4.53; AC: 4.57) and design (SFC: 4.20; AC: 4.05), as depicted in Figure 1. After fit and design, for the AC came price (4.04), quality (3.87), durability (3.53), easy to wash (3.07), and Made in Spain (2.69), being the least important factor 'produced with sustainable materials' (2.35). In contrast, for SFC, the list of priorities continued as follows: quality (4.18), durability (4.12), produced with sustainable materials (4.00), price (3.80), easy to wash (3.50), and Made in Spain (3.43); being the least important attribute 'from a prestigious brand' (2.09). Sustainable consumers valued high the composition of their garments: quality, durability, and made with sustainable materials, whereas for the average consumer, price stood out as a more important attribute in the decision-making process.

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

4.1.2. Fashion consciousness

Nam et al. (2007, p. 103) explained fashion consciousness as 'a person's degree of involvement with the styles or fashion of clothing'. An individual does not have to be either a fashion opinion leader or a fashion innovator to be considered fashion conscious. Fashion consciousness can be related to the interest an individual has in clothing and fashion and by their appearance (Gutman & Mills, 1982). The questions relate to fashion's cognitive, conative, and behavioural aspects, i.e. whether respondents perceive themselves to be fashionable, whether they are aware of/interested in fashion, and whether they are motivated to consume fashion. The fashion consciousness scale is divided into three subscales: (1) Overall interest for fashion, (2) Average monthly spending on fashion items, and (3) Frequency of buying.

SFC scored higher in all the four items Likert scale (see Figure 2), with an average of 3.4 against 3.0 for AC. Sustainable consumers liked fashion more, searched for fashion information and talked about it with family and friends. Regarding the monthly spending, SFC spent on average 38.5€ monthly, while AC spent 30.4€. It can be highlighted that 11% of SFC declared to spend more than 150€ per month. Finally, both groups of consumers preferred buying in-store rather than buying online and AC seemed to buy slightly more often than SFC.

In conclusion, SFC had a more significant fashion consciousness than AC. They were more likely to spend higher amounts of money while fashion buying and researching fashion brands and products. SFC were less price-sensitive, preferred style over trends, and were prone to do extensive research before buying. Their higher interest in fashion may explain why they were more aware of the fashion industry's current sustainability issues.

4.2. Understanding the Spanish sustainable fashion market

Firstly, the awareness of Spanish consumers of SF was examined: 90.03% of the sample declared had heard of SF; 73% claimed to be able to define with their own words what SF is; 74.32% professed to be interested in SF; 39.51% claimed to have bought at least once a SF item. When questioned about why they did not buy SF or why they did not do it more often, the most repeated answer was (see Figure 3): 'because I cannot discern when a brand is really sustainable or when it just claims to be it in order to improve its image' (47.60%), followed by 'because it is too expensive' (42.62%), and 'because it is not available where I live' (30.57%). Only 92 consumers, 8.65% of the sample, declared to buy SF regularly. Previous studies had pointed out price, lack of availability, and unappealing designs as barriers to buying SF; however, it seems that lack of credibility/trust in fashion brands is the main barrier for the Spanish consumers.

From the previous question about why they did not buy SF or why they did not do it more often, the consumers who answered 'I often buy sustainable fashion' were taken apart. This group was considered as the Sustainable Fashion Consumers (SFC), and their behaviour was analysed separately. Hence, for the already sustainable consumers (see Figure 4), the main reasons not to buy from SF brands were: because they prefer to buy

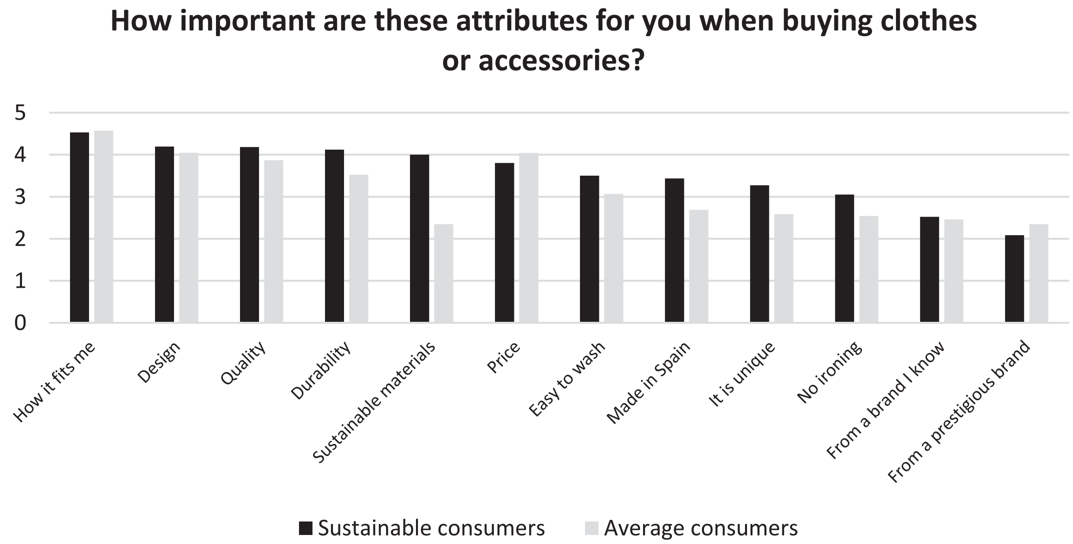

Figure 1. Comparison between sustainable and average consumers on the importance of a list of attributes while in process of buying clothes or accessories.

second-hand (14.1%), because they think it is too expensive (10.9%) and because they do not trust companies' sustainability claims (9.8%). It seems that the more aware consumers are of sustainability, the less they want to buy brand new items, i.e. more sustainable consumers tend to prefer buying second-hand than buying from sustainable brands. Mainly because when buying second-hand, they can overcome all of the other barriers they claim not to buy from SF brands: it is less expensive, there is a wide variety of styles – especially working appropriate attires – and qualities, and they can find clothes in their size.

Demographically, men and women within the group were balanced (when normalised to the overall sample population[2]); they were highly educated (67% completed a bachelor's degree or higher education), and mostly above 35 years old.

Regarding collaborative fashion consumption: 85.9% of SFC declared having bought second-hand apparel and 62% stated having sold clothes or accessories, whereas, among the AC, 63.1% had bought in the second-hand market and 43.8% had sold clothes or accessories. Renting was the least preferred option for both groups. Only 6.5% of respondents had at least once rented clothes or accessories. Thus, SFC were more willing to engage in collaborative fashion consumption, both by buying and selling, but it seems that they were not yet ready to renounce the products'

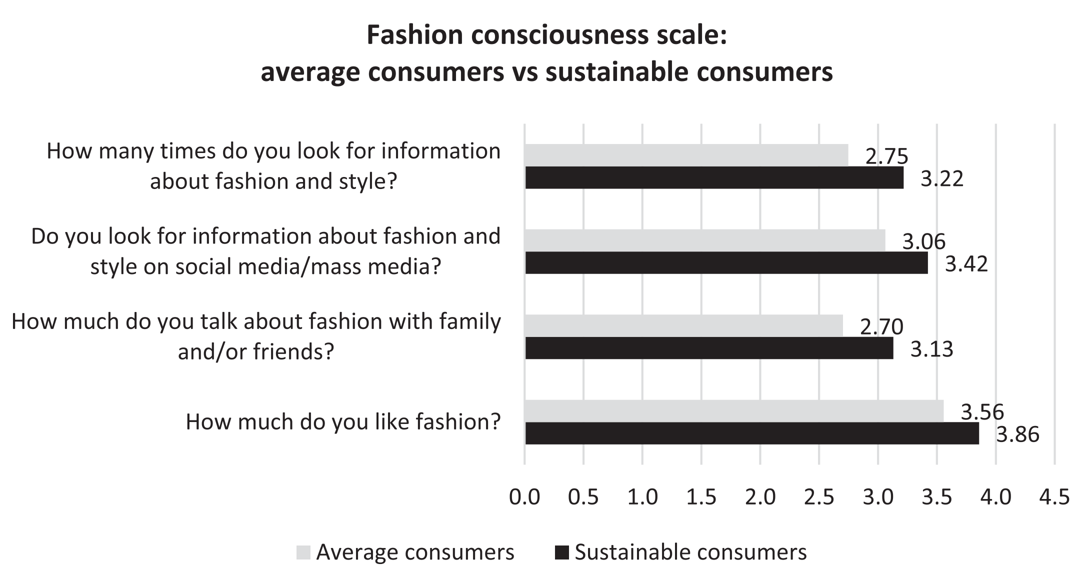

Figure 2. Fashion consciousness scale comparison between sustainable and average consumers.

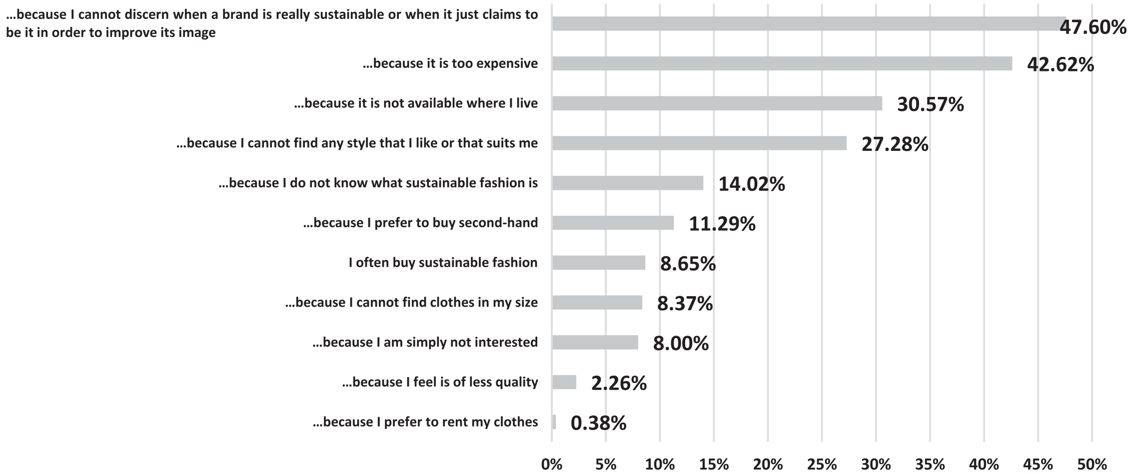

Figure 3. Frequency break-down of the answers from the question 'Why haven't you bought sustainable fashion, or you do not buy it more often?' for the overall dataset.

ownership. It can be because renting is still a fledgling business model, and it seems more convenient for special events than daily life.

4.3. Environmental concern, subjective norm, perceived consumer effectiveness, and future purchase intention

In this section, under the parameters of Theory of Planned Behaviour, it will be explored to what extent Spanish consumers are concerned about the environmental crisis (Environmental Concern Scale), to what extent they perceived social pressure to act sustainably (Subjective Norm), to what extent they believe that their individual actions can have an impact (Perceived Consumer Effectiveness), and, finally, if they are willing or not to buy SF in the future (Future Purchase Intentions Scale). Results are presented (see Table 2) comparing sustainable consumers (SFC) with the average consumer (AC).

4.3.1. Environmental concern

Environmental concern is generally conceptualised as the degree to which an individual is troubled about environmental vulnerability, the ecological repercussions, and the inadequate nature of actions taken to ensure environmental protection (Dunlap & Jones, 2002). The environmental concern scale comprises six items (Table 2). Sustainable consumers had a slightly more significant concern for the environment (SFC: 4.57; AC: 4.21) and were more willing to make sacrifices to protect it (SFC: 4.67; AC: 4.09). Overall, both groups seemed to have a high environmental concern, resulting from the increased coverage of environmental issues in recent years by mass media outlets.

4.3.2. Subjective norm

A broad definition of *subjective norm* is 'the perceived social pressure to perform or not to perform the behaviour' in question (Ajzen, 1991, p. 188). However, subjective norm is usually defined more precisely as an individual's perception or 'opinion about what important others believe the individual should do' (Finlay, Trafimow, & Jones, 1997, p. 2015), i.e. perform or not perform the behaviour in a specific situation. The subjective norm scale includes three items.

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

4.3.3. Perceived consumer effectiveness

Perceived Consumer Effectiveness is the degree to which consumers believe their behaviour effectively mitigates environmental impact and affects environmental problems. It is one of the attitudinal factors influencing consumers' commitment to pro-environmental behaviours (Roberts, 1996). Balderjahn's (1988) study determined that the more a consumer believes in individual consumers' power to affect environmental issues, the more she/he will engage in non-polluting consumer behaviour such as energy conservation and environmentally responsible purchasing and use of products.

Both sustainable consumers and the average consumer, as seen in Table 2, believed that their actions do

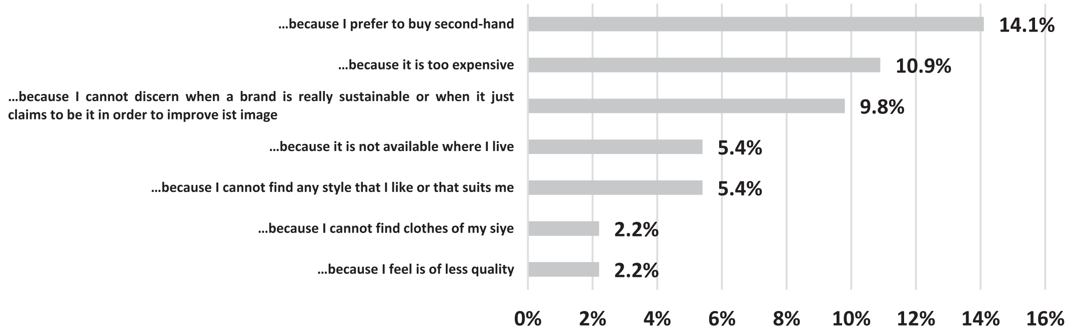

Figure 4. Frequency break-down of the answers from the question 'Why haven't you bought sustainable fashion, or you do not buy it more often?' for the sustainable consumers.

Table 2. Environmental Concern (EC), Subjective Norm (SN), Perceived Consumer Effectiveness (PCE), and Future Purchase Intentions (FPI): mean (std).

	Sustainable consumers	Average consumers
Environmental concern EC (Cronbach α = 0.795)	4.57 (0.93)	4.21 (1.00)
I am worried about the environment	4.65 (0.73)	4.13 (0.91)
The conditions of the environment influence the quality of my life	4.65 (0.72)	4.05 (1.06)
I am willing to make sacrifices to protect the environment	4.67 (0.70)	4.09 (0.95)
I think it is important to protect and preserve the Earth for future generations	4.80 (0.62)	4.50 (0.85)
I think that the environmental crisis is being exaggerated*	3.88 (1.52)	4.06 (1.22)
I believe sustainability is important	4.74 (0.68)	4.41 (0.86)
Subjective norm SN (Cronbach α = 0.695)	3.33 (1.39)	2.51 (1.30)
I think I have a moral obligation to buy clothes/accessories made sustainably	4.24 (1.03)	3.04 (1.23)
My family and friends expect me to buy more sustainable products	2.78 (1.36)	1.89 (1.10)
Society expects me to buy more sustainable products	2.96 (1.28)	2.59 (1.30)
Perceive Consumer Effectiveness PCE (Cronbach α = 0.756)	4.45 (1.01)	4.04 (1.13)
Unless everyone starts to change their consumption habits, it does not make sense for me to change mine*	4.35 (1.15)	4.07 (1.07)
The individual consumer can do nothing to reduce pollution*	4.33 (1.16)	3.99 (1.22)
Given that what a simple person does is not going to have any effect on pollution levels or natural resource scarcity problems, what I do will make no difference*	4.29 (1.22)	4.15 (1.10)
Each consumer's behaviour can have a positive impact on society	4.62 (0.75)	4.21 (1.05)
I believe that I can have a positive impact on the environment if I consume products that are sustainable	4.58 (0.76)	3.95 (1,12)
I believe that buying sustainable clothing can help combat environmental problems	4.53 (0.90)	3.85 (1.15)
Future purchase intentions FPI (Cronbach α = 0.873)	4.43 (0.91)	3.53 (1.21)
In the future, I will try to buy clothes produced sustainably	4.55 (0.78)	3.65 (1.15)
In the future, I will try to convince my family and friends to buy clothes produced sustainably	4.30 (1.01)	3.41 (1.25)

*Reverse-coded items.

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

4.3.4. Future purchase intentions scale

The Future Purchase Intentions Scale measured consumers' intentions to purchase sustainable apparel through a two-item scale adapted from Hyllegard, Yan, Ogle, and Lee (2012) survey. SFC clearly stated that they would continue to buy sustainable apparel and recommend it to their family and friends (4.43), whereas AC did not show the same level of commitment (3.53).

4.4. Influence of sociodemographic variables on environmental concern, subjective norm, perceived consumer effectiveness, and future purchase intention

Univariate Analysis of Variance is used to understand to what extent sociodemographic variables – age, gender, education level, and income – influenced the attitude-behaviour gap scales. Results are presented in Table 3.

The results show that education and gender had the greater impact on Environmental Concern and Perceived Consumer Effectiveness, since p values were under the threshold of 0.05. For Fashion Consciousness, gender had the greatest impact, followed by age and income, with education being not statistically

Table 3. Results of the full factorial model of univariate analysis of variance on the attitude-behaviour gap scales ($N = 1{,}063$).

	Environmental concern			
Variables	Type III Sum of Squares	Df	*F*-value	Sig.
GENDER	3.82	1	7.223	.007**
AGE	5.22	5	1.973	.080.
EDUCATION	15.21	6	4.791	.000***
INCOME	2.10	5	0.793	.555
Residuals	553.09	1045		
Fashion consciousness				
Variables	Type III Sum of Squares	df	*F*-value	Sig.
GENDER	35.78	1	27.326	.000***
AGE	21.79	5	3.329	.005**
EDUCATION	8.68	6	1.105	.357
INCOME	15.04	5	2.297	.043*
Residuals	1368.37	1045		
Perceived consumer effectiveness				
Variables	Type III Sum of Squares	df	*F*-value	Sig.
GENDER	15.55	1	21.261	.000***
AGE	7.69	5	2.104	.063.
EDUCATION	16.71	6	3.808	.000***
INCOME	2.39	5	0.653	.659
Residuals	764.28	1045		
Subjective norm				
Variables	Type III Sum of Squares	df	*F*-value	Sig.
GENDER	0.00	1	0.004	.947
AGE	36.91	5	6.767	.000***
EDUCATION	7.00	6	1.069	.379
INCOME	5.42	5	0.994	.420
Residuals	1139.90	1045		
Future purchase intention				
Variables	Type III Sum of Squares	df	*F*-value	Sig.
GENDER	26.23	1	20.125	.000***
AGE	15.54	5	2.386	.037*
EDUCATION	14.71	6	1.882	.081.
INCOME	7.50	5	1.150	.332
Residuals	1361.76	1045		

Signif. Codes: 0 '***' 0.001 '**' 0.01 '*' 0.05 '.' 0.1 '' 1.

significant. Subjective Norm was instead only impacted by age. Lastly, gender and age played the most significant role in Future Purchase Intention, followed by education and with income being not statistically relevant.

5. Discussion

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

Cowe and Williams (2000), in a UK study, showed that 30% of consumers intended to buy sustainable products, whereas only a small fraction of 3% actually purchased them. Similarly, Park and Lin (2020) in South Korea found that 35% of consumers had high purchasing intention but failed to translate it into actual behaviour. In the present research, 74.32% of respondents professed to be interested in SF; 39.51% claimed to have bought a SF item at least once, and only 8.65% declared to buy SF often. Hence, currently, it seems that consumers like the idea of sustainability, but not the market reality of it.

Sustainability seems to be the key purchasing driver for a relatively small portion of the sample (8.65% of consumers). SFC expressed a higher fashion consciousness, environmental concern, perceived subjective norm pressure, perceived consumer effectiveness, and future intention to buy and recommend SF than the average consumers.

Demographically, men and women within the group were balanced; they were highly educated and mostly above 35 years old. Whereas a number of research and reports (Gazzola et al., 2020; Kovacs, 2021; The Business of Fashion and McKinsey & Company, 2019 ; Musova et al., 2021; Pencarelli et al., 2020; Vatamanescu et al., 2021) tend to point out that the younger generations are the most interested in SF, it seems that, in the case of Spain, the middle-age/older generations are the ones actually buying it. Companies need to attract and retain their current customers and, at the same time, appeal to the next generations. It seems that the more sustainably aware consumers are, the less they tend to buy brand-new items. Sustainable consumers indicated neighbourhood stores and second-hand/vintage stores among their preferred shopping outlets, but non-sustainable brands were mentioned. Thus, it looks like the second-hand market and collaborative fashion, in general, are direct competitors to SF brands.

On the other hand, the average consumers prioritise fast-fashion brands when fashion buying. Essential attributes are fit, design, and then price. In fact, 'because it is expensive' was the second most selected barrier to buy SF. The average consumer appears to be very price-sensitive. Consumers who already buy SF are more aware of the real price clothing should have and perceive their fashion purchases as an investment. Older consumers recall saving money for several months over two decades ago to purchase a good quality garment, primarily due to its high price. That made the garment a valuable item for them, and they would have tried to repair it and preserve it for as long as possible. It appears that the low prices of fast fashion and its most recent evolution – the ultra-fast fashion – have contributed to devaluing the value of fashion garments and fashion itself for consumers.

The question then remains for companies on how to circumvent the price obstacle. More transparency and information on the product journey from raw materials to the final product are needed. This would probably help consumers appreciate more all the work that lies behind their clothes, thus, giving more value to their garments and probably increasing their willingness to pay for SF. Moreover, companies can invite consumers to think about prices in terms of Price Per Wear, turning their acquisitions into investments that, in the long term, could be cheaper than throw-away clothes.

Companies are increasingly reporting their sustainability actions; however, how they are disseminating their sustainability efforts seems to confuse consumers. 'I cannot discern when a brand is really sustainable or when it just claims to be it in order to improve its image' was the main reason respondents declared not to buy SF or not do it more often. There seems to be an increasing scepticism and cynicism towards sustainability claims. Unfortunately, practices like greenwashing (see Henninger, Alevizou, & Oates, 2016; Niinimäki, 2015), known as a marketing technique that uses sustainable credentials intending to improve a company's image and, therefore, increasing sales, but lacking actual sustainable actions, have contributed to consumer's lack of trust. Moreover, scandals, such as Boohoo's most recent allegations about worker exploitation by a supplier in the English town of Leicester (Cernansky, 2020), might have affected consumers' trust in brands and companies' sustainable claims.

6. Conclusions, limitations, and future research

Due to the increasing trend of SF, it becomes crucial for businesses to understand consumers' purchasing behaviour. This research has found that there is a market for SF; however, it is still a relatively small segment of the Spanish fashion market (8.65%). Sustainable consumers demonstrate greater fashion consciousness, environmental concern, perceived consumer effectiveness, and a higher subjective norm. However, the perception of 'pressure' to buy sustainably comes more from their moral values than from their inner circle or society overall, which may indicate that Spain still lacks a strong 'sustainable culture'. Therefore, individual moral values can be seen as an instrument of change.

It also appears that the more sustainably conscious consumers are, the less they buy brand-new, preferring alternatives such as second-hand (mainly) and renting. For the average consumer, price is still a critical purchasing driver. Respondents indicate that lack of trust in companies and their sustainable statements is the main reason preventing them from buying sustainable products or doing it more often. Thus, businesses should invest in palpable actions in order to be perceived as more transparent and trust-worthy.

Even though the present study provides valuable insights into understanding the determinants of the attitude-behaviour gap in SF, these findings should be interpreted in light of the following limitations. Since participation was voluntary, both the focus group and the survey sample were skewed towards women and younger participants; thus, the results should be interpreted with this in mind, and future research could integrate a more significant sample.

Future research could perform a similar analysis within other countries to determine to what extent culture influences SF consumption. The apparent lack of a 'strong sustainability culture' in Spain could be studied through the agenda-setting and framing theories, that is, a research of the volume of contents about SF displayed by (social) media and the framing of those contents.

Notes

1. In our research, clothing consumption refers to an individual's clothing acquisition decisions, use, and end of life. It encompasses acquiring, storing, using, maintaining, and discarding clothing products (Winakor, 1969).
2. The quantitative study sample was skewed towards women and younger respondents; therefore, each category's data was normalised. For example, there were 199 male respondents, and 16 of them declared to buy sustainable fashion; hence, 8% of men buy sustainable fashion. Whereas there were 864 female

respondents and 76 bought sustainable fashion often, therefore, 8.8% of women were sustainable fashion consumers. The exact process was followed with all the other demographic attributes.

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