PERCEPTIONS AND ATTITUDES OF GENERATION Z CONSUMERS TOWARDS SUSTAINABLE CLOTHING: MANAGERIAL IMPLICATIONS BASED ON A SUMMATIVE CONTENT ANALYSIS

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Abstract: Sustainability in the fashion industry has an importance in the global context; societies and fashion brands are taking measures to shift from non-renewable resource consumption and non-sustainable business models to a more circular economy that leads to sustainable consumption patterns. The younger members of Generation Z constitute an active and relevant fashion consumer segment with significant contributions; therefore, marketers must gain insight into the perceptions and attitudes of these young customers. The purpose of this paper is to explore the perceptions and attitudes of the younger members of Generation Z towards sustainable clothing in order to identify managerial implications and further academic research. The research was qualitative in nature, utilising semi-structured interviews and was accompanied by individual interviews with 120 active fashion shoppers aged between 18-25 years. The study examined the perceptions and sustainable fashion aspects with a positive attitude profile and the results indicate that health and environment-related values should be in focus to be more attractive for young customers. The decision-making barriers and positive keywords should be a base for effective communication strategies and marketing messages. The findings of the research show that, during their customer journey, young customers gather information mostly from the e-commerce retailer's product descriptions, product labels, filter systems, peer-reviews, and point of sales communication assets found at the point of sale. This exploratory study acts as the first stage of further quantitative academic research.

Keywords: sustainable clothing, generation Z, perceptions, attitudes, summative content analysis

Introduction

As a field of sustainable consumption, fashion marketing is becoming a more and more vibrant research area in business and academic research since it covers several issues from sustainability to technological change to fast-changing consumer needs. Gaining customer insight into sustainable fashion consumption plays a vital role for marketers in supporting sustainable development as the

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fashion industry and the fashion supply chain are the second-largest polluters in the world. In the textile sector, the increased level of consumption is mainly due to the growing number of global populations and the fast-changing and affordable fashion that results in an increasing amount of textile waste and other polluting materials related to production. The textile regulation included rules for labelling and marking of all textile products (ECS, 2011) which has clear effects on educating consumers and providing them with information on fashion products. Moreover, the EU lays down standards regulating the entirety of the fashion supply chain and manufacturing systems from raw materials to waste to landfill regulations. When the textile and fashion industry aims to promote sustainability, the key factors it tends to address are eco-materials, ethical issues related to manufacturing and transportation, ethical consumption, and recycling. At present, however, business models are mainly interested in achieving a large volume of sales and keeping up with the rapid changes in fashion. There are some trends in industrial development which have moved the fashion industry toward diminishing environmental impact: production, as well as consumption, have increased to levels where the benefits of technological development are reduced (EPRS, 2019). According to the charity Textile Reuse and International Development, concerns have been raised throughout an enquiry that the current 'fast fashion' business model is encouraging over-consumption and generating excessive amounts of waste (TRAID, 2019). The EU policies included in the circular economy package, adopted in 2018, will make the separate collection of textiles possible (Šajn, 2019).

It is clear that radical changes are needed across the whole supply chain to transform the fashion industry, not only in manufacturing and transportation but also in consumption; however, these changes seem to be slow in practice. In the last 15 years, the fashion industry has doubled its production, while the length of time clothing is worn before it is thrown away has fallen by around 40%. When clothes are thrown away, 73% will be burned or buried in a landfill. Only a minor portion – around 12% – is collected for recycling that will likely end up being shredded and used to stuff mattresses or made into insulation or cleaning cloths. Less than 1% of what is collected will be used for manufacturing new clothing; these trends are not only harming the environment but also limiting the opportunities for the fashion industry to succeed in the long term (WEF, 2019). The grades awarded by the Ethical Fashion Report, 2019 measure the efforts undertaken by leading companies to transform their supply chains, as well as to protect the environment from the irreversible impact of the fashion industry (Business and Human Rights Resource Centre, 2019). Moreover, the report highlights other issues as well, such as responsible purchasing practices, that encourage continuous improvement across the industry. For managers, understanding the principles of sustainable fashion is the core element to educate young customers and to drive them to more conscious purchasing decisions. This study examines what the term sustainable fashion means for young adults and explores their perceptions and attitudes towards the aspects of sustainable clothing

for managerial consideration. Fashion brands are developing new and innovative business models that converge with useful consumer insights to generate personalised and differentiated offers and to enable the development of end-to-end processes (McKinsey & Company, 2017). The key basis of business communication is qualitative insight, which examines the attitude-intention process to explore the most relevant and attractive product attributes and keywords related to sustainable consumption of apparel for businesses.

Literature review

Before defining what criteria should be used to determine sustainable fashion, one should acknowledge that the current literature uses multiple terms to describe the concept. The concept of sustainability, first defined in 1972 at a United Nations conference, conceptually encompasses three issues: (1) the interdependence of human beings and the natural environment; (2) the links between economic development, social development, and environmental protection; and (3) the need for a global vision and shared principles (UN, 2021). Over the years, the sustainability movement has come of age to reflect a sustained interest in many areas including organic, green, fair trade, and unfair business practices (Shen et al., 2013). The terms green fashion, eco-fashion, ethical fashion, and sustainable fashion are frequently used interchangeably to describe the same concept (Newholm and Shaw, 2007). Sustainable fashion can be defined as clothing that incorporates fair trade principles with sweatshop-free labour conditions; that does not harm the environment by using biodegradable and organic cotton and is designed for longer lifetime use; that is produced in an ethical manufacturing system, perhaps even locally; that causes little to no environmental impact and makes use of eco-labelled or recycled fabrics (Fletcher, 2014). A lack of understanding and comprehension of key green language terminology in management and academic literature in user-facing communications seems to be problematic for fashion brand marketers as the impact of their messages is often unclear and more likely to lead to user frustration, rather than engaged consumer decision making and action. Furthermore, there is emerging evidence that this approach is highly unlikely to promote knowledge, engagement, and action or to influence brand loyalty (Evans, 1989; Evans and Peirson-Smith, 2018). Ethical fashion, eco-fashion, and sustainable fashion—all these terms have become familiar within the media over the last few years. The above issues have moved from being a staple of niche fashion markets to centre stage for the consumer and high street giants (Fletcher, 2010). In academic literature, several exploratory studies emphasise the importance of predominantly examining the effects of sustainable consumption on the attitude and engagement level of young customers. Because of the low level of awareness and engagement, promoting sustainable consumption among young consumers should be a key priority (Armstrong et al., 2015; Cervellon and Wernerfelt, 2012; Henninger et al., 2016; Fischer et al., 2017). The urgent need to promote more sustainable consumption behaviours has been

prominently reaffirmed due to its inclusion among the Sustainable Development Goals (SDGs) of the post-2015 agenda compiled by the United Nations (2015), where it is featured as a distinct goal (SDG 12). The European Clothing Action Plan (ECAP) project (ECAP, 2019) summarises the European principles and goals, which include eight goals to enhance sustainable production and purchase decisions in the fashion market. The following aspects are considered to be vital for communicating with customers to promote awareness and sustainable purchase decisions. Engaging young consumers by focusing directly on educating 16- to 25-year-old consumers about how to use and dispose of their garments.

Concerning the transformation to sustainable fashion, the improvement of the whole supply chain is necessary, together with looking for opportunities to transform the sustainability of the underlying industrial system of which the individual processes form a part (Niinimäki and Hassi, 2011; Reeve, 2010; Sarkar and Sarkar, 2017). From a management point of view, the question of how consumers can be informed and motivated enough to reorient their consumption practices towards more sustainable goals is necessary (Jackson, 2005). Young consumers are considered a key target group by researchers, policymakers, and educators as it is deemed crucial to intervene in the formation and routinisation of mainstream unsustainable consumer lifestyles, practices, and patterns (Fischer et al., 2017). There is very limited research on examining young customers' attitudes towards sustainable fashion (Shen et al., 2013; McNeill and Moore, 2015; Fischer et al., 2017; Gupta et al., 2019); however, this segment is a relevant driving force in transforming fashion consumption patterns. Mukendi et al. conducted a systematic literature review from the first appearances of sustainable fashion in the management literature in 2000 up to papers published in June 2019, which resulted in 465 papers being included in their research. Their findings are characterised by a focus on consumer habits that can be shaped for the future and the importance of examining the younger generation's attitude and behaviour related to sustainable clothing. There are numerous terms used in the literature, which are used interchangeably: sustainable fashion, eco fashion, green fashion, and ethical fashion. In addition, some terms focus on a particular aspect of sustainable clothing: fair trade, environmentally conscious clothing, etc. There are various definitions for sustainable fashion established in the management literature; in this study, the consumer-focused approach of Reimers et al. (2016) is applied as a working definition: sustainable fashion consumption is associated with the environment and employee welfare. The fact that this definition conceptualises that ethical clothing has more dimensions, as also indicated in the management literature, reveals that academics have yet to empirically define ethical clothing based on the actual meaning consumers assign to it. Academic definitions typically accept the concept *a priori* based on their interpretation of its meaning for consumers, then measure consumer attitudes and purchase behaviour in the specific context of their research topics (Carrigan and Attalla 2001; Hustvedt and Bernard 2008; Reimers et al. 2016).

In marketing management literature, the importance of the symbolic properties of goods has been explored with specific reference to the perception of clothing by teenage consumers as this market segment plays a relevant role in sustainable fashion. A study by Koca and Koc (2016) explored a multitude of aspects in an individual's life that extend far beyond basic necessities. Their results suggest that conspicuous consumption is relevant for young people and that they are a group that is adept at reading the signals represented in clothing choices. Young adults use clothing as a means of self- expression and as a tool for assessing the people and situations they face (Piacentini and Mailer, 2004). Therefore, it is difficult to develop an association between fashion consumption as a symbolic act and environmental, as well as social values when the core element is self-expression, which is highlighted by the fact that a study by Muhammad and Ghulam (2019) determined style and self-expression to be the most relevant factors. The number of sustainable fashion purchasing decisions is reported to be low, together with awareness and preferences towards sustainable brands (Shen et al., 2013; Battaglia et al., 2014; Henninger et al., 2016). Understanding consumer behaviour is key to the impact that society has on the environment; moreover, marketers have a vital role in influencing customers to make more sustainable consumer decisions. The consumption of certain products and services has direct and indirect impacts on the environment, as well as on our personal (and collective) well-being (Jackson, 2005). However, there has been a reluctant uptake of sustainable fashion products by many consumers and a seeming conflict with existing preferences for 'fast fashion' in this area (McNeill and Moore, 2015).

After examining the product choices in an earlier study by Hartikka and Labat (2016), the results indicated that in the case of young customers, there was a relationship between avoiding health risk and preferring organic materials when making decisions. The findings suggest that consumer beliefs about ethical fashion, which are based on their perceptions of a company arising from its reputation in the fashion industry, influence their support for what they perceive as socially and environmentally responsible businesses (Shen et al., 2012). Furthermore, the findings of Joergens (2006) serve as evidence for ethical issues having an effect on consumers' fashion purchasing behaviour in addition to the environmental aspects. Marketers and manufacturers are recommended to examine and collect insight on the perceptions and attitudes of young customers in regard to key sustainable product attributes in order to develop effective communication tools.

When it comes to fashion purchases, consumers are primarily motivated by personal needs when buying garments, which take precedence over ethical issues. Another factor, the usage of clothing items has the largest environmental footprint in the lifecycle of clothes, owing to the water, energy, and chemicals (primarily detergents) used in washing, tumble drying, and ironing, as well as the microplastics shedding into water (EPRS, 2019). The aspects related to fashion consumption are considered to be numerous and highly depend on the information available on the environmental impact of apparel products. In order to identify

when a specific company appears more attractive to young consumer segments which are receptive of communication regarding sustainable aspects, proper and thorough research is needed to explore the thoughts of and relevant keywords for managers.

The aim of the study and research questions

The main purpose of this research is twofold. (1) To understand and identify the perceptions, attitudes, and experiences towards sustainable clothing and the aspects of sustainable fashion consumption for managerial consideration and further academic research. (2) To explore the barriers and opportunities associated with the communication of sustainable brands and marketers involved in the fashion supply chain for establishing more effective marketing strategies.

During the investigation performed based on theoretical knowledge and earlier international research, the following research questions were formulated, which are related to the areas that determined the subject of the research and later the directions of analysis:

-What are the perceptions of generation Z fashion consumers regarding the aspects of sustainable clothing?

-What are generation Z fashion consumers' attitudes towards the main aspects of sustainable clothing?

-What are the positive keywords related to sustainable garments which can be effective in marketing strategies?

The logical process of the research

Collecting literature and secondary research findings

Literature review and summary of previous findings on sustainable fashion consumption

Formulation of research questions

Data collection and elaboration

Evaluation of results

Materials and methods

In line with the aim of the research, this paper is exploratory, qualitative in nature, and presents the results of a study that used semi-structured personal interviews to explore the perceptions and attitudes towards sustainable fashion consumption. The sampling strategy was based on a combination of purposeful sampling and snowball sampling methods, limited to consumers involved with fashion. The sampling strategy employed was designed to obtain a sample based on the following criteria. The first criterion was the demographic status of the respondents. The second criterion was that the respondents had to be active in fashion consumption, buying fashion products regularly, at least once a month. The third criterion was the existence of a personal budget exists for purchasing clothes. The participants were recruited using the snowball sampling method. The number of interviews was 122, which included 61 male and 61 female respondents. The interview data were generated using a semi-structured interview protocol. The

datasets were analysed utilising a content analysis method where the context, the phrases, and the words were examined, familiarisation and conceptualisation being the focus of the content coding. The coding and quantification were based on the principles of sustainable clothing. We examined the themes, patterns, and categories that emerged in the interviews.

The duration of the interviews was 40–70 minutes each. A guide was used to encourage the exploration of certain topics. The questions aimed to gain insight into the following research topics: 1. Fashion consumption behaviour. 2. Awareness and perceptions of young adults regarding sustainable clothing. 3. Attitudes towards sustainable clothing. 4. Decision-making while shopping. The sample size and the key criteria used for the selection of the sample do not allow the paper to make generalised statements and the sample was not representative of the young Hungarian population. Although these limitations are a result of the methodology applied, the findings can serve as an appropriate basis for and encourage quantitative research on a representative sample, which can be the direction of further research.

The data analytics process started with the analysis of the raw data obtained from verbatim transcriptions of the interviews, based on which categories and themes were established. We reviewed the themes, patterns, and categories that emerged naturally from the data. Categories and subcategories were coded to make them measurable. The application of the summative content analysis approach began with the identification and quantification of approaches to sustainable fashion, as well as the positive and negative keywords related to the categories and subcategories. During the process of further abstraction of the data, content analysis was performed in order to quantify the frequencies of specific keywords.

The first limitation of this research that should be noted is its sample size. However, this sample size still provided an opportunity to explore what the individual target groups mean by sustainable fashion, and what the perceptions and attitudes are towards sustainable clothing. The second limitation is that the sample is not a 'true' representation of the population rather a strategically selected group. Although these limitations cannot be neglected, as the current study is explorative, we feel that the findings still facilitate engaging discussion, which can be followed up with further research.

Results and discussion

The overall objective of the qualitative study was to gain deep insight into and understanding of young people's awareness, perceptions, and attitudes towards sustainable clothing. In addition, the importance of fashion and consumer behaviour, as well as the aspects triggering cloth purchasing, were in focus. During the qualitative semi-structured interviews, respondents were asked about research topics, which are mentioned in the next section of the paper. The data was analysed using summative content analysis with respect to consumer behaviour, the perceptions towards the aspects of sustainable clothing, and the attitudes towards

sustainable consumption and apparel product attributes. In the case of the managerial implications, the results are presented using quotes and frequency figures.

Consumption behaviour

In order to categorise the respondents based on their level of involvement in fashion, respondents were asked about their fashion consumption behaviour and attitude towards fashion, which was used as the basis of segmentation. The young adults in the sample all had a monthly budget which they could spend on apparel products at least in part and they were all regular consumers. Among the motivations of purchase, the intrinsic motivators, such as the need for keeping up with change and fashion trends, were usually brought up first, followed by the need for renewing an existing wardrobe ('something new to refresh my wardrobe'). Only around five per cent of respondents indicated that they purchased new items mostly when it was necessary for them. On the other hand, the goal was self-expression for more than ninety per cent of the sample and therefore more than 30 per cent of the respondents regularly purchased impulsively ('hunting for something new'). In the sample, monthly purchasing was the most frequent answer to the question about how often they make purchases, and in parallel, the respondents stated that they buy a few new pieces in every season. Roughly ten per cent of the women in the sample searched for new items to buy every day or several times per week. They used several digital channels: Google image search and following brands on social media channels. The respondents who bought clothes less frequently compared to the others were mostly the ones with a lower budget and mostly used fewer channels, two to three on average, for finding information. In the most fashion-intensive segment, 32 respondents used more than five applications and followed more than five brands regularly. They all followed fast fashion brands; only 10 per cent of the respondents followed designer brands. They tended to receive some money to spend on different occasions and they usually spent their this on cosmetics and clothes.

The most typical channel of purchase was shopping centres, while only 30 per cent of the respondents used online channels for purchasing clothes. A global ratio of younger consumers is 40 per cent according to a study by McKinsey & Company, 2020. According to the result of this research, the largest group of online shoppers was made up of women purchasing sportswear while purchasing second-hand clothes had the lowest prevalence. The respondents rarely purchased clothes in hypermarkets and small shops. Only 5 per cent of the women mentioned charity shops and second-hand shops as a channel of purchase. Men did not report purchasing used fashion products at all. The main motivation to buy clothes in second-hand shops was to find 'unique blouses', 'expensive bags' and accessories. In terms of brand awareness, young adults mentioned ten to fifteen favourite brands on average, but some outlier respondents had more than twenty favourite fashion brands they regularly reported buying from. They preferred brands that were affordable to them and could be found in shopping centres. More than two-

thirds of the respondents reported that their purchasing decisions were firmly based on fashion, social considerations, or personal pleasure. These items were associated with the expressions: 'intuitive' and 'I'll be better off'. If buying expensive or special clothes, they tended to wait for sales or seasonal clearance days.

The findings indicated that the sustainable consumption behaviour of young consumers was influenced by factors such as peer pressure, environmental knowledge, and involvement in fashion. Similarly to the results of Anuar et al. (2020), our findings demonstrated that factors such as peer pressure, environmental impact, and environmental knowledge significantly influence sustainable consumption behaviour. As the influence of peers emerged as the most significant determinant of green and sustainable consumption behaviour, managers should support and enable communication regarding sustainable values with young consumers.

The perceptions towards the aspects of sustainable clothing
As the perceptions affect consumption behaviour through shaping the decision-making process, insights on perceptions are vital for managerial decisions. Concerning the perceptions towards sustainable clothing, we examined the top-of-mind answers of each respondent during the research process. For structured insight, the essences of the different answers were determined and categorised into five main categories. The most typical answer categories were environmentally responsible production and fabric usage, reused fabrics, and cruelty-free production ('companies don't exploit people, don't use child labour'). The fourth aspect was buying clothes which are made of organic cotton. The fifth most frequently mentioned factor was local production and supporting domestic brands. (See Figure 1.)

environmentally friendly ■ cruelty free ■ organic
reused fabrics ■ local production

Figure 1: Top-of-mind awareness of sustainable fashion
Source: own research

Related to waste reduction, only a minor portion, less than five per cent of the respondents, mentioned frugal purchasing patterns, 'purchasing only necessary garments'. During the interviews, the respondents could not recall any situations when they made altruistic or ethical decisions by avoiding buying unnecessary fashion products and this situation is a bad sign for sustainability. 'Buying less doesn't mean sustainability' from their point of view; more than 90 per cent of the respondents associated frugal consumption with negative feelings such as 'poverty' and 'not following the fashion trends'. Thinking beyond frugal consumption in connection with sustainability, only two interviewees mentioned energy and transportation considerations in relation to clothes; however, they still reported that these would not affect their decisions in purchasing situations. With a focus on frugal fashion consumption, ten per cent of the respondents agreed with the idea, but mentioned that 'it is not likely that people care about that'. Only two respondents reported redesigning, reusing, and upcycling old garments from friends and family. Respondents reported that only between 20 and 50 per cent of their clothes see regular use, which implies a high level of overconsumption.

They generally assumed 'sustainable brands' to be expensive and associated sustainable brands with 'luxury and unique clothes' which is 'out of reach for everyday people'. When asking about their experiences and the exact price of their clothes, the results showed that the participants who mentioned the high costs of buying ethical clothing had no experience in buying 'sustainable brands'. They had a strong perception of the price and quality of these brands. The most frequent keywords associated with sustainable materials were organic cotton, natural dyes, longevity, and reusability in the case of more than 70 per cent of the respondents. More than 80 per cent of the research participants mentioned environmentally friendly fabrics and chemicals in connection with health and sustainability, such as organic cotton, bamboo, or wool.

Outstanding mentions on functional, emotional, and environmental benefits were most frequently cited by the interviewees, primarily contributing to a positive perception of sustainability. Cruelty-free, environmentally conscious and friendly manufacturing, organic materials, reused fabrics, and local production were the most relevant factors perceived to support sustainable fashion.

For manufacturers, the associated emotional factors, self-expression, and personal style seem to be more important emotional values than the sustainable reasons, yet sustainable product attributes emerged in the answers of young customers as added values.

Attitudes towards sustainable clothing
The findings regarding the perceptions of the different aspects of sustainable clothing are presented in accordance with the priorities of the European Clothing Action Plan – ECAP (2019). The analysis is based on the following topics of the ECAP: sustainable fibres and fabrics, integrating recycled fibres, manufacturing practices, waste reduction, and disposing of garments in a more sustainable manner. Ethical working conditions were highlighted by the respondents as one of

the most relevant criteria of sustainable manufacturing; therefore, it was also a factor we analysed. Sustainable fabrics or ecologically friendly fabric had a positive meaning to them, yet respondents had limited information on sustainable fabrics. Organic cotton and wool were the fabrics considered to be less harmful to the environment and the participants had a highly positive attitude towards natural fabrics. Material has a crucial influence on consumption patterns behind brand and style. Attitudes were highly positive towards natural and organic fabrics and they were mostly associated with health consequences. Most accounts of attitudes towards sustainable fabrics were more concerned with the longevity of the cloth fabrics. In terms of avoiding purchasing mixed-fabric garments, which is a hot topic in sustainable clothing, there was no mention of any preference for pure non-mixed fabrics, and this factor was not associated with economically conscious behaviour. Labelling seems to be a key factor as more than eighty per cent of the respondents reported regularly reading the labels when buying a new garment. They were able to recall labelling examples such as 'organic label', 'information on donating', 'reduced CO_2 emissions'. Around twenty per cent of the respondents mentioned fair trade cotton or eco-labelled materials as an important factor when purchasing. The guide included a key question for exploring if the respondents were aware of certifications and labelling of apparel products. Young customers emphasised the importance of informing customers through labelling on garments. Product labels and tags seem to be reliable differentiators while brand communication activities related to sustainable values are controversial due to being perceived as brand messaging and 'advertising' by young consumers. In terms of online shopping, they emphasised the importance of filtering and the possibility of selecting sustainable products and products made of reused fabrics. More than ninety per cent of the respondents had a positive attitude towards sustainable selections and limited-edition clothes which are environmentally friendly. Reimers et al. (2016) examined the significant effect of perceived consumer effectiveness on consumers' attitudes towards reusable fabrics such as in these findings and identified a positive attitude towards reused and recycled materials, similarly to our research.

Integrating recycled fibres, recycled and reused fabrics were associated with the terms 'poverty and plastic-like' mostly by young women. We examined the consumers' views on circular garments and found that there were positive attitudes toward recycled materials but less than 20 per cent of the respondents reported that they mostly collect clothes separately for reuse or donation. More than 80 per cent of the respondents had a positive attitude towards recycling textile waste to produce new clothes.

An important result of this research for marketers is that labelling and the filter systems in e-commerce are key opportunities to educate and engage young consumers. Moorhouse and Moorhouse (2017) examined the competitive advantage of reused materials and found eco-collections and limited sustainable collections having a positive impact on consumers' attitude towards and acceptance

of a brand. Park and Lin (2020) also reported positioning apparel products through recycled materials being important for engaging consumers.

Respondents had a negative attitude towards second-hand clothes due to them having been 'used by other people' and they associated the shopping experience with negative emotional factors. Respondents did not report having a similar negative attitude towards C2C online auctions and online second-hand shops. In general, buying clothes in second-hand shops is not popular; most of the respondents felt uncomfortable and 'did not like to rummage through clothes'. There was only one woman who answered that she liked buying at charity shops because 'I can support others with it'. The impact of purchasing second-hand clothes and causing less environmental impact was not clear to them. 'I don't like clothes that were worn by someone else' and 'I just buy new clothes because it feels good to wear a dress for the first time' were typical answers. Sometimes, a negative attitude was observed towards thrift stores: 'people in school hate on me for buying from a thrift store but I get really good quality stuff from there. Fast fashion brands just don't suit me.' Only three respondents had positive memories and attitudes with 'hunting for unique pieces'. On the other hand, in some cases, an emotional connection was seen between the clothes and the owners: 'I appreciate it when clothes are handed down between friends because these clothes remind me of them' or 'I'm happy to accept clothes from friends or family because then I can get clothes that I couldn't buy by myself'. The aspects of reusing clothes were explained by interviewees in the context of donating and sharing clothes with others. While working through the questions related to frugal consumption, the results of the research showed that there are some specific items that young respondents tend to swap or share. Sharing with friends or close family is rare but respondents recalled highly positive emotional memories in connection with this practice. Ethical working conditions and fair-trade labelling were mentioned in relation to the social aspect of sustainable consumption, similarly to the findings of Fletcher (2014). On the other hand, no other aspects were recalled by the respondents. Examining the disposal practices of the interviewees, they reported frequently donating clothes to close friends or to charity shops; however, recollection campaigns were not mentioned. There is a significant difference in clothing disposal practices by gender; more than 50 per cent of the female interviewees were able to mention more than five charity shops or organisations, which collect used clothes for people in need but only 20 per cent of the male respondents were able to do the same. Young women mostly reported reusing clothes for cleaning or sewing and patchwork. They usually sort out clothes regularly and tend to throw the clothes away when they are 'patched and it is impossible to wear them anymore'. Taking garments to a recycling container is the third most frequent way of disposal by young women but only two men reported using this way of disposal. Longevity, washing, and drying instructions are not perceived to related to sustainability by the young generations, even though washing and drying make a large contribution to the environmental impact of

clothes. Transparency of the production process, the usage of digital communication channels should be widely adopted in marketing campaigns. These results are very similar to the findings of earlier studies by Vehmas et al. (2018) and Connell and Kozar (2014). The respondents reported positive intentions associated with purchasing sustainable apparel products when they were asked about the barriers and opportunities. The most frequently mentioned keywords are shown in Table 1.

Table 1. Categories and subcategories interpreted with negative and positive keywords derived from apparel product purchasing

Categories	Subcategories	Barriers/negative keywords	Positive keywords
Fabrics	natural fabrics (cotton and wool) organic fabrics sustainable fibres and fabrics recycled fibres, reusable reused natural colouration	price, recycled fabrics – artificial unclear labelling	natural healthy affordable status reusable attractiveness
Manufacturing practices	CO_2 reduction water usage reduction less packaging ethical working conditions	lack of a filter lack of labels	social acceptance nature save the environment save the planet common future
Frugal consumption, waste reduction	sharing swap events	poverty crowd time-consuming too many products	finding treasure family unique longevity memories creativity
Disposal	donation recycle	physical discomfort – extra effort lack of information on possibilities	help happiness community share something with others in need

Source: own research

The attitude frequencies of the four most frequented categories of sustainable fashion consumption, based on ECAP, are organised into three attitude categories: positive, neutral, and negative (see Figure 2.). According to the results of the survey, disposal of garments and production practices have the most positive meaning, while the usage and integration of recycled fibres are the most controversial. Generation Z consumers collect information mostly at the point of sale; therefore, labelling and point-of-sale communication assets are the most effective channels for providing information.
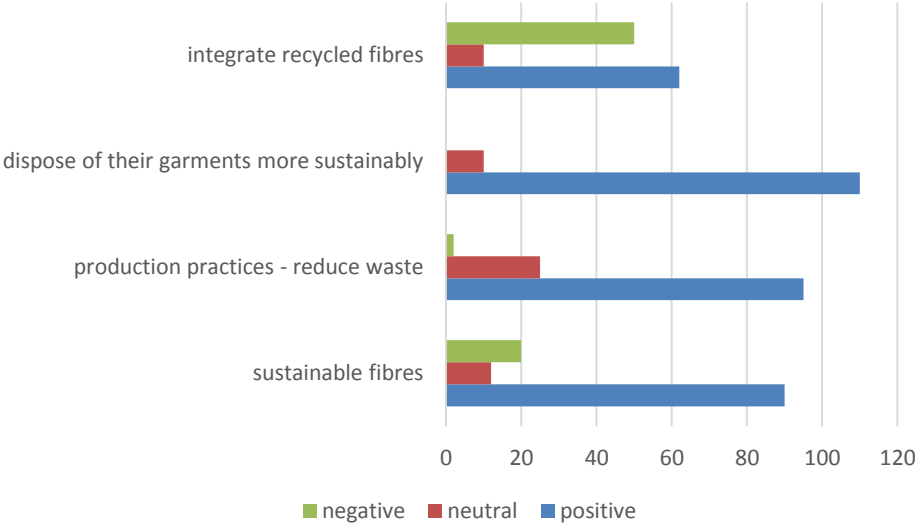

Figure 2: The frequency of attitudes concerning the four aspects of sustainable consumption based on the ECAP 2019

In marketing communication, the effective marketing messages should fall into one of the mentioned attitude categories and use the positive keywords mentioned in Table 1. The results are in line with the earlier results of Ka-Leung Moon et al. (2015), Wiese et al. (2012), Jang et al. (2012), Garcia-Torres et al. (2017), who also reported the environmental aspect of sustainable fashion consumption having the most positive effect in marketing communication, as this is the aspect which carried the most positive meaning for young customers. The findings also reveal that social aspects are associated with low awareness and offer much less information in terms of current communication.

Managerial implications

The sustainable fashion consumption of young adults is a complex issue. It is crucial to ensure that young customers practice and understand perceptions and

attitudes. The aim of this study was to augment our understanding of generation Z consumers through qualitative insight.

Although an increase in sustainable fashion consumption behaviour constitutes a noticeable trend for future consumption in line with the sustainable development goals, not nearly all aspects were found to be interpreted in a positive context when examining the attitudes towards them. Interviewees reported awareness and involvement in some aspects of purchasing sustainable products: environmentally friendly fabrics, cruelty-free production, ethical working conditions, and local production. All the former aspects have positive meaning for young customers and they reported positive intentions when purchasing apparel products associated with the messages explored.

Based on the findings of this study, managers need to take the listed barriers and positive keywords into consideration since the above can be a valuable input for defining effective marketing messages. Moreover, according to these findings, the most effective channel of communication is point of sales messaging: labelling and point-of-sale displays can provide an opportunity for young consumers to identify sustainable clothes. The influence of online communication on young consumers' perceptions and attitudes towards sustainable clothing seems effective when communicating added value through online product labelling. The availability of 'sustainable' filters on e-commerce sites, customer feedback, comments, and product ratings are of utmost importance when attempting to create demand for sustainable apparel products.

In conclusion, the findings of the research assert that revealing and measuring consumer perceptions and attitudes should be dealt with using a holistic approach. Effective marketing communication should also involve added product values related to sustainability and ethical production aspects. Understanding all aspects of barriers and positive keywords can help marketing managers build effective strategies.

Conclusion and recommendations

Over the past decade, the managerial and academic research of environmentally and socially consequential consumption has benefited from insights from the conscious consumption theories. This research has contributed to a shift in the focus of marketing managers to the perceptions and attitudes of individual young consumers in order to utilise effective marketing messages. According to the findings of this research, young customers demand more and more information on sustainability, with environmentally friendly and organic fabrics, cruelty-free manufacturing processes, reused fabrics, and local production being the most highlighted aspects of sustainable consumption; therefore, these aspects of sustainable fashion are vital to communicate towards young customers. The results also highlighted a lack of awareness of certain critical factors as frugal consumption and the importance of conscious disposal, and the circumstances of production are not considered by young adults to be related to sustainable fashion

consumption. In comparison with earlier international findings, the findings of this exploratory research are similar in terms of the most relevant aspects of sustainable fashion consumption for young adults. As for the managerial implications, the findings of the research are relevant due to them exploring key barriers and positive keywords for the customers, as well as the attitude towards sustainable fashion aspects. Sustainable fashion products are assumed to be more expensive and luxurious than the respondents can usually afford; therefore, educating their consumers about product values and some commonalities in price and environmentally friendly alternatives should be core elements of the messages used by fashion brands. There seems to be a positive attitude towards circular clothing, mostly recycled and reusable materials. For building effective strategies, it seems relevant to employ emotional hooks for circular fashion products and it would be highly advantageous to create opportunities for collecting used clothes in brick-and-mortar shops or through delivery. Fashion companies and brands can take advantage of identifying the most effective channel of communication which is a point of sale communication according to the results: labelling and point-of-sale assets and campaigns can provide an opportunity for young customers to identify certain apparel products as sustainable. The influence of online communication on the perceptions and attitudes of young consumers in regard to sustainable clothing seems effective in communicating added value through online labelling, filter availability on e-commerce sites, and customer feedback.

The managerial aspects of the study provide information on awareness factors, the attitude towards sustainable consumption, and the effective communication channels and messages applicable to generation Z customers. Understanding all aspects of perceptions and attitudes can help marketing managers build more effective strategies and campaigns with respect to their sustainable products and product lines. Concerning further academic research, the findings can serve as a basis for further research.

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PERCEPCJA I POSTAWY KONSUMENTÓW POKOLENIA Z WOBEC ZRÓWNOWAŻONEJ ODZIEŻY: IMPLIKACJE MENEDŻERSKIE W OPARCIU O SUMMATYCZNĄ ANALIZĘ TREŚCI

Streszczenie: Zrównoważony rozwój w branży modowej ma znaczenie w kontekście globalnym; Społeczeństwa i marki modowe podejmują działania mające na celu przejście od konsumpcji zasobów nieodnawialnych i niezrównoważonych modeli biznesowych do gospodarki o bardziej zamkniętym obiegu, która prowadzi do zrównoważonych wzorców konsumpcji. Młodsi członkowie pokolenia Z stanowią aktywny i istotny segment konsumentów modowych o znaczącym udziale; Dlatego marketerzy muszą uzyskać wgląd w postrzeganie i postawy tych młodych klientów. Celem tego artykułu jest zbadanie postrzegania i nastawienia młodszych członków pokolenia Z do zrównoważonej odzieży w celu zidentyfikowania implikacji menedżerskich i dalszych badań naukowych. Badanie miało charakter jakościowy, wykorzystując wywiady częściowo ustrukturyzowane i towarzyszyły mu wywiady indywidualne ze 120 aktywnymi kupującymi modę w wieku 18-25 lat. W badaniu przeanalizowano postrzeganie i aspekty zrównoważonej mody z pozytywnym nastawieniem, a wyniki wskazują, że wartości związane ze zdrowiem i środowiskiem powinny być w centrum uwagi, aby były bardziej atrakcyjne dla młodych klientów. Bariery decyzyjne i pozytywne słowa kluczowe powinny być podstawą skutecznych strategii komunikacyjnych i przekazów marketingowych. Wyniki badania

pokazują, że podczas podróży klienta młodzi klienci zbierają informacje głównie z opisów produktów sprzedawców e-commerce, etykiet produktów, systemów filtrów, recenzji partnerskich i zasobów komunikacyjnych w punkcie sprzedaży, które można znaleźć w punkcie sprzedaży. To badanie eksploracyjne stanowi pierwszy etap dalszych ilościowych badań naukowych.

Słowa kluczowe: odzież zrównoważona, pokolenie Z, spostrzeżenia, postawy, sumatywna analiza treści

Z代消费者对可持续服装的看法和态度：基于累加成分分析的管理含义

摘要：在全球范围内，时装业的可持续发展至关重要。社会和时尚品牌正在采取措施，从不可再生的资源消耗和不可持续的商业模式转变为更循环的经济，从而导致可持续的消费模式。Z世代的年轻成员构成了活跃且相关的时尚消费者领域，并做出了巨大贡献；因此，营销人员必须深入了解这些年轻客户的看法和态度。本文的目的是探索Z世代年轻成员对可持续服装的看法和态度，以便确定管理意义和进一步的学术研究。这项研究本质上是定性的，采用半结构化访谈，并与120位年龄在18-25岁之间的活跃时尚购物者进行了个人访谈。该研究以积极的态度对感知和可持续时尚方面进行了调查，结果表明，健康和环境相关的价值应作为重点，以便对年轻顾客更具吸引力。决策壁垒和积极的关键词应该成为有效沟通策略和营销信息的基础。研究结果表明，年轻客户在其客户旅程中主要从电子商务零售商的产品说明，产品标签，过滤器系统，同行评审以及在销售点发现的销售点通信资产中收集信息。这项探索性研究是进一步进行定量学术研究的第一阶段。

关键字：可持续服装，Z代，感知，态度，总结性内容分析