Will 'Eco-Fashion' Take Off? A Survey of Potential Customers of Organic Cotton Clothes in London*

¿La eco-moda despegará?
Encuesta a clientes potenciales de ropa de algodón orgánico en Londres

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Abstract

This paper shows the results of a research that defines potential customers for organic cotton clothing in London in relation to their organic produce consumption. The methodology employed a positivistic approach and a combination of exploratory and descriptive research. It included a qualitative exploratory phase of seven in-depth interviews and a quantitative conclusive descriptive phase of 100 face-to-face applied questionnaires.

The study suggests that most responders present positive attitudes towards organic cotton fashion. There is no evidence among the responders of a direct relation between consuming organic produce and the willingness to purchase organic clothing. However, interviewees with a higher degree of organic food consumption do exhibit higher knowledge about organic clothing, higher aspirations to enhance their quality of life and a stronger desire for hazardous chemical residue-free materials; they, as well, place a lower importance on the organic clothing premium price. The interest in environmental protection is also a characteristic of these potential customers; nevertheless, it is not necessarily related to higher organic food intakes. As with organic food, motivations for buying organic clothing are mainly related to specific characteristics of the product that directly benefit the consumer.

Results have to be interpreted in light of what other studies, such as that by Carrigan *et al.* (2001), have revealed regarding purchase behaviour, which often remains unaffected by ethical concerns even though consumers may express willingness to purchase ethically.

This research can be useful for marketers who want to better understand consumers with higher willingness to buy organic clothing. No studies existed at the time of the study that related the value that consumers give to the attributes of organic cotton clothing and their organic food intake.

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Keywords

Fashion, organic cotton, potential customers, clothing, organic food, attitudes.

Resumen

Este artículo muestra los resultados de una investigación que define compradores potenciales de prendas de vestir de algodón orgánico en Londres en relación a su consumo de comida orgánica. La metodología utilizó un enfoque positivista y una combinación de investigación exploratoria y descriptiva. Incluyó una etapa cualitativa exploratoria de siete entrevistas a profundidad y una fase cuantitativa concluyente descriptiva que utilizó 100 cuestionarios cara a cara.

Este estudio sugiere que la mayoría de los entrevistados presentan actitudes positivas frente a prendas de vestir de algodón orgánico. No hay evidencia entre los encuestados de una directa relación entre el consumo de comida orgánica y su disposición a comprar ropa orgánica. Sin embargo, los entrevistados con un mayor nivel de consumo de comida orgánica, si presentan un mayor conocimiento acerca de ropa orgánica, mayores aspiraciones de mejorar su calidad de vida, un mayor deseo de materiales libres de residuos químicos peligrosos, y le dan menor importancia al precio superior de la ropa orgánica. El interés en la protección del medio ambiente es también una característica de estos consumidores potenciales, aunque no está necesariamente relacionado con mayores niveles de consumo de comida orgánica. Al igual que con productos alimenticios orgánicos, las motivaciones para comprar ropa orgánica están principalmente relacionadas con las características específicas del producto que benefician directamente al consumidor.

Los resultados deben ser interpretados tomando en cuenta lo que otros estudios, como el de Carrigan et al. (2001), han revelado sobre el comportamiento de compra, el cual permanece inalterado por temas éticos así los consumidores expresen su intención de compra de productos éticos.

Este artículo puede ser útil a mercadólogos que deseen profundizar en la comprensión de los consumidores y su intención de compra de ropa orgánica. No se encontraron estudios en el momento de realización de esta investigación que relacionaran el valor que los consumidores dan a los atributos de la ropa de algodón orgánico con su consumo de comida orgánica.

Palabras clave

Moda, algodón orgánico, clientes potenciales, prendas de vestir, comida orgánica, actitudes.

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Introduction

Eco-consciousness has been on the rise since the 1980s. Green issues have been addressed by most industries. Fair-trade, organic and whole products have been requested by this 'new breed of shopper - the one with a conscience' (How Green Are Your Jeans? 2006). Moreover, the impact of world events such as natural disasters has had a deep impact on consumer behaviour (Insight - Consumer attitudes: Brands' behavioural therapy 2005). For developed countries such as the United Kingdom, these issues are part of everyday life, making it relatively easier for governments and companies to increase people's awareness in comparison to similar efforts in developing countries.

Organic food is finally taking off by becoming one of the most successful green product alternatives. More people are looking for food labels with the organic 'surname', and are willing to pay its higher price. The Soil Association and Mintel (Clothes and textiles 2005; Organics UK November 2005) give promising news by stating that people are extending their organic lifestyles beyond the food they eat to the clothes they wear.

Environmental trends, green and value marketing (Young, 2002), and the organic movement have influenced the fashion world through 'eco-fashion'. This type of clothing 'take[s] into account the environment, the health of consumers and the working conditions of people in the fashion industry' (Eco-friendly fashion 2006). 'Fair-trade', 'ethically manufactured', 'organic and sustainable materials', 'recycled', 'reused' and 'renewable' are some of the main attributes of this eco-fashion trend (Well fashioned- Eco style in the UK 2006). The recognized UK-based non-profit global network Ethical Fashion Forum (EFF) redefines eco-fashion and provides a broader concept by using 'ethical fashion' instead. For the EFF, ethical fashion is 'an approach to the design, sourcing and manufacture of clothing which maximises benefits to people and communities while minimising impact on the environment' (What is Ethical Fashion? 2010).

The public has seen numerous pieces in the popular press on 'eco-style' including fashion magazines such as Vogue, Elle and Vanity Fair. This might imply that this fashion is slowly starting to influence trends and gain commercial appeal (Green Chic: At last, Top Celebrities Wake up to the Plight of the Planet 2006). Fashion Editor Susy Menkes (2006) presents eco-awareness as a hot topic and a growing business for the fashion industry. However, critics insist eco-fashion is too expensive to have widespread appeal (Focus: Ethical Behaviour: How You Can Make a Difference 2006).

The organic market is not just an altruistic cause. Its size represents an interesting opportunity for organic clothing enterprises. Even though organic cotton production only represented 0.03 per cent of 2001 worldwide cotton production (Organic Cotton Facts 2006), it is growing rapidly and attained a 0.76 per cent of the global cotton production by 2008 (Organic Cotton Facts 2010).

Despite the 2008 recession, 2009 was a dynamic year for the organic cotton sector by reaching an estimated of $4.3 billion on global retail sales of organic cotton apparel and home textile products. This figure represents a 35 per cent increase from the estimated $3.2 billion market in 2008 (Organic Cotton Facts 2010; Organic Exchange Organic Cotton Market Report 2009). For the UK, sales of organic cotton increased by 40 per cent in 2008 - 2009 and the total UK sales of organic clothing and textiles reached £100 million in 2009 (Soil Association Organic market report 2009).

As no previous studies to 2007 were found comparing organic cotton clothing vs. organic food consumption, the aims of this present study are to: (1) define potential customers for organic cotton clothing in relation to their organic produce consumption; and, (2) distinguish their buying attributes of organic cotton clothing.

Organic Fashion Incursions

Every year there are widespread incursions into organic fashion at a higher rate than the decade before. Several brands from high street to retail, to high couture are now using organic materials.

High street UK fashion has seen organic lines such as People Tree with its 'green' concession in Top Shop (Trend Towards 'Green' Clothes 2006) and Oasis with its Future Organic line (Oasis to Stock Organic Clothes 2006; Oasis: Targeting the Fashion Conscience -Datamonitor CommentWire 2006). This eco-trend has also motivated Edun with its worldwide promotion by U2 singer Bono (A Local Pest Becomes the Key to a Better Life 2006), and the main denim makers in the world including Levi Strauss and the Turkish denim giant Mavi (Act Naturally 2006; Forces of nature 2006).

Retail chains also joined the eco trend. Wal-Mart with their line of organic cotton baby clothes (Earth wear; Fashion Goes Green --- And No, We're Not Just Talking About Colour 2006) and Marks & Spencer (M&S), one of the UK's largest retailers, with Fairtrade and organic clothing lines (Your M&S 2007) achieving 1.1 million organic cotton items in sales in 2008 (The market for organic and Fairtrade cotton fibre and cotton fibre products 2009). Lastly, designers from Katherine Hamnett to Armani, to Vera Wang and Oscar de la Renta, have been designing garments with eco-friendly materials (Green Fabrics Make Fashion Statement in Garment Trade 2006; 'Wearing Eco-Politics on Your Sleeve' 2005).

For a general overview on fashion brands using organic cotton, Organic Exchange's surveys and interviews indicate that the top twelve organic cotton-using brands and retailers globally in 2009 were: C&A (Belgium), Nike, Inc. (Oregon, USA), Walmart (USA), Williams-Sonoma, Inc. (USA and recorded last year as Pottery Barn), H&M (Sweden), Anvil Knitwear (USA), Coop Switzerland, Greensource Organic Clothing Co. (USA), Levi Strauss & Co. (USA), Target (USA), adidas (Germany), and Nordstrom (USA). This American non-profit organization states that growth in the usage of organic cotton by these and other companies will continue to grow dramatically in the coming years (Organic Exchange Organic Cotton Market Report 2009).

Organic Cotton Fashion

Organic clothing can be defined as garments made with natural materials that are produced using methods and components that have a low impact on the environment, offering doubtless benefits not only to the environment but to the producers' health and well-being (Moral Fibre, a Beginner's Guide to the UK Market 2005).

Cotton is the most popular organic material used in clothing. Research findings reveal that apparel made with organic cotton may be taken as a signal by consumers that the product is more environmentally friendly than similar products (Eco-Labels: Their Impact on Domestic Markets and International Trade Flows 1999).

The main attribute of organic cotton is the non-usage of pesticides in the fibre production. An example of an environmental catastrophe due to the misuse of pesticides is the case of Uzbekistan, second largest cotton exporter in the world (White Gold Uzbekistan, Cotton and the Crushing of a Nation: The True Cost of Cotton 2005). Other Publications such as Trautmann, Porter & Wagenet (2004) also reveal the drawbacks of these chemicals.

This 'organic' attribute for cotton clothing is often, but not necessarily, accompanied by a 'fair trade' certification. There are dozens of organizations related to these issues, the most dominant in the UK are Pesticide Action Network (PAN UK) (Pesticide Action Network 2006), The Soil Association (About us 2006) that provides organic cotton certification, and The Fairtrade Foundation (Introducing Fairtrade 2005).

Regarding consumer awareness, according to M&S and their "Look Behind the Label" 2006 campaign, 78 per cent of UK people claim they would like to know more about the way clothes are made, their origin, including the conditions in the factory and the use of chemicals in their manufacturing (Fashion Goes Green High-Street Retailers are Rushing to Introduce Ethical Clothing Ranges 2006). This information coincides with PAN UK 2003 survey findings (Moral Fibre, a Beginner's Guide to The UK Market 2005), where 75 per cent of people said they knew little about the impact of clothing production but expressed interest in being informed about this. The PAN UK study also states that UK consumers firstly respond to the ethics of production (*e.g.* attributes such as Fairtrade), secondly to quality, and thirdly to environmental issues (*e.g.* attributes such as organic materials).

Organic Food

Global sales of organic food and drink exceed £23 billion and grew by £2.5 billion in 2007 (Soil Association Organic market report 2009). Organic produce has joined the mainstream and is now being offered by all major chains of supermarkets in the UK as well as numerous local shops, restaurants and caterers (DATAMONITOR Organic Food in the United Kingdom. Industry Profile 2005; Organics UK November 2005). The Soil Association Organic market report (2009) even states that ninety per cent of UK households buy organic products.

Mintel's organics report shows how the organic food market in the UK had maintained a double digit growth of 12 per cent per year from 2003 to 2005. The market figures estimated a £1,060 million organic food sale in 2004 (Organics UK November 2005). Statistics from M&S alone reported £100m in total for 2006 and 2007 sales for organic food, representing a 47 per cent increase (Marks & Spencer announces first 'eco-factories' in update on £200m "Plan A" 2007). Moreover, the US giant Whole Foods Market opened in 2007 in London (Welcome to Whole Foods Market London 2007).

The Organic Food Consumer

Several studies concerning organic foods have been conducted in various countries mainly in the European Union and the US. Some of the latest papers by 2006 were Baker, Thompson & Engelken (2004), Aarset *et al.* (2004), Lea & Worsley (2005), Krystallis & Chryssohoidis (2005), Lea & Worsley (2005), and Padel & Foster (2005). Most studies research consumers' perceptions, profile, attitudes and willingness to pay, product attributes and barriers, among other topics. Attitudes towards buying organic food are presented as positive in most studies (Magnusson et. al 2001). In spite of this, Aarset *et al.* (2004) highlight a lack of knowledge and confusion among the British surrounding the term 'organic'. Research in Denmark and New Zealand suggests that consumers from different countries may have different attitudes towards consuming organic food (Squires, Juric & Cornwell 2001).

Organic Food Consumer Profile

Relevant studies (Magnusson, Arvola & Koivisto 2001; Chinnici, D´Amico & Pecorino 2002) report that women have a stronger intention to purchase organic foods than men. Most organic food consumers present ages that vary between 24 to 44, exhibit a high level of education and/or professional activity, and a medium-high family income (Magnusson et. al 2001, Squires, Juric & Cornwell 2001; D´Amico & Pecorino 2002; Davies, Titterington & Cochrane 1995; Lea & Worsley 2005).

Organic Food Attributes

Most European academic studies present healthiness and curiosity as the main factors stirring interest towards organic food. In contrast, the least important factors are environmental awareness or taste (Magnusson, Arvola & Koivisto 2001; Chinnici, D´Amico & Pecorino 2002; Makatouni 2002; Padel & Foster 2005). Priorities on purchase criteria vary according to the consumer's country, for example, Germans value 'taste' and 'quality' more highly, whereas British consumers see 'healthiness' and 'not genetically modified' as the main characteristics (Baker, Thompson & Engelken 2004).

Methodology

Qualitative exploratory phase - In-depth Interviews

The following interviews were held in order to aid the conclusions of this paper. They were selected because of their different insights into the businesses of organic clothing and production.

1. Lana, William. Greenfibres Co-founder and Director –Organic clothing brand (December 5, 2006).
2. Sanfilippo, Damien. Cotton Project Coordinator of Pesticide Action Network UK, PAN UK – Network that promotes healthy food, sustainable agriculture and an environment without dependence on toxic chemicals (2009) (October 31, 2006).
3. Ton, Peter. International Consultant of Organic Cotton Production and Marketing (December 4, 2006).
4. Duggard, Neal. Manager, Planet Organic, Bayswater Branch -Organic food shop (November 30, 2006).
5. Corry, Richard. Bushwacker Wholefoods Manager -Organic shop in Hammersmith (October 27, 2006).
6. Barranco, Antonio. Professional that developed a project in organic produce during his MBA in The Wharton School (November 28, 2006).
7. Bolton, Roxanne. Morgan Assistant Manager –Non-organic clothing shop in Bond Street (November 4, 2006).

Quantitative exploratory phase - Survey

The survey was carried out during November 2006 with face-to-face questionnaires that contained restricted answers offering multiple choices or scales. Information was collected from 100 individuals, men and women between 20 and 35 years old from various socio-economic and cultural backgrounds.

Maximum heterogeneity is assumed since there is no available information on the proportions of the occurrence of the measured variables in the studied population. Therefore, the variance is 0.25 (S2 = 0.25). The confidence level is set at 95 per cent and the error for the inferences is 10 per cent approximately (E = 0.1). The size of the population under study is infinite (N > 10,000). Consequently, the sample size (n) is calculated as follows (Kinnear & Taylor 1998, p. 430):

$$n = Z^2 \frac{S^2}{E^2} = 1.96^2 \frac{0.25}{0.1^2} \approx 97$$

For practical purposes, the sample size was rounded to 100 sampling elements.

The responders were approached by random and convenience sampling methods (McDaniel & Gates 2006, p. 319) in the six following shopping areas in London: Piccadilly Circus, Oxford Circus, Bond Street, Leicester Square, Knightsbridge and Covent Garden. These areas were selected by reviewing several updated official London guides that established the most visited shopping areas in town. Regarding gender, the goal was to survey at least 60 per cent females. Women's clothing is one of the most popular organic cotton products (The Soil Association, 2005). Women also present a stronger intention to purchase organic foods than men, as mentioned in the Organic Food Consumer Profile in the previous section. Additionally, women are more likely to answer this type of questionnaires.

Univariable and cross-tabulation analyses were applied to collected data. The sample was also divided into strata and answer groups in order to find associations by comparison of the variables.

Data Presentation and Analysis

Responders' Profile

The responders are 65 per cent female and 35 per cent male. 46 per cent are between 20 and 25 years old, 29 per cent have a 26-30 years range, and 25 per cent are 31 to 35 years old. 31 per cent are students, 55 per cent are working, 11 per cent are working while studying, and 3 per cent are other such as 'unemployed'. 11 per cent of the sample is vegan or vegetarian.

Organic Clothes Variables

13 per cent of all responders have bought organic cotton clothes. 41 per cent showed interest in learning more about what organic cotton clothing is and 62 per cent said they will 'probably buy' when answering the question: 'If organic cotton clothes were available in your favourite shop, would you…'

Out of all the responders that have not bought organic cotton clothing, 49 per cent have not bought any because they did not know about the term organic for clothing, 41 per cent have heard about organic for clothes but have not seen it in shops, and 10 per cent gave other reasons such as 'Lack of awareness of where to buy organic clothes', 'I only buy in charity shops', 'Too expensive, do not appear fashionable', 'Never interested' or 'None look fashionable'.

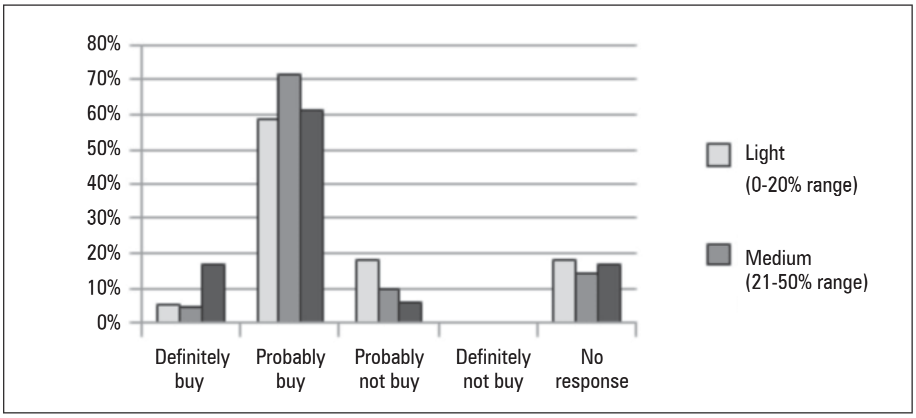
Organic Food Variables

67 per cent of all responders have bought organic food in the last month. 30 per cent do not buy organic produce in their regular food basket, 30 per cent buy 1 to 20 per cent, 22 per cent buy 21 to 50 per cent, 9 per cent buy in the range of 51 to 70 per cent, only 7 per cent buy between 71 to 100 per cent and 2 per cent did not answer. Regarding frequency of consumption, 49 per cent of organic food consumers replied that they buy organic food once in a while, 43 per cent several times per week, 5 per cent once a day, and 3 per cent in all or most of their meals.

Data Analysis

Results present responders at all levels of organic food intake as exhibiting willingness to purchase organic clothing (See figure 1). Out of the responders that stated that they will 'definitely buy' or 'probably buy' organic clothing, 45 per cent are between 20 and 25 years of age, 32 per cent between 26-30 and 23 per cent in the 31-35 age range. 53 per cent of them are working, 32 per cent are students and 14 per cent are studying and working. Moreover, 55 per cent are *light*, 24 per cent are *medium* and 18 per cent are *high* organic food consumers.

Figure 1. Comparison by organic food consumption (Stratum 3): 'If organic cotton clothes were available in your favourite shop, would you…'



The attributes for buying organic cotton clothing 'Enhance my quality of life: Softness and higher quality of cotton' and 'To support the protection of the environment' present higher percentages compared to the rest of attributes, 41 per cent each. In contrast, the two factors for not buying organic clothing that received the highest importance are 'expensive' and 'not stylish' with 45 per cent and 48 per cent respectively.

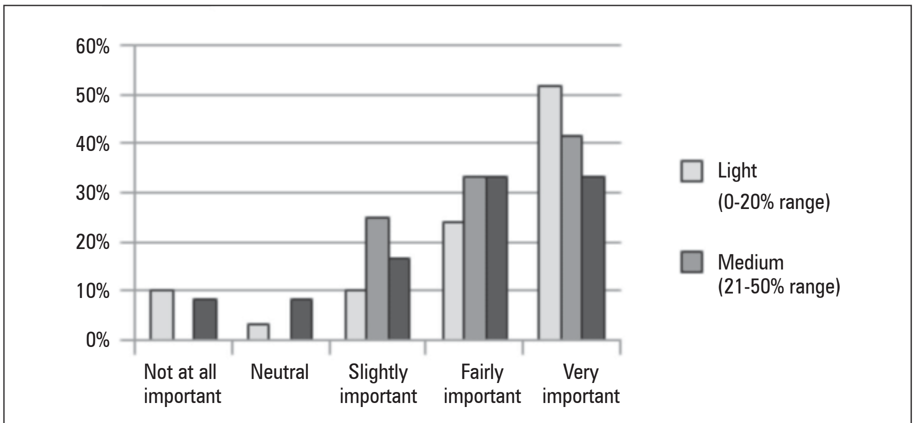
The degree of organic food consumption of the responders is directly proportional to the aspirations of enhancing their quality of life and the desire to purchase clothing free of pesticides. However, the interest in environmental protection of the responder is not necessarily related to a higher degree of organic food consumption. Findings support what other studies, such as that from Davies, Titterington & Cochrane's (1995) report: "consumers who claim to be green are not always the purchasers of organic food".

These results might imply that consumers who claim to be green are not always or will not always be the purchasers of organic cotton clothing, as William Lana (2006), Co-founder and Director of Greenfibres, stated: "…when we started our organic cotton clothing business we initially targeted the 'dark green' consumers and found no response since they tend to go for recycled garments and other options instead…" Lana went on to explain how his company implemented a survey to better understand their costumer profile and found no clear patterns; "they belong to diverse market segments".

Price Analysis

Based on the responses from the survey, the degree of organic food consumption is indirectly proportional to the importance given by the responder to the organic cotton clothing premium price (see figure 2). Additionally, price is a sensitive variable for responders in all degrees of organic food consumption. In other words, only 16.6 per cent of *heavy* organic food consumers would 'definitely buy' organic clothing. This percentage became sensitive and increased to 60 per cent when price was not a concern anymore. The same situation occurs in the *medium* and *light* organic food consumers where in *medium* the variance jumps from 4.7 per cent to 50 per cent, and in the *light* goes from 5.3 per cent to 37.7 per cent.

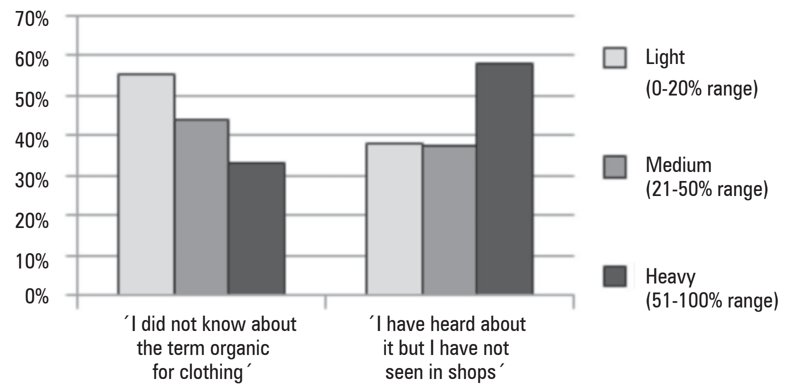
Figure 2. 'Expensive' attribute according to organic food consumption (Stratum 3)



Information on Organic Clothing

The survey showed that the degree of organic food consumption and the occupation can influence the amount of information on organic clothing the responder has. In figure 3, the less the organic food consumption is, the higher the percentage towards the first answer 'I did not know about the term 'organic' for clothing'. Additionally, the higher the organic food consumption, the higher the percentage towards the second answer 'I have heard about it but I have not seen it in shops'.

Figure 3. Comparison by organic food consumption (Stratum 3): 'Why have you not ever bought organic cotton clothes?'



Conclusions

This study suggests that most responders have positive attitudes towards organic cotton fashion. The degree of organic food consumption and the responder's occupation, related to income, are directly related to the amount of information on organic clothing the responder has.

Responders with a higher willingness to buy organic cotton clothing are for the most part women in the 20-25 age range, are employed and are *light* or *medium* (between 0 and 50 per cent) organic food consumers.

The attributes for buying organic cotton clothing 'Enhance my quality of life: Softness and higher quality of cotton' and 'To support the protection of the environment', are 'very important' for most responders. The two main barriers for buying organic clothing are 'not stylish' and 'expensive' garments. Regarding price, the organic food consumption degree is indirectly proportional to the importance given by the responder to the organic cotton clothing premium price. By contrast, price is a sensitive factor for potential organic clothing customers regardless of their organic food intake.

There is no evidence of a direct relation between consuming organic produce and the willingness to purchase organic clothing of the responders. However, the degree of organic food consumption the responder has is directly related to the appeal for enhancing the individual's quality of life regarding the softness and higher quality of the cotton, and the importance of residue-free materials.

The interest in environmental protection is not necessarily related to a higher degree of organic food consumption. Surprisingly, even the *light* organic food consumers grant a high importance to the protection of the environment. Therefore, targeting the environmentally conscious consumers might not be the only or principal strategy organic clothing brands should apply for expanding market share. However, certifications and correct labelling of garments are necessary in order to reach those environmentally conscious potential shoppers.

As in organic food (Wier & Calverley 2002), the responders' motivations for buying organic clothing are firstly related to specific characteristics of the product directly benefiting the consumers, such as 'residue-free materials'; and secondly to characteristics indirectly benefiting the responders such as 'promote social justice and welfare of cotton farmers'.

Managerial Implications

The results of the study can be helpful to marketers looking for a deeper understanding of consumers' wants in relation to organic cotton clothing.

'Organic' clothing needs a re-launch and promotional re-direction. Support from external organizations related to organics is advisable. Marketers have a great challenge in educating consumers and disassociating organic fashions from negative perceptions of the product as 'boring' and 'plain', and the 'health' and 'taste' attributes of organic food. Instead, clothing made with organic cotton should relate the consumer directly 'with the producers' (Ton, 2006) in a similar way as the Fairtrade Mark has effectively accomplished. This approach would not only make the consumer associate organic cotton garments with specific characteristics of the product such as softness of the material, but with the indirect characteristic which benefit the consumer.

Product differentiation, certified labelling, special and educational in-shop product displays, as well as alternative distribution channels are needed for marketing organic cotton clothing. As far as production, lowering lead-times and increasing value chain flexibility is essential. In any case, businesses need to offer brands/products that are fashionable, so consumers will buy regardless of their benefits to the environment and the producers.

World power countries such as the UK could include in their international agenda the support of organic cotton production in third world countries as a concrete, effective and practical strategy for controlling global warming, among other benefits. In addition, an organic cotton offer increase would contribute to a decrease in the fibre price, making organic cotton clothing more accessible to a wider range of consumers.

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