134 The changing values of millennial and Gen Z adults on fast fashion, social media and the sustainability of their clothing purchases.

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Abstract
This paper will focus on new measurable data based on 2018 quantitative research results of millennial and Generation Z adults. A comparison of earlier research will be undertaken to uncover patterns and differences in the past two years. The researcher has analysed the potential changes on the attitudes and fashion habits of the demographic. The following questions will be discussed: 1. Has awareness been raised in the past two years about sustainability amongst the participants? 2. Are there changes in the buying patterns of fast fashion over the past two years? 3. Are the differences measurably different? 4. Finally, because of income level and social media influences, is change on sustainable practices an improbable outcome?

This paper reports on primary research conducted in 2018 from a survey taken by 441 respondents and compares it to the same baseline research conducted in 2016 with 358 respondents. The primary research results measure both demographic and financial status of the respondents. It also measures the collective implications of social media on the purchases of fast fashion, and the personal habits of social media use on the respondents. Finally it measures whether the respondents consider sustainability in their clothing purchases and whether that has changed in two years.

This study will reanalyse the question: 'Has education and social awareness of sustainable fashion made a difference in the buying habits of a target group which is consistently bombarded by fast fashion marketing and peer images on Instagram, Snapchat, Pinterest and Facebook?'

Introduction

The researcher has been following the habits of millennial and now Gen Z adults for the past 10 years. This interest led to a research study in 2016 and a paper published by The University of Sao Paulo ‘Fast Fashion Social Media and the Environment’ (Geib, 2016). The follow up study was administered in 2018, and this paper will discuss the new findings and compare the results and the changes in the opinions of the demographic from 2016.

The researcher has followed the rising popularity of fast fashion in recent years, beginning with the opening of H&M on Fifth Avenue in New York City in 2000 (H&M 2018). Fast fashion retailers such as Forever XXI and Uniqlo were soon to follow. Now, 18 years later, Primark has come to Brooklyn and cheap apparel has never been more prevalent or available to the demographic.

Alongside this phenomenon, the demographic studied has become increasingly interested in a more sustainable lifestyle, with awareness growing that purchasing new clothing is one of the most unsustainable practices in the world. Second to oil, fashion and textiles is the most polluting industry in the world, every stage in a garment’s life threatens our planet and its resources. (Business of Fashion, 2018)

The research seeks to discover whether the demographic in the study has acquired more sustainable practices in the past two years. It also examines how social media continues to influence these practices, and whether there been any shift in this influence. Some studies show that millennial and Gen Z adults are interested in sustainable practices in their clothing purchases, but the researcher’s initial study from 2016 concluded differently:

> *Fast fashion is here to stay. With all the talk of sustainability in fashion she believes that it will have to come from the manufacturer as it will not come from the consumer. Young millennials love their trendy cheap clothes that can be photographed on a daily basis to social media. They also love surfing on social media for new fast fashion trends. Finally, they love being able to buy a trendy outfit hot off the runway for $15-$50. Where that outfit ends up at the end of the fashion cycle is not as concerning to the young millennial, as its more important implications of being photographed on trend on Instagram and being able to do it at an affordable price!* (Geib, 2016)

This quote has caused debate in presentations. Everyone wants to believe that we are becoming more sustainable in our clothing purchases. What have to constantly be considered are the obstacles in price, availability and desire from the demographic measured. The question of education and social awareness in sustainability over the past two years has relevance, but the obstacles are significant. The data does show some measurable changes towards more sustainable practices. The researcher’s question on whether social awareness and education has made a difference in the demographic is limited to the measuring of the answers in the survey and her observations as a professor of 150 Gen Z students each semester.

The researcher is a professor at the Fashion Institute of Technology (FIT), a university in New York City. The school teaches a sustainability course in its fashion business program. The University has many guest speakers come in to speak on sustainable fashion and students are more aware than ever of the ramifications of the fast fashion business on the environment. It is the belief of the researcher that they do want to be more sustainable in their purchases, but they are a small demographic in a New York fashion school. Plus the accessibility of fast fashion retailers on 34th street, six blocks away from the University tempt the students on a daily basis. According to a report by Research and Markets, the four big players dominate the competition in the global fast fashion market: Zara, H&M, Gap Inc. and Uniqlo (Daedal Research, 2017). These are just a few of the retailers fueling the trend.

A major interest of the researcher is how social media influences both fast fashion and the desire of the demographic to be sustainable, what changes in buying habits have occurred over the past two years, and the differences in the data measured.

Methodology

In 2018 the researcher reissued the baseline primary research survey created in 2016, where quantitative questions on the demographic were measured. Appendix A at the end of the paper lists the questions asked in the survey. The survey was created through Survey Monkey, a survey software market research company. For the calendar year 2017, Survey Monkey booked revenue of $218.8 million, up from $207.3 million in 2016. It had an IPO in April of 2018 and is now a publicly traded company. (This information is included to assure the methods were professionally administered by a reputable market research company.)

The survey asks questions regarding the respondent's opinions on fast fashion, social media and sustainability in clothing purchases. The conclusions are based on the research and the comparisons from the two surveys.

The sample population recorded adults age 16 to 36+, male and female. The survey recorded where participants lived, and whether the participants were students. It also recorded whether the participants worked, how many hours a week they worked, and the income earned per week by the participants.

The survey was administered using Survey Monkey. The results of the survey are part of an ongoing study to see if education and public awareness are changing the way young adults (termed millennial's or generation Z) consider sustainable clothing. This is measured by analysing the survey results and comparing the survey answers between 2018 and 2016. One of the most interesting measures in this research over time will be the potential shift in what is considered to be sustainable practices amongst the participants. The researcher will administer the final survey again in 2020 and record the differences in the results. The researcher understands the methodological flaws of a survey where the demographic is limited to the answers of the respondents.

Survey results: demographic data of the respondents

The demographic data was recorded from 441 respondents in 2018. It is being compared to 358 respondents from the survey administered in 2016. 92% of the respondents were female, 8% male. The survey recorded that 87% of participants were from the United States of America, and 13% were from outside the US. 49% of respondents identified as being from New York and 15% from New Jersey, which totals 64% in the New York metropolitan area. Although the majority of respondents stated that they resided in the New York metropolitan area, there were still a variety of different states and international respondents included in the survey. The remaining 23% of the respondents were from other states in the US. There were 13% international respondents in the study. This mix of respondents' locations was very similar in the 2016 survey. 66% of the respondents in 2016 were also from the New York metropolitan area and 23% from other states in the United States. 10% of the survey respondents identified as residing outside the United States in the 2016 study.

The age group surveyed is primarily 19-25, with approximately 75% of the respondents in that age category. In the 2016 study, 84% of the respondents were in the 19-25 categories. It is worth noting that in the 2018 study 20.4 % of the respondents were in the 26-35 categories, where only 5% of the respondents in the 2016 study were over 25. This is a significant change and should be noted. As the survey was administered exactly the same way through email the researcher finds it curious that the demographic was older in the 2018 study. The majority of the respondents to the survey were students. In the 2018 study, 75% identified themselves as students vs. the 2016 results of 92% students. The 2018 results showed that 74% of the respondents worked, in comparison to 60% of the respondents from the 2016 survey.

The average respondent from the 2018 study worked 40 hours a week at an average pay of $350 per week. This is a very low rate, at least by New York standards. According to payscale.com, the average weekly salary of a New Yorker is $1325 per week and the cost of living in New York is 128.8 percent higher than the national average (payscale.com 2018). Since the majority of respondents are from the NY metropolitan area this statistic is worth noting. Money matters and the survey results show this.

Survey results: shopping habits of the demographic

One of the questions in the survey asked: 'How often do you shop at these fast fashion retailers in store or on line per month?' Zara, Forever XXI, and H&M were used as specific retailers. There was a noticeable difference in this question. In 2018, 59% of the respondents said they do not shop at any of these retailers. 35% stated that they shop at these retailers 1-2 times per month. In 2016, 47% of the respondents said that they do not shop at these retailers at all and 39% said they shop at these retailers 1-2 times per month. The most drastic change came in the 3-4 time shoppers per month. In 2016 10% of the respondents said they shopped in these retailers 3-4 times per month and in 2018 the percentage dropped to 4%.

This data shows a significant change in the buying patterns of the demographic. They are shopping the largest fast fashion retailers less in 2018 than in 2016.

The study measures how much money in US dollars the respondents would pay for an article of clothing. 77% of the respondents answered that they would spend $30 or less for a shirt or top in the 2016 survey, whereas only 66% answered the same way in 2018. 31% of the respondents would pay from $30-45 for a top, up from 23% in 2016. In both surveys, the respondents felt a pair of jeans had more value. In 2018, 55% of the respondents would pay $30-$60 for jeans and 29% was willing to pay over $60. This was another change from 2016 where only 18% of the respondents would pay over $60 for a pair of jeans, an 11% change in upward price. The last item of clothing that was surveyed was a dress usually worn out to the clubs around the city. In the 2016 survey it was surprising that respondents would not spend money on a 'club dress.' In 2016, 41% of the respondents would only pay up to $30 for a dress. In 2018 the percentage changed to 24% that wanted to pay $30 or under for a dress. This was a significant change, but still, the price of a club dress has the lowest value of all three items surveyed. In summing up the differences in prices that the respondents are willing to pay for the three pieces of clothing, the researcher is encouraged that the demographic is willing to pay more for their clothing in 2018. This could work in the favor of sustainable or better quality clothing that is significantly more expensive than fast fashion. This statistic looks promising.

Survey results – social media habits of the demographic

One of the changes in the past two years has been the rising capability to shop directly from social media platforms. The researcher had been following the trend in her classroom courses so a baseline question was added to the 2016 survey: 'How often do you shop directly from a social media site?' Although small, this question had an increase from the 2016 results. In 2018 3.3% of respondents said they shop on social media all the time vs. 1.2 % in 2016. It is interesting to read that this is the trend across the industry. According to Brown; despite the industry hype around social media, it actually had an insignificant impact on traffic so far. The growth of shoppers using social media channels has been essentially flat, with only 4.7 percent of traffic share and 2 percent of all orders. (Brown 2018) Perhaps more time is needed for consumers to adopt the channels.

Question 13-15 measures the habits of the demographic on social media. Question 13 asks, 'How often are you photographed on social media in a week?' The 2018 survey shows that 67% of the respondents are photographed one or more times in a week. The benchmark study from 2016 was higher, 78% of respondents were photographed on social media at least one or more times per week. Question 14 asks: 'If you are photographed on social media in a week's time frame how many times will you be in the same outfit?' In the 2018 survey 77% of the respondents said 0 times. This statistic is very relevant to the study as it did not significantly change from the 2016 results, in which 78% of the respondents did not want to be photographed more than one time in the same outfit. This will be discussed further in the conclusions, but the psychographics of the demographic is an important conclusion.

Table 1

Q13 How many times are you photographed on social media in a week?

Answered: 418 Skipped: 23

ANSWER CHOICES	RESPONSES	
0	33.49%	14 0
1-3	58.13%	24 3
3-6	5.74%	24
6-9	1.44%	6
More than 9	1.20%	5
Total		41 8

Table 2

Q14 If you are photographed on social media in a week time frame, how many times will you be in the same outfit?

Answered: 417 Skipped: 24

ANSWER CHOICES	RESPONSES	
0	76.50%	319
1-3	21.58%	90
3-6	1.68%	7
6-9	0.24%	1
More than 9	0.00%	0
Total		417

The question above on social media asks: 'Is it important to you that you have a different outfit on each time you post to Instagram or another social media site?' Of the 2018 respondents, 67% said yes. This is a major factor for the demographic, and was an increase from the 2016 results where 63% responded that it was important to have on a different outfit every time they posted to social media. Just as important with 67% being photographed 1-9 times per week many new outfits will be needed to not be photographed in the same outfit!

Table 3

Q15 Is it important to you that you have a different outfit on each time you post a new picture to Instagram or another social media site?

Answered: 416 Skipped: 25

ANSWER CHOICES	RESPONSES	
Yes	67%	279
No	23 %	137
Total	100%	416

Survey Results: Sustainability Habits of the Demographic

Question 22 of this survey was a measure of thinking for the respondent on whether they felt they were environmentally active or sustainable in their thinking. The question asked ‘Do you consider yourself environmentally conscious or active?’ Interestingly enough, this statistic went down from 2016, with only 20% of the respondents saying yes, in comparison to 27% in 2016. In the somewhat category, the statistic went up to 68% in 2018, vs. 66% in 2016.

Table 4

Q20 Do you consider yourself environmentally conscious or active?

Answered: 398 Skipped: 43

ANSWER CHOICES	RESPONSES	
Yes	20.60%	82
Somewhat	68.09%	271
No	11.31%	45
Total		398

Question 21 was asked to record whether or not the respondents bought sustainable clothing. The 2018 answers to this question reflect the problem of price in purchasing sustainable clothing. 65% of the respondents said sustainable clothing was too high priced, while 18% say it is not fashionable enough. In 2016, 68% of the respondents said sustainable fashion was too high priced, whereas 24% said it was not fashionable enough. The most interesting aspect of the question, and biggest change was in the answer ‘I do buy sustainable clothing;’ 24% of the respondents gave this answer, vs. just 15% in 2016. This is measurable data.

Table 5

Q21 What is the reason you do not buy sustainable clothing? Check all that apply

Answered: 398 Skipped: 43

ANSWER CHOICES	RESPONSES	
Too high priced	65.33%	260
Not fashionable enough	18.34%	73
Not easily accessible to purchase	40.70%	162
I do buy sustainable clothing	24.12%	96

Question 17 asks: ‘How often would you estimate that you donate or sell your clothing?’ This question was put in the survey to get a baseline on this trend and to measure if it will increase or decrease over time. (Geib, 2016) The researcher found the answers to this question and the quantitative responses from the presentations to be some of the most interesting in the study. The change was not significant in most of the categories from 2016. The only measurable change recorded in this question was the answer of the respondent who donated once a week. This jumped from .6% in 2016 to 3.6 % in 2018.

Table 6

Q17 How often would you estimate that you donate or sell your clothing?

Answered: 416 Skipped: 25

ANSWER CHOICES	RESPONSES	
Once a week	3.61%	15
Once a month	12.50%	52
Once every 6 months	70.43%	293
Never	13.46%	56
Total		416

The final question in the survey asks: ‘If money was not a factor, would you rather have 50 pieces of fast fashion or 15 pieces of high-quality sustainable clothing?’ A whopping 83% of the respondents answered that they would rather have high quality or sustainable clothing. This was up from 77% of the respondents who also preferred high quality fashion or sustainable clothing in the 2016 survey. This answer was a significant change, and shows that designer brands hold great mystique over the demographic. They want to purchase them but cannot afford them.

Table 7

Q18 If money was not a factor, would you rather have 50 pieces of fast fashion clothing or 15 pieces of high quality designer or sustainable clothing?

Answered: 416   ***Skipped: 25***

ANSWER CHOICES	RESPONSES	
15 pieces of high quality designer or sustainable clothing	82.69%	344
50 pieces of fast fashion clothing	17.31	72
Total		416

Conclusions

Based on the comparisons of the surveys, the researcher concludes that education and social awareness is starting to make a difference to young adults in their sustainable practices when it comes to fashion. As the data suggests this is happening slowly, and is supported by a case study in sustainability and fashion education by Cosette Marie Armstrong and Melody L.A. Leeway (2013) that introduced sustainable education in the classroom, and concluded it to have a positive measurable outcome. As the researcher's study does not ask the demographic about this question, she concludes it through the study of the differences in the answers from 2016 to 2018. Are the buying habits of the demographic changing and the answer is most definitely, yes. This is seen in a comparison of the results in the methodology. The case study by Armstrong and Leeway (2013) also contributes to the current dialogue about sustainability education by providing a rich description of how students experience alternative approaches. These alternative approaches are being learned by the students through the digital platforms that host them. Awareness on sustainability practices is evolving among this demographic outside of the classroom, and their sustainable practices look different from what was originally predicted.

The sustainable trend that is surfacing in the researcher's classrooms, online courses and club meetings is thrifting. There is a trend gaining momentum in buying used clothing. **'**There's also a cultural shift happening towards secondhand. It used to have a stigma of being only for poor people. With the word "old" now being replaced by "vintage" and accompanied by the trendy value of "authentic", second hand's star is now rising and the stigma is gone for a lot of people'. Kestenbaum (2018). Thrift stores have always been an option, but have been more prevalent in brick and mortar stores such as Buffalo Exchange, The Good Will stores, or Plato's Closet, to name a few in the US.

There is a lot of retail dollars to be made in resale. Last year, 44 million women shopped secondhand, up 9 million from 2016. In 2017-2018, the growth in the leading resellers is forecasted to be a 49% increase (Kestenbaum 2018). This is a huge increase that has evolved in the past two years.

The trend towards ‘thrifting’, a green practice involving the reuse, recycle or re-style of a product that allows that product a longer life in its use, thus diverting the product from a landfill. With heightened environmental awareness, a new audience has come to thrift. The Eco-thrifter shops in thrift stores because it is a finely tuned way to reduce one's carbon footprint with shopping behaviour. The Eco-thrifter not only seeks to save money, but also to reduce their carbon footprint; even though this is one of the easiest ways to recycle, this form of supporting the environment has received little media attention (Sensagent). This practice is one of the ways that the researcher sees the demographic choosing to be sustainable into the future. It also fulfills the need for new clothing to be photographed on social media at a fraction of the cost. As stated in the survey results 77% of the respondents said they would never want to be photographed in the same outfit on social media more than once.

Today, the accessibility of thrifting apps, and the excitement among the demographic to use those apps to make extra income and find inexpensive used fashion, is taking on a new momentum and is changing the buying habits of the demographic in the study. The students that the researcher works with frequently download a new app to sell or buy their clothes. Poshmark, threadUP and The RealReal are just a few of the most popular apps. There are many others being created by entrepreneurial millennials realising the popularity and the opportunity to create a business model from used clothing sales. Relove is another new app in the US that targets fast fashion brands and tries to match items to the customer at the price they are willing to pay. Sustainable fashion is expensive and the young consumer still cannot afford it. Designer quality clothing or sustainable expensive brands, such as Reformation or Everlane, and accessibility to these brands is limited. According to Attaman Hahn-Peterson, (2018)

> *Sustainable fashion brands are so few they can be counted on the fingers of one hand. Of course, there are labels such as Everlane, Patagonia or Reformation which are actively pushing sustainability as a core attribute of their brands. Yet, the vast majority of brands do not offer the scale or variety of sustainable fashion items to meet millennial expectations and tastes*.

The researcher has to agree with this statement. According to the study, one of the biggest reasons that the demographic does not buy sustainable clothing is the lack of fashion and high prices. Yet 83% stated that they would buy designer or sustainable clothing if they could afford it. With the trend for used and vintage designer clothing they now can.

This trend is now getting more popular in other parts of the world. One of my Brazilian students said an app that they use in Sao Paulo, Brazil allows the users to contact each other to sell items, and then meet in person to generate the transaction. It should be noted that the mail system in Brazil is unreliable, so meeting on a city corner is a more efficient way to buy and sell clothing. This is a big change from 2016 when the researcher visited Sao Paulo. The consensus amongst the students at that time was that used clothes were of no interest to them. The Brazilian student was rising into the middle classes, and new designer clothing was a way to show off that new status. According to Matteus, (one of the students at The University of Sao Paulo) in just two years the young Brazilian consumer has changed their views and is now welcoming thrifting as a form of sustainability.

In 2017 the students that the researcher worked with on an IFFTI faculty exchange in Germany were very interested in thrifting and being sustainable in their clothing purchases. They had a club that was producing sustainable products for the school store, manufactured in Turkey. It was apparent that German students were educated more thoroughly on sustainable practices in fashion and were using them practically in their studies.

Renting clothing is another trend among urban young consumers of fashion starting to gain momentum in the US. Rent the Runway is a business model that started in 2009, but is gaining momentum as a subscription service. Members can rent their designer looks more cheaply, fulfilling their wish to wear designer brands and be sustainable at the same time. As a result, clothing will not get dumped into a landfill, because it gets returned for another user to wear.

> *According to Jennifer Fleiss, the founder of Rent the Runway, 'these women might not otherwise get to wear high-end designer dresses for another 10-20 years,' based on their price; she added, 'We see young women putting on these dresses and feeling empowered, twirling in the mirror.' A positive experience in that designer's dress can – and usually does – lead to future purchases. It also creates buzz around the hot, new designer's creations. With 'fast fashion' retailers like Zara and H&M selling designer knock-offs for less, Rent the Runway has found a way to reverse the trend toward commoditization of designer labels.* (Galbraith, 2013).

According to the study one of the major roadblocks to being more sustainable is social media, and being photographed on a consistent basis. This has not changed since the last study in 2016.The demographic is being photographed on social media on a daily basis. The desire to look good, and be in new clothes in every post, is still the number one priority. According to Kozlowska (2018) 'the rise of social media has meant that everyone, not just celebrities is expected to maintain and curate a personal brand. Since we are constantly documenting our lives and posting them online for public judgment, getting caught in the same outfit more than once is seen by many as a major faux pas.'

This reality cannot be discredited and so young consumers of fashion are paving a new way to fit sustainability, a low price point, and a supply of new clothing into one wardrobe. Thrifting is the best way for the demographic to fulfill this need to own a new outfit for every social media post, yet still be sustainable and live within the budget of a student or young adult's salary. The manufacturer has failed to get the price and variety of sustainable product into the closet of the customer (Geib 2016) was the conclusion from the researcher's study in 2016. The conclusion in 2018 is that fewer young adults are shopping in fast fashion stores. They are also willing to pay more for their clothing, but this demographic still cannot afford sustainable clothing as it may be traditionally purchased as a new item. Young adults are still actively participating in being photographed on social media and want a new outfit weekly. If more sustainability is desired, as the study suggests, then the conusmer must pick other options - and today, they are available. Thrifting, re-selling clothing, buying used clothing on trendy apps and potentially renting designer brands are ways for the Gen Z consumer to fulfill these options while still being sustainable in clothing purchases. These changes in how clothing is bought, worn, sold, and recycled also offer potential new avenues for study in future research.

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Appendix A

Survey Questions

1. What is your age?
2. What is your gender?

In what state or US territory were you born? If born outside of the US please fill in country of origin below.

4. Are you a student?
5. Do you currently work?
6. If you answered yes to the previous question, how many hours per week do you work?
7. What is your weekly personal income?
8. How often you shop at these Fast Fashion retailers in store or online per month?
9. How much do you usually spend on a shirt/top?
10. How much do you usually spend on a pair of jeans?
11. Females, how much would you usually spend on a club dress?
12. What is the maximum amount of money you can personally afford to spend on one item of clothing?
13. How many times are you photographed on social media in a week?
14. If you are photographed on social media in a week time frame, how many times will you be in the same outfit?
15. Is it important to you that you have a different outfit on each time you post a new picture to Instagram or another social media site?
16. How often do you shop directly from an advertisement posted on a social media site such as Instagram or Facebook?
17. How often would you estimate that you donate or sell your clothing?
18. If money was not a factor, would you rather have 50 pieces of fast fashion clothing or 15 pieces of high quality designer or sustainable clothing?
19. What are the main reasons you shop for new clothes? Please list in numerical order of priority to you, one being the most important. 1. Need a new outfit for a specific event 2.Been seen in current clothing too many times 3. Clothes are out of style. 4. Clothes have worn out because they are too old. 5. Clothes have worn out because they are poor quality.
20. Do you consider yourself environmentally conscious or active?
21. What is the reason you do not buy sustainable clothing? Check all that apply. 1. Too high priced 2.Not fashionable enough 3. Not easily accessible to purchase enough 4. I do buy sustainable clothing
22. What do you think the definition of sustainable clothing is?