Democratizing Fashion Customization:

Accessible Alterations, Sustainable Practices and Consumer Needs

A Dissertation written in partial fulfillment of the requirements of the Master of Science in International Fashion Marketing

By:

Nancy Rhodes

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Approved by:

Dissertation Advisor

Name: Michael Cohen Signature: Michael Cohen

Reviewer 2

Name: David Grad Signature: David Grad

This dissertation/project is my own original work and has not been submitted elsewhere in fulfilment of the requirements of this or any other award.

Student signature

Nancy C Rhodes

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Abstract

Globally, 80 billion new pieces of clothing are produced each year, an increase of 400% from only 20 years ago. Consumers purchase double what they bought 15 years ago but keep garments only half as long. The fashion industry continues to produce at exponential rates and the average consumer now disposes of 70 pounds of clothing annually; clothing that can take up to 200 years to decompose. Innovative solutions are required to reduce the detrimental effects of the fashion industry to the planet. Fashion apparel brands are increasingly aware of the importance of adopting sustainable practices, however, the cycle of overproduction and overconsumption continues.

The alterations market, a subsection of the fashion industry, can be a viable solution to engender sustainable practices. In addition, through fit and customization, the practice of alterations can increase consumer body-positivity, inclusivity and self-esteem. A "re-fashion" industry can focus on enhancing consumers' owned apparel and reduce the unsustainable rate of overconsumption and the amount of apparel waste.

In order to inform new strategies and business models, the current study is designed to identify and understand consumers' and fashion industry professionals' perceptions, attitudes and reported behaviors regarding sustainability and fashion alterations. Qualitative in-depth individual interviews (IDIS) were conducted with professionals in the fashion industry representing a variety of roles and expertise (N=9). An on-line survey was conducted with consumers to explore perceptions and preferences relating to alterations (N=165). The results of the in-depth interviews revealed that fashion professionals had not previously considered alterations and customization as a sustainable practice and only carried out alterations on an as-needed-basis. The survey findings were similar and also indicated that consumers considered time and convenience as main barriers to carrying out alterations. Findings indicate that raising

consumer awareness and developing new business models to increase alteration accessibility are the foundation for re-invigorating the alterations industry.

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Chapter I: Introduction

The road that led me to pursue a degree in sustainability is long and winding. I could say it started years into my career when I saw the destructive trail of waste I had left as a shoe designer working for big brands. In reality, I can now see a chain of events from childhood fantasies, professional ambitions, industry background, and my personal relationships that gave me the strength and inspiration to create a new path forward.

When I was three years old, my babysitter invited my mom and me to her college fashion show. I don't remember a lot about the day, but I can vividly recall watching an ethereal velvet green cape floating down the runway. That was it. I was hooked. I knew at once that I needed that kind of beauty in my life forever.

My parents, recognizing my newfound passion and being the gems they are, began to enroll me in after-school art programs and encouraged me to pursue my dreams. Since my determined personality was already well-formed early in my childhood, they probably also realized that, once I had made my mind up about something, they really had no say in the matter. And I'd also like to believe that they were confident that I would ultimately succeed at whatever path I decided to pursue.

At the age of seven, I decided on the name and the nature of my first brand. Pink Lemonade, as my young imagination conceived it, would be a clothing line for kids like me. When I was twelve, a school assignment that involved the creation of an imaginary place inspired me to create Zapatos Isle (the name derived from the Spanish word for shoes). At fifteen, I moved beyond my childhood fantasies and began to think seriously about my future life as an adult. I informed my parents that, in order to succeed, I would have to find a niche – and

that I had determined that shoes would be my path to success. To this day, I have no idea where this epiphany came from or why I was so certain that it was the correct path to follow.

When the time came to explore my college options, I initially considered Parsons School of Design and several other art schools, but I eventually decided on the University of Oregon, recognizing the importance of pursuing a Bachelor of Arts degree that would allow me to balance my business ambitions and my interest in studying art. In all honesty, I was actually deferred by Parsons before I finally made the decision to accept my offer at the University of Oregon. At that young stage of my life, I was far more interested in hanging out with my friends than in concentrating on my art and achieving the type of portfolio that would earn me admission to a prestigious art school. But for an aspiring shoe designer, attending the University of Oregon, the alma mater of Nike founder and all-around legend, Phil Knight, wasn't the worst decision for me to make. And I soon discovered some of the other advantages of attending a major university, such as going to football games, joining a sorority, and making lifelong friends.

I've shared all of this information about early life to emphasize the point that – if you'll forgive the corny rhyme – I've always had a passion for fashion. I still vividly remember the day in 2005 that I began my first job at Jenkel, a private label company owned by the son of Charles Malka, co-owner of Charles David, a Los Angeles-based fashion company known for its high-quality shoes. I also recall the first shoe that I ever produced – a cowboy boot mule, of all things – that was sold under the BCBG label. The shoes were only available through the BCBG outlet stores, but seeing the shoes that I had designed displayed in the Palomar outlets in San Diego is a priceless memory I'll never forget.

Another cherished memory from my early fashion career was meeting Beyoncé – yes, you heard that right! Queen Bey herself! – and her famous mother, Tina Knowles, the Creative Director of Dereon, at their home in Houston, Texas. My sales rep and I watched in awe as the two celebrities casually reviewed the Spring 2006 collection that we had laid out on their pool table for them to approve.

In 2009, I fulfilled another dream when I joined the team at the prestigious fashion company, Kenneth Cole Productions, in Manhattan. I was completely awestruck as I walked into the company's corporate headquarters on West 50th Street.

The entire experience was glorious and glamorous and represented everything that I could ever have wanted. And while I've been truly blessed to have had so many wonderful experiences in the fashion industry, the magical expectations from my childhood failed to consider some of the more difficult and challenging aspects of pursuing a career in fashion. On occasion, I've found myself packed and on a 12-hour flight to a work assignment in China with only a few hours to prepare – followed by a grueling 15-hour work day after a 5 a.m. arrival. I've had to duck as shoes that were thrown at me – okay, thrown in my direction – by bosses who were angry over lead times and samples. I've suffered from thrush, painful lesions in my mouth, brought on by stress. Worst of all, I've experienced firsthand the dark side of an industry in which products and profits are valued more highly than people and the planet we share.

The majority of my career has been in volume footwear. There are various ways within the industry to describe the type of product that I've created: First Cost, Landed Branded, Mid-tier, Opening Price Point, Special Make Ups. All of these phrases represent different ways of achieving profits through lower margins and higher volume. We buy from the factory for less.

We sell to the company for less. We make money through the quantity of pairs we sell with the hope of a constant stream of production and future big orders.

The products that I've designed have sold at a wide range of outlets, including Target, Payless, Marshalls, TJ Maxx, Ross, Burlington, Fred Meyer, and Costco – both as branded and as private labels. At the risk of oversimplifying what is actually an extremely complicated business model, suffice it to say that, for the last 15 years, I have built products with a constant focus on the bottom line. The divisions I've been a part of, which are sometimes described as the bread and butter of the business, are guided more by customer demand than by brand direction. For example, if a buyer wants thirty samples to be produced for their style-out (an arduous process in which buyers decide which samples they will buy for the season) in two weeks, we somehow find a way to produce thirty samples in two weeks. And if we determine that a buyer might be interested in a particular style, we'll make extra samples in anticipation they may need it rather than waiting for them to ask. The samples that we've provided have been in addition to – not in place of – the branded shoes that end up on the floors of Nordstrom or Bloomingdales. While a portion of what you see at a discount store may come from excess inventory or an exciting department store cancellation, the majority comes from a division like mine. Big discount stores pay less for goods upfront which can be a result of the volume of goods purchased, but more likely a result of reduced quality or potentially risky factories.

By the end of each season, I would typically have thrown out hundreds of samples, with an adoption rate that was often as low as ten percent. Reviewing our total output for the season, I would try to determine how the companies for whom I worked could be more focused in their requests and needs with the goal of maintaining at least a 50 percent adoption rate. This would mean that half of the styles I entered into the sample process would actually go into production.

Achieving a higher adoption rate would allow us to reduce the amount of materials that we used for samples, as well eliminating much of the carbon pollution that results from making and shipping the products. Achieving a higher adoption rate would also provide desperately needed relief to overworked employees in our sample rooms, while also giving me an opportunity to recover my own depleted creative capacity and to complete projects more effectively.

To this day, I start each season with high hopes that I will achieve my goal of increasing the adoption rates – and yet every season inevitably ends with continued over-sampling, over-burdened employees and production facilities, and my own personal sense of frustration and burnout. Increasingly, however, my experiences of being overworked and overburdened has become far more than a cause for frustration and complaint. It has become a catalyst that has led me to where I am today in pursuing this degree, writing this dissertation, and actively working for positive change in the fashion industry.

I first became passionate about the idea of accessibility to customization through alterations at the end of one of my production seasons. Once again overburdened by work that I had far too little time to complete, I hired a TaskRabbit to help me declutter and reorganize my small New York studio apartment. My hope was that I would become more zen-like and calm in a well-organized space that I was able to navigate and control.

As Ali, my TaskRabbit, began to take me through the items in my overstuffed closet, she pulled out a bag I barely recognized. Once we deciphered that the mysterious contents of the bag were actually alterations that I had originally intended to take to the dry cleaner, I quickly made the decision to donate them to charity – rather than taking the time that would be required to re-

purpose them. By the time we had finished examining the contents of my closet, I ended up donating several other items that I had previously tagged as “not quite right.”

When I purchase clothes for myself, there’s always a real sense of excitement as the potential starts to unfold. Will this be my next “little black dress”? Will this be the top I wear when I get my next job? Spoiler alert: I still have the houndstooth short sleeve blouse that I purchased when I successfully interviewed for my first big job. Conversely, I immediately threw away the floral tank I was wearing at the time of my first big layoff.

I experienced a nagging feeling of unease as I donated clothes that I had never worn myself but that I hoped would be worn by someone else. My “Marie Kondo” moment of joy - though at the time I didn’t know who she was - in decluttering my space, was dampened by a feeling that something wasn’t quite right. I buried the feeling deep in my gut below where I felt the ease of letting things go.

In the days that followed, I searched for ways to find personal fulfillment outside of my career. Through a series of happy accidents, I was awarded a partial grant from the United Nations to attend GCNYC, a new outpost of Glasgow Caledonian University. The university’s motto, “For the Common Good!”, reflected its emphasis on fashion sustainability.

Through my experience at GCNYC, an understanding of the true value and benefits of sustainability gradually began to replace the wasteful and deceitful greenwashed messages to which I had been repeatedly exposed through corporate marketing messages throughout the fashion industry.. How, I wondered, can anything that’s produced be sustainable? Like most people in the fashion industry, I wasn’t fooled by vague sustainability clais. I had become jaded by any claim of sustainability in an industry where constantly changing lead times and margins

made it virtually impossible to make business decisions based on environmental and social welfare concerns.

It was at GCNYC that I first learned about design efficiencies within a supply chain that increased profits while decreasing footprints. Examples of such practices included Walmart replacing every traditional light bulb in its stores to energy-efficient light bulbs and Macy's reducing the amount of packaging in its men's button-down shirts. I am not claiming these companies are sustainable, but these examples convinced me that, with thought and innovation, it is possible to move toward sustainability and to simultaneously address the needs of people, the planet, and corporate profit.

I arrived at GCNYC, determined to make an impact after having felt underappreciated, undervalued, and unfulfilled for much of my career. At the time of my arrival at the university, I had no idea what the impact of my studies would be. As a part of my values-based leadership course with Professor of Leadership and Executive Coach David Grad, I completed a project on Sara Blakely, the SPANX founder. I was impressed by Blakely's observation that, in the process of creating her business, she looked at every idea as an opportunity, always asking herself if each new idea was the one that would take her to the next level.

Inspired by Blakely's example, I began to approach each new idea that I encountered as a potential opportunity to create design efficiencies that could add value and profit without waste. I found my new idea during a conversation with my classmate Evan, whom I had met during the first day of school and who had since become one of my dearest confidants. Throughout the academic year, Evan and I continuously embraced our inner nerds, talking together for hours about design innovation, waste management, leadership, and all things sustainability. In the

course of this particular conversation, we began discussing alterations, and how she had supported herself during her first Masters program by finding people who needed alterations. As she was speaking, a light bulb suddenly turned on inside my brain.

As soon as we had finished talking, I immediately went home and began rummaging through the clothing in my closet. I felt like Dorothy right after she landed in Oz and the entire black-and-white world had suddenly burst forth into color. I realized all at once that by refining, customizing, and re-purposing garments that had already been manufactured I could promote sustainability without adding more waste to an already saturated industry.

Researching the market, I became increasingly convinced of the enormous potential that could be achieved by altering and repurposing previously used clothing. This was the idea I had been searching for all my life - I just didn't know it until then. By re-invigorating the artisanship of alterations through a new lens of engendering sustainable practices, I could actively contribute to the reduction of perfectly good clothing being tossed aside and sent to landfills and, in the process, also reduce the enormous waste and environmental depletion and pollution I had witnessed during my tenure in the fashion industry. On a more personal level, I could fulfill another of my lifelong ambitions of promoting self-esteem through fit. I've experienced frustration with standard sizing for my entire life and have spent my fair share of moments crying in dressing rooms because nothing fit me properly. While I didn't understand it at the time, I have increasingly come to realize that it was never about being too small or too big; the real problem was that the proportions of standard sizing did not match my body. At the time, I simply blamed myself rather than the clothes, but I've now discovered a far better way to understand and address the problem.

This shining lightbulb that lit up inside my brain in May of 2019 has fulfilled me in a way that I had never experienced before, challenging me to rethink my life goals and approach old problems with exciting new solutions. In addition to completing my dissertation, I have recently launched *altern*ew, an on-demand alterations and repairs service with a mission to promote sustainability, inclusivity, and body positivity through fit, customization, and individualization. According to the Environmental Protection Agency, 86 percent of all unwanted clothing ends up in landfills. My goal in completing this dissertation and launching this new business venture is to contribute to the reduction of that wasteful practice.

Chapter II: Literature Review

Introduction

The literature review is organized by topic areas as follows:

- Consumers and the Apparel Industry
- Sustainability, Technology, and New Business Models
- Contemporary Attempts to Promote Resale
- Psychology of Fit and Alterations

Consumers and the Apparel Industry

According to the Statista Market Forecast, the apparel industry is projected to total up to US$364,868m in 2020, with a projected annual growth rate of 1.9 percent over the next three years. The market's largest segment is Women's Apparel with a market volume of US$190,794m in 2020 (Statista Market Forecast, 2020).

Market growth is largely dependent on consumer trends, which inform the growth or decline of every industry, from the cars we drive to the homes we buy and the food we eat. Fashion trends, which are more fast moving than most other industries, have become increasingly volatile in recent years, driven by the globalization of the marketplace and the growing availability of modern conveniences such as new technology and social media (Ryan, 2017). In order to have a clearer understanding of the current fashion landscape, it is important to review the modern history of consumers and apparel purchasing.

History of consumer purchasing behavior in fashion. Consumer purchasing behavior in the fashion industry has evolved dramatically over time as access to new technology and more efficient production tools has increased the affordability of fashion products (Sterlacci et al, 2017). A review of the literature identifies four important historical moments in the history of modern fashion, including: the introduction of automated textile machines during the Industrial Revolution; the increased consumer appeal of mass-produced fashion items in the years immediately following World War II; the preference of young consumers for cheaply made clothing and new fashion trends during the 1960s; and the introduction of Fast Fashion during the 1970s (Indacavage, 2018; Queens, accessed 2020). Each of these historical moments will be briefly discussed below.

The Industrial Revolution is widely acknowledged to be the first moment in modern history when purchasing behavior changed dramatically for the fashion industry. These changes were driven primarily by the introduction of textile machines, and, most importantly, sewing machines into garment production facilities. The introduction of automated sewing rapidly advanced the ability of garment manufacturers to produce in bulk, reducing the price of clothing while increasing the scale and speed at which fashion merchandise could be produced and purchased. (Maheswari and Gorda, 2019)

Another important change occurred after World War II, when middle-class consumers began to recognize the value and appeal of mass-produced clothing. This was followed by further changes during the decade of the 1960s, when changing cultural trends and the Vietnam War resulted in “young people embrac(ing) cheaply made clothing to follow…new trends and reject the sartorial traditions of older generations” (Indacavage, 2018).

In the 1970s, H&M and Zara were two of the most prominent companies that introduced the fast fashion movement into the industry. Inditex, the corporate umbrella of Zara, credits this new business model for its ability to shrink the gap between fashion creation and the customer, bringing customers closer than ever before to the products they wanted and at an affordable price (Hansen, 2012). By adopting the fast fashion production and distribution model, apparel companies were able to reduce production time while increasing the number of collections and the volume of products to reach stores. During this period of rapid growth and constantly increasing consumer demands, fashion brands were able to keep up with consumer demands by outsourcing production globally (Kenly, 2012).

With the introduction of fast fashion, Zara provided a new value proposition of newness and scarcity, increasing the appeal of smaller product lines, which were purchased quickly and gone in a matter of weeks. Prior to the fast fashion movement, brands typically presented four collections per year – one for each season. As opportunities to develop unique in-season products increased over the years, many brands eventually added two additional "resort" collections, increasing the total to six collections per year. Prior to Zara's innovations, brands generally maintained this four-to-six-collections per year calendar. Through its fast fashion business model and the resulting capacity for quick turnaround, Zara was able to offer new collections twenty-six times per year – at an unprecedented pace of one new collection every two weeks (Hansen, 2012).

According to the NPD Group, the average brand loyal shopper visits a store of his or her preferred brand 4.1 times per year, in contrast to the average Zara brand loyal shopper, who visits a Zara store 17 times per year. "Modern fashion consumption and the rise of fast fashion

has shifted consumer-purchasing behaviour toward items of little perceived value, with small economic and psychological investments required" (Gabrielli et al., 2013).

According to recent literature, fast fashion has created its own subset of consumer purchase behavior and has become embedded into all of modern fashion (Schlossberg, 2019). The consequences of fast fashion have been double-edged, however. While the new fashion movement is appropriately celebrated for the ability to give customers exactly what they want when they want it, it has also resulted in increased environmental depletion and pollution by the fashion industry. "More than 60 percent of fabric fibers are now synthetics, derived from fossil fuels, so if and when our clothing ends up in a landfill (about 85 percent of textile waste in the United States goes to landfills or is incinerated), it will not decay" (Schlossberg, 2019).

Advertising, influencers, and celebrity culture. In recent years, consumer word of mouth has become an increasingly important influence on the preferences and purchase behavior of fashion consumers. Through the interconnectivity provided by social media platforms, millions of people are continually exposed to the informal recommendations of other consumers making consumers themselves increasingly important "influencers" in the fashion marketplace and effectively disrupting the dynamics of traditional paid advertising (Warren, 2018). "Influencers," as Garvin has noted, are defined by their ability to influence potential buyers of a product or service by promoting or recommending the items on social media (Garvin, 2019).

Today, celebrities and other influencers provide brands with the opportunity to leverage the reputation of popular icons for the appeal of their products and the growth of their brands. Collaborations between brands and celebrities, as well as the emergence of influencer-founded brands, are growing at a rapid pace as consumers look for ways to feel connected emotionally to

what they buy (Youn-Kyoung, 2019). As one notable example, *Something Navy*, an influencer who grew to fame through Instagram and other social media, launched a collaboration with Nordstrom that was so popular that the brand's online store site crashed within an hour of its launch due to the unprecedented user volume. The *Something Navy* launch, which exceeded projected sales expectations. is indicative of many successful influencer-brand collaborations. Kylie Jenner, an influencer who gained fame through a reality television show, *Keeping Up with the Kardashians*, launched her own beauty brand through her Instagram account in 2018, generating $360 million in sales in the first year of operation. Today, Jenner has 141 million followers on Instagram (Berg, 2019).

More recently, data has shown that micro influencers with 2,000-5,000 followers have created opportunities for brands to leverage smaller stage platforms with niche communities to further company messaging (Moreno, 2019). Overall, influencers and celebrities have become an important tool in the fashion industry reaching consumers on Instagram, YouTube, Facebook, and other emerging social media channels, such as Tik Tok and Byte. As an important part of their appeal, social media platforms provide "community" members with the opportunity to shop directly for the products they desire without leaving the online platform. This development allows an increasingly broad segment of consumers to momentarily satisfy their seemingly insatiable need for instant gratification, contributing to growing patterns of overconsumption in the process. Conversely, as will be discussed in greater detail below, it has also enabled a different consumer segment to engage more actively in sustainable and conscious fashion purchase behaviors (Wertz, 2018).

Overconsumption and overproduction. According to recent estimates, more than 100 billion articles of clothing were produced in 2018 – representing a 400 percent increase over the

previous two decades (McKinsey, 2016; “Fast Fashion Quick”, 2018). The average apparel shopper in 2018 purchased approximately 68 items a year, five times more than in 1980. Notably, consumers today keep their garments only half as long as did the consumers of the previous generation. The vast majority (86 percent) of discarded purchases and unsold items end up in landfills. In this context, it is important to note that, even with consumers buying at such an unprecedented and alarming rate, apparel companies are continuing to overproduce in order to mitigate against the risk of not meeting consumer demands (Mlotek, 2019).

Fast fashion and technology - the speed at which the supply chain functions and the ways consumers access products - have transformed consumers’ purchase behaviors. Subscription services, shoppable social media posts, and data driven customized ads based on personal online preferences have resulted in rampant overconsumption. “Customers now interact with firms through a myriad touch points in multiple channels and media, and customer experiences are more social in nature” (Lemon & Verhoeff, 2016).

In an effort to meet the dizzying pace of consumer demands, brands outsource to subcontractors who then outsource to other subcontractors (Jacoby, 2018). In some cases, as many as four or five suppliers may be contracted down the line by a name brand, making it difficult to map and audit the safety standards of suppliers. This dark side of overproduction was exposed in 2013 with the tragic collapse of the Rana Plaza apparel factory in Bangladesh that killed 1,134 local garment workers (Tansy, 2015). The widespread media coverage of this tragedy served as a catalyst for global awareness of the exploitative working conditions created by overproduction, highlighting the lack of industry transparency regarding environmental and safety hazards to consumers and international business owners (Tansy, 2015). Since the tragedy of Rana Plaza, retailers have faced increasing pressure to be transparent about their supply chain,

with the availability of new technology making it easier to document and monitor the conditions under which garments workers labor and fashion items are produced (Stauffer, 2018).

Luxury. As the previous section has suggested, fast fashion meets consumer needs for affordable on-trend products at all times. Unlike fast fashion, the value of luxury is informed by brand heritage. Many luxury brands are hundreds of years old, attracting and maintaining a committed consumer base through the promise of enduring quality and appeal through classic silhouettes and coveted status (Han et al, 2010). The Burberry trench coat and the Chanel suit or LBD (little black dress) are just two examples of these classic, iconic silhouettes, which are instantly recognized in a way that can be compared to the immediately recognizable Nike swoosh and the three stripes of Adidas.

In contrast to luxury fashion's promise of classic designs, many current fashion-conscious consumers, particularly millennials and GenZers, are exhibiting a greater interest in products that are fresh and unexpected. In spite of the apparent incompatibility of luxury fashion (with its emphasis on quality and classic design) and fast fashion (with its emphasis on quick profits and rapid turnarounds), the common emphasis on "limited availability" provides at least some opportunity for a shared value proposition between the two approaches to fashion. As Cialdini has noted (2009), the influence of scarcity postulates that consumers are likelier to purchase something if they are informed that it's the "last one" or that a "special deal" will soon expire (Schenker, 2019). This allows for a higher level of urgency for purchase and more perceived value regardless of cost.

Originating from the powerful luxury category and moving into all brand classifications of the fashion industry, the value proposition of status, scarcity and value are resonant and

aspirational for consumers. The urgency to elevate profits and meet consumer demand has superseded governance over environmental impact and production efficiency and has resulted in serious problems in the apparel supply chain that conflict with the traditional priorities and commitments of the luxury segment of the fashion industry. “Luxury and premium brands provide their customers quality and expertly crafted products and deliver them with empathy, trustworthiness and generosity to build client relationships,” observes Milton Pedraza, founder and CEO of Luxury Institute, regarding the traditional relationship between luxury brands and the consumers of the garments that they produce.

The discordant tenets of scarcity, exclusivity, and profit growth of these brands has led to unexpected negative consequences. For many brands, both luxury and fast fashion, the cost of destroying unsold inventory is perceived to be more cost-effective than the devalued brand equity that would result from discounting or donating. In 2017, it was reported that Burberry burned more than $36.5 million worth of clothes. It is not just designer brands engaging in this type of practice.In 2017, more than 16.5 tons of H&M stock was burned.

In an interesting attempt to undo some of the damage, discarded apparel stock was burned, replacing coal, to help power a small Swedish city, Vasteras (Cox, 2018). In addition, Burberry now claims to have careful processes in place to minimize the amount of excess stock produced. Burberry has also joined other organizations to work towards a circular fashion economy as part of Ellen MacArthur Foundation’s Make Fashion Circular Initiative. There are several examples of luxury using their power to promote sustainability. Global luxury group Kering, was verified and approved by the Science Based Target (SBT) initiative to create science-based goals around reducing our carbon footprint (Disko, 2016). Other brands including Stella McCartney, Eileen Fisher, and Mara Hoffman have become synonymous with

sustainability, pioneering innovation in sustainable materials, efficiencies and social calls to action.

Another similarity between fast fashion and luxury is the importance of user experience as a factor in determining purchase behavior. Finding the right product is and will remain an important factor in any purchase decision, but among many contemporary consumers, the actual shopping experience has become an increasingly important part of the process through which products are identified and selected. With many customers abandoning in-store shopping for the Internet, the sensory experience of how a store looks, sounds, and feels becomes increasingly necessary to attract and maintain the interest of in-store shoppers. Luxury fashion has played a leading role in ensuring the quality and appeal of all aspects of the shopping and product selection experience, expending as much of its capital in product marketing and presentation as in product design and manufacturing (Soltes, 2018).

Consider the recent example of Louis Vuitton, who in February of 2004 opened a four-story, 22,000-square-foot boutique on Fifth Avenue designed by renowned architect Peter Marino that features details such as flashing LED screens and a bronze and chestnut staircase. “A boutique's location and "wow" factor may not always translate to hard-and-fast sales, but image is all-important in the world of luxury. A shopper's first impression is of utmost importance” (Hanna, 2004).

Changes in consumer attire. Another significant change in consumer behavior has been the growing popularity and acceptance of the informal dress culture. There are several main reasons for this trend and resultant shift, including science - fabric technology and innovation;

awareness of health and wellness; enhanced user experiences; as well as celebrity and social media influence (Mageean, 2017).

Science has provided access to new materials that wash easily or wick away sweat, making them more comfortable for daily wear (Poplin, 2020). Lycra in 1958 provided a new stretch fabric, and the more recent introduction of Gore-Tex in 1969 made possible the creation of waterproof and breathable designs that were more comfortable than the weather-resistant fabrics that preceded them (Li, 2018). The introduction of these synthetic fibers as well as lycra and spandex, amongst others, were able to boost athlete's performance through their core functionalities (Hanif, 2018).

In addition to providing more comfortable and versatile garments, designers and brands also have a substantial influence on the way people dress and the types of fashion that they prefer. Nike, Adidas, and Underarmour who together control a majority of the sportswear market, influence sportswear at both the luxury and the mass level (Salpini, 2019).

In women's activewear, Nike maintains a top spot in market share followed respectively by Lululemon, Victoria's Secret, Under Armour, Adidas, Athleta, Victoria's Secret's Pink and Old Navy. Interestingly, Lululemon grew faster than Nike in the U.S. women's market in 2018 and may potentially surpass Nike based on their current trajectory (Salpini, 2019). Part of this may have to do with its women's focused brand identity. In a recent article focusing on the women's growing sportswear and athleisure industries, Russ Kahn, Senior Vice President of Puma North America Retail, noted the following:

> I think we probably all did a disservice to the female consumer and the woman consumer over the past 10 or 15 years. I think for a long time athletic brands said, 'We can just

> shrink it and pink it and that will be good enough for the female consumer.' And good enough is not good enough anymore. (Salpini, 2019)

In addition to a growing need for inclusion in the industry, there is a budding commitment to health, wellness, as well as a growing fitness lifestyle among consumers. Athleisure brands, in response to this trend, are placing health and well-being as primary aspirations in the assortment they offer. This differs from the available positioning of sports brands which focus more on performance and endurance (Mageean, 2017).

Uniquely, the athleisure trend and it's blend of aesthetics from both the sports and fashion industries provide a mutual uplifting - fashion is giving sports an uplift in credibility and sports giving fashion functionality (Hanif, 2018). Today, it is commonplace to see a celebrity wearing the same pair of athleisure sneakers or leggings as a minimum-wage student, a trend that has provided a new accessibility to fashion for a large segment of consumers. In 2016, Merriam Webster added the term *athleisure* to its dictionary in recognition of a new fashion category that is projected to outperform all others (Yotka, 2016).

athleisure noun

Save Word

ath·lei·sure | \ ˈath-ˌlē-zhər, -ˌle-, -ˌlā-, *nonstandard* ˈa-thə- \

Definition of *athleisure*

: casual clothing designed to be worn both for exercising and for general use

// Of course, *athleisure* has lately become a fashion buzzword, a term intended to embrace the kind of clothing that a woman might be able to wear at work, to the gym, and then to dinner.

— Rob Haskell

—often used before another noun

// *Athleisure* gear has reportedly unseated denim as the go-to clothing item of choice for teens.

— Nedra Rhone

First Known Use of *athleisure*

1976, in the meaning defined above

History and Etymology for *athleisure*

blend of ATHLETE and LEISURE

Figure 1. Merriam Webster Definition of Athleisure

In addition to Nike and Adidas, a number of other designers, such as Tory Sport and Stella McCartney, have created their own new athleisure brands with the rate of new brands in the space growing exponentially (See Figure 2 below). “Athleisure as we know it today evolved from a century-long history of American sportswear into its own unique trend that capitalizes on both our society's emphasis on comfort and the technology that allowed for advanced synthetic fibers” (Poplin, 2020).

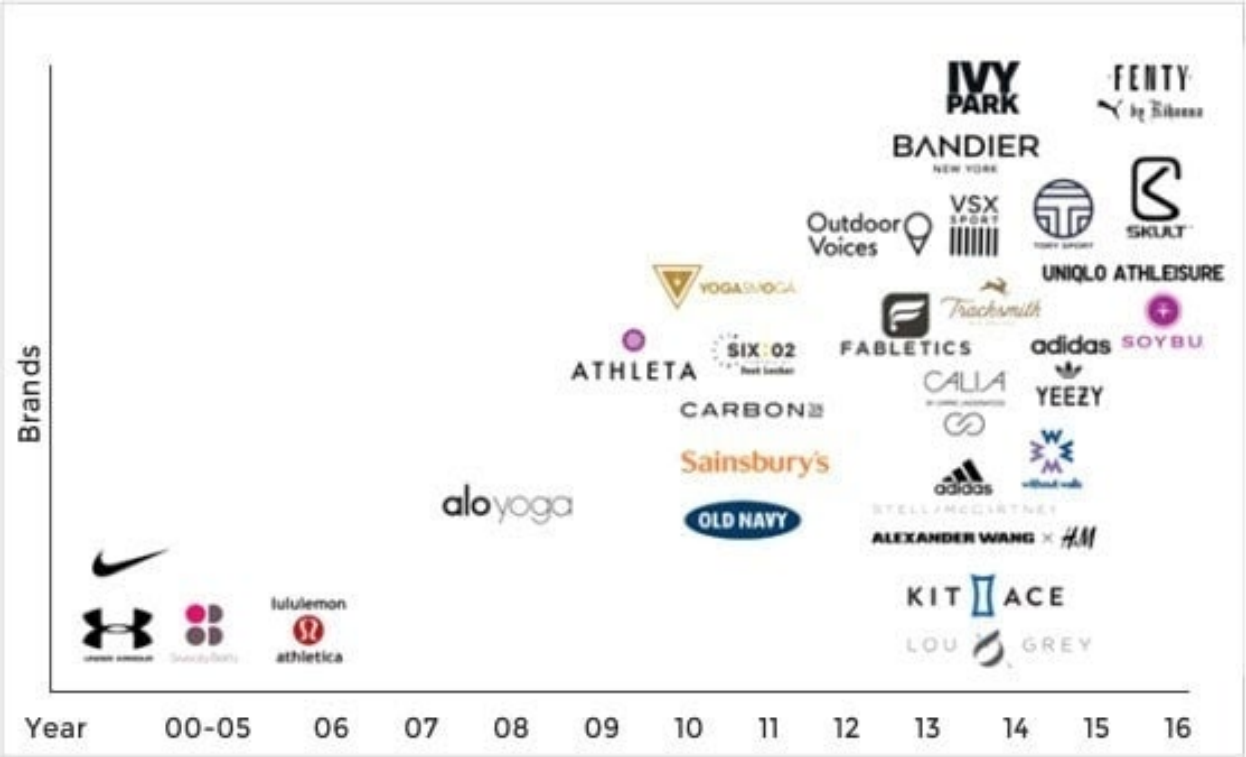


Figure 2. Growing athleisure category by year

Sustainability, Technology, and New Business Models

The World Bank Group estimates that apparel manufacturing is responsible for roughly twenty percent of all industrial water pollution and also releases ten percent of all carbon emissions in the atmosphere (Fleischmann, 2019). According to current estimates, 80 percent of discarded clothing ends up in landfills due to a lack of collection systems and ineffective redistribution systems (Gandhi, 2019). Once they have been deposited in a landfill, discarded garments, many of which are made from synthetic fabrics, can take up to 200 years to decompose. According to one current estimate, landfills in India are currently being filled with so much waste at such a rapid pace that by 2050 the nation will require a landfill the size of its capital, New Delhi, to accommodate all its waste (Ians, 2017). In response to this impending environmental crisis, a

number of major companies have begun to utilize technology to develop new and sustainable business practices - redefining the supply chain and innovating a net-zero future (Morlet et al, 2017).

New business models. As the discussion above suggests, new business models have begun to emerge throughout the fashion industry to meet consumer needs in the current sustainability-focused climate. These models include: shared economies, resale, conscious consumerism, and the use of experiential marketing among others. In Vestiaire Collective's Guide for Sustainability, Dr. Anna Brismar identifies seven distinct models of sustainable fashion (see Figure 3) (Alex, 2019).

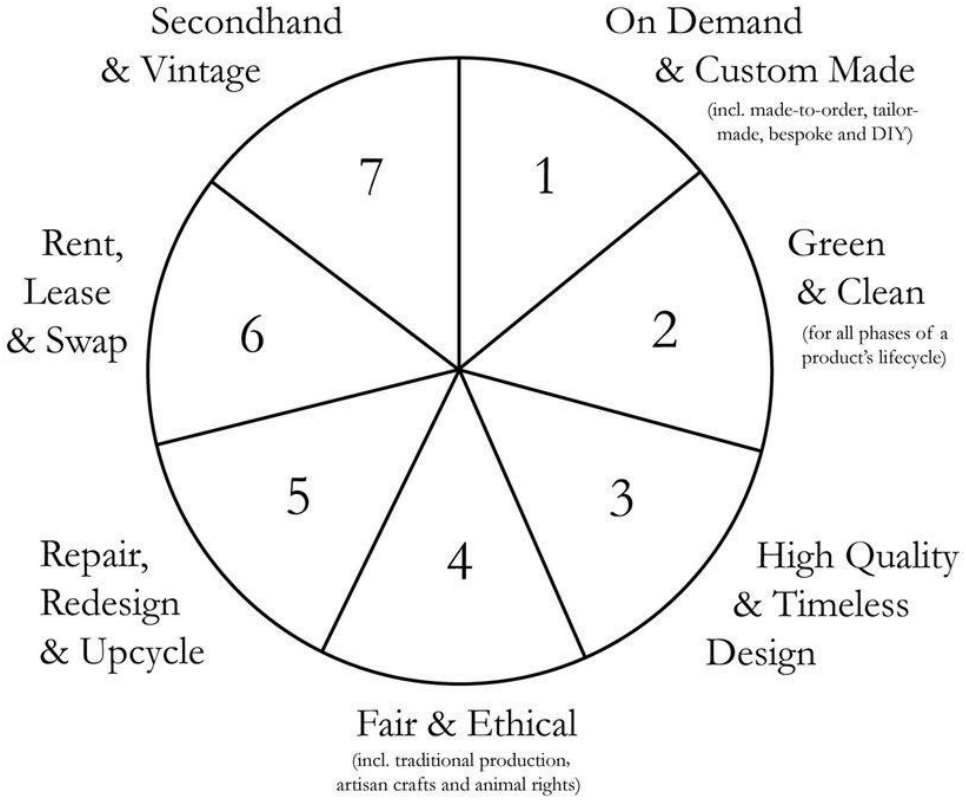


Figure 3. The Vestiaire Collective Seven Forms of Sustainable Fashion

Circular and collaborative economies. Globally, innovative models of circular and collaborative economies have emerged from the intersection of technology, growing population and evolving consumer demands. As described by Jeremiah Owyang, the sharing economy (also variously referred to as mesh, the peer-to-peer economy, collaborative economy and collaborative consumption) is a socio-economic system built around the sharing of human and physical resources (Morgan, 2016). Owyang's research findings indicate that, when information about goods is shared, the value of those goods increases and empowers business, individuals and the community to share a wide range of resources (see Figure 4, the Collaborative Economy Honeycomb) (Morgan, 2016).

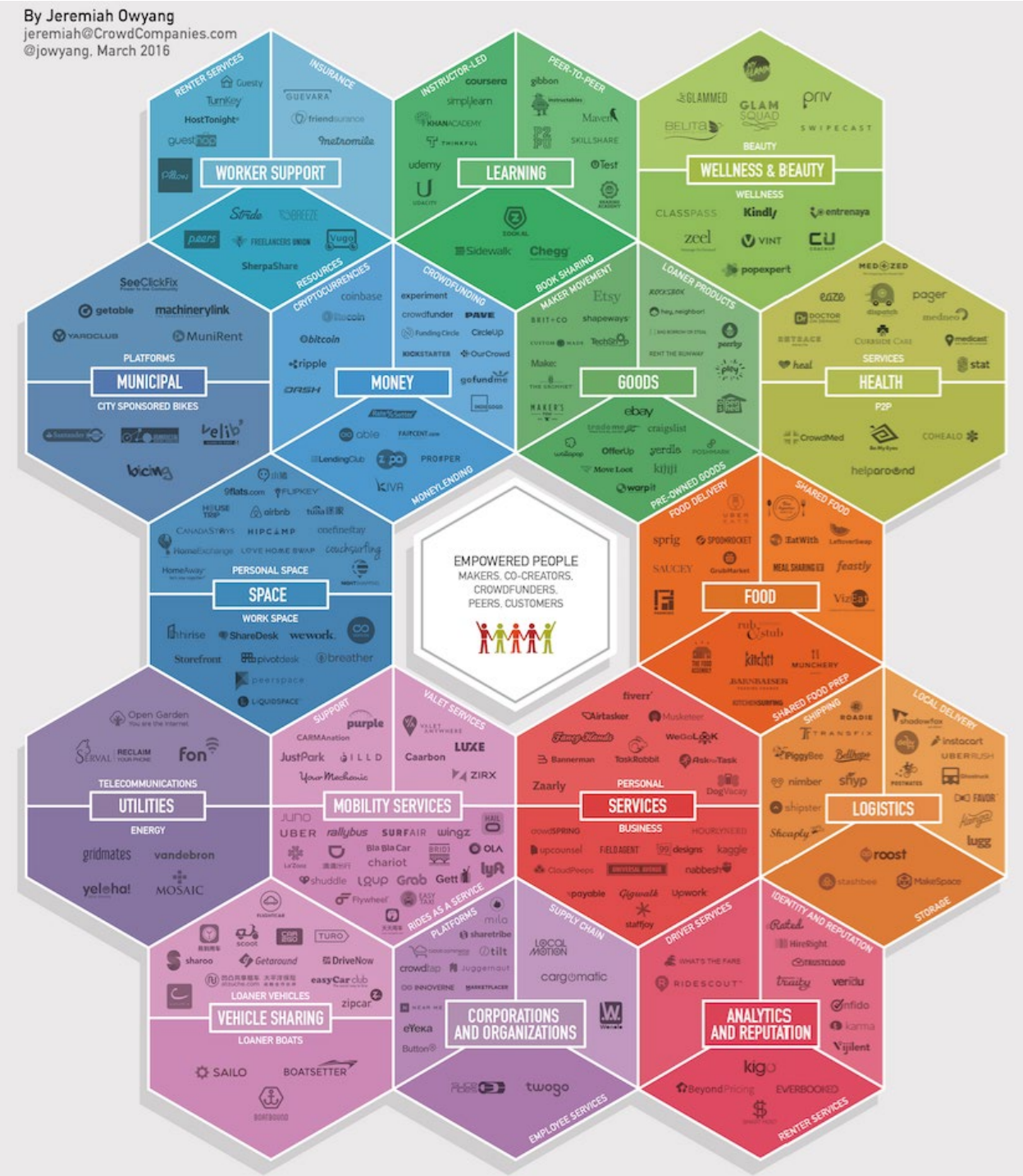


Figure 4. Collaborative Economy Honeycomb Version 3.0

In 2017, Ionna Constantiou postulated the Four Models of Sharing Economy Platforms - Chaperones, Franchisers, Gardeners, and Principals - and grouped companies accordingly by

shared characteristics and roles (see Figure 5). According to Constantiou: "Sharing economy platforms combine organizational and market mechanisms in innovative ways to gain competitive advantages over incumbents. These mechanisms are combined in two key dimensions: tight or lose control over participants, and high or low rivalry between participants" (Constantiou, 2017). The primary financial drivers for these share-based companies include the financial climate, untapped idle resources, and heavily funded startups competing in the space. Businesses operating within and across platforms act as intermediaries, matchmakers or gatekeepers. In doing so, they mitigate risks, build trust among the participants and lower the costs of transacting for their user bases. Constantiou's matrix is summarized in Figure 3 below (Constantiou, 2017).

	Control	
Rivalry	**Loose** Minimum standards or guiding principles for platform participation are set by the platform owner	**Tight** Platform participation is specified, standardized and monitored by the platform owner
High Pricing scheme based on real-time changes in supply and demand	***Chaperones*** Prototypical Example: **Airbnb** • Value proposition: Service differentiation • Other examples: Homeaway, Rentomo, Apprentus	***Franchisers*** Prototypical Example: **Uber** • Value proposition: Low costs and efficiency gains • Other examples: Lyft, Postmates, Caviar
Low Pricing scheme based on compensation of the suppliers' costs	***Gardeners*** Prototypical Example: **Couchsurfing** • Value proposition: Self-organization and community building • Other examples: BeWelcome, BlaBlaCar, Peerby	***Principals*** Prototypical Example: **Handy** • Value proposition: Low costs and risk mitigation • Other examples: TaskRabbit, Zeel, Deliveroo

Figure 5. Typology of Sharing Economy Platforms by Control and Rivalry

As Constantiou notes: “Neither the sharing economy as such nor its key attributes are radically new. However, the diffusion of digital technologies, particularly the Internet and smartphones, has enabled sharing economy platforms to become sufficiently scalable to generate a critical mass of users.” (Constantiou, 2017).

In the apparel industry, the evolution of fast fashion and technology has propelled new ways to innovate the production and purchasing of clothes in more sustainable ways. Many collaborative solutions were originally implemented as sustainable initiatives, while others found sustainability to be a side effect of innovation. A leading example in this category is the rental economy. The original innovator in this market, *Rent the Runway*, makes use of the Services and Products System (PSS), a circular model that employs eco-efficient services with the potential to replicate and compete with the ‘fast-fashion’ industry (Fernandes, Solange et al, 2019).

Rent the Runway began as an innovative way to provide consumers with access to variety in the apparel market without having to make a commitment to purchase. The rental business model gives the consumer the opportunity to participate in evolving trends without guilt, indecision or outgrowing or tiring of purchases. According to Carver Queally, senior analyst of product strategy at Gap “This practice completely reworks the way that traditional retail has always operated and would lead to a more sustainable future. The way in which retailers are currently using natural resources will eventually expire and leave a broken planet in its wake” (Queally, 2019).

The rental economy continues to grow and innovate. As one recent example, Tulerie, a peer-to-peer, invitation-only fashion rental company, allows users to rent their own clothes, shoes and accessories to one another – the app acting as a shared medium for borrowers and

lenders (Chavie, 2020). As the rental industry grows, volume retailers are searching for ways to participate in this trending circular model. For example, the online apparel rental site Le Tote recently acquired the department store Lord & Taylor, and Nordstrom has partnered with *Rent the Runway* to integrate new ways of shopping to reach "conscious consumers" as described in the Conscious Consumer section of the literature review, while also offering variety to their current consumers (Howland, 2019; Pezzini, 2020).

Another sustainable initiative being integrated at both the luxury and mass levels is circular fashion, also known as the closed loop. The goal of circular fashion is to use today's products as resources for future use in order to reduce the quantities of discarded products deposited into landfills (see Figure 6. below). The Ellen MacArthur Foundation's Make Fashion Circular Initiative reports that companies are finding new ways to sort and regenerate textiles for maximum reuse. The Global Fashion Agenda has created a circular fashion commitment among top retailers and brands to benchmark circularity goals and publish an annual Status Report to keep track of signatories' progress in implementing and reaching targets for the 2020 Circular Fashion System Commitment (Morlet, 2017; Global Fashion agenda, 2019).

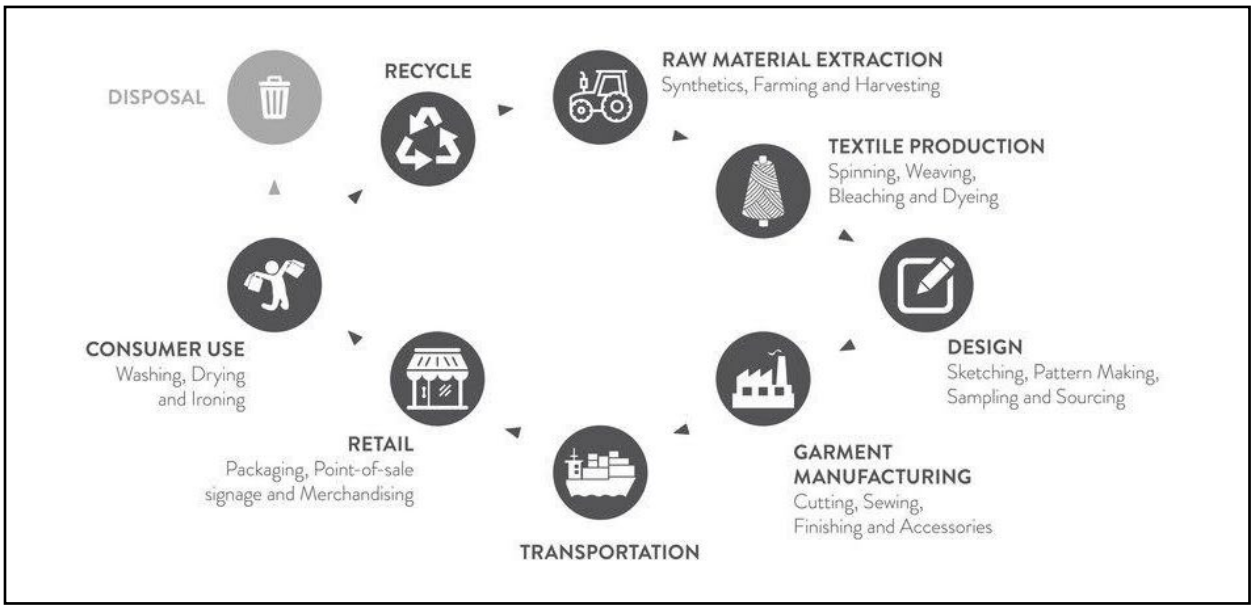


Figure 6. Redress Design Awards Circular Economy

Conscious Consumerism. Although people bought 60 percent more garments in 2014 than in 2000, they only kept the clothes they purchased for half as long (McKinsey & Company, Ellen MacArthur Foundation). With the increasing availability of research about the environmental impact of fashion manufacturing and the wasteful manner in which garments are disposed, consumers are becoming more aware of the role played by their own patterns of purchasing and consumption in damaging the planet. This increasing level of consumer awareness about the environmental costs of their behavior has provided a catalyst to new consumption models (McNeill and More; 2015).

According to a 2019 research report, 19 percent of fast fashion-related online searches conducted during the previous year were linked to the environment, ethics and sustainability (Gilliland, 2019). The phrase, “conscious consumerism,” has recently been coined to represent consumers’ increased awareness of the human and environmental impact of their purchasing decisions (McGroarty, 2019). Today’s consumers are far more likely than were the consumers of

previous generations to "vote with their dollars," reflecting critically about the materials from which their garments are made, the working conditions under which they are produced, and the impact of garment manufacturing on the natural environment. According to Jennifer Nguyen, "The first inklings of the modern concept of 'dollar voting' can be traced back … to 1954, when economist James Buchanan stated that individual participation in the economy is a form of pure democracy in Individual Choice in Voting and the Market." (Nguyen, 2019). In recent years, conscious consumerism has become far more pronounced than in the past, as new technology has made consumers more aware of the negative impacts of the fast fashion trend and the impact of their own fashion choices on the natural environment (Stein, 2019).

Slow fashion. The slow fashion movement is one important contemporary manifestation of conscious consumerism. The slow fashion movement was inspired by the slow food movement which began in the mid-1980s. The term itself was coined by Kate Fletcher of the Centre for Sustainable Fashion. "As with the slow food movement, Fletcher saw a need for a slower pace in the fashion industry." (Hill, 2018)

As a corrective to the destructiveness of the fast fashion trend, the advocates of the slow fashion movement recommend a return to the more conservative consumption habits of earlier generations. Consumers are encouraged to shop less often, buy fewer products and search for higher-quality products made through more sustainable production processes (Hill, 2018). Instead of instant gratification, consumers are encouraged to celebrate the art and skills involved in making clothes, recognizing and honoring the contributions of the workers who produce the garments. Characteristics of the contemporary brands that advocate slow fashion include high quality, locally sourced and sustainable materials; a maximum of three releases per year; and the

limitation of most sales to smaller stores. Slow fashion is, by design, not scalable (Fletcher and Grose, 2012).

Experiential Marketing. The experience movement has also contributed to the growing promotion of customization and sustainable practices. Through experiential marketing, brands are able to showcase authenticity through shared actions in a visual way. As transparency grows, according to Jennifer Horner, Corporate Responsibility Specialist for PVH Corp:

> Brands will need to communicate their efforts to alleviate urgent social and environmental related issues with consumers or risk being perceived as negligent. Messaging must be authentic or risk being perceived as greenwashing. In this context, experiential marketing events are an opportunity for brands to communicate their social and environmental related causes while educating and allowing consumers to actively participate. (Horner, 2019)

Patagonia is a prime example of a corporate brand using experiences to further its mission. The company's clear and purpose-driven mission statement reads as follows: "Patagonia is in business to save our home planet." Patagonia donates one percent of each year's sales to environmental organizations (Johnson, 2019). In 2002, it began funding a nonprofit, 1% for the Planet, through which it shares and furthers its mission-driven business model with other organizations. Through the nonprofit's site, users are able to join environmental groups and learn about environmental causes. Patagonia's commercial site combines product purchases with activist communication. In Patagonia's stores, customers can go to a special Worn Wear department for some quick repairs or tips for self-repair (Semuels, 2019).

Technological innovation. In "The State of the Ecommerce Fashion Industry: Statistics, Trends & Strategy," Aaron Orendorff writes about main trends driving growth in the fashion industry, specifically in the area of e-commerce. The trends he describes include the increased availability of online and smartphone access; the creation of experiential commerce opportunities through innovative technology; and a rising middle-class of consumers, both in the US and globally, with enhanced buying power and disposable incomes. As Orendorff notes, the majority of these new consumers are between 16 and 34 years old.

Orendorff also identifies the biggest threats to established brands, including increased market fragmentation due to a reduction in brand loyalty; high online return rates; fast fashion's speed to market competition; and the increased demand for brands to have ethically sourced and green manufacturing materials.

From a technological perspective, the fashion industry will grow online through machine learning, artificial intelligence and ecommerce automation tools. These tools offer highly relevant experiential and personalized customer experiences (CB Insights, 2020).

Examples of how artificial intelligence has supported business growth have been manifested in all business models – from sharing and circular economies to customization and new models like at Stitch Fix, which claims to "leverage data science to deliver personalization at scale, transcending traditional brick-and-mortar and e-commerce retail experiences" (Lake, 2018). In the Stitch Fix model, customers purchase a subscription box based on their own individual profile. Once they receive a subscription box, they can either keep everything or return any individual items that they don't like or need. Stitch Fix uses the data from each customer's ongoing purchase behavior to create algorithms that will continue to improve the

service's ability to anticipate and provide the preferred style for each person, including an ability to anticipate the potential appeal of new trends for each individual subscriber (Ahuja, 2015). "The better the Stitch Fix stylists—human and machines—are at providing their customers with products they will love, the better their business runs. As they invest in merchandise they know their customers will love, the less they waste on warehouse space, return costs and donating items that weren't sold" (Marr, 2018).

Customization. Customization has been the standard model for garment production for most of human history. With the dramatic expansion of fashion markets and the invention of mass production techniques, the last two centuries have been the lone exception. In 2017, Andrew Edman wrote, "Pure duplication at a massive scale remains the route that can net the greatest profit, and so it persists for physical goods, even in instances where we would be better served by bespoke solutions" (Edman, 2017). In this instance, bespoke solutions include items made to order reducing waste through proper fit and zero excess inventory. Mass customization is a modern application of customization creating value by some form of interaction between the customer and company at the fabrication and assembly stage of the operations level to create customized products with production cost and monetary price similar to those of mass-produced products (Kaplan and Haenlein, 2006)

In a 1997 Harvard Business Review study, James H. Gilmore and B. Joseph Pine II defined four types of mass customization; collaborative, adaptive, cosmetic, and transparent. These are definitions that continue to be used today and are described as follows.

- *Collaborative customizers (also co-creation)* (O'Hern & Rindfleisch, 2010) help consumers recognize what they need, to recognize factors that will fulfill those

needs and to create customized products following those guidelines - tailored suits are an example.

- *Adaptive customizers* offer one standard product to customers along with a few customization options. - clothing alterations are an example.
- *Cosmetic customizers (also personalization)* advertise a standard product differently to different groups of clients. - adding logos to a baseball hat is an example of this.
- *Transparent Customizers* deal with providing customized products to individual customers without telling them that the products are exclusively produced for them. - repeat orders of customized clothing is an example of this (Luenendonk, 2015).

Through different lenses of sustainability and conscious consumerism – and in recognition of macro trends in personalization – companies and individuals can now offer their own customization at scale or create brands that connect people and products. Technologies such as automated custom pattern making, rapid one-high laser cutting systems and modular sewing systems make affordable customized and mass-customized clothing possible (Ashdown, 2007).

MTailor provides a technological service through which consumers can use their cell phones to measure themselves for perfect-fitting custom clothing (MTailor, 2020). Other recent examples of customization include Campbell and Kate, a brand that specializes in fitted shirts for fuller busts (Campbell and Kate, 2020), and cupp, a new bra company which uses Facetime to allow its employees to chat directly with customers and help them measure their bra size (cuup, 2020).

Technology has also afforded greater opportunities for mass access to the benefits of customization. According to an April 2018 YouGov survey, 26 percent of US consumers have personalized a product, 29 percent of which are in apparel and footwear. See figure 7 below (Garcia, Krista). Examples of these types of customization include monograms embroidered on hand towels and M&M's with a personalized image printed on each candy (e-marketer, 2018).

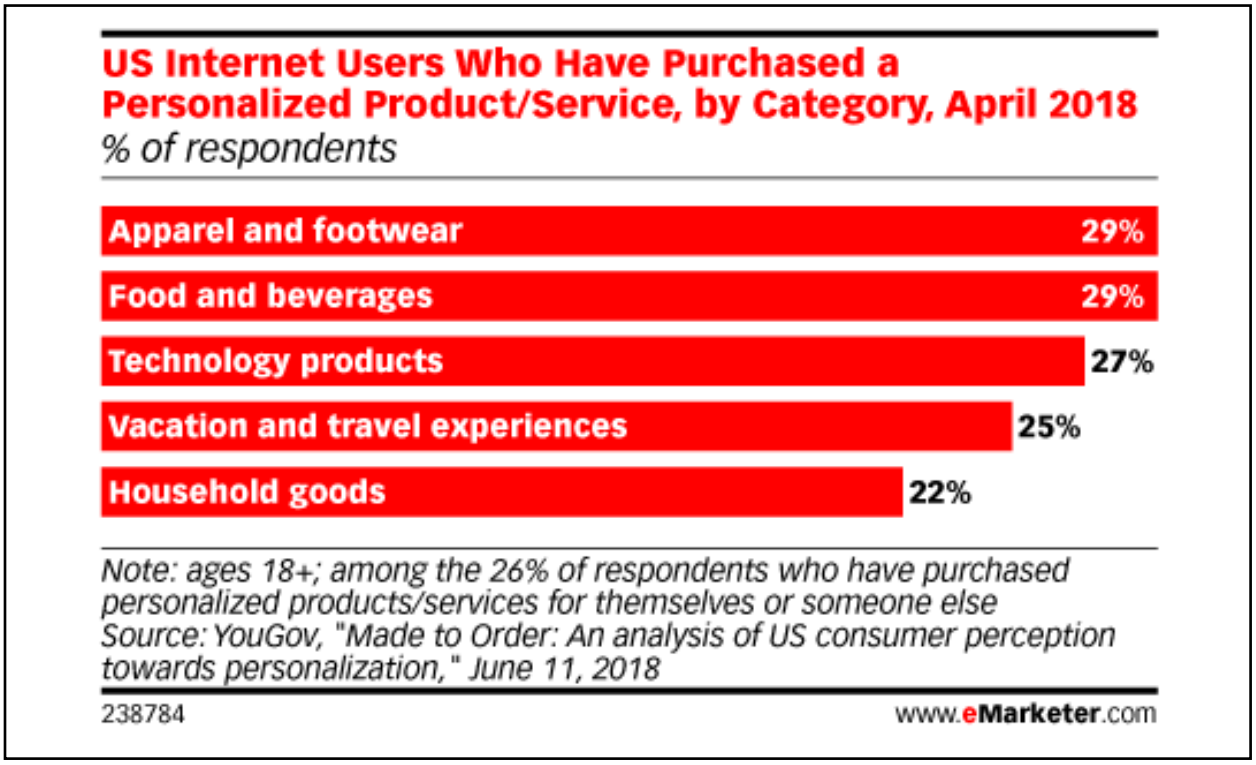


Figure 7. US Internet Users Who Have Purchased a Personalized Product or Service, 2018

According to Kanchana Dissanayake, reporting on the results of a 2019 study exploring mass customization as a way to enable sustainability in fashion, “major sustainability benefits of the (mass customization) strategy are identified as improved relationship between the product and the consumer, extended user phase of clothing, waste minimization, enabling eco-friendly printing technologies, enabling repair, reuse, or recycling models, enhancing consumer

awareness regarding sustainable fashion, and moving from global to local production." (Dissanayake, 2019)

Dissanayake concludes that, while "mass customization still offers challenges to the producer in the operational phase, further advancement of technologies and growing consumer desires on personalized products would make this a viable business model that brings positive impacts to the business in economic, environmental, and social perspectives." (Dissanayake, 2109)

Individuality and Diversity. The 2019 study, "Psychogenic Antecedents and Apparel Customization: Moderating Effects of Gender," examines how "behavior-inducing psychogenic needs" (such as the need for uniqueness, for self-promotion, and for social identity) influence the way individuals perceive apparel customization. According to the researchers, these behavior-inducing needs lead "to buying intention of customized apparel products. Further, to identify whether gender plays a moderating role in the relationships between those psychogenic needs and the perception of apparel customization" (Seo & Chunmin, 2019).

The growing acceptance of gender fluidity has created a consumer need, especially among the millennial and younger generations, to focus on individuality in fashion – in contrast to more traditionally gender-defined fashion items. In the past, androgynous fashion has been far more prevalent on runways than in the actual marketplace, but, with the rise of customization, more and more contemporary consumers have become increasingly interested in more individualized, personalized and androgynous garments, in contrast to more gender-based mass-produced items. As Lam has observed, "Companies and brands aiming to intrigue younger consumers need to embrace individuality, diversity and inclusion – which can be realized by

creating an open conversation between brand and consumer and showing respect to the things they value" (Lam, 2020).

Contemporary Attempts to Promote Resale

"The only true sustainable way to shop is to not shop at all," Rachel Kibbe, a brand consultant for circularity and sustainability in fashion, told Business Insider's Sam Corbin. "Unless you're buying clothes that [already] exist" (Corbin, 2020). Second-hand economies have recently been the subject of a growing body of research in several overlapping disciplines, including anthropology, history, geography, and sociology (Brewer, 2002). Reusing and reselling allow for the opportunity to refresh or recreate, making the old into new. There are several channels through which resale has grown in the last generation.

Resale is a relatively small fraction of the overall apparel market but is growing 21 times faster than sales of new clothes. GlobalData, an analytics firm, predicts the market, including resale sites, thrift shops and other venues, will reach $50 billion by 2023 (Kent, 2020). See Figure 8 below.

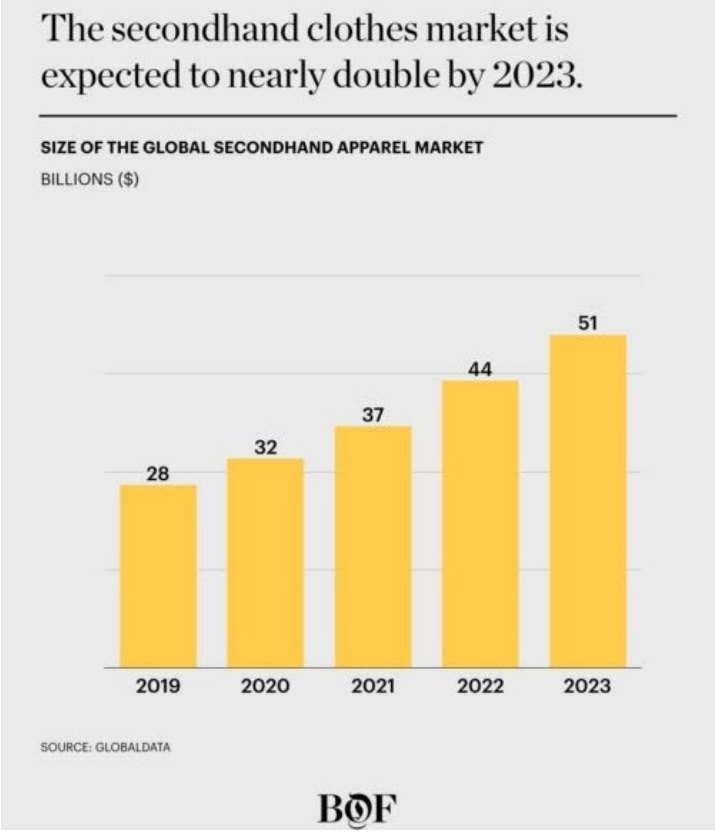


Figure 8. Secondhand market growth

Second-Hand market. The Second-Hand market is not a new economic model. As Hansen and Le Zotte have observed: "Secondhand economies paralleled and overlapped general economic exchanges, and all these processes have changed markedly with the rise of global capitalism. Similarly, styles visibly reliant on secondhand consumption have long reflected and affected firsthand fashion, and now advance alongside the acceleration of firsthand 'fast fashion.' fueled both by a superfluity of goods and a desire to counter top-down cookie-cutter trends." (Hansen and Le Zotte, 2019)

In the past, the majority market share for used clothing was controlled by non-profit organizations like Goodwill and Housing Works, as well as independent consignment stores,

pawn shops, and used clothing stores (Waxman, 2018). However, in the last few decades, the emergence of new communications technology has created various types of new opportunities for the resale and redistribution of clothing -- from scaled franchises like Beacon's Closet and Buffalo Exchange, social media marketplaces, to larger online exchanges like Ebay or ThredUp (which promotes itself as 'The Largest Online Thrift Store and Consignment Shop').

The designer market has also embraced secondhand online sales, with The Real Real and Vestiaire providing opportunities for users to buy and sell through a secure and authenticated channel. As evidence of this new hybrid of luxury and secondhand, The Real Real describes itself as a sustainable luxury company, honoring heritage brands and extending the life-cycle of luxury items (The Real Real, 2020).

Awareness and acceptance of the second-hand market is growing and being acclaimed through unique channels. In 2013, Macklemore and Ryan Lewis's hit song 'Thrift Shop' portrayed secondhand economies as a way of consuming creatively and smartly, of curating personally associated objects by buying off the beaten path (Hansen and LeZotte, 2019).

Upcycling. Upcycling, another major trend in conscious consumerism, represents an intersection between resale and new goods. At Etsy, many brands repurpose used goods or make sustainable small-batch custom products. The company also includes information about net zero and sustainable products as part of its branding strategy (Peters, 2019).

Recently, second-hand has become an umbrella feature for several brands. Volume retailers Macy's, and J.C. Penney, along with Madewell, have partnered with ThredUp to improve resale presence. Nordstrom has also created its own resale section through which it controls its own resale branding message.

Analysis of Clothing Fit

According to Couch, "Fit is often the discrepancy between causation and correlation for statistical analysis in fashion. Fit and consumer behavior are sometimes neglected when interpreting data and the results have consequences" (Couch 2018). The mass-production model at the center of the fashion industry and the instant gratification needs of consumers that it serves have placed far more importance on speed than on fit. In one glaring example of the indifference to fit, the executives at Forever 21 once confirmed 400 patterns were confirmed in a single day (Kim and Wang, 2019).

Tailoring. The modern tailor – defined as the individual who makes, repairs and/or alters clothing – began in the eighteenth century (London Fitting Rooms, 2016). In the late 1800s, Charles Frederick Worth became one of the first designers to develop products that were not sold individually. The rapid success of this practice of displaying models in garments that then were sold to consumers inspired other designers to adapt the same practice, including Yves Saint Laurent (London Fitting Rooms, 2013).

Currently, the landscape in which clothing is made and repaired consists of several different models. Haute couture, for example, is handmade in every detail to the designer's specifications. In contrast, Bespoke tailoring refers to clothing made according to the buyer's specifications, while made-to-measure clothing is made from an existing pattern (fibre2fibre, 2013).

Fast Fashion and Fit. By the 1960s, most garments purchased by consumers were ready-to-wear items, which were mass-produced in factories for the general market. Ready-to-wear garments are made in factories in specific sizing blocks based on a fit model and graded into larger and smaller sizes, with the goal of adequately fitting as many body types as possible. With garments sold in stores off the rack, people were able to more quickly make purchases, rather than submitting to the more time-consuming practice in which each customer placed and had to wait for the completion of an individual order. In practice, the overall effect has been an imperfect fit for everyone.

According to Meghan Litchfield, the CEO and founder of FashionUnited, "The fundamental problem with women's clothing is that the industry assumes women's bodies are standard, and our bodies are far from it." Litchfield explains that chronic problems with sizing perpetuated by mass-market production have led to excess waste within the fashion industry due to the overproduction of size runs, as well as high return rates that can be costly to the brand. In addition to the mistake that all women have standard body types, Litchfeld further observes, "there are no standard sizes across the industry, and measurements vary wildly across brands, making sizes arbitrary" (Turk, 2019).

Fast fashion has created a wider gap in sizing, building one-size-fits-all models or using elastic or drawstrings to allow for a wider audience of sizes. As a trend, stretch materials and looser fits have become commonplace through technology. It is unclear if the fitting trends come from the need for faster fashion turnarounds or if fast fashion has created so much loose-fitting clothing that it has become commonplace and therefore trendy (CB Insights, 2019).

According to a recent survey conducted by Bodylabs, 58 percent of shoppers report that they would buy more frequently if they could ensure a proper fit (Couch, 2020). Whatever their motivations, more and more consumers are beginning to purchase with the criteria of fit as well as trend.

Alterations While there is currently little research on the analysis of the evolution of the practice of clothing alterations throughout history, fashion and low-cost clothing appear to be major factors in the reduction of clothing alterations, which has subsequently resulted in a reduction in industry experts and apprentices. Another reason for the recent reduction in alterations is that altering clothing can often be more difficult than sewing new garments, especially if the original workmanship is poor. “New clothes start with freshly measured and cut pieces, and are assembled in a pre-defined, efficient order. Altering clothes takes time to review the construction, take apart a section of the garment (or sometimes the entire garment), make the alteration, then reassemble it correctly for the right fit” (Vanessa, accessed 2020).

Off the rack clothes are made without the intention of alteration, with reduced seam allowances or the use of low-quality materials making it difficult if not impossible to adapt or repurpose many mass-produced fashion items. Other factors that discourage alterations are price point and value (Roes, 2013). It’s difficult, after all, to rationalize spending $75 on alterations for a garment originally purchased for $20. The lack of transparency of quality and fit also leave consumers confused about whether or how long the pieces they purchase will last. According to an IBISWorld Industry Report on Clothing alteration services in the US, 32 percent of alterations are made on professional and formal attire. According to the same study, 22.6 percent of the alterations are hems, 11.5 percent are waist adjustments, 17.3 percent are for sleeve shortening, 9

percent are specialty garment care and maintenance, and 7.6 percent are other services (IBISWorld, 2019).

Consumers now expect that all aspects of clothing purchases should be much cheaper, including alterations. There are currently no standards and benchmarks for alterations pricing and no big players that are leading the charge for pricing (IBISWorld, 2019). Clothing alterations shops now compete with businesses such as dry cleaners and department stores, which have added alterations services in order to create more convenience for their customers (IBISWorld, 2019).

Emotional triggers around fit. There are several factors that surround how individuals feel in their clothes. Fit, while logically objective, can be subjective based on externalities such as other opinions, self-esteem, and personal preference. In the study, Consumer Behavior Characteristics in Fast Fashion, Tina Yinyin Wang asked consumers, "When you are fitting or considering about a garment, (if) a stranger who's also shopping comes to tell you that he/she think it fit you well, will it influence you even more than the people you know? It can be found that the influence of strangers during shopping is more significant than we may estimate." (Wang, 2010)

A 2012 study showed that women who are depressed or sad are more likely to wear baggy tops, jeans, and a sweatshirt or jumper. Women who are happy or positive are more likely to wear a favorite dress, jewelry, and jeans. According to the study, 96 of the 100 women surveyed "believed that what they wear affects how confident they feel" (Weaver, 2012). While the study claims a lack of effort as an aspect of this behavior, another perspective from the Anxiety and Depression Association of America alleges that 1 in 50 people suffer from body

dysmorphia - a disorder characterized by a constant pre-occupation of imagined or perceive defects - and that there is, in fact, a considerable effort to camouflage or hide behind clothing (ADAA, accessed 2020)

Social media is another important factor in determining the relationship between how women feel and what clothing they wear. A 2017 study examining the effects of social network site (SNS) use on self-esteem demonstrated that SNS use affects users' self-esteem in multiple and complex ways. Findings indicate that using SNSs for social comparison has negative effects on users' self-esteem, whereas receiving positive feedback such as likes and comments through social media or engaging in self-reflection is associated with elevated self-esteem (Krause et al, 2017).

Wellness and the future of fashion. The growing trends in fashion of wellness, athleisure and sustainability have provided a canvas to create a future for fashion that is intelligent and thoughtful (McGroarty, 2019). In the article Well Fashion – Way Beyond Athleisure, Beth McGroarty reports on the 2019 Global Wellness Summit, expanding upon a new era of sustainable, ethical, intelligent, healing, and more inclusive and meaningful clothing. In Figure 9 below, describes the integration of wellness throughout the entire fashion industry cycle.

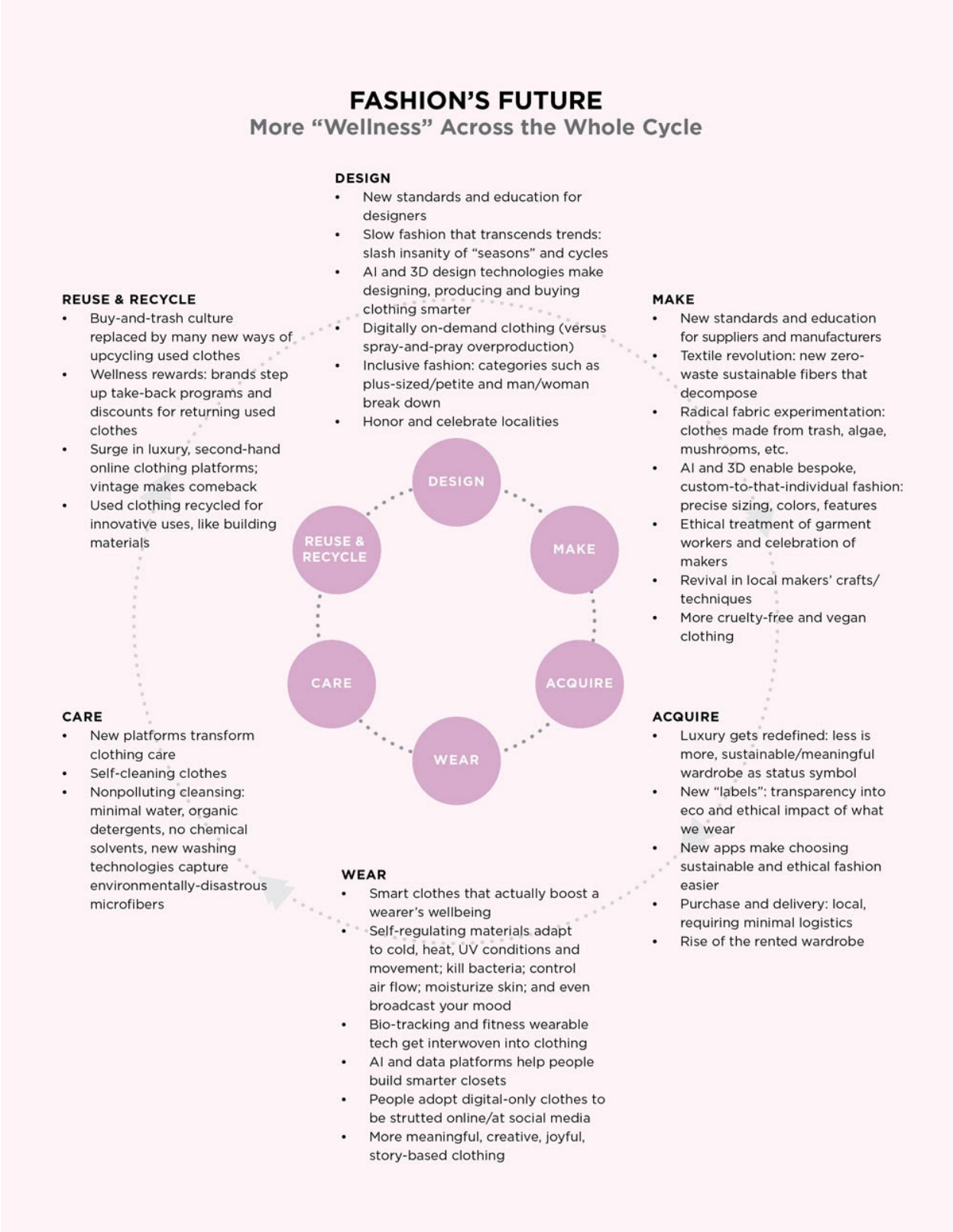


Figure 9. Fashion's Future - Wellness in circularity

Topic, Hypotheses, Research Objectives and Who will Benefit

Study topic. The topic of this dissertation is accessible clothing alterations and customization as a means of integrating sustainable practices and meeting a range of consumers' needs, including body-type and size inclusivity and increased individualization to enhance self-esteem and garner self-advocacy.

Hypotheses. The study's hypotheses include:

- Education and marketing focusing on sustainability and conscious consumerism have made consumers more aware of the environmental and social impacts of fashion purchasing. The incidence rate of consumers altering and customizing apparel has steadily decreased.
- Consumers are apprehensive of altering and repairing clothing and the market is underutilized.
- Current alterations, repairs, and customization have been siloed and pigeon-holed to special occasions, work wear, and luxury goods.
- The current consumer landscape for alterations and repairs is partially the result several dynamics, including: fast fashion; consumers' preference for purchasing over repurposing; apprehension resulting from the absence of standards and benchmarks for alteration pricing; inconvenience: and consumers' increasing expectations of instant gratification as result of on-line purchasing and product delivery time.

- Based on an understanding of consumer needs, there is an opportunity to reintroduce a new model of alteration and customization services and address all barriers identified above.

Research objectives. The specific research objectives are to identify and understand:

- Target group consumers' and industry professionals' perceptions, attitudes and reported behaviors towards their owned apparel and alterations.
- The level of consumers' and industry professionals' perceived need to address:
    - issues of size and fit inclusivity.
    - relationship to their owned apparel.
    - integrating sustainability into their apparel purchasing and care behavior.
- Consumers' level of receptivity and perceived need for new and accessible alteration services.

Who will Benefit. The research will benefit consumers, consumer advocates, sustainability advocates and providers of alterations within the fashion industry.

- Consumers will benefit with improved self-esteem, a sense of inclusivity as well as individuality through increased awareness, education and accessibility around customization, alterations, fit, and fast fashion.
- Providers include designers, artisans, and alterations technicians.

Chapter III: Methodology

Overall Research Design

In order to meet the stated objectives, a mixed-method qualitative and quantitative research design was utilized. Qualitative research involved in-depth individual interviews (IDIs) with professionals who work in the fields of fashion and sustainability. Quantitative research consisted of an online survey with consumers regarding perceptions and attitudes of apparel alterations and customization.

Qualitative Research: In-depth Individual Interviews (IDIs)

In order to explore industry professionals' perceptions and attitudes towards sustainability, customization, and alterations, nine semi-structured in-depth individual interviews (IDIs) were conducted with professionals in the fashion industry. The interviews focused on experiences within the fashion industry and explored respondents' relationship to fashion, fit, alterations, and customization. The interviews were also designed to provide insight on the viability of new customization and alteration business models as a viable solution to increase sustainable practices and enhance customer self-esteem.

Sampling and Recruitment. Interviewees were selected based on their profession, position, and experience in the fashion industry. All interviewees were recruited by the researcher based on existing relationships. The interviews were conducted between February 4, 2020 and February 28th, 2020.

Sample profile.

Sex. All nine participants were female.

Professional role and position. All nine interviewees work in the fashion industry and represent a variety of roles and areas of expertise. The sample included:

- Four (4) Company Founders (Designers and Stylists)
- Two (2) Marketing Executives
- Three (3) Industry Analysts and Consultants

The interviewees are listed below:

Participant 1, Founder and Designer, Campbell and Kate; inclusive shirt brand

Participant 2, Marketing Strategist and Plus size influencer, Luminary

Participant 3, Founder and Stylist specializing in plus size, Copper & Rise

Participant 4, Global Business Development & Branded Partnerships, Luminary and Entrepreneur

Participant 5, Fashion and Apparel Executive, Professor and Industry Consultant

Participant 6, Founder, Body Data and Fit Tech Consultancy, Luxor & Finch

Participant 7, Founder and Designer, Zhe Transgender Lingerie

Participant 8, Founder and Stylist, Elevated Style by Aliya

Participant 9, Executive Director, Industry Analyst & Client Development, Fashion Footwear & Accessories, NPD Group

Consent and confidentiality. In alignment with the Glasgow Caledonian New York College Internal Review Board guidelines, the participants were informed of the study's purpose; the researcher received consent for participation and to audio record the interview via a smartphone; and participants were notified they would be quoted anonymously [Please see Appendix A for Informed Consent Form).

Interview guideline. The researcher prepared interview guidelines based on the interviewees' specific fields of expertise [Please see Appendix B: Interview Questions]. The interviews were conducted in a semi-structured format with the interview questions serving to structure the conversation and ensure all intended questions were answered. The semi-structured format allowed for an open dialogue that enabled access to information the researcher may not have thought to ask originally and background of the interviewee the researcher may not have previously known.

Procedure. All interviewees were contacted and recruited by email. Six of the interviews were conducted in-person. Three interviews were conducted via video calls (Zoom and Google Chat). All interviews were audio-recorded via the Voice Memo app on the researcher's mobile phone. All interviews were twenty to thirty minutes in length. The interviewees were not provided with the questions in advance.

Analysis. The qualitative data collected during the IDIs was analyzed using thematic content analysis. In order to analyze the interview data, the researcher reviewed the audio and marked key words and themes. The researcher then identified themes and opinions consistently reported across interviews.

Quantitative Research

In order to explore consumer's awareness, perceptions and preferences around alterations, a quantitative survey was conducted with 165 individuals.

Sampling and Recruitment. Respondents were recruited by the researcher to represent the full range of sex, gender, household income, and age. Respondents were recruited via Facebook, email and text messages through the researcher's personal contacts as well as requests for forwarded referrals.

Sample profile. The survey was completed by 165 individuals.

Gender and Sex: 92% female, 6% male, 1% other

Age:

- Two age groups were predominantly represented:

  49% were between the ages of 35-44

  36% were between the ages of 25-34

- The remaining respondents fell within the following age groups:

  7% were between the ages of 45-54

  3% were between the ages of 55-64

  2% were between the ages of 19-24

  1% were 65 or older

Household Income.

- One income range was predominantly represented.

51% made $100,000 or more

18% made $50,000 - $74,999

13% preferred not to answer

12% made $75,000-$99,999

3% made $25,000 - $49,999

In sum, the majority of respondents were female, between the ages of 35 and 44, and made over $100,000 annually.

Consent and confidentiality. Each participant was informed of the study's purpose; all responses are stored online requiring a two-step verification security process, aligned with the Internal Review Board guidelines. The participants were informed that their individual responses were confidential, and all answers provided a prefer not to answer or other option.

Survey instrument. The ten-question survey was developed by the researcher [See Appendix C for the Survey Questions]. All questions were multiple choice with an option for an open-ended answer. The survey was completed online on Typeform, requested by email, text message and Facebook.

Procedure. Potential respondents received an email or text message from the researcher asking them to participate in the survey. They were provided a brief description of the research, assured confidentiality and informed that participation was voluntary. They were advised that it would take approximately five minutes to complete the survey.

Analysis. The data was analyzed using descriptive statistical analysis by question. Moderating effect analysis was conducted by reported participation in an experiential marketing event. The open-ended questions were analyzed using thematic content analysis and rate of frequency.

Limitations

The research was limited in that there was not a balanced mix of male and females. All IDIs were conducted with females and 92% of survey respondents were female. In addition, the survey sample profile shows that there was not an equal representation by income or age.

Chapter IV: Findings and Analysis

Introduction

Data from the in-depth interviews and survey were analyzed to identify recurring themes. The findings are organized and presented in two main categories: Qualitative Industry Expert findings and Quantitative Survey Consumer Findings. The Findings section is organized as follows.

- Qualitative Industry Expert Findings
- Quantitative Survey Consumer Findings

Qualitative Industry Expert Findings

The nine industry experts interviewed represent several areas of the fashion industry. Two interviewees were fashion designers - one was a shirt designer focused on button-downs for large busted women; the other created a lingerie line targeted at transgender consumers. Another interviewee, an entrepreneur in the sustainability space with a background in experiential marketing, gave valuable insight to consumer experience as it relates to sustainability in fashion. Another worked for a large market research company specializing in fashion and spoke about macro trends and experience based purchasing. Two interviewees were stylists and specialized in providing value to their customers through a styling process that spanned understanding specific consumer apparel needs and addressing those needs by creating collections through their own

wardrobe, alterations of existing items, and new purchases. Notably, both stylists had similar processes, but different target consumers and approaches. One interviewee, in addition to being a Marketing Strategist, was a Plus size influencer, providing both personal and professional insight into emotional triggers around fit in the fashion industry. The final two interviewees were technical experts in fashion: one in fit and technology, the other in fashion materials and sustainability.

Interviewees responded both as consumers and fashion industry experts and observers. The findings below incorporate both levels of interviewee responses.

Based on all the interviews conducted, recurring themes were identified and are reported below. Each theme is reported in detail including the frequency of response across interviews.

1. Sustainability, Awareness, and Impact: There is an increased general consumer awareness of sustainability, however sustainability is not driving consumer fashion behaviors. All interviewees practiced sustainable enterprises whether recycling, donating clothing, or a minimum use of straws and other environmentally damaging products.

When asked how they shopped personally, one stylist mentioned second-hand as a "sport" where she found diamonds in the rough, but when asked if she took her clients to resale shops, she said it would be too difficult in the time allotted to shop with so few standards. While she considered it to be a sustainable practice, she did not claim that to be her reason for shopping resale.

Though awareness in sustainability has increased, the majority of interviewees did not prioritize sustainability in their fashion purchasing decisions. Both designers said that while they

made thoughtful decisions in their designs - one creating custom shirts for large busted women and the other creating lingerie for transgender consumers - they did not make those same decisions for their own purchases. Both mentioned Zara as a place they shop as a quick and affordable way to find apparel. One mentioned a time when she ran into Zara to find an outfit for an event she was attending that same day. The other mentioned that she had gained weight and did not want to invest in pieces that she did not plan to keep.

The plus size influencer said that as a younger consumer, there were no options for her as she did not fit into standard sizes and had been forced to make her own clothing or shop in vintage stores to find apparel that fit her body type. When asked if she thought about making clothing and shopping vintage as sustainable decisions, she said that was the first she had really thought about it in that way. She realized vintage was a way to shop sustainably, but that was not the reason she did it. She had not considered pattern making and creating clothes to be sustainable until prompted.

Both designers claimed that they did not consider their custom clothing brands sustainable solutions; both claimed they saw individualized fit as a problem solved, but had never considered proper fit to be a way to keep clothing longer and therefore make it sustainable.

One interviewee, a founder of a fashion fit tech consulting agency, had a vast education in fit and spoke of matching people to product through fit. Her key performance indicators were reducing returns and increasing customer loyalty. When asked if she thought this was a sustainable practice, she had considered it, though her priorities in building her consulting agency were body positivity, inclusion, and the business case for proper fit. She was further prompted if she had used sustainability as a driver with a reduced carbon footprint as well as

extended clothing life through perfected sizing and an emotional connection to pieces that fit well. She said she had considered, but not thought too much about the messaging of sustainability in her marketing strategies. She did however, speak about saving companies money through proper fit reducing material waste.

Only one respondent reported making sustainable choices in her fashion purchasing decisions. Notably, her background is in sustainability in the fashion industry and she had recently received a Master's in Sustainability. For the purposes of this study, this interviewee is being considered an outlier.

This finding supports the hypothesis that education and marketing around sustainability and conscious consumerism have made consumers more aware of how their fashion purchasing impacts the planet. However, while consumers are aware that making decisions through a lens of sustainability will improve the planet, it has not gone so far as to fully impact their fashion purchasing decisions.

2. Convenience: Convenience is a main factor in purchasing decisions. When asked what motivated purchasing decisions, the overwhelming response was convenience. Only two interviewees specifically stated convenience, but all interviewees implied convenience through the way they described their shopping experience. Other terms used were time saver, easy, and quick. The stylists, in their professional capacity, both said that clients come to them as they don't have time to create outfits that feel put together for their demanding jobs. The stylists charge thousands of dollars (not including clothing purchases) to help clients create wardrobes and a look-book of outfits that they can use to dress efficiently while feeling empowered and put together.

While price mattered somewhat, it was the accessibility to fast fashion whether running into Zara before an event or knowing that Target had everything in one place that was the biggest draw for the consumer. One interviewee talked about Zappos as an omnichannel experience that allowed her to buy and return with ease through their chat bots, online service, and over the phone options, making her experience more seamless and prompting her loyalty to the company. Omnichannel is a strategy organizations use to provide branded content across all channels of their distribution to improve the user experience.

This finding supports the hypothesis that based on an understanding of consumer needs, there is an opportunity to reintroduce a new model of alterations and customization services to address barriers such as inconvenience.

3. Brand loyalty based on fit: Consumers report high brand loyalty based on reliable fit. Fit was another recurring theme for all interviewees impacting their purchase as well as where they chose to shop. An undertone in every interview, fit provided a standard benchmark to gain loyalty.

Several interviewees went to specific stores, stating that they had picked brands based on best fit. One interviewee said that due to her more informal work attire, she gets less tailored and the casual items she wears fit off the rack. However, she also mentioned that she had recently found casual items in her wardrobe that would benefit from alteration. In addition, she mentioned that sizing is more inclusive than it had been before; fitting her petite frame.

The Plus size influencer talked a lot about fit in her purchasing decision, shopping with brands that had her size such as Eloquii and Veronica Beard. She said that recently more brands

have her size in her aesthetic. Previously she found the plus size market to be dull and unappealing, not promoting a curvy figure.

Both stylists, in professional and personal capacity, considered fit to be an important part of the styling process. One stylist mentioned shopping with clients at Nordstrom due to their variety. She also mentioned the ability to call a tailor through smart technology in the dressing room. Her mission as a plus size stylist was to find the right fit for her clients no matter their size.

Two interviewees talked about using Rent The Runway on occasion, both stressing that they were too short to fit most of the designs and still had to focus on brands they knew might fit them. In addition, the fashion industry analyst said that she had a friend who had hired a tailor to tack or create a removable hem to one of her pieces. She said she had not done so herself but found that the fit was a barrier in her using the rental model more often. The designer had stopped using the model altogether as she had several experiences in which clothing she rented did not fit correctly.

One designer, having said she had recently gained weight, used her size as an excuse to shop fast fashion, claiming that she hoped she would not need the clothes for long. When asked if she considered purchasing quality and altering as her size changed, she said it would be too complicated and expensive and she would prefer to wait.

These findings support the hypothesis that consumers are apprehensive of altering and repairing clothing and the market is underutilized. The findings also support the hypothesis that based on an understanding of consumer needs, there is an opportunity to reintroduce a new model of alteration and customization services and address barriers such as accessibility and

reliability as well as transparency in pricing. The findings are inconclusive regarding the hypothesis that current alterations, repairs, and customization have been siloed and pigeon-holed to special occasion, work wear, and luxury goods.

4. Consumer Experience: Fashion marketing, selection and purchasing experiences overall are also main drivers in consumer fashion decisions: In reviewing the data. overall experience, including fit, convenience, and brand content all play a role in increasing customer loyalty.

All interviewees were asked about their shopping preferences with regard to quality, price, and fit. The recurring theme was that all had value in creating the overall experience. One interviewee talked about Target as a place she could do everything she needed in one place. Her major value add was that she could bring her young daughter and buy her a toy or clothes while also shopping for herself. Another interviewee talked about luxury and the stories behind what she bought. She spoke of a luxury bag she'd had for years and had searched on Etsy to find a designer that would paint it to provide a fresh look to something that held sentimental value, but was dated. While she sometimes shopped for needed items, she enjoyed the overall experience of shopping when she had the time to do so.

The influencer spoke about a brand, Veronica Beard that had recently launched inclusive sizing that she had been given the opportunity to promote through an event in their flagship store. She was able to tell her own story growing up feeling like she didn't fit into the fashion mold and how she had overcome adversity through confidence, her ability to create her own fashion styles, and how stores like the one she was representing were creating body positive apparel. She said that the brand provided her a platform to tell her story and support her and that

she would continue to buy clothes and promote the brand because of the positive experience. She also mentioned how the fit of the clothes was a factor in her decision to promote the brand.

One interviewee said, “I don’t mind paying high prices if I feel that I’m getting something good and I’m going to wear it a lot.” The same interviewee had contradicting statements as she also shopped frequently in fast fashion stores. When asked to expand upon her purchasing decisions, she said that her choices would depend on the time she had to shop and what she was wearing it for. The interviewee had spent several years as a designer after being a lawyer and was going back into law part time. She said that while she had been able to “shop her own closet” for her interview, she would purchase new pieces and spend more time finding quality items for her new position.

This finding supports the hypothesis that the current consumer landscape for alterations and repairs is partially the result of fast fashion and consumers’ preference purchase over re-purpose; inconvenience; and increased consumer expectations of instant gratification as a result of on-line purchasing and product delivery. This finding also supports the hypothesis that based on an understanding of consumer needs, there is an opportunity to reintroduce a new model of alterations and customization services and address barriers such as inconvenience and consumer expectations of instant gratification.

5. Alterations and Customization: The practice of altering and customizing apparel is not a consumer priority or perceived as a sustainable solution, nor is it reported to be a “pain point”. Though a common theme of the interviews was an awareness of sustainability in fashion, few considered it in their fashion purchasing as described above. In analysing the interviews, it was noted that while interviewees were aware of sustainable fashion, they did not

consider alterations and repairs to be a sustainable practice until prompted. Several interviewees carried out alterations but did so on an as needed basis rather than to create or customize to extend the life of their clothing or instead of purchasing new.

Out of the nine interviews, five interviewees had to be prompted before mentioning alterations as a service they have used as a part of their routine. The interviewees that talked about alterations were the fashion industry professor, the plus size influencer, and both stylists in a professional capacity. To prevent the need for alterations, most interviewees claimed they found stores with items that fit them. However, once prompted, all interviewees spoke of the importance of alterations. There was mention that the fit of a garment was valued in purchasing, but one interviewee said if it fit well enough, that they wouldn't carry out alterations.

Most interviewees mentioned going to the dry cleaner or, in the case of the two designers, using their own employees or adjusting garments themselves. No interviewees had tailors they used regularly. All alterations, done on an as needed basis, were considered an errand rather than an experience and important. Both stylists, during the process of reviewing clients' wardrobes, created a keep pile, a donate pile, as well as an alterations pile. Both were asked if they followed up with the alterations and both said that while they followed up on the experience as a whole, left it to the client to find a service and carry out the alterations on their own. In addition, one stylist also created what she called a nostalgia pile. These were pieces that were either irreparable or the stylist thought did not address the client's needs, but clients were not ready to give up yet due to sentimental value. Asked if she recommended they use the garments to upcycle, such as a scarf, a pillow, a piece of art, or even a dog outfit, she said she had never thought to suggest it and would consider doing so in the future. The other stylist, asked the same question, said, "I'm not a maker. I'm great at putting things together, but when it comes to stuff like that, I'm just not

sure what to do." She was further asked if she would be open to a business that provided this in addition to convenience and accessibility to alterations services and she said she was eager about the prospect of providing the same kind of experience to alterations as she does to the styling process as alterations are an important part of what she does.

After questioning one designer about her custom shirt company and its significance in sustainability through repair and customization, she was compelled to consider having customers send back buttons in order to re-use for new shirts or use contrasting materials to adjust collars and cuffs, the most common part of a button-down to be damaged first.

These finding support the hypothesis that based on an understanding of consumer needs, there is an opportunity to reintroduce a new model of alteration and customization services and address all barriers above including preference to purchase over re-purpose; consumer apprehension resulting from the absence of standards and benchmarks for alteration pricing; and inconvenience.

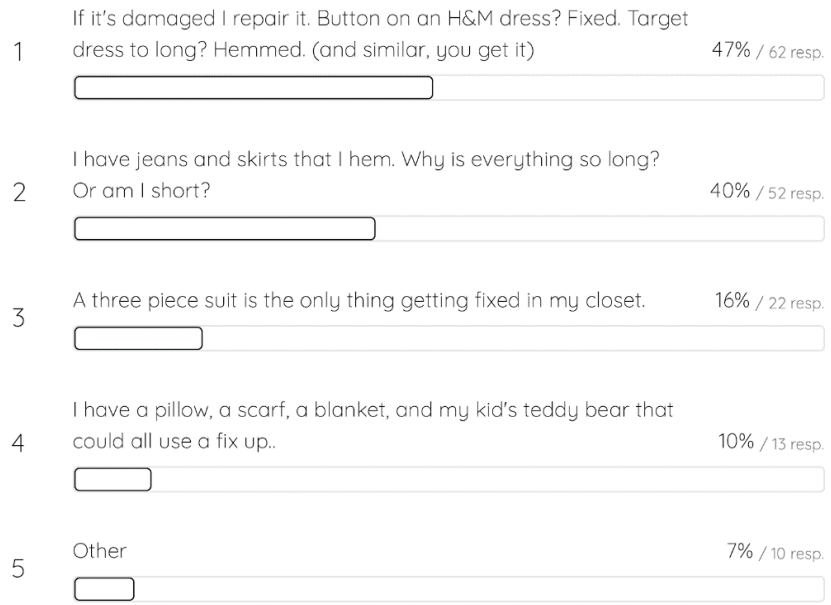
Quantitative Consumer Survey Findings

The findings from the quantitative consumer survey are reported by number and percentage of responses.

Occasions for Alterations. Findings indicate that consumers are aware of alteration services for a range of apparel categories with repair and button replacement (47%) and hemming (40%) being the two most frequently reported (see Table 4.1 below).

Table 4.1

Awareness of alterations types by percentage and number of responses



Responses to the *Other* option include the following:

- "Something stressful to do."
- "Alterations usually for cocktail dress. I've had a couple pairs of jeans (done)."
- "I typically repair more expensive items such as a winter jacket. Since I buy most of my clothing second hand if it's worn out or needs to be repaired I wear it until it practically falls off of me"
- "It's a hassle but I know I should do it."
- "I often will get my favorite shoes repaired or resoled 1-2x a year. Otherwise, I have only taken my more expensive clothing items such as gowns to be altered. If it was cheaper, I would get many more items altered!"
- "I never do alterations."

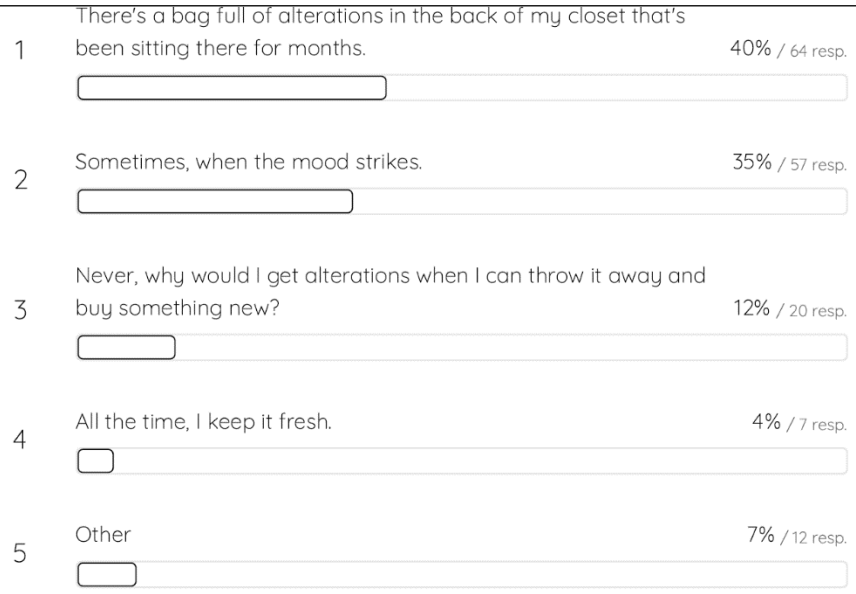
- "I try not to purchase things that require an alteration. When I damage something, it is usually beyond repair or not worth repairing. If I damaged an expensive item I would have it repaired."
- "If I buy and it just needs a small alteration, then I do it for sure."
- "High quality items worth maintaining or repairing an item I wear to death."
- "I alter vintage finds!"

Findings do not support the hypothesis that current alterations, repairs, and customization have been siloed and pigeon-holed to special occasion, work wear, and luxury goods.

Frequency of alterations and repairs. Findings indicate that there is a range in the frequency at which consumers report using alteration and repairs services. 79% of respondents indicate awareness of a need for alterations or repairs. However, only 4% carry out alterations regularly and 35% use alteration services infrequently and on an as needed basis (See Table 4.2 below).

Table 4.2

Frequency of alterations and repairs



Responses to the *Other* option support the findings in Table 4.2 indicating that alterations are postponed, ignored or done on an as needed basis. Responses include the following:

- "Only if needed… Weight loss, hem, etc."
- "Rarely. I usually don't buy it if it doesn't fit."
- "I try to buy clothes that fit me."
- "As needed."
- "I alter on an as needed basis which isn't very often since the inception of petite and short options for pants"
- "I don't really do it - occasionally."
- "Maybe two times a year."
- "Never. I haven't needed to alter clothing"
- "When I am buying new clothes that need adjustments."
- "Rarely"
- "When I have a dress for a wedding or special event."

- “Only brand-new stuff (when it) doesn’t fit quite right. I will put new heel tips on a favorite pair of shoes though!”

The findings are inconclusive regarding the hypothesis that consumers altering and customizing their apparel has steadily decreased.

Barriers to carrying out alterations and repairs. Findings indicate that there are several barriers when carrying out alterations. The most common barrier (50%) is price followed by a lack of access to alterations services (24%).

Table 4.3

Barriers to carrying out alterations and repairs

1	Tailors are too expensive for the small repairs I need.	50% / 78 resp.
2	I can't find someone in my area.	24% / 38 resp.
3	I don't even think about it. I just donate it.	11% / 18 resp.
4	I don't see any ads! how am I supposed to know where to go unless it's on Instagram?	11% / 18 resp.
5	I know how to sew and do it all myself.	9% / 14 resp.
6	Other	16% / 25 resp.

Responses to the *Other* option support the findings in Table 4.3 that barriers to carry out alterations are predominantly reported to be a lack of time in addition to a passive viewpoint. Responses include the following:

- "No real barriers."
- "Too expensive and too far away."
- "Making time to take it somewhere."
- "I don't have a major barrier, if I want something done, I bring it in."
- "Lazy."
- "Laziness."
- "I put it off although I could not do minor fixes myself. Not sure shere to go. Seems inconvenient. Don't use Instagram much though."
- "Time."
- "I don't make the time."

- “Time. I don’t have enough.”
- “Time to do it.”
- “I just don’t make the time.”
- “I don’t buy clothes that don’t fit me in the first place.
- “I forget.”
- “Time consuming.”
- “Work hours make it hard to get to a tailor.”
- “I don’t always think about it so sometimes I don’t even buy.”
- “Lazy.”
- “I know how to sew and do it all myself, so I feel like I should and then I don’t.”
- “Laziness.”
- “It’s hard to trust a new tailor. The search is difficult.”
- “I have 3 kids and life is busy.”
- “Logistics, I just have no time and they are all out of the way during my day.”
- “I don’t do it all myself, just the little things.”
- “I’m lazy!”

The findings support the hypothesis that the current consumer landscape for alterations and repairs is partially the result of the absence of standards and benchmarks for alteration pricing and inconvenience resulting in consumer apprehension to carry out services.

Factors that engender consumer use of alterations and repairs. Findings indicate that there the main reason consumers don’t carry out alterations and repairs is a lack of convenience (76%). Price the next most commonly reported reason (27%).

Table 4.4

Factors that engender consumer use of alterations and repairs.

1	Convenience, I have no time.	76% / 125 resp.
2	Low prices, show me the money.	27% / 45 resp.
3	My wardrobe is so cheap, I can just buy something new.	9% / 15 resp.
4	I'm so on trend, I don't keep my clothes longer than a few months.	1% / 2 resp.
5	Other	6% / 10 resp.

Responses to the *Other* option support the findings in Table 4.4 that convenience and accessibility play a prominent role in engendering the use of alterations and repairs. Responses include the following:

- “Really it's on me. I just get lazy about alterations and repairs.
- “If I had an event coming up.”
- “I can do it myself, so it’s all about timing.”
- “I never think about it.”
- “I don’t wait.”
- “Maybe an app that offers a service that comes to you, but not overly expensive.”
- “Combo of 1 and 2.”
- “I guess I do get shoes resoled sometimes if that counts.”

- “The right tools! I don’t have a sewing machine, so I have to do it all by hand. Time is also a factor.
- “Not sure where to go.”

The findings support the hypothesis that consumers are apprehensive of altering and repairing clothing and the market is underutilized. In addition, this supports the hypothesis that the current consumer landscape for alterations and repairs is partially the result of consumer apprehension resulting from the absence of standards and benchmarks for alteration pricing and inconvenience.

Chapter V: Discussion and Conclusion

Discussion

Consumer education and awareness seem like overused terms with limited and disappointing outcomes. For most people today, alterations are not regarded as a rewarding experience that could prevent waste while creating opportunities for personal expression, but rather as a tedious errand to be added to an ever-growing to-do list. In analyzing the data, however, it becomes clear that the alterations industry has done little to date to educate consumers about the connection of alterations to sustainability, though there have been a few positive developments. For example, Nordstrom has recently provided value and convenience to their consumers through expanded in-store alterations. In addition, the company has opened a series of service hubs called Nordstrom Local for online order pickup and returns and express alterations. Alterations can now be made to external purchases, but only at a premium price.

In spite of the high costs that Nordstrom charges for alterations, their recent actions demonstrate, along with the other examples provided in the research, that consumer education and awareness about sustainability through the lens of alterations and repairs – combined with the increased accessibility to convenient alterations services – can result in a greater interest in alterations and customization on the part of consumers. According to the qualitative interviews, an overwhelming 76 percent of respondents reported convenience and time as barriers to carrying out alterations, which are only done on an as needed basis. This and other data from the qualitative interviews suggest that consumers understand that purchases with valued features such as fit, aesthetic, and lastability are reasons to alter – but that the current lack of accessibility to tailors reduces their ability to carry out alterations.

Based on the backgrounds of the interviewees, it was assumed that sustainability would be a factor in the purchase decisions they make. While most of the interviewees sheepishly acknowledged making purchasing decisions without sustainability in mind, the research also suggests that they did not realize the potential that finding the right fit and extending the life of their clothing is itself a sustainable practice. This suggests that, in place of the current all-or-nothing approach to fashion sustainability, there is a real potential to educate and encourage consumers, both in and out of the fashion industry, to understand that, by making more thoughtful purchase and post-purchase decisions, they are contributing to sustainability.

Another important finding s was the importance of fit as a key factor driving both purchase decisions and brand loyalty. In the current shopping environment, respondents' determination to find products that fit properly tends to overshadow other considerations, including sustainability and environmental responsibility. The findings from the research suggest, however, that an increased availability and awareness of alterations as a routine part of the fashion market, can help consumers learn to focus on more purposeful drivers, such as aesthetics, personalization, and sustainability.

Contrary to expectations, price did not emerge as a major driving force in respondents' purchase decisions. Both of the designers included in the research reported that they were able to pay for whatever fashion products they desired, even if that meant additional expenses associated with brands providing more sustainable products or environmentally responsible business practices. According to the respondents, other factors, such as time and body image, were more likely to restrict their ability to make more thoughtful purchase decisions.

Findings from the research also revealed the importance of the convenience associated with fast fashion as a driving factor in purchase decisions and brand appeal. With their high volumes and profit margins, retailers like H&M and Zara are able to provide consumers with prime locations and greater accessibility and convenience in making purchases. The shopping experience itself also emerged as an important factor in respondents' purchase decisions, a factor that has allowed many brick-and-mortar venues, especially higher profile shops in metropolitan cities like New York, to continue to compete with the steadily increasing availability of more convenient online shopping services. In addition, findings from both stylists during the interviews indicated that clients will pay thousands of dollars for a styling experience, but when it comes to alterations, are left to complete on their own. Boths stylists were asked if they followed up with the alterations and both said that while they followed up on the experience as a whole, left it to the client to find a service and carry out the alterations on their own.

Alterations carry a unique value proposition. According to the data from the research, consumers believe that alterations are a value-add to the clothing they purchase. However, respondents report that they often fail to seek alterations because of a variety of factors, including the absence of standards and benchmarks for alteration pricing, the inconvenience of finding and traveling to sites where the alterations can be made, and the failure of existing alteration services to provide consumers with the type of enhanced shopping experiences to which they have become increasingly accustomed.

The interviewees reported that they are aware of sustainability and its importance in their fashion preferences and purchasing decisions – but that it does not currently affect their actual purchasing behaviors.. Several respondents indicated, however, that an awareness of the wastefulness of the fashion industry and the importance of sustainability has affected their

behavior in other ways, including donating clothing, recycling, and other forms of conscious consumerism. However, the qualitative interview respondents did not indicate an awareness of any connection between alterations/customization and sustainability. This finding suggests the potential to educate consumers about the connection of alterations and sustainability. The qualitative research also suggests, however, that, to influence consumer behavior in a meaningful way, it will also be necessary to provide consumers with a new model of alteration and customization services that provides consumers with the convenience, enhanced shopping experiences, availability, access and other perceived benefits that currently inform the preferences of many consumers for purchase over re-purpose.

As noted in the Literature Review, the practice of alterations was at one time ingrained in the "fabric" of clothing acquisition and social practice. Many consumers still give lip service to the importance of alterations, but in practice, consumers rarely take advantage of the option for alterations. However, currently available research data identifies a "white space" in the market, suggesting an opportunity to those engaged in the alterations business and other advocates of alterations and garment re-purposing to leverage the benefits of convenience, access, and experience to increase alterations and customization practices and provide a viable solution to reduce waste and the approximately 80 percent of discarded clothing that ends up in landfills.

Reflections on Methodology.

The results of the research allow us to identify several advantages and disadvantages in the methodology chosen for the study. The main advantage of the qualitative portion of the study was the privileged access to the talented and highly knowledgeable experts that were included in the interviews. Reflecting on the interview experience, all the interviewees provided valuable

insight, and the conversations were organic in nature with little need for prompting to encourage the interviewees to expand upon or clarify their responses. The primary limitation to the qualitative research concerned the balance of the sample in terms of gender and employment level. No individuals interviewed were male or identified as male, which restricted the balance of the insights and observations to a more female-focused perspective. In addition, all of the interviewees are employed in middle- and high-tier positions, which limits the scope through which insights and observations about the fashion industry were provided.

The quantitative study was also limited by demographic considerations. The majority of respondents were female and earned more than $100,000 per year, a factor which inevitably skewed the data regarding the respondents' accessibility to alterations. This may help to account for why 76.7 percent of respondents considered convenience and a lack of time as the primary barriers to carry out alterations, while only 27 percent of respondents chose price. Another limitation of the quantitative research was the age range of the respondents, with the majority of respondents between 25 and 34 years of age.

Another limitation may involve the instructions provided on how to answer the questions. Based on the nature of the overall responses, it appears that respondents may not have realized they could choose more than one answer to each question.

Another potential limitation was the lack of benchmark data to use in achieving a longitudinal understanding of changing patterns of the frequency with which consumers use alterations services. In the absence of a reliable benchmark with which to compare the data from the survey, it is impossible to make a conclusive inference to support or refute the hypothesis

that the incidence rate of consumers altering and customizing their apparel has steadily decreased in recent years.

A primary limitation in the design and implementation of the methodology was the pressure from the time-constraint of an impending deadline.

What further research is needed. Although there is currently an abundance of existing research around fashion in general, fast fashion, and several other fashion related categories, currently available research studies and other information about alterations are relatively limited in scope. While some historical data is available on alterations, further research, both in the US and abroad, would paint a more accurate history of how the industry has developed over the years. Based on the data gathered for the Literature Review, it appears that there is currently little interest among academics to follow the history of alterations, to understand why alterations and reparation practices have reduced over time, and examine the reasons why the craft has been neglected. While fast fashion has undeniably played a role in the decline of alterations, an identification and analysis of the other factors that have contributed to this decline would provide us with a more well-rounded perspective that could be used in reinvigorating the industry. Research should be done across all categories focusing on alterations. Additional research is particularly needed to identify and understand the barriers of carrying out alterations, including, but not limited to those barriers (lack of standards and benchmarks for pricing, inconvenience, lack of access and accessibility, failure to link alteration services with the enhanced experiences expected from the overall shopping process, overriding concerns about "fit") proposed in this dissertation. Further research would almost certainly identify additional barriers and, as a result, create more opportunity to reinvigorate the industry.

Conclusion

A very unexpected and life changing phenomenon has occurred while writing this dissertation. In February of 2019, Coronavirus (or COVID-19) was identified in Wuhan, China. When I was told I would not be traveling to China for my "day job," as I like to call my current life as a shoe designer, I felt enthusiastic relief. I would have more time to work on my dissertation!

I messaged with my colleagues and friends in China, with whom, after fifteen years of traveling there between two and five times a year, I had built some really solid relationships. Nobody I knew was in an infected area, and even though factories were closed, it was Chinese New Year at the time, a period when factories traditionally close for up to a month or more. I was accustomed to the downtime and eager to have the extra time to focus on my studies. So, I continued to naively go about my day-to-day routine.

Slowly, I learned that the virus was spreading. I continued to work through the panic, not understanding how dire the situation was about to become. Next, news arrived of the virus spreading to Italy and Europe. During this period, I continued to work on my dissertation and didn't have much time to speculate on the panic. I was too busy trying to change the world! I continued to find data supporting my hypotheses and, as a result, identified a clear "whitespace" in the market and a powerful value proposition for my newly incorporated business, alternew. Through accessibility and convenience to alterations and repairs services, my goal was to engender sustainable practices, improve body-positivity and inclusivity, and reinvigorate a dying alterations industry – all things which I still fully intend to do.

I was going to change the world. I am going to change the world. But it seems the world decided to make some changes, too – and to make them quickly. So here I am, writing my conclusion on a tv-tray in my newly created home office in my studio apartment in Manhattan. I've been resigned to – as the kids (and CDC) are calling it these days – social distancing.

I keep telling people how strange and conflicted I feel. As parents talk about learning to teach their kids at home; as freelancers begin to lose work with the drop in business; as elderly suffer from fear of being more susceptible to this insane virus; as friends speak of loneliness and uncertainty – I'm on the other end of the spectrum, working from home and benefiting from the time alone without distraction. I've got a kitchen full of supplies, a laundry list of things to do for my business, and time to more thoughtfully complete my dissertation. But the whole process is so eerie. I realize that next week, after the dissertation has been completed and submitted, I will inevitably end up succumbing to my own feelings of loneliness or despair or whatever feelings I'll have with this major weight off my shoulders. But for now, I continue to write.

And here's the thing – I have incredible friends and family who have been supportive through this endeavor. I have technology and can chat with my parents and my sister and my nephews all at the same time through any video conferencing app. And most importantly, I have a purpose. I no longer have to feel shamed by the dark underbelly of the fashion industry – because now I realize that I can do something about it. And when this is over, I *will* do something about it. I'm more certain of that than I've ever been. Just as I'm sure that we will all come out the other side of this changed. This will be a time that nobody forgets. In thirty years, we'll all be asking one another: "Hey, where were you for the social distancing of 2020?" We'll remember funny memes like this post by @gg_golnessa: "Have we tried unplugging 2020, waiting ten seconds, and plugging it back in?", or inspiring quips like a post by

@theshilpashetty: “When the Great Plague of London was going around in 1665, Cambridge University shut down and Isaac Newton was forced to stay home. During this time, he invented calculus, parts of optic theory and allegedly, while sitting in his garden, he saw an apple fall from a tree that inspired his understanding of gravity and the laws of motion.”

As soon as we’re allowed to physically rather than virtually engage with society again, many of us will be looking to be part of something. I have no words for the fatalities we’ll witness and the financial straits people will endure, but I can only do everything I can to make sure this doesn’t happen again. And isn’t that just what sustainability is? It’s not just a pretty dress made of organic cotton or a metal straw. It’s providing ourselves with things that can and will last. It's making sure our planet is here for generations to come.

I have so many conflicting feelings right now, but most of all, I feel truly grateful for having followed the path that has always felt sprinkled with breadcrumbs. And I hope that the dissertation I’ve written, the knowledge I’ve gained, and the blind optimism I’ve had for as long as I can remember will somehow make a positive impact on the people and planet I love.

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Appendix A – Informed Consent Form

GCNYC
Glasgow Caledonian
New York College

Application for Waiver of Written Informed Consent

Check all that apply to your research and provide explanations:

[__] 1. The research could not practicably be carried out without the waiver or alteration.
Explain:

[__] 2. The research involves no more than minimal risk to the subjects;
Explain:

[__] 3. The waiver or alteration will not adversely affect the rights and welfare of the subjects;
Explain:

[__] 4. Whenever appropriate, the subjects will be provided with additional pertinent information after participation.

5. Are any procedures involved for which written consent is normally required outside of the research context?

[__] Yes
[X] No

Name of Researcher

Nancy Rhodes

Signature of Researcher **Date**

Nancy C. Rhodes

[ ] Waiver Granted

[ ] Full committee Review required
[ ] Application rejected due to ethical violations

IRB Chair: **Date:** 1/31/20

Appendix B - In-Depth-Interview Questions

Interviewee prompt – Talking about clothing fit as it pertains to different brands and markets.

Shopping habits overview

How do you like to shop for clothes? – Online, in store, through a stylist or guide, Rent the Runway?

- What do you dress for? You can talk about your style or about the different roles you play as you move from work to dates or nights out.
- What impacts your purchase? Quality? Fit? Trends?
- Why do you shop that way? Is it easy, convenient, haven't thought about it?
- Favorite shops or brands? Why are they your favorite?
- Have these always been your favorite shops? Changed over time?
- Least favorite brands? Why?
- Do you have a memory of a favorite shopping experience? Least favorite? Why?

Closet Overview

How would you describe your closet? Small, big, bursting at the seams?

- Do you have a favorite piece of clothing? What did you wear it for? Have you ever had to fix it or make any changes to it? Have you thought about it?
- How often do you donate or get rid of clothes. Purge or piece at a time?
- What usually motivates you to get rid of clothes? New clothes? Season change?
- Do you think about sustainability and the life cycle of your clothing and what happens after you're finished with something?

Alterations

Do you get anything altered?

- Can you sew? Do you do any alterations yourself?
- Do you do alterations?

- Do you know if your favorite stores offer alterations services and have you ever used them?
- If you do alterations, what kind? Clothes, pillows, blankets?
- If none, what barriers do you have to getting alterations?
- Have you ever thrown anything away that you meant to get altered? Can you tell me how you came to the decision?
- What do you think are the advantages to getting alterations? Disadvantages?

Emotional Triggers

How would you describe your emotions as we've talked about the process of buying, wearing, and altering clothes?

- Mad, happy, excited?
- Excited – what would your advice be to someone who hates shopping? Why do you think someone would hate shopping?
- Mad – What would make you like shopping and buying and wearing clothes?
- Sad – Why do you think it makes you sad?

Appendix C – Consumer Insights Survey

165 responses

How regularly do you get alterations and repairs done?

160 out of 165 answered

1	There's a bag full of alterations in the back of my closet that's been sitting there for months.	40% / 64 resp.
2	Sometimes, when the mood strikes.	35% / 57 resp.
3	Never, why would I get alterations when I can throw it away and buy something new?	12% / 20 resp.
4	All the time, I keep it fresh.	4% / 7 resp.
5	Other	7% / 12 resp.

3/13/2020 Alternew consumer insights survey

If you don't make alterations right away, how long do you wait?

162 out of 165 answered

1	I'm pretty sure I have damaged clothes in the back of my closet from 5 years ago.	31% / 51 resp.
2	Within a year.	27% / 44 resp.
3	About a month.	25% / 42 resp.
4	They've all been donated.	8% / 14 resp.
5	About a week.	3% / 6 resp.
6	Other	3% / 5 resp.

3/13/2020 Alternew consumer insights survey

If you wait to get alterations done (or never alter anything), what would encourage you to get down with repairing?

163 out of 165 answered

1	Convenience, I have no time.	76% / 125 resp.
2	Low prices, show me the money.	27% / 45 resp.
3	My wardrobe is so cheap, I can just buy something new.	9% / 15 resp.
4	I'm so on trend, I don't keep my clothes longer than a few months.	1% / 2 resp.
5	Other	6% / 10 resp.

3/13/2020 Alternew consumer insights survey

What are major barriers to getting your alterations and repairs done?

155 out of 165 answered

1	Tailors are too expensive for the small repairs I need.	50% / 78 resp.
2	I can't find someone in my area.	24% / 38 resp.
3	I don't even think about it. I just donate it.	11% / 18 resp.
4	I don't see any ads! how am I supposed to know where to go unless it's on Instagram?	11% / 18 resp.
5	I know how to sew and do it all myself.	9% / 14 resp.
6	Other	16% / 25 resp.

3/13/2020 Alternew consumer insights survey

If you make alterations or repairs, where do you typically go?

156 out of 165 answered

1	The laundromat is fine.	31% / 49 resp.
2	I've had my tailor for years.	30% / 47 resp.
3	I do them myself.	17% / 27 resp.
4	I don't do them at all, I already told you that!	10% / 16 resp.
5	Other	20% / 32 resp.

3/13/2020 Alternew consumer insights survey

If you keep that look fresh, are you loyal to your tailor or seamstress?

162 out of 165 answered

1	I move around based on price or where I am.	42% / 68 resp.
2	I wish I knew where to go.	26% / 43 resp.
3	They are my wardrobe guru.	25% / 41 resp.
4	Other	6% / 10 resp.

What kind of pricing structure might incentivize you to choose an on-demand alterations and repairs program where a seam-expert came to you to pick up repairs and do any necessary pinning. Think Seamless, but for alterations!

162 out of 165 answered

1	I wouldn't mind paying a few dollars extra for the convenience.	61% / 99 resp.
2	It would need to be less than I already pay where I go.	25% / 41 resp.
3	Give me a subscription so I can get all the tailoring and repairs I need for the year!	6% / 11 resp.
4	If it means I don't have to go to a tailor or laundromat, I would pay a premium.	6% / 11 resp.

What's your age range?

165 out of 165 answered

1	35 - 44	49% / 81 resp.
2	25 - 34	36% / 60 resp.
3	45 - 54	7% / 12 resp.
4	55 - 64	3% / 6 resp.
5	19 - 24	2% / 4 resp.
6	65 or older	1% / 2 resp.
7	18 or younger	0% / 0 resp.

What gender do you identify with?

99 out of 165 answered

1	female	92% / 92 resp.
2	male	6% / 6 resp.
3	Other	1% / 1 resp.

...and your yearly income?

165 out of 165 answered

1	$100,000 or more	51% / 85 resp.
2	$50,000 - $74,999	18% / 31 resp.
3	I prefer not to answer	13% / 23 resp.
4	$75,000 - $99,999	12% / 20 resp.
5	$25,000 - $49,999	3% / 6 resp.
6	$10,000 - $24,999	0% / 0 resp.
7	$9,999 or less	0% / 0 resp.