MARKET POTENTIAL AND CONSUMER AWARENESS OF SUSTAINABLE FASHION: A STUDY BASED ON ERNAKULAM

PROJECT SUBMITTED

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BACHELOR OF ARTS IN ECONOMICS

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CERTIFICATE

This is to certify that the project titled "**Market Potential And Consumer Awareness Of Sustainable Fashion: A Study Based On Ernakulam** " submitted in partial fulfillment of the requirement for the award of the degree of Bachelors of Arts in Economics to St. Teresa's College (Autonomous) (Affiliated to Mahatma Gandhi University, Kottayam) is a Bonafide record of the work done by the project group under my supervision and guidance.

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DECLARATION

We hereby declare that the project " Market Potential And Consumer Awareness Of Sustainable Fashion: A Study Based On Ernakulam " submitted by us for the Bachelor of Arts Degree in Economics is our original work.

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CHAPTER - 1

INTRODUCTION

1.1 INTRODUCTION

With terms including "Eco-fashion ," "green fashion," "ethical fashion," and "slow fashion" being used interchangeably when referring to "sustainable fashion," there has been a significant recent interest in sustainable fashion. Sustainable fashion refers to designing, producing, and purchasing clothing in a manner that respects both people and the environment (people and planet). Sustainable fashion implies making clothing that lasts longer, uses fewer resource-intensive and damaging substances, treats workers fairly, and returns to the earth in a way that leaves no toxic residue. We could consider sustainable fashion as fashion with a conscience - a style that doesn't destroy the Earth. The fashion industry has become one of the largest polluters in the world, generating enormous amounts of textile waste while sometimes exploiting workers in developing countries.

Although the roots of sustainable fashion date back to the early 1990's, approximately the same time as the UN Conference, commonly referred to as the Rio Summit, where green concerns were introduced into mainstream fashion and textile media, there was little consideration to green issues until the late 1980's when several companies began to fund research on the environmental implications of the fibers they used in their manufacturing process. Today, fiber and fabric processing remains a significant concern with regard to sustainable fashion. Sustainable fashion provides alternative options through the use of organic and recycled materials, clean manufacturing processes, fair compensation for labor, sustainable design, and through closed-loop business systems, in which clothing is reused, recycled, or biodegradable.

From pineapple leaf-based fabrics to mushroom leather, innovation has made sustainable options available to consumers, whether they purchase high-quality items, shop second hand, or support brands that are transparent regarding their practices. Despite the rapid expansion of sustainable fashion, however, there is a significant disconnect between the increasing awareness of sustainable fashion and action. Although sustainable fashion is becoming well-known throughout the world, the amount of market potential and degree of consumer acceptance of sustainable fashion varies greatly depending upon region and social and economic status. Therefore, understanding local consumer perceptions and behaviors is necessary for the continued advancement of sustainable fashion. In Ernakulam, a rapidly expanding urban area with a highly educated and increasingly environmentally conscious population, the question

that is raised is: How aware are the consumers in Ernakulam regarding sustainable fashion, and what factors encourage, or discourage, the purchasing behavior of consumers.

This research aims to fill the gap in current knowledge by providing an examination of the local consumers' perception of sustainable fashion. This research has three major goals: First, to examine the degree of consumer awareness and understanding of sustainable fashion among the residents of Ernakulam. Second, to investigate the degree of demand for sustainable fashion in the Ernakulam market, the consumers' preference for different pricing structures for sustainable alternatives, and the consumers' willingness to pay a premium for sustainable alternatives. Third, to determine the obstacles and barriers that affect the purchasing decisions of consumers, particularly the factors that inhibit consumers who are aware of sustainable fashion from choosing sustainable alternatives. Through the exploration of these aspects of sustainable fashion in the specific context of Ernakulam, this research will provide insights that are applicable to other emerging consumer markets in India. The choices made by consumers in Ernakulam, and in similar cities throughout India, will ultimately define the direction of the future of fashion - both domestically and internationally. The results of this research will demonstrate whether the consumers in Ernakulam are willing to contribute to this transformation, what factors motivate the consumers in Ernakulam to choose sustainable options, and what barriers remain to be overcome.

1.2 REVIEW OF LITERATURE

Ansari, Goenka & Nandakeolyar (2021) show there is an interest in sustainable clothing, but that this interest does not translate into purchasing decisions because people are so focused on style and price. Younger females with higher incomes make purchases more often, which presents a great opportunity for sustainable clothing if the product meets the customer's needs for both aesthetics and cost.

Ma (2023) states that the importance of sustainability in the fashion world will continue to grow and that education and awareness are the keys to making sustainable choices. Ma emphasizes that sustainability has three dimensions – environmental, cultural, and social and the findings of the study demonstrate that informed consumers are much more likely to make choices that support sustainable fashion. Therefore, education can be used to increase the potential for sustainable products in the marketplace.

Khandual & Pradhan (2019) looked at sustainable fashion from the perspective of both the brand and the consumer and found that upcycling, buying second hand, fair trade, and eco-friendly materials all play important roles in sustainable fashion. The study also found that awareness of sustainable production methods, labor practices, and the environmental impacts of the production process is growing. Consumers have indicated they are willing to pay a premium for ethically produced garments; however, affordable pricing remains a challenge for many sustainable fashion products and manufacturers. However, the willingness of consumers to pay more for ethically produced garments indicates long-term market opportunities for sustainable fashion.

Amrin & Bagyalakshmi (2017) examined the demand for eco-fashion handbags made using renewable and biodegradable materials and found that consumers prefer to buy handbags that are made with sustainable materials. The authors demonstrated that eco-fashion products can be successful in the marketplace if the products meet both the aesthetic and environmental expectations of the consumer, and therefore position eco-accessories as a viable commodity in emerging sustainability-driven markets.

Watson & Yan (2013) investigated differences in purchasing, satisfaction, and disposal behaviors of fast and slow fashion consumers. The study found that fast fashion consumers prioritize trends and low prices, while slow fashion consumers emphasize quality and longevity, and indicate there is a market opportunity for sustainable and slow-fashion alternatives.

Jalil & Shaharuddin (2019) investigated eco-fashion consumption using the Theory of Planned Behaviour and identified that attitudes, perceived behavioral control, and disposal behavior influence purchase intentions. The authors found that recycled eco-fashion offers commercial opportunities to environmentally responsible consumers.

Alizadeh, Liscio & Sospiro (2023) analyzed greenwashing in the fashion industry and identified a discrepancy between sustainability claims and actual performance. The study emphasized that the negative effects of greenwashing on consumer trust and market competition require institutional accountability and transparency.

Heinze (2020) studied sustainable fashion entrepreneurship and defined emotional labor as a limitation on the scale and mainstream acceptance of sustainable fashion entrepreneurs. Heinze found that sustainable fashion entrepreneurs' ethical commitments, financial uncertainty, and pro-social motivations define their sustainable fashion business models and require institutional and financial support.

Akenji (2014) developed a critical analytical framework for analyzing green consumerism and demonstrated that sustainability initiatives unfairly burden consumers with a disproportionate amount of responsibility, creating Akenji's "consumer scapegoat." The study pointed out that institutional, economic, and structural barriers hinder sustainable fashion from becoming mainstream, even with growing ethical awareness, thusexplaining the gap between awareness of sustainability and purchasing behavior.

Scaturro (2021) discussed the role of technological innovation in enabling sustainable fashion. The author addressed the emergence of eco-tech fashion, which utilizes digital platforms, innovative materials, and better production processes to minimize the environmental and social externalities associated with fast fashion. The author argued that the adoption of technology is essential to transform fashion markets to become more sustainable and socially responsible.

Malig-on & Campos (2024) examined the perceptions of youth concerning sustainability within fast-fashion markets and found that a gap existed between their awareness of sustainability and their actual purchasing behavior. The authors conducted research in Davao City and found that consumers were influenced by social norms, trends, and price sensitivity when making purchasing decisions, and that sustainability was typically less important than affordability and fashionability. The authors recommended that a combination of educational, institutional, and policy-based interventions could improve sustainable consumption.

Martínez-Martínez, Martelo-Landroguez, Cepeda & Cegarra-Navarro (2020) stated that the primary environmental and ethical shortcomings of fast fashion include pollution and labor exploitation. The authors argued that sustainable fashion is a corrective alternative to fast fashion and requires responsible sourcing, transparent supply chains, and educated consumers. The authors further argued that innovation and

education are required to facilitate structural transformations in the fashion sector and emphasized that sustainability initiatives require consideration of both environmental and social objectives.

Hall (2017) contrasted fast and slow fashion through an ethnography of Japanese kimono culture. Hall demonstrated that slow fashion prioritizes craftsmanship, durability, and sustainability, while fast fashion prioritisesrapid turnover and low cost. The study illustrated how consumers' perceptions of quality and cultural value influence their willingness to pay for sustainable fashion goods and thus illustrates the potential marketability of sustainable fashion goods.

1.3 RESEARCH PROBLEM

Although Sustainable Fashion has emerged as a significant component of global sustainability discourse, there is a scarcity of empirical studies exploring its relevance in local markets such as Ernakulam. Although the concept of Green Consumerism suggests increasing consumer concern for the environment; the behavioural tendency of consumer scapegoatism (i.e., consumer express environmental concerns, however do not alter their purchasing practices) create ambiguity around the degree to which consumers are aware of and understand Sustainable Fashion; the magnitude of sustainable fashion demand; and the amount consumers are willing to pay for sustainable apparel.

Concurrently, producers and retailers have insufficient concrete information to assess the market viability of sustainable fashion (e.g., price elasticity, demand sensitivity, and the scale of a possible consumer base). The disconnection represents a larger information gap in society, wherein sustainability is increasingly discussed in theory but poorly understood in practice.

By studying sustainable fashion through both consumer and producer viewpoints and employing distinct questionnaires, this study aims to bridge this gap by providing insight into levels of awareness, market potential, and behavioural constraints affecting sustainable fashion in Ernakulam. The findings will be intended to generate evidence-based knowledge on the possibility of developing sustainable fashion as a viable market segment at a local level.

1.4 OBJECTIVES

1. To assess the level of consumer awareness and understanding of sustainable fashion.
2. To evaluate the market potential for sustainable fashion in terms of demand, pricing preference, and willingness to pay.
3. To identify challenges in consumer choice-making towards sustainable fashion.

1.5 METHODOLOGY

This study employs a descriptive research methodology to evaluate consumer awareness, market potential, and behavioral constraints related to sustainable fashion in Ernakulam. The primary data were collected through two structured questionnaires given to consumers and producers, respectively. A total of 30 consumers aged 18 years and older and 15 producers/retailers involved in the apparel business were interviewed. Only producers who sold completely or partially sustainable fashion products were included in the producer sample to insure that the producers sampled met the objectives of the research.

Secondary data were also collected from journal articles, research papers, institutional reports, and reputable online resources to provide additional support for the primary data collected and place the sustainable fashion trends into context. The primary and secondary data collected were analyzed using descriptive statistical techniques such as graphs, tables, and expository descriptions of the results. By using the dual perspective methodology, the researchers were able to investigate the degree of awareness among consumers, the willingness to pay for sustainable fashion, the market feasibility of sustainable fashion, and the decision-making barriers related to sustainable fashion in Ernakulam.

1.5.1 SOURCES OF DATA

To conduct this study, both primary and secondary data were employed.

Primary Data:

Primary data were collected using two self-administered structured questionnaires to interview respondents living in Ernakulam district. One questionnaire targeted

consumers aged 18 and older; the second questionnaire targeted producers/retailers selling sustainable fashion products.

Secondary Data:

Secondary data were collected from academic journal articles and research papers, industry and sustainability-related market reports, government and institutional publications, non-governmental organization and environmental organizations' reports, and reputable online resources. These sources provided background information on sustainable fashion, consumer behavior, and sustainability trends at the national and global levels.

1.5.2 POPULATION

The population of this study includes consumers aged 18 years and older living in Ernakulam, and producers/retailers engaged in the apparel business who sell sustainable fashion products either completely or partially.

1.5.3 SAMPLE DESIGN

The sample design entails interviewing samples of consumers and producers to ensure that the results provide information on both market awareness and feasibility related to sustainable fashion.

1.5.4 SAMPLE SIZE

The sample size is composed of 30 consumers aged 18 years and older and 15 producers/retailers who sell sustainable fashion products either completely or partially.

1.5.5 SAMPLING METHOD

The study used a non-probability sampling method, combining convenience and purposive sampling. Consumers were selected based on their availability and willingness to respond, while producers were purposely chosen because they were involved in selling sustainable fashion products. This approach helped collect relevant data within the limited time and resources of the study.

1.5.6 METHOD OF DATA COLLECTION

The method of collecting data is a critical factor in determining the validity and reliability of research results. For this study, primary data were collected using two

structured questionnaires. The consumer questionnaire was administered entirely via Google Forms to consumers aged 18 years and older living in Ernakulam. The producer/retailer questionnaire was administered through a combination of in-person surveys (where responses were recorded by the respondent and the surveyor acted as a facilitator) and online submissions (for producers/retailers who elected to submit their responses electronically). Secondary data were obtained from academic journal articles, industry and sustainability-related market reports, government and institutional publications, non-governmental organization and environmental organizations' sources, and reputable online platforms.

1.6 THEORETICAL FRAMEWORK

1.6.1 Value–Belief–Norm Theory

The Value–Belief–Norm Theory was developed by Paul Stern in 1999 and explains that pro-environmental behavior originates from a chain of cognitive elements beginning with deeply held values, leading to environmental beliefs, and finally activating personal moral norms. Individuals who internalize ecological and altruistic values are more likely to experience a moral responsibility to adopt sustainable consumption patterns. In the context of fashion, the theory highlights how environmentally conscious consumers evaluate clothing not merely as functional items but as products embedded within broader ecological and social systems. Thistheoretical lens also provides insight into how ethical motivations influence market preferences and shape emerging sustainable consumption trends.

1.6.2 Signaling Theory

Signaling Theory was introduced by Michael Spence in 1973 and explores how individuals communicate private information about preferences, identity, or social values through visible actions or market choices. In markets characterized by information gaps or credence attributes, signals play an important role in shaping perceptions of quality and legitimacy. Sustainable fashion brands, eco-labels, and ethical certifications function assymbolic signals that convey environmental awareness, social responsibility, and lifestyle orientation. As sustainability gains cultural value, signaling influences consumer willingness to purchase products that align with identity-

driven consumption, demonstrating how environmental responsibility can become a marker of social distinction or prestige.

1.6.3 Asymmetric Information and Green washing

The concept of asymmetric information was notably advanced by George Akerlof in 1970, illustrating how unequal access to information between buyers and sellers can produce inefficiencies and distort market outcomes. Within sustainable fashion markets, producers possess detailed knowledge of their environmental claims, supply chains, and production methods, while consumers often lack the information necessary to verify such claims. This imbalance facilitates greenwashing, where sustainability-related messaging may be exaggerated or misleading. Asymmetric information not only affects consumer confidence but also challenges the credibility of sustainable fashion markets, as uncertainty and skepticism reduce the likelihood of consistent ethical purchasing even among environmentally aware consumers.

1.6.4 Externalities and Market Failure

The theory of externalities and its association with market failure was articulated by Arthur Cecil Pigou in 1920 and remains central to welfare economics. Externalities arise when economic activities generate social costs or benefits that are not reflected in market transactions. Fast fashion production creates negative externalities such as pollution, carbon emissions, textile waste, and exploitative labor practices, imposing long-term environmental and social costs on society. Because these costs are not incorporated into retail prices, markets fail to allocate resources efficiently, resulting in overconsumption of unsustainable clothing and underinvestment in environmentally responsible alternatives. The theoretical framework of externalities provides an economic rationale for sustainable fashion initiatives, regulatory interventions, and policy reforms aimed at internalizing environmental and social costs.

1.7 LIMITATIONS OF THE STUDY

1. Time limitations were imposed on the study's timeframe.
2. The study was confined to the Ernakulam district, limiting the geographic area examined, and may not represent the full range of sustainable fashion trends occurring in other areas.

3. Limited numbers of producers were included in the producer sample since they had to sell completely or partially sustainable fashion products, thereby creating a smaller and more selective group of respondents.
4. Some producers were unwilling to provide information about sales, sourcing, or store performance that would have added greater depth to the producer-side data collected.
5. The sample size of 30 consumers and 15 producers was limited, which may not fully represent the broader market for sustainable fashion.

1.8 CHAPTER SCHEME

The study organised into five chapters as follows:-

- Chapter 1 - Deals with introduction of the study and includes the review of literature ,statement of research problem,objectives of study ,theortical framework, methodology, limitation of the study , chapter scheme , and glossary.
- Chapter 2 - presents on overview , significant and market relevance of sustainable fashion , covering the growth of sustainable fashion industry in Ernakulam,Kochi
- Chapter 3 - Focuses on analysis , results and interpretation of the primary and

secondary data collected from the consumer respondents in Kochi ,using appropriated statistical and descriptive tools.

- Chapter 4 - Focuses on analysis ,result and interpretation of primary and secondary data collected from the producers in Kochi , using appropriated statistical and descriptive tools.
- Chapter 5 - Summarised the major findings of the study and provide the conclusion, suggestion and scope for further research.

1.9 AREA OF STUDY

The present study is conducted in Ernakulam district of Kerala, which is one of the major commercial, urban, and cultural centers of the state. Ernakulam, including Kochi city, is known for its rapidly growing retail sector, modern lifestyle, higher literacy rate, and increasing consumer awareness regarding environmental and social issues. The district has a diverse population comprising students, working professionals,

entrepreneurs, and families, making it an ideal location to study changing fashion consumption patterns and preferences.

1.10 TOOLS FOR DATA ANALYSIS

Charts:

Charts were used to visually represent the collected data for easier understanding and quick comparison. Pie charts, in particular, help show the proportion or percentage distribution of responses, allowing patterns and trends to be identified at a glance.

Tables:

Tables were used to present the data in a structured and systematic manner. They help in displaying exact numerical values, frequencies, and percentages clearly, making detailed analysis and comparison more accurate and reliable.

1.11 SCOPE OF STUDY

This study focuses on analyzing the market potential and consumer awareness of sustainable fashion within the geographical limits of Ernakulam district. The scope covers an examination of how far consumers are familiar with the concept of sustainable fashion, including eco-friendly clothing, ethical production practices, and environmentally responsible consumption patterns. It seeks to understand the level of knowledge, perceptions, and attitudes of consumers toward sustainable apparel and whether they recognize its social and environmental benefits.

CHAPTER 2:

OVERVIEW AND CONTEMPORARY RELEVANCE OF SUSTAINABLE FASHION

2.1 INTRODUCTION

Sustainable fashion is one of the most prominent themes in today's discourse of sustainability regarding the global textile and apparel industry, due to the increased public scrutiny on the negative impacts of the textile and apparel industry in terms of environmental damage, waste and pollution, depletion of resources, and poor working conditions for workers and unfair compensation, as well as the decreasing lifespan of products. Sustainable fashion seeks to counterbalance the impact of fast fashion through the development of environmentally friendly sourcing methods, fair and humane production processes, longer product life cycles, and consumers who are aware of their purchases. The transition of sustainability from being a secondary concern to becoming a mainstream economic and cultural issue has made it imperative to understand how consumers perceive and participate in sustainable clothing, thus making it both academically interesting and practically significant for companies, government agencies and organizations which serve as intermediaries in the market.

This research on the market potential and consumer awareness of sustainable fashion in Ernakulam benefits from establishing the concerns of sustainable fashion within a broad theoretical and context framework. Historically, sustainable fashion has developed from being an environmental activist movement focused on a specific niche to a defined market segment created by the development of new materials based on science and technology, the application of circular economy principles, certification programs for sustainability and the spread of values associated with eco-friendly consumption. The process of development of sustainable fashion differs significantly at international, national and sub-national levels, depending on the structure of economies, cultural identity and consumer preferences and access to information about sustainable products. The intersection of sustainable fashion with Indian culture includes artisanal textile traditions in India, increasing environmental awareness in India, and the limitations imposed by prices in making purchasing decisions. At the local level, cities like Ernakulam represent a small-scale illustration of a region with high levels of literacy, exposure to mass media, and urban consumption patterns that provide an ideal environment for the early adoption of products that have a focus on sustainability.

Through the description of the theoretical concepts and history of the development of sustainable fashion, this chapter establishes the conceptual framework required to analyze how consumers understand sustainable fashion, how they assess the appeal and value of sustainable fashion and how the potential of the market will develop in

emerging urban environments. Additionally, this background will support the examination of the factors that affect the decision to purchase sustainable clothing, price sensitivity of sustainable clothing, and perceived barriers to purchasing sustainable clothing. Through the linkages of the literature on sustainability to the economic aspects of consumer behavior and market development, this chapter creates the groundwork for the empirical studies that follow.

2.1 PHILOSOPHICAL BACKGROUNDS OF SUSTAINABLE FASHION

Sustainable fashion is an approach to the production and use of textiles and clothing to limit the environmental damage caused by the production, distribution, and disposal of clothing. Sustainable fashion does not follow the prevailing fast-fashion model, which is characterized by rapid and high-volume production, low-cost products and high levels of disposability. Instead, sustainable fashion aims at using environmentally-friendly raw materials, environmentally-friendly production methods, socially responsible labor standards, and post-consumer practices (e.g., reuse, repair, resale, recycling) to create clothes that last longer. The combination of all ofthese aspects forms sustainable fashion as an ethical and environmental response to the negative external effects of the fashion industry.

Sustainable fashion includes in its scope environmental accountability, social equity and accountable consumption practices that lead to lower pollution levels, better resource conservation, and improved working conditions in accordance with the existing literature. Sustainable fashion also includes longer product lifecycles; transparently sourced inputs; and minimizing waste. From an economic point of view, sustainable fashion falls under the area of environmental economics since it includes minimizing environmental externalities and aligning market results with maximizing social welfare. From a behavioral perspective, sustainable fashion generates questions about the level of awareness among consumers, their attitudes towards sustainable clothing, the perceived benefits associated with sustainable clothing, the price sensitivity of consumers toward sustainable clothing, and the reasons why consumers make the choices they do regarding sustainable clothing.

As a background for this study, it is necessary to define sustainable fashion clearly in order to assess consumers' awareness and understanding of sustainable fashion, estimate

the potential of the sustainable fashion market based on demand and price preferences of consumers, and identify barriers that exist for consumers when making sustainable purchasing decisions. Together, these aspects will constitute the theoretical basis for empirical investigations.

2.2 DEVELOPMENT AND TREND OF SUSTAINABLE FASHION

The development of sustainable fashion is linked to criticisms of industrialization and mass consumption, which began in the later half of the 20th century. Some early concerns included the release of chemicals into the environment, the contamination of water, the accumulation of textile wastes and the exploitation of workers in global supply chain systems. Although these debates showed the need for sustainable fashion, the actual implementation of sustainable fashion was hampered by technological limitations, the absence of supportive regulation, and low levels of awareness among consumers.

Over the past few decades, sustainable fashion has developed into a prominent issue due to increasing awareness of climate change, advancements in material sciences, greater transparency in global supply chains and an increasing recognition of circular economic models. Circular fashion is defined by a design principle in which products are designed to be reused, recycled, upcycled or repaired in closed loop systems that extend the lifecycle of materials and minimize environmental impacts. The growth of certification programs and labels for environmental performance, and the increase in sustainability reports produced by large apparel companiesillustrate the institutionalization of sustainable fashion within the global market. According to contemporary academic literature, sustainable fashion has evolved from being a niche activist movement to becoming a mainstream strategic domain in the apparel industry.

India's engagement with sustainable fashion is influenced by historically and culturally unique characteristics. Traditionally, Indian textile production systems (for example, handloom weaving, natural dyeing, artisanal production) were based on sustainable principles prior to the emergence of the modern sustainability discourse. However, the post-liberalization expansion of fast fashion led to a decrease in the utilization of traditional production systems, increased usage of synthetic fibers and faster turnover rates of clothing. The current resurgence of interest in sustainable fashion in India reflects a renewed appreciation for native crafts, increased environmental consciousness

among young consumers, innovative entrepreneurship and the utilization of heritage-based branding.

The historical and contemporary development of sustainable fashion serves as critical contextual information for the present study, as it allows for an evaluation of how sustainable consumption practices have changed over time and how contemporary consumers perceive the value and desirability of sustainable clothing in terms of quality, durability, identity, pricing and environmental impacts.

2.3 SUSTAINABLE FASHION ACROSS DIFFERENT SPATIAL SCALES: INTERNATIONAL, NATIONAL, LOCAL DIMENSIONS

International Dynamics

At a global scale, sustainable fashion has transitioned from being a marginal consideration to a central priority for industry participants, governments, and consumers. Many multinational apparel firms have implemented sustainability reporting frameworks, carbon footprint analyses, environmentally-responsible procurement strategies and circular business models. In some countries, there are regulatory initiatives such as extended producer liability laws, textile recycling mandates and bans on waste that require producers to take steps to reduce textile waste and increase accountability within production systems. Research studies conducted internationally indicate that environmental values, social values, attitudes and perceived behavioral control significantly affect consumers' intentions to buy sustainable clothing.

The trends in sustainable fashion globally have implications for the patterns of consumption locally. Awareness of international sustainability discourses exists among consumers in urban and semi-urban areas in regions like Ernakulam through exposure to sustainability messages in advertising, online content and cultural exchange. Therefore, sustainable fashion is significant at a global scale and has the ability to affect the awareness of consumers in spatially localized markets.

National Dynamics (India):

Sustainable fashion has emerged within India via the interplay of cultural heritage, economic perspectives and differing levels of environmental awareness. Consumers in

India have high price sensitivity; however, there are significant opportunities among educated, urbanized consumers recognizing environmental and ethical attributes in their clothing. There are a number of domestic brands emphasizing organic materials, craft revival, minimizing waste in the design process and socio-economic empowerment of artisans. However, despite such developments there are still a number of limitations in India's sustainable fashion landscape, including: a limited supply of certified sustainable products, a lack of knowledge about sustainability standards, and a lack of confidence in sustainability claims made by manufacturers. Thus, sustainable fashion in India is marked by both opportunity and constraint.

Opportunity arises from growing disposable incomes, increasing fashion consciousness, the use of digital retail platforms, and social influences promoting sustainable consumption behaviors. Constraint arises from affordability issues, information asymmetries, difficulty in verifying sustainability claims and a lack of market penetration outside metropolitan areas. Therefore, for academic purposes, this duality provides an optimal framework for evaluating the contribution of awareness, pricing preferences, and environmental concerns toward sustainable consumption behaviors in an emerging market economy.

Local Dynamics (Ernakulam Region):

Due to its high literacy rates, diverse commercial landscape and high level of exposure to both national and international media, the Ernakulam region provides a strategic micro-environment for analyzing sustainable fashion. The demographics and socio-economics of the Ernakulam region provide a suitable environment for the early adoption of sustainable consumption behaviors. Previous studies have indicated that consumers in Ernakulam exhibit the ability to respond to global sustainability narratives, while at the same time displaying unique local preferences and constraints.

In the context of the current project, the Ernakulam region provides an ideal location for researching consumer awareness of sustainable fashion, demand potential, pricing preferences, consumer willingness to purchase environmentally responsible clothing and the barriers to decision-making. In addition to providing valuable insight into localized sustainability transition patterns in India, this knowledge will provide actionable recommendations for brand owners and policymakers.

2.4 SIGNIFICANCE, APPLICABILITY, AND MARKET RELEVANCE OF THE STUDY

The importance of sustainable fashion may be evaluated along environmental, social and economic lines. From an environmental standpoint, the textile and apparel industries utilize vast amounts of water, chemicals and energy while producing pollution and accumulating waste in landfills. Sustainable fashion reduces these impacts by reducing the amount of resources used, selecting materials responsibly, and extending the life cycle of garments. Socially, sustainable fashion improves labor conditions by supporting fair trade, fair wages and safe working environments for workers. Economically, sustainable fashion promotes innovation, creates niche markets and allows brands to differentiate themselves by establishing a competitive advantage in environmentally conscious consumer segments.

Sustainable fashion also provides a useful case study for economists studying markets characterized by externalities and information asymmetries. Environmental awareness and understanding of sustainable benefits influence a consumer's willingness to pay for sustainable products, and companies must make pricing, sourcing, and signaling credibility decisions. Therefore, the market potential of sustainable fashion is directly dependent upon how well consumers understand the environmental benefits of sustainable products, see value in sustainable products, believe the sustainability claims of producers, and are willing to pay premium prices for sustainable products.

2.5 ECONOMIC AND SOCIAL RELEVANCE OF THE STUDY

There are a number of reasons why this study is important. First, it adds empirically to the existing body of knowledge in sustainable fashion, specifically concerning how consumers evaluate sustainable fashion in terms of awareness, perceptions, pricing preferences and demand potential. Second, it evaluates the demand for sustainable fashion in the Ernakulam region — a region that has favorable socio-economic and cultural characteristics for sustainable consumption but has been largely unexplored in the existing body of sustainability research. Third, the findings from this study are relevant to both policymakers and industry stakeholders interested in promoting sustainable consumption, educating consumers about sustainability, strengthening sustainability certification systems and expanding the market share of environmentally

responsible products. Fourth, this study identified the barriers that consumers experience when making purchasing decisions related to sustainable fashion, including affordability issues, uncertainty about environmental claims, limited product visibility and the conflicting nature of sustainability and fashion identity. Fifth, this study is aligned with the global goals of sustainable development that emphasize the critical role that consumption patterns play in achieving environmentally responsible development outcomes.

2.6 CONCLUSION

This chapter provided the theoretical foundation, historical evolution and multilevel relevance of sustainable fashion. As previously discussed, sustainable fashion serves as an environmental, social and economic solution to the negative effects of fast-fashion systems. The evolution of sustainable fashion was illustrated by the changes in materials, production methods, consumer awareness and government regulation. Additionally, the chapter examined the international, national and regional relevance of sustainable fashion, with a focus on the Ernakulam region as the empirical setting for evaluating consumer awareness, market potential and decision-making barriers related to sustainable fashion. The significance and practicality of sustainable fashion research were described relative to environmental sustainability, labor welfare and market economics. Collectively, the chapter provided the theoretical foundation for the evaluation of the objectives of the study and supported the empirical analysis presented in subsequent chapters.

CHAPTER 3

ANALYSIS OF SUSTAINABLE FASHION MARKET : CONSUMER BEHAVIOR

3.1 INTRODUCTION

This chapter analyses the responses collected from 30 consumer respondents in Ernakulam (Kochi) to understand their awareness, attitudes, and purchasing behaviour toward sustainable fashion. Ernakulam is an important urban and commercial centre in Kerala, with a young population, growing fashion awareness, and increasing exposure to sustainability-related discussions. A relatively larger number of consumer respondents was selected because consumer behaviour in the region varies widely based on factors such as income level, age, education, and sensitivity to price.

The analysis focuses on the level of awareness of sustainable fashion, sources of information, frequency of purchase, and willingness to pay for sustainable products. It also examines the main reasons that limit regular purchasing, such as higher prices, limited availability of sustainable fashion stores, design preferences, and uncertainty about sustainability claims. Through this analysis, the chapter assesses the demand-side market potential of sustainable fashion in Ernakulam and highlights the gap between consumer awareness and actual purchasing behaviour.

3.2 ANALYSIS OF CONSUMER AWARENESS, WILLINGNESS TO PAY, AND BARRIERS

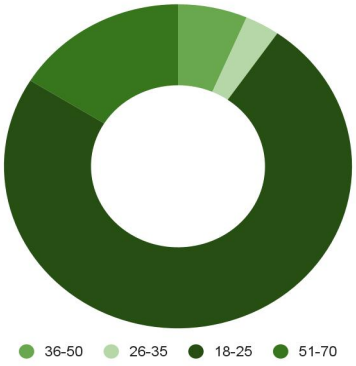
SECTION A - SOCIAL CHARACTERISTICS

It describes the social characteristics of the consumer respondents of this study on sustainable fashion in Kochi. This includes age, gender, occupation, monthly income and the education qualification. The majority of respondents were females ranging between 18 and 35 years old. They represent the younger generation that shows growing awareness of sustainable fashion. Many participants were students or young professionals working in creative, retail or corporate sectors. In terms of income, affordability plays a significant role in their fashion choices. Overall, this varied group shows how the social and economic factors influence the consumer behaviour towards the sustainable fashion.

3.2.1 AGE GROUP OF RESPONDENTS

Age was included to analyse generational differences in awareness and purchasing behaviour. Consumer attitudes towards sustainable fashion vary significantly across age groups.

Figure 3.1 – Age distribution of respondents



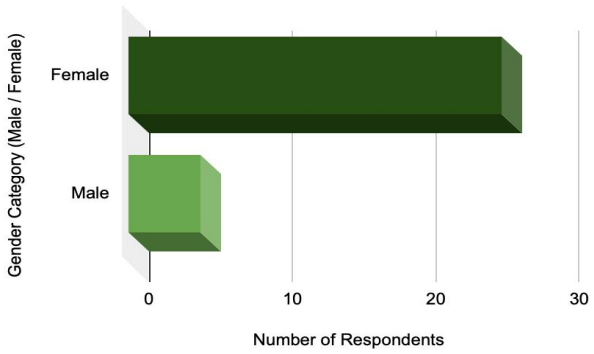
Source: Primary Data

Based on the collected responses, a large majority of participants belonged to the **18–25 age group (76.7 percent)**, followed by those aged **51–70 years (16.7 percent)**, **36–50 years (3.3 percent)**, and **26–35 years (3.3 percent)**. This demographic over representation, likely due to their active digital presence and greater exposure to sustainability discussions, means the findings on awareness, purchasing behavior, and market potential for sustainable fashion may largely reflect youth-centric trends. Consequently, insights into middle-aged and older consumer segments are limited, potentially skewing the overall analysis towards the preferences and engagement levels of younger demographics.

3.2.2 GENDER COMPOSITION OF RESPONDENTS

Gender was considered to understand differences in fashion consumption patterns and ethical purchasing behaviour. Sustainable fashion engagement often varies by gender due to lifestyle and social influences.

Figure 3.2 – Gender distribution of respondents



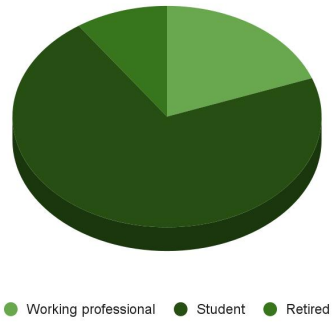
Source: Primary Data

Analysis of gender-wise responses shows that **female respondents constituted 83.3 percent** of the sample, while **male respondents accounted for 16.7 percent**. This predominance suggests either a heightened interest and awareness in sustainable fashion among women, or a comparatively lower engagement and exposure among men in the local context. Consequently, the findings regarding awareness, demand, and willingness to pay may largely reflect female perspectives, potentially skewing the understanding of overall market dynamics.

3.2.3 OCCUPATIONAL PROFILE OF RESPONDENTS

Occupation was included to assess the influence of lifestyle and employment status on purchasing behaviour. It helps explain differences in affordability and consumption frequency.

Figure 3.3 – Occupational status of respondents



Source: Primary Data

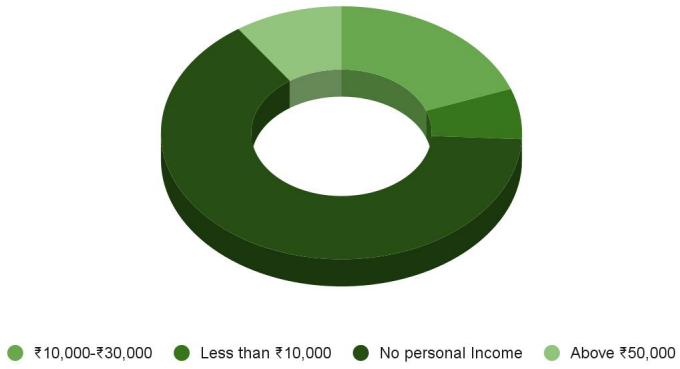
The analysis of occupational distribution indicates that **students formed the dominant group among respondents (73.3 percent)**, followed by **working professionals (16.7 percent)**, while **retired individuals accounted for (10 percent)** of the sample. This

suggests that the findings will predominantly reflect the perspectives of individuals with lower disposable income, whose purchasing decisions are heavily influenced by affordability and social trends. While working professionals (16.7 percent) offer some insight into employment-based consumption, the minimal participation of retired individuals (10 percent) limits the understanding of older age group's engagement. Consequently, the analysis of awareness, willingness to pay, and purchasing behavior will likely be heavily influenced by student-specific consumer patterns.

3.2.4 MONTHLY INCOME OF RESPONDENTS

Income was selected to analyse purchasing power and price sensitivity toward sustainable fashion. Since sustainable products are often premium-priced, income directly affects willingness to pay.

Figure 3.4 – Monthly income distribution of respondents



Source: Primary Data

The monthly income distribution reveals that **a majority of respondents reported having no personal income (66.7 percent)**, followed by **₹10,000–₹30,000 (16.7 percent)**, while **Less than ₹10,000 (6.7 percent)** and **Above ₹50,000 (10 percent)** formed smaller proportions of the sample. The predominance of respondents without personal income corresponds with the earlier finding that students constitute the largest occupational group. This suggests that a significant share of the surveyed population lacks independent purchasing power and may rely on parental or household income for clothing expenditure. Consequently, affordability and pricing may play a central role in shaping their purchasing behavior and willingness to pay for sustainable fashion.

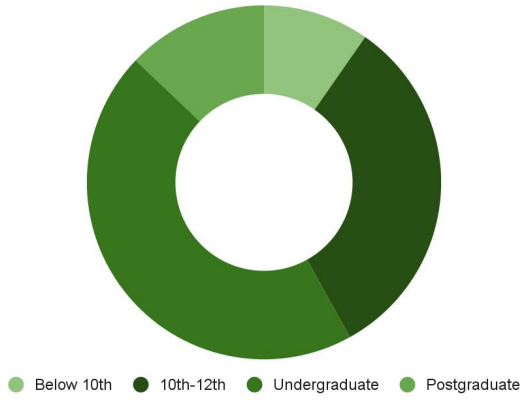
The limited representation of higher-income categories indicates fewer responses from working professionals and financially independent groups. This income distribution

may influence later insights related to market potential, since sustainable fashion products are often priced at a premium relative to conventional fashion.

3.2.5 EDUCATION QUALIFICATION OF RESPONDENTS

Education level was included to assess its influence on awareness and understanding of sustainability concepts. Higher education often correlates with informed and ethical consumption behaviour.

Figure 3.5 – Educational qualification of respondents



Source: Primary Data

The findings show that **Undergraduate students constituted 46.7 percent** of the sample, followed by respondents educated up to the **10th–12th level (33.3 percent)**, those **Below 10th standard (6.7 percent)**, and a smaller share of **Postgraduates (13.3 percent)**. This distribution aligns with earlier demographic patterns, reinforcing that the survey predominantly captured insights from younger academic groups, particularly those in undergraduate education. The presence of respondents from secondary education levels suggests that awareness of sustainability-related concepts is not restricted to higher educational attainment.

The comparatively lower participation from postgraduate respondents may indicate limited engagement from older or more specialized academic cohorts in sustainable fashion discussions. The dominance of undergraduate respondents may influence awareness levels, attitudes, and sensitivity toward sustainability, as exposure to global fashion trends and ethical consumption narratives often increases during university years.

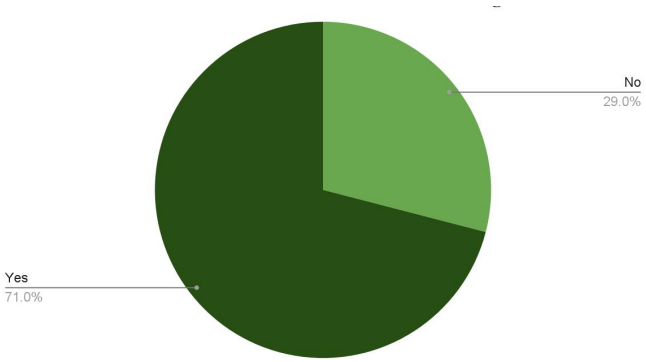
SECTION B – CONSUMER AWARENESS AND UNDERSTANDING

This section describes the awareness and understanding of consumers on sustainable fashion. This states the interest among individuals who are becoming more conscious on the environmental impacts of their clothing choices. Many respondents in the questionnaire indicated that they are familiar with concepts like eco- friendly fabrics, ethical labour practices, recycling/upcycling garments, mini packaging etc. Therefore, the survey highlights that there is a gap between awareness and actual practices, as price accessibility remain as the key barrier to adopt the sustainable alternatives.

3.2.6 AWARENESS OF SUSTAINABLE FASHION

This indicator was included to determine whether respondents are familiar with the concept of sustainable fashion. Awareness is a prerequisite for informed purchasing decisions.

Figure 3.6 – Awareness of sustainable fashion



Source: Primary Data

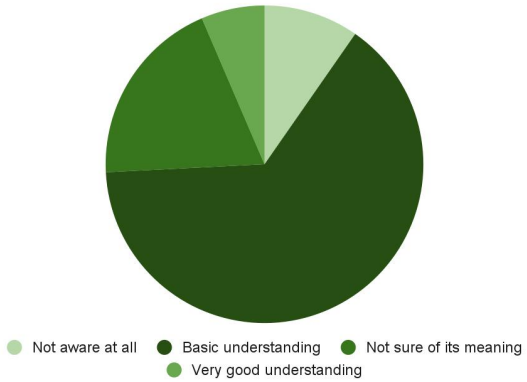
When respondents were asked whether they had previously heard of the term "sustainable fashion," **73.3 percent answered 'Yes'** while **26.7 percent responded 'No'**. This indicates that a substantial majority of the surveyed population possesses preliminary awareness of sustainable fashion as a concept. Such awareness is likely shaped by educational exposure, digital media influence, and increased public discourse on environmental and ethical consumption practices.

However, the presence of nearly one-fourth of respondents who were unfamiliar with the term suggests that knowledge diffusion is not yet universal. This mixed awareness profile reflects both growing visibility of sustainability in the fashion sector and the need for continued informational dissemination to reach broader consumer groups.

3.2.7 UNDERSTANDING OF SUSTAINABLE FASHION

Understanding was measured to assess the depth of consumer knowledge beyond mere awareness. This helps identify informational gaps affecting sustainable purchasing behaviour.

Figure 3.7 – Respondents' level of understanding of sustainable fashion



Source: Primary Data

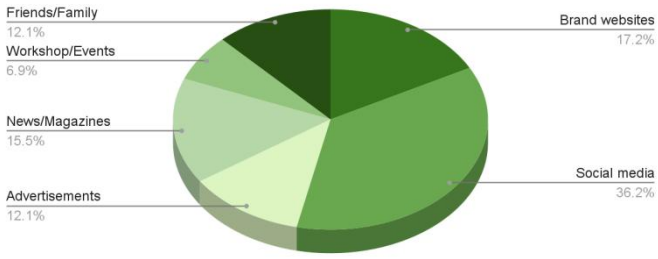
Regarding their self-assessed level of understanding, **66.7 percent of respondents reported having a basic understanding**, while **6.7 percent indicated a very good understanding** of sustainable fashion. In contrast, **6.7 percent stated they were not aware at all**, and another **20 percent were unsure of the meaning**. This pattern suggests that awareness does not always translate into deep conceptual knowledge. Although the majority recognize the term and possess some level of familiarity, only a small proportion demonstrate strong comprehension of sustainability-related principles within fashion. The presence of respondents who are either unaware or uncertain also highlights existing informational gaps.

Overall, these findings indicate that sustainable fashion as a concept has reached consumer consciousness, yet comprehensive understanding remains limited and unevenly distributed.

3.2.8 SOURCES OF AWARENESS OF SUSTAINABLE FASHION

This indicator was included to identify the primary channels through which consumers learn about sustainable fashion. It helps identify the most effective ways to inform and reach consumers.

Figure 3.8 – Information sources on sustainable fashion



Source: Primary Data

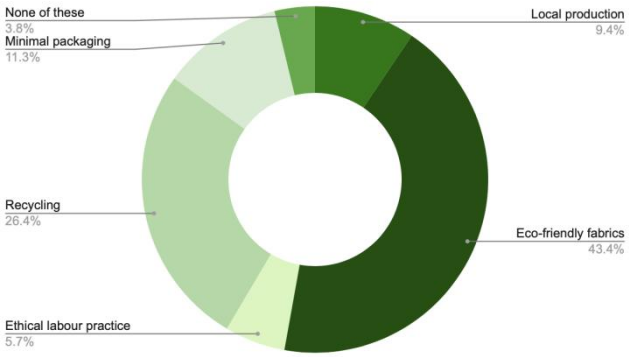
Respondents were asked to identify the sources from which they learned about sustainable fashion, and multiple responses were permitted. The most frequently cited source was **Social Media (36.2 percent)**, followed by **Friends/Family (12.1 percent)**, **Advertisements (12.1 percent)**, **Brand Websites (17.2 percent)**, and **News/Magazines (15.5 percent)**, while **Workshops/Events (6.9 percent)** were comparatively less common sources of exposure. The predominance of social media reflects the strong influence of digital platforms in shaping contemporary fashion knowledge and sustainability discourse. The notable contribution of peer networks (Friends/Family) and commercial communication channels (Advertisements and Brand Websites) indicates that sustainable fashion information circulates through both informal and market-driven pathways.

The relatively lower engagement with workshops and events suggests that more formal or structured learning avenues are less frequently utilized by consumers. Overall, the findings highlight that sustainable fashion awareness in the surveyed region is primarily mediated through **online and social communication channels**, rather than institutional or educational sources.

3.2.9 AWARENESS OF ASPECTS OF SUSTAINABLE FASHION

This indicator was included to analyse which sustainability methods consumers recognise. It highlights partial or holistic understanding of sustainability.

Figure 3.9 – Specific aspects of sustainable fashion known to respondents



Source: Primary Data

When respondents were asked which aspects of sustainable fashion they were familiar with (multiple responses permitted), **Eco-friendly fabrics emerged as the most recognized aspect (43.4 percent)**, followed by **Recycling (26.4 percent)**, **Local production (9.4 percent)**, **Ethical labour practices (5.7 percent)**, and **Minimal packaging (11.3 percent)**. A small share (**3.8percent**) indicated that they were not aware of any of the listed aspects. The results suggest that consumer understanding of sustainable fashion is primarily oriented toward environmental dimensions, particularly materials and recyclability. Social and ethical dimensions such as fair labour practices received comparatively less recognition, indicating that sustainability is often conceptualized more narrowly through ecological rather than socio-ethical considerations.

The limited awareness of local production and minimal packaging suggests that more nuanced or industry-specific sustainability initiatives may not yet be widely communicated or understood by consumers. Overall, the findings reflect **a partial awareness profile**, in which consumers recognize select elements of sustainable fashion but may lack holistic understanding of its full scope.

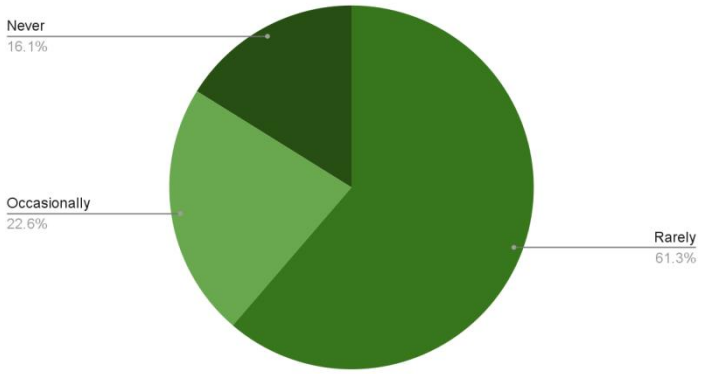
SECTION C – MARKET POTENTIAL AND PURCHASE BEHAVIOUR

The market potential and purchase behaviour for sustainable fashion reveals the consumers willingness to explore the eco - friendly alternatives. This part of the study highlights the both demand side, willingness to pay and awareness and the behavioural patterns that influence the purchasing choices. By combining these we can understand the market growth through consumer attitudes etc. and provides a comprehensive view on sustainable fashion.

3.2.10 FREQUENCY OF PURCHASING SUSTAINABLE FASHION PRODUCTS

Purchase frequency was analysed to assess actual consumption behaviour. It highlights the gap between awareness and practice.

Figure 3.10 – Purchase frequency of sustainable fashion



Source: Primary Data

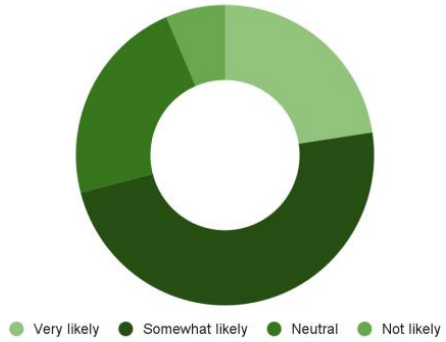
In terms of purchase frequency, **61.3 percent of respondents stated that they buy sustainable fashion products rarely**, followed by **22.6 percent who purchase occasionally**, while **16.1 percent reported that they never purchase such products**. Notably, no respondents indicated purchasing sustainable fashion frequently or regularly. The dominance of infrequent purchasing suggests that although awareness and initial purchasing experiences exist, sustainable fashion has not yet become a routine or habitual consumption choice for most respondents. This pattern may reflect constraints related to price, product accessibility, limited options, or preference for fast fashion due to trend cycles and affordability.

The notable proportion of respondents who have never purchased sustainable fashion further indicates that the market remains in a developing phase, where purchase intention does not always translate into consistent or sustained consumer behavior.

3.2.11 LIKELIHOOD OF CHOOSING SUSTAINABLE FASHION OVER CONVENTIONAL FASHION

This indicator was included to measure consumer intention towards sustainable alternatives. It reflects future adoption potential.

Figure 3.11 – Consumer likelihood of choosing sustainable alternatives



Source: Primary Data

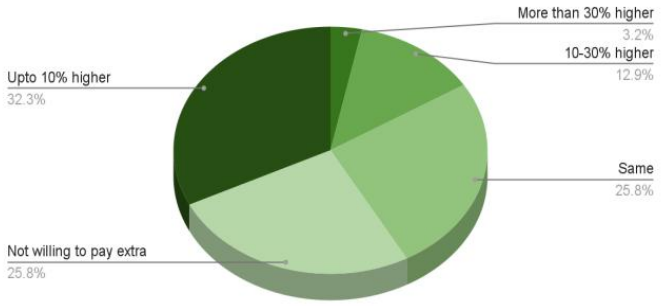
When respondents were asked about their likelihood of choosing sustainable fashion over conventional fashion, **46.7 percent indicated they were somewhat likely**, while **20 percent reported they were very likely** to make such a choice. Meanwhile, **26.7 percent remained neutral**, and **6.7 percent stated they were not likely** to prefer sustainable fashion. The results show a positive inclination toward sustainable alternatives, with the combined share of "somewhat likely" and "very likely" respondents suggesting considerable openness to adopting more environmentally and ethically responsible purchasing practices. However, the presence of neutrality and reluctance among a segment of respondents indicates that sustainable fashion has not yet fully displaced mainstream fast-fashion preferences.

This distribution reflects a consumer base that is interested but still weighing factors such as cost, convenience, style, and availability before making consistent sustainable choices.

3.2.12 PRICE RANGE PREFERENCES FOR SUSTAINABLE FASHION PRODUCTS

This indicator was included to assess price acceptance among consumers. It directly indicates market feasibility.

Figure 3.12 – Willingness to pay premium for sustainable fashion



Source: Primary Data

Regarding willingness to pay, **32.3 percent of respondents indicated they were comfortable paying up to 10 percent more** for sustainable clothing, and an equal **25.8 percent preferred paying the same price** as regular fashion. Meanwhile, **25.8 percent stated they were not willing to pay any extra premium**, **12.9 percent were willing to pay 10–30 percent more**, and **3.2 percent were willing to pay more than 30 percent extra**.

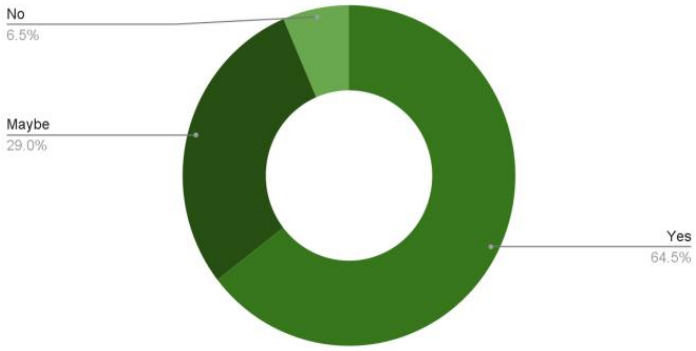
This distribution reveals a mixed pricing outlook, where a substantial share of respondents support sustainable fashion but remain price-sensitive. The majority either expect price parity with conventional products or prefer only a modest premium, which reflects the economic reality of the predominantly student-based sample and the broader market challenge of premium-priced sustainable goods.

The small proportion willing to pay higher premiums suggests that while niche segments may value sustainability strongly enough to absorb additional costs, mainstream adoption is likely to depend on competitive pricing and affordability strategies within the sustainable fashion sector.

3.2.13 INFLUENCE OF PRICE ON SUSTAINABLE FASHION PURCHASES

This indicator was included to understand price sensitivity. As pricing can be a major barrier in sustainable fashion adoption.

Figure 3.13 – Effect of lower pricing on purchase decisions



Source: Primary Data

When asked whether they would buy more sustainable fashion products if prices were lower, **64.5 percent of respondents answered 'Yes'**, while **29.0 percent selected 'Maybe'**, and only **6.5 percent responded 'No'**.

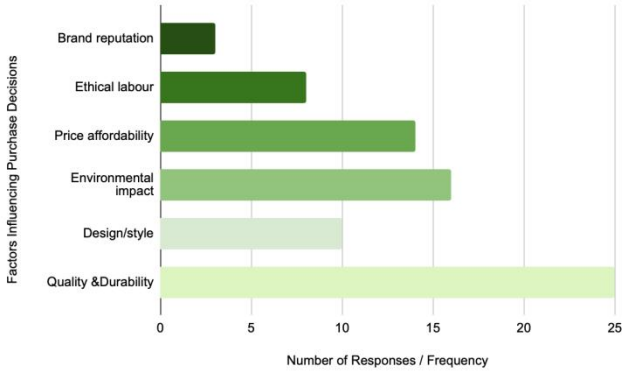
This strong positive response indicates that price constitutes a major determinant of consumer purchasing behavior in the sustainable fashion segment. The high proportion of affirmative responses reinforces the idea that affordability barriers limit consumption, whereas more accessible pricing could considerably enhance market demand.

The relatively small share of respondents unwilling to increase purchases even with reduced prices suggests that for a minority, factors other than cost—such as style preferences, trend cycles, or limited awareness—may be more influential. Overall, the findings highlight the importance of pricing strategies in promoting wider adoption of sustainable fashion.

3.2.14 FACTORS INFLUENCING SUSTAINABLE FASHION PURCHASES

This indicator was included to identify key determinants of buying behaviour. It shows how sustainability compares with traditional factors like price and design.

Figure 3.14 – Determinants influencing consumer buying decisions



Source: Primary Data

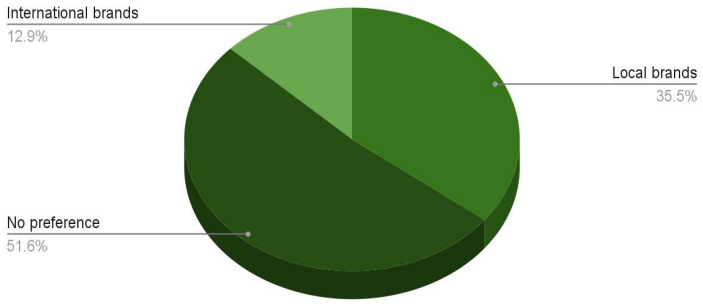
Respondents were asked to identify the key factors that influence their decision to purchase sustainable fashion products (multiple responses permitted). The results indicate that **Quality and Durability(32.9 percent)** and **Affordability (18.4 percent)** were the most significant influencing factors, followed by **Environmental benefits (21.1 percent)**,**Design/style(13.2 percent)** and **Brand reputation (3.9 percent) Ethical labour (10.5 percent).** The dominance of quality and affordability reflects a pragmatic consumer mindset, wherein sustainability considerations are weighed alongside traditional product attributes. Environmental benefits remain an important but secondary motivator, suggesting that sustainability alone may not be sufficient to drive purchases unless paired with desirable product characteristics.

Durability and brand reputation also play relevant roles, indicating that consumers associate sustainable fashion with longer product life cycles and trustworthy brand behavior. Overall, the findings underscore a multi-dimensional decision process in which sustainability functions as one value attribute among several others rather than as the sole basis for consumption.

3.2.15 PREFERENCE FOR LOCAL VS. INTERNATIONAL SUSTAINABLE FASHION BRANDS

This indicator was included to assess brand origin preference. It reflects trust, accessibility, and perceived sustainability.

Figure 3.15 – Brand origin preference in sustainable fashion



Source: Primary Data

When respondents were asked whether they preferred purchasing sustainable fashion from local or international brands, the majority indicated a preference for **Local brands (35.5 percent)**, while a smaller proportion favored **International brands (12.9 percent)**,**No preference (51.6 percent)**

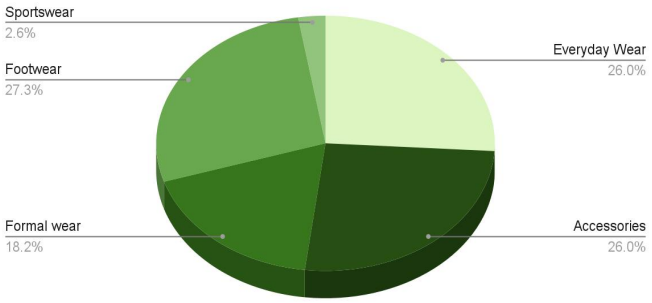
This strong inclination toward local brands suggests that consumers may associate sustainable fashion with localized production, reduced environmental footprint, support for small-scale producers, or cultural familiarity. Local brands may also offer better accessibility and price competitiveness compared to international sustainable fashion labels.

The comparatively lower preference for international brands may indicate perceived pricing barriers, limited availability, or lower brand awareness in the local market. Overall, the results point to a promising market opportunity for domestic sustainable fashion brands within the region.

3.2.16 PREFERRED PRODUCT CATEGORIES IN SUSTAINABLE FASHION

This indicator was included to understand demand across product types. It helps identify high-potential segments.

Figure 3.16 – Product categories consumers are most likely to purchase



Source: Primary Data

Respondents were asked which product categories they would most likely purchase in sustainable fashion (multiple responses allowed). The results show that **Every day wearing (26.0 percent)** of selections, followed by **Accessories (26.0 percent)**, **Footwear (27.3 percent)**, and **Sports wear (2.6 percent) Formal wear(18.2 percent).**

The dominance of clothing reflects the centrality of garments within fashion consumption and suggests that sustainable alternatives are perceived as most relevant in this category. Accessories and footwear represent secondary interest areas, possibly associated with broader lifestyle shifts toward sustainability rather than core wardrobe replacements.

The relatively lower preference for bags may indicate limited product exposure, availability, or perceived necessity in sustainable variations. Overall, the findings indicate that market demand within sustainable fashion remains strongest for apparel products, where consumer familiarity, utility, and visibility are higher.

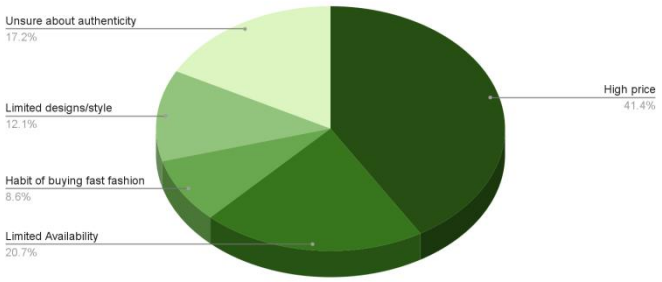
SECTION D – CHALLENGES AND BARRIERS

Here it clearly states the challenges and barriers faced by the consumers while adopting the sustainable fashion. This includes high prices, limited styles, and habit of buying fast fashion. It states the shopping challengesfaced which includes few store options, lack of product information and uncertainty about where to buy. Many respondents acknowledge the encounter of greenwashing which states the trust in brands. Better certification and labelling are seen as important tools that increase the consumers' willingness and confidence to buy sustainable fashion products.

3.2.17 REASONS FOR AVOIDING SUSTAINABLE FASHION

This indicator was included to identify key adoption barriers. It explains low purchasing despite awareness.

Figure 3.17 – Barriers to purchasing sustainable fashion products



Source: Primary Data

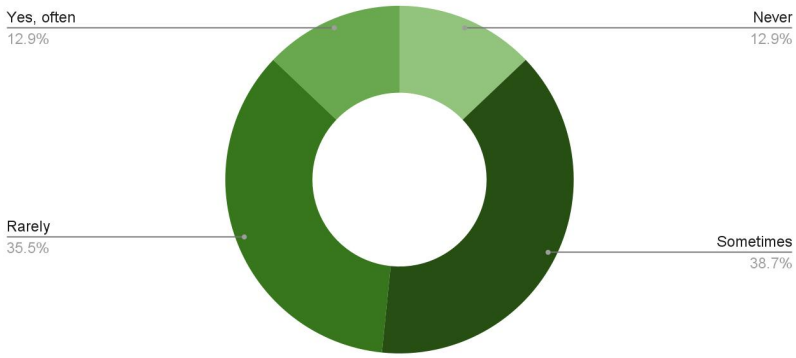
Respondents were asked to indicate the main reasons they might avoid purchasing sustainable fashion (multiple responses permitted). The most frequently identified barrier was **Higher price (41.4 percent)**, followed by **Limited designs/styles(12.1 percent),Habit of buying fast fashion (8.6 percent), Unsure about authenticity(17.2 percent).**

Respondents were asked to indicate the main reasons they might avoid purchasing sustainable fashion (multiple responses permitted). The most frequently identified barrier was higher price (41.4 percent), followed by insecurity about authenticity (17.2 percent), limited designs/styles (12.1 percent), and the habit of buying fast fashion (8.6 percent). Higher pricing emerged as the principal constraint, reinforcing earlier findings that sustainable fashion is perceived as costlier than conventional alternatives. The notable share of respondents who were unsure about authenticity indicates the presence of informational gaps, particularly in verifying sustainability claims or understanding product certifications. Style-related concerns suggest that sustainable fashion is still perceived as less diverse in its aesthetic offerings, which carries weight given the trend-driven nature of fashion consumption. Meanwhile, the relatively smaller proportion indicating fast-fashion habits suggests that behavioral patterns exist but are not the dominant barrier. Overall, the findings illustrate a combination of economic, informational, and stylistic barriers that may inhibit broader adoption of sustainable fashion.

3.2.18 EXPERIENCE WITH MISLEADING SUSTAINABILITY CLAIMS (GREENWASHING)

This measure was included to assess consumer trust issues. Misleading claims affect confidence in sustainable brands.

Figure 3.18 – Exposure to misleading sustainability claims in fashion



Source: Primary Data

When asked whether they had encountered misleading claims about sustainable fashion (commonly referred to as **greenwashing**), **12.9 percent of respondents answered 'Yes'**, while **38.7 percent responded 'Sometimes', 12.9 percent responded 'Never' and 35.5 percent stated 'Rarely'.**

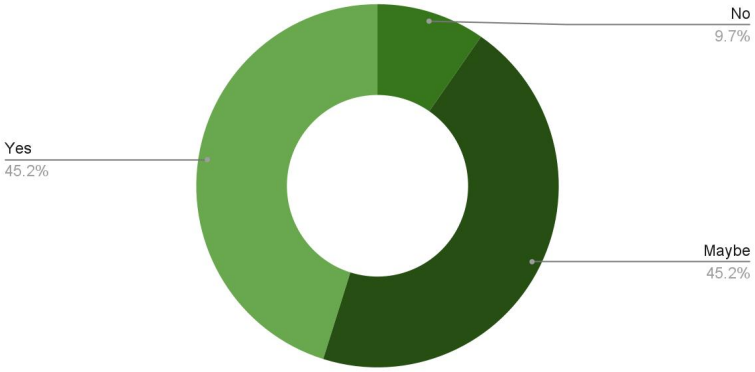
These results indicate that a substantial share of respondents perceive or suspect that brands may exaggerate or falsely advertise sustainability-related attributes such as eco-friendly materials, ethical sourcing, or production transparency. The high proportion of "Maybe" responses suggests uncertainty and information asymmetry, where consumers may not always possess sufficient knowledge to verify the authenticity of sustainability claims.

While only a minority explicitly denied encountering such claims, the combined share of "Yes" and "Maybe" responses highlights a level of skepticism and ambiguity surrounding sustainability communication within the fashion sector. This reflects broader industry challenges related to transparency, certification, and consumer trust.

3.2.19 INFLUENCE OF LABELLING AND CERTIFICATION ON PURCHASE DECISIONS

This indicator was included to examine the role of transparency. Certification helps reduce uncertainty and builds trust.

Figure 3.19 – Impact of certification and labelling on consumer likelihood to purchase



Source: Primary Data

When respondents were asked whether better labelling and certification would make them more likely to purchase sustainable fashion products, **45.2 percent answered 'Yes'**, while **45.2 percent chose 'Maybe'**, and only **9.7 percent responded 'No'**.

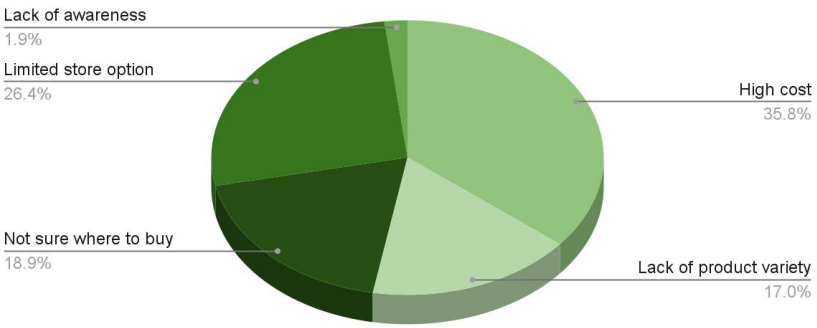
These results indicate a strong preference for reliable and standardized information regarding sustainability claims. Certification and labelling mechanisms appear to play a critical role in reducing consumer uncertainty, verifying environmental and ethical claims, and addressing concerns related to greenwashing.

The substantial "Yes" response suggests that improving transparency and informational clarity could significantly enhance consumer confidence and support market growth for sustainable fashion. The small proportion of respondents unaffected by such measures suggests that for some consumers, purchase decisions remain influenced by other factors such as price or personal preferences rather than informational assurance alone.

3.2.20 CHALLENGES FACED WHILE SHOPPING FOR SUSTAINABLE FASHION IN KOCHI

This measure was included to assess local market constraints. Accessibility and availability influence consumption behaviour.

Figure 3.20 – Consumer-reported challenges in accessing sustainable fashion products



Source: Primary Data

Respondents were asked to identify the challenges they face when shopping for sustainable fashion in Kochi (multiple responses permitted). The most frequently cited challenge was **Limited store option (26.4 percent)**, followed by **High prices (35.8 percent)**, **Lack of product information (1.9 percent)**, **Lack of product variety (17.0percent), Not sure where to buy (18.9 percent).**

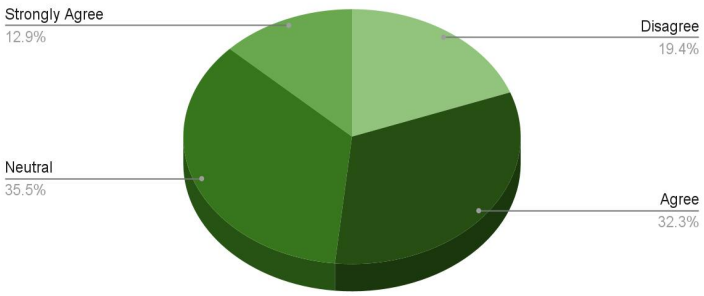
The predominance of availability-related concerns suggests that sustainable fashion offerings are still emerging within the local retail environment. Consumers may struggle to find sufficient variety, sizing, or product categories within existing outlets, making sustainable choices less accessible compared to mainstream fashion.

Price once again surfaced as a key constraint, reinforcing earlier findings that affordability remains a central barrier. The relatively lower selection of informational challenges indicates that while awareness gaps exist, access and affordability constitute more immediate obstacles for consumers seeking sustainable fashion in Kochi.

3.2.21 PERCEPTION OF SUSTAINABLE FASHION AS INCOME-SPECIFIC

This indicator was included to assess inclusivity perceptions. It reflects whether sustainability is viewed as elitist.

Figure 3.21 – Consumer perception of sustainable fashion as exclusive to higher-income groups



Source: Primary Data

When respondents were asked whether they believe sustainable fashion is only for higher-income consumers, **19.4 percent disagreed**, while **32.3 percent agreed**, **35.5 percent remained neutral** and **strongly agreed 12.9 percent**

This distribution reveals a divided perception regarding the socio-economic accessibility of sustainable fashion. While nearly half of the respondents do not view sustainable fashion as limited to higher-income groups, a significant portion perceives it as premium-oriented or exclusive. This aligns with broader market narratives in which sustainable fashion is often associated with higher price points, boutique branding, and niche consumer segments.

The neutral responses suggest some uncertainty, likely due to limited exposure to varied pricing ranges or brand options in sustainable fashion. Overall, the findings indicate that while perceptions of exclusivity persist, they are not universally held, suggesting potential for broader market inclusivity if pricing and accessibility barriers are addressed.

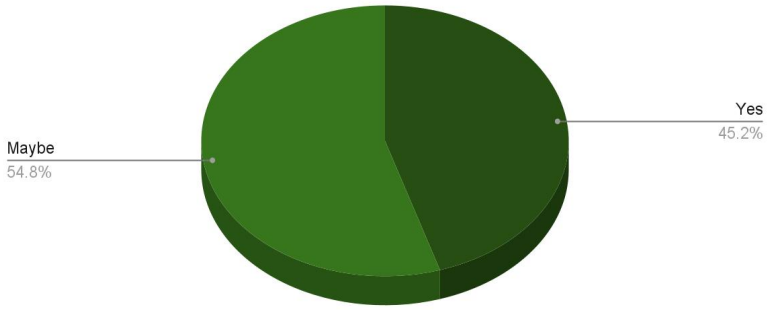
SECTION E – FUTURE OUTLOOKS AND RECOMMENDATIONS

Here we can see the consumers outlook and recommendations on the sustainable fashion, where it explores how demand is going to evolve in next five years. This section also highlights the action consumers believe in brands that should encourage the purchases by expanding locations, lowering prices, improving designs and clear certification labels, finally it provides the space for consumer driven suggestions on practical insights on how sustainable fashion can be promoted.

3.2.22 EXPECTATIONS OF FUTURE DEMAND GROWTH FOR SUSTAINABLE FASHION

This question was included to understand consumer optimism. It reflects perceived long-term market potential.

Figure 3.22 – Expectations about future market demand)



Source: Primary Data

When asked whether they expect demand for sustainable fashion to grow over the next five years, **45.2 percent of respondents answered 'Yes'**, while **54.8 percent selected 'Maybe'**. Notably, none of the respondents responded 'No'.

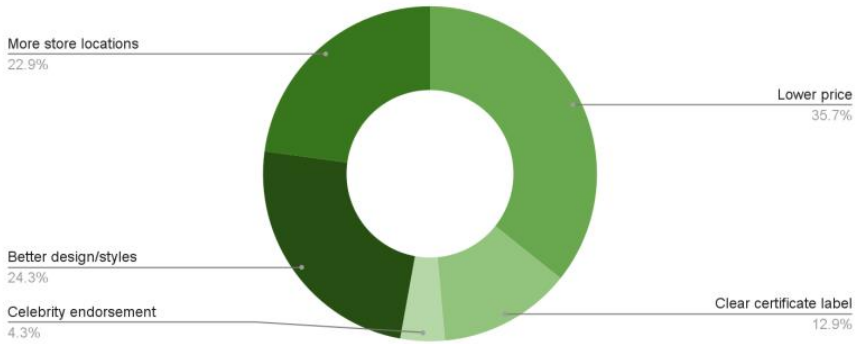
This overwhelmingly positive expectation indicates strong optimism regarding the future trajectory of sustainable fashion demand. The findings suggest that consumers anticipate increasing awareness, improved availability, and greater market integration of sustainable products in the coming years.

The presence of "Maybe" responses reflects some uncertainty, likely tied to factors such as pricing trends, brand participation, and shifts in consumer values. However, the absence of negative expectations highlights a general belief that sustainable fashion represents a growing and evolving market segment rather than a temporary niche trend.

3.2.23 ACTIONS BY BRANDS THAT WOULD ENCOURAGE SUSTAINABLE PURCHASES

This indicator was included to identify effective market strategies. It provides insights for business and policy intervention.

Figure 3.23 – Consumer-preferred brand strategies to promote sustainable fashion



Source: Primary Data

Respondents were asked which actions by brands would most encourage them to purchase sustainable fashion (multiple responses permitted). The most commonly selected action was **Lower price(35.7 percent)**, followed by , **Providing more style and product variety (24.3 percent)**, and **Offering better certifications or eco-labels (12.9 percent)**, **Celebrity endorsement (4.3 percent), More store location (22.9 percent).**

The prominence of price reductions once again highlights cost as the dominant barrier to sustainable fashion adoption. Greater transparency was also viewed favorably, suggesting that consumers appreciate clarity regarding sourcing, production ethics, and environmental impact. The demand for more style options indicates that sustainable fashion must remain competitive with fast-fashion aesthetics to broaden appeal.

Certification and eco-labelling, while chosen less frequently, remain relevant as mechanisms for enhancing trust and mitigating concerns related to misleading sustainability claims. Overall, the findings indicate that effective brand strategies must balance **affordability, transparency, style, and trust** to stimulate wider consumer participation in sustainable fashion markets.

3.2.24 CONSUMER SUGGESTIONS FOR PROMOTING SUSTAINABLE FASHION IN KOCHI

This open-ended question was included to capture consumer-driven solutions. It provides qualitative depth to quantitative findings.

Respondents were invited to provide suggestions on how brands in Kochi can encourage more consumers to choose sustainable fashion. Common suggestions included:

- **Reducing prices** to make sustainable products more affordable and competitive with fast fashion
- **Improving product availability and visibility** through expansion of retail outlets and online platforms
- **Enhancing transparency** regarding materials, sourcing, and production processes
- **Increasing variety and modern designs** to align with prevailing fashion trends
- **Raising awareness** through campaigns, workshops, and social media engagement
- **Introducing better eco-labelling and certification** to build consumer trust and address greenwashing concerns

These open-ended responses reinforce key findings from earlier questions, particularly regarding pricing, accessibility, transparency, and awareness. Consumers appear willing to engage with sustainable fashion but seek improvements in affordability, style, and credibility, alongside broader market support and educational efforts within the region.

3.3 CONCLUSION

This chapter analysed consumer awareness and purchasing behaviour toward sustainable fashion in Ernakulam. Although awareness was relatively high, understanding remained basic and did not translate into frequent purchases. Price sensitivity, limited availability, and restricted design options emerged as the primary barriers to adoption. Purchasing decisions were influenced more by quality and affordability than sustainability considerations alone, reflecting a practical consumption approach. Overall, the findings indicate emerging interest and market potential, but expansion depends on improved affordability, accessibility, and credible sustainability communication.

CHAPTER 4

ANALYSIS OF SUSTAINABLE FASHION MARKET: PRODUCER PERSPECTIVES

4.1 INTRODUCTION

This chapter analyses the responses collected from **15 sustainable fashion producers operating in Ernakulam (Kochi)**. Although sustainable fashion businesses are present in the region, the number of producer respondents was limited due to the **lack of readiness among several firms to cooperate and share business-related information**. As business data such as costs, pricing, and production practices are often considered sensitive, only those producers who were willing to participate openly were included in the study.

Ernakulam is a major commercial and fashion hub in Kerala, making it a relevant location for studying sustainable fashion production and market behaviour. The analysis focuses on producer characteristics, sustainability practices, pricing decisions, and cost-related challenges. It also examines producer perceptions regarding consumer demand, willingness to pay, competition from fast fashion, and difficulties in communicating sustainability claims. This chapter provides insight into the supply-side conditions of the sustainable fashion market in Ernakulam and highlights the practical constraints faced during data collection as well as business operations.

4.2 ANALYSIS OF PRODUCER PRACTICES, PRICING DECISIONS, AND MARKET LIMITATIONS

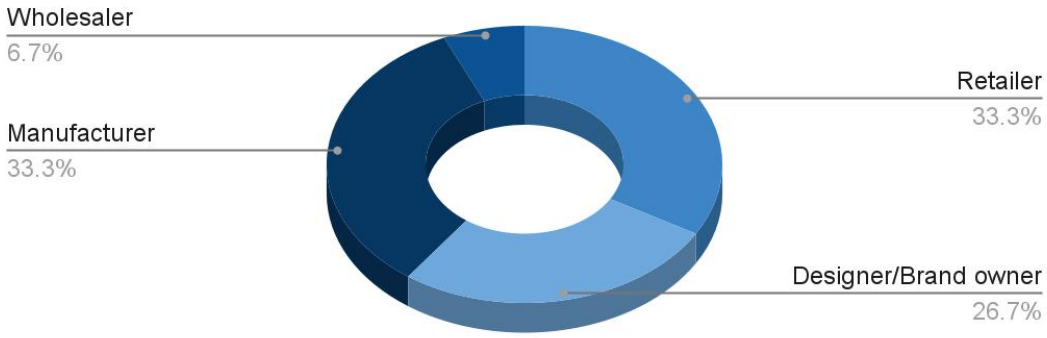
SECTION A – BUSINESS PROFILE

In this it is designed to gather the key background information about the business, whether it operates as a wholesaler, retailer, manufacturer etc. Along with it also states the years of operation, workforce size and annual revenue which states the stability. It also highlights the main product categories such as accessories, everyday wear or formal wear, where the sustainability is applied. In short, this section explains the identity, size, financial strength and focus areas of the business to understand their role in sustainable fashion.

4.2.1 TYPE OF BUSINESS

This indicator was included to understand the structure of the sustainable fashion sector. Different business types face different challenges.

Figure 4.1 – Business types of sustainable fashion producers/respondents



Source: Primary Data

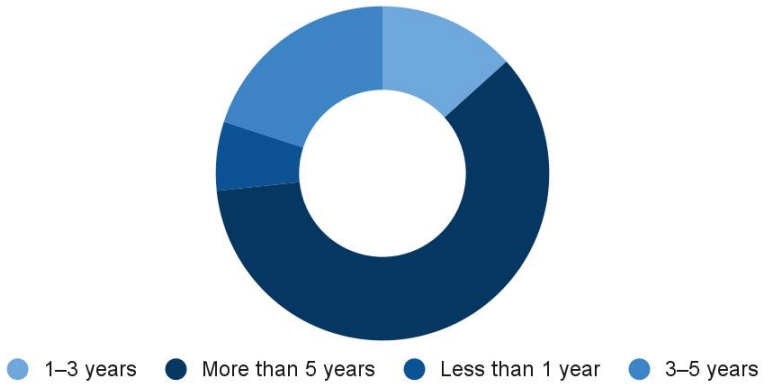
The majority of respondents identified themselves as **Wholesaler (6.7 percent) Designer /Brand owners (26.7 percent)**, followed by **Manufacturers (33.3 percent)**, and **Retailers (33.3 percent)**.

This distribution suggests that the sustainable fashion segment in Kochi is not dominated by a single category of producer but is instead dispersed across multiple business functions. The relatively equal representation of manufacturers and retailers indicates that sustainable fashion activities are present at both the production and market-facing ends of the supply chain. Meanwhile, the participation of designer/brand owners highlights the continued role of creative and entrepreneurial initiatives in shaping the emerging sustainable fashion space.

4.2.2 YEARS IN BUSINESS

Years of operation were analysed to assess business maturity. Experience influences sustainability adoption and stability.

Figure 4.2 – Duration of business operations in sustainable fashion



Source: Primary Data

Analysis of business experience shows that **60.0 percent of respondents had been in business for more than 5 years**, followed by **20.0 percent operating for 3–5 years**, **13.3 percent for 1–3 years**, and **6.7 percent for less than 1 year**.

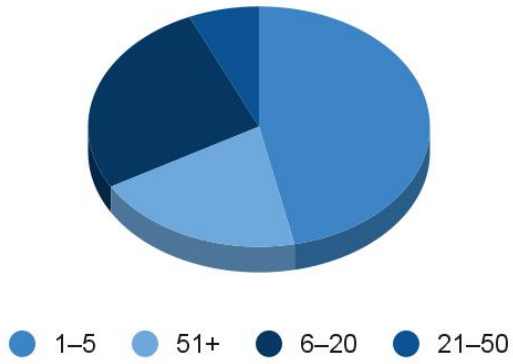
The predominance of firms with more than five years of experience suggests that sustainable fashion producers in Kochi are relatively established rather than newly emerging enterprises. This indicates a degree of maturity within the sector, supported by continuity in business operations and market adaptation. The presence of firms in earlier stages of business development also demonstrates the entry of new actors into sustainable fashion, reflecting growing entrepreneurial interest.

Overall, the distribution highlights a sector combining both established players and newer entrants, which may contribute to innovation, diversification, and market expansion within sustainable fashion.

4.2.3 BUSINESS SIZE (NUMBER OF EMPLOYEES)

Business size was included to examine scale of operations. Smaller firms often face higher cost pressures.

Figure 4.3 – Size of sustainable fashion businesses by employee count



Source: Primary Data

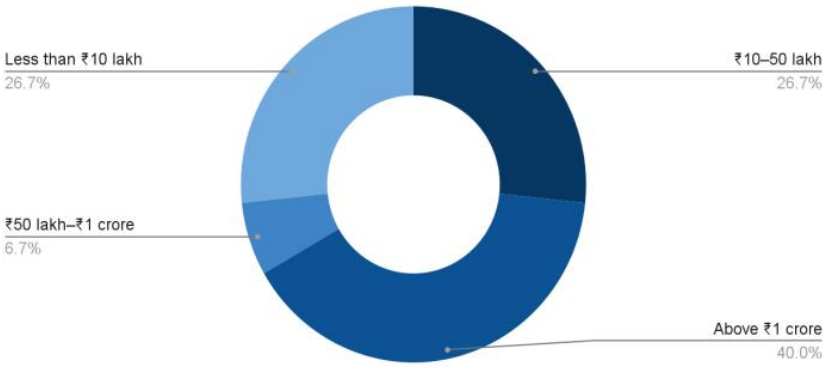
Analysis of business size indicates that **46.7 percent of respondents employed 1–5 workers**, followed by **26.7 percent employing 6–20 workers**, **20.0 percent employing 51 or more workers**, and **6.7 percent employing 21–50 workers**. The predominance of micro- and small-sized enterprises (1–20 employees) suggests that sustainable fashion production in Kochi is largely driven by boutique-scale, independent businesses rather than large corporate entities. This aligns with global sustainability trends, where smaller firms often pioneer slow fashion, artisanal production, and eco-conscious design due to flexibility in operations and stronger niche positioning.

The presence of larger firms (51+ employees), although limited, indicates that sustainable fashion is also gaining traction within more structured manufacturing settings, potentially enabling greater scalability and production capacity. Overall, the distribution reflects a sector where innovation is primarily rooted in smaller enterprises, with emerging pathways for industrial expansion.

4.2.4 ANNUAL REVENUE (APPROXIMATE)

Revenue was included to assess financial strength. It reflects economic viability of sustainable fashion businesses.

Figure 4.4 – Annual revenue range of sustainable fashion businesses



Source: Primary Data

Analysis of approximate annual revenue revealed that **40.0 percent of businesses reported revenues above ₹1 crore**, followed by **₹10–50 lakh (26.7 percent)**, **Less than ₹10 lakh (26.7 percent)**, and **₹50 lakh–₹1 crore (6.7 percent)**.

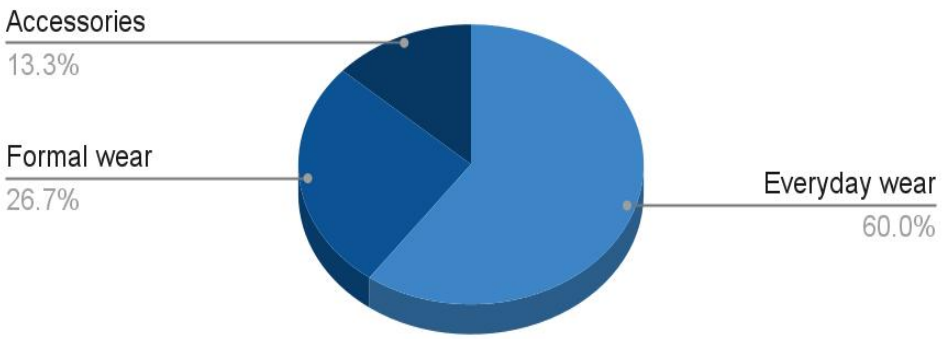
The presence of firms earning above ₹1 crore indicates that sustainable fashion in Kochi is not limited to micro-scale or experimental ventures; rather, it includes financially successful businesses capable of sustaining competitive operations. At the same time, the sizable share of firms generating lower revenue (below ₹50 lakh) reflects a diverse sector where smaller enterprises coexist with more established actors.

This revenue distribution suggests varied business maturity and market reach within the sustainable fashion ecosystem. The coexistence of high-revenue and emerging firms may indicate a developing market structure, where innovative smaller brands and financially stronger enterprises contribute to sectoral growth from different strategic positions.

4.2.5 THE MAIN PRODUCT CATEGORIES OFFERED IN BUSINESS

This question was included to understand production focus. Product type influences demand and pricing.

Figure 4.5 – Product categories offered by sustainable fashion businesses



Source: Primary Data

When asked about the main product categories they produce, respondents identified **Everyday wear (60.0 percent)** as the most common category, followed by **Formal wear (26.7 percent)** and **Accessories (13.3 percent)**. Multiple responses were permitted.

The predominance of everyday wear suggests that sustainable fashion brands in Kochi are focusing on practical, frequently used clothing items, which may offer higher sales turnover and broader consumer relevance compared to niche or occasion-based products. Formal wear and accessories, while present, represent smaller market segments and may cater to specific customer groups or aesthetic preferences.

The product distribution indicates alignment with global sustainable fashion trends, where basics and casual apparel dominate due to wearability, versatility, and consumer willingness to experiment with sustainable alternatives in everyday consumption contexts.

SECTION B – AWARENESS AND ADOPTION OF SUSTAINABLE PRACTICES

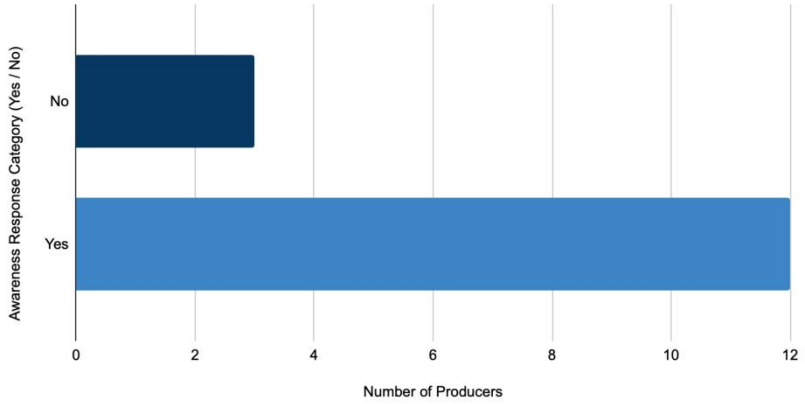
This section focuses on understanding how fashion producers in Kochi implement sustainability in their businesses. This section explores how producers define sustainable fashion through recycling, ethical labour etc, revealing their understanding of the concept and lastly identifying the specific practices being followed such as upcycling, use of organic fibres, fair wages and low - waste production. Therefore, it

highlights their knowledge, attitudes and actions towards sustainability and how deeply sustainability is being interpreted in the local fashion industry.

4.2.6 AWARENESS OF SUSTAINABLE FASHION PRIOR TO STARTING BUSINESS

This indicator was included to assess intentional sustainability adoption. It reflects motivation behind business entry.

Figure 4.6 – Prior awareness of sustainability concepts among producers



Source: Primary Data

Producers were asked whether they were aware of sustainable fashion before starting their business. The majority responded **'Yes' (80.0 percent)**, while **'No' (20.0 percent)** accounted for the remainder.

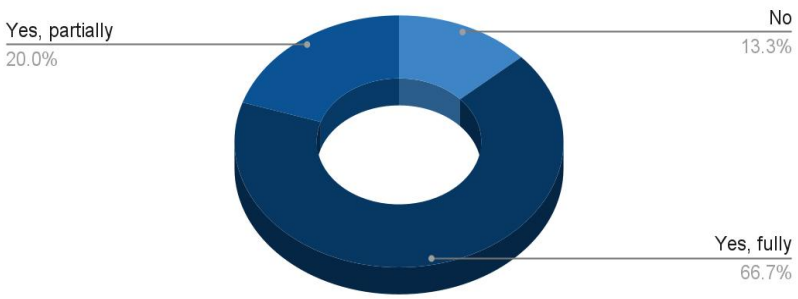
This distribution indicates that most producers entered the sector with at least preliminary awareness of sustainability-related concepts, suggesting that knowledge and intention may play a significant role in motivating sustainable business formation. The smaller share with no prior awareness may reflect businesses that transitioned into sustainability over time due to market demand, industry trends, or ethical considerations.

Overall, the results suggest that conscious engagement and intentionality are key drivers behind sustainable fashion production in the local context, with awareness preceding business operations for most firms.

4.2.7 CURRENT PRODUCTION OF SUSTAINABLE FASHION PRODUCTS

This question was included to evaluate integration of sustainability. It distinguishes full and partial adopters.

Figure 4.7 – Engagement of producers in sustainable product manufacturing



Source: Primary Data

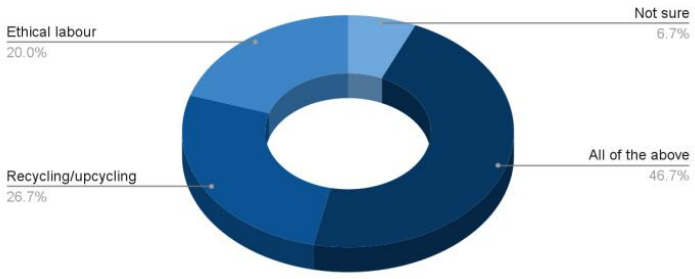
When asked whether they currently produce sustainable fashion products**(66.7 percent) of 'Yes fully',(20.0 percent) of 'Yes partially' and (13.3 percent) of 'No' .** This unanimous response indicates that all participating firms are actively involved in sustainable fashion production rather than merely expressing interest or future intentions. The absence of non-participation reflects a purposive sample consisting of established sustainable producers operating within Kochi, which aligns with the study's dual-perspective design.

The result confirms that the producer dataset captures active stakeholders within the sustainable fashion value chain, enabling subsequent analysis on practices, challenges, market potential, and consumer interactions from the production standpoint.

4.2.8 DEFINITION OF SUSTAINABLE FASHION (PRODUCER PERSPECTIVE)

This indicator was included to assess conceptual understanding. It allows comparison with consumer understanding.

Figure 4.8 – Producers' conceptual understanding of sustainable fashion



Source: Primary Data

When asked how they define sustainable fashion, **46.7 percent of producers selected "All of the above"**, indicating a holistic interpretation that combines environmental, ethical, and material dimensions. This was followed by **Recycling/Upcycling (26.7 percent)**, **Ethical labour (20.0 percent)**, and **Not sure (6.7 percent)**.

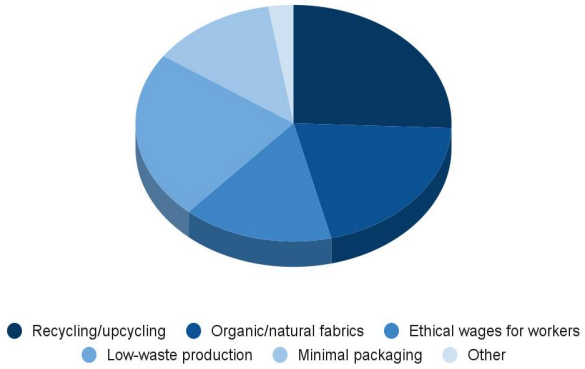
The dominant recognition of multiple sustainability dimensions suggests that producers perceive sustainable fashion beyond just eco-material substitution, encompassing broader value-chain considerations such as ethical employment practices and circularity. The substantial selection of recycling/upcycling reflects practical alignment with sustainability in production, while ethical labour highlights social responsibility within the sector.

The small proportion of respondents who were unsure indicates minor conceptual ambiguity, but overall, the data demonstrates that producers possess a relatively integrated and multidimensional understanding of sustainability compared to consumers, who predominantly associated sustainability with environmental aspects.

4.2.9 SUSTAINABLE PRODUCTION PRACTICES

This question was included to identify operational sustainability measures. It reflects practical implementation.

Figure 4.9 – Practices adopted by producers in sustainable fashion



Source: Primary Data

Producers were asked which sustainable practices they follow in their business operations (multiple responses permitted). The most frequently reported practices included:

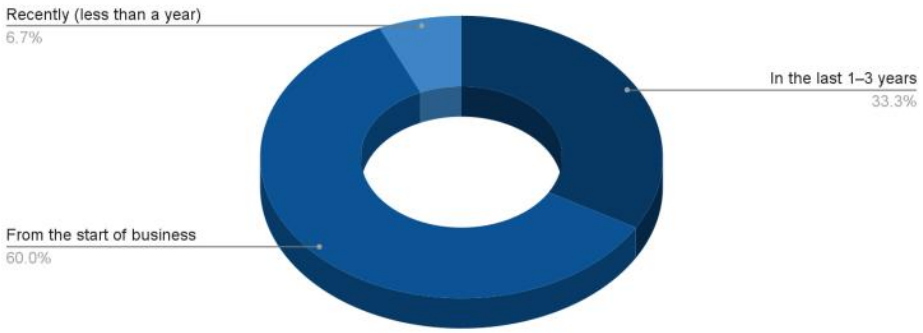
- **Recycling/Upcycling (25.6 percent)**
- **Low-waste production (23.1 percent)**
- **Organic/Natural fabrics (20.5 percent)**
- **Ethical labour practices (15.4 percent)**
- **Minimal packaging (12.8 percent)**
- **Other (2.6 percent)**

These findings indicate that sustainability in production is primarily operationalized through waste- and resource-management practices, with recycling/upcycling emerging as the most widely adopted measure (25.6 percent). Low-waste production (23.1 percent) further demonstrates an active concern for reducing material inefficiencies and environmental impact at the manufacturing stage. The adoption of organic and natural fabrics (20.5 percent) reflects growing interest in environmentally conscious textile choices, consistent with global trends toward low-impact materials. Ethical labour practices, reported by 15.4 percent of producers, highlight the presence of social responsibility considerations within the sector. The comparatively lower emphasis on minimal packaging (12.8 percent) and other practices (2.6 percent) suggests that downstream sustainability initiatives remain less developed than product-focused interventions. Overall, the distribution suggests that sustainable fashion producers in Kochi prioritize improvements at the manufacturing and material levels, with scope for expanding more holistic sustainability across the value chain.

4.2.10 TIMELINE OF SUSTAINABILITY ADOPTION

This indicator was included to assess when sustainability was adopted. It shows whether it is strategic or recent.

Figure 4.10 – When producers began implementing sustainable practices



Source: Primary Data

Producers were asked when they began incorporating sustainable practices into their business operations. The responses show that **60.0 percent implemented sustainability more than 3 years ago**, followed by **33.3 percent who adopted such practices 1–3 years ago**, and **6.7 percent who only adopted sustainability within the last year**.

The predominance of firms adopting sustainability more than three years ago indicates that sustainable fashion practices in Kochi are not merely a recent market trend but have been developing over a substantial period. This suggests early recognition of sustainability as a key differentiator and value proposition within the local fashion industry.

The presence of more recent adopters demonstrates that sustainable fashion continues to attract new entrants, reflecting growing consumer awareness and market potential. Overall, the distribution reveals a sector positioned between early adoption and mid-stage diffusion, with ongoing expansion of sustainability practices among producers.

SECTION C – MARKET POTENTIAL AND DEMAND PERCEPTION

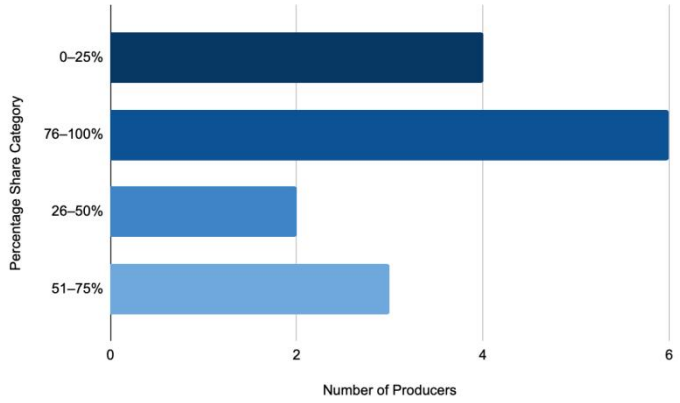
It explores the share of the sustainable products in their overall offerings. This states their perception of current demand levels and the age groups most likely to purchase such products. Here it also considers whether the customers specifically ask for sustainable products and how they usually discover them (through social media, in –

store promotions, events or word of mouth). Finally, it includes through which product categories (casual wear, party wear, formal etc) generates the highest sales for sustainable products. Altogether, this section provides a concise picture of consumer interest, demand drivers and product performance in Kochi's sustainable fashion market.

4.2.11 SHARE OF SUSTAINABLE PRODUCTS IN TOTAL PRODUCTION

This question was included to assess output-level commitment. It reflects sustainability centrality in business models.

Figure 4.11 – Proportion of sustainable products in business output



Source: Primary Data

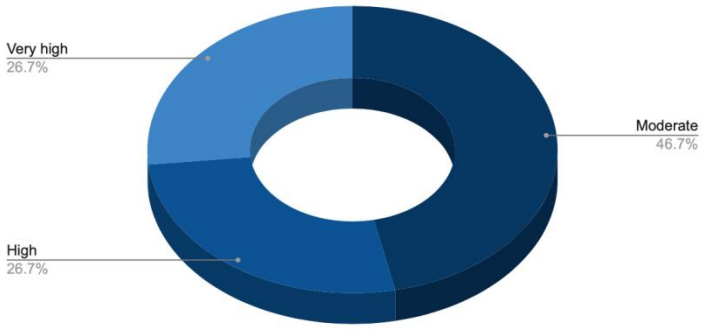
When asked what percentage of their total products were sustainable, **40.0 percent of producers reported that 76–100 percent** of their products were sustainable, followed by **26.7 percent producing 0–25 percent**, **20.0 percent producing 51–75 percent**, and **13.3 percent producing 26–50 percent**. The distribution indicates that a significant segment of producers operate with a predominantly sustainable product portfolio, reflecting a commitment to sustainability as a core business model rather than a supplementary offering. At the same time, the presence of firms producing lower proportions (particularly in the 0–25 percent category) suggests that some businesses are still transitioning towards sustainability, or utilize hybrid production models blending conventional and sustainable outputs.

Overall, the data reflects heterogeneity in production strategies—ranging from full-scale sustainability integration to partial implementation—highlighting both maturity and ongoing evolution within the producer landscape.

4.2.12 CURRENT DEMAND FOR SUSTAINABLE FASHION IN KOCHI

This indicator was included to capture market perception. It reflects demand maturity from the supply side.

Figure 4.12 – Producers' assessment of consumer demand



Source: Primary Data

Producers were asked to rate the current level of demand for sustainable fashion in Kochi. The responses indicated that **46.7 percent perceived demand as Moderate**, followed by **26.7 percent who viewed it as Very high**, and **26.7 percent who considered it High**.

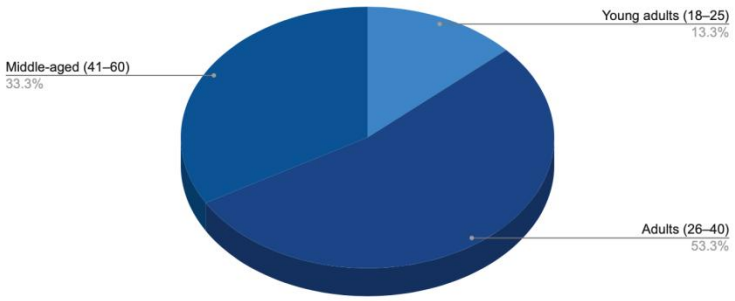
The predominance of "Moderate" suggests that sustainable fashion has gained noticeable visibility in the local market but remains in an early growth phase rather than being fully mainstream. The equal share of respondents perceiving demand as Very high and High indicates a polarized market setting, wherein some producers continue to observe limited consumer uptake while others identify promising opportunities driven by evolving awareness and shifting lifestyle preferences.

The coexistence of these perceptions highlights a transitional demand environment: consumers are neither uniformly disengaged nor fully converted, but rather distributed across varying levels of readiness. Overall, producers perceive the market as developing, with potential for expansion but still constrained by uneven consumer adoption and structural barriers.

4.2.13 CUSTOMER GROUPS DRIVING DEMAND FOR SUSTAINABLE FASHION

This question was included to identify key buyer segments. It helps to align production strategies.

Figure 4.13 – Producer identification of primary sustainable fashion consumers



Source: Primary Data

When producers were asked which customer group purchases sustainable products the most, **Adults aged 26–40 accounted for 53.3 percent**, followed by **Middle-aged consumers aged 41–60 (33.3 percent)**, and **Young adults aged 18–25 (13.3 percent)**.

The predominance of the 26–40 age group indicates that sustainable fashion demand is driven largely by adult consumers with greater purchasing power and likely higher environmental and ethical awareness. The considerable share of middle-aged consumers further reflects emerging interest among older demographics, suggesting that sustainable fashion is not confined to youth-driven consumption trends.

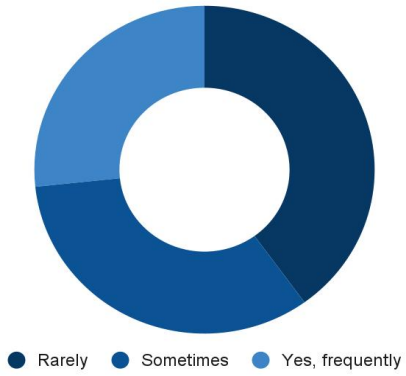
In contrast, younger consumers (18–25), despite being highly sustainability conscious in literature and media discourse, were identified as smaller contributors to actual purchasing. This aligns with the consumer-side findings where awareness was high among younger respondents but purchasing frequency remained low—likely due to affordability constraints.

Overall, the findings reveal an interesting **awareness–purchasing divergence**, where youth drive discourse while adults drive market demand.

4.2.14 CUSTOMER REQUESTS FOR SUSTAINABLE PRODUCTS

This indicator was included to assess active demand expression. It reflects consumer engagement level.

Figure 4.14 – Frequency of direct customer demand for sustainable fashion



Source: Primary Data

When producers were asked whether customers specifically request sustainable products, **40.0 percent responded 'Rarely'**, **33.3 percent responded 'Sometimes'**, and **26.7 percent responded 'Yes, frequently'**.

The distribution indicates that direct demand articulation from customers is relatively limited, with most producers reporting infrequent or occasional requests. This suggests that while sustainable fashion consumption exists, it may often be preference-driven rather than explicitly requested at the point of purchase.

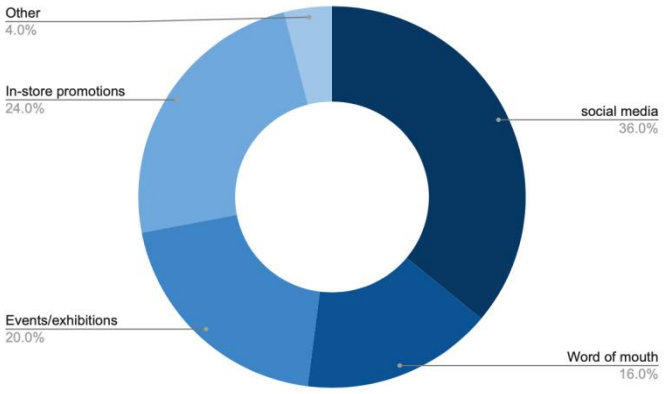
The smaller but notable share of frequent requests indicates a niche segment of informed consumers who actively seek sustainability attributes in their fashion choices. The overall pattern reflects a market where sustainability is emerging as a value-added attribute but has not yet become a dominant consumer-driven purchasing requirement.

These findings complement earlier demand assessments, reinforcing that sustainable fashion demand in Kochi is present but not yet mainstream or consistently articulated in buyer–seller interactions.

4.2.15 CHANNELS THROUGH WHICH CUSTOMERS LEARN ABOUT SUSTAINABLE PRODUCTS

This question was included to identify effective marketing platforms. It highlights communication strategies.

Figure 4.15 – Awareness and information channels for sustainable fashion



Source: Primary Data

Producers reported multiple channels through which customers learn about their sustainable products. The most influential channel was **Social media (36.0 percent)**, followed by **In-store promotions (24.0 percent)**, **Events/Exhibitions (20.0 percent)**, **Word of mouth (16.0 percent)**, and **Other methods (4.0 percent)**. Multiple responses were permitted.

The predominance of social media highlights the critical role of digital communication in visibility-building and consumer education for sustainable fashion. This aligns with consumer-side findings where social media was also identified as the most common awareness source, indicating coherence between demand and supply perspectives.

In-store promotions and events/exhibitions represent experiential and direct engagement strategies, suggesting that sustainable fashion businesses rely on both digital and physical platforms for communication. Word of mouth serves as an interpersonal credibility mechanism, reinforcing trust and community-based influence.

Overall, the distribution reflects a **multi-channel awareness environment** in which digital marketing complements face-to-face and experiential marketing to build consumer familiarity and interest in sustainable fashion.

SECTION D – PRICING AND SALES STRATERGY

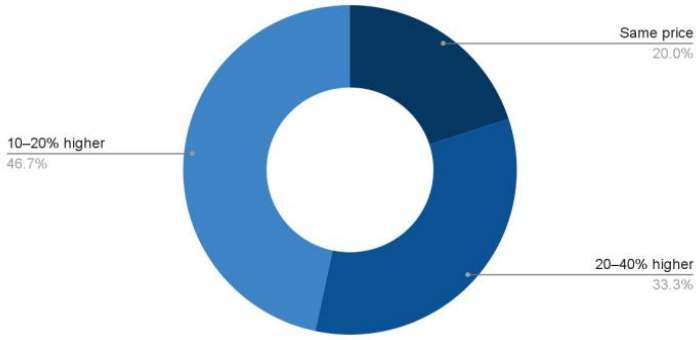
This section looks at how the producers in Kochi set prices and manage sales for sustainable fashion. Here we can see the comparison between the cost of sustainable products with regular ones and checks how many customers are willing to pay more. Then explores the reasons behind the higher prices such as fair wages, certification or material costs. Also asks if lowering prices has been considered to boost sales and

measure how much of the business's revenue comes from sustainable products. Therefore, here it explains the challenges and choices producers face in balancing fair pricing, customer acceptance and revenue generation in the sustainable fashion market of Kochi.

4.2.16 PRICING STRATEGY FOR SUSTAINABLE PRODUCTS

This indicator was included to understand premium pricing. It explains affordability challenges.

Figure 4.16 – Comparison of sustainable product prices relative to regular products



Source: Primary Data

Notably, none of the producers reported pricing sustainable products lower than conventional alternatives.

When producers were asked how the prices of their sustainable products compared to regular products, **46.7% reported pricing them 10–20% higher**, followed by **33.3% pricing them 20–40% higher**, and **20.0% offering them at the same price**. Notably, none of the producers reported pricing sustainable products lower than conventional alternatives.

This pricing distribution indicates that sustainable fashion in Kochi largely follows a premium pricing strategy, reflecting higher input costs associated with eco-friendly materials, ethical labour, or smaller production batches. The presence of producers offering price parity suggests attempts to broaden accessibility or compete more directly with conventional fashion.

The lack of lower pricing reinforces insights from the consumer perspective, where affordability emerged as a major barrier. Together, these findings highlight a **cost–value**

disconnect in the market, where producers are compelled to price higher due to sustainability-driven expenses, while consumers remain price-sensitive.

4.2.17 PERCEIVED CUSTOMER WILLINGNESS TO PAY FOR SUSTAINABLE PRODUCTS

This question was included to assess producer perception of demand. It allows comparison with consumer data.

Table 4.1– Producer assessment of consumer Willingness To Pay

Response Category	Frequency	Percentage
sometimes	11	73.33
yes	2	13.33
no	2	13.33
TOTAL	15	100

Source: Primary Data

Producers were asked how willing customers are to pay for sustainable fashion products. The predominance of **"Sometimes" responses (73.3%)** suggests that while customers recognize the value associated with sustainable fashion, their willingness to pay higher prices remains conditional and shaped by perceived affordability and utility. The equal proportions reporting **"No" and "Yes" willingness (13.3% each)** indicate a divided consumer base, wherein a segment remains constrained by price sensitivity while another segment demonstrates readiness to pay premium rates for sustainability attributes. Overall, the distribution reflects a market in transition, where interest exists but price elasticity remains a decisive factor in sustainable fashion purchases.

Producers were asked to identify the main factors contributing to the higher pricing of sustainable fashion products. The responses revealed that 40 percent attributed higher prices to high raw material costs/waste, while another 40 percent indicated that the pricing results from a combination of multiple cost factors. Ethical labour wages accounted for 13.33 percent of responses, and certification/branding costs constituted 6.67 percent.

The predominance of high raw material costs and multi-factor cost structures suggests that price premiums in sustainable fashion are not driven by a single expense category but arise from cumulative production, sourcing, and operational requirements. The inclusion of ethical labour wages underscores the social component of sustainability, reflecting the need for fair wages and improved working conditions that elevate production costs relative to conventional fast-fashion models. Meanwhile, certification and branding expenses, though cited less frequently, indicate the added financial burden associated with third-party validation, sustainability communication, and market positioning. Overall, the findings reinforce that higher pricing in sustainable fashion is structurally embedded, reflecting cost realities across materials, production ethics, and brand signalling rather than discretionary pricing strategies.

4.2.18 MAIN FACTORS BEHIND HIGHER PRICING OF SUSTAINABLE PRODUCTS

This indicator was included to identify cost drivers. It explains structural pricing issues and to understand the reasons for higher pricing.

Table 4.2 – Cost determinants influencing premium pricing

Response Category	Frequency	Percentage
High raw material waste	6	40
Ethical Labour Wages	2	13.33
Certification/ Branding Cost	1	6.67
Combination of multiple cost factors	6	40
Total	15	100

Source: Primary Data

Analysis of producer responses regarding the main reasons behind higher pricing in sustainable fashion revealed that **40 percent attributed it to high raw material costs**, while **13.33 percent cited ethical labour wages**, and **6.67 percent identified certification/branding costs** as a contributing factor. Notably, **40 percent of**

respondents selected a combination of multiple cost factors, indicating that pricing pressures often stem from overlapping structural and ethical considerations.

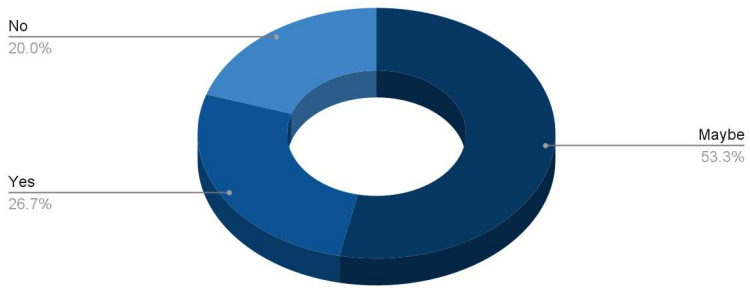
The prominence of raw material-related costs aligns with the use of eco-friendly, organic, or recycled fabrics which are priced higher than conventional substitutes. Ethical labour wages highlight the social sustainability dimension, reflecting fair compensation for workers within the production chain. Certification and branding costs represent the need for legitimacy, market signaling, and differentiation in a sector characterized by greenwashing concerns.

The large proportion selecting multiple factors suggests that premium pricing in sustainable fashion is **not driven by a single cost determinant**, but rather by a **compound cost structure** tied to sustainability-driven production practices. This complements consumer-side findings where higher prices emerged as a central barrier, highlighting a structural price–value tension between production and consumption.

4.2.19 CONSIDERATION OF LOWERING PRICES TO INCREASE SALES VOLUME

This question was included to check if producers are open to lowering prices.It helps understand chances of price reduction.

Figure 4.17 – Producer willingness to adjust pricing strategies



Source: Primary Data

When asked whether they have considered lowering prices to increase sales volume, **53.3 percent of producers responded 'Maybe'**, **26.7 percent responded 'Yes'**, and **20.0 percent responded 'No'**.

The predominance of conditional ("Maybe") responses indicates strategic ambivalence among producers. On one hand, lowering prices could potentially stimulate market penetration, expand consumer base, and improve sales frequency. On the other hand, high production costs associated with ethical sourcing, sustainable materials, and small-batch manufacturing limit the financial feasibility of discount-based strategies.

The share of producers responding "Yes" demonstrates recognition of price-based competition, while the minority rejecting price adjustments suggests either strong brand positioning, niche targeting, or access to higher-income customer groups less sensitive to price premiums.

Overall, pricing emerges as an active strategic negotiation space where producers must balance profitability with accessibility in a developing sustainable fashion market.

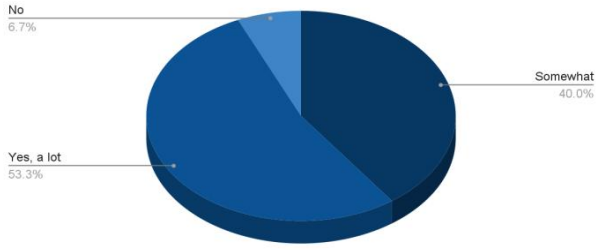
SECTION E – CHALLENGES AND BARRIERS

The challenges and barriers reveal the main difficulties faced by the sustainable fashion producers in Kochi. It looks at whether they experience competition from fast fashion products, the lack of government support or incentives. The section also explores the biggest factor limiting their growth such as low consumer interest, small market size, supply chain problems, or high costs. By combining these we can see this section where it explains the practical obstacles that slow down the expansion of sustainable fashion, showing the pressures the producers deal with while trying to grow and strengthen their presence in Kochi's fashion industry.

4.2.20 COMPETITION FROM FAST FASHION

This indicator was included to evaluate market pressure. To check if fast fashion affects sustainability adoption.

Figure 4.18 – Producer perception of competitive pressure from non-sustainable brands



Source: Primary Data

Producers were asked whether they face competition from non-sustainable (fast fashion) products. The responses showed that **53.3 percent answered 'Yes'**, **40.0 percent responded 'Somewhat'**, and **6.7 percent responded 'No'**.

The majority view indicates that fast fashion constitutes a significant competitive force for sustainable fashion businesses in Kochi. Fast fashion brands typically operate on rapid production cycles, wide trend variety, and low price points—advantages that can attract consumers despite growing ethical and environmental concerns.

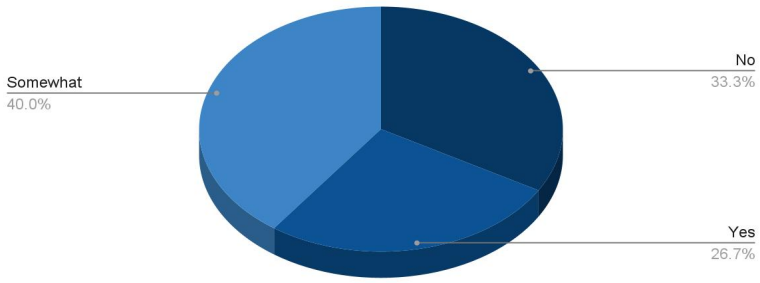
The presence of "Maybe" responses suggests that competitive pressure may be segment-specific, affecting certain product categories (e.g., casualwear) more than others (e.g., artisanal or luxury slow fashion). The small minority reporting no competition may indicate highly differentiated brands that occupy niche markets with loyal customer bases less influenced by fast fashion substitution.

Overall, the findings highlight a **structural market tension between sustainability and affordability**, wherein fast fashion's economies of scale continue to challenge the growth and mainstream adoption of sustainable fashion.

4.2.21 GOVERNMENT INCENTIVES FOR SUSTAINABLE FASHION

This question was included to assess policy support. As incentives influence business growth.

Figure 4.19 – Availability of policy and institutional support



Source: Primary Data

Producers were asked whether there is a lack of government incentives supporting sustainable fashion. The responses indicated that **40.0 percent selected 'Somewhat'**, **33.3 percent responded 'No'**, and **26.7 percent responded 'Yes'**. The predominance

of neutral responses suggests uncertainty among producers regarding existing governmental support mechanisms, indicating a potential information gap about available schemes, subsidies, or policy frameworks. This may reflect weak communication channels between government bodies and small to mid-sized sustainable fashion enterprises.

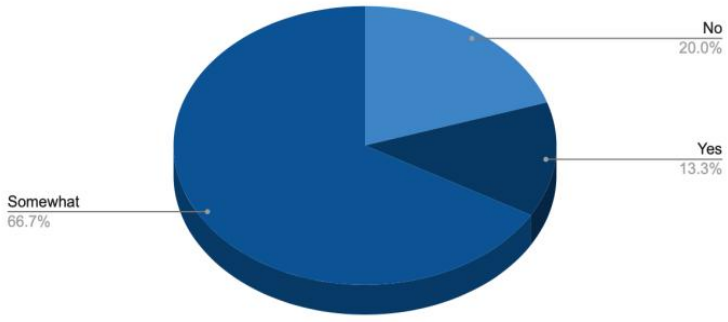
The share of producers affirming a lack of incentives indicates perceived policy insufficiency, particularly relating to cost reduction, raw material access, certification, or capacity-building support. Conversely, the minority reporting "No" may represent producers less dependent on policy incentives or those better informed about existing programs.

Overall, the findings suggest that the **policy environment for sustainable fashion remains underdeveloped and partially opaque**, signaling an area where government intervention could enhance sector growth, competitiveness, and accessibility.

4.2.22 DIFFICULTY IN PROVING SUSTAINABILITY CLAIMS TO CUSTOMERS

This indicator was included to assess trust issues between consumer and producer. Transparency affects consumer confidence.

Figure 4.20 – Challenges in communicating and verifying sustainability attributes



Source: Primary Data

When asked whether they find it difficult to prove the authenticity of their sustainability claims to customers, **66.7 percent of producers responded 'Somewhat'**, **20.0 percent responded 'No'**, and **13.3 percent responded 'Yes'**. The dominance of neutral responses indicates that verification challenges may be situational rather than universal,

varying across customer segments, retail channels, or product types. It also reflects the complexity of communicating sustainability attributes that are often intangible (e.g., eco-friendly sourcing, ethical labour practices, lower environmental impact) and require explanation, certification, or transparency mechanisms.

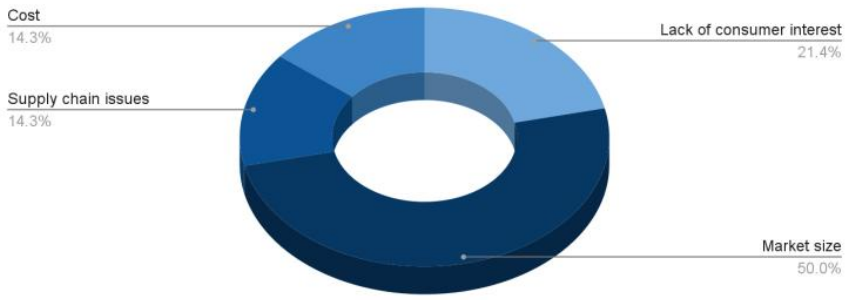
The minority indicating clear difficulty underscores the presence of informational asymmetry between producers and consumers, where consumers may lack technical knowledge or familiarity with sustainability indicators. Meanwhile, the share reporting no difficulty may reflect brands with established customer trust, strong transparency practices, or direct producer–consumer relationships that reduce skepticism.

Collectively, these findings align with consumer-side insights where uncertainty—not outright distrust—shaped perceptions of sustainability claims, highlighting the need for **better certification, labelling, and communication tools** to reduce ambiguity and strengthen market credibility.

4.2.23 FACTOR LIMITING THE EXPANSION OF SUSTAINABLE FASHION BUSINESSES

This question was included to identify growth constraints. It explains slow sector expansion.

Figure 4.21– Primary constraints restricting business scale-up



Source: Primary Data

When asked which single factor most limits their expansion in sustainable fashion, **50.0 percent of producers identified market size**, followed by **lack of consumer interest (21.43 percent)**, and **supply chain issues and cost (each 14.3 percent)**.

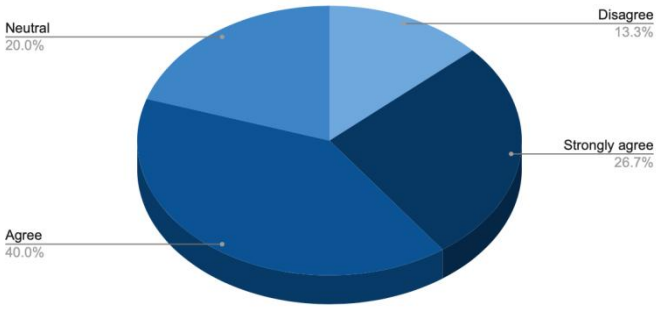
The predominance of market size suggests that the sustainable fashion sector in Kochi remains emerging and niche, with insufficient scale to support larger production capacities or diversified product lines. This limitation aligns with earlier demand-side insights, wherein consumer purchasing remained infrequent and price-sensitive. The identification of lack of consumer interest reinforces the finding that awareness alone does not directly translate into consumption, indicating an **awareness–adoption gap** within the local market.

Overall, the results indicate that sustainable fashion business expansion is constrained more by **market maturity and demand-related factors** than by internal business challenges alone, underscoring the need for ecosystem-level development, consumer education, and sectoral support mechanisms.

4.2.24 POLICY ENFORCEMENT FOR SUSTAINABILITY STANDARDS

This indicator was included to assess regulatory attitudes. Policy can standardise sustainability practices.

Figure 4.22 – Producer opinions on government regulation of sustainability



Source: Primary Data

Producers were asked whether they believe government policies should enforce sustainability standards in the fashion industry. The findings show that **40.0 percent of producers agreed**, followed by **26.67 percent who strongly agreed**, **20.0 percent who were neutral**, and **13.33 percent who disagreed**. The predominance of agreement (combining 'Agree' and 'Strongly agree') suggests that most producers view government regulation as a mechanism to institutionalize sustainability practices, create competitive parity, and reduce ambiguity around sustainability claims. Regulatory enforcement may also provide clearer operational guidelines, mitigate green washing,

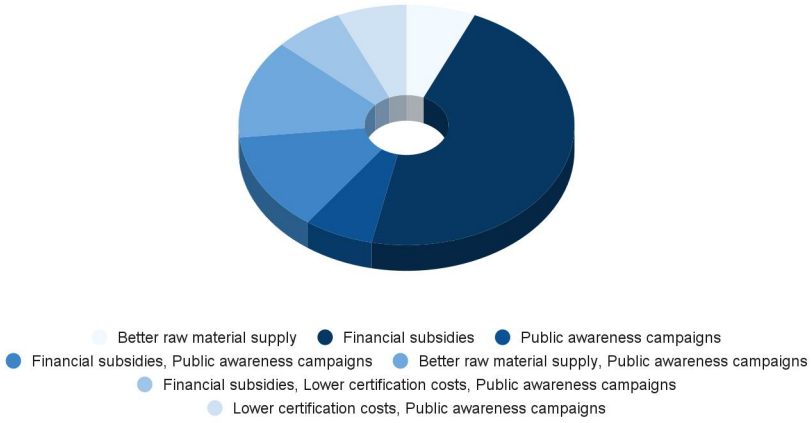
and standardize industry practices. The presence of neutral responses indicates uncertainty regarding the role of government intervention, potentially due to limited awareness of policy implications, implementation mechanisms, or existing regulatory frameworks. The minority disagreement suggests that some producers may favor voluntary sustainability practices or market-driven adoption rather than state-imposed mandates.

Overall, the findings indicate general support for regulatory engagement, reflecting a nuanced producer perspective on the balance between government policy, industry autonomy, and market forces.

4.2.25 SUPPORT REQUIRED FOR GROWTH OF SUSTAINABLE FASHION BUSINESSES

This question was included to find out what support producers need. It helps understand where assistance is required.

Figure 4.23 – Forms of support producers consider essential for sectoral development



Source: Primary Data

When asked what kind of support would help their businesses grow in the sustainable fashion sector, **66.67 percent of producers selected financial subsidies**, followed by **public awareness campaigns (53.33 percent)**, **better raw material supply (20.00 percent)**, and **lower certification costs (13.33 percent)**. Multiple responses were allowed.

The predominance of financial subsidies indicates that high production costs remain the most significant constraint to scaling sustainable fashion, consistent with earlier findings on pricing barriers and limited competitiveness against fast fashion. Subsidy-based support, such as grants, tax reductions, or low-interest financing, would reduce structural cost burdens and improve price accessibility for consumers.

The strong emphasis on public awareness campaigns reflects producer recognition of a market-side maturity gap, wherein consumers may be aware of sustainability as a concept but not yet fully committed to sustainable purchasing. Awareness campaigns could help narrow the **awareness–adoption gap**, improving market demand and expanding consumer segments.

Requests for better raw material supply and lower certification costs point to supply-chain and institutional bottlenecks within sustainable fashion, suggesting that improved sourcing infrastructure and more accessible certification mechanisms would enhance both credibility and production efficiency.

Overall, the findings suggest that sustainable fashion business growth requires **multi-dimensional ecosystem support**, including economic incentives, market education, supply-chain strengthening, and institutional facilitation, rather than isolated firm-level strategies.

4.2.26 MOST IMPORTANT STEP TO INCREASE MARKET POTENTIAL OF SUSTAINABLE FASHION IN KOCHI

This open-ended question was included to capture producer insights. It provides strategic direction for market development.

When asked open-endedly about the most important step to increase the market potential of sustainable fashion in Kochi, producers identified several recurring themes. The most frequently highlighted strategy was **consumer awareness and education**, emphasizing that the market remains under-informed regarding sustainability benefits, production ethics, and pricing rationale.

Producers also stressed the need for **style competitiveness and stronger product aesthetics**, noting that consumers primarily evaluate fashion based on desirability rather than sustainability attributes. Enhancing **pricing accessibility and availability** was also

mentioned, reflecting the perception that sustainable fashion must compete with fast fashion on both economics and convenience.

Additional suggestions included improving **transparency and trust**, addressing concerns related to sustainability claims, and leveraging alternative market channels such as **tourism**. Overall, the responses suggest that increasing market potential requires a combination of **demand-side development (awareness, desirability, pricing)** and **institutional trust-building**.

One producer offered a particularly insightful observation on this point, remarking:

> ***"As business owners, we need to make sustainable fashion more accessible through better pricing, wider availability, and stronger marketing and product design. Sustainable brands should compete directly with fast-fashion brands by doing what they do best: offering timeless designs and exceptional workmanship. Once the basic function of a garment, covering the body, is fulfilled, what truly drives purchase is aesthetics. If people want the product for its beauty and uniqueness, sustainability will follow naturally."***

4.3 CONCLUSION

This chapter examined sustainable fashion practices and market perceptions among producers in Ernakulam. Most firms demonstrated a multidimensional understanding of sustainability and implemented practices such as recycling, low-waste production, and responsible material sourcing. Despite this commitment, producers face challenges related to cost pressures and uncertain demand shaped by consumer price sensitivity. The sector largely comprises small and medium enterprises balancing ethical production with market viability. The findings suggest that sustainable fashion production has a stable local base, but broader scalability depends on stronger consumer awareness, institutional support, and improved alignment between pricing and market expectations.

CHAPTER 5

FINDINGS, RECOMMENDATIONS AND CONCLUSIONS

5.1 INTRODUCTION

This chapter presents the consolidated findings, conclusions, and recommendations of the study titled *Market Potential and Consumer Awareness of Sustainable Fashion: A Study Based in Kochi*. The analysis in this chapter is derived from the interpretation of primary data collected from consumers and producers, which was discussed in detail in Chapter III and Chapter IV respectively. By integrating insights from both perspectives, this chapter provides a balanced understanding of the sustainable fashion market in Kochi.

Sustainable Fashion has emerged as a reaction to the environmental and social consequences of conventional Fast Fashion. The topic of Sustainable Fashion has been discussed globally in terms of sustainability, however at the local market level, it relies upon consumer awareness and perceptions, affordability and the operational realities experienced by producers to be adopted. In Ernakulam, sustainable fashion is developing as a market segment rather than being a developed product category; due to inconsistent demand, price sensitivity, and limited access to the product.

The findings section highlights key patterns related to consumer awareness, purchasing behaviour, willingness to pay, and factors influencing the adoption of sustainable fashion. At the same time, it summarises producer perspectives on sustainability practices, pricing decisions, market demand, and operational challenges. Together, these findings help identify the existing gap between consumer awareness and actual market performance.

Based on these observations, the chapter draws overall conclusions regarding the current status and future potential of sustainable fashion in Kochi. It also presents practical recommendations aimed at addressing key issues such as high pricing, limited accessibility, lack of consumer trust, and the need for institutional and policy support. The chapter thus serves as a concluding section that links empirical findings with actionable suggestions for strengthening the sustainable fashion market.

5.2 FINDINGS

Consumer-Side Findings

• The consumer survey revealed that awareness of sustainable fashion in Kochi is largely concentrated among younger respondents. A majority of respondents (76.7

percent) belonged to the 18–25 age group, and 73.3 percent were students. While this group showed higher exposure to sustainability discussions and digital content, their purchasing behaviour was limited due to low financial independence, as 66.7 percent reported having no personal income.

• Awareness of sustainable fashion as a concept was relatively high, with 73.3 percent of respondents stating that they had heard of it. However, deeper understanding remained limited, as only 6.7 percent reported having very good knowledge, while 66.7 percent indicated only basic understanding. This shows that sustainable fashion is recognised in name but not fully understood in terms of practices and impact.

• Social media emerged as the most influential source of awareness, accounting for 36.2 percent of responses, followed by brand websites and news platforms. This highlights the dominance of digital media in shaping consumer perceptions, while structured learning sources such as workshops and events contributed very little to consumer education.

• Actual purchasing behaviour showed weak adoption of sustainable fashion. A majority of respondents (61.3 percent) purchased sustainable fashion products rarely, while 16.1 percent had never purchased them. The absence of frequent buyers indicates that sustainable fashion has not yet become a routine or habitual choice among consumers.

• Price sensitivity played a decisive role in purchase decisions. While 32.3 percent of respondents were willing to pay up to 10 percent more for sustainable fashion products, 25.8 percent were unwilling to pay any premium. Additionally, 64.5 percent stated that they would purchase more sustainable fashion if prices were reduced, clearly identifying price as the strongest demand constraint.

• The main reasons for avoiding sustainable fashion included high prices (41.4 percent), uncertainty about the authenticity of sustainability claims (17.2 percent), and limited design or style options (12.1 percent). These findings indicate that economic barriers are reinforced by trust-related and aesthetic concerns.

• Despite existing challenges, consumers showed optimism about future market growth. About 45.2 percent of respondents expected demand for sustainable fashion to increase over the next five years, while the remaining respondents were uncertain. Importantly, none expected demand to decline, suggesting positive long-term market sentiment.

Producer-Side Findings

• The producer survey showed that sustainable fashion businesses in Kochi operate across multiple stages of the supply chain. Manufacturers and retailers each accounted for 33.3 percent of respondents, indicating balanced participation at both production and market-facing levels within the sustainable fashion sector.

• Most producers (60 percent) had been operating for more than five years, suggesting that sustainable fashion in Kochi is a steadily developing sector. However, business size remained limited, with 46.7 percent employing only 1–5 workers, reflecting small-scale and boutique-style operations.

• Despite limited workforce size, financial performance was encouraging. About 40 percent of producers reported annual revenues above ₹1 crore, indicating that sustainable fashion businesses can achieve commercial viability even with higher production costs and ethical practices.

• Producers demonstrated strong commitment to sustainability. Around 80 percent were aware of sustainable fashion before starting their business, and 40 percent reported that 76–100 percent of their total production was sustainable. Common practices included recycling and upcycling (25.6 percent), low-waste production (23.1 percent), and use of organic or natural fabrics (20.5 percent).

• From a market perspective, demand was perceived as moderate by 46.7 percent of producers. The main consumer group driving actual purchases was adults aged 26–40 years (53.3 percent), indicating that financially independent consumers form the core demand base rather than younger, awareness-driven groups.

• Pricing emerged as the most significant operational challenge. Most producers priced sustainable products 10–40 percent higher than conventional fashion, mainly due to high raw material costs (40 percent) and the combined impact of multiple cost factors (40 percent), including ethical labour wages and certification expenses.

• Competition from fast fashion was identified as a major concern, with 53.3 percent of producers reporting direct competition from non-sustainable brands. Additionally, 50 percent identified limited market size as the primary constraint to expansion, indicating demand-side limitations rather than lack of producer interest.

5.3 RECOMMENDATIONS

• Pricing-related support should be prioritised to improve the market potential of sustainable fashion in Kochi. Since high prices were identified as the main barrier by both consumers and producers, financial support such as subsidies, tax relief, or low-interest loans can help reduce production costs and improve affordability.

• Consumer awareness initiatives should focus on improving understanding rather than only increasing visibility. Awareness programs should clearly explain sustainable materials, ethical labour practices, and long-term benefits through college programs, digital campaigns, and local workshops to encourage informed purchasing decisions.

• Clear and standardised certification and labelling systems should be strengthened to reduce consumer uncertainty and address concerns related to greenwashing. Transparent product information and trusted certification marks can build confidence and improve repeat purchasing behaviour.

• Sustainable fashion producers should place greater emphasis on product variety and contemporary design. Since consumers value aesthetics along with sustainability, offering fashionable, trend-relevant designs can help sustainable brands compete more effectively with fast fashion.

• Accessibility of sustainable fashion products should be improved by expanding physical retail presence and strengthening online platforms. Increased participation in exhibitions and pop-up stores can also help improve visibility and consumer access.

• Government intervention is essential for long-term sector development. Enforcing sustainability standards, reducing certification costs, and improving access to sustainable raw materials can create a supportive ecosystem for sustainable fashion businesses.

• Collaboration among producers, designers, educational institutions, and policymakers should be encouraged. Collective efforts in awareness building, innovation, and cost reduction can help transform sustainable fashion in Kochi from a niche segment into a more mainstream market.

5.4 CONCLUSION

The study concludes that sustainable fashion in Kochi exhibits a clear gap between awareness and actual consumption. While consumers, particularly younger groups, are aware of sustainable fashion and express positive attitudes, purchasing remains infrequent due to price sensitivity, limited income, and concerns about authenticity. Sustainable fashion is viewed as desirable but not yet essential.

From the producer perspective, businesses show strong commitment to sustainability and have adopted multiple eco-friendly practices. However, high production costs, small market size, and intense competition from fast fashion limit their ability to scale operations or reduce prices. Producers depend heavily on adult consumers with higher purchasing power, confirming the mismatch between awareness-driven youth interest and demand-driven adult consumption. Overall, sustainable fashion in Kochi has strong long-term potential, but its transition from a niche market to a mainstream segment depends on improved affordability, stronger consumer trust, and institutional support.

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APPENDIX

I CONSUMERS QUESTIONNAIRE

SECTION A - RESPONDENT DETAILS

1. Age
   A. 18-25
   B. 26-35
   C. 36-50
   D. 51-70
2. Gender
   A. Female
   B. Male
   C. Prefer not to say
3. Occupation
   A. Student
   B. Working professional
   C. Homemaker
   D. Retired
   E. Other
4. Personal monthly income
   A. No personal income
   B. Less than 10,000
   C. 10,000-30,000
   D. 30,000-50,000
   E. Above 50,000
5. Education qualification
   A. Below 10^{th}
   B. 10^{th} -12^{th}
   C. Undergraduate
   D. Postgraduate
   E. Other

SECTION B - CONSUMERS AWARENESS AND UNDERSTANDING

6. Have you heard of "Sustainable fashion "before?
   A. Yes
   B. No
7. How would you describe your understanding of sustainable fashion?
   A. Very good understanding
   B. Basic understanding
   C. Not sure is its meaning
   D. Not aware at all
8. From which sources have you learned about sustainable fashion?
   A. Social media
   B. Friends /Family
   C. Advertisements

D. News /Magazines
E. Brand websites
F. Workshop /Events

9. Which aspect of sustainable fashion are you aware of?
   A. Eco – friendly fabrics
   B. Ethical labor practices
   C. Recycling
   D. Mini packaging
   E. Local production
   F. None of these

SECTION C - MARKET POTENTIAL AND PURCHASE BEHAVIOR

10. How often do you buy sustainable fashion products?
    A. Regularly
    B. Occasionally
    C. Rarely
    D. Never
11. If given a choice, how likely are you to choose sustainable fashion over conventional fashion?
    A. Very likely
    B. Somewhat likely
    C. Neutral
    D. Not likely
12. What price range are you comfortable paying for sustainable clothing compared to regular clothing?
    A. Same
    B. Up to 10 percent higher
    C. 10 -30 percent
    D. More than 30 percent higher
    E. Not willing to pay extra
13. Would you buy more sustainable fashion if price were lower?
    A. Yes
    B. Maybe
    C. No
14. What factors influence your purchase of sustainable fashion?
    A. Brand reputation
    B. Ethical labor
    C. Price affordability
    D. Environmental impact
    E. Design /style
    F. Quality /durability
15. Do you prefer buying sustainable fashion from local brands or international brands?
    A. Local brands
    B. International brands
    C. No preference

16. Which product category would you most likely buy in sustainable fashion?
    A. Sportswear
    B. Footwear
    C. Everyday wear
    D. Accessories
    E. Formal wear

SECTION D – CHALLENGES AND BARRIERS

17. What are the main reasons you might avoid buying sustainable fashion?
    A. Unsure about authenticity
    B. High price
    C. Limited design/ style
    D. Habit of buying fast fashion
    E. Limited availability
18. Have you ever found misleading claims about sustainability (green washing : when a company falsely presents its products or practices as environmentally friendly to mislead the public)/
    A. Yes ,often
    B. Sometimes
    C. Rarely
    D. Never
19. Would better labeling and certification make you more likely to buy sustainable fashion products?
    A. Yes
    B. Maybe
    C. No
20. What are the challenges faced while shopping for sustainable fashion in kochi?
    A. Limited store option
    B. High price
    C. Lack of product information
    D. Lack of awareness
    E. Not sure where to buy
21. Do you think sustainable fashion is only higher- income consumers ?
    A. Strongly agree
    B. Agree
    C. Neutral
    D. Disagree

SECTION E – FUTURE OUTLOOK AND RECOMMENDATIONS

22. Do you expect demand for sustainable fashion to grow in the next 5 years?
    A. Yes
    B. Maybe
    C. No
23. Which action by brands would most encourage you to buy sustainable fashion?
    A. More store location
    B. Lower price

C. Better design / styles
D. Clear certificate label
E. Celebrity endorsement

24. Consumer suggestions for promoting sustainable fashion in Kochi.

II PRODUCERS QUESTIONNAIRE

SECTION A -BUSINESS PROFILE

1. What type of business?

A. Wholesaler
B. Retailer
C. Manufacturer
D. Designer/brand owner

2. How many years in business?

A. Less than 1 years
B. 1-3 years
C. 3-5 years
D. More than 5 years

3.How may employees?

A. 1-5
B. 6–20
C. 21-50
D. 51+

4. What is the annual revenue?

A. Less than ₹10 Lakh
B. ₹10-50Lakh
C. ₹50Lakh-₹1 crore
D. Above ₹1crore

5. What are the main categories in your business?

A. Accessories
B. Every day wear
C. Formal wear

SECTION B- AWARENESS AND ADOPTION OF SUSTAINABLE PRACTICES

6.Have you heard of 'sustainable fashion' before starting your business?

A. Yes
B. No

7. Do you currently produce sustainable fashion?

A. Yes, fully
B. Yes, partially
C. No

8. How would you describe sustainable fashion?

A. Recycling/upcycling
B. Ethical labour
C. Not sure
D. All of the above

9. Which sustainable practices do you follow?

A. Recycling/ Upcycling
B. Organic/ natural fibers
C. Ethical wage for workers
D. Low- waste production
E. Minimal packaging
F. Other

10. When did you start implementing sustainable practices?

A. From the start of business
B. Recently (less than 1 year)
C. From 1 to 3 years

SECTION C- MARKET POTENTIAL AND DEMAND PERCEPTION

11.What percentage of your total products?

A. 0-25 percent
B. 26-50 percent
C. 51-75 percent
D. 76-100 percent

12.How would you rate current demand for sustainable fashion in kochi?

A. Very High
B. High
C. Moderate

13. Which customer buys sustainable products the most?

A. Young Adults (18-25)
B. Adults (26-40)
C. Middle age (41-60)

14. Do customers ask specifically For sustainable products?

A. Yes, Frequently
B. Sometimes
C. Rarely

15. How do customer's usually learn about sustainable products?

A. Social media
B. In-store promotion
C. Events/exhibitions
D. Word of mouth
E. other

SECTION D- PRICING AND SALES STRATEGY

16. How do your sustainable products compare in price to regular products?

A. 10-20 percentHigher
B. 20-40 percentHigher
C. Same price

17. How many customers are willing to pay for sustainable products ?

A. Yes
B. Moderate
C. No

18. What are the main factors behind higher pricing of sustainable products?

A. High raw material waste
B. Ethical labour wage
C. Certification /branding cost
D. Combination of multiple cost factors

19. Have you considerd lowering prices to increase sales volume?

A. Yes
B. B.Maybe
C. No

SECTION E- CHALLENGES AND BARRIERS

20. Do you face competition from non sustainable (Fast fashion)products?

A. Yes
B. Maybe
C. No

21. Is there a lack of government incentives for sustainable fashion?

A. Yes
B. Maybe

C. No

22. Do you find difficult to prove the authenticity of your sustainability claims to customers?

A. Yes
B. Maybe
C. No

23. Which factor most limits your expansion in sustainable fashion?

A. Lack of consumer interest
B. Market size
C. Supply chain issues
D. Cost

SECTION F -FUTURE OUTLOOK AND BUSINESS PLANS

24. Do you think government policy should enforce sustainability standards?

A. Strongly Agree
B. Agree
C. Neutral
D. Disagree

25. What kind of support would help your business grow in sustainable fashion?

A. Lower certificate cost
B. Public awareness campaign
C. Better raw material supply
D. Financial subsidies

26. In your opinion what is the most important step to increase market potential of sustainable fashion in kochi