Growing Consciousness of Slow Fashion in India

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Submission Date: 19th October, 2020

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ACKNOWLEDGEMENT

I would like to show my gratitude towards my Research Methodology professor, Ms. Prity Mallick, who has continuously guided and helped me to keep on improving my research project in order to know the main gap area and work on it. I am also thankful to her for her continuous support and motivation that helps me to work further and keep on improving the survey and the outcomes of the survey.

I am also thankful to the participants who took time and have filled out the questionnaire that have helped me to continue with my questionnaire and the survey.

ABSTRACT

The research paper on "Growing Consciousness of Slow Fashion In India" would identify the change in consumer behavior due to COVID-19 in India.. The main gap area identified is that earlier, before COVID, consumers supported the idea of sustainability, but not when applied to fashion products. Due to this, sustainability & slow fashion concepts had taken a backseat. But, the current pandemic made the consumers more conscious of their health. Hence, there is a need to address the problem and make the entrepreneurs (to be or existing) realize the importance of the concept and take up slow fashion or incorporate sustainable measures in their businesses.

Objectives: The purpose of the research paper is to analyze the impact COVID-19 on the fashion industry in India and understand the change in consumer behavior.

Scope of the project: The scope of the study is to identify the change in consumer behavior due to COVID-19. The research paper also covers the pre COVID scenario in India and the fashion consumer behavior before COVID. Overall, it consists of various parameters which have occurred due to COVID-19 that have paved way for the growth of Slow Fashion in India.

Methodology used: A simple random sampling survey is done to observe the changes in fashion consumer behavior due to COVID-19. The sample size is male, female and transgender in Kolkata. The participants were told about introduction, demographic questions, pre COVID and COVID impact questions. The form was then created on Google forms and circulated through social media.

Major findings and conclusions: Most of the consumers who were frequent buyers before the pandemic are now become conscious and value money. They have started thinking ethically and are interested in knowing about the materials used, the impact of their buying on environment and workers. The consumer's attitude is slowly shifting towards slow fashion and majority of them chose to buy handloom apparels over branded apparels.

Major recommendations or suggestions for improvement: The research could be further expanded and include other Indian cities to have a more accurate analysis of consumer behavior. Also, other segments of the fashion industry that were impacted by industry could be studied in further research. Also, interviews of the artisans, workers and fashion consumers could also be taken for the study.

CHAPTER 1

INTRODUCTION

A renowned fashion designer and recipient of an environmental award, Eileen Fischer is reported to have said, ‘The clothing industry is the second largest polluter in the world ... second only to oil’ (Sweeny 2015).

And, it is true as Fashion is identified as one of the most polluting industries. Supply chain exploitations and inequalities have been brought to the fore through awareness campaigns by platforms like Fashion Revolution and debates at the annual Copenhagen Fashion Summit. The fashion industry’s culpability has been unmasked. Exploitation of garment workers in developing nations, the deplorable conditions of sweatshops, inequitable opportunities and earnings for female workers, child labour, absence of basic safeguards for health and worker safety, the use of toxic dyes and exotic animal skins—fashion bleeds with these concerns. The slip is showing. (Vasudev, 2020)

But, the question is, where does India stand in this context?

India is not just another link in the world’s fashion supply chain. Its value and distinction is critical compared to manufacturing hubs in other developing economies given the uniqueness of our crafts industries that global and Indian fashion relies on.

Over the years, and with the growing awareness and need for sustainability, the Indian Textile Ministry has acknowledged the need for sustainability has also taken measures like the SU.RE project in order to support it. But, the challenge to incorporate sustainable measures and eradicate harmful textiles and their production is difficult than it seems.

The rising disposable income has given rise to frequent clothing purchases. Consumers, on an average, buy apparel eight to ten times a year now as compared to a few years ago, when it was lesser than half a dozen times. This is making fast fashion more relevant as retailers change their stock several times a year, and are thus, able to provide latest fashion merchandise all through the year. The fast fashion consumers have low level of environmental concern and are more concerned with being “on trend” at lower prices. They experience barriers to knowledge and awareness as they may not have enough knowledge to know where to shop for environmental products and did not feel that it was urgent enough to do the research. Some Fast fashion consumers supported environmental issues but practiced unsustainable apparel consumption behavior. They supported the idea of sustainability but not when it applied to fashion products; the newness and low cost of products encouraged consumption. The growing needs of consumers for cheap affordable products resulted in detrimental impact on workers, environment and the handloom sector. (Preuit, 2016)

Labor is critical to the sector’s current competitiveness and long-term viability. Workers’ skill levels, productivity and motivation, the industry’s ability to attract and retain the right quantity and quality of workers, domestic labor laws and regulations and workers’ living conditions and costs in urban areas, are all critical in the context of a continuously changing economic environment. In South Asia and other emerging economies, where low-cost labor is essential for industry competitiveness, the garment industry has been subject to various allegations of labor abuse, including long hours, forced overtime and low wages. (Caroline O’Reilly, 2015)

Today textile industry has been globalized and to sustain in the global market overall growth of the Indian textile sector becomes factor of utmost importance. However, the growth should not be at the expense of environment. The growth of textile sectors is enabled and facilitated by increasing use of material leading to manifold impacts on the environment. The chemically polluted textile wastewater degrades the quality of the soil and water when it mixes with these natural resources and its dependent habitats and environment. The fashion industry emits a hefty amount of greenhouse gases per year, thus contributing massively and actively to global warming. One of the reasons is that most of the clothes are petroleum-based and made from fossil fuels, including polyester, acrylic & nylon. (Bielawski, 2019)

The Indian textile and apparel industry is enriched with vivid and prosperous treasure of textile crafts and designs, though the craftsmen may be well skilled and equipped or lacking both. For centuries, communities throughout India have specialized in textile traditions that are specific to their region, such as patchwork, block print and embroidery.

Yet, there are challenges in the handloom sector which acts as barriers for the industry to progress towards slow and sustainable fashion.

The increase in the cost of materials has severely impacted upon the Indian handcrafted textile industries particularly as customers are not prepared to pay more - including foreigners. To remain competitive the extra material costs tend to be absorbed into the original price of the product. Unfortunately it's the artisans who suffer by receiving less money for their work. Changing dress preferences and competition from machine-made products also has affected the incomes of the artisans. (Emmet, 2014)

This is how the industry looked before COVID. After that, the industry and consumer behavior completely changed. In December 2019, the Corona virus broke out and it impacted the countries worldwide leading to lockdowns, sudden disruptions of business making the global economy come on standstill. It has impacted every industry, every sector, every business.

1.1 COVID IMPACT

The Fashion Industry is in a financial stress due to the pandemic which has led to shut down of businesses and huge losses to big fashion houses. The fashion industry has been hard hit which has made every aspect of the industry wrung out to dry. The businesses that were already at a loss before the pandemic have been swiped off by the pandemic according to the term Darwinian Shakeout (Company, 2020) . This has resulted in increased unemployment worldwide and in India as well. The workers have been furloughed without any wages paid and forced to go back to their homes . Also, the artisans working in the handloom sector which is considered as our cultural heritage has been in misery due to sudden disruption of orders leading to non-payments of orders and lack of ability to get credits from banks.

Adding to the crisis, the rising border tensions across the India-China border near the Pangong Lake, Ladakh. The Government announced ban on Chinese apps in order to safeguard the national sovereignty, security and integrity. Including these apps, were the Chinese fashion brand apps (Shein, Clubfactory) which were quite popular among mass consumers because of the stylish and trendy clothes and accessories that it provided at cheap affordable prices. Also, the rising tensions have impacted textile imports from China to India. India is dependent on China right across the entire textile value chain, starting with raw materials for textile production, the synthetic yarn, the fabric and even the final product, be it garments or home textiles. In 2019, China exported around 41,000 tonnes of PTA to India. India imports $460 million worth of synthetic yarn mills used to make fabric and $360 million worth of synthetic or man-made fabric from China annually. It also imports over $140 million worth of accessories like buttons, zippers, hangers and needles. (Punj, 2020)

But, on the other hand, the ban and the growing border tensions along with COVID crisis, have made the consumers including influencers to look upon the Indian or homegrown brands that were quite neglected earlier. Apart from this, a major shift has taken place in consumer behavior. From research, it has been observed that there has been an increase in consumer consciousness all over the world. In India, consumers are more interested to know who made their clothes and how it was manufactured. They are demanding comfort, reliability and transparency. Deepika Deepti, CEO of Bhaane said, “There is a shift of interest and preference towards mindful design, transparency, and conscious consumerism, which is encouraging and honestly, much needed”. (Alwani, 2020)

1.2 POST COVID

Keeping the pre COVID and current COVID scenario, it can be said that that COVID in a way has brought in opportunities for slow fashion to thrive in India. People understand the rising need to safeguard their health and to have value for money. Also due to bitter relations with China, the ban of fashion brand apps, halt in imports of synthetic yarn from China has served as opportunity for Slow Fashion and homegrown brands to grow in India. This would in turn help in giving employment to workers and artisans with fairer wages. Keeping all the aspects discussed in mind with the changing scenario, it can be said that slow fashion could be the new future of Industry. The need is to make the consumers realize the importance of the concept and that would persuade the brands to take up slow fashion or take steps towards slow fashion.

One could possibly argue that cotton could be chosen instead of organic cotton or natural fabrics which are way too expensive as compared to cotton. Though both of them provide comfort, yet organic cotton is way too comfortable. Also, slow fashion as a concept supports a fairer and healthier working condition which is not the case in a cotton factory. Also, organic cotton requires less water, saves natural resources and helps the environment to sustain its natural beauty. Slow fashion reduces the carbon footprint as they use materials from natural or recycled fabrics that require significantly less to no chemical treatment, little water, less energy and no fertilizers or pesticides to grow.

1.3 STATEMENT OF RESEARCH PROBLEM

Through research, it is been observed that, in India, before the pandemic, most of the brands followed the model of Fast Fashion in their businesses because consumers were completely driven by the affordability and trend that the Fast fashion provided. Consumers supported the idea of sustainability, but not when applied to fashion products. Due to this, sustainability & slow fashion concepts had taken a backseat.

But, the current pandemic and India – China relations has impacted the fast fashion industry and made the consumers more conscious of their health. And, this could be seen as an opportunity for the existing and future Slow Fashion brands to give momentum and use it as an advantage to push sustainability forward.

Hence, there is a need to design a research paper that addresses the problem and make the entrepreneurs (to be or existing) realize the importance of the concept and take up slow fashion or incorporate sustainable measures in their businesses.

1.4 OBJECTIVES OF THE STUDY

The purpose of the research paper is to analyze the impact COVID-19 on the fashion industry in India and understand the change in consumer behavior in order to provide sustainable ideas or solutions that could provide as a bright prospect for the concept of slow fashion in India. So, the main question for this research paper is:

In India, how COVID'19 has opened windows for the new era of responsibility in Fashion?

1.5 IMPORTANCE OF RESEARCH

The importance of the research paper is to understand the impact of COVID-19 and India – China relations on the fashion Industry in India. Also, to explain how it has served as an opportunity for Slow Fashion brands to grow in India. The rising consciousness of the Indian consumers and the bitter relations with China has given a hope to the Slow Fashion to rise. Consumer's perception is changing and giving importance to Indian brands. Comfort, reliability, value for money has become sacrosanct.

1.6 CHAPTER SUMMARY

This chapter gives a small description about how fast fashion and its trend had an influence over the industry. The concept of fast fashion has resulted in supply chain exploitations and inequalities which have been brought to the fore through awareness campaigns by platforms like Fashion Revolution and debates at the annual Copenhagen Fashion Summit. Exploitation of garment workers in developing nations, the deplorable conditions of sweatshops, inequitable opportunities and earnings for female workers, child labour, absence of basic safeguards for health and worker safety, the use of toxic dyes and exotic animal skins—fashion bleeds with these concerns. In India, The rising disposable income has given rise to frequent clothing purchases. The consumers have low level of environmental concern and are more concerned with being "on trend" at lower prices. Some Fast fashion consumers supported environmental issues but practiced unsustainable apparel consumption behavior. They supported the idea of sustainability but not when it applied to fashion products; the newness and low cost of products encouraged consumption. The growing needs of consumers for cheap affordable products resulted in detrimental impact on workers, environment and the handloom sector.

- In the Industry, where low-cost labor is essential for industry competitiveness, the garment industry has been subject to various allegations of labor abuse, including long hours, forced overtime and low wages.
- The fashion industry emits a hefty amount of greenhouse gases per year, thus contributing massively and actively to global warming. The chemically polluted textile

wastewater degrades the quality of the soil and water when it mixes with these natural resources and its dependent habitats and environment.

- The Handloom sector has also been impacted as many artisans and their talent has been affected by the fast fashion trend among consumers. The increase in the cost of materials has severely impacted upon the Indian handcrafted textile industries particularly as customers are not prepared to pay more - including foreigners.

This is how the industry looked before COVID. After that, the industry and consumer behavior completely changed. In December 2019, the Corona virus broke out and it impacted the countries worldwide leading to lockdowns, sudden disruptions of business making the global economy come on standstill.

The Fashion Industry is in a financial stress due to the pandemic which has led to shut down of businesses and huge losses to big fashion houses. This has resulted in increased unemployment worldwide and in India as well. The workers have been furloughed without any wages paid and forced to go back to their homes. Also, the artisans working in the handloom sector which is considered as our cultural heritage has been in misery.

Adding to the crisis, the rising border tensions across the India-China border near the Pangong Lake, Ladakh. The ban of Chinese apps and restrictions of import of synthetic yarns from China did affect the industry but made the fashion consumers more conscious of their clothing. They are demanding comfort, durability and transparency in supply chain. Analyzing the past and the current scenario it can observed that COVID-19 serves as an opportunity for Indian sustainable brands to grow and take a step ahead.

Through research, it has been observed that most brands followed fast Fashion because consumers demanded trendy outfit at affordable prices. Some of them were concerned about the environment and supported sustainability, but not when it came to fashion products. But, now industry is changing as the consumer behavior is changing. The current pandemic and India – China relations has impacted the fast fashion industry and made the consumers more conscious of their health. And, this could be seen as an opportunity for the existing and future Slow

Fashion brands to give momentum and use it as an advantage to push sustainability forward. Hence, a research is required to make the entrepreneurs realize and understand the opportunity In Slow Fashion.

The purpose of the research paper is to analyze the impact COVID-19 on the fashion industry in India and understand the change in consumer behavior in order to provide sustainable ideas or solutions that could provide as a bright prospect for the concept of slow fashion in India.

CHAPTER 2

LITERATURE REVIEW

Consumerism is considered as a symptom of the inherently fast-paced production cycle and revolves around paradigms that are embedded in today's society (Carlotta Cataldi, 2010). As a society, consumers are obsessed with speed and fast production along with fast consumption inevitably lead to the systematic decrease of resources and increase of waste, thus stressing the capacity of the earth of regenerating itself at a natural pace (Preuit, 2016). Since, Fashion is an innate part of individual expression and it is a cultural reflection of a point in time a 'slow approach' is required to intervene as a revolutionary process in the contemporary world; in fact, it encourages taking time to ensure quality production, to give value to the product and contemplate the processes' connection with its environment (Carlotta Cataldi, 2010).

2.1 SLOW FASHION

The term "slow fashion" arose from the slow food movement that began with a group of Italian activists who were used to long meals and a regionalized cuisine as a response to the expanding fast food movement (Preuit, 2016). The birth of Slow Food was followed by the creation of other slow movements (i.e. Slow Design, Slow Production, Slow Retail etc) which share the same goal of decelerating the current rate of production, consumption and growth while increasing people's quality of life. The term "Slow Fashion" was coined in 2007 by Dr. Kate Fletcher, who compared the eco/sustainable/ethical fashion industry to the Slow Food movement, highlighting the similarity in terms of processes and production (Carlotta Cataldi, 2010). Slow fashion is about designing, producing, consuming and living better. It is not time-based but quality-based (which has some time components). Slow is not the opposite of fast – there is no dualism – but a different approach in which designers, buyers, retailers and consumers are more aware of the impacts of products on workers, communities and ecosystems. Slow fashion is about choice, information, cultural diversity and identity. Yet, critically, it is also about balance. It requires a combination of rapid imaginative change and symbolic (fashion) expression as well as durability and long-term engaging, quality products (Fletcher, Slow fashion, 2007).

But, slow fashion is a relatively new concept in the retail industry and therefore the definition is still evolving (Preuit, 2016). Slow fashion is based on different values than those of the fast fashion industry. It should be made clear that slow fashion is not the same business model but with classic designs, nor is it the same production model with longer lead times; it is an entirely different way of designing and producing (Fletcher, Slow Fashion - An invitation for systems change, 2010). Slow fashion has the potential to create a new beauty that includes abstract and emotional factors that are the foundation of consumers' choices (Preuit, 2016).

2.2 IMPORTANCE OF SLOW FASHION

But, the main characteristic of slow fashion is it is not produced in bulk (no mass production) and emphasis on skills of the craftsman who works inducing soul into their products (Brewer, 2019). Slow fashion emphasis on fair labor, along with supporting local business, eco-friendly supply chain, enhancing the quality of the community and believing in true retail price, resourcefulness with clean and efficient production to satisfy human needs (Aishwariya, 2019). Furthermore, life-quality of workers is improved as time pressure of production is reduced. Rather than workers experiencing excessive workload to counter erratic demands, the slower production may contribute to fair employment and regular working hours. Not only is time pressure removed but the slower time span also improves the quality of the product as each worker can spend more time on each individual product (F. Tinmark, 2019). Slow fashion also intends to prolong the lifespan of clothing from acquisition to discard by helping people buy less at a higher and more durable quality. Notably, 'high quality' is not only about fibers such as cotton, bamboo, silk, wool, linen, jute etc, cotton is the most widely cultivated and used of them all. Most of us think cotton clothing is cool, healthy and safe, but the story of mass produced commercial cotton is quite the opposite. This includes handlooms and sometimes even khadi. Most textiles are not entirely organic or socio-environmentally just with some form of chemical input or social injustice at certain stages of manufacturing (Aram, 2017).

2.3 ORGANIC COTTON VS SYNTHETIC COTTON

Cotton, being the most pollutant crop is considered to be an environmentally challenging crop because of its high pesticide use, further raising the issue of contaminants in water and soil. In the entire supply chain of garment/textiles (excluding the consumer-use part – washing and drying), the fibre production phase emits the most GHGs. The emission of CO2 in case of natural fibers occurs during preparation, planting, and field operations (weed control, mechanical irrigation, pest control, and fertilizers), harvesting, and yields. According to studies carried out by the Stockholm Environment Institute on behalf of the Bio Regional Development Group,25 the energy used and CO2 emitted to manufacture 1 ton of fiber is much higher for synthetic than natural fibers (cotton and hemp). But, cotton holds a higher carbon footprint as compared to organic cotton. Producing cotton fibers through organic way provides lot of advantages over conventional process such as less GHG emission, use of less energy for production, and environmental benefits.25,26 According to a study published in Innovations Agronomiques (2009), organic agriculture emits 43% lesser GHG than conventional agriculture. The research carried out by Cornell University revealed that organic farming required just 63% of energy required for conventional farming. In addition, it is found that organic farming adds 100–400 kg of carbon per hectare to the soil each year and when this stored carbon is included in the carbon footprint, it reduces the total GHG even further (Sohel Rana, 2015). In a research conducted by Regina, Khalil and Aziz found that their results lead to political interventions in support of both the organic and conventional sectors in order to support producers in adopting sustainable practices that are more environmentally friendly while improving their level of productivity. These policies must focus their actions on small farms, particularly in the organic sector, to improve their level of environmental efficiency and competitiveness, since they face the highest opportunity costs (Régina D.C. Bonou-zin, 2019). Specifically synthetic fibres such as polyester, nylon, and acrylic are well associated with the ecological dangers and biodegradability; those needed to be reduced/recycled or avoided. The use of organic cotton and fabrics is rising as one of the strongest resources to counter the adverse effects of regular cotton and cheaper synthetic alternatives. While the tag of 100% cotton is giving assurance to some, cotton farming still involves the use of pesticides. After the factory processing, the ready-to-use products in the store do not score much higher on the sustainability meter than synthetics.

2.4 IMPACT OF FAST FASHION ON THE INDUSTRY

The fashion apparel industry has significantly evolved and the changing dynamics of the fashion industry since then, such as the fading of mass production, increase in number of fashion seasons, and modified structural characteristics in the supply chain have forced retailers to desire low cost and flexibility in design, quality, delivery and speed to market. In addition to speed to market and design, marketing and capital investment have also been identified as the driving forces of competitiveness in the fashion apparel industry (Fairhurst, 2010). Today's fashion market is highly competitive and the constant need to 'refresh' product ranges means that there is an inevitable move by many retailers to extend the number of 'seasons', that is, the frequency with which the entire merchandise within a store is changed. With the emergence of small collections of merchandise, fashion retailers are encouraging consumers to visit their stores more frequently with the idea of 'Here Today, Gone Tomorrow'. This indicates a shorter life cycle and higher profit margins from the sale of fast selling merchandise, skipping the markdown process altogether (Fairhurst, 2010). India is known globally for her rich heritage of textiles and handcrafts. Consistently decreasing number of artisans due to vast availability of cheap, low-quality clothing allows fast fashion, over-consumption and premature disposal of fashion products. Therefore, production of sustainable traditional modes of fashion design in affordable price posed challenge (Jain, 2018).

2.4.1 Impact of fast fashion on the workers

The textiles sector in India contributes about 14 per cent to industrial production, four per cent to gross domestic product (GDP), and 27 per cent to the country's foreign exchange inflows. Yet, Labor is critical to the sector's current competitiveness and long-term viability. In a report published by International labour Organization (ILO), It was found that more than half of the workers think about leaving their current factory and about leaving the garment industry altogether (Caroline O'Reilly, 2015). The reason most frequently cited was poor wages. Other reasons include high production targets, poor working conditions and poor relationships between management and workers. It seems that many workers are unhappy with the intensity of work they are required to perform. Given the reported widespread prevalence of verbal abuse and threats of being sacked as a "penalty" for refusing overtime or not meeting targets, there is a strong indication of forced labor conditions, at least for a proportion of the workforce (Caroline O'Reilly, 2015).

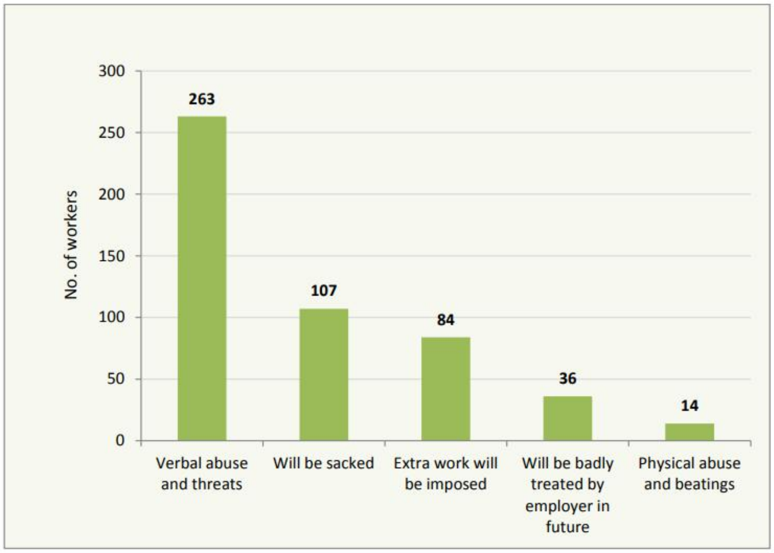

Figure: 2.1 Workers grievances against the garment factory

2.4.2 Impact of fast fashion on the artisans

Artisans are also facing a blow due to fast fashion. Changing dress preferences and competition from machine-made products has affected the incomes of the artisans. In a report, Abdul Salim, an artisan complained that fabrics have become expensive and Indian girls now wear jeans and tops, not traditional saris or salwar kameez, so there is less demand for his family's tie-dyed and bandhani fabrics. Prakash Dosi, designer and fabricator, owner of Marudur Art Impex, Jaipur discussed the challenges caused by machine produced alternatives, 'When we started it was very detailed handwork now machine embroidery is also done. Now the hand embroidery is ten times more than the machine embroidery. The foreign clients want to use machine embroidery because it is cheaper. Misri Khan also blamed the rise in cost of raw materials and the customers' demands for cheaper products for the lesser quality of his community's embroidery work (Emmet, 2014).

2.4.3 Impact of fashion industry on the environment

In India, the textile industry plays a vital role in the economic growth of the nation as well as employing skilled and unskilled workers. But due to the concept of fast fashion, it also produces a massive quantity of textile wastes that are damaging to the environment. The use of chemicals and dyes during the manufacture of textiles generates an enormous quantity of waste as sludge, fibers and chemically polluted waters (Punyasloka Pattnaik, 2018). For example, although there is a range of estimates, the industry produces 8-10% of global CO2 emissions1,2 (4-5 billion tonnes annually). The fashion industry is also a major consumer of water4 (79 trillion litres per year), responsible for 20% of industrial water pollution from textile treatment and dyeing103, contributes 35% (190,000 tonnes per year) of oceanic primary microplastic pollution and produces vast quantities of textile waste2 (>92 million tonnes per year), much of which ends up in landfill or is burnt, including unsold product. The fashion industry impacts local water supplies by producing waste water. (Kirsi Niinimäki, 2020) The industry also contributes towards excessive carbon footprint due to high energy used and impacts the climate. Also, The textile industry uses over 15,000 different chemicals during the manufacturing process, beginning during fiber production. India being one of the leading cotton producers, the heavy use of chemicals in cotton farming is causing diseases and premature death among cotton farmers, along with massive freshwater and ocean water pollution and soil degradation. Hence, this mode of manufacturing leads not only to high environmental impacts from chemical usage but increased health risks for factory workers, cotton farmers and fashion consumers (Kirsi Niinimäki, 2020).

Fashion being the world's most polluting industries: it requires enormous quantities of raw materials, creates considerable levels of pollution, leaves a significant carbon footprint, and generates alarming levels of waste. According to the World Wildlife Fund (2019), 20,000 liters of water are required to produce one kilogram of cotton. Further, the textile industry produces enormous amounts of industrial waste, with some estimates suggesting that the industry contributes 17–20% of global industrial water pollution.

2.5 COVID IMPACT

2.5.1 COVID-19 - pandemic

COVID’19, a pandemic, is the infectious disease caused by the most recently discovered corona virus. This new virus and disease were unknown before the outbreak began in Wuhan, China, in December 2019. COVID-19 is now a pandemic affecting many countries globally (Organization, 2020). The COVID-19 outbreak (previously 2019-nCoV) was caused by the SARS-CoV-2 virus. This outbreak was triggered in December 2019 in Wuhan city in Hubei province of China.

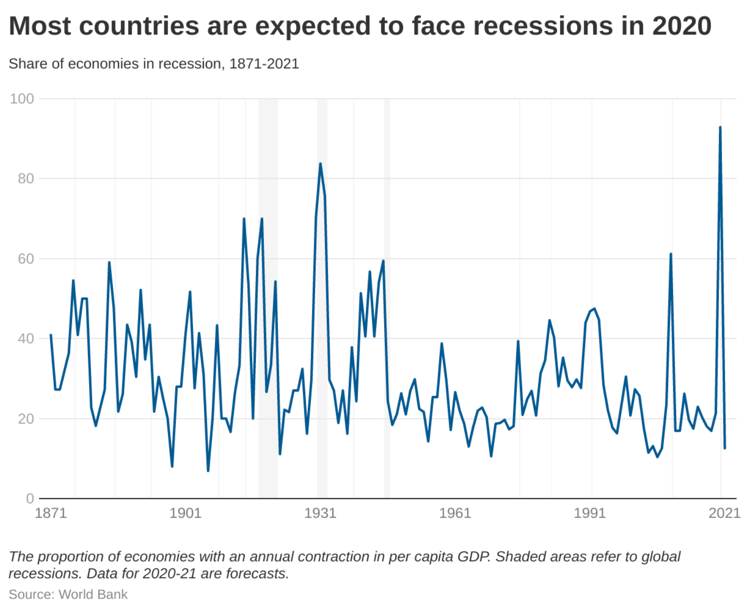

Figure: 2.2 Worl Bank prediction of worldwide recession in 2020

COVID19 continued to spread across the world. Initially the epicenter of the outbreak was China with reported cases either in China or being travelers from China (Warwick McKibbin, 2020). The pandemic has spread with alarming speed, infecting millions and bringing the global economy at a standstill due to tight restrictions on movement on movement of goods and people. Initially, the perception was that the COVID-19 pandemic would be localized in China only. It later spread across the world through the movement of people.

2.5.2 COVID-19 hit on the global economy and the Fashion Industry

The economic pain became severe as people were asked to stay at home, and the severity was felt in various sectors of the economy. The June 2020 Global Economic Prospects baseline forecasted a 5.2 percent contraction in global GDP in 2020, using market exchange rate weights—the deepest global recession in decades, despite the extraordinary efforts of governments to counter the downturn with fiscal and monetary policy support. Underutilization of capacity takes place due to factory closures (workers stay home, leaving capital and natural resources idle) as well as social distancing forcing workers to stay at home. Due to higher rates of contagion, immediate unemployment consequences of COVID-related business closures and negative demand shock, we conservatively assume the underutilization of the labor force to be 3% on average over the whole year across all sectors of the economy (The Global Economic Outlook During the COVID-19 Pandemic: A Changed World, 2020).

According to the International Monetary Fund (IMF), “the global economy is expected to shrink by over 3 per cent in 2020 – the steepest slowdown since the Great Depression of the 1930s.”

According to the International Monetary Fund, 2020 is likely to be the worst year for the global economy since the Great Depression. The initial outbreak in China created delays, closures, and disruption in manufacturing facilities and supply chains within fashion (Catharina Martinez-Pardo, 2020). As clothing outlets have been shut by lockdowns in developed market economies, sinking demand for apparel, brands and retailers have moved quickly to cancel or postpone production orders – refusing, in many cases, to pay for clothing their supplier factories have already produced. The result has been the partial or complete shutdown of thousands of factories in producing countries. As a result, millions of factory workers have been sent home, often without legally-mandated pay or severance (Anner, 2020). And, this has resulted in ‘Fashion’s Darwinian Shakeout’. According to McKinsey analysis, 34 percent of listed fashion businesses in North America and Europe were displaying signs of financial distress before the corona virus first broke out. Even before the outbreak began, more than half of the fashion companies in the McKinsey Global Fashion Index (MGFI) were classified as “value destroyers” in The State of Fashion 2020 report — meaning their profit does not exceed their estimated cost of capital and that number has been growing each year. The term fashion’s Darwinian Shakeout states “the crisis will shake out the weak, embolden the strong and accelerate the decline of those that were already struggling before the pandemic, compelling companies to evaluate divestment and acquisition opportunities and capture whitespaces that emerge from the reshuffle (Mckinsey, 2020).

After travel and tourism, fashion and luxury together are the most negatively impacted of all consumer goods and services, as retail stores shutter and consumer purchasing shifts to necessities. From April to May, sales decreased by 60-70% in the worldwide fashion and luxury industry – with footfall in retail and recreation stores down by 44% in the U.S., 52% in Germany, 78% in India, and 59% in Brazil (Catharina Martinez-Pardo, 2020).

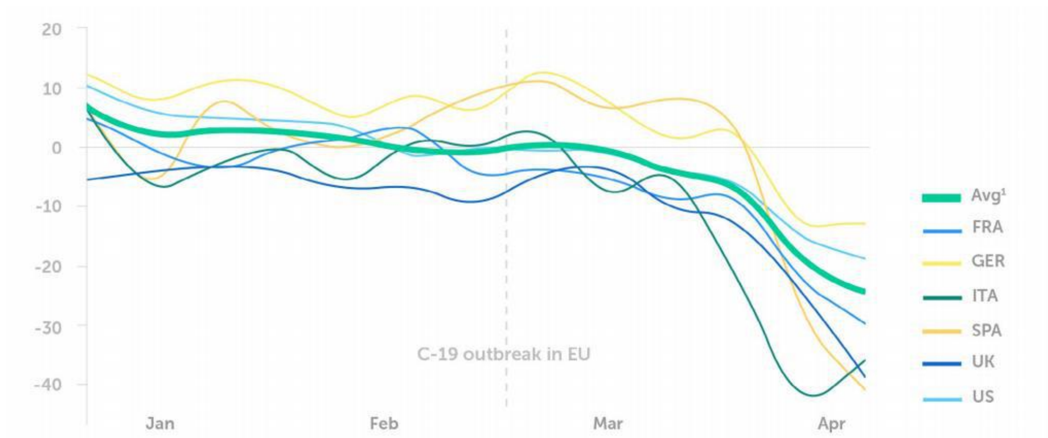

Figure: 2.3 Average downfalls of Fashion apparel industry, luxury, cosmetics and beauty industry

2.5.2.1 COVID impact on the workers

Since the coronavirus pandemic took hold, more than half of Bangladesh suppliers have had the bulk of their in-process, or already completed, production canceled. When orders were canceled, 72.1% of buyers refused to pay for raw materials (fabric, etc.) already purchased by the supplier, and 91.3% of buyers refused to pay for the cut-make-trim cost (production cost) of the supplier. More than one million garment workers in Bangladesh already have been fired or furloughed (temporarily suspended from work) as a result of order cancellations and the failure of buyers to pay for these cancellations(Anner, 2020).

2.5.2.2 COVID impact on the global consumers

On the other hand, Consumers now want to own less, buy locally, heal bruised ecologies, demand transparency. They have become extremely cautious in their spending and what they wear. Consumers are now looking for comfort, value – based, long lasting apparel. Due to the current crisis, conscious consumerism has taken place.

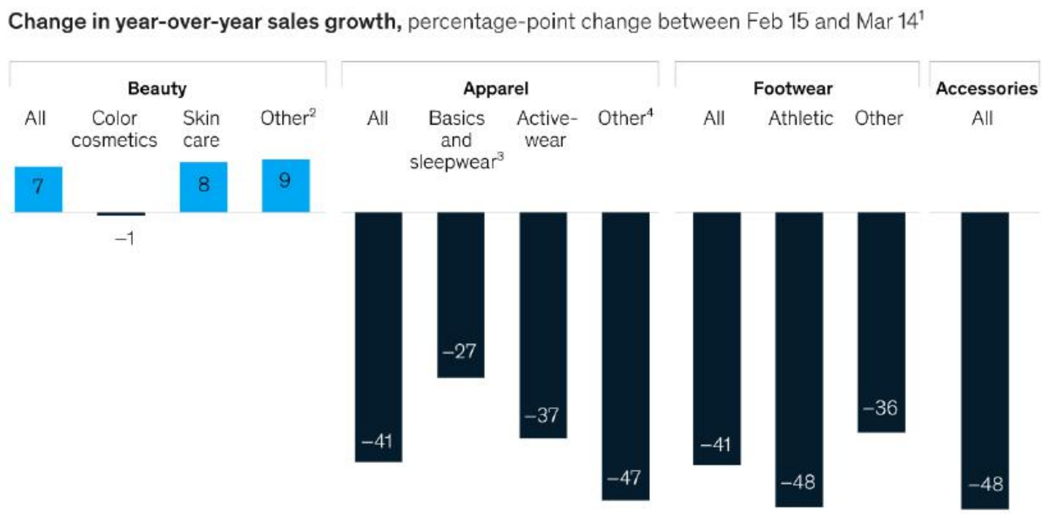

Figure: 2.4 Sales data from Amazon reflect changes in buying behavior of the consumers

Sales data from Amazon show that growth in apparel sales fell by an average of 40 percentage points between mid-February and mid-March. "Indoor" fashion categories, such as pajamas and activewear, fared a little better—but they are highly fragmented and lower margin, with limited differentiation across brands. In a March 20–22 survey of US consumers, 63 percent of respondents said that they expect to spend less on apparel than they usually do. If the shape of the recovery in North America mirrors that of China, it could be midsummer before spending and shopping behaviors begin to return to "normal." (Colleen Baum, 2020)

2.5.3 COVID Impact on the Indian Fashion Industry

As business all over the world is getting impacted by the coronavirus outbreak, the Indian fashion industry has also taken a hard hit. From fashion weeks getting cancelled to stores being shut for months, the industry is now looking at ways to adapt to the current scenario (India, 2020). The Indian fashion and textile industry provide livelihood to many people—weavers, dyers, tailors, designers, exporters, raw material producers. And the pandemic has disrupted the entire chain. Due to the pandemic, the fashion industry has come to a screeching halt, much like the other luxury-related industries. In these times, anything that is not an essential item has been disregarded due to the dire nature of the circumstance. This, in turn, has affected the lives of many migrants and lower social economic background workers who have found themselves suddenly out of work (Thacker, 2020).

2.5.3.1 Impact on Indian Handloom Industry

Handloom textiles and crafts hold a special place in India's cultural heritage; weaving being a source of livelihood for millions of families. Nowhere in the world can so many diverse weaving techniques be found together in one country. The crisis caused by COVID-19 has resulted in a sudden disruption of businesses across the globe and the handloom sector has, too, been severely affected with their traditional and contemporary markets for artisans being totally closed. Raw material producers, weavers, dyers, designers and tailors in India's textile industry — worth approximately $150 billion according to India Brand Equity Foundation's 2019 estimates — are especially vulnerable. In fact, craftspeople may be the most susceptible. Small, mainly self-employed, and dependent on seasonal retail sales and direct orders, [craftspeople] have received huge blows in successive years first with demonetization, then GST (Times, 2020). Gita Ram, Chairperson, Crafts Council of India said "Business of the craft communities has been impacted as sales opportunities have been postponed, if not cancelled. They had built up stock, through bank loans and other channels. And we know payback guidelines of these agencies are stringent. We are trying to stock few of these consignments in stores but given the current circumstances, stores will have minimal footfall or close down." (Khubchandani, 2020).

2.5.3.2 Impact on the Industry due to India- China political stand-off

In June 2020, the ban of Chinese apps was ordered in the backdrop of the stand-off situation with Chinese troops along the Line of Actual Control in Ladakh. The Information Technology Ministry of India invoked its power under section 69A of the IT Act and rules, and made the decision to ban Chinese mobile apps available on Android and iOS platforms in order to safeguard the sovereignty, integrity, defense of India, and the security of the state and public order. This decision is a targeted move to ensure safety and sovereignty of Indian cyberspace. Shein and Club Factory are two major affordable Chinese fashion culture brands, and the Indian consumers were willingly purchasing them through e-commerce platforms.The major reasons for their immense popularity were the stylish, trendy apparels at affordable prices. They were so affordable that

- Among Club factory‘s 70 million application users worldwide, about 40 million came from India since its launch.
- Shein, another fashion e-commerce platform China, is most celebrated in the Indian market, catering to more than 1 million active users per day.

As a result of the ban of Shein, Club Factory, and ROMWE resulted in an unexpected side effect — it's hitting many of India's best known fashion bloggers. But, the ban has paved the way for new opportunities for the homegrown and sustainable brands.

The Confederation Of All India Traders (CAIT) has initiated a new campaign, ‘Indian Goods – Our Pride’. The idea is to embrace and enhance the propaganda to boycott Chinese products and, of course, make them in India. CAIT came up with a detailed list of 500 broad categories and 3,000 products including fabrics and cosmetics that can easily be made in India by the countrymen. The country is moving forward with an aim that by December 2021, imports of Chinese products worth $13 billion to be substituted by local ones.

The virus along with India- China stand-off affected the textile industry as well. Many Garment factories in China stopped working due to covid-19, adversely affecting export of fabric, yarn, other material from India. Due to this disruption it slowed down the cotton yarn export by 50 per cent, which impacted on spinning mills in India. Lockdown affected the running of services and products hence textile industry is affected and adversely affected in interest to the financial institutions. A big disadvantage of India against other Asian countries like Pakistan, Bangladesh and Indonesia is is that duty free access to China export of cotton yarn. On other side, the crisis continues in China will affect all industries where China is a major exporter.

2.5.4 Change in Indian consumer behavior

The 1918 flu epidemic transformed personal hygiene and cleanliness habits, increasing the frequency of clothes washing and use of electric washers.22 Women's domestic employment during World War II changed the nature of female workforce participation even after the war.23 And health events such the 2003 SARS outbreak drove lasting changes in retail consumption patterns, given that much of the population hesitated to venture outdoors and instead shifted to online shopping.24 Accordingly, the recovery from COVID-19 will hasten previously emerging trends across industries – from the prevalence of remote work, to adoption of e-commerce and home delivery services, to the importance of purpose and values in major brands. And specifically for apparel, footwear, and textile, all trends point to sustainability solidifying as a basic expectation across the industry. Early signals suggest that a global health crisis will increase overall consumer demand for products closely associated with trust, well-being, and the collective good – particularly in categories such as food and nutrition, but also in beauty and fashion, which are considered 'close to the body.' As consumers spend less money but more consciously, the expectation for sustainability, fair working conditions, and ethical action within supply chains will become absolute table stakes. Already consumers across different countries are raising their expectations of apparel brands during the pandemic, and responding positively when brands demonstrate social responsibility, give back to communities in need, and prioritize environmental sustainability.

After the pandemic, factors such as quality and durability will become more important, given expected economic uncertainty and high levels of unemployment among consumers. Despite the struggles of the moment, macro-trends demand significant action for sustainability within the industry. After COVID-19, fashion leaders will reshape what it means to be a sustainable business, with a unified approach that integrates environmental, social, and purchasing considerations into core business practices, with the development of sustainable products as an area of innovation. And expectations for the entire industry will be reset around greater collaboration, more equitable partnerships, and collective responsibility across all parts of the value chain.

2.6 CHAPTER SUMMARY

This chapter is the literature review of the past studies regarding the fashion industry before and after COVID. At first, the concept of slow fashion is explained with references to different studies by different authors. The importance of slow fashion is also discussed in details and explains the need of slow fashion, the benefits of slow fashion for the artisans, workers, consumers and the environment as well. In order to emphasize on the benefits of the slow fashion, a comparison has been made between organic cotton and synthetic cotton. After the discussion on the slow fashion which is the requirement, the chapter describes about the impact of fast fashion on the industry in general and on the workers, artisans and on the environment in particular.

The chapter then explains COVID-19 and it's impact on the global economy and fashion Industry. This is followed by the impact on the Indian fashion industry due to COVID and India-China political stand-off. Impact on the Indian handloom industry, on the workers and consumers are studied in depth. It also explains the change in consumer behavior due to COVId and the rise in conscious consumerism among Indian consumers.

CHAPTER 3

METHODOLOGY

The purpose of the research paper is to analyze the impact COVID-19 on the fashion industry in India and understand the change in consumer behavior in order to provide sustainable ideas or solutions that could provide as a bright prospect for the concept of slow fashion in India. So, on the basis of the literature review, the questions arose for the paper is:

a. In India, how COVID'19 has opened windows for the new era of responsibility in Fashion?
b. To what extent COVID-19 has impacted the purchasing behavior of fashion consumers in India?

3.1 RESEARCH DESIGN

In order to study the change in consumer behavior, a survey has been done for the collection of the data from both males and females regarding their purchasing pattern before COVID, their perception about Slow Fashion before and after COVID and the different changes in their buying pattern due to COVID. The test has been done to understand the about the consumer perception on purchasing apparel and their interest towards sustainable choices. The results of such analysis may be further used to improve the knowledge about the consumer behavior pattern which has changed due to COVID-19.

The main purpose of the survey is to produce information, that is, quantitative descriptions about some characteristics of the study. The procedure for the collection of such information is by asking questions related to the specific problem and through this, their answers and views were analyzed.

3.2 POPULATION AND SAMPLE DESIGN

3.2.1 Target Group of the population

1. Geographic	
Country	India
City	Kolkata
2. Demographics	
Age	24 years – 30 years 31 years – 35 years 35 years – 40 years
Gender	Both male and female

Table 3.1: Geographic and Demographics

3. Psychographics	
Purchased frequently (Before COVID)	Somewhere appreciates artwork of handloom
a fast fashion buyer (Before COVID)	Comfort is now sacrosanct
Not very environmental conscious (before COVID)	Understanding the importance of sustainability
Fashion conscious	are more health conscious
Follows trend	Valuing money
Interested in learning about product details	

Table 3.2: Psychographics

3.2.2 Simple Random Sampling

There is a simple random sampling done on the survey who are randomly selected where a subset of individuals were chosen from the population. This is an unbiased surveying technique, so there is a same probability of each individual to be chosen. The suitable sample size of 52 men and women participants is adapted.

3.3 DATA COLLECTION METHODS

The key technique for attaining data from the study is the questionnaire. In the survey design, decent questions would be reliable providing valid answers what was actually intended to measure.

3.3.1 Contents of the Questionnaire

Since the survey has simple random sampling, the contents of the questionnaire has been carefully examined and designed in order to get the precise answers.

a. Title of the questionnaire: Since the data of the survey is mainly focused on analyzing change in consumer behavior due to COVID-19, therefore this questionnaire is called “COVID-19 Impact on Consumers”.
b. Introduction: A brief outline of the questionnaire has been given to the participants. The introduction includes the purpose of the questionnaire, the content and the outline of the question which is required to answer the questionnaire.
c. Demographic questions: First is about name, age, gender and occupation.
d. First Part - Pre COVID-19: The questionnaire was divided into two sections in order to understand the consumer behavior before and after COVID. So, the first part included questions related to their purchasing pattern and knowledge about slow and fast fashion.\
e. Second Part – COVID-19 Impact: This section included questions related to their change in behavior and growing interest towards sustainability.
f. Greet the participants: In the final part, thanks were given to the participants for filling out the questionnaire. The language of the questionnaire for the participants in Kolkata was English..

The form was distributed using google forms and was circulated through social media platforms – LinkedIn, Instagram, Whatsapp and Facebook.

3.4 CHAPTER SUMMARY

This chapter would give an overview of the survey which is conducted on the research questions based on the change in their purchasing pattern before COVID, their perception about Slow Fashion before and after COVID and the different changes in their buying pattern due to COVID. The test has been done to understand the about the consumer perception on purchasing apparel and their interest towards sustainable choices. The outcomes of the survey could be further analyzed for making the Indian brands aware of the growing consciousness among consumers.

The main sample frame is both male and female participants who are from Kolkata. A simple random sampling is done where the participants are randomly selected which is an unbiased surveying technique. The fundamental technique for getting data in the study is the questionnaire. The main content of the questionnaire is title, introduction, demographic questions, Pre COVID and COVID impact on consumer behavior and at last greeting to the participants. There is only an English version of the questionnaire which was distributed.

CHAPTER 4

DATA ANALYSIS AND FINDINGS

AGE

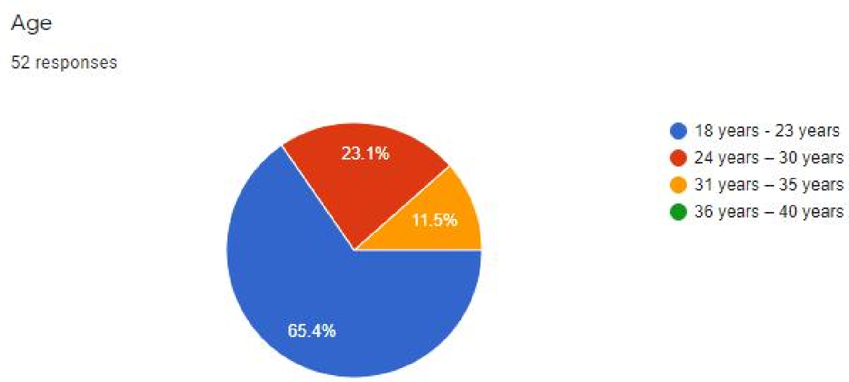

Figure 4.1: Age of Respondents

Out of 52 respondents, 34 of them lie between the age of 18 years to 23 years. 12 of them lie between the age of 24 years to 30 years and the rest 6 lie between the age 31 years to 35 years. And, no respondent's age lied between 36 years to 40 years.

GENDER

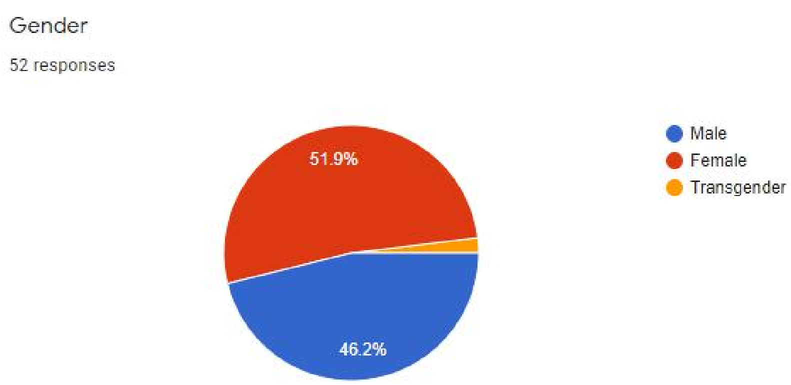

Figure 4.2 Genders of Respondents

The survey that was carried out was responded by 27 females (51.9%), 24 male (46.2%) and 1 is a transgender. This shows that proportion of women and men are almost equal.

OCCUPATION

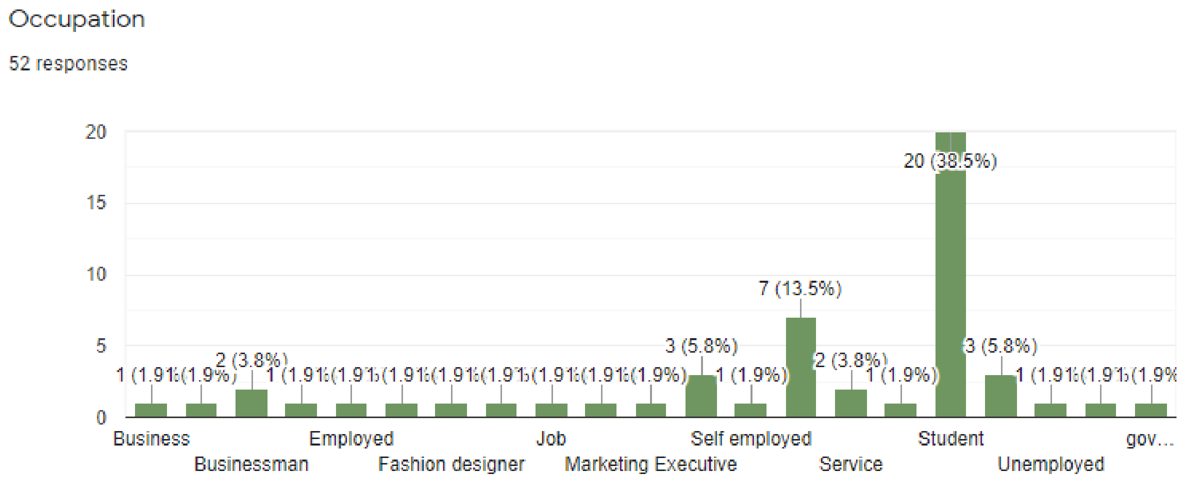

Figure 4.3: Occupation of the respondents

From the above bar graph, it can be observed that out of 52 respondents 20 of them are students. 7 of them mentioned that they are in service and other respondents include businessman, fashion designer, Marketing Executive, Government employee and one of them is unemployed.

PRE COVID

1. **Were you a frequent buyer before COVID?**

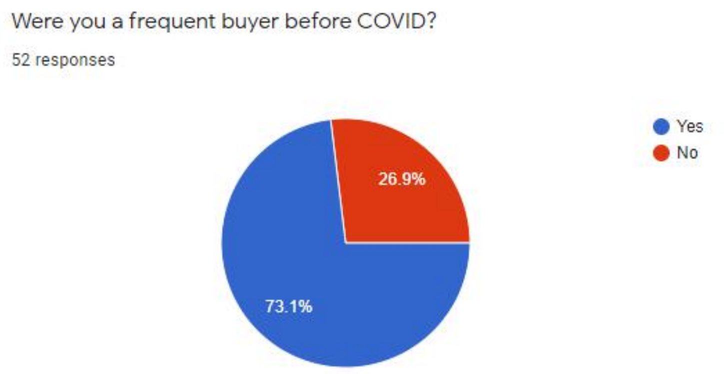

Figure 4.4: Percentage of frequent buyers before COVID

The data collected implies that 38 out of 52 respondents, that is, 73.1% of the responses received agreed that they were a frequent buyer before COVID-19. Only, 26.9% of the respondents disagreed to the question. This shows that maximum of the consumers were a frequent fashion buyer before COVID-19.

2. **How frequently you purchased?**

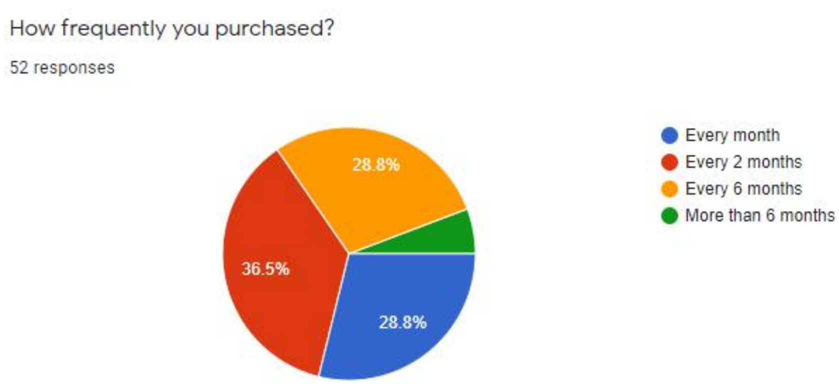

Figure 4.5: Percentage of number of times purchased in a year

The responses received that 36.5% of the respondents, that is, 19 out of 51 respondents purchased apparel every month and 15 respondents (28.8%) purchased apparel in every 2 months and every 6 months respectively. Only 3 out 52 respondents selected the option "More than 6 months". This implies majority of the respondents purchased quite frequently even if not required.

3. **Were you a sustainable buyer(who buys products with improved sustainability footprints that also meet price, performance and quality requirements) or a fast fashion buyer(who buys inexpensive designs that are fashion trends and are cheaply available) ?**

Figure 4.6: Percentage of respondents being sustainable or fast fashion buyer

The data reveals that 63.5% of the responses received, that is, 33 respondents believe that they were a sustainable buyer and the rest 19 respondents agreed that they were fast fashion buyers and purchased apparel frequently at lower costs. This implies that most of respondents are not clear with the concept of sustainability as they are contradicting their own answers and consider themselves as sustainable buyers.

4. **If you were a fast fashion buyer, how likely were you aware of the ill effects of fast fashion on the environment, workers and consumers?**

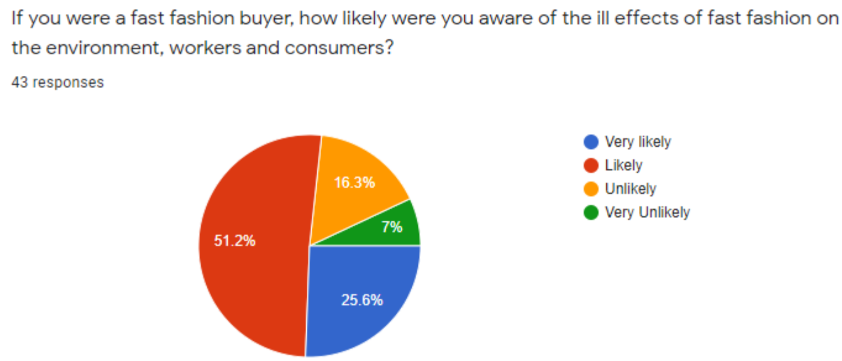

Figure 4.7: Percentage of respondents aware of the ill effects of fast fashion

The data collected implies that majority of the respondents were aware of the ill effects caused by fast fashion. In total of 33 respondents (combining the responses for the options 'likely' and 'very likely') are aware of the ill effects of fast fashion but still chose to purchase fast fashion items. Only 3 of them were not aware of the impact at all and the rest 7 were somewhat not completely aware of the impacts of fast fashion.

5. **On a scale from 0-10, how much would you rate yourself in terms of buying the product while thinking about the impact on the environment?**

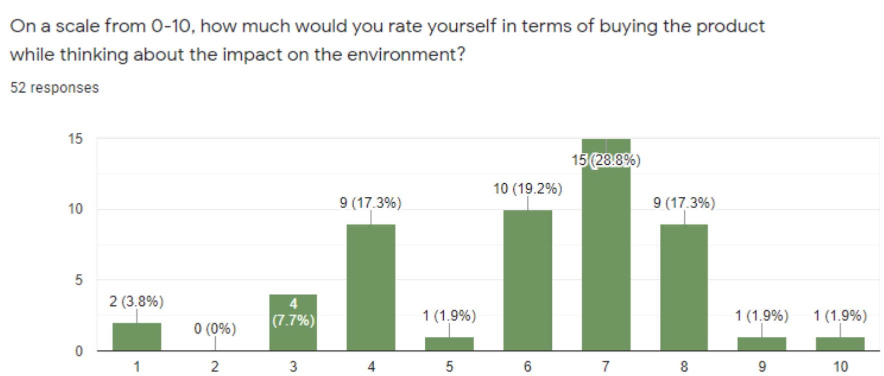

Figure 4.8: Percentage of ratings given by the respondents regarding impact of environment

The data reveals that 15 out of 52 respondents rated themselves “7” in terms of thinking about the environment while purchasing. 10 respondents rated themselves “6” and 9 of them rated “4” and “8” respectively. And only 1 respondent rated herself/himself “10”. This shows that maximum respondents did think about the impacts of fast fashion environment while buying for themselves.

6. Did you hear about the concept of Slow Fashion before COVID?

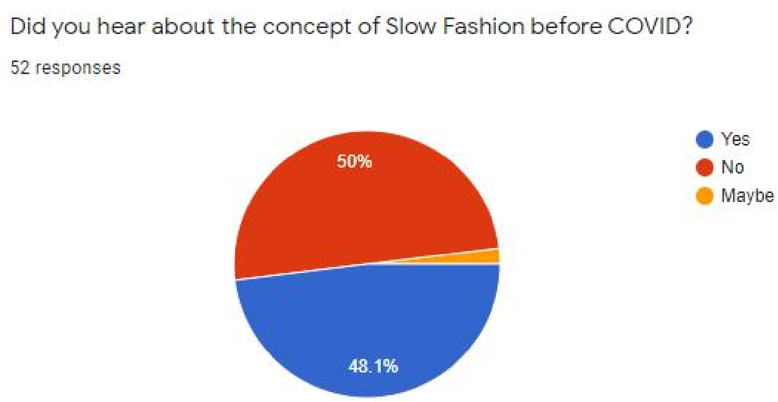

Figure 4.9: Percentage on the awareness regarding Slow Fashion

The data collected revealed that 50% of the respondents were not aware of the concept of “Slow Fashion”. But, almost the other half of the respondents were well aware of the concept and only 1 respondent was not sure. This implies that half of the consumers were unaware of sustainability related terms like “Slow fashion”.

7. If yes, what perception did you hold about "Slow Fashion" ? (choose any 2)

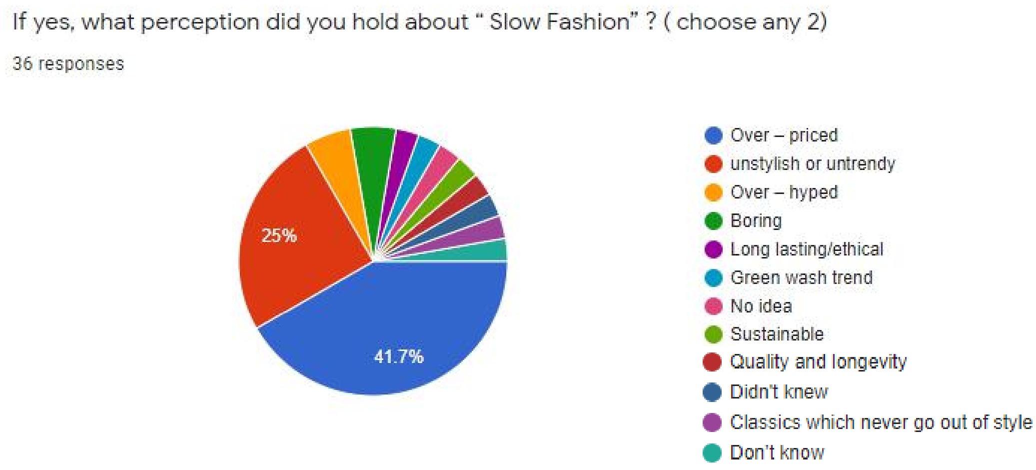

Figure 4.10: Different perceptions on Slow Fashion

From the data collected, it has been observed that majority of the respondents, that is, 41.7% of the respondents (15 out of 36 responses) considered Slow Fashion as over-priced. 9 of the respondents perceived Slow Fashion as unstylish and untrendy. 2 respondents considered it has over-hyped or boring respectively. Only 1 respondent considered Slow Fashion as "Classics".

COVID-19 IMPACT

8. Has COVID made you a conscious consumer?

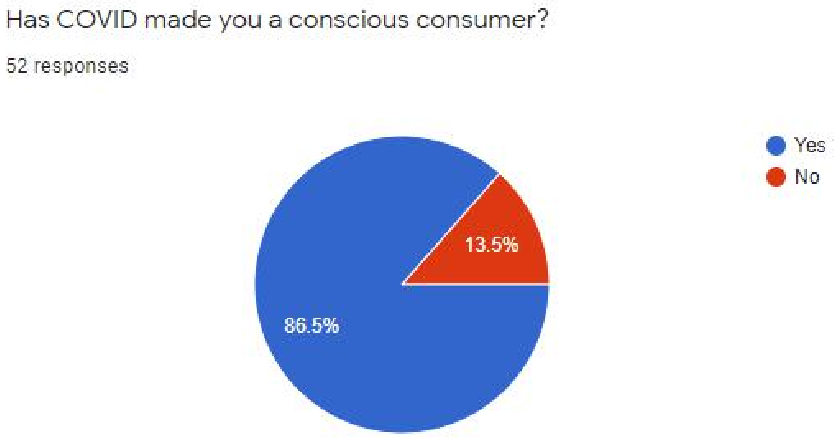

Figure 4.11: Percentage of the respondents who have become conscious consumers

From the results collected, 45 out of 52 respondents agreed that they have become conscious consumer. Only 7 out of them feel that COVID has not impacted their buying habits and are continuing to buy clothes at the same pace.

9. If yes, in what ways has it made you a conscious consumer?

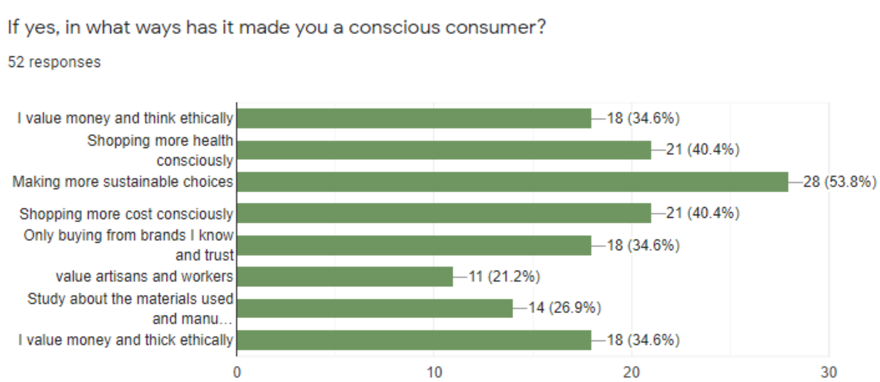

Figure 4.12: Ways in which the respondents have become conscious consumers

The data collected reveals that 28 out of 52 respondents have started making sustainable choices due to COVID-19. 21 respondents have started to shop more health consciously and cost consciously. 18 out of 52 respondents have started valuing money, think ethically and buy from trusted brands. 14 of them study about the amterials before buying and 11 of them have started valuing workers and artisans. Overall, there has been a positive impact of COVID-19 on consumers.

10. To what extent do you agree or disagree with the following statements:

a. I would like fashion brands to tell me about where the materials used in their products come from.

b. I am interested in learning about what, if anything, fashion brands do to minimize their impact on the environment.

c. I am interested in learning about what fashion brands do to protect their workers' human rights.

d. I am interested in learning about what fashion brands do to improve the lives of people in the societies where they manufacture their products.

e. I would like to know how my clothes were manufactured.

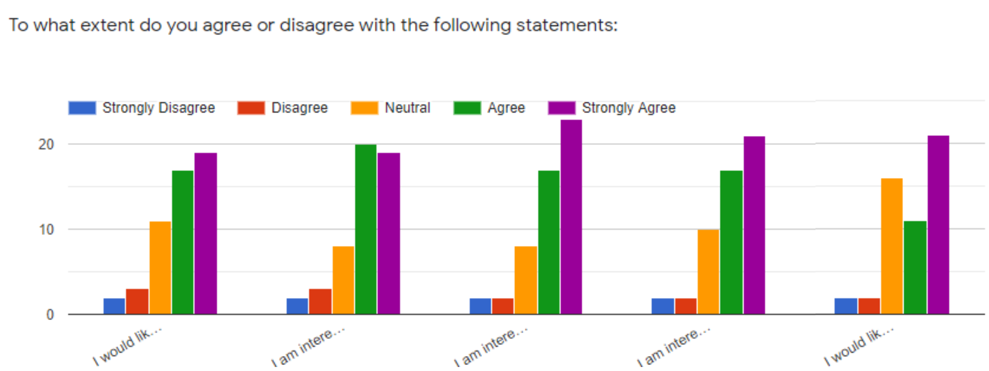

Figure 4.13: bar graph on different statements regarding conscious consumerism

Out of 52 respondents, 36 respondents ("including 'agreed' and "strongly agreed") have agreed with the first statement. 39 respondents (including 'agreed' and "strongly agreed") have agreed to the second statement. 40 respondents (including 'agreed' and "strongly agreed") have agreed to the third statement. 38 respondents (including ‘agreed’ and “strongly agreed”) have agreed to the fourth statement. 32 respondents (including ‘agreed’ and “strongly agreed”)) have agreed to the fifth statement. This concludes that majority of the respondents are interested in knowing about the materials used, in learning how the brands minimize their impact on environment, in learning how workers and artisans are being protected and in what brands do for the society.

11. Due to COVID, how has your purchasing behavior affected? (Select all that apply)

a. You started buying more of comfortable clothes (tees, pyjamas, shorts)

b. You started investing less on apparel and more on essential items.

c. You have started styling old apparels in different ways

d. You have shifted to sustainable brands for quality and durability

e. You have started buying more and more clothes due to COVID discount offers

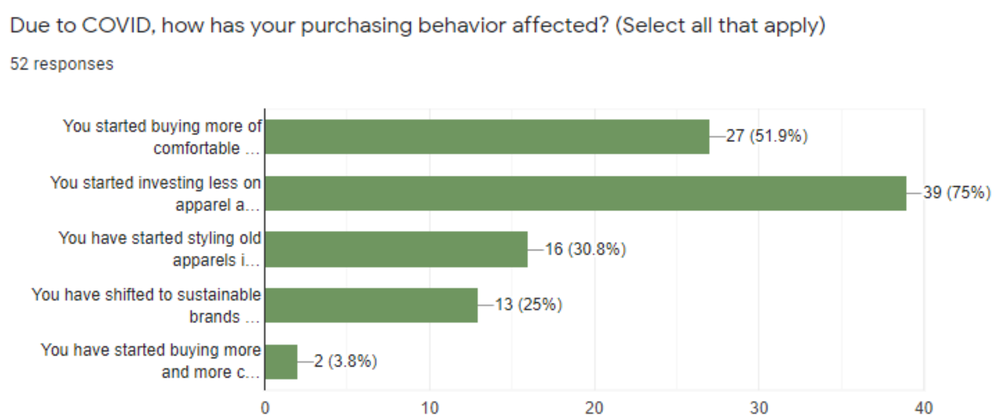

Figure 4.14: Bar graph on change in purchasing behavior due to COVID

From the data collected, it can be observed is that 39 out of 52 respondents have started spending less on apparel and more on essential items. 27 of the respondents have started buying more comfortable clothes as comfort has become sacrosanct for the respondents. 16 respondents style old outfits in various ways to look stylish and save money and 13 of them have shifted to sustainable brands. Only 2 respondents purchased more clothes due to discount offers available due to COVID. This shows a positive sign towards sustainability.

12. As artisans are worse hit by the pandemic, do you agree consumers would be willing to buy from slow fashion brands to support Indian designers and local artisans?

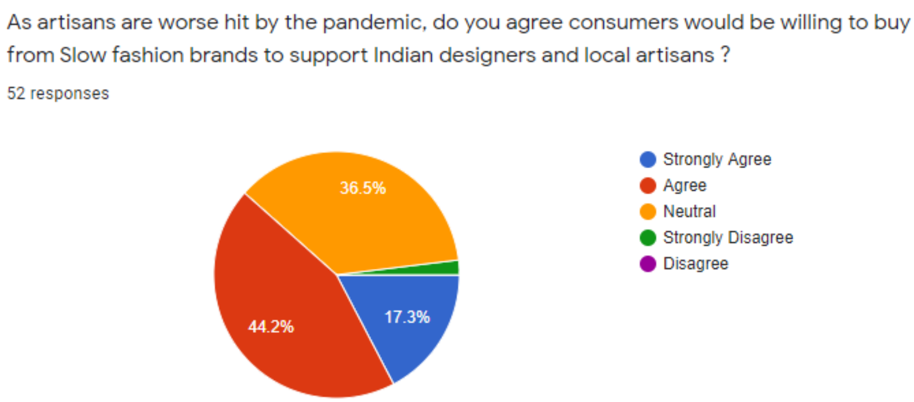

Figure 4.15: Percentage of consumers who support Indian designers and artisans

The data collected shows that 9 out of 52 respondents "strongly agree" and 23 respondents "agree" that consumers are willing to buy from slow fashion brands to support Indian brands and artisans. Whereas, 19 of the respondents neither agree nor disagree meaning that they are not sure about the consumer behavior. Only 1 respondent strongly disagree with the given statement.

13. If given a choice between handloom apparel and branded apparel, which one will you prefer more?

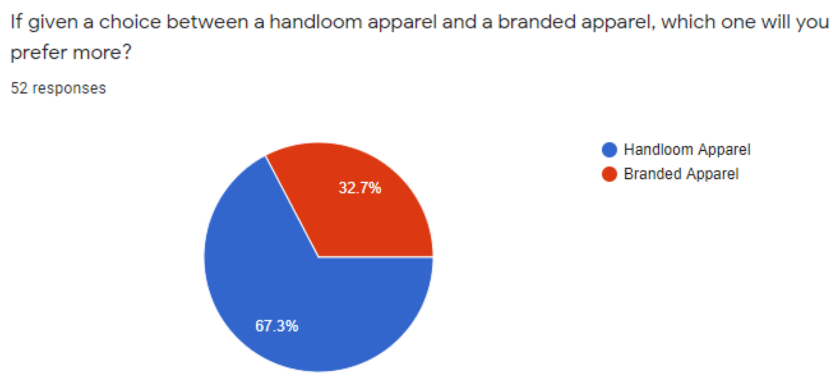

Figure 4.16: Consumer choice between handlooms and brands

The data collected shows that 67.3% of the respondents, that is, 35 out of 52 respondents chose handloom apparel over branded apparel. And the remaining chose branded apparel. This shows the growing inclination of the respondents towards the handloom apparels.

14. Slow Fashion is the future of the Industry.

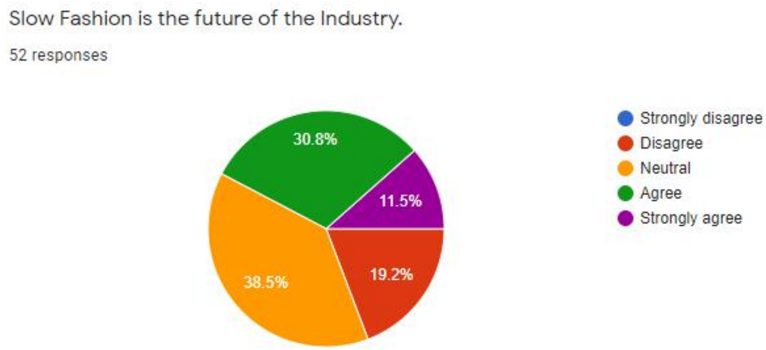

Figure 4.17: Percentage of respondents who believe Slow fashion is the future

Out of 52 respondents, 6 of them "strongly agree" and 16 "agree" to the above statement. 20 respondents neither agree or disagree and are not sure about the future industry. 10 of them disagreed with the above statement.

15. Do you believe that Post COVID consumers would be equally health and environment conscious as they are now?

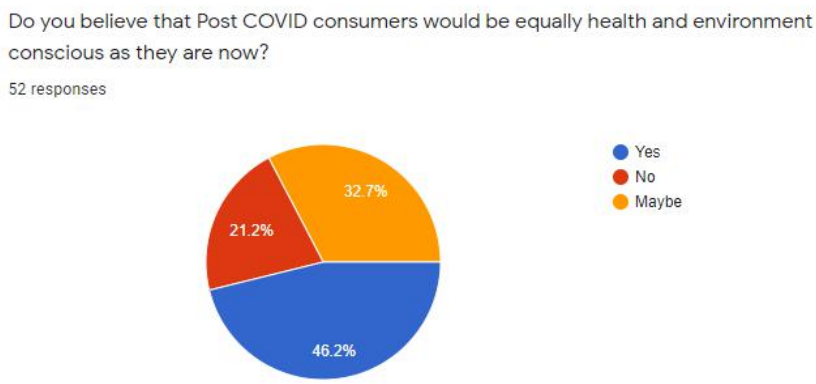

Figure 4.18: Respondents belief's regarding the future industry

Out of 52 respondents, 24 of them agreed that consumers would be equally health and environment conscious post COVID-19. 17 respondents are not sure about the post COVID consumer behavior towards the environment and health. 11 of the respondents disagreed and believe that consumers will go back to the same buying pattern just as it was before COVID-19.

4.1 CHAPTER SUMMARY

A random sample survey was done using a questionnaire among the males, females and transgender in Kolkata. The questionnaire was prepared in the Google forms with a target of achieving 50-00 respondents. The Google form was circulated through different social media platforms. The total number of responses received is 52.

The questionnaire was divided into 2 parts – a. Pre COVID and COVID Impact to record answers. The data collected revealed that 73.1% of the respondents were frequent buyers before COVID and 36.5% of them purchased apparel every month. Also, it was observed that majority of the respondents were aware of ill effects of fast fashion on environment, workers and consumers. But, 50% of the respondents were unaware of the concept of Slow fashion before the pandemic and the rest who knew, majority of them considered it to be over-priced.

But the pandemic has made majority of the respondents conscious consumers as 86.5% of respondents have become conscious buyers and majority of them think ethically and value maoney. Majority of them are interested in knowing about the materials used in the products, safety protocols for the workers and the impact on the environment. Also, majority of them now look for comfortable clothes and have chosen handloom apparel over branded apparel. Also, 30.8% and 11.5% “agree” and “strongly agree” respectively that the Slow fashion is the future of the Industry while majority of the respondents were still unsure.

CHAPTER 5

DISCUSSIONS, CONCLUSION AND RECOMMENDATION

This chapter is to discuss the outcome of the research paper in comparison of the past studies mentioned in the literature review. There are various recommendations that can be used followed by the conclusion which is obtained by the survey done in Kolkata.

5.1 SCOPE AND LIMITATION OF THE STUDY

5.1.1 Scope of the study

a. The scope of the study is to identify the change in consumer behavior due to COVID-19. The research paper also covers the pre COVID scenario in India and the fashion consumer behavior before COVID. Overall, it consists of various parameters which have occurred due to COVID-19 that have paved way for the growth of Slow Fashion in India.
b. The study has been done to understand the change in Indian consumer behavior pattern and highlight upon the need to save the environment and protect the workers and artisans to boost the Indian economy.
c. The scope is to learn about the current economy and the industry along with the change in consumer behavior to identify an appropriate way to move the Indian fashion Industry towards Slow Fashion.

5.1.2 Limitation of the Study

There were many difficulties have been faced while carrying out the study for this research paper. Some of the limitations are as follows:

a. Due to COVID -19, the survey could be only done through google forms and through social media. Physical surveys could not be conducted.
b. The fashion industry is huge and due to this the impact of COVID-19 on every segment of the industry could not be studied.

c. Another limitatio0n of the research paper is the time restraints which restricted me from going into a more detailed research about the industry and the COVID-19 impacts.

5.2 INTRODUCTION

This particular chapter would have a framework of the combination of various aspects such as the summary of the purpose, main objectives and the methodology used in the study on the change in consumer behavior towards Slow fashion where the main gap area found was the need to make the entrepreneurs (to be or existing) realize the importance of the concept and take up slow fashion as the consumers attitude is changing towards slow fashion and this could be an opportunity for the brands.

The major findings would be discussed in comparison of the previous studies which has been done and is mentioned in the literature review chapter. The major design outcomes would be discussed along with the various recommendations which can be done for improvement or for further studies. For all these a summary of the overall research is required to analyze the improvements or recommendations which can be used in further studies.

5.3 SUMMARY

5.3.1 Objectives of the Study

Through research, it is been observed that, in India, before the pandemic, most of the brands followed the model of Fast Fashion in their businesses because consumers were completely driven by the affordability and trend that the Fast fashion provided. Consumers supported the idea of sustainability, but not when applied to fashion products. Due to this, sustainability & slow fashion concepts had taken a backseat.

But, the current pandemic and India – China relations has impacted the fast fashion industry and made the consumers more conscious of their health. And, this could be seen as an opportunity for the existing and future Slow Fashion brands to give momentum and use it as an advantage to push sustainability forward.

Hence, there is a need to design a research paper that addresses the problem and make the entrepreneurs(to be or existing) realize the importance of the concept and take up slow fashion or incorporate sustainable measures in their businesses.

The purpose of the research paper is to analyze the impact COVID-19 on the fashion industry in India and understand the change in consumer behavior in order to provide sustainable ideas or solutions that could provide as a bright prospect for the concept of slow fashion in India.

5.3.2 Methodology

A simple random sampling survey has been done for the collection of the current data to understand the change in consumer behavior pattern before COVID and after COVID. Through the survey their change in purchase pattern, change in attitude and perception towards slow fashion was studied. The sample frame is male, female and transgender from Kolkata, West Bengal.

The participants were given instructions regarding the survey. The contents of the questionnaire was discussed such as title of the questionnaire with a little introduction, demographic questions, questions regarding consumer behavior before and after COVID and their change in perception towards slow fashion.

The main survey was conducted and the results and findings were analyzed based on the data received which would be the basis for the conclusion and recommendation.

5.3.3 Major Findings and results

Many results were compared and analyzed. `The results included thea swift change in the consumer behavior from being a fast fashion buyer to a sustainable buyer due to the impact of COVID. The results also addressed the consumers interest in knowing about the materials used, the safety of the workers and artisans and valuing money and think ethically before purchase. Before the pandemic, most of the respondents were fast fashion buyers even if they were aware of the ill effects of fast fashion on the environment. But, due to COVID, the respondents have become more supportive towards Indian brands and artisans and are interested to know the details of the products and the brand initiatives towards the environment and safety of workers.

5.4 DISCUSSION

According to the study, it has been revealed that before the pandemic, the changing dynamics of the fashion industry, such as the fading of mass production, increase in number of fashion seasons, and modified structural characteristics in the supply chain have forced retailers to desire low cost and flexibility in design, quality, delivery and speed to market. In addition to speed to market and design, marketing and capital investment have also been identified as the driving forces of competitiveness in the fashion apparel industry. With the emergence of small collections of merchandise, fashion retailers encouraged consumers to visit their stores more frequently with the idea of 'Here Today, Gone Tomorrow'. This impacted the lives of the artisans and workers and also impacted the environment due to increased carbon footprint.

But, the COVID-19 pandemic that emerged from Wuhan, China in 2019 impacted the world economy and the fashion the industry as well. In India, the pandemic along with the political instability due to the stand-off situation between India and China also affected the industry. The lockdowns affected the orders resulting in workers being furloughed and small Indian designers being affected. But, the ban of Chinese brands due to political stand-off and the rising consciousness among the consumers resulted in an opportunity for slow fashion inIndia. The change in consumer pattern as observed in the analysis explains the growing awareness and consciousness among the consumers for what they wear and how it impact the environment.

5.5 CONCLUSION

Fashion Industry is a major pollutant industry which has impacted the environment, workers and the consumers as well. But, COVID-19 being a curse for the entire world, indirectly brought positive changes amongst the consumers as well as in the environment. Some of the conclusions of the results and findings are summarized as follows:

a. Most of the consumers were frequent buyers who purchased clothes in one –two months but they call themselves as sustainable buyers. This indicated that they are not well aware of the term “Sustainability” and what it exactly means.
b. 33 out of 52 respondents agreed that they were aware of the ill effects of fast fashion on the environment, workers and consumers but continued purchasing apparels.
c. 50% of the consumers are unaware about the concept of Slow Fashion and those who are aware, 41.7% of them considered it to be over-priced and 23% of them considered it to be untrendy.
d. But, COVID-19 has left a positive effect on the consumers as 86.5% of them have turned into conscious consumers and have started valuing money and think ethically before purchasing. They have started making more sustainable choices and want to buy from trusted brands only. They are also keen to know about the materials used the worker’s safety throughout the manufacturing process.
e. Most of the consumers look for comfort and have started spending less on apparel and started to style their old apparels in order to save money.
f. Most of the consumers are willing to support Indian designers and artisans and see Slow Fashion as the future of the Industry.
g. 67.3% of the consumers are accepting Slow Fashion and chose to buy handloom apparel over branded apparel.

By analyzing all the details, it could be concluded that the future brands could choose to make organic and comfortable coordinate sets constructed by artisans for the consumers and that could be styled in different ways with different outfits. This would be economical, sustainable and viable solution for the Indian designers, consumers, workers and economy as a whole.

5.6 RECOMMENDATIONS

Even though the survey has been done to learn about the change in consumer behavior, from this some useful findings and results were obtained but there is still a requirement for further investigation to analyze the actual change in consumer behavior towards slow fashion. So, the few recommendations that can be given are as follows:

a. For this research only Kolkata was taken into account for the survey. Further research can include other cities as well to understand the change in consumer needs better.
b. A small survey of 52 responses was conducted due to time constraints, further research can go for larger surveys to get more quality data.
c. The research paper couldn't cover all the segments of Fashion Industry that were impacted by COVID. Future research papers can research on the other segments which are not covered in the research paper.
d. Due to the pandemic situation, interviews with the consumers, artisans and workers could not be conducted so further investigation could be done to understand the impact of COVID better.
e. Due to time constraints, pilot survey could not be conducted to test the questionnaire. This could be included in further research paper to make the results clearer and accurate.

CHAPTER 6

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APPENDIX 1

QUESTIONNAIRE

Change in Consumer Behavior due to COVID-19

* Required

1. Name *

2. Email ID *

3. Age *

   Mark only one oval.

   - 18 years - 23 years
   - 24 years – 30 years
   - 31 years – 35 years
   - 36 years – 40 years

4. Gender *

   Mark only one oval.

   - Male
   - Female
   - Transgender

5. Occupation *

6. Were you a frequent buyer before COVID? *

Mark only one oval.

- Yes
- No

7. How frequently you purchased? *

Mark only one oval.

- Every month
- Every 2 months
- Every 6 months
- More than 6 months

8. Were you a sustainable buyer(who buys products with improved sustainability footprints that also meet price, performance and quality requirements) or a fast fashion buyer(who buys inexpensive designs that are fashion trends and are cheaply available) ? *

Mark only one oval.

- Sustainable buyer
- Fast Fashion buyer

9. If you were a fast fashion buyer, how likely were you aware of the ill effects of fast fashion on the environment, workers and consumers?

Mark only one oval.

- Very likely
- Likely
- Unlikely
- Very Unlikely

10. On a scale from 0-10, how much would you rate yourself in terms of buying the product while thinking about the impact on the environment? *

Mark only one oval.

1	2	3	4	5	6	7	8	9	10

11. Did you hear about the concept of Slow Fashion before COVID? *

Mark only one oval.

- Yes
- No
- Maybe

12. If yes, what perception did you hold about " Slow Fashion" ? (choose any 2)

Mark only one oval.

- Over – priced
- unstylish or untrendy
- Over – hyped
- Boring
- Other: ____________________

COVID-19 IMPACT

COVID impact on Indian Fashion consumers and their behaviors.

13. Has COVID made you a conscious consumer? *

Mark only one oval.

- ( ) Yes
- ( ) No

14. If yes, in what ways has it made you a conscious consumer? *

Check all that apply.

- [ ] I value money and think ethically
- [ ] Shopping more health consciously
- [ ] Making more sustainable choices
- [ ] Shopping more cost consciously
- [ ] Only buying from brands I know and trust
- [ ] value artisans and workers
- [ ] Study about the materials used and manufacturing process followed in making apparel before purchasing.

15. To what extent do you agree or disagree with the following statements: *

Mark only one oval per row.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
I would like fashion brands to tell me about where the materials used in their products come from.	⬭	⬭	⬭	⬭	⬭
I am interested in learning about what, if anything, fashion brands do to minimize their impact on the environment.	⬭	⬭	⬭	⬭	⬭
I am interested in learning about what fashion brands do to protect their workers' human rights.	⬭	⬭	⬭	⬭	⬭
I am interested in learning about what fashion brands do to improve the lives of people in the societies where they manufacture their products.	⬭	⬭	⬭	⬭	⬭
I would like to know how my clothes were manufactured.	⬭	⬭	⬭	⬭	⬭

16. Due to COVID, how has your purchasing behavior affected? (Select all that apply) *

Check all that apply.

- [ ] You started buying more of comfortable clothes (tees, pyjamas, shorts)
- [ ] You started investing less on apparel and more on essential items.
- [ ] You have started styling old apparels in different ways
- [ ] You have shifted to sustainable brands for quality and durability
- [ ] You have started buying more and more clothes due to COVID discount offers

17. As artisans are worse hit by the pandemic, do you agree consumers would be willing to buy from Slow fashion brands to support Indian designers and local artisans ? *

Mark only one oval.

- Strongly Agree
- Agree
- Neutral
- Strongly Disagree
- Disagree

18. If given a choice between a handloom apparel and a branded apparel, which one will you prefer more? *

Mark only one oval.

- Handloom Apparel
- Branded Apparel

19. Slow Fashion is the future of the Industry. *

Mark only one oval.

- Strongly disagree
- Disagree
- Neutral
- Agree
- Strongly agree

20. Do you believe that Post COVID consumers would be equally health and environment conscious as they are now? *

Mark only one oval.

- Yes
- No
- Maybe