

Do consumers prefer animal friendly fashion? An empirical study in Italy and Argentina

Abstract

Our research examines consumers' preference for a responsible fashion product in a developed country. More generally, the research focuses on the animal friendly issue. In order to analyze in which manner the animal friendly attribute impact the customers' preference in developed and developing countries, we carried out a conjoint analysis that was applied to the case of clothes, in two countries contexts (Italy and Argentina). Then, we conducted a cluster analysis, grouping the respondents according to their utility functions and combining them with information collected about the socio-demographic and behavioral features.

The results from the conjoint analysis conducted with Italian and Argentinian consumers (n= 199) reveal that the Argentinians give more importance to the animal welfare than the Italians do. In addition, the cluster analysis indicates the existence of two transnational clusters with different preferences towards animal friendly fashion.

This research gives interesting managerial implications for manufacturers operating in fashion apparel industry by giving insights on the consumers' preference for animal friendly fashion in the two cases of developed and developing countries.

Keywords: Animal friendly, Fashion industry, Developed and developing countries, Conjoint analysis, Consumers' preference.

Introduction

In the last years a shift has been noted in company attitudes towards responsible issues with many enterprises moving to more proactive management model (Fraj and Martinez, 2006). However, this voluntarism cannot lead to satisfactory results if the developing countries (DCs) are not involved. Environmental challenges are global and therefore require actions from all stakeholders in both developing and developed countries (Hart, 1997). Yin and Zhang (2012) argue that sustainable development issue is beginning to be taken seriously in developing countries because of pressure from international community. But beyond the environmental policies put in place by governments, the role of consumers remains crucial. According to De Pelsmacker *et al.* (2005), consumers have the power to influence corporate practices through their buying behaviour and can boost CSR practices in developing countries by making stronger demands for ecological products.

Today, the consumers' influence in developing countries remains little. In fact, Auger *et al.* (2010) believe that responsible consumption is first and foremost a western phenomenon, and consider that environmental and social attributes influence consumer behaviour more significantly in developed countries than in developing countries. Auger and Devinney (2007) impute the difference in ethical awareness to more favourable conditions in developed countries, such as the emergence of pressure groups, the increasing media interest in ethical issues, the interest of large organisations in CSR practices, and the availability of responsible products with a superior quality. However, Arli and Lasmono (2010) play down the low ecological awareness in developing countries. They consider that responsible consumption is beginning to take root in these countries, and that the shift towards responsible consumption is not unique to developed countries. Our research contributes to this debate by examining consumers' preference for animal friendly fashion products in two countries with different levels of development: a developed country (Italy) and a developing country (Argentina).

The choice of the fashion industry for this research is particularly interesting. It is highly globalized and many companies have chosen to relocate their production to developing countries to benefit from low costs. For instance, Laudal (2010) notes that around 70% of clothes used in the European Union come from developing countries. It is therefore obvious that consumers in both developed and developing countries are concerned by the environmental and social issues characterizing this industry.

In the literature on the ethical issue in the fashion sector, authors have mainly explored environmental impacts (Kirsi and Lotta, 2011) and human well-being (Ritch, 2014).

However, the issue of animal welfare has been largely neglected despite the fact that each year, more than 50 million animals are violently killed to benefit the fashion industry (Born Free USA, 2014). Planthoin (2016) confirms this lack of awareness concerning the animal welfare issue “*those who have been highlighting the issues about animal welfare have been ridiculed as emotional activists and extremists or are simply ignored by an industry that has chosen to turn a blind eye to a subject that is far more complicated to deal with due to traditions, cultures, and a lack of industrial awareness*” (Planthoin, 2016, p. 51). Thus, this research contributes to filling this gap.

The structure of this article is as follows. The next section is devoted to the literature review on ethical fashion and responsible consumers’ behavior in both developing and developed countries. This is followed by the description of the research method and the presentation of the results. Finally, the findings are discussed, the limitations of the research are exposed and avenues for further perspectives are suggested.

1. Literature review

The fashion industry faces the challenge of sustainability. However, until recently, sustainable development and fashion were an oxymoron (Aakko and Ritva Koskennurmi-Sivonen, 2013). Indeed, unnecessary consumption, which runs contrary to the principles of sustainability, is the driving force in the fashion industry (Kozlowski *et al.*, 2012). According to Kim and Hall (2015), the fashion industry is considered as one of the most unsustainable industries due to the massive consumption of precious resources. The strategic model of fashion brands is based on regular changes in style and low prices (Nagurney *et al.*, 2015). In effect, products are not made to last but rather to be replaced by the next trend. Aakko and Koskennurmi-Sivonen (2013) indicate that in many cases, the purchasing of new garments is cheaper than repairing the old ones.

The literature mentions the emergence of the notion of “fast fashion” corresponding to goods that are mass-produced, cheap, fashionable and with a fast stock turnaround (Henninger *et al.*, 2015). Childs (2014) attributes the very strong growth of fast fashion to a number of factors such as the increase of sourcing from low cost developing countries, changes in consumers’ attitudes, and high-impulse buying. Consumers are buying more and more than their real needs (Kim and Hall, 2015). The apparel and accessories are among the products that are most frequently purchased and replaced. This pushes toward overconsumption of resources (eg. water, cotton, energy) and use of chemicals (Nagurney *et al.*, 2015). Nagurney and Yu

(2012) indicate that the textile companies pollute approximately 200 tons of water per ton of production. This strategic model also encourages more rapid disposal of fashion apparel (Nagurney *et al.*, 2015). The average weight of clothing that is rejected by a typical American each year is about 30 kg (Ha-Brookshire and Hodges, 2009). In the United Kingdom, textile waste increased between 2005 and 2010 about 2 million tons a year (Kirsi and Lotta, 2011).

The fashion industry is also generally held responsible for major social issues, in particular the deterioration of working conditions in the factories, the exploitation of children and animal abuse (Ritch, 2014). Most mass-market retailers such as H&M, Nike and Zara procure their materials from developing countries where the social and environmental conditions of production are not acceptable (Kozlowski *et al.*, 2012). For instance, the monthly wage in 2013 of a worker in the fashion industry remains very low (39 \$ per month in Bangladesh, 80 \$ in Cambodia, 71 \$ in India, 79 \$ in Pakistan, 73 \$ Sri Lanka, and 78 \$ in Vietnam) (Haque and Azmat, 2015). Many ethical scandals have been reported in the supply chains of numerous global fashion brands (Perry and Towers, 2013). In recent years, some accidents in garment factories have been the subject of extensive media coverage because of their magnitude. In September 2012, a fire at a garment factory in Karachi (Pakistan) killed more than 300 workers, and in May 2013 the collapse of Rana Plaza in Bangladesh killed 1,100 people (Lund-Thomsen and Lindgreen, 2014).

In this context of increasing criticism and scandals, ethical fashion industry has developed. However, ethical fashion is more expensive, not available in high street fashion retailers and did not follow fashion trends (Ritch, 2014). Contrary to fast fashion which is linked with aesthetic values (self-oriented values), the ethical fashion reflects other orientations, through considering extrinsic factors such as the conditions of garment workers in factories and the protection of the environment (Ritch, 2014). Some authors (Henninger *et al.*, 2015) use the term of “slow fashion” which is described as fashion that is not mass produced and does not favor a rapid stock turnover.

Two strategic orientations can be observed in the case of the ethical fashion market. First, some brands have introduced sustainable practices at different stages of their value chain. Kim and Hall (2015) give the example of H&M which launched a green collection called “Conscious”. But in a context of multiplication of greenwashing cases and the development of a strong suspicion of consumers towards the responsible commitment of companies, the question of the credibility of such initiatives arises.

Second, other brands have made with sustainability their new business model. Patagonia and Stella McCartney are certainly the best examples of successful ethical fashion companies thanks to their management strategy based on sustainable development. They highlight well-designed information that balances the technical challenges with aesthetic appeal (Kim and Hall, 2015).

1.1. Consumers' preference towards ethical fashion products in developing and developed countries

Consumers represent an important stakeholder, they have the power to influence corporate practices through their buying behaviour (De Pelsmacker *et al.*, 2005). In general, consumers support altruistic corporate behaviors that are beneficial for all of society and tend to reward companies' CSR efforts (Marin *et al.*, 2016).

The literature on responsible consumption, generally focused on consumers in developed countries¹, often evokes the increasing sensitivity of consumers in relation to environmental and social issues. They express this sensitivity by switching to more responsible consumption. Consumers usually accept that the prices of green products are higher than those of their conventional counterparts (Harris and Freeman, 2008; Gam *et al.*, 2010). In the case of the fashion sector, it is necessary to go back to the early 1990s to find the first movement of consumers that challenged working conditions in developing countries (Wong and Chang, 2005). Consumers today are more aware of the severity of sweatshop issues on health, safety and human rights. Some of them have decided to boycott sweatshop products (Phau *et al.*, 2015) and accept to pay more for ethical fashion in order to appease their moral values (McGoldrick and Freestone, 2008).

However, despite this increasing sensitivity of consumers, they are not willing to sacrifice some functional attributes of products in favor of the ethical one. For example, Auger *et al.* (2008) found that purchase intentions decrease massively when the functional attributes are bad, even when the social attributes are good. In the case of luxury fashion products, consumers perceive negatively recycled products (Achabou and Dekhili, 2013). The introduction of recycled materials in a luxury garment reduces the consumers' preference for the product because recycling does not appear to be associated with "prestige".

¹An examination of the literature shows that 90% of research on responsible consumption concerns European and North American consumers (Cotte and Trudel, 20029).

In general, research on the consumption of ethical fashion has shown that, despite their positive attitude toward environmental and social issues, consumers are less likely to purchase eco-fashion products (Joergens, 2006; 2010). Niinimäki (2010) mentions an attitude-behavior gap of consumers' environmental protection interest and ethical consumption in the fashion market. The author concludes that fashion consumers differ from consumers in other sectors when making ethical consumption decisions.

In developing countries, it is the low awareness of consumers in relation to environmental and social issues that is mentioned. By examining the behavior of Indian consumers in the fashion market, Gupta and Hodges (2012) have observed that the most important factors that affect their decision were price and quality of the product. This result is explained by the low awareness of Indian consumers in relation to ethical issues. However, some researchers have highlighted the existence of four powerful stakeholders that can provide a platform of support for the development of CSR and responsible consumption in developing countries: development agencies, trade unions, international NGOs, and business associations (Visser, 2008). Schmidheiny (2006) estimates that many Latin Americans see the CSR as a chance for positive changes in the face of important poverty, corruption, economic stagnation and environmental degradation.

1.2. How consumers perceive the animal welfare attribute?

If the focus on sustainability in fashion has placed the issue of human well-being at the center of concern, the issue of animal welfare has long been neglected (Palnithin, 2016). It is only recently that it has aroused the interest of politicians. Indeed, in the last years the animal welfare issue has become a point of debate among the public and political circles (Elbakidze and Nayga, 2012). Calls for strengthening of legislation on the treatment of animals and the proliferation of new laws have been observed across the Western countries restraining what people can do to animals (Sneddon et al., 2010). Animal welfare can be understood as three basic levels: the animal should feel well, it should function well and it should lead a natural life (express their natural behavior). Animal suffering occurs when “*they experience something difficult or painful that is too prolonged and too severe to cope with as induced by human subjectivity*” (Palnithin, 2016, p. 62).

Some recent newspaper articles (Gibson, 2015; Bolton, 2015) have shown, through videos, animal abuse in crocodile's farms (Texas and Zimbabwe). These scandals have pushed brands to react through two types of strategic actions. On one hand, some companies maintained their

use of animal raw materials in their productions but put in place some initiatives in their supply chain. For example, the Italian textile brand Loro Piana, as part of its commitment since 1994 to safeguard the vicunas, created in 2008 the first nature reserve in Peru. Other companies have taken a more advanced step by opting for vertical integration. This is the case of LVMH and Hermes brands that have bought crocodile farms in Australia. On the other hand, some brands have decided to replace the animal leather by an environmentally friendly raw material. This is the case of Stella McCartney which presents its ecological raw materials as innovative and luxurious and animal leather as common and almost old-fashioned raw material.

These different strategic responses to the issue of animal welfare may raise questions about their impact on business performance. According to De Jonge and Van Trijp (2013), from a long-term perspective, implementing actions in favor of animal welfare can have several advantages. It can improve market access when demand from retailer is strict; enhance production efficiency or provide added value to the products. Other studies however point out that, in practice, creating farming system in which animals are able to satisfy their natural behavior and meet their natural involves a lot of investment (Vaarst and Alrøe, 2011). In the same way, De Jonge and Van Trijp (2013) argue that the commitment to animal welfare can be an important source of uncertainty especially concerning the consumer willingness to pay a premium for the animal welfare attribute.

The influence of the animal welfare attribute on consumers' preference was particularly explored in the case of food products. Consumers, believing that their own health can be impacted by the health of the animals they consume, consider the animal welfare as a quality cue (Hustvedt *et al.*, 2008; Joergens, 2006). For example, consumers are willing to purchase eggs produced with animal-friendly management practices (Sneddon *et al.*, 2010). In contrary, some studies postulate that animal welfare is not the most decisive factor in the choice of food products. De Jonge and Van Trijp (2013) indicate that despite the tendency of increased concerns about animal welfare, consumers choose meat produced in a conventional production system, because the price was the most influential factor in the decision-making process. In another research, Elbakidze and Nayga (2012) observed that giving information concerning animal welfare in the case of dairy products don't increase significantly willingness to pay. According to Verbeke (2009), many consumers consider animal welfare as a supporting benefit.

If the consumers' response to animal welfare and animal friendly products have been extensively studied in the case of food items, this issue has been ignored in the case of apparel products despite the intensive use of animal fibers (eg. skins and fur) in the clothing and textiles productions (Sneddon *et al.*, 2010; Hustvedt *et al.*, 2008). Hustvedt *et al.* (2008) support the idea that animal welfare is little important for consumers when purchasing clothes. Individuals seek for individual benefit and take into consideration personal and financial needs (social recognition and self-respect). They can also seek to express their ideology and self-identity through their clothing (egoistic motives) (Jägel *et al.*, 2012). Leire and Thidell (2005) precise that the proximity of the product to the consumer's body or his personal activities is crucial factor in their using of ethical information. However, Hustvedt *et al.* (2008) believe that consumers could be less likely to relate the health of fiber-producing animals to the quality of the animal fiber products they buy. Conversely, they can attach more importance to other social responsibility attributes, like child labor, employee abuse or imprisonment and minimum wage.

If some clothing brands chose recently to integrate the animal welfare attribute in their products, under organizations pressure such as PETA (People for the Ethical Treatment of Animals), the academic literature pay little attention to the relevance of this practice, hence the relevance of this study focusing on the consumers' response to the animal welfare attribute. More particularly, our research aims to determine the consumers' preference for animal friendly fashion products.

2. Methodology

2.1. Method selection

In order to analyze in which manner the animal friendly attribute impacts the consumers' preference in developed and developing countries we carried out a conjoint analysis that was tested with two samples: Italians and Argentinians. We chose a jacket and used "Zara" brand for Italian market and "Falabella" for Argentinian one. The two brands are equivalent.

The conjoint analysis is among the most popular techniques for measuring consumers' preference and considered to guarantee valid and affordable results (Green and Srinivasan, 1990). According to Green and Srinivasan (1978), the term conjoint analysis can be broadly referred to "any decompositional method that estimates the structure of a consumer preferences given his overall evaluations of a set of alternatives that are pre-specified in terms of levels of different attributes".

Conjoint analysis is a relatively new approach for evaluating environmental values (Alriksson and Öberg, 2008). But, since the mid-1990s, it has been applied to a number of environmental issues such as energy, recreation, environmental evaluation, ecosystem management, consumers' preference for environmentally certified products, and environmental policy development.

2.2. Measurement

The relative importance of selected product attributes was estimated on the basis of the preferences assigned to the configured product profiles collected through an on line-based consumer survey. This resulted in utility (or part-worth) functions for each individual, reflecting respondents' preference for different attributes, and consequently, the average importance of each product attribute was calculated.

Green and Srinivasan (1990) recommend to include no more than six attributes in the design of product profiles, and to limit the number of levels for each attribute. Thus, in our study, the conjoint analysis included three attributes: the proportion of real fur in the jacket, information about animal treatment, and price.

Basing on the idea that consumers may demonstrate different preferences according to the proportion of real fur used in the product, we distinguished three different options: jacket entirely made of real fur (100% real fur), jacket with real fur inserts on the front and on the back (70% real fur) and jacket with real fur inserts on the cuffs and on the neck (30% real fur). Moreover, consumers may be sensitive to the explicit information about animal treatment. This is the reason why we introduced the two levels: animal-derived materials used come from animals raised in a responsible way, absence of information about animal treatment. Last we fixed three price ranges corresponding to the price levels operated on the market by Zara and Falabella brands.

The attributes and the relative levels selected for the analysis are reported in Table 1.

Table 1: The levels of the attributes tested

Attributes	Levels
Proportion of real fur	Jacket entirely made of real fur (100% real fur) Jacket with real fur inserts on the front and on the back (70% real fur) Jacket with real fur inserts on the cuffs and on the neck (30% real fur)
Information about animal treatment	The company declares that the animal-derived materials used come from animals raised in a responsible way

	None information	
Price	Zara	Falabella
	49,99 €	178,00 €
	79,99 €	258,00 €
	149,99 €	362,00 €

In order to reduce the number of alternatives submitted to the respondents we adopted a fractional factorial design using R software. We thus implemented eleven alternatives for each conjoint analysis, each of them resulting from a different combination of the proportion of real fur, the information on animal treatment and the price level. These alternatives were presented to the respondents in the form of labels (Fig. 1) providing a more realistic description of stimuli as recommended by Green and Srinivasan (1978). Respondents were asked to assign to each of the eleven alternatives a rating using a Likert scale going from 1 (I don't like it at all) to 9 (I like it a lot).

Figure 1: Examples of tested labels

<p>Zara Jacket with real fur inserts on the front and on the back</p> <p>The company declares that the animal-derived materials used come from animals raised in a responsible way</p> <p>Price 49,99 €</p>	<p>Fakabella Jacket with real fur inserts on the front and on the back</p> <p>The company declares that the animal-derived materials used come from animals raised in a responsible way</p> <p>Price 178,00 €</p>
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In a final part of the questionnaire, we asked consumers about their consumption habits, their attention towards environmental issues and their socio-demographic characteristics.

To complete study, we have conducted a cluster analysis, grouping the respondents according to their utility functions and their socio-demographic and behavioral information. The objective of this complementary analysis is to identify clusters basing on the different value assigned to the investigated social dimensions.

2.3. Sample

Two questionnaires were submitted online, using Quick Survey website, from March to April 2015 in Italy and from July to August 2016 in Argentina. The total number of respondents

was 106 for Italian survey and 93 for the Argentinian one. Even the sample was random, we tried to use differentiated samples according to the selected brands (see table 2).

Table 2 – Socio-demographic characteristics of respondents

Variables		Number of respondents for Italian survey	Number of respondents for Argentinian survey
Gender	Male	48	17
	Female	58	76
Profession	Student	19	6
	Workman	13	0
	Employee	39	45
	Manager	0	6
	Freelancer	14	12
	Unemployed	8	1
	Retired	5	2
	Other	8	21
Income	Low	57	26
	Medium	41	38
	High	5	29
Total number of respondents		106	93

3. Findings

3.1. The importance of the social attribute

Basing on the data collected from the two surveys, we calculated the relative importance of the three tested attributes using the following formula:

$$(1) \quad IR_j = \frac{Max[U_j W_{ji}] - Min[U_j W_{ji}]}{\sum_{i=1}^k (Max[U_j W_{ji}] - Min[U_j W_{ji}])}$$

where IR_j is the relative importance of the “j” attribute; k is the number of the attributes included in the analysis; $Max [U_j W_{ji}]$ is the maximum utility value associated to the W_{ji} level of the “j” attribute of the “i” product profile; $Min [U_j W_{ji}]$ is the minimum utility value associated to the W_{ji} level of the “j” attribute of the “i” product profile.

The IR_j calculated are reported in Table 3.

Table 3 – Relative importance of the attributes for Italian and Argentinian consumers

Attributes	Italian	Argentinian
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Proportion of real fur	27,56 %	30,65 %
Information about animal treatment	26,96 %	31,88 %
Price	45,48 %	37,46 %

In the Italian analysis, the importance percentages of the three attributes “proportion of real fur”, “information about animal treatment” and “price” are 27,56%, 26,96% and 45,48% respectively. The price remain the most important attribute. In this study the lowest prices (49,99 €) corresponded to a higher level of utility (utility estimates = +0,1639), while the higher prices (79,99 € and 99,99 €) corresponded to a lower level of utility (utility estimate = 0,0652 and -0,2291 respectively) (see table 4). The utility estimates assigned to the levels corresponding to the different proportion of real fur included in the jacket, reveal that the respondents assign the highest value to the jackets entirely made of real fur (utility estimate = + 0,0558), a lower value to the jackets with a medium (real fur on the front and on the back of the jacket) and low (real fur on the cuffs and on the neck) proportion of real fur (utility estimate = -0,0031 and -0,0248 respectively).

Also in this case, the utility estimates of the third attribute reveal that the presence of an information about animal treatment is perceived positively by the respondents (utility estimates = + 0,2235), while the absence of this information is associated to a lower level of utility (utility estimate = -0,2235).

Table 4 – Part worths of the attributes for Italian and Argentinian consumers

Attributes	Levels	Italian	Argentinian
Proportion of real fur	100% real fur	0,0558	0,1038
	70% real fur	-0,0248	-0,1387
	30% real fur	-0,031	0,035
Information about animal treatment	The company declares that the animal-derived materials used come from animals raised in a responsible way	0,2235	0,3264
	None information	-0,2235	-0,3264
Price	Low	0,1639	0,1803
	Medium	0,0652	0,0357
	High	-0,2291	-0,2159
Intercept		4,0458	3,1507

In the case of Argentinian analysis, the importance percentages of the three attributes “proportion of real fur”, “information about animal treatment” and “price” are 30,65%, 31,88% and 37,46% respectively. As expected the lowest price (178 €) corresponded to a higher level of utility (utility estimates = +0,1803), while the highest price (362 €) corresponded to a lower level of utility (utility estimate = -0,2159). As in the Italian case, the utility estimates assigned to the levels corresponding to the different proportion of real fur included in the jacket, reveal that the respondents assign the highest value to the jackets entirely made of real fur (utility estimate = + 0,1038), a lower value to the jackets with a low proportion of real fur (real fur on the cuffs and on the neck) (utility estimate = + 0,0035) and a very low value to the jackets with a medium proportion of real fur (real fur on the front and on the back of the jacket) (utility estimate = -0,1387).

Even the relative importance of the attribute related to the information about the animal treatment is not the highest compared to the importance of the other attributes (31,88%), the utility estimates reveal that the presence of an explicit information about animal treatment is perceived positively by the respondents (utility estimates = + 0,3264). On the other hand, the absence of these information is associated to a lower level of utility (utility estimate = - 0,3264).

3.2. The cluster analysis

In order to test if the respondents have different reactions toward social dimension we carried out a cluster analysis using the k-means technique. The variables used to identify the best number of clusters were the utility estimates assigned by the 199 respondents to each virtual product profile. Basing on the elaboration made using R Project software, we decided to select 2 clusters (within cluster sum of squares by clusters: 3196.127 1274.697; between_SS / total_SS = 63.4 %).

According to the elaborations presented above we decided to pick the clusters mainly differing according to the rating assigned to the 11 product profiles. Two clusters were obtained: *i*) Cluster 1 – 101 respondents; *ii*) Cluster 2 – 98 respondents (see table 5).

Table 5 – Relative importance of the attributes in the two clusters

Attributes	Cluster 1	Cluster 2
Proportion of real fur	25,66	32,46

Information about animal treatment	35,73	22,59
Price	38,61	44,95

While in both clusters the most important attribute is price (relative importance 38,61% for cluster 1 and 44,95% for cluster 2), the two segments reveal some interesting differences concerning the other attributes. Indeed, if the first cluster assigns a high importance to information about animal treatment (relative importance = 35,73% against 25,66% to the proportion of real fur), the second cluster assigns a higher importance to the proportion of real fur (32,46%) and a lower importance to information about animal treatment (22,59%). This bring us to define the first cluster as “animal friendly” while the second cluster might be defined as the “real fur lovers”.

Combining the results of the cluster analysis with the information collected about the socio-demographic and behavioral features of the respondents, something interesting emerge.

Table 6 – Socio-demographic features in the two clusters

Variables		Cluster 1	Cluster 2
Average age		36,58	34,5
Gender	Male	51	14
	Female	50	84
Profession	Student	16	9
	Workman	8	5
	Employee	36	48
	Manager	2	4
	Freelancer	14	12
	Unemployed	5	4
	Retired	5	2
	Other	15	14
Income	Low	44	39
	Medium	43	36
	High	13	21
Total number of clusters		101	98

Specifically, by focusing on the socio-demographic features (Tab. 6) we can observe that, while, the two clusters are similar in terms of average age (36,58 years old in cluster 1 and 34,5 in cluster 2), in cluster 1 the males and females proportion is the same (about 50% men and 50% women), the cluster 2 is mostly composed of women (86% against 14% men). Looking at the professions, the majority of consumers included in cluster 1 are employees (36%) as in cluster 2 (49%), but this reflects the general features of the global sample (Tab. 2).

Looking at the answers to the questions about regarding worker's conditions, environment, animal welfare and labelling not so many differences emerge (see appendix). Indeed, while the second cluster seems to be less sensitive to animal friendly issues basing on the results of the cluster analysis, the ratings assigned by this cluster to the questions regarding sustainable issues are mostly higher than those assigned by the respondents included in the first cluster. This is mostly true for the questions regarding workers' conditions, environment in general, animal friendly and labelling.

Especially, consumers included in cluster 1 assigned lower ratings (measured as level of agreement and disagreement using a five-point Likert scale) to the concern with sweatshop issues affecting workers in the fashion apparel manufacturing business (average ranking: 3,75 against 4,13 in cluster 2), and to the interest in the labor practices behind the purchased apparel (average ranking: 3,76 against 4,20 in cluster 2).

Passing from the questions regarding the general concern and individual interest towards worker's conditions to those regarding the general knowledge about the workers' conditions in fashion industry, the rankings decrease in both clusters. Asking to consumers if they believe to be sufficiently informed about sweatshop issues in the fashion apparel manufacturing business, the average ratings go down to 2,78 in cluster 1 and to 3,08 in cluster 2. Ratings get lower for questions about the behaviors adopted by fashion apparel manufacturers in terms of workers' conditions. Particularly, consumers seem less convinced of the fact that in fashion apparel industry the employees work no more than 40 hours per week (mean= 2,61 in cluster 1 and 2,70 in cluster 2), manufacturers provide safe workplaces to employees (mean= 2,56 in cluster 1 and 2,51 in cluster 2), and usually don't use child labor (mean= 2,65 in cluster 1 and 2,20 in cluster 2). This reveal that, independently from the general attitude towards ethical issues, all the interviewed consumers are generally skeptical towards policies adopted by fashion apparel manufacturers in terms of workers' conditions and this is an important threat for companies operating in this sector and investing on ethical issues.

Concerning the purchasing behavior of consumers questioned, many declare that they avoid buying products that are made from endangered animals (mean= 3,35 in cluster 1 and 4,40 in cluster 2) and that they take into account labels when they are shopping (cluster 1: 3,23; cluster 2: 3,39).

This answers in addition to the previous analysis might confirm the importance of conducting a conjoint analysis revealing that, sometimes even when consumers declare to be more

sensitive to certain issues – specifically ethical issues – when they have to decide to buy a product they act differently, coherently with the well-known “intention-behavior gap”.

5. Contributions, limitations, and research perspectives

5.1. Methodological contribution

Considering the specific nature of responsible consumption, the paper gives some interesting insights on applying different methodological approaches for the study of this phenomenon, especially in fashion industry.

The use of conjoint analysis to measure consumer preferences towards animal friendly fashion has many advantages. Although interesting applications of conjoint analysis evaluating the importance of sustainability in customer preferences are reported in the research of Sammer and Wustenhagen (2005) and Rokka and Uusitalo (2008), only few studies (Achabou and Dekhili, 2013) used this method to measure the importance of sustainable product attributes in fashion industry. As confirmed in our study, the technique seems to be suitable to this aim, especially for resembling closely the real-life consumer choice in which the trade-off between different product attributes takes place unconsciously.

Moreover, the results of the cluster analysis we conducted support the validity of the conjoint analysis as a technique particularly reliable in measuring consumer preferences towards responsible fashion. Indeed, the existence of a gap between a general declared sensitivity towards environmental issues and the intention to buy pro-environmental products is particularly evident thanks to the usage of conjoint analysis. Because conjoint analysis enables to describe real-life consumer choice, this might be the reason of contrasting results emerging in our analysis. These particularly regard the gap between the clusters identified according to the conjoint analysis output and their qualitative description emerging from the direct interviews.

5.1. Theoretical contributions

In addition to confirming and reinforcing the findings of previous research on responsible consumption in developing and developed countries, this paper contributes to the limited literature on the influence of the animal welfare attribute on consumers preferences in the case of fashion products.

First, our results show that price remains the main criterion of choice for both Argentinian and Italian consumers. Such finding is consistent with Gupta and Hodges (2012) conclusion

suggesting that even consumers of fashion products believe that CSR is important, price and quality are the key factors that influence their purchase decision. Price and quality come first. Second, surprisingly, the main result of our research reveals that consumers in developing countries are more sensitive to animal welfare issue than their counterparts in developed countries. Indeed, Italian consumers seems to be less sensitive to the animal welfare attribute than their Argentinean counterparts. This result contradicts the findings of several studies (Auger *et al.*, 2010; Swaidan, 2012) and confirms the trend towards the development of ethical consumption in developing countries evoked by Ariztía *et al.* (2014) and Arli and Lasmono (2010).

To explain this result, we can suppose that consumers in developing countries are more concerned by social issues related to the fashion industry, which can make them more sensitive to these issues than their counterparts in developed countries. This is particularly the case in Argentina where PETA (People for the Ethical Treatment of Animals) has recently (August 2015) highlighted, through videos, cruelty taking place in a farm called “Estancia La Librun”, a supplier of wool for well-known brands such Stella McCartney and Patagonia.

In developed countries, although difficult working conditions in the fashion factories have been the subject of widespread communication in recent years, due to the disasters that have occurred, the question of animal welfare is still unknown to the general public in developed countries. According to Gardetti (2017), because most fashion firms are not transparent, consumers are not aware of the problem of animal suffering associated with the fashion products they consume. For its part, Ritch (2014) consider that fashion consumption is expressive of self and status; consumers are indisposed to sacrifice their identity for productions issues from which they are distanced.

Third, our study give some interesting insights on the intention-behaviour gap (Carrington *et al.*, 2010; Auger and Devinney, 2007; Shaw *et al.*, 2007; Follows and Jobber, 2000) in responsible consumption. Our results, indeed, confirm that even if consumers declare that they are sensitive to environmental and social issues, this does not necessarily translate into their consumption behavior. Furthermore, this finding confirms the conclusions of Chan and Wong (2012) and Pookulangara and Shephard (2013) which consider that although fashion consumers show a positive attitude toward the protection of the planet, they rarely transform such attitude into ecofashion consumption. They continue to look for cheap and fast fashion.

Forth, consumers, despite their sensitivity to the issue of animal welfare, prefer a product manufactured entirely with animal fur. This result confirms the conclusions of Achabou and

Dekhili (2013) which showed a reluctance of the consumers for the mixture of recycled and virgin raw materials in a luxury fashion product. This result may seem surprising given the sensitivity shown by the respondents in relation to the problem of animal welfare. We can assume here that the use of animal fur is not perceived as illegal.

Finally, our study shows that cluster 2 “animal friendly” is largely composed of women. This result confirms the findings of Niinimäki and Hassi (2011) indicating that women are more sensitive than men to environmental issues in the case of textile products and those of Achabou and Dekhili (2013) showing that women are less reluctant toward the introduction of recycled materials into the luxury clothing product.

5.2. Managerial contributions

This research has interesting managerial implications especially for manufacturers operating in the fashion apparel industry giving some insights on the consumer preferences towards animal friendly fashion in developed and developing countries. Animal welfare groups, such as PETA, are increasingly active and exert strong pressure on policy makers, therefore maltreatment of animals can cause severe reputational damages for fashion companies (Gardetti, 2017).

The results of our research suggest to adopt different marketing strategies in terms of animal friendly in developed and developing countries. Indeed, even though in both the countries involved in the analysis price sensitive consumers emerge, the sensitivity towards animal friendly is different. While in Italy the presence of real fur is more appreciated, in Argentinian consumer preferences are higher towards information about animal treatment. This could bring managers operating in this business to adopt different marketing strategies, especially in terms of communication, addressing the different consumer targets.

In the case of developing countries, consumers are now sensitive to environmental and social issues. Western companies must therefore consider them as an important stakeholder. They must show that they are making efforts to reduce the negative environmental and social consequences of their activities. They can also highlight their contribution to economic and social development in the countries of production. We can take up the concept of industrial upgrading stipulating that the country of production gains greater experience in garment manufacturing and can gradually integrate full package supply (Perry, 2012).

From the cluster analysis interesting commonalities in the two countries emerge. These should be considered too, as opportunities and threats for manufacturers operating in fashion apparel industry.

On one hand, two distinct transnational clusters emerge: the “real fur lovers” and the “animal welfare”. This is good for a global manager who can plan to serve only a specific segment creating an ad hoc offering, developing special marketing mix strategies.

On the other hand, investigating the opinions of respondents about worker’s conditions, environment, animal welfare and labelling, not so many differences in the identified clusters emerge. Both the clusters seem to be quite sensitive towards environmental issues, although surprisingly the first cluster reveal a bit higher sensitivity towards these issues.

Furthermore, it is interesting to note that the two clusters evidence a common skepticism towards policies adopted by fashion apparel manufacturers in terms of workers’ conditions. This is an important threat for fashion apparel manufacturers suggesting them the need to invest more and more on the credibility of their responsible actions. To gain this credibility, fashion companies have several strategic options. Firstly, the choice of partners must be made with caution. The example of Stella McCartney is very illustrative. The company which built its business model on ethics signed a partnership with Adidas, involved in sweatshop controversy, to provide U.K. team uniforms for the 2012 London Olympics (Marati, 2012). In a context of consumer skepticism towards ecological discourse, fashion companies must ensure that the brand portrays a consistent ethical image (Phau et al., 2015).

Second, fashion brands should review their relationships with their suppliers in developing countries. For instance, the scandal of animal abuse which has affected the wool supplier “Estancia La Librun”, may call into question the credibility of the ethical commitment of Stella McCartney and Patagonia. In this sense, fashion companies can no longer simply impose their environmental and social standards through codes of conduct, this coordination model can lead to deviant behavior of suppliers in order to avoid costs associated with compliance (Lim and Phillips, 2008). They should develop close relationships with their suppliers, help them to strengthen their management capacities, and cooperate with local resources in developing countries to improve compliance of the suppliers with environmental and social standards (Lund-Thomsen and Lindgreen, 2014).

The option of vertical integration, although costly, can also be envisaged. This is the choice made, for example, by the luxury brands Hemes and LVMH that bought crocodile farms in

Australia. This allows the companies to have better control over the quality of the raw material supplied, as well as the animal husbandry conditions.

Third, fashion companies must reassure consumers about the quality of the materials used to replace those of animal origin. One possible avenue would be to use a high price which can be justified by highlighting innovative materials and important know-how.

5.3.Limitations and research perspectives

Our results are tempered by certain limitations, which are suggested to be areas of future inquiry. First, to make the sample more representative, future research should increase the sample size as well as the proportion of higher income. The second limitation concerns the product selected. In order to increase the external validity of our results, future studies should determine the extent to which the low valorisation of the social dimension identified in the case of a jacket (clothes) could cover other product categories.

The third limitation is related to the fact that only Italian and Argentinian consumers have been considered although the consumption of fashion products depends on individuals' culture (Kapferer and Michaut-Denizeau, 2014). Replicating this study with additional consumer samples in different countries is necessary.

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Appendix

Appendix1: Worker’s conditions in the two clusters

Item	Average rating Cluster 1	Average rating Cluster 2
I am concerned with sweatshop issues affecting workers in the fashion apparel manufacturing business.	3,75	4,13
As a consumer, I should be interested in the labor practices behind the apparel that I purchase.	3,76	4,20
Sweatshop issues should be actively discussed and confronted in society.	3,96	4,35
I believe that I am informed about sweatshop issues in the fashion apparel manufacturing business.	2,78	3,08
Fashion apparel manufacturers generally require their employees work no more than 40 hours per week.	2,61	2,70
Fashion apparel manufacturers generally provide safe workplaces for their employees.	2,56	2,51
Child labor is generally not used by fashion apparel.	2,65	2,20

Appendix2: Environment issue in the two clusters

Item	Average rating Cluster 1	Average rating Cluster 2
I'm concerned about the environmental issue at global level.	3,65	4,16
I think that is a moral obligation to use eco-friendly products.	3,61	4,05
This concerns me that people don't care about enough about environment.	3,78	4,19
I changed brands for the benefit of the environment.	2,75	3,19
I often purchase ecolabelled products for the benefit of the environment.	2,87	3,20

Table 3 – Animal welfare issue in the two clusters

Item	Average rating Cluster 1	Average rating Cluster 2
I avoid buying products that are made from endangered animals.	3,35	4,40
I avoid buying products made using child labor.	3,92	4,23
When I am shopping, I try to buy from companies that are working to improve conditions for employees in their factories.	3,61	3,86
I make an effort to buy products and services from companies that pay all of their employees a living wage.	3,46	3,67

Table 4 – Labelling issue in the two clusters

Item	Average rating Cluster 1	Average rating Cluster 2
I always give attention to the presence of labels.	3,27	3,30
I remark the products that mention	3,23	3,46

a label.		
I take into account labels.	3,23	3,39
I seek for labels.	3,19	3,11