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The slow establishment of Fashion-as-a-Service: Evidence from the changing behaviour of fashion consumers

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Abstract

Purpose. The aim of this study is to analyse current fashion consumer trends. Specifically, what influences the purchasing behaviour of consumers within the fashion industry? What contributes to shaping their customer journey? What makes them consider certain products rather than others? What variables are able to influence their buying behaviour?

Methodology. The systematic literature review (SLR) approach is used to collect data and analyse literature. Three key steps were included in the approach: Review planning, review conducting, and finding reporting.

Findings. The results indicated that the 56 academic publications could be categorized into six major content areas. Within these areas, purchasing behaviour is emerging that would seem to demand a marked change in the business model of fashion retailers, embracing the logic of Fashion-as-a-Service (FaaS), i.e. a distribution model in which clothing and accessories are provided to customers temporarily, often through rental or subscription.

Research limitations/implications. The limitations of the research lay in the impossibility of establishing a general framework of fashion consumer behaviour out of the results obtained. To this end, it would be necessary to combine the SLR carried out in this paper with one or more empirical investigations. Such an approach could represent a future development of the research.

Originality/Value. The results provide a very broad picture of changing consumer behaviour within the fashion industry. Furthermore, the identification of the latest fashion consumers behavioural trends provides useful insights for fashion retailers in order to adapt their business models and ensure their survival within an increasingly globalized and digitized market environment.

Keywords. Consumer behaviour, Fashion-as-a-Service, SLR approach, content analysis.

Paper type. Theory and methodology in services

1. Introduction

Fashion consumer behaviour has undergone and is still undergoing profound changes. These changes are due to technological innovations that have altered the way consumers interact with businesses. The advent of new digital channels, such as e-commerce and social media, has transformed the way consumers purchase clothing, thus redefining the role of traditional physical shops within an increasingly omnichannel market context (Lazaris and Vrechopoulos, 2014; Verhoef et al., 2015). Then, in the last three years the COVID-19 pandemic has further exacerbated this polarisation between online and offline channels, forcing

consumers to use digital shopping channels only and companies to reduce the number of stores (PwC, 2021; Roggeveen and Sethuraman, 2020). However, the frequent and intermittent lockdowns instead of helping to create new consumer trends seem to have merely accelerated dynamics already underway before the SARS-CoV-2 coronavirus outbreak. In fact, the gradual shift of fashion purchases to online sales channels, the multiplication of customer points-of-contact and, in general, the shift from a multi-channel to an omnichannel market logic, represent phenomena already underway before 2019 (Gao and Su, 2017; Lee et al., 2019; Simone and Sabbadin, 2018).

Against this background, the aim of this study is to analyse current fashion consumer trends using a systematic literature review (SLR) approach. Specifically, what influences the purchasing behaviour of consumers within the fashion industry? What contributes to shaping their customer journey? What makes them consider certain products rather than others? What variables are able to influence their buying behaviour? The answer to these questions provides useful insights for fashion retailers in order to better leverage their target costumers and ensure their survival within an increasingly globalised and digitised market environment.

The paper is divided as follows. The second paragraph is dedicated to the methodology used for data collection and literature analysis. The third paragraph presents the results of the content analysis (CA). In the CA the topics dealt with in the 56 selected publications are categorised within six thematic areas, three of which are set out in the following sub-sections. Paragraph four is devoted to the presentation of Fashion-as-a-Service (FaaS) as emerging business model within the fashion industry. Conclusions are stated in paragraph five.

2. Methodology

This study used a systematic approach to collect data and analyse literature. The systematic literature review (SLR) approach can "minimize researcher bias regarding the inclusion or exclusion of studies and to clearly channel how and to what extend the review was performed through transparency" (Carvalho et al., 2017). Three key steps were included in the approach: i) review planning, ii) review conducting, and iii) finding reporting. The approach to the review was inductive in nature, since the scheme was classified and modified as new information emerged during the review process, rather that opting ex-ante for an analytical framework. The detailed review process is shown in Figure 1.

The first step was keyword identification, which selected the studies related to our purpose. No specific starting year was identified and all publications corresponding to the keyword search were tracked up until 2023. This is due to the fact that research in this field is particularly new and growing and only one publication is present before the year 2000 – dating back to 1989 – and it was decided to keep it during this first phase in order to have the widest possible spectrum of analysis. Meanwhile, since this paper aimed to review all publications in the domain of consumer behaviour in the fashion industry, the authors chose terms covering the consumers' perspective ("fashion consumers") and their behaviour within the industry ("consumers behave* OR "customer journey"). The search terms were carefully checked in the titles, keywords, or abstract of studies in the Scopus database, a comprehensive academic source. The Scopus database possesses a wide range of multidisciplinary peer-reviewed research articles, books, conference and working papers, and it is used for several systematic review studies. Moreover, the Scopus database include a great number of journals on fashion, such as *Journal of Fashion Marketing and Management*, which need to be taken into consideration in the analysis, while focusing on peer-reviewed journal articles. The first step resulted in 98 publications.

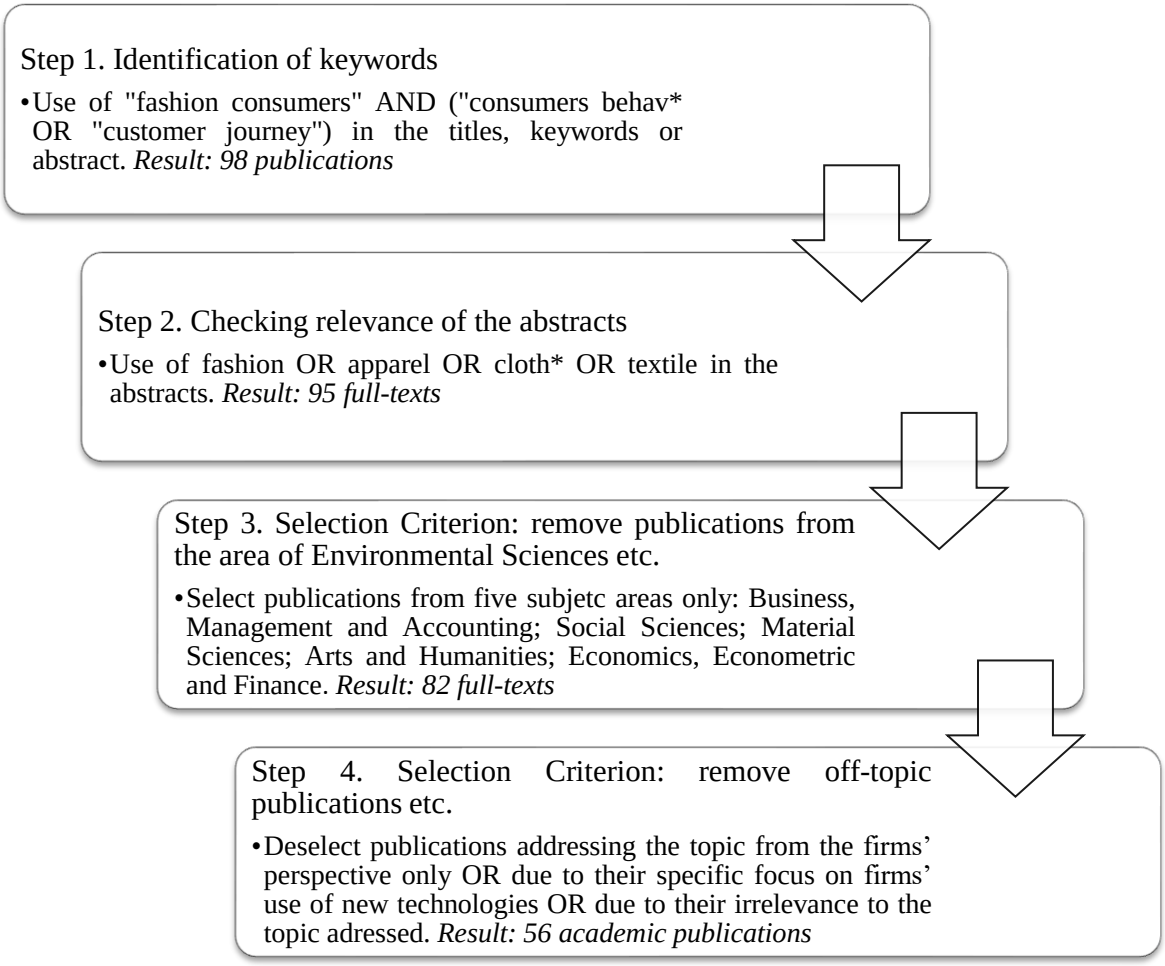
In the second step, the initial list was further refined by examining the relevance of the abstract within the fashion industry using specific keywords (fashion OR apparel OR cloth* OR textile), which made it possible to deselect publications that focused on other industries.

This phase resulted in 95 full-texts relevant to the fashion industry.

In the third step, publications from only five subject areas were selected: i) Business, Management and Accounting; ii) Social Sciences; iii) Material Sciences; iv) Arts and Humanities; and v) Economics, Econometric and Finance. This selection makes it possible to focus on research areas that deal with human behaviour without, however, considering articles that addresses the issue in the medical/psychological or biological/mathematical sciences. Accordingly, publications in the remaining research areas – Engineering, Computer Science, Environmental Science, Energy, Psychology, Medicine, Mathematics, Neuroscience, Agricultural and Biological Sciences, Multidisciplinary, and Physics and Astronomy – were removed. This phase resulted in 82 full-texts.

In the fourth step, the authors carefully read the selected 82 full-texts to ensure that the articles truly focused on consumers' behaviour within the fashion industry. Fifteen publications were removed because they address the topic of fashion consumer behaviour from the firms' perspective only, i.e. through data collection and analysis using qualitative and/or quantitative methodologies that aim to find out what executives and managers think about new fashion consumption patterns. Eight publications were removed due to their specific focus on firms' use of new technological tools to influence consumer purchasing behaviour, thus not considering behavioural aspects as exogenous variables. Three publications were removed due to their irrelevance to either the fashion industry or the selected subject areas. The final 56 academic publications – 50 articles, 4 book chapters, and 2 conference papers – were used to categorize and create the taxonomic scheme of this study.

Figure 1. Flow chart of the research process



3. Results

The content analysis wants to provide an overview of the topics covered by the literature on consumer behaviour within the fashion industry. The analysis follows the two-step approach initially theorized by Lincoln and Guba (1988), later revised from a marketing and management perspective by Yang et al. (2017). First, key topics were sorted into provisional themes based on look-alike characteristics. After that, the articles were further refined by these themes as the data analysis proceeded. The results indicated that the 56 academic publications could be categorized into six major content areas (Table 1): 1) Digital transformation and emerging trends in m-commerce; 2) Green branding, eco-labelling, and fair-trade labelling; 3) Offline vs. online fashion consumption; 4) Personal beliefs, fashion involvement, impulsivity, social and self-identity; 5) Quite luxury and cross-sexual fashion; and 6) Sustainability, second-hand-clothes, and recycling of end-of-life garments.

Table 1. Content Analysis Results of Topics of Research Articles

Content Areas	Publications
Area 1	Molina-Prados et al. (2022); Lyu et al. (2022); Tupikovskaja-Omovie and Tyler (2021); Konina et al. (2021); Sohn et al. (2021); Zafar and Sarwar (2021); Tupikovskaja-Omovie and Tyler (2020); Silva et al. (2020); Vazquez et al. (2020); Nash (2019); Guedes and Buest (2018); Tupikovskaja-Omovie et al. (2014)
Area 2	Blas Riesgo et al. (2023); Stringer et al. (2022); Heim (2022); Achabou (2020); Blechingberg-Kilpi and Grant (2020); Fu and Kim (2019); Beard (2008)
Area 3	Pang et al. (2022); Tupikovskaja-Omovie (2022); Tupikovskaja-Omovie and Tyler (2022); Lynch and Barnes (2020); Jocevski et al. (2019)
Area 4	Alanadoly and Salem (2022a); Alanadoly and Salem (2022b); Varma et al. (2022); Liu et al. (2021); Armstrong (2021); Khan et al. (2021); Zainudin et al. (2020); Jain (2020); Su and Tong (2020); Alosaimi et al. (2020); Gadhavi and Sahni (2020); Cook and Yurchisin (2017); Lee and Workman (2014); Edu et al. (2014)
Area 5	Almaguer Buentello et al. (2022); Makkar and Yap (2018)
Area 6	Rotimi et al. (2023); Galante Amaral and Spers (2022); McQueen et al. (2022); Pauluzzo and Mason (2022); Gheorghe and Matefi (2021); Popowska and Sinkiewicz (2021); Kovacs (2021); Sobuj et al. (2021); Ozdamar Ertekin et al. (2020); McNeill et al. (2020); Weber et al. (2017); Kong et al. (2016); Moon et al. (2013); Cervellon et al. (2012); Joy et al. (2012); Chan and Wong (2012)

Within areas 1), 2) and 6), the tendency of fashion retailers to adopt a new type of business model that incorporates some of the ongoing trends in the domain of consumer behaviour – reshaping not only the way in which the product is presented and made available to the end user but the very idea of fashion fruition – clearly emerges. The Fashion-as-a-Service (FaaS) model shifts the focus from product to consumer needs, paving the way for the clothing-as-a-service model.

3.1 The digital transformation

Digital transformation plays a primary role in redefining fashion consumer behaviour. The advent of smartphones continues to heavily alter online shopping experiences. In particular, we are witnessing a paradigm shift from the e-commerce model to m-commerce, where m stands for “mobile”. The m-commerce refers not only to retailer apps but to all possible customer points-of-contact on mobile devices, thus including social media within the framework.

With this in mind, Molina-Prados et al. (2022) analysed how fashion consumers behave when they make purchases using social media platforms. Whitin this online environment, customer brand engagement (CBE) seems to be strongly influenced by consumer brand involvement (CBI) and self-brand connection (SBC). However, CBI alone is not sufficient to stimulate a strong response in the domain of CBE, thus activating brand loyalty; a strongly connection with the favourite brand, in terms of personal beliefs and value, is mandatory to generate engagement and subsequent brand loyalty in an online environment. This is particularly true for Millennials and Gen Z, who first contributed to transform the classical e-commerce in m-commerce (Molina-Prados et al., 2022; Nash, 2019). Similarly, Nash (2019) states that fashion consumers use a variety of internal and external motivations that influence their behaviours and perceptions, and these factors are aided and facilitated by the ever-increasing use of social media. While recognizing that social media are not the only sources motivating fashion consumer shopping habits, there is no doubt that with the proliferation of active social media users, these platforms will continue to have an increasing impact on consumer decision-making in the coming years.

The development of m-commerce has brought with it the proliferation of mobile apps. Apps are now the preferred online channel of fashion consumers, especially in those countries where the acceptance rate of new technologies is very high, while websites seem to have taken a back seat (Lyu et al., 2022; Zafar and Sarwar, 2021). Nevertheless, despite the rapid adoption of digital channels among fashion consumers, their general attitude to both retailers' mobile apps and websites appears to be one of increasing dissatisfaction (Tupikovskaja-Omovie and Tyler, 2020). According to Tupikovskaja-Omovie et al. (2014) Gen X fashion consumers prefer to use websites on their mobile devices despite the wide range of mobile apps available – citing this very excessive availability as a problem – while Millennials and Gen Z believe that very often products are not displayed in the right way on apps, thus invalidating their online experience and preventing them from purchasing.

A further element of digital transformation lies in the possibility offered by new technologies to customize the product in a way never experienced before. Fashion consumers, looking for an ever-greater originality and uniqueness of the product, are starting to experiment with online stores that offer the possibility of customizing almost all the elements of a garment. This mass customization is made possible thanks to 3D printed fashion (3DPF) products, i.e. fashion products created using 3D printed technology (3DPT). These kinds of products are still novel to fashion consumers but could become a production standard in the near future, especially for all those consumers with a high level of new technologies acceptance. In fact, the results of the study conducted by Lyu et al. (2022) confirmed that innate and domain-specific innovativeness are critical antecedents of creating a positive attitude toward using 3DPF products through perceptions of 3DPT.

3.2 The rise of green branding

The green branding of companies is justified by the increasing interest of consumers in environmental issues. Specifically, fashion consumers are paying more and more attention to the sustainability of what they buy, focusing their attention on the presence of eco or fair-trade labels. However, it is interesting to note that consumers' general interest in these types of labels does not translate into a willingness to buy the product that is considered eco-friendly or produced according to fair-trade rules.

First, the purchase of this kind of product is highly discouraged if it is associated with a demand to pay a premium price that the consumer considers excessive, unnecessary, or simply cannot afford (Blas Riesgo et al. 2023). Thus, the premium price charged by companies is a highly discouraging variable, even for those consumers who define themselves, at least *a priori*, as being concerned about environmental issues and the labour exploitation of underdeveloped

countries (Fu and Kim, 2019). In particular, workers' welfare is often perceived as too emotionally distant to be considered an element capable of generating pro-social consumer behavioural change (Heim, 2022; Stringer et al. 2022). Indeed, in some cases modern slavery is seen as a necessary condition to ensure a high number of up-to-date collections according to the latest trends (Stringer et al. 2022). In this sense, variety appears to be a variable more capable of positively influencing the willingness to purchase than environmental and social variables (Beard, 2008; Fu and Kim, 2019).

Secondly, fashion consumers seem to have a general distrust of many of the companies' corporate social responsibility (CSR) campaigns. More specifically, CSR campaigns are often perceived as false and/or misleading by consumers, even if this is not true. In fact, what emerges is a general incapacity of fashion consumers to judge the real ethical and social commitment of firms (Achabou, 2020). Consumers complain about the lack of transparency regarding the supply chains and working conditions of upstream companies but, at the same time, they are unable to judge whether the claims of a fashion company regarding its environmental and social commitment correspond to the truth (Blechingberg-Kilp and Grant, 2020). Therefore, there is a paradox whereby the interest in green branding does not go hand in hand with the ability of consumers to evaluate the effective "greenness" level of these policies, with the consequence that companies with greater availability of capital are able to make people perceive the message of an environmental and social commitment which, in practice, does not correspond to the truth (Achabou, 2020). At the same time, companies that actually engage with these issues risk not being perceived as equally green.

3.3 The sustainability of fashion

As awareness grows of the detrimental environmental impacts of the fashion industry, an increasing number of consumers are indicating a willingness to consume more sustainably. Part of sustainable clothing consumption includes extending clothing life through repair of worn or damaged garments, buying second-hand clothes, and recycling of end-of-life garments.

Second-hand clothes (SHC) emerge as an alternative for responsible consumption, towards sustainability, as a new opportunity for the fashion industry. When talking about SHC it is important not to confuse it with vintage fashion consumption. In fact, according to Cervellon et al. (2012) the main antecedents to vintage consumption are fashion involvement and nostalgia proneness as well as need for uniqueness through the mediation of treasure hunting. In contrast, second-hand consumption is directly driven by frugality. Eco-consciousness plays an indirect role through bargain hunting. The thrill of the hunt is present for vintage and for second-hand consumption; yet, while vintage consumers buy clothes for a unique piece with history, second-hand consumers are looking for a unique piece at a good price (Cervellon et al., 2012). The concept of SHC is often associated with that of renting out clothes or entire wardrobes, under payment of a subscription (Galante Amaral and Spers, 2022; McQueen et al., 2022). These two services, while trading in used – or reconditioned – clothes through rental contracts, build their business on the willingness of consumers to reduce their carbon footprint (Rotimi et al., 2023). Therefore, these kind of fashion consumers opt to rely on specialised companies that provide them with clothes for particular occasions or for an entire season, relieving them of the responsibility of necessarily having to buy garments.

Growing attention on the environmental and social impacts of the modern culture of consumption has highlighted garment disposal as a central area for concern (McNeill et al., 2020). According to Weber et al. (2017) consumers with a high fashion index – i.e. fashion consumers – and consumers with low fashion index – i.e. non-fashion consumers – manage their textile waste differently. While the majority of consumers donate and dispose of unwanted clothes, fashion consumers are more interested and likely to participate in alternative methods for removing unwanted textiles, such as resell, swap, and take back. As a consequence, although

fashion consumers produce more textile waste than non-fashion consumers, textile consumption cannot be directly equated with textile waste since fashion consumers were found to have a lower disposal rate than non-fashion consumers (McNeill et al., 2020; Weber et al., 2017).

More in general, the interest in sustainability of fashion consumers can be interpreted through six main variables (Sobuj et al., 2021): i) consumer attitude; ii) subjective norm; iii) perceived behavioural control; iv) environmental concern; v) environmental knowledge; and vi) purchase intention. According to this model, purchase intention is significantly influenced by attitudes, subjective norms, environmental concern, and environmental knowledge of consumers. In particular, subjective norms and environmental knowledge were found to be highly influential to eco-friendly apparel purchase patterns among young consumers (Sobuj et al., 2021). However, these variables are not always an accurate predictor to measure actual purchase behaviour for sustainable fashion products. In fact, although fashion consumers believe they are fully aware of the different environmental problems affecting society, their environmental attitudes do not always translate into practice, especially among Millennials (Pauluzzo and Mason, 2022). Consumers' purchasing choices seem to be determined by the price and by the communication strategies of fashion retailers rather than on the garment's ecological characteristics.

Price is an essential component, as consumers do not seem to be happy with having to pay a premium price in order to enjoy a certain level of eco-fashion (Chan and Wong, 2012). On the contrary, eco-sustainable fashion products seem to be compared to luxury clothes, highlighting a profound dissonance between environmental concerns and best practices of ecological behaviour (Joy et al., 2012; Ozdamar Ertekin et al., 2020).

The communication strategies of fashion companies do not help resolve this dissonance, but rather contribute to fuelling a general confusion between the different concepts of sustainability such as "organic", "fair-trade", and "carbon emissions" (Popowska and Sinkiewicz, 2021).

4. A new business model for the fashion industry

It is clear from the above areas that a new type of business model is emerging within the fashion industry called Fashion-as-a-Service (FaaS), i.e. a novel business model that aims to provide fashion consumers with convenient and sustainable access to a wide range of garment options. Companies adopting the FaaS business model tend to exploit digital technologies to offer personalised fashion recommendations, giving consumers access to the latest trends and styles without the need to buy them (Black et al., 2019). The FaaS model encompasses various types of services such as subscription-based wardrobe, clothing rental platforms and customised styling experiences (Galante Amaral and Spers, 2022; McQueen et al., 2022). The access to these innovative services is facilitated by the ongoing digital transformation. This transformation, on the one side, allows consumers to access products and services from the comfort of their mobile device (Molina-Prados et al., 2022; Nash, 2019) and companies, on the other side, to boast an incredible number of touch points with their customers, improving the level of engagement and, as a result, brand loyalty (Molina-Prados et al., 2022).

Subscription-based wardrobe services represent one of the key services of the FaaS model. The emergence of these services fits perfectly within the recent consumer trend of seeking increasingly environmentally sustainable products (McNeill et al., 2020; Weber et al., 2017) and allow customers to pay a monthly fee in exchange for a rotating selection of clothes. This model allows them to experiment with different styles, adapt to changing trends and have an ever-changing wardrobe, while reducing clutter and waste. In fact, subscription wardrobe services present themselves as the perfect combination of sustainability and product variability sought by consumers (Alanadoly and Salem, 2022a; Sobuj et al., 2021).

Another aspect of FaaS model is the rise of clothing rental platforms. These platforms offer consumers the possibility of renting clothes for a limited period of time. By renting instead of buying, consumers have the opportunity to be able to wear a garment, even a high-quality one, without being obliged to buy it. In fact, renting makes it possible to take advantage of bargain prices not comparable to those charged for a purchase (Maldini and Stappers, 2019). As in the case of subscription-based wardrobe services, this model also promotes a more sustainable approach to fashion consumption, above all by reducing the environmental impact associated not only with fast fashion but, more generally, with the overproduction of fashion products (Buzzo and Abreu, 2019).

The FaaS model also incorporates customised styling experiences, thanks to the possibility offered by new technologies to personalise the product. Modern fashion consumers, constantly looking for more and more product originality and uniqueness, are beginning to experience the convenience associated with online retailers that offer the possibility to personalise every element of a garment (Lyu et al., 2022). This personalised approach, supported by a wide range of technological tools – i.e. dedicated apps, and 3D configurators (Sharma et al., 2019) – improves the shopping experience, saving customers time and effort in their search for the perfect outfit. Furthermore, by offering a complete customisable product, FaaS promotes a sense of empowerment, guiding and encouraging consumers to discover their unique style and express themselves through fashion (Diddi and Yan, 2019).

The FaaS business model has a significant impact on both the fashion retailers and consumers. It promotes sustainability by reducing overconsumption and the environmental impact associated with garment production. By encouraging clothing rental and subscription services, FaaS companies contribute to a circular economy where clothes are reused, extending their lifespan, and minimizing garment disposal. Additionally, the concept of sharing resources and reducing individual ownership aligns with the principles of conscious consumerism and ethical fashion, in line with the trends emerged from the literature analysis (Athwal et al., 2019). In addition, FaaS model is able to democratise fashion, making garments accessible to a wider public that were historically limited to luxury fashion and those who could afford it. However, through rental services and subscription models, individuals from various socioeconomic backgrounds can experience the thrill of wearing designer pieces without the burden of ownership. According to Payne (2019) this “inclusivity model” promotes diversity and self-expression, fostering a more democratic and equitable fashion landscape.

Lastly, FaaS addresses the growing demand for convenience and flexibility in the modern world. With busy lifestyles and changing fashion trends, many individuals find it challenging to keep up with their evolving wardrobe needs. FaaS provides a solution by offering hassle-free access to a wide range of clothing options, ensuring that individuals can adapt to different occasions and express their personal style effortlessly.

5. Conclusion

The systematic literature review (SLR) provides a very broad picture of changing consumer behaviour within the fashion industry. In general, the digital transformation and polarization between online and offline channels seems set to play a major role in the near future, with the m-commerce model set to replace traditional e-commerce strategies. However, it is interesting to note that polarization does not seem to affect all fashion products equally. In fact, after a forced halt due to the pandemic, luxury products seem to be the prerogative of physical shops only, leaving mass brands to digital channels, apps in the lead; the latter now representing the preferred purchasing channel of Millennials and Gen Z.

Sustainability is the big driver within the industry. As consumer awareness of environmental issues grows, so will interest in more environmentally, ethically, and socially sustainable fashion consumption. Apart from phenomena such as the extension of the clothes'

lifetime and the preference to buy second-hand clothes, fashion consumers will pay increasing attention to the sustainability of brands. Not surprisingly, green branding - and more specifically eco-labelling and fair-trade labelling associated with many fashion brands - is a rising market trend. Little does it matter whether the consumer is actually able to understand the real environmental impact of companies. In this sense, the question arises as to whether the interest in these issues is comparable to a reverse greenwashing operation, given the proven lack of fashion consumers' ability to deeply understand environmental issues and the emotional distance to workers upstream in the industry's supply chain.

These emerging trends are clearly changing the business model of fashion companies, models that now seem to be evolving towards that of Fashion-as-a-Service (FaaS) in which the consumer, and not the product, is placed at the centre of the company's activities. In fact, fashion companies are starting to modify their business model on the basis of emerging trends in consumer habits, trends that show an increasing attention of fashion consumers to environmental issues. Consequently, it is logical to expect that the services provided by subscription-based wardrobe and clothing rental platforms will become more and more important in the years to come, along with all the customisation methods of garments currently available on the market.

In conclusion, it is evident that no specific universal behavioural model related to fashion consumers can be identified. On the contrary, trends and variables impacting on fashion purchasing behaviour are inherently characterized by a high variability. However, it is reasonable to assume that the macro-trends set out in this study (within the three thematic areas above analysed) are destined to develop further, perhaps declining in different nuances according to different markets, technological innovations and, consequently, new business models that these technologies will make possible to implement.

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