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The positioning dimensions of sustainable fashion brands

Perceptions from brands and consumers

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TABLE OF CONTENTS

INTRODUCTION **1**

LITERATURE REVIEW **3**

METHODOLOGY OF THE LITERATURE REVIEW 3

1. DIFFICULTY TO IDENTIFY SUSTAINABLE FASHION BRANDS 3
2. THE FASHION INDUSTRY 8

2.1 History of the fashion industry since the 1980's 8

2.2 Issues with the fashion industry 10

2.2.1 Environmental issues 10

2.2.2 Social issues 12

2.2.3 Other issues: consumer and animal well-being 14

2.3 Conclusion of the chapter 14

3. SUSTAINABLE FASHION 16

3.1 A growing interest for sustainable fashion 16

3.2 Definition of sustainability 17

3.2.1 Sustainability 17

3.2.2 A sustainable product 17

3.2.3 Sustainability in fashion 19

3.2.3.1 Business managers 19

3.2.3.2 Designers 20

3.2.4 Conclusion 23

3.3 Definition of sustainable fashion and slow fashion 24

3.3.1 Sustainable fashion, green fashion, eco fashion, ethical fashion 24

3.3.2 Slow fashion 26

3.3.3 Conclusion 27

3.4 Transparency and accountability 28

3.5 Conclusion of the chapter 30

4. POSITIONING OF SUSTAINABLE FASHION BRANDS 33

4.1 Definition of positioning and sustainable positioning 33

4.1.1 Positioning 33

4.1.2 Sustainable positioning 35

4.2 Conclusion of the chapter 38

5. CONCLUSION OF THE LITERATURE REVIEW 39

EMPIRICAL PART **41**

1. FIELD OF STUDY 41
2. GOAL OF THE EMPIRICAL PART 41

3. METHODOLOGY 42
3.1 Sample selection 42
3.1.1 Selection of brands 42
3.1.2 Selection of consumers 44
3.2 Data collection 45
3.3 Analysis method 46
4. RESULTS OF THE DATA ANALYSIS 50
4.1 Definition of sustainable fashion and characteristics of a sustainable fashion brand 50
4.1.1 Brands' point of view 50
4.1.2 Consumers' point of view 53
4.1.2.1 Definition of sustainable fashion 53
4.1.2.2 Characteristics of a sustainable fashion brand 55
4.2 Positioning dimensions of the brands interviewed 59
4.2.1 Description of the Positioning of the brands interviewed 59
4.2.2 Dimensions used in thepositioning of the brands interviewed 62
4.3 Positioning dimensions of sustainable fashion brands mentioned by respondents 63
4.3.1 Dimensions mentioned by brands when differentiating other sustainable fashion brands 63
4.3.2 Dimensions mentioned by consumers when differentiating sustainable fashion brands 64
5. DISCUSSION AND CONCLUSION OF THE EMPIRICAL RESEARCH 70
LIMITATIONS 76
CONCLUSION 76
BIBLIOGRAPHY 78

TABLE OF FIGURES

Figure 1 - Sustainable initiative transparency 4
Figure 2 – Life Cycle Thinking Assessment 18
Figure 3 - Characteristics of the general concept of sustainability, sustainable product, sustainability in fashion, sustainable fashion and slow fashion 30
Figure 4 - Sustainable fashion as defined in the scope of this research 32
Figure 5 – Pre-set list of codes for the definition of sustainable fashion and the characteristics of a sustainable fashion brand 47

Figure 6 – Overview of the coding of definition of sustainable fashion and characteristics of a sustainable fashion brand (consumers) from appendix 14 and 15 48

Figure 7 – Overview of the coding of the differentiation dimensions of sustainable fashion brands (used by brands and consumers) 49

INTRODUCTION

The market of sustainable fashion expanded these last years, with the rising awareness about the negative environmental and social impacts of the fashion industry. Indeed, the conventional production of clothes comes with environmental issues like resources depletion, carbon emissions, water and chemical pollution and waste, among others. Social issues such as unfair and unsafe working conditions are also present in the long and complex supply chains that often lack of transparency and traceability. Moreover, the current economic model of fast-fashion, overproduction and overconsumption led to a culture of "throwable clothes" that are easily disposed of. In response to these harmful practices, sustainable fashion brands aim to offer fashion that address these challenges. However, greenwashing (when brands try to appear more responsible than they actually are) creates confusion among consumers to identify truly sustainable brands. Moreover, the definition of sustainable fashion is not universal and brands vary in their level of commitments to sustainability. It is thus important for sustainable fashion brands to have a clear positioning. Therefore, this research aims to explore the definition of sustainable fashion and the characteristics of a sustainable fashion brand. Then, the positioning of sustainable fashion brands that have sustainability integrated in the core of their identity from the start is analysed. The goal is to investigate the differentiation dimensions used by sustainable fashion brands in their positioning. The consumers' point of view is also reviewed to discover on which aspects they perceive the different sustainable fashion brands. The results are obtained through semi-directive individual interviews with sustainable fashion brands and consumers.

Literature gap

The existing confusion among consumers to identify sustainable fashion brands has been documented by several authors (Beard, 2008; Kapitan et al., 2019; Furlow, 2010; Pickett-Baker and Ozaki, 2008). Many authors have focused on the definition of sustainable fashion (Beard, 2008; Joergens, 2006; Shen et al., 2013; Thomas, 2020) and slow fashion (Clark, 2008; Fletcher, 2010; Henninger et al., 2016; Jung & Jin, 2014; Muthu, 2017). However, there are fewer researches on sustainable positioning (Chang & Jai, 2015; Hartmann et al., 2005) and sustainable positioning strategies (Ginsberg and Bloom, 2014; Hartmann et al., 2005; Meyer, 2001). Moreover, studies on the components and positioning dimensions of sustainable

fashion brands are scarce. Kapitan, Kennedy & Berth (2019) researched the components of a sustainably superior positioning but it is not linked directly to fashion brands. Only Bandyopadhyay and Ray (2020) addressed specifically the sustainable fashion brands by drawing three components that should be addressed in their positioning. But no overview of the positioning dimensions used by sustainable fashion brands to position themselves and by consumers to differentiate the brands was found. Hence, my research aims to investigate these positioning dimensions.

Research questions

This work attempts to answer the following research questions:

- What is sustainable fashion? What is a sustainable fashion brand?
- What is the positioning of different sustainable fashion brands?
- On which aspects/dimensions do sustainable fashion brands position themselves on the market? On what aspects are they similar and on which aspects do they differ? What are their elements of differentiation and nuances?
- How do consumers differentiate the different brands of sustainable fashion? On which aspects/dimensions?
- From the brands and consumers' point of view, are there different types, categories of sustainable fashion brands? What are brands and consumers' perspectives of different sustainable fashion brands types/categories?

Originality and value of the research

Looking into the positioning aspects of sustainable fashion brands could help the brands in their strategy to better position themselves on the market of sustainable fashion and compare with their competitors. Potential opportunities to reach unserved consumers could be identified. Looking into the aspects/dimensions used by sustainable fashion brands to position themselves brings a better vision of the sustainable fashion market to brands to improve their positioning but also to consumers for their purchase decisions, to distinguish the several sustainable fashion brands on the market. Brands can understand how consumers perceive the positioning of sustainable fashion brands.

LITERATURE REVIEW

METHODOLOGY OF THE LITERATURE REVIEW

The literature review started by a browsing of general articles on sustainable marketing, then on articles more related to the fashion industry and its issues. After that, the reading was more related to sustainable fashion. Consequently, the issue concerning consumers' confusion about the identification of sustainable fashion brands was raised. The definitions of the different concepts of sustainable fashion were explored. Based on it, a definition of sustainable fashion was sketched out. Finally, the literature on the positioning, sustainable positioning and the positioning more specific to sustainable fashion brands was reviewed.

1. DIFFICULTY TO IDENTIFY SUSTAINABLE FASHION BRANDS

This chapter introduces the issue that sustainable fashion brands face: it is difficult to identify sustainable fashion brands, for several reasons that will be explained thereafter. Brands could tackle this issue by working on their positioning. The definition of positioning and sustainable fashion brands will be explained in the next chapters. Before that, we give some context to explain why it is relevant to study sustainable fashion brands' positioning.

The literature shows that there is a confusion among consumers and the different stakeholders to assess the sustainability of fashion brands (Beard, 2008; Kapitan et al., 2019; Furlow, 2010; Pickett-Baker and Ozaki, 2008).

Indeed, consumers may not have the knowledge, which is constantly evolving, to understand the various environmental issues and ethical information about the products (Furlow, 2010; Jordan et al., 2004). Moreover, they might not have the time to do research on the brands to assess their sustainability. Actually, there is no official and established "code of conduct" or governmental industry standards to evaluate the sustainability of companies in the fashion industry, thus the sustainability assessment of the brands relies on individual perceptions (Beard, 2008; Joergens, 2006).

Another reason to the confusion around the sustainability of fashion brands is the use of lots of vague words such as "eco-friendly", "green", "sustainable", "responsible", "ethical", "fair-

trade", "natural" etc. If used without relevant data and explanations about the materials and production process, they are meaningless and lead to confusion for the consumers (Fashion Transparency Index, 2020; Thomas, 2020; Yan, Hyllegard & Blaesi, 2012). This confusion increases with the lack of transparency and uneven communication of brands on their levels of sustainability and processes (Fashion Transparency Index, 2020; Haug & Busch, 2016). Indeed, all brands do not have the same degree of sustainable initiatives commitments and communication on sustainability. Baldassare and Campo (2016) show this difference of levels of sustainability and communication in their framework on sustainable initiative transparency. They differentiate companies based on two variables: the efforts of a company regarding sustainability compared to the level of communication on it. As a result, four categories of brands appear: dark companies (low commitment to sustainability and low-profile communication), opaque companies (low commitment to sustainability but high-profile communication), translucent companies (high commitment to sustainability but low communication-profile about it), and transparent companies (high commitment to sustainability and high profile-communication about it). Thus, it is difficult for consumers to evaluate which brands are sustainable or not because of the absence of communication of some firms although they have implemented sustainable practices (translucent companies) and because of the deceptive communication on sustainability of some brands which is inconsistent with their actual sustainable practices (opaque companies) (Furlow, 2010).

Figure 1 - Sustainable initiative transparency

		Appearing sustainable	
		Low-profile communication	**High-profile communication**
Being sustainable	**High commitment**	Translucent companies	Transparent companies
	Low commitment	Dark companies	Opaque companies

Source: based on Baldassarre & Campo's framework (2016).

Opaque companies' behaviour is called **greenwashing**. They appear more responsible than they actually are. These companies often use sustainability only for marketing purposes, without really incorporating the sustainability values and principles in their practices. The information is superficial and they do not really pursue the goal of sustainability by educating and involving their employees in this process (Baldassare & Campo, 2016). Terrachoice (2010) (as cited in Aji & Sutikno, 2015, pp. 436-437)[1] defines greenwashing as "the act of misleading consumers regarding the social or environmental practices of a company or the societal benefits of a product or service". Furlow (2010) specifies that it is "the dissemination of false or incomplete information by an organization to present an environmentally responsible public image" (In the early 1990s, para. 2). As a result, this creates doubts about corporate honesty and a decrease in customer's trust in the company's claims about sustainability (Davis, 1991; Furlow, 2010). In addition, the competitive advantage resulting from the sustainable aspect of the companies that are truly committed to sustainability might be diluted among the dishonest greenwashed sustainable claims (Furlow, 2010).

Therefore, to avoid confusion for buyers about the sustainability of a company, it is important for brands to **communicate clearly** on their sustainable practices and **have a clear sustainable positioning** for buyers who value sustainability in their purchasing (Kapitan & al, 2019). Thus, a brand should ensure that the product image reflects accurately its true content otherwise it could be accused of greenwashing. The claims should be honest, sincere and give a faithful image of the company's mission (Furlow, 2010). Beard (2008) even says that it is the responsibility of sustainable brands to give a clear and simple message without using a vocabulary too complex. This can be done through **sustainable marketing** practices (Simula & al, 2009). "Sustainability marketing acts as an instrument which aims to truthfully promote and inform stakeholders about the company's environmentally sustainable activities and shape their perceptions of sustainability" (Peattie & Charter, 2003, pp. 726–756). Companies can give a clear and transparent communication on the benefits of their sustainable products by working on their positioning (Bandyopadhyay & Ray, 2020).

[1] TerraChoice. (2010). The sins of greenwashing: Home and family edition 2010: A report on environmental claims made in the North American consumer market.

In addition to informing genuinely consumers about the brand's sustainable practices, it is important to increase the knowledge and awareness of consumers on the unethical practices of fashion and its consequences. Indeed, as pointed out previously, consumers struggle to find straightforward information and they lack knowledge about sustainability. Moreover, they will perceive the benefits of higher sustainable products and practices only if they are aware of the environmental and ethical issues surrounding their purchases (Charter et al., 2002; Ginsberg and Bloom, 2004). The media and NGO often perform this role of information (Haug & Busch, 2016). We can name, among others, organisations such as Fashion Revolution and their campaign "Who made my clothes?", the Clean Clothes Campaign and the Fair Wear Foundation which are working to improve working conditions of the textile industry.

Besides, according to Haug & Busch (2016), communication about the fashion industry issues such as the labour conditions and environmental impacts should not only be targeted to consumers but also to designers. Indeed, their lack of awareness about these problems might be an obstacle to fashion sustainability. They add that high fashion providers and the media are in the best position to make fashion more sustainable because the former define the fashion trends while the latter spread the trends to the world. Therefore, they have the power to make sustainable fashion fashionable and discourage unethical fashion.

Brands should thus ensure to have a clear positioning and branding, as well as educate consumers on sustainable fashion in order to encourage them to consider more sustainable alternatives to fast fashion (Mukendi, 2020)

Conclusion of the chapter

The goal of this chapter was to introduce the problem surrounding sustainable fashion brands: it is complicated to assess their various sustainability levels. For consumers, it can be a matter of time and a lack of knowledge, but from the brands' side, it is also due to the confusion coming from the use of vague "green" words and the lack of transparency on the production processes, leading to greenwashing. Brands should therefore communicate clearly on their sustainable initiatives and clarify their positioning regarding sustainability. The concept of positioning will be explained in a following chapter. There is also a lack of governmental or

official industry standards for sustainability. This issue can be improved by raising awareness about the fashion industry issues and by increasing transparency from the brands. For that, sustainable marketing and the involvement of the brands, designers, media and NGO's are needed. This issue is at the origin of the theme of this research to study the positioning of sustainable fashion brands.

2. THE FASHION INDUSTRY

Before introducing sustainable fashion brands, it is important to understand the industry in which they evolve and the issues rising from the current economic model. A brief history of the fashion industry from the 1980's will be presented to understand the evolution until today, followed by an overview of the environmental, social and well-being related issues emerging from the fashion industry.

2.1 HISTORY OF THE FASHION INDUSTRY SINCE THE 1980'S

The fashion apparel industry has known lots of changes over the last 30 years (Bhardwaj & Fairhurst, 2010).

In 1980, the industry was different from what we know today. It was defined by a **standardized mass production** with the forecasting of fashion trends. The mass production of standardized styles allowed cost savings. Indeed, the styles did not change frequently like nowadays because of design restrictions from the factories (Bhardwaj & Fairhurst, 2010). Consumer demand and fashion trends used to be forecasted by fashion retailers long before the garment was ready for consumption (Guercini 2001). The typical **4-stages life cycle** of fashion apparel consists in the introduction and adoption by fashion leaders, the growth and increase among the public that lead to mass conformity (maturation) and finally the decline and obsolescence of fashion. At that period, the collections were developed according to the timing of the fabric exhibitions, fashion shows and trade fairs, which resulted in **two seasonal collections**: Spring/Summer and Autumn/Winter (Bhardwaj & Fairhurst, 2010, p.167).

Soon, importations of fashion apparel started to increase (Bailey & Eicher, 1992) and the consumers became more fashion conscious (Bailey, 2001) and disinterested in the classic and simple standardized designs (Bhardwaj & Fairhurst, 2010). As a result, mark-downs in the market increased in order to sell fashion apparel during the forecasted season (OTA, 1987). In the late 1980's, the fashion market was characterized by the pressure on **low prices** and the **outsourcing to overseas factories**. Retailers started to work with suppliers and manufacturers around the world where labour costs were cheaper (Gereffi, 1999, p.43), which resulted in major cost advantages (Bhardwaj & Fairhurst, 2010). They needed to expand their product

ranges to offer the latest fashion trends and follow the responsiveness (quick response) of the industry (Barnes and Lea-Greenwood 2006; Hines, 2001; Hoffman 2007).

In the 90's, **fast fashion** was born. The concept is to replicate the designs seen on the fashion shows runways of high fashion designers in a very short time (only three to five weeks instead of the usual 6 month time) at low costs (Barnes and Lea-Greenwood, 2006; Haug & Busch, 2016; Joy et al., 2012). With fast-fashion retailers such as Zara, H&M, Mango and New Look, a new culture of '**throwaway'** clothes emerges which encourage disposability (Bhardwaj & Fairhurst, 2010; Fletcher, 2008). This trend of a continual renewal of products still continues until this day and that led to an increase of the number of **fashion seasons** (the length a collection stays in the stores). Three to five mid-seasons were added to the previous traditional two fashion seasons. Thus, the seasons and the product life-cycle are shortened (Thomas, 2020) as consumers are encouraged to buy more often (Bhardwaj & Fairhurst, 2010). This creates a lot of **pressure** for the suppliers who have to cope with the fast pace and high rate of product turnover to fill the orders (Thomas, 2020; Tyler, Heeley, and Bhamra, 2006). As a result, nowadays, the fashion market is very competitive, as retailers are trying to offer designs that are not found by their competitors (Bhardwaj & Fairhurst, 2010).

In summary, the fashion apparel industry shifted from forecasting future trends months in advance with a standardized mass production to fast fashion using real-time data to understand quickly the needs and desires of consumers with smaller quantities but with a far more frequent renewal of the collections and fast cycles (Christopher, Lowson, and Peck, 2004; Jackson, 2001; Joy et al., 2012). Fast fashion is thus characterized by low costs and prices, short production cycles achieved by flexibility in design and supply chain (transportation) (Bhardwaj & Fairhurst, 2010; Doyle, Moore, and Morgan, 2006; Haug & Busch, 2016; Skov, 2002). This results in a conception of '**fashion-as-consumption'** where continuous growth is promoted (Fletcher, 2016, p.59).

2.2 ISSUES WITH THE FASHION INDUSTRY

According to the United Nations, in 2019, the fashion industry was valued at around 2.5 trillion dollars and employed more than 75 million people (United Nations Economic Commission for Europe, 13 July 2018). The retail apparel market (excluding footwear and jewellery) accounts for 1.4 trillion dollars (Lissaman, 14 May 2018). The fashion industry generates several negative social and environmental impacts that hinder sustainability. We can name among others, the unfair working conditions, the overconsumption and excess use of limited resources, the pollution and waste from the production, contributing to global warming and climate change (Charter et al., 2002; Haug & Busch, 2016; Muthu, 2017). According to Thomas (2020, p. 737), from designer's point of view, these often result from a 'lack of awareness, involvement, and accountability across highly segmented, globalized and dispersed commodity chains.'

Compared to the food or cosmetics industry, the fashion industry was slower to address the environmental and social issues of the industry. It might be because the practices of the industry were not as much questioned as in other industries by the consumers (Beard, 2008) and that the effects to health are less noticeable and acknowledged than other industries (Petit, 2007). Then, what makes it more difficult is that the supply chain and production process are less transparent and more complex than in other sectors like food. Indeed, with the globalization, a single piece of clothing may be made of several different fabrics and components and go through multiple processes. The supply chain is thus highly fragmented (Beard, 2008; Fletcher, 2008).

2.2.1 ENVIRONMENTAL ISSUES

The environmental impacts of a garment occur at every stage of its life-cycle: how the fabrics are produced, sewn, the garment sold, used (laundering, drying), and disposed of (Laitala, 2018; Scaturro, 2008). The fashion industry is responsible for 10% of the global carbon emissions, which totals more than the combined amount generated by international flights and maritime shipping (UN Environment, 2019).

Resources on earth are limited and consuming more resources than what is available is an issue to sustainability. In the fashion industry, this involves the use of materials and production

of fabrics, as well as the large quantity of **energy** and **water** needed. The use of **chemicals** during the process as well as **pesticides** and **insecticides** to speed up the growing of fabrics disturbs the ecosystems and biodiversity and pollutes the environment, especially the water (Jung & Jin, 2014; Muthu, 2017; Scaturro, 2008). It is estimated that the fashion industry is responsible for 20% of global waste water (United Nations Economic Commission for Europe, 13 July 2018). In particular, the use of **conventional cotton** is an issue regarding these aspects. The production of cotton accounts for 4% of all world pesticides and 10% of insecticides (Common Objective, 1 February 2018) and requires large amount of water. Indeed, one kilogram of cotton textile requires 8.5 tonnes of water to produce it (Pfister et al, 2009). As water is also needed for other industries like the food industry, it becomes limited.

An alternative would be to use **synthetic fibres** like polyester but these are derived from fossil hydrocarbons and petroleum (non-renewable resources) and generate pollution and greenhouse gas emissions (Muthu, 2017; Scaturro, 2000). Yet, synthetic fibres were developed from the mid-twentieth century, for fear that natural fibres would not be sufficient to cope with the growth of population and demand of clothing (de Cizancourt & Segal, 1961-2). **Micro-plastics** and other water-proof chemicals released from synthetic clothes (like polyester, acrylic, polypropylene) during the laundry also damage the environment, water and threaten the marine life, which, in turn, has repercussions on human health (Common Objective, 1 February 2018; Eerkes-Medrano et al. 2015; Foster et al. 2012; Holmquist and al., 2016; Kant, 2012; Moorhouse & Moorhouse, 2017; Muthu, 2017). The release of synthetic microfibers is estimated at 500 000 tons per year (UN Environment, 2019).

Another problem is the **by-products** and **waste** generated by the **overproduction** and **hyper-consumption** (Haug & Busch, 2016). This damages ecosystems (Thomas, 2020; Scaturro, 2008). From 2000 to 2014, the production of clothing doubled and the purchase of clothing increased by 60%. However, the garments are kept half as long, with the lifetime of a piece of clothing in 2017 averaging at 3.3 years before being discarded (Common Objective, 1 February 2018). As seen in the previous section, the fashion industry is nowadays based on the concept of obsolescence in the sense that fashion products are often replaced by new ones due to **fast fashion** and the constantly changing fashion trends, with the acceleration of the fashion cycles (Abrahamson, 2011; Cline, 2012; O'Cass, 2004, Thomas, 2020). Moreover, the articles produced by fast-fashion are of lower quality (wear up to 10 times) compared to traditional

fashion apparels that focus more on quality and duration than quantity (Ghemawat and Nueno, 2006; Haug & Busch, 2016). Clothes are thus easily disposed of and are accumulated in landfills (Fletcher, 2008). Less than 1% of garments are recycled into new clothing each year (and 20% for textile) (Common Objective, 1 February 2018). The waste resulting from clothes that are not recycled or disposed of in landfills is estimated at 500 billion dollars every year (UN Environment, 2019).

To sum up, the negative environmental consequences of the fashion industry are related to resources depletion, energy consumption, carbon emissions, water pollution, biodiversity disturbance, chemicals pollution and waste.

2.2.2 SOCIAL ISSUES

The working conditions represent another major issue in the fashion industry. With the globalisation and the chase for low prices and low costs for garments (Jones et al., 2005), many companies have outsourced their production to developing countries where labour is cheaper. This has been criticized because while large companies make big profits, workers often receive **low wages** (Ertekin & Atik, 2015). There is a difference between the minimal wage (the legal minimum wage in the country) and the living wage. A **living wage** is a wage that allows workers to live out of poverty and afford a decent standard of living. That means having enough money to pay for food, healthcare, clothing, transportation, energy, water, childcare, education and enough savings for unexpected events or emergency (Oxfam Australia, 2017). However, there is a problem if the minimum wage is below the living wage. Countries where garment factories are present often set the minimum wage too low to ensure competitiveness and attract foreign investment. For example, in Bangladesh, Vietnam and Indonesia, the usual wages only amount for 25% to 50% of the living wage (Oxfam Australia, 2017).

Because of the low wages, many workers work **excessive hours** to earn enough money to live. Last-minute order changes from fashion brands and short fashion cycles also create **pressure** to complete the orders in time (Common Objective, 1 February 2018). This issue also leads to an **instability of employment** contracts and insecure jobs as the number of workers needed

vary with the orders of fast fashion brands and the time constraints to complete the orders (Ertekin & Atik, 2015). The poor working conditions of garment workers are often found in **sweatshops**. These are "workplaces with unacceptable working conditions" (Wilson, 2003, pp.68–90).

The workers' **health** and **well-being** are also affected because of overtime, lack of sanitary facilities, excessive noise and heat, and exposition to **hazardous chemicals** during fabrics harvesting, spinning and dyeing. The lack of **safety equipment** and compliance with building safety regulations creates unsafe working conditions (Common Objective, 1 February 2018). A striking reflection of this problematic can be found in the disaster of the **Rana Plaza**, a garment factory in Bangladesh that collapsed in 2013 and killed more than a thousand of workers (International Labour Organization, s.d.). Cracks in the wall had been reported the day before the accident but workers were told to go to work despite that (BBC News, 2013). This catastrophe also brought to light the **transparency issue** about the fashion supply chain. As retailers work with a multitude of buyers, contractors and subcontractors which are spread around the globe in a globalized world, this makes the **supply chain long and complex**. Hence, there is a difficulty for brands to trace exactly their whole supply chain and know the precise locations of all the places where their garments are produced (Muthu, 2017, p.3). As a consequence, the stakeholders of the fashion industry are accused of failing to take their ethical responsibility towards the current generation (the third world workers) and the future generation (who might suffer from the current unsustainable production) (Haug & Busch, 2016).

This example also shows the insufficient **labour representation**. Hence, other issues are present like **gender discrimination, harassment, labour exploitation, modern slavery** and **child labour** (Common Objective, 22 November 2017 & 1 February 2018; Muthu, 2017, p.3). Then, according to Labour Behind the Label (s.d.), 80% of garment workers are women aged 18-35. Attention should also be paid to female workers' rights during pregnancy and maternity (Common Objective, 1 February 2018).

In summary, the social issues of the fashion industry are related to the workers' health and wellbeing depending on the access to safe and fair working conditions.

2.2.3 OTHER ISSUES: CONSUMER AND ANIMAL WELL-BEING

Other negative impacts that are less highlighted are the ones related to the consumer wellbeing (Haug & Busch, 2016). It can be of physical nature: chemicals found in some fabrics can harm the body because they are a source of **hormones disruption** and potential cancer, some tight shapes of clothing can create discomfort, etc. (Anderson, 2013). Then, it can also be of psychological nature: the beauty standards, distorted representations of idealized gender and body images carried out by the fashion industry can impact the way one feels about himself/herself, its self-esteem and lead to unhappiness (Skov, 2010; Ertekin & Atik, 2015).

In addition, **animal welfare** is also problematic in the fashion industry (Skov, 2010). The toxic dyes and microfibres ending up in the oceans are harmful to marine life (Rauturier - Good on you, 10 May 2020). Then, the production of **leather** for instance presents several issues: the chemicals used to tan are toxic for the environment (air, soil, water) and the workers (skin diseases and respiratory illnesses) (Rauturier, 2017). Cattle, goats, sheeps and many other animals are killed for their skin (even when they are just new-born) and suffer from cruel practices. They live in poor conditions and go through some painful procedures such as castration, dehorning and mulesing, along with the slaughter itself, that causes stress. Often, the skin of the animal is valued as much as its meat, hence leather is not always a mere “by-product” or waste of the meat industry as animals are raised for their skin (Animal Australia, 2020). The use of other animal fabrics like fur, wool, angora, silk, feathers are also at risk (Rauturier, 2020).

2.3 CONCLUSION OF THE CHAPTER

The fashion industry shifted from standardized clothes in the 80’s to today’s fast-fashion leading to an overproduction and overconsumption of cheap clothes with short life-cycle. Clothes lack of perceived value and quality and are thus seen as “throwable” and easily disposed of (Fletcher, 2010). As a result of this current economic growth model, the main environmental issues are the resources depletion, energy consumption, carbon emissions, water and chemical pollution, biodiversity disturbance and waste. As for the social impacts,

the unfair and unsafe working conditions are found in the low wages of garment workers, unstable employment contracts and lack of safety measures. With the globalisation of fast fashion, the suppliers and subcontractors are under great pressure to meet the order fulfilment in time and cost, which creates pressure and overtime work. The lack of labour representation is another big issue. Lastly, the consumer and animal well-being are also problematic. All these issues represent challenges for sustainability and are addressed in the scope of sustainable fashion.

3. SUSTAINABLE FASHION

As a response to the issues of the fashion industry, the concept of sustainable fashion emerged. But what is sustainable fashion exactly? This chapter begins with an introduction to the growing interest for sustainable fashion, then the definition of sustainability in general is presented, followed by the explanation of a sustainable product and an outline of business managers and designers' vision of sustainability in fashion. After that, the concepts of sustainable fashion, slow fashion and its nuances are discussed.

3.1 A GROWING INTEREST FOR SUSTAINABLE FASHION

In the last few years, awareness and knowledge increased about the environmental and ethical costs of fashion (Chang & Jai, 2015; Thomas, 2020). Consumers became more interested in sustainability and concerned about the impacts of their consumption (Beard, 2008; Ha-Brookshire and Norum, 2011; Haug & Busch, 2016). The focus shifted from consumerism to one's contribution and impacts on society, for example by choosing products minimizing waste or supporting local producers (Beard, 2008). As a result, consumers want more traceability, authenticity and quality, eco-friendly processes, good working conditions and a responsible supply chain for the products they buy (Gordon, Carrigan & Hastings, 2011; Pookulangara & Shephard, 2013). Designers, as well, focus on the environmental and social aspects of the fashion sourcing, design and production (Thomas, 2020). Beard (2008) reckons that a niche market for ecofashion started to develop in 2006-2008, with the promotion of fair trade, organic cotton and recycled clothing.

However, at that time, the clothes on the sustainable fashion market were more expensive and although they were addressing sustainability, the few sustainable fashion brands on the market were struggling to bring out the fashion dimension of clothing: offer an attractive design and stylish look while being sustainable (Bandyopadhyay & Ray, 2020; Beard, 2008; Haug and Busch, 2016). Since then, new brands have appeared offering more diverse styles. But the market of sustainable fashion is still considered a niche market (Mukendi et al., 2020). In the UK (one of the top 10 fashion market), less than 1% of the retail offering in 2017 was promoted as sustainably or ethically produced (Lissaman, 2018).

3.2 DEFINITION OF SUSTAINABILITY

3.2.1 SUSTAINABILITY

To understand what sustainable fashion is, we should first define the concept of sustainability.

Sustainability is the ability to "meet the needs of the present without compromising the ability of future generations to meet their own needs" (United Nations, 1987, p. 41). It encompasses 3 spheres (Remmen et al., 2007 ; Langenwater, 2009, p.11) :

- Social: respect for people at all levels, from the communities to the supply chain workers;
- Environmental: respect for the planet and acknowledgement of its limited resources;
- Economic: making profit in the respect of these principles.

It can be achieved through responsible practices that account for all the stakeholders in the value chain from workers to consumers, and bring value to them, while preserving the environment for futures generations and make the company more productive and viable (Beard, 2008; UDSAI, 2009).

The idea is to reduce the resources used while making the best use of the ones available. This is the concept of **eco-efficiency** (Cooper, 2005). Shifting from a linear economy to a circular economy goes further by reducing the amount of raw materials and waste (Cooper, 1994, p.2).

3.2.2 A SUSTAINABLE PRODUCT

To be sustainable, fashion should deliver a sustainable product. According to Fuller (1999) and Charter et al. (2002), sustainable products are products that have positive ecological attributes that improve waste management, energy and resources efficiency and reduce packaging throughout their life cycle. These positive impacts are found in the materials used (renewable and sourced locally to minimize transport costs), the production process, the functioning of the product, its durability in use and time (easily repairable, designed to last, re-usable and recyclable) but also in the way it is distributed and disposed of at the end of its life.

The consideration of each stage of the product life is resumed in the concept of **life-cycle thinking**. Life-cycle thinking is an approach to sustainable development that considers the product from its environmental, social and economic impacts (such as resources consumption, emissions and waste) over its entire life cycle: from the raw materials extraction (including transportation and processing) to the design and manufacturing, packaging and distribution, use and maintenance, disposal and recycling (Cooper, 2005; Remmen et al, 2007). The brand's sustainable activities should take into account how the product is made, distributed, sold, maintained, and repaired, as well as the packaging used and the manufacturer's level of resource efficiency for the creation of the product (Kapitan & al, 2019). Life-cycle thinking tackles the difficulty to trace long supply chains by assessing the entire life cycle of a product and give information on the impacts at each stage of the process (Muthu, 2017, p.3). This way, it is possible to trace, reduce and delete the negative environmental and social impacts of a product based on a holistic approach (UNEP, 2003).

Figure 2 – Life Cycle Thinking Assessment

	LIFE CYCLE PHASE				
IMPACT CATEGORY	Raw materials acquisition[1]	Manufacturing	Distribution	Use	Disposal
Resource consumption[2]					
Air emissions					
Water emissions					
Solid waste[3]					

Figure 2 Simplified LCA framework. [1]Including transportation and processing. [2]May be subdivided into energy and materials, or renewable and nonrenewable. [3]Industrial and postconsumer.

Source : retrieved from Cooper (2005), p.56.

Note : other categories (like the social impacts) can be added to the environmental ones displayed in the first column in this figure.

Indeed, a sustainable product should not be harmful to human health, not pollutant and not contain hazardous substances. Moreover, tests on animals, child labour or forced labour in the whole supply chain are banned (Charter et al., 2002). However, the product performance and quality should not be put aside despite the sustainable attributes of the product. The

green benefits alone will not be enough for the consumer to purchase the product if these core characteristics are not present (Ginsberg and Bloom, 2004; Ottman, 2011).

A sustainable product thus takes into account the environmental, social and ethical impacts at every stage according to the life-cycle thinking approach. Tools like the Higg Index (Sustainable Apparel Coalition, n.d.) can help brands to assess their sustainability regarding their environmental and social impacts.

3.2.3 SUSTAINABILITY IN FASHION

The perception of sustainability in fashion varies a lot as each stakeholder has a different view to address the ethical and environmental issues depending on their role in the fashion industry (Haug & Busch, 2016). It is the case for business managers and designers. Thomas (2020) explored their conceptions of sustainability in fashion.

3.2.3.1 BUSINESS MANAGERS

From fashion business managers' point of view, sustainability involves a reduction of the environmental impacts in the long-term to fight climate change. It means finding a solution to the problem of **resources scarcity** by limiting the use of energy, water, packaging, waste and improving the resources and production. This perspective echoes with the definition of a sustainable product as seen previously. But for them, sustainability also means continuous financial growth and profitability, which can be reached by these cost-saving environmental efforts. They mention the need of a measurement system to improve **transparency** and **accountability** in the company and supply chain (Thomas, 2020).

To deal with the issue of resources scarcity, business managers think that sustainability implies a profound change in the fashion industry, with a focus more oriented towards **services** such as apparel **upcycling** which is the recycling of materials into products of equal or higher quality (Common Objective, 2018e), re-sales or personal services (Thomas, 2020). This calls upon the concept of **circular economy** which is based on the life-cycle thinking and cradle-to-cradle approach where the end-of-life of the product is considered (Thorisdottir & Johannsdottir, 2019). Circular economy is a system that aims to eliminate waste and pollution by keeping products and materials in use as long as possible (for example by reusing and recycling), and regenerate natural systems (Ellen MacArthur Foundation, n.d.). The raw materials thus remain

in a closed-loop manufacturing system as well as renewable energy (Brennan et al., 2015; Lissaman, 2019). The concept of circular economy can translate into brands taking back clothes to recycle them or offering repair services, but also a rethink of **ownership** with clothes renting, leasing or second-hand shops (Lissaman, 2019; Muthu, 2017, p.5). This way, the end of life of the garment is considered and offered a new life. It is especially important in fashion sustainability because the most negative impacts of fashion reside in the aftercare aspect of clothing (Fletcher, 2008). The offering of these services in addition to the product itself refers to the concept of **product-service system** (PSS). It is a set of products and services that fulfil a customer's need while having a lower environmental impact than traditional business models (Mont, 2002, p. 239). This creates new business growth opportunities which is in line with fashion business managers' vision of sustainability that encompasses long-term profit (Moorhouse & Moorhouse, 2017).

3.2.3.2 DESIGNERS

According to Haug & Busch (2016), designers have a certain responsibility to make fashion more sustainable. They are the ones able to choose the design, materials and production methods to limit the environmental and social damages, to make sure of the durability of the product and to design garments that are recyclable (Haug & Busch, 2016). Moreover, the design and production phases are of primordial importance in terms of sustainability because the decisions taken during these steps will determine the main environmental impacts of the product, and hence, its sustainable nature (Charter & al, 2002; Plepys, 2002).

For designers, sustainability is more about the making of the garment itself: choosing designs, fabrics, materials and production techniques that take into account the environmental and social impacts of the product (Thomas, 2020). When questioned about sustainable fashion, designers view the selection of durable and lasting **materials and fabrics** as one of its characteristics. The fabrics should be chosen with their environmental impacts in mind, whether it is their water usage or carbon footprint but also according to their long-lasting material quality. It can be for example recycled fabrics or lighter-weight materials that consume less fuel during transports (Thomas, 2020). Different tools have been developed to compare and rank the impacts of the different fibres. We can name among others, the 'Made-

By environmental benchmark for Fibres' (Appendix 1) and the 'Higg Materials Sustainability Index' (MSI) by the Sustainable Apparel Coalition which are the most widely used (Laitala, Klepp & Henry, 2018). The first one by Made-By presents 5 categories of fibres (from Class A to Class E). They rank the 28 most commonly used fabrics in the garment industry on 6 aspects: greenhouse gas emissions, human toxicity, eco-toxicity, energy, water and land (Common Objective, 2018d). Recycled fibres (such as recycled cotton, nylon and polyester), organic flax, hemp, cotton and Tencel are highly rated (Class A) while conventional cotton, wool are not recommended (Class E). The Higg Materials Sustainability Index assesses the materials based on 5 categories: global warming, eutrophication (nutrient pollution in water), water scarcity, fossil fuel depletion and chemistry (Sustainable Apparel Coalition, n.d.). It inspired other assessment tools like the Preferred Fiber and Material benchmark by Textile Exchange (Laitala et al., 2018).

These tools show that **organic cotton** is one of the preferred fabrics. As mentioned earlier, conventional cotton is really resources demanding while the production of organic cotton requires less resources inputs. Standards like the Global Organic Textile Standard (GOTS) help to certify the sustainability of cotton and enable transparency on the entire cotton production cycle (Scaturro, 2008). Nonetheless, there are doubts on the capacity of organic cotton farming to sustain the global demand of fibres. Organic cotton only represents 0,7% of worldwide cotton production (Textile Exchange, 2019). Thus, other fabrics are also used.

A critic of these tools is that they only take into account the environmental impacts during the production stage and not during the use of the clothing or disposal. As a result, the impacts of micro-plastics, the product lifespan and quality are omitted (Laitala et al., 2018). From a **waste** point of view, recycled fabrics tackle the issue of waste management as they are reused (Scaturro, 2008). Nevertheless, if several fabrics are mixed together (synthetic blended with natural or regenerated fibres), it makes the recycling and disposal more complex because the separation of the materials is more difficult (Scaturro, 2008). Natural fibres like linen, hemp and fibres derived from renewable resources (such as bamboo, seaweed, corn, soy, eucalyptus, milk and beech wood) are also better for disposal than synthetic fibres derived from non-renewable (petroleum) resources because of their biological derivation and compostable attribute. Thus, they do not remain forever in the environment as waste.

Besides the fabrics, the **design** is also an important aspect of sustainability in fashion for designers (Thomas, 2020). A product can be more sustainable if the design aims at reducing the resources used (raw materials, energy) and improving waste management (reducing hazardous materials and waste that end up in landfills, reusing and recycling waste following an endless loop) (Bhat, 1993; Fuller & Ottman, 2004; Ottman, 2011). Designers should design with zero or minimal waste without forgetting the end of life of the clothing (Moorhouse & Moorhouse, 2017). This is the idea of **eco-design**: "a design process that considers the environmental impact associated with a product throughout its entire life from raw materials through production and use to the end of its life" (Niinimäki, 2006, p.67). Then, designers view sustainability as a long-lasting and a personal relationship between the consumer and their clothes. They want to deepen this affective connection by designing something that consumers will keep longer and create an **emotional attachment**, as opposed to "throwaway fashion", to encourage slower fashion cycles (Thomas, 2020). Jung & Jin (2014) also agree that the designs and styles must be attractive but not rely on fashion trends so that the piece of clothing is kept as long as possible, as it does not become unfashionable. To sum up, the sustainable design philosophy's purpose is to avoid obsolescence by extending the garment lifespan (Fletcher, 2012). Several frameworks exist to guide fashion designers in sustainable fashion design. Kozlowski, Bardecki, & Searcy (2019) conducted a literature review of 12 tools and came up with 5 dimensions for sustainable fashion. In addition to the traditional environmental, social and economic aspects, they add an **aesthetic** and a **cultural dimension**. Aesthetic sustainability refers to a timeless and durable design to create a continuous attraction to the piece of clothing. Cultural sustainability involves a systems-level approach that considers the cultural context for the sustainable production and consumption. It takes into account the differences between the diverse cultural and values systems, norms, behaviours and ideas. It acknowledges the exploitation of labour and resources and the cultural colonialism. For example, the slow fashion movement encourages to extend the life of the garments. This involves a shift in culture that recognizes the intrinsic qualities and value of the garment itself (Kozlowski et al., 2019).

To encourage consumers to keep the clothes longer and create an "emphatic design", the brand can involve the customer in the production process (Jung & Jin, 2014) through **customization**, **co-creation** (the designer asks for the customer's opinion on the design) or

again product-service systems (design services like tailor-made pieces). The goal is to involve the consumer so that he forms a special bond with the garment to extend its lifespan (Niinimäki & Hassi, 2011).

3.2.4 CONCLUSION

These last years, the interest in sustainability raised. Consumers and designers became more aware of the negative impacts of the fashion industry and realised their responsibilities. As a result, sustainable fashion emerged. In this section, we focused on the general concept of sustainability. Sustainability means ensuring an environmental, social and economic durability. It calls upon the concept of eco-efficiency and circular economy to reduce the resources and waste while making the best use of the ones available. A sustainable product should consider the environmental and social impacts at every production stage, based on a life cycle thinking approach, while being performant.

In fashion, the concept of sustainability is understood differently depending on the stakeholder's position. Business managers see it as addressing the scarcity of resources and saving costs by reducing resources waste and offering services such as recycling or repairing at the end-of-life of the product. This also relates to the concept of circular economy as well as the PSS which questions the ownership of clothes through other business models like renting, leasing or second-hand clothes. Then, profitability is also part of their vision of sustainability. This requires measurement systems to improve transparency and accountability.

Designers, on the other hand, focus more on the garment specificities like the designs, fabrics and production methods to limit the negative impacts and the disposability. Fabrics, in particular, are to be chosen for their low environmental impacts and long-lasting qualities. Different tools exist to compare the materials' impacts. Concerning the design, the goal is to limit waste and obsolescence by creating an emotional attachment between the customer and the piece of clothing. Involving the customer in the design process or offering customization services encourages him to keep his garment longer. Sustainability also

integrate an aesthetic and cultural dimension. Both managers and designers see sustainability as efforts to extend the lifespan of the clothes.

3.3 DEFINITION OF SUSTAINABLE FASHION AND SLOW FASHION

After having outlined the general concept of sustainability, we can draw a definition of sustainable fashion, also often associated with “ethical fashion”, “eco-fashion”, “eco-friendly”, “fair trade”, “organic”, “natural”, “recycled”, etc. These kinds of words are used by brands in reference to the sustainable attributes of the products they offer. Hence, there is a confusion and misunderstanding about the meaning of these words and the actual sustainability they reflect (Beard, 2008). In this section, we explore the definitions of sustainable fashion and its synonyms as well as the slow fashion movement.

3.3.1 SUSTAINABLE FASHION, GREEN FASHION, ECO FASHION, ETHICAL FASHION

Sustainable fashion is part of the slow fashion movement and is synonym to green fashion, eco-fashion and ethical fashion (Joergens, 2006; Shen et al., 2013), although Mukendi et al. (2020) mention that these terms have different connotations.

Green fashion or **eco fashion** focus more on the environmental aspects of fashion with the use of eco-friendly materials (Carey & Cervellon, 2014).

Ethical fashion is about the people involved in the production process and their rights to good working conditions (Shen et al., 2013). It is ‘fashion with conscience’, on the design, sourcing and manufacture of clothing, based on fair trade principles, with the ban of sweatshops and the contribution to a sustainable business model in the country of origin (Joergens, 2006). But it is also a conscience for the environment by reducing the damages (such as water pollution and shortages, CO2 emission through the use of organic cotton for instance) (Haug & Busch, 2016; Joergens, 2006). It also calls upon the concept of diversity/inclusivity (the representation of diverse people all along the value chain, including the models in the advertisement), as well as animal welfare and vegan fashion (Rauturier - Good On You, 21 June

2020). In short, it is another word for “sustainable fashion”, although it might refer more to the “morally right” aspect about the people, planet and animals (Lang, 2020).

On the other hand, the definition of “**sustainable fashion”** is not universally established but it encompasses the two previous concepts (Joergens, 2006; Shen et al., 2013). Sustainable fashion aims at environmental sustainability by the use of renewable, organic or eco-friendly raw materials as well as a reduction of the carbon footprint and improvement of the durability (in time and use) of the product (Joergens, 2006; Shen et al., 2013). Then, it also addresses social sustainability by empowering the workers throughout the supply chain by providing them with fair wages, safe working conditions and labour rights (Pookulangara & Shepard 2013). Their benefits should exceed simple survival (UDSAI, 2009) which implies that they receive a living wage. Regular visits and audit of contracted factories are a way to monitor that workers benefit from their rights (Thomas, 2020).

After that, sustainable fashion often resonates with local production and sourcing (Henninger et al., 2016). **Transparency** and **traceability** are thus key in sustainable fashion to get information on the origins of materials and the production process, along with the building of strong long-term relationships with the supply chain partners (Henninger, et al., 2016; Jung & Jin, 2014). Shen et al. (2013) identified 5 criteria to sustainable fashion, which converge to the previous elements: a local production, an ethical production, the use of recycled materials but also organic and naturally processed, and finally products designed to last. They go further by linking sustainable fashion with the concepts of vintage (second hand or upcycled clothes) and **vegan** (no leather or materials from animals). Then, the definition given by Mukendi et al. (2020) encompasses a more global vision. According to them, sustainable fashion “includes the variety of means by which a fashion item or behaviour could be perceived to be more sustainable, including (but not limited to) environmental, social, slow fashion, reuse, recycling, cruelty free and anti-consumption and production practices.” (Mukendi et al., 2020, p.7).

However, some authors argue that there is a contradiction in the very concept of sustainable fashion (Clark, 2008; Henninger et al., 2016). Producing clothes creates carbon emissions. Thomas (2020) notices that there is a dilemma between sustainability and growth. A new company can start by producing low-volume of handcraft clothing made from found materials. But if they want to grow bigger and fill larger orders, there might be a dilemma to provide

sufficient materials and produce in large-scale. If the demand for sustainable fashion increases over time, the production of these clothes (and so their impacts) will increase as well and there is a risk that the model becomes close to fast fashion, based on consumerism. As a matter of fact, the most sustainable way would be to purchase no new clothes at all (Balsiger, 2014). Another alternative is **second-hand clothes** because their life cycle is extended while reducing the consumption of new clothes and allowing style versatility (Beard, 2008).

To sum up, sustainable fashion is a way to produce clothes that avoids damage to people, the planet and the animals (Lang, 2020).

3.3.2 SLOW FASHION

To mitigate the risk of consumerism, a sustainable movement emerged in the fashion industry: slow fashion (Jung & Jin, 2014). It includes the notions of “sustainable”, “eco”, “green” and “ethical” fashion (Ertekin & Atik, 2015). Clark (2008) defines slow fashion as an approach to sustainable fashion by adopting more sustainable and ethical ways to design, produce, consume, use and reuse. But the main idea that adds up to the definition of sustainable fashion as seen previously is that slow fashion involves taking the ‘time to produce, appreciate, and cultivate quality’ (Clark, 2008, p.429) and so, reducing and slowing down the production (number of seasons) and consumption by choosing quality over quantity, investing in fewer but higher quality pieces of clothing, as opposed to fast fashion (Ertekin & Atik, 2014; Fletcher, 2010; Jung & Jin, 2014; Muthu, 2017, p.5).

Besides, slow fashion is an invitation to move away from the mass-production and globalized fashion to instead build long-term and empowering relationships and trust with the partners at a smaller scale, to a more human dimension (Fletcher, 2010). Slow production means to achieve a slower speed that respects the environment (which allows raw materials to grow naturally) and people (no unhealthy pressure and workload to complete large orders) (Fletcher, 2007; Jung & Jin, 2014). Slow fashion relies on three main ideas (Clark, 2008). First, valuing the local resources and **distributed economies** to empower the workers (“think globally and act locally”): work with the **local culture, resources and communities** (craftmanship). This helps to sustain cultural practices and avoid standardization and the loss of hand skills, to instead create unique products and a “multi-local society”, a global network of local systems, thus a distributed economy. The local communities are not just mere

suppliers of raw materials (Domeisen, 2006). Thus, it empowers the local communities and challenge the traditional hierarchies of designer, producer and consumer (Clark, 2008; Jung & Jin, 2014). The second aspect is transparent production systems with less intermediation. The third aspect is sustainable and sensorial products for longer usable life (Clark, 2008). The style and design of the clothes are meant to last by wearing them frequently and in different ways (aesthetic longevity) (Fletcher, 2008; Jung & Jin, 2014). The design is less on the sign and image of the product but aims at giving more value to the tangible product itself (it is not a product just for rapid consumption). For that, **awareness** on how the product is made, from the raw materials to the final stage is necessary. The experience should not be limited to the consumption alone, but also acknowledges the deep value of the garment to create a strong bond with the consumer (Clark, 2008). It requires transparency on the origins and production conditions that ca not be hidden behind a mere designer or brand name (Clark, 2008). To achieve that slower pace, Pookulangara & Shephard (2013) notice the importance of educating consumers.

3.3.3 CONCLUSION

The concept of sustainable fashion is named under many words such as eco-fashion, green fashion, ethical fashion, etc. although there are some nuances. While eco-fashion and green fashion focuses more on the eco-friendly aspect of the clothes, ethical fashion is more about the “morality” of the practices. Sustainable fashion encompasses both by including a local production, an ethical production, the use of recycled, organic materials but also a design that is meant to last. Ensuring workers’ rights is also a component of sustainable fashion. Transparency and traceability are key. However, the very concept of sustainable fashion is a matter of debate because producing clothes creates environmental impacts and therefore this questions its sustainable nature. Second-hand clothes are thus also a form of sustainable fashion. Finally, slow fashion is a movement related to sustainable fashion which puts the emphasis on a slower and more human way of producing and consuming clothes. It encourages higher quality over quantity to ensure the durability in time of the clothes. It fights against the negative impacts of the standardisation and globalization of fast fashion by empowering local communities and resources with distributed economies. All these concepts involve the need of transparency and strong long-term relationships with the value chain partners.

3.4 TRANSPARENCY AND ACCOUNTABILITY

As seen earlier, transparency is an important concept for sustainability. Baldassare and Campo (2016) developed this concept of transparency as a "property of a communication relationship between a company and any stakeholders interested in staying informed about its sustainable activities" (p.422). Transparent companies establish an authentic communication on their sustainable practices by simply describing their true actions which are in line with their sustainable vision. Therefore, they do not only consider sustainability for communication purposes but really integrate it in their vision and genuinely work towards the achievement of it.

For them, transparency and sustainability go hand in hand. They illustrate it with the case of translucent companies as elaborated in their framework (mentioned in chapter 1). Translucent companies are similar to transparent companies because they also work to achieve sustainability. However, translucent companies do not communicate on their sustainable initiatives although they implement them. Because of that, translucent companies fail to inform their stakeholders on sustainability and therefore miss business opportunities (such as attracting new customers and investors), putting at risk the economic sustainability. Yet, we saw earlier in this chapter that the general definition of sustainability and business managers' perceptions of sustainability in fashion consider economic durability as part of the concept of sustainability. Hence, transparency is a characteristic of sustainability.

However, all transparent companies are not necessarily sustainable companies. According to Fashion Revolution (Fashion Transparency Index, 2020), being transparent does not necessarily mean being sustainable. Indeed, transparency is about disclosing information about the brand's policies, practices and supply chain. Thus, these actual practices can be either sustainable or not. Consumers can doubt the reliability of the brands' sustainable claims such as "fair trade", "organic", "sweatshop free", which do not always guarantee the sustainability of the production and fabrics (Beard, 2008; Thomas, 2020). Then, **labels** and **certifications** are a transparent way to check the reliability of these claims (Haug & Busch, 2016). The GOTS label was mentioned earlier regarding organic cotton but other labels also exist to certify the fair working conditions of workers such as the Fair Wear Foundation, Fairtrade or the SA8000 standard (The Good Goods, n.d.). However, smaller brands can

struggle to acquire labels because of a lack of financial means (Moon et al., 2015). In addition to the certifications, some rating **apps** were developed to assess fashion brands' sustainability like *Good on You* and *Clear Fashion*.

Thus, transparency allows the different stakeholders to have a clearer view on the situation to act and protect vulnerable people and the planet. By publishing information, brands create an inclusive system where the different stakeholders can participate (Fashion Transparency Index, 2020). For instance, information on the material sourcing and production process allows consumers to determine more easily which product is sustainable or not (Haug & Busch, 2016). Transparency gives access to information on the brands' practices and therefore, stakeholders can take their responsibilities and act in a more sustainable way (Fashion Transparency Index, 2020; Thomas, 2020). This leads to the concept of accountability. Baldassare & Campo mentioned the necessity of transparent companies to consider sustainability as their objective. To achieve that, all departments and employees need to contribute and share that common value of sustainability, where decisions are made in this pursuit. Involving all the stakeholders is important, for example, by training, educating and evaluating employees, suppliers and customers about sustainability or asking suppliers to have measurable goals and objectives to achieve environmental sustainability (UDSAI, 2009). So, **accountability** means that the company takes its responsibility toward society and acts responsibly in all its activities. For example, ensuring that human rights are respected by all their partners in all areas, monitoring the transportation emissions and pollution, ensuring an environmental-friendly production and focusing R&D towards sustainable technologies (Baldassare & Campo, 2016).

In conclusion, being a sustainable brand involves integrating sustainability in the company's vision, working genuinely to achieve that objective in the company's activities by engaging all the employees and stakeholders. A sustainable brand is also transparent by communicating on its sustainable initiatives (Baldassare & Campo, 2016). Labels, certifications and rating apps are a way to check brands' sustainable claims.

3.5 CONCLUSION OF THE CHAPTER

In this chapter, the concepts of sustainability, sustainable product, sustainability in fashion, sustainable fashion and slow fashion were reviewed.

The characteristics of each concept based on the above literature review are presented in the following figure.

Figure 3 - Characteristics of the general concept of sustainability, sustainable product, sustainability in fashion, sustainable fashion and slow fashion

Sustainability	Sustainable product	Sustainability in fashion	Sustainable fashion	Slow fashion
Environmental	• Limit energy, water, packaging, CO_2 emissions • Use local resources • Limit waste and no hazardous waste • No pollutant materials / low impacts materials and fabrics (recycled, organic, natural or renewable fibres)			
Social/ethical	• Human health • No forced or child labour • No test on animals		• Empower workers and communities ➢ Fair wages, safe working conditions and labour rights (no sweatshops) • Animal welfare, vegan • Diversity/inclusivity	• Empower local communities • Strong and long-term relationships with value chain partners
Economic		• Value profitability and growth ➢ Need of measurement systems • Presence of PSS concerning: ➢ End of life & circular economy: renting, leasing, second-hand ➢ Design: co-creation, customization		• Distributed economy
Aesthetic		• Design: no waste, emotional attachment, for a long-lasting relationship between clothes & consumers	• Timeless design, designed to last	• Design is less focused on sign and image but more on the inherent features of the garment itself
Cultural/ philosophy	• Performance and quality	• Avoid obsolescence, extend lifespan	• Anti-consumerism • (2nd hand clothes)	• Quality over quantity ➢ Slower cycles, smaller production scale • Step back from standardization and globalization • Integration of the local culture
		Life-cycle thinking, transparency, accountability, traceability, education		

Every characteristic is classified into one of the 5 dimensions of sustainable fashion according to Kozlowski et al. (2019): environmental, social, economic, aesthetic and cultural.

The concept of sustainability encompasses environmental, social and economic durability. A sustainable product should thus consider its impacts on these three aspects at each stage of its life-cycle. The vision of sustainability in fashion from fashion business managers and designers' perspectives according to Thomas's study focuses more on the economic aspects. They view sustainability as dealing with resources scarcity by limiting waste and working on the end of life of the product. This can be done through circular economy business models and services such as clothes repairing, recycling or renting. These business opportunities create profit which is also part of their vision of sustainability. Then, designers mention that it is also important to consider low environmental fabrics and materials and a design that triggers an emotional bond for the customer with his clothes, for example by co-creation or customization. Both are intended in an effort to expend the garment lifespan.

The definition of sustainable fashion is not universally established. While it is synonym to eco-fashion, green fashion and ethical fashion, there are some nuances. But sustainable fashion aims at reducing the negative environmental impacts while also taking into account the social impacts of the product, at every stage of the value chain, in addition to being profitable. Therefore, it involves the use of recycled, organic or low environmental impacts materials, an ethical production which ensures that workers' rights are respected. Some authors also include veganism as an aspect of sustainable fashion and an anti-consumerism philosophy. As a result, second-hand clothes are also part of sustainable fashion.

Slow fashion is a movement related to sustainable fashion which puts the emphasis on a slower and more human way of producing and consuming clothes, focusing on quality rather than quantity. It empowers the local communities and builds strong relationships with the value chain partners.

Moreover, these concepts all involve a life-cycle thinking approach, transparency, accountability, traceability and education of the different stakeholders on sustainable fashion.

The characteristics of these above concepts are summarized in the figure below to form the definition of sustainable fashion that will be referred to in the scope of this research.

Figure 4 - Sustainable fashion as defined in the scope of this research

Environmental	Social/ethical	Economic	Aesthetic	Cultural/philosophy
• Limit energy, water, packaging, CO_2 emissions • Use local resources • Limit waste and no hazardous waste • No pollutant materials • Materials/fabrics ➢ Low impacts materials, recycled, organic, natural or renewable fibres	• Empower workers and communities ➢ Fair wages, safe working conditions and labour rights (no sweatshops) ➢ No forced or child labour ➢ Strong and long-term relationships with value chain partners • Human health • Diversity/inclusivity • Animal welfare, no test on animals • Vegan	• Value profitability and growth ➢ Need of measurement systems • Presence of PSS concerning: ➢ End of life & circular economy: renting, leasing, second-hand ➢ Design: co-creation, customization • Distributed economy	• Timeless design • No waste design	• Avoid obsolescence, extend lifespan • Anti-consumerism • Quality over quatity ➢ Slower cycles, smaller scale production • Step back from standardization and globalization • Take into account the local culture

→ Life-cycle thinking, transparency, accountability, traceability, education

Source: literature review of chapter 3

Sustainable fashion as understood in the scope of this research encompasses these 5 dimensions.

4. POSITIONING OF SUSTAINABLE FASHION BRANDS

The focus of my thesis is on the positionings of sustainable fashion brands. The goal is to uncover the differentiation dimensions used by sustainable fashion brands to position themselves. The consumers' side is also explored by investigating the aspects they use to differentiate the different sustainable fashion brands. In this chapter, the general concept of positioning will be defined, followed by the explanation of a sustainable positioning. Then, the literature on the positioning strategies and components of a superior sustainable positioning is presented. After that, the literature related to the positioning in sustainable fashion is reviewed.

4.1 DEFINITION OF POSITIONING AND SUSTAINABLE POSITIONING

4.1.1 POSITIONING

Positioning is the place a brand occupies in the mind of its customers (Sorger, 2012). A brand's positioning is how customers think about a brand in a market and perceive its superiority (competitive advantage) compared to other brands in the same product category (Gwin & Gwin, 2003; Keller et al., 2002; Perreault & McCarthy, 1999). The analysis of a brand's positioning is part of the marketing strategy and is useful to determine how the brand is differentiated from other brands in the market, to spot the potential opportunities for new products, new customers or for a repositioning of the brand (Gwin & Gwin, 2003). The importance of positioning is explained in Saqib's article (2020). A clear positioning guides the marketing of the brand to highlight the right elements to differentiate from competitors, and increases purchase intention and positive brand image (Keller & Lehmann, 2006; Tudor & Negricea, 2012). It is especially important in a highly competitive industry like fashion (Shahid and Zafar, 2019).

To build the positioning of a brand, 4 elements need to be considered (Gwin & Gwin, 2003, p.31):

- The target market: the relevant group of customers.
- The aspects that make the brand/product different or superior to the competitors (this requires the knowledge of the brand's value proposition). These differentiation

aspects can come from tangible or intangible attributes (Gwin & Gwin, 2003). Examples of tangible differentiation attributes are the product design, the quality, the additional features, the packaging or the price, among others. But physical attributes can be easily imitated contrary to emotional and experiential aspects (which are intangible) (Hsieh, 2002; Mahajan & Wind, 2002). An example of intangible aspects can be the life-style image (Shahid & Zafar, 2019). These elements of differentiation constitute the brand's competitive advantage.

- How these aspects of differentiation are valued by the target market. The meaningfulness and relevance of a brand positioning is to be assessed in regards to what the target customers value (Gwin & Gwin, 2003).
- The ability to communicate these aspects of differentiation to the target market (Aaker, 1996; Gwin & Gwin, 2003, p.31). It allows brand implementation and success in the competitive environment (Kotler, 2000).

There are several methods to determine a brand's positioning: multidimensional scaling, factor analysis, discriminant analysis, and multi-attribute compositional models (Keon, 1983). The product attributes model (Lancaste, 1966, 1971) is another method that includes the price in the analysis of the positioning. Gwin and Gwin (2003) present in their research a comparative table of these different methods (Appendix 2), explaining their functioning, advantages, limitations and best use.

In the scope of my research, I'm focusing on the part prior to these quantitative analysis by conducting an exploratory research to investigate the elements of differentiation (positioning dimensions) of sustainable fashion brands.

Regarding the elements of differentiation, several authors have established typologies of positionings (positioning constructs). Blankson and Kalafatis (2004) conducted a literature review of the positioning typologies (Appendix 3). They found that the previous typologies were descriptive and did not take into account the consumer's perspectives although this is important for a successful positioning. So, they developed a positioning typology derived from consumers' perceptions of products and services featuring 8 distinct positioning dimensions: top of the range, service, value for money, reliability, attractiveness, country of origin, the brand name, and selectivity.

However, to my knowledge, no research has yet been conducted regarding the positioning dimensions of brands in the fashion market, although a more general study from Shahid and Zafar (2019) compared the effectiveness of three different brand positioning strategies for fashion retailers: benefit positioning, surrogate positioning and features positioning which are explained in Appendix 4. The benefit positioning is to communicate the advantages of the brand to show the personal value to the consumer, what the brand can do for them, in a problem-solution optic. In general, brands can be positioned based on their **functional attributes** or their **emotional benefits** (Aaker, 1996). The benefit positioning is an attribute-based approach. Then, the surrogate positioning is to create benefits related to external intangible aspects to the brand (for example, the brand allows to have a certain lifestyle). Lastly, the features positioning focuses merely on the concrete tangible attributes of the brand. The studies showed that positioning strategies based on **intangibles** aspects (surrogate and benefits) works better than **tangible** aspects (feature positioning).

4.1.2 SUSTAINABLE POSITIONING

We have discussed the general concept of positioning. In this section, the literature review on positioning is more focused on sustainability. Companies differ in the degree at which they use their sustainability aspects to position themselves (Du et al., 2007). Positioning a brand as sustainable in the advertisement allows to differentiate it from the competitors for environmentally conscious consumers (Chang & Jai, 2015; Hartmann et al., 2005). By adopting a **sustainable positioning**, companies include the dimensions of sustainability (economic, environmental or societal) into their business activities (World Commission on Environment and Development, 1987).

The sustainability message should be clear and transparent. Brands that position themselves as sustainable should be able to prove their claims about their sustainable initiatives, their sourcing and production processes and show their genuine commitment so that their sustainable claims are not perceived as simply serving marketing aims (greenwashing). It is worth noting that perceptions about sustainability can vary depending on buyers' level of knowledge and awareness of products and services' sustainability features (Kapitan & al, 2019).

Consumers choose eco-fashion products based on **sustainability-related** and **product-related attributes** (Bandyopadhyay & Ray, 2020). Meyer (2001) argues that products positioned only as “green” are not successful to drive sales but instead, they also need to be perceived with higher benefits other than just the sustainable attributes. For example, messages on sustainability are effective when the quality of clothing is also mentioned (Dickson, 2001; Gam et al., 2014). Ginsberg and Bloom (2004) also think that brands should first highlight the attributes of the product such as quality and performance, and then use the sustainability aspects to support the positioning.

Hence, Bandyopadhyay and Ray (2020, p.381) identify a “trade-off between sustainability aspects [environmental, social and ethical] and product-related aspects [like design and quality] in the promotion of eco-fashion brands”. They argue that both dimensions are to be balanced: sustainable fashion brands should first explain why sustainable products are better in terms of functionality and self-enhancement to create a feeling of “have-to-have-it”, before communicating on the green aspects. This links to the fact mentioned earlier that a sustainable product will not sell by its mere sustainable aspects but also need the core attributes of performance and quality (Ginsberg and Bloom, 2004).

Hartmann et al.’s opinion is similar (2005, p.11). According to them, the promotion of mere green functional attributes does not deliver individual benefits to the consumer. They insist on the necessity of highlighting emotional brand benefits. For example, the sustainable purchase can bring a feeling of well-being emerging from altruistic behaviours, contact with nature or personal satisfaction in showing the consumer’s environmental efforts. Nonetheless, there is no agreement on which positioning strategy (functional or emotional) is more effective. Instead, it seems that a combination of both is better (Hartmann et al., 2005).

Then, in their article, Kapitan, Kennedy & Berth (2019) research the factors that need to be addressed to create a **sustainably superior positioning** for B2B brands. Although the study is conducted on B2B brands, it is still interesting to have a look at the elements that make their positioning perceived superior by buyers in term of sustainability. First, brands should have **sustainability credibility** (such as compliance with international standards and environmental certifications, continuous independent audits on their sustainable activities, sustainable procurement policy and process, transparency). Then, they should take into account the

environmental impacts during their processes and activities (like the production outputs and inputs, the product lifecycle and the 3R Reduce, Re-use and Recycle). After that, they should also care for the different **stakeholders** involved in their activities (by supporting local communities, ensuring health and safety in the production facilities, working with supply chain members who share the same values). Next, attention to **resources** and **energy** efficiency should also be paid (monitoring energy consumption, using innovative technology to save energy, sourcing the resources locally). So far, these aspects are in accordance with the definition of sustainable fashion as seen earlier. Finally, the last factor that contribute to a sustainably superior positioning is the philosophy, that is the attitude of the company towards sustainability. They should adopt a **holistic philosophy**: consider the environmental, societal and economic dimensions of sustainability and implement sustainable processes. In short, being and acting sustainable, unlike other philosophies adopted by other companies which are sales focus, price focus or environmental marketing strategy (which is just focused on the communication about sustainability without necessarily reflecting the firm's actual sustainable practices). Compared to the four previous factors, this philosophy dimension is of greater influence on the perception of sustainably superiority**.** The philosophy of the company is what allows to distinguish the most the sustainability positioning among them. Ultimately, these five factors address the three aspects of sustainability (environment, economy and social). It is to note that this research by Kapitan & al (2019) was conducted for B2B brands (about the suppliers and buyers), so the results for B2C (for brands and consumers) might differ.

The literature on brand's positioning specifically related to sustainable fashion is scarce. However, Bandyopadhyay and Ray (2020) found 3 components that should be addressed by sustainable fashion brands in their positioning. First, the **authenticity** of the products and business processes (be true to their core values). This ties up with the sustainability credibility factor mentioned in the previous paragraph. Then, the traditional (usual) aspects of the **product** (quality, design) and finally, an **appealing sustainability-related backstory**. Brands should communicate on the reason why consumers should turn to sustainable fashion and how that action can impact their lives and others' (benefits positioning approach) rather than insisting on the negative impacts and difficulties of the fashion industry. This can be done by **storytelling** which involves rational and emotional elements. It is worth mentioning that the

positioning can evolve over time and be customized depending on the stakeholders (customers, employees, producers, investors) (Bandyopadhyay and Ray, 2020).

The **consumers' perspectives** are also explored in the scope of my thesis to discover how they differentiate the different sustainable fashion brands. Mukendi et al. (2020) segment sustainable fashion into two approaches: **pragmatic change** and **radical change**. Pragmatic change involves the use of mainstream retail and marketing methods that are already in use within the system, familiar language to spread sustainable fashion. For example, sustainable fashion brands like People Tree and Patagonia use the same marketing tools as non-sustainable brands such as physical stores, e-retailing and social media marketing. On the other hand, radical change implies a more transformative change that comes outside of existing practices and challenges the current system and consumerism ideology (Doherty et al., 2013). This can be done via an innovative business model, aiming at limiting consumption and focusing on the individual to bring a social change. For example, offering clothing repair workshops, renting, sharing swapping (Mukendi et al., 2020) or jeans leasing like Mud Jeans. It will be interesting to see if consumers also distinguish sustainable fashion brands based on these approaches.

Lastly, the distinction can be made between brands that integrate the sustainability aspect from the beginning, existing brands that try to improve their practices and procedures to be more sustainable (Beard, 2008) or brands that just add a sustainable product line to their existing non-sustainable collection (Bandyopadhyay & Ray, 2020; de Lenne & Vandenbosch, 2017). In the scope of my research, I chose to study the former ones: the fashion brands that have integrated sustainability in the core of their business and values from the start and consider sustainability as the main feature of their clothing. So the focus is on sustainable fashion brands that have sustainability as part of their positioning, and not fashion brands that might have some sustainable initiatives but don't use sustainability as a criteria in their positioning. Moreover, I decided to reduce the scope of my research to women ready-to-wear apparel (which excludes haute couture and accessories and footwear).

4.2 CONCLUSION OF THE CHAPTER

Positioning can be defined as the place a brand occupies in the mind of its customers. It is a strategic marketing tool to differentiate from competitors, especially in a competitive market like the fashion industry. A sustainable positioning is based on sustainability aspects of the brand. The scope of research of my thesis focuses on the qualitative phase preceding the quantitative step through an explorative study of the positioning dimensions used by sustainable fashion brands to position themselves. The literature on sustainable positioning shows that product-related (design, quality) and emotional benefits aspects work better than just sustainability-related aspect to position a sustainable brand and drive sales. Then, five factors were identified to create a sustainably superior positioning: sustainability credibility, concern for environmental impact, consideration of stakeholders, resource efficiency and a holistic philosophy (Kapitan et al, 2019). More specific to sustainable fashion, the literature on the brand positioning is scarce. However, a study from Bandyopadhyay and Ray (2020) identifies 3 aspects that need to be addressed in a sustainable fashion brand's positioning: products and practices authenticity, the traditional products aspects (design, quality) and an appealing sustainability-related backstory (storytelling). In the scope of my thesis, the consumers' point of view is also explored. Sustainable fashion brands can be distinguished whether they adopt a pragmatic or radical change approach to sustainability (Mukendi et al., 2020). This is a potential aspect on which consumers can distinguish the different sustainable fashion brands. Finally, the my research focuses on sustainable women ready-to-wear apparel brands that integrated sustainability in the core of their brand from the beginning.

5. CONCLUSION OF THE LITERATURE REVIEW

The literature review aimed to give an overview of the current problems facing the fashion industry, starting by a short history of the fashion industry to understand its evolution to its current state. The current model of economic growth causes several environmental, social, consumer and animal well-being related issues. As a way to deal with these issues, sustainable fashion emerged. However, there is a confusion among the different stakeholders and in particular for consumers, to define this concept of sustainable fashion and thus identify the sustainable fashion brands.

Hence, after a general research on the concept of sustainability and sustainable products, the views of sustainability in fashion were explored. The researches showed that sustainability is viewed differently depending on the stakeholder position. Based on Thomas's study (2020), we distinguished business managers and designers' points of view. Then, we focused more on the definitions of sustainable fashion and its synonyms (green fashion, eco-fashion, ethical fashion) suggested by various papers. It appeared that the definition of sustainable fashion is not universally established, some authors including more specific aspects that other did not (such as animal welfare or a timeless design). The literature also showed that sustainable fashion was also linked to a sustainable movement: slow fashion. Then, the notions of transparency and traceability appeared important in the understanding of sustainable fashion. Thus, the review of these different concepts allowed us to outline the main characteristics of sustainable fashion, which formed the definition of sustainable fashion as understood in the scope of this research.

In the last chapter, the concept of positioning was explained. It relates to the problem mentioned in the beginning that consumers have difficulties to identify sustainable fashion brands. Therefore, by working on their positioning, brands could help to address this issue. The literature on positioning, including the different positioning typologies was reviewed, followed by the concept of sustainable positioning. Several authors suggest that there is a trade-off between the positioning dimensions related to sustainability or the product. Finally, the papers on the positioning related specifically to sustainable fashion were explored. However, it appeared that they were scarce.

Ultimately, the literature review allowed us to comprehend the different concepts related to sustainable fashion and brand positioning. It guided our empirical part to collect data and study the positioning dimensions of sustainable fashion brands.

EMPIRICAL PART

1. FIELD OF STUDY

The choice of the subject of this thesis is inspired by the article of Kapitan et al. (2019) about the components of a sustainably superior positioning. As explained earlier in the literature review, they investigate the elements that make the positioning of brands perceived superior by buyers in term of sustainability. However, the study was conducting for B2B brands, not B2C and it does not address specifically fashion brands. It is thus interesting to study sustainable fashion brands' positioning by first researching the dimensions on which they position themselves. Moreover, the consumers' point of view is also explored to determine on which aspects they position sustainable fashion brands.

In the scope of my research, I chose to study fashion brands that have integrated sustainability in the core of their business and values from the start and that consider sustainability as the main feature of their clothing. So the focus is on sustainable fashion brands and not fashion brands doing sustainable actions. Moreover, the area of research was centred on women ready-to-wear apparel (which excludes haute couture and accessories and shoes).

2. GOAL OF THE EMPIRICAL PART

The aim of the empirical study is to bring additional elements of answers to the literature review regarding the following research question:

- What is sustainable fashion? What is a sustainable fashion brand?

And answer these research questions:

- What are the different positionings of sustainable fashion brands? On which aspects/dimensions do sustainable fashion brands position themselves on the market? On what aspects are they similar and on which aspects do they differ? What are their elements of differentiation and nuances?

- How do consumers differentiate the different brands of sustainable fashion? On which aspects/dimensions? What are the brands and consumers' perspectives on different sustainable fashion brands types/categories?

3. METHODOLOGY

As seen in the literature review, there are different quantitative methods to evaluate a brand's positioning. However, as the literature on the positioning dimensions of sustainable fashion brands is inexistent, it is not yet possible to conduct this quantitative study. Before that, these positioning dimensions first need to be discovered. That is the very subject of this thesis through a qualitative and interpretive empirical study exploring brands and consumers' opinions on sustainable fashion brands to uncover which aspects they use to differentiate sustainable fashion brands.

3.1 SAMPLE SELECTION

3.1.1 SELECTION OF BRANDS

Brands were sourced by browsing several websites, platforms[2], NGO's, articles[3] and e-shops related to sustainable fashion, like the Fair Wear Foundation[4], Common Objective[5] website, or sustainable fashion e-shop like We Dress Fair[6]. Brands mentioned by sustainable fashion bloggers were also explored like Alias Louise[7], Happy New Green[8], Livia Van Heerde[9] or bloggers featured on the platform "ethical influencers"[10], among others.

[2] For example, The Lemon Spoon: https://www.thelemonspoon.com/home/tag/Clothing
[3] For example, this article from the UN: https://www.unenvironment.org/news-and-stories/story/putting-brakes-fast-fashion
[4] https://www.fairwear.org/brands
[5] https://www.commonobjective.co/search/organisations?filters[profile_question_answers][]=80
[6] https://www.wedressfair.fr/marques
[7] https://aliaslouise.com/
[8] http://www.happynewgreen.com/annuaire-slow/vetements/
[9] https://liviavanheerde.com/all-included-brands/
[10] https://www.instagram.com/ethicalinfluencers/

As mentioned earlier, this study focuses on fashion brands that have integrated sustainability in the core of their business and values from the start and that consider sustainability as the main feature of their clothing. To check that, we visited the brands' website, looking for a mention of their sustainability approach in their presentation section or homepage. Moreover, the sample was limited to European sustainable fashion brands and ready-to-wear clothes (not haute couture) and not specialized clothing (such as special outdoor activities clothing), to avoid bias linked to the culture or category differences.

Then, brands were selected based on the definition of sustainable fashion as understood in the scope of this research, which was presented at the end of chapter 3 of the literature review (figure 4). We consider that sustainable fashion is constituted by these components. Thus, these characteristics were used as criteria selection for sustainable fashion brands. Logically, a sustainable fashion brand should thus match all of these criteria. However, this would be too restrictive as this definition is an ideal concept. That is why it was decided that these characteristics are sufficient conditions and not necessary conditions. That means that all characteristics do not have to be met for a brand to be considered as a sustainable fashion brand. Instead, we make the selection criteria less narrow by considering that if a brand meets at least one criterion of the environmental and one criterion of the social category, the brand can be qualified as a sustainable fashion brand in the scope of this study. We chose the environmental and social criteria because they appeared to be major aspects in the literature review regarding the definition of sustainable fashion (compared to the other economic, aesthetic and cultural categories). For instance, if a fashion brand sells clothes made from recycled fabrics (environmental category) and have a certification for fair working conditions (social category), the brand can qualify as a sustainable fashion brand in our sample selection (bearing in mind that the sustainable approach of the brand should be part of the "essence" of the brand). To check if the brands meet the criteria, a search for information on their production was conducted on each brand's website (often in the section "about us" or "sustainability"). Transparency from brand is therefore also necessary in the process.

In addition to these criteria, the brands selection was backed up with the app/website "**Good on You**" that rates fashion brands on their sustainability. A description of the Good On You app can be found on their website as followed:

"Good On You is an ethical rating system for fashion. We've done the research and spoken to the experts, the campaigners and the brands, to come up with simple ratings for how each label impacts these three key areas: people, planet, and animals. We score each brand on these issues and give an overall rating from 'We Avoid' and 'Not Good Enough', through 'It's A Start', to 'Good' and 'Great'". (Lang, 2020).

The rating of the available brands was checked. Only brands that were rated as 'Good' or 'Great' were considered.

In total, 27 brands were contacted. The analysis of these brands can be found in appendix 5. Among them, 5 gave a positive answer and were interviewed: Pool, Dedicated, Mud Jeans, Kuyichi and Nudie Jeans. The interviews were conducted between the 5 October and 4 November 2020 online via Google Meet or Zoom. The countries of origin of the brands are Belgium, Sweden and The Netherlands.

3.1.2 SELECTION OF CONSUMERS

The consumers sample was built with the goal of a diversified sample including different profiles of experts having knowledge (awareness) of sustainable fashion brands. The goal was to get their different perspectives on how they view sustainable fashion and differentiate sustainable fashion brands depending on their position/job related to sustainable fashion. Thus, in addition to "regular" sustainable fashion consumers, the sample also includes sustainable fashion bloggers, NGO's and platform/media related to sustainable fashion as well as managers/employees of multi-brands sustainable fashion e-shops, for their knowledge of sustainable fashion brands. Sustainable fashion bloggers were sourced from Instagram accounts such as @influence.for.food[11] and @ethicalinfluencers[12], among others. The sample was also limited to European respondents.

[11] https://www.instagram.com/influence.for.good
[12] https://www.instagram.com/ethicalinfluencers/

In total, 35 people were contacted and among them, 8 accepted the interview. The sample consists of 3 consumers/bloggers, 2 multi-brands sustainable fashion e-shops and 3 people working for an NGO or media platform related to sustainable fashion (Appendix 6). The countries of origins of the interviewees are: Belgium, France, The Netherlands and Austria. They were interviewed between 21 October and 20 November 2020.

For more simplicity, the respondents from this sample will be referred to as “the consumers” in the rest of the thesis.

3.2 DATA COLLECTION

The data was collected through individual semi-directive interviews. This type of interview allows respondents to talk freely about specific subjects and aspects determined by the interviewer prior to the interview. It facilitates the collection of the interviewees’ personal perceptions and opinions by giving more freedom than directive interview. For one of the brands (Mud Jeans), the data was collected during an online “questions and answers” session organised by the brand for several students. As a result, the information collected was not as developed as for the other individual interviews. Therefore, some additional information was also retrieved from their sustainability report[13] to complete the data from the collective interview.

The interviews were based on 2 interview guides (one for the brands and one for the consumers). They can be found in (Appendix 7). The questions aimed first to understand brands and consumers’ definition of sustainable fashion and the characteristics of a sustainable fashion brand in their opinion. Then, the interview guide for brands focused more on questions to understand their positioning and their differentiation aspects from other sustainable fashion brands. They were also asked what aspects they used to differentiate sustainable fashion brands and how they perceived the different categories of sustainable fashion brands. The interview guide for consumers explored as well the aspects they use to

[13] Mud Jeans. (2019). Sustainability Report 2019.pdf. Mud Jeans. https://www.dropbox.com/s/efusjjnizhmhrq7/Sustainability%20Report%202019.pdf?dl=0

differentiate sustainable fashion brands and categories of sustainable fashion brands. A Powerpoint was shown to consumers to support the discussion with images of fashion brands having sustainable initiatives (their logos, clothes and homepages).

The transcriptions of the interviews can be found in appendix 20 for the brands and appendix 21 for the consumers.

3.3 ANALYSIS METHOD

The analysis of the brands and consumers' point of view was conducted separately in the first place. For the brands, each interview was analysed in regard to three main themes: definition of sustainable fashion and the characteristics of a sustainable fashion brand (appendix 8), the aspects used in the brands' positioning (appendix 9), and finally, the aspects mentioned by them to differentiate other sustainable fashion brands (appendix 10). The data from consumers was analysed in a similar structure around two main themes: their definition of sustainable fashion and characteristics of a sustainable fashion brand (appendix 11) and the aspects they mentioned to differentiate sustainable fashion brands (appendix 12).

After that, the coding of data was done manually on Excel. For the definition of sustainable fashion and characteristics of a sustainable fashion brand, a pre-set list of codes was first drawn based on the literature review.

Figure 5 – Pre-set list of codes for the definition of sustainable fashion and the characteristics of a sustainable fashion brand

Codes pre-analysis definition of sustainable fashion and characteristics of a sustainable fashion brand base

Category	Theme	Sub-theme
Environment Energy and resources reduction/efficiency	Less negative impacts, attention to the environment	
	Local resources	
	Low impacts and no pollutant materials	Recycled materials Organic Natural
	Waste and hazardous waste reduction	
Social/ethic	Less negative impacts	
	Workers empowerment	Ethicaly produced, production ethics, consider the welfare of the workers, safe working conditions
		Fair wages
		Labour rights
	Communities empowerment	
	Long-term relationships with value chain partners	
	Human health	
	Diversity/inclusivity	
	Animal welfare	
		No test on animals
		Vegan
Economic	Services (PSS)	End of life (renting, leasing, second-hand, ...) Design (co-creation, customization, ...)
	Distributed economy	
	Measurement systems	
Aesthetic	Design	Timeless design
		No waste design
	Quality, long-lasting	
Cultural/philosophy	Avoid obsolescence, extend lifespan	
	Anti-consumerism	Avoid overproduction Avoid overconsumption
	Integration of the local culture	
	Life-cycle approach	
		Global approach, life-cycle thinking
		Consider the end of life
Transparency	Certifications	
	Give information	
	Traceability	

The codes were classified regarding the 5 dimensions of sustainable fashion mentioned in the literature review (Kozlowski et al., 2019): environmental, social, economic, aesthetic and cultural. An additional category for transparency was added as it did not fall into one of the 5 previous categories. This deductive coding was then completed with the new data found in the interviews. The appendix 13 presents the coding of definition of sustainable fashion and characteristics of a sustainable fashion brand according to the brands interviewed

For the consumers, the coding of their definition of sustainable fashion can be found in appendix 14 and the coding of their characteristics of a sustainable fashion brand are presented in appendix 15. The appendix 16 gathers the coding of consumers' definition of sustainable fashion and characteristics of a sustainable fashion brand.

Figure 6 – Overview of the coding of definition of sustainable fashion and characteristics of a sustainable fashion brand (consumers) from appendix 14 and 15

Coding consumers

Definition of sustainable fashion (consumers)

Category	Theme	Sub-theme
Environment	Less negative impacts, attention to the environment	
Energy and resources reduction/efficiency	Local resources	
	Low impacts and no pollutant materials	Materials used
		Recycled materials
		Organic
		Natural
		Dye used
	Waste and hazardous waste reduction	Waste reduction
		Chemicals
Social/ethic	Less negative impacts	
	Workers empowerment	Ethicaly produced, production ethics, consider the welfare of the workers, safe working conditions
		Fair wages, living wages
	Human health	
Economic	Services (PSS)	Design (co-creation, customization, …)
	Price	that reflects the true value of the clothes
Aesthetic	Design, style	Timeless design
		No waste design
		-Not just basics but a way of expression
	Quality, long-lasting	
Cultural		
Slow fashion	Anti-consumerism	Avoid overconsumption
	Acknowledge the true value of clothes	

Coding consumers

Characteristics of a sustainable fashion brand (consumers)

Category	Theme	Sub-theme
Environment		
Energy and resources reduction/efficiency	Low impacts and no pollutant materials	Existing materials, upcycling
Social/ethic	Communities empowerment	Employment creation
		Fair trade
		Craftmanship
		Social activities or supporting ngo
	Local production	
Economic	Services (PSS)	
		End of life (renting, leasing, second-hand, …)
	Distributed economy	Short supply chain
	Being independant	Not part of abig company holding
Aesthetic		
Cultural	Anti-consumerism	Avoid overproduction
	Integration of the local culture	
	Life-cycle approach	Global approach, life-cycle thinking
		Consider the end of life
Responsibility	Commitment of the brand to sustainability	From the start
	Purpose, raison d'être of the brand	
	Continuous improvement for sustainability	
Inform, raise awareness, educate	Raise awareness, conscientization	For a more sustainable consumption
Transparency	Certifications	
	Give information	
	Traceability	
Paradox of the concept of sustainable brands	It's not possible to be 100% sustainable	

Note: for more details, please refer to appendix 14 and 15

Then, the positioning of the brands interviewed was coded (appendix 17). Another coding was made for the dimensions mentioned by the brands when they differentiate other sustainable fashion brands (appendix 18). The aspects used by consumers to differentiate sustainable fashion brands was also coded (appendix 19). Below is an overview of the coding from appendix 18 and 19 (for more details, please refer to the appendix).

Figure 7 – Overview of the coding of the differentiation dimensions of sustainable fashion brands (used by brands and consumers)

Coding brands

Differentiation dimensions of sustainable fashion brands (brands)		
Category	**Theme**	**Sub-theme**
Product	**Category**	
	Style/design	Minimalistic "safe in design" More mature
	Collection	Limited number of collection
		Capsule collection
		Basics
	Quality	
Impacts	**Choice of one focus, different impacts**	
	Environmental friendly	Environment aspect in general
		Materials used
		Carbon footprint
		Production process
	Social/human aspect	Living wages
		Fair factories
		Employment creation
		Own factories
	Production technique, process	Craftmanship
	Economic	Price
		Business model: circularity
	Animal friendly	
Sustainability commitment	**Started sustainable from the begining or not**	Because integrated in the brand' values
		Pioneer
		Because of pressure and economic reasons
	Level of sustainability, do it right or not	
Transparency	**Level of transparency**	
Distribution		
Marketing and promotion		
Customer target		

Coding consumers

Differentiation dimensions of sustainable fashion brands (consumers)		
Category	**Theme**	**Sub-theme**
Product	**Design**	Style, designer's touch
	Fit (clothing)	For every body type
		Find the right piece of clothing
	Size	
	Quality	
	Collection	Limited number of collection or larger quantity (scale economy)
		Range of products: basics
Sustainability impacts chosen by brands	**Choice of one focus, different impacts**	Differences in the impacts chosen by the brand
	Environmental friendly	Materials used
		Waste management
		Chemicals
		Carbon footprint
	Social/human aspect	Fair factories
		Living wages, fair wages
		Own factories
	Communities empowerment	Support craftmanship, artisanal, indigenous people
		Employment creation
		Local production or abroad
		Social integration: produce clothes in prisons,
		Inclusivity
	Economic aspects	Price
		Business model
		Avoid overproduction
		No sales
	Animal friendly	

(Continued)

Category	Theme	Sub-theme
Role of the brand	**Reason of the brand creation**	
	Sustainability commitment	**Started sustainable from the begining or not**
		Level of sustainability, do it right or not
	Have an impact, change the industry	Avoid overconsumption
		Engage other brands to join the change toward sustainability
		-Activism, political lobbying -Have a bigger picture, larger scope than just the brand, drive change
	Educate, inform	-Inform the stakeholders, share knowledge -Conscientization of the customers, inform customers
Transparency and communication	**Level of transparency**	Details on product page
	Traceability	
	Certification	
	Open communication	Honest, answer questions, traceability
	Honesty on sustainability level	Admit that they are not perfect, know their next step for improvement >< brands that are 'satisfied' with their current state and don't talk about improvement
Distribution	**-No intermediary with the customer, sell directly to them**	
	-Via sustainable retailers or not; exclusive distribution or extanded distribution	
Marketing and promotion	**Brand image**	Visual identity
		-Reputation: Famous for their sustainability approach, strongly positioned, a reference for sustainable fashion
		Size of the company
		Communication (marketing) on sustainability
Customer target	Green consumers or not	

4. RESULTS OF THE DATA ANALYSIS

The analysis of the data collected through the interview is structured around three themes. First, we investigate the respondents' definition of sustainable fashion and the characteristics that they assign to a sustainable fashion brand. After that, we study the positioning of the sustainable fashion brands interviewed and the positioning dimensions used. Finally, we analyse the dimensions used by brands and consumers to differentiate sustainable fashion brands. In the conclusion, we use the results from the empirical study to answer the research questions by comparing the points of view of brands and consumers and we explain the contribution of our findings to the literature.

4.1 DEFINITION OF SUSTAINABLE FASHION AND CHARACTERISTICS OF A SUSTAINABLE FASHION BRAND

The results will be presented by distinguishing the brands and the consumers' point of view.

4.1.1 BRANDS' POINT OF VIEW

Brands were interviewed on their definition of sustainable fashion and the characteristics of a sustainable fashion brand. The elements they mentioned can be broken down into the following points (appendix 13):

<u>Consideration for the environment</u>

Sustainable fashion is *"something that can go on forever without depleting natural resources or adding to the climate crisis".* This definition given by one brand is supported by the idea of reducing the **carbon footprint** through the choice of a production location and local distribution. In addition, the residual CO2 emissions should be compensated. For brands, it ties with **low impacts materials** such as recycled fibres, organic cotton, natural fabrics. *"[We] developed from only organic focus to also […] recycled fibres, hemp, linen and even soy fibres and milk fibres*". Moreover, the notion of **waste** reduction is also included when one brand adds that it is also *"in terms of design and production, something where there is less waste".* These elements are in line with the literature review concerning the environmental category of sustainable fashion although they did not mention the local aspect of the resources.

Consideration for the people

For the brands, the people involved in the whole supply chain must be well-treated. Brands mostly include aspects related to workers empowerment: they particularly insist on fair wages. One brand talks about the **living wage**: *"make sure that workers are paid enough for them to afford food, housing, medicine and school, among other".* Then, brands refer to communities empowerment by bringing up a new element to the literature review: for them, creating jobs also contributes to **revitalize communities** in textile industrial pools and is also a component of a sustainable fashion brand. Furthermore, someone emphasises the importance of the **long-term relationships** of the brand with its suppliers and their shared vision of sustainability. This characteristic of strong relationships with partners reported in the literature is further developed by one interviewee who points out the **public recognition of the work of their suppliers** partners: "*I think that's really something that would show that we are a sustainable brand because we also give credits to our chain and we're really a brand that takes the innovation from the supplier and shows it to the markers*". However, our definition of sustainable fashion based on the literature features a consideration of labour rights, human health and diversity/inclusivity. These were not explicitly mentioned by brands. Then, concerning animal welfare, only one brand briefly alludes to it: "*I think the main three pillars [of sustainable fashion] are animal friendly, environmentally friendly and social friendly"*

Cultural dimensions

New elements in the cultural category of sustainable fashion are raised by the respondents. They are related to the brand's **commitments** to sustainability: the **pioneer** sustainable vision of the brand from the start, which is mentioned by a brand as they were among the first ones to use organic cotton. Then, the purpose of the brand to make a change, suggested by another brand by becoming more circular. Finally, a third brand points out the **inspirational** aspect of the brand to influence the industry and encourage a continuous improvement: *"look at how we can influence the fashion industry as a whole, […] see how we can get other brands to join us", "to inspire the industry and try to do it better season after season".*

Then, one interviewee refers to the anti-consumerism philosophy which was previously mentioned in the literature related to slow fashion and overproduction: *"take the time to consider the production, the choice of fabrics. Because now, everything goes fast, there are always new collections, new things in store, etc."* Thus for her, this involves a real **reflection** on the production process and slower cycles, as well as a questioning on the utility of the product, as opposed to the fast pace of the current fashion industry. The consideration of the local culture which was presented in the literature was not raised by brands.

Aesthetic dimension

Elements related to the aesthetic category were raised by a respondent, especially on the fashion aspect of sustainable fashion: *"we saw a need for responsible clothes that was cool"*, with **fashion appeal**, as *"fashion is a way of expression"*. One brand adds that the products should be of **good quality** and long-lasting.

Transparency

After that, brands talk of **transparency**. For one respondent, a sustainable fashion brand should *"take responsibility and show the numbers"* to illustrate their sustainable practices. This can be done with **certifications** such as GOTS, TRS, fair trade. This also links to the concept of accountability seen in the literature.

Paradox of sustainable fashion

Lastly, an interesting aspect revealed by the interviews is that brands consider that **sustainability is a journey**. They mention that a real sustainable fashion brand is not possible as the production comes with a carbon footprint and environmental impacts. *"Sustainable fashion is more of a goal, it's a journey. The most sustainable is probably to use the clothes that are already produced like second-hand clothes and so on. Or be naked."* Another brand thus considers that there are *"different levels of sustainability within each corporation in terms of impacts categories"* rather than "sustainable fashion brands". In the same way, a respondent says: "*it's a bit misleading to say a brand is sustainable because there's a carbon footprint with anything"* and prefers the word "low-impacts fashion brand".

4.1.2 CONSUMERS' POINT OF VIEW

The analysis of the consumers' point of view is divided into two parts. First, the components included in their definition of sustainable fashion are presented. Then, we dive deeper into the aspects they mention as characteristics of a sustainable fashion brand.

4.1.2.1 DEFINITION OF SUSTAINABLE FASHION

When asked about their definition of sustainable fashion, consumers include several elements (appendix 14). These aspects are presented below from highest to lowest number of mentions by respondents for each category.

Sustainable fashion is fashion that respects the planet and the environment with a reduction of the negative environmental impacts.

For them, this involves:

- **The raw materials used:** the use of eco-friendly materials such as organic fabrics (like organic cotton), natural (linen, hemp), recycled fabrics but also innovative fabrics like Tencel. One respondent nuances that recycled fabrics should be considered as a second choice because "*the process used for the recycling are really heavy in energy consumption and in the end don't contribute anymore to create eco-friendly fabrics*".
- **The dyeing process**: the use non-toxic dyes, "*like fabric is dyed with vegetable dyes instead of putting chemicals in nature".* This leads to the **reduction of chemicals and waste** featured in our definition of sustainable fashion**:** respondents promote the use of as little chemicals as possible and eco-friendly and non-pollutants processes for the fibres transformation as well as reduce waste. The use of **local resources** is mentioned by one respondent.

Sustainable fashion respects people and has the least negative impacts on men and women involved in the fashion industry.

Elements related to the social category were mentioned by consumers. They especially focus on workers empowerment through the whole value chain: *"At the social level, it is to ensure the fair treatment of the workers, but on the whole chain, not only people who produce the*

clothes. Also people who collect cotton in the fields, people who work in the stores, all these jobs linked to a brand".

- An **ethical production** and consideration of the workers' welfare through safe working conditions
- **Fair wages**, living wages and equal pay: *"One of the really important things is equal pay and fair wages for the people who make the clothes in any countries whether it is in Europe or in Asian countries or South America, for example."*
- **Human health** was addressed by one consumer: sustainable fashion is "*fashion that respects […] health because some fabrics used are also dangerous for consumers' health*".

Concerning the cultural/philosophy category, sustainable fashion implies:

- Buying less clothes: "*What we need is to consume less, buy less and especially, buy fair*". This is in line with the **anti-consumerism** philosophy and avoidance of **overconsumption** as seen in the definition of sustainable fashion. Better quality is also mentioned. Someone else defines sustainable fashion as "*having a certain conscience about the way we dress*". Also, a respondent says that the **true value** (time and skills) of the clothes should be acknowledged. This links to the concept of slow fashion as seen in the literature. Then, one interviewee suggests that sales should be justified, for example to get rid of old stocks. The influence of free return/exchange on overconsumption is also evoked by one respondent: "*Do they offer free return of clothes and everything that create a vicious circle for the consumer where they're going to buy/return/buy/return?*".

Some **aesthetic aspects** are also brought up in the consumers' definition of sustainable fashion:

- They agree that clothes should be designed to last and not considered as throwable. That means they are **long-lasting** in time thanks to their **quality** (resistant to washings) and not based on trends: "*products of quality made to last, […] that people won't get*

tired of after 2 months because the trend will change". This relates to the characteristic of a timeless design mentioned in the literature and this idea is particularly supported by one respondent**:** *"create timeless models, styles with functions, details that address a consumer's need".* Moreover, she adds that the design should limit waste, and the fabrics scraps be reused. Similarly to one of the brand interviewed, one consumer argues that the fashion aspect of sustainable fashion should also be outlined as **a way of expression**: *"Fashion is contemporary, not just a basic white t-shirt. Fashion is more outspoken and fits a personality".*

These aspects raised in the cultural and aesthetic categories echoes to the concept of slow fashion as presented in the literature.

Lastly, some **economic elements** are touched upon:

- One respondent talks of a new economic aspect that was not highlighted in the literature: the **price** should reflect the true value of clothing: *"Nobody is aware of the true workload [behind clothes-making]. T-shirts at 5, 10 or 15€ have become normal and that is the issue."* She thinks that the price should covers the value brought by a well-made and ecological product produced in fair working conditions.
- The concept of PSS is brought up with **custom-made** clothing by someone: "*custom-made is also environmentally responsible since it fully meets one customer's wish*".

4.1.2.2 CHARACTERISTICS OF A SUSTAINABLE FASHION BRAND

When going deeper into what are the characteristics of a sustainable fashion brand, consumers mention in second place these following aspects (appendix 15) (from highest to lowest number of mentions by respondents for each category).

Transparency is key. For them, sustainable fashion brands should provide information on how the product is made, by who, what materials are used. One respondent says that sustainable fashion brands give "*more information than conventional brands […] because they are proud to show that they are fair and sustainable*". Respondents also think that brands should show that they know where the raw materials come from, where their clothes are produced, in which factories, but also visit them to check the ethical workers norms as one respondent

explains: "*do they know the factories where it is produced, that they visit from time to time? Because it is also important not to always rely on what we are told*". Thus, this ties with the concept of **traceability** mentioned in the literature.

The empirical research shows new elements related to the communication about the brands: talking about their vision, **commitments** and **opinion** is also important for the respondents: *"I will also look at how the brand communicates about [sustainability]. […] If the brand also discusses what they think about their materials, that means that they are really thinking about what is happening instead of just putting the words there".* For another interviewee, it is important for her to "*understand how [the brand founder] looks at the industry, how she's trying to change things with her suppliers*".

Respondents also bring a new dimension not mentioned in the literature: the brand's responsibility. For them, sustainable fashion brands must show that they are continually trying to **improve** and that they know what can be done for the people and the planet to achieve sustainability. Several respondents consider sustainable fashion brands as brands that have **commitments to sustainability from the beginning**: "*So you started the brand, […] want to be in fashion because […] you want to improve the industry", "the commitment must be perceived from the beginning*", *"It's important that they are sustainable from the beginning and it's not a marketing thing***"**. They should communicate on their sustainable practices in very clear terms and provide evidences, for instances with labels, reports and numbers. However, respondents acknowledge that certifications are sometimes difficult to acquire for smaller brands. Nonetheless, consumers' opinion show that this can be compensated by brands that are **open to dialogue** and discussion: *"if we send them an email, they will answer eagerly, explain their approach and they will be transparent*". One respondent also considers that sustainable fashion brands' communication should educate and inform consumers about sustainability, similarly to the previous literature review: *"a third [characteristic of sustainable fashion] is to try to raise awareness among consumers for a responsible consumption".*

The other main aspects discussed by consumers relate to the cultural category:

- Anti-consumerism is again mentioned but more focused on the **overproduction.** This idea completes the previous philosophy of **anti-consumerism** and overconsumption mentioned by consumers in their definition of sustainable fashion. This relates to the slow fashion movement. Overproduction should be avoided by producing in smaller quantities and having a **limited number of collections** per year, no mass-production. One consumer explains that "*They [sustainable fashion brands] are not there to sell thousands of pieces of one pants. They're always sticking to the limited quantities or small batches so they don't overproduce*." Another respondent insists that the small number of collections is a necessary condition for a fashion brand to be sustainable, *"even if the fabrics are organic, and if the supply chain is traceable*". This respondent and another one add that the marketing and communication of brands should support this by not encouraging overconsumption or promoting frequent new collections. Following the same idea of a considerate production, one interviewee mentions the responsibility of designers: "*the designer, I think, has this responsibility to always question himself and see if there is a market, a customer base for their creations".*
- The **life-cycle approach** of sustainable fashion brands is also raised by consumers. Indeed, for them, sustainable fashion brands address sustainability through a global approach, considering each step of the value chain, from the design to the distribution, transport and choice of retailers, as well as the raw materials growing to the packaging used. The approach to sustainability should be global and comprehensive. One respondent gives the counterexample of H&M and their conscious collection: it is not enough to produce just one collection that is more sustainable while the other product lines are not. Then, the end of life of the clothes is also to be addressed: *"Sustainable fashion companies also think about what happens to the clothes after they are sold, the end of life ",* how customers use their clothes, for example with a take-back scheme, durability guarantee, repair or recycling program. This links to services about the end-of-life of the products with a closed loop.

Next, the other elements that were mentioned a lot fall in the **social category**:

- Respondents gave a **local production** as a characteristic of sustainable fashion brands. They mentioned a production in Europe or a support of the French industry (for the French respondents). But they also allow an international production provided that the brand ensures fair working conditions and traceability: "*For me, it's important that a brand tries the very best and produces in Europe. There are some brands who are producing in Asia but they really care about the workers there".* But in general, a short supply chain was stressed by respondents: if brands work on "*the carbon footprint, short production chains are really important, by producing in France for example".*
- **Communities empowerment** was also emphasized. Similarly to one brand, a consumer mentions the empowerment of villages by jobs creation in good working conditions: *"a brand that was created to support crafts, for example people in Vietnam who are under-employed and not well paid, or support the French industry by buying from fabrics producers in [France]*". Likewise, they develop the idea further with the support of local craftmanship, fair trade and the support of NGO's and social activities.

Equally important, respondents also complete the environmental aspect about the materials used with **use of existing materials** such as fabrics leftovers, end of fabrics rolls or fabrics scraps (upcycling) was also considered as a feature of sustainable fashion brands, although one respondent mentions that *"it is very trendy at the moment, I don't know if in terms of business model, it is viable, lasting in time."*

Lastly, one **economic element** was pointed out. The concept of **distributed economy** was picked up through the mention of **short distribution channels**: "*Ethical fashion brands decrease the margin of retailers by selling directly or online. But they increase the percentage of the price that is allocated to higher quality raw materials, more traceable and to the garment makers*". One person also highlights the independence of the brand in the sense that the brand is not part of a big company holding with non-sustainable brands.

No additional elements related to the aesthetic category were raised.

Eventually, some respondents talked about the **paradox of sustainable fashion brands**. They explain that a 100% sustainable fashion brand is not possible because producing clothes has an impact: "*I think it's impossible to be fully hundred percent sustainable because there are*

always things that are not sustainable, like dye or using electricity or whatever". One clarifies that sustainability is a journey: "*so no company is hundred percent perfect and no person is also, but that's okay. And I think all of us are working towards a better future, so it's also good."* An interviewee resumes: "*To be sustainable, we shouldn't produce clothes".*

4.2 POSITIONING DIMENSIONS OF THE BRANDS INTERVIEWED

First, the positionings of the brands interviewed will be presented. From there, the dimensions used by them in their positioning are analysed

4.2.1 DESCRIPTION OF THE POSITIONING OF THE BRANDS INTERVIEWED

The positioning of each brand interviewed is presented below (based on appendix 9).

Pool is a second-hand clothes concept that revalue the **end of life** of clothes. Its philosophy is *"clothes remain, people change"*: people change in morphology, moments of life, but the clothes remain the same. Thus the same piece of clothing can fit several persons. The vision is reversed: instead of viewing one person with a lot of different clothes, the focus is on the garment itself that is going to have multiple lives and functions depending on the person who wears it. For that, Pool remove the brand tag to come back to the "clothe's DNA" and its core features (fibres, structure). Indeed, it aims is to bring the consumer to change his vision of his relationship with clothing. Pool is "*an experience of ourselves*", a focus on your own desires and **identity** to pick up the right piece of clothing that fits him in size, color, shape, design and style to express his personality. Therefore, Pool wants to **raise awareness** and encourage people to more sustainable and conscious purchases by buying something because it really suits the person. It invites the consumer to question himself, create his own values independently from the brand marketing. Then, Pool's goal is to *"have the experience of new clothes with second-hand clothes"*. It thus deletes the unpleasant smell, messy organisation and lack of sizes often found in traditional thrift shops and encourages the customer to experience the inherent features of the clothes (quality) by touching and trying it. This also translates into the limited number of pieces available for customers to take time to think of their choice. Conferences are also organised to explain how to read the tags to understand the fabrics composition, as well as repair workshops.

Dedicated is a purpose-driven brand that offers modern fashion with *"low impacts in high standards"* and "***flavour and attitude***" in the design. *"Everything we do is based on creativity and sustainability."* Indeed, they want to *"do things the right way*", to be "*the Patagonia of casual wear*" by taking responsibility and reducing the negative environmental impacts for the supply chains, the production and materials used. However, they also want to appeal to the contemporary consumer with responsible clothes that are also cool, with "*exciting prints and way more flavour*". So although other fashion brands might have the same philosophy of sustainability, it is different in "*the expression*". They consider the **design** as a distinctive feature. "*Most of others low impacts brands do basic clothing that are not out of fashion and not in fashion. Young people need to feel relevant and with the time. Fashion is a way of expression to communicate who you are or who you want to be*". In addition, although they have the extra costs of the certifications (for example GOTS, Fair Trade, GRS, …), they also position themselves in the **mid-price range**, to keep the price affordable. They also want to have an impact on the climate crisis through political lobbying and **activism** for sustainable development and positive development. Growth and financial leverage are necessary in order to have that power. They also consider that they have a role in raising awareness and informing people that they also have the shared responsibility of the climate crisis.

Mud Jeans' positioning is described as "*the first [pioneer] and only circular sustainable denim brand*". Their business model is based on leasing: "you pay for 12 months and then you can send back the pair of jeans or keep it. It's important that we get the raw material back" for their closed loop with organic cotton. They want to be responsible for the products in the market and try to get it back after-use. **Circular economy** (continuous use of resources and elimination of waste) is thus one of their pillars. Fair factories are another of their pillar (production in nearby factories that are frequently visited, fair wages and good working conditions) with strong relationships and a shared mindset, vision and values for the fashion industry with all of their stakeholders. Their last pillar is **positive activism**: "*as pioneers in circular denim we hold a responsibility to drive change. To do so, we aim to empower our leasers, customers and even fellow industry interested parties by sharing all of our knowledge with them. With this, we hope to inspire them to apply similar or equal changes in their world*." Being **transparent** and open on what they do is also one of their feature to inform the

customer. Moreover, they support sufficiency (don't encourage over purchasing): "*we don't have **seasons**, our collection is permanent and trans-seasonal, with a few additions every now and then. Our production is determined by market demand, which ensures that we don't over produce and end up with unwanted stock."* Lastly, they also mention that they are the only sustainable denim company that is also **B-Corp**.

Kuyichi is a "*conscious denim brand that gives pure goods to people who find quality and environmental values important*". Their goal is also **to inspire people** to live more consciously and be a point of information for them about environmental sustainability in fashion. They also want to be the **reference** in terms of perfect basics. A particular attention is given to the **fit** of the jeans, so that it can suit every body type. They have a **permanent collection** ("*never out-of-stock collection*") with some styles that are sometimes slightly updated to improve the fit over time and "*feel more in fashion*", "*so you can come back to your favourite fits over time".* They don't do any sales or follow the season. Their non-seasonal items aim to "undermine the trends related to the fashion system". About the **pricing**, they want to be accessible, at the same price level as "*Levi's or Scotch and Soda, or these kinds of brands that are more mainstream*". They also highlight their transparency and **authenticity**: "*We just want to be true to ourselves […] in the honesty and trying to open up about what we do and why we do it, don't only look at ourselves but also look at how we can influence the fashion industry as a whole […] see how we can get other brands to join us as well"*.

Nudie Jeans is a **denim brand** with a strong fundament based on social values (audit and reports from suppliers, fair wear foundation) and environmental values (raw materials, organic cotton, fabric production) with a long-term perspective on sustainability very much integrated in the core of the brand. "*We've gotten a lot of attention over the years due to many of our sustainability procurements […], transparency and social responsibility in the supply chain. I'd say that we are one of the **pioneers** in the industry and had been for a long time when it comes to sustainability related business operations*". The brand aims to cooperate with consumers to enable more **circular production** patterns by free repair, good channels for take-back scheme and reuse programs integrated in all of their own retail stores. They also have **good partnerships with their suppliers** to transform these collected material resources

and a completely controlled fibres loop, although it is constantly developed. Then, they also strive for change together with other brands.

4.2.2 DIMENSIONS USED IN THEPOSITIONING OF THE BRANDS INTERVIEWED

The analysis of the sustainable fashion brands' positioning explained in the previous section allows us to identify the aspects on which they position themselves (Appendix 17). They are presented below (from highest to lowest number of mentions by brands):

- **Having an impact**: brands highlight their willingness to change customers behaviours to more sustainable choices, engage other brands to join the change toward sustainability. They point out their activism and willingness to change the fashion industry (including political lobbying)
- **Educate, inform** customers and stakeholder, conscientisation about sustainability
- **Transparency** (along with certification)
- **Brand's approach/vision**: take responsibilities, pioneering approach, be a reference, continuous improvement, long-term perspective, avoid over-purchasing
- **Environmental impacts**: low environmental impacts, material sourcing
- **Product**: category, fit, quality, design and collections
- **Economic aspects**: price, business model (end-of-life with second hand and repair services, circular model with leasing, re-use programs and take-back schemes)
- **Relationships with stakeholders**: customer identity (fashion as a way of expression), long-term collaborations with suppliers and consumers, shared values with stakeholders
- **Social impacts**: fair factories and working conditions

These dimensions can be classified into 8 main categories: product-related, role of the brand, transparency, approach/vision of the brand, relationships with stakeholders, social impacts, environmental impacts, economic aspects.

4.3 POSITIONING DIMENSIONS OF SUSTAINABLE FASHION BRANDS MENTIONED BY RESPONDENTS

After analysing the dimensions used in the positioning of the brands interviewed, we now look at the aspects they mention when differentiating other sustainable fashion brands. The same is done with the consumers interviewed.

4.3.1 DIMENSIONS MENTIONED BY BRANDS WHEN DIFFERENTIATING OTHER SUSTAINABLE FASHION BRANDS

The brands interviewed were asked what aspects they use to differentiate other sustainable fashion brands and their perspectives on the different categories of sustainable fashion brands. The main aspects used to differentiate sustainable fashion brands are as followed (appendix 18) (from highest to lowest number of mentions by brands):

Sustainability impacts chosen: the main aspect mentioned by respondents is the difference in the impacts chosen by sustainable fashion brands. They say: *"Brands often choose one of the impacts to focus on"*. Another adds: *"You can't do everything, […] so you really have to make decisions, what kind of effect it is you want to work with. And what kind of topics you want to focus on."* Some brands focus more on the environmental or social aspects while other are also animal friendly. Within each category of impacts chosen, respondents also agree that brands have different sustainability points of focus. For example, brands that focus on the environmental aspect can differ in the **materials** used and production process. Concerning the **social** impacts, some brands work more on the living wages while other focus on employment creation and revitalization of villages. The interviewees also talked about the economic aspect: **price** is also an aspect used to differentiate sustainable fashion brands. *"Some are many times more expensive".* They also differentiate brands on the **business model**. For example, some brands have a circular model or focus on the end-of-life of the product with repair services.

Product-related aspects: the respondents then mentioned aspects related to the product, like the **product category**: "*Patagonia, they are outwear, [while we are] casual wear*" in the sense that Patagonia offers specialized clothes for outwear sports while the brand interviewed offers more casual every-day clothes. The next aspect is the **style, design**: some brands have a more minimalistic style and other a more original style. Brands also differ in their **collections**: some

brands offer a limited range of products with only basics, focus on a specific product or develop a capsule collection while other brands have a wider range. The last aspect on which sustainable fashion brands are differentiated is the **quality** of the clothes.

Sustainability commitment: the respondents also talked of the differences that are found in the brands' commitments regarding sustainability. Indeed, they point out that some brands integrated sustainability in their values **from the start** and were **pioneer** in sustainable fashion. On the other hand, "*brands that used to be conventional […] then they make a switch and go in sustainable production*". They also perceive brands differently on their **level of sustainability commitment**. This is illustrated by the example of one interviewee about organic cotton: brands that try to have a more sustainable production by certifying the cotton with the "Better Cotton Initiative" label which is not as reliable as the Global Organic Textile Standard certification.

Others aspects were also named (without developing them): brands differ on transparency, marketing mix (distribution, promotion) or customer target.

4.3.2 DIMENSIONS MENTIONED BY CONSUMERS WHEN DIFFERENTIATING SUSTAINABLE FASHION BRANDS

Although the consumers interviewed mention that sustainable fashion brands share some similarities, they agree that they all differ on several aspects. They are similar on their general shared value of sustainability: "*I think they are all basically saying "we have ethical working conditions. We use natural materials.", they all say something like "We're good for the planet. We're doing it better.*"". One respondent adds that this might result *"in brands working with the same sub-contractors or fabrics suppliers*". However, the interviewees agree that there are nuances on how brands explore sustainability, among others: *"Some have chosen the same general impacts but there are variations on some levels"*

The aspects used by consumers to differentiate sustainable fashion brands can be classified in similar categories as the ones mentioned by brands (appendix 19). These are explained below:

Product-related aspects

- **Design**: consumers use the clothes' design as a differentiation aspect for sustainable fashion brands. On one hand, they differentiate brands that have a classic, simple design "*with nude, black and white colours made to last*", a timeless design. On the other hand, they distinguish brands with a more original, elaborated and colourful design. The latter are described as "*more stylish, fashionable*", with "*fancy patterns*", "*inspired by the fashion runway*".
- **Style**: consumers also talk of the style of the clothes. For example, some brands have a streetwear style, others a more feminine, smart or "adult" classic style. *"What makes them [sustainable fashion brands] different I think it's mostly the style", "Then it's also possible to look at style, a bit more like trendy like Kings of Indigo or Thinking Mu, or like very feminine brands like Cossac and Noumenon for example."*
- **Collection**: consumers distinguish brands that have a limited number of collections or products per year. For example, brands that take orders on demand. They also identify brands that only offer a limited range of product like just basics clothes (simple t-shirt, sweatshirts) and brands with more variety in products. *"Brands with basics, timeless pieces, sweats, t-shirts quite plain".*
- **Sizes**: the availability of different sizes of clothes is also a differentiating aspect. One respondent explains *"a lot of sustainable fashion brands, for example People Tree, they produce their clothes very big or the sizes are rather big so they don't have XS".* Another person talks of the wide range of sizes offered by a brand: "*it is also a commitment that is societally responsible to show in their communication that their clothes suit everybody: they have a very wide range of sizes".*
- The **quality** of the clothes is also mentioned: some brands offer higher quality of clothes that consumers can keep longer. A respondent explains: *"I've bought from sustainable brands and there were products that weren't of good quality".* Another one talks of *"Patagonia [that] works a lot on the quality of products that we can keep for a long time".*
- **Fit**: one respondent comments on brands that specifically pay attention to the fit of the clothes to offer pieces that suit everybody type: *"models with timeless cut that can suit any morphology", "This model suits me perfectly and I can wear it at any occasion".*

Sustainability impacts chosen by brands

The analysis shows that consumers differentiate sustainable fashion brands based on the sustainability impacts that they choose to focus on: social, economic and/or environmental impacts. For example, one interviewee perceives that some brands "*are more on the environment or ethical aspects, or both*". Moreover, respondents note nuances found in each of the three categories.

- **Social/human aspects**: the respondents especially differentiate brands that have a **local production** in the country of origin or nearby, from brands that produce internationally abroad. They mention that an international production can be ethical as well with fair working conditions. Then, for them, some brands make **fair factories** a number one priority by regular monitoring and visits. Regarding that, they distinguish brands that have their **own factories**. Also, some brands focus more on providing a **living wage**. The next difference raised is on **communities empowerment** with brands supporting craftmanship: "*she uses Japanese artisanal methods […] I think that's also another way of supporting and boosting artisanal crafts and prefer working with indigenous people that are making that and empowering them*". **Social integration** is also referred to with the example of a brand that empowers women in prisons in Peru and Thailand: *"They are helping those women to keep a livelihood while they're in prison and also maintain their families".* The last differentiating aspect is **inclusivity**: a interviewee talks of one brand that *"has inclusivity values, so their photoshoots feature lots of different women, different bodies and of all colours".*

- **Economic aspects**: **price** was the most cited element. Indeed, consumers differentiate brands that want to be affordable and accessible with cheaper prices while being sustainable from brands that are more expensive, luxurious. *"There are more affordable brands like Armed Angels or Thinking Mu, then the more expensive ones like Signe or Cossac".* One respondent links the price with the production process chosen: *"Thinking Mu and People Tree, the prices are really inferior to Les Récupérables or Aatise, I understand that the way used will be more industrial, so they'll make*

economies of scale on the quantities produced". After that, the **business model** is also a differentiation criteria with some brands having a circular model (leasing, renting, take-back, recycling), offering repair, or having a collaborative process with the customer (co-creation, customization, made-to-order). The innovative aspect of the business models is also raised by some consumers. Then, several respondents talk of brands that want to **avoid overproduction** by working on their stock management. They mention brands that "*produce in small batches*", "*they produce in limited quantities, don't have endless stocks*", or have a system of pre-orders. In particular, the respondents make the difference between brands that **produce at larger scale**, "*for the mass*" from brands with a **limited production**. When talking of the former ones, someone says: *"People Tree […] it's at a large scale and with an international production. […] It is closer to H&M because it is more industrialised and sold on different websites. It's still good but it is a little bit the H&M of ethics".* The fact that some brands do **sales** or not is also stressed.

- When talking of **environmental aspects**, consumers differentiate brands on the **material** used. This ranges from brands doing upcycling, using leftovers to limit waste, recycling or using innovative eco-friendly fabrics versus conventional fabrics. One consumer distinguishes: *"Thinking Mu and Armed Angels are companies that have really great materials. They work with a lot of the more sustainable* materials […] and recycled materials as well". The **local sourcing** of these fabrics is also mentioned in addition to the attention to the **chemicals** used and the **carbon footprint**.

Transparency and communication

Respondents differentiate brands on their **level of transparency**, the level of details and information they give. For example, one interviewee highlights a brand: *"On each product page, they describe what was the carbon footprint of this product, which materials used, how much it consumes, how it is produced, etc*." Another person mentions: "*they have a true transparency initiative on their website where they break down completely the product's cost on each product's page*". This is consistent with the literature on the concept of **traceability**. Then, consumers have the impression that some brands know more than others where their

products and materials were made, in which factories, by who, etc. Brands with **certifications** can show proofs of their sustainability compared to brands that do not. Therefore, several respondents said that being **open to communication** was also a trust factor of transparency for brands. They spot brands that answer customers' question, communicate honestly: "*One distinction that I make is when you feel that the team behind [the brand] knows the answers, will tell you when they don't know*". Indeed, **honesty on the sustainability level** is important for one respondent. She talks of a company that says that they are not perfect but know that they can do better and communicate on the next steps to improve themselves.

Marketing and promotion

Respondents perceive sustainable fashion brands on their **reputation**. Indeed, according to them, some are established as references in the sustainable fashion industry, are famous for their sustainability approach. "*Mud Jeans, People Tree and Armed Angels are the brands that are most known for being sustainable"*. Then, the **size of the company** is also a classification aspect: start-up, smaller or bigger companies. After that, the interviewees also comprehend brands on their **marketing on sustainability**: do they talk a lot about their sustainability or not, what words do they use, do they advertise? The distinction is made between brands that have a big marketing budget to promote their sustainable approach and brands that are "*quietly sustainable without advertising*". This leads to the **visual identity** aspect. A respondent distinguishes brands that are marketed more on the "*handmade, craftmanship image*" from more "*commercial*" brands with a more "*cold visual identity*".

Role of the brand

Consumers identify brands that want to **have an impact**: brands that are **activist** (have a "*blog for activism, publish case studies [on sustainability]*"), fight overconsumption. They also note the reason **why the brand was founded:** "*what do they support (craftmanship, French production, …)*?", "*Did they start the brand to improve the industry*?". Furthermore, they evaluate brands on their **sustainability commitments**: did they integrate sustainability in their values from the start (pioneer approach)? In which extent do they commit to sustainability? One respondent mentions the levels of efforts: "*brands that don't care and make no efforts,*

brands that do greenwashing, and brands that are already doing all they can". Similarly, another person talks of "*the opportunists who surf on the green trend, that might use organic cotton but it is not reliable about the origins of the cotton. They have dubious labels like H&M and their conscious collections*". Finally, one respondent also observes brands that **educate, inform** the consumer by mentioning a brand that wrote a book to educate consumers on sustainable fashion.

Other differentiating aspects raised by some respondents were the **distribution**: brands that sell directly without intermediary (short distribution channels), or have sustainable retailers or not. Lastly, some people differentiate brands on the **customer target**: "*Sustainable brands that want to reach people who are not necessarily looking for sustainable fashion*", reach "*people interested in fashion in general, and not just sustainability*".

5. DISCUSSION AND CONCLUSION OF THE EMPIRICAL RESEARCH

The empirical study allowed us to provide answers to our research questions:

What is sustainable fashion? What is a sustainable fashion brand?

The empirical results are consistent with the literature review. Both brands and consumers view sustainable fashion as a reduction of the negative environmental and social impacts. Concerning the **environment**, it relates to the use of low-impacts materials and fabrics (organic, natural, recycled materials, upcycling), the reduction of the carbon footprint, waste and chemicals (including the dye used). The local aspect of resources is highlighted by consumers. For the **social impacts**, workers and communities empowerment are mentioned with fair wages, workers welfare and safe working conditions. Both parties consider that employment creation contributes to social sustainability. In addition, consumers include fair trade practices, the support of craftmanship and social initiatives and NGO' as characteristics of a sustainable fashion brand, as well as a local production. Consumers also mention the consideration of human health and diversity/inclusivity in their definition of sustainable fashion while this was not reported by brands. However, the long-term relationships with value chain partners are only pointed out by brands when talking about the shared sustainable vision and acknowledgement of their suppliers. This is not mentioned by consumers. Animal welfare was very little spoken of by both groups.

Then, **economic aspects** are also referred to: business models that address the end of life of the product with a circular model (renting, leasing, second-hand) and services involving the customer (co-creation, customization, …). This relates to the concept of PSS seen in the literature review. The concept of distributed economy is also touched upon by consumers in their characteristics of a sustainable fashion brand when they mention a **short distribution channel**. Then, one consumer invokes the **independence** of a sustainable fashion brand (not part of a company holding) and a **price** that reflects the true value of the clothes.

In the **aesthetic category**, the timeless and no waste design for the clothes as explained in the literature review is echoed in the interviews. One brand in particular (Pool) refers to slow fashion with the focus on the value of the garment itself independently from the brand and

image. The quality and long-lasting aspect of the clothes are also cited by brands and consumers.

Concerning the **cultural category**, the anti-consumerism philosophy was cited by brands and consumers. It is shown by a limited number of collections per year, smaller quantities produced and the non-adherence to the typical seasons and sales to avoid overproduction. Consumers adds that overconsumption must be avoided by buying less and acknowledging the true value of clothes. Then, brands talk of the life-cycle approach through a careful consideration of the production and choices of fabrics. Consumers also insist on the importance for sustainable fashion brands to adopt a holistic approach and consideration of the whole value chain for sustainability.

Transparency is also another important characteristic of a sustainable fashion brand for both groups, whether it is by giving information, showing numbers and certifications and demonstrating traceability. The conscientization of brands on sustainability by raising awareness, informing and educating stakeholders on sustainable consumption was also explored during the interviews.

Futhermore, a new element revealed by the empirical part as a characteristic of a sustainable fashion brand is the **purpose of the brand** (to change the industry)**,** its **commitments to sustainability** from the beginning (pioneer approach and not for marketing purposes) and strive for a **continuous improvement** for sustainability.

Finally, the analysis reveals the presence of a **paradox** concerning **sustainable fashion brands**. On the same idea explained in the literature review on the contradictory aspect of sustainable fashion, brands agree with consumers that a truly sustainable fashion brand does not exist because producing clothes has an environmental impact. “To be sustainable, we shouldn’t produce/buy clothes”. Sustainability is thus rather considered as a goal and journey.

<u>On which aspects do sustainable fashion brands position themselves?</u>

The analysis of the positioning of the sustainable fashion brands interviewed allowed us to classify the dimensions used in their positioning into 8 categories: **product-related** (product category, fit, quality, design and collections), **role of the brand** (have an impact,

educate/inform), **transparency** (including certifications), **approach/vision** of the brand (be a reference, take responsibilities, pioneering approach, continuous improvement, long-term perspective and avoid over-purchasing), **relationships** (shared vision with stakeholders and customer identity through fashion), **social impacts** (fair factories, social auditing), **environmental impacts** (low-impacts materials and sourcing) and **economic aspects** (price and business model).

Which aspects are used by brands and consumer to differentiate the different sustainable fashion brands?

Several positioning dimensions cited above are also mentioned by brands when they explain on which aspects they differentiate other sustainable fashion brands. Indeed, they perceive brands differently on the **sustainability impacts chosen** (environmental, social and economic), **product-related aspects** (product category, style/design, collections, quality) and **transparency**. However, they do not mention the role (have an impact and educate/inform), approach/vision of the brand (be a reference, pioneering approach, continuous improvement, etc.) and relationships aspects (shared vision with stakeholders and customer identity through fashion) when differentiating other sustainable fashion brands. Still, they explore other aspects linked to **sustainability commitments** (sustainability from the start, level of sustainability). One brand also names the **distribution, marketing and promotion**, and **customer target** as differentiating aspects.

On the other hand, when differentiating sustainable fashion brands, consumers expressed all the above aspects mentioned by brands except for the relationships dimension of the brand (shared vision with stakeholders). Moreover, new additional aspects that brands did not describe were mentioned. In the product-related aspects (design, style, collections, quality and fit), consumers also talk of the **sizes**. Concerning the sustainability impacts chosen by brands (social/human aspects, economic aspects, environmental aspects), consumers also distinguish brands that value **inclusivity**. Regarding the aspects related to transparency and communication (level of transparency, certifications), they particularly insist on the brand's **traceability**, **openness to communicate** and **honesty about the sustainability level**. They also explain more about the differences in the marketing and promotion of sustainable fashion

brands (**reputation**, **size** of the company, **marketing on sustainability** and **visual identity**) and the distribution (**short distribution channels** and **sustainable retailers**). Then, when referring to the role of the brand (having an impact, activism, sustainability commitment, educating/informing role), consumers highlight the **reason of the brand creation**. Finally, together with brands, they also notice that sustainable fashion brands differ on their **customer target**.

Discussion

In this empirical part, we explored brands and consumers' definition of sustainable fashion and characteristics of a sustainable fashion brand.

Brands' definition of sustainable fashion is in line with the literature review on the environmental aspect (although there was no mention of the local aspect of the resources used). Concerning the social side, brands mostly mentioned aspects related to workers empowerment (with fair wages) and communities empowerment (job creation, revitalization). Consumers developed further the aspect of communities empowerment mentioned in the literature with the support of local craftmanship, fair trade and the support of NGO's and social activities. Then, the characteristic of strong and long-term relationships with partners is accentuated by brands with a new element: the public acknowledgement of the supply partners' work. However, they do not talk explicitly of labour rights, human health and diversity/inclusivity although these elements were part of our definition based on the literature. Then, only one brand briefly alludes to animal welfare.

The anti-consumerism philosophy featured in the cultural category was also further developed by consumers when talking of a limited number of collections per year to avoid overproduction and overconsumption. But our findings also bring new elements to the cultural category: brands go further with aspects related to the brand's **commitment to sustainability** (pioneer, inspiring) and consumers add the acknowledgement of the true value of clothes. Similarly, a new economic aspect was found in consumers' analysis: a **price** that reflects the true cost of the clothes.

Our findings also complete the literature on the definition of sustainable fashion on aesthetic aspects: the importance of fashion appeal (fashion as a way of expression to show your identity) and the quality and long-lasting aspect of clothes are highlighted.

Moreover, the analysis shows that the notion of transparency goes beyond the literature. It extends to the brand's communication about their vision, commitments and opinion on their practices. Indeed, the consumers' interviews show that the openness of the brand to communicate and discuss is featured as a characteristic of sustainable fashion brands.

After that, a new addition to the literature by consumers is about the brand's responsibility: continuous improvement**,** with a proactive vision on sustainability. The results also stress that respondents consider as sustainable fashion brands the brands that have commitments to sustainability from the beginning and a life-cycle approach (global approach to sustainability).

Finally, an interesting perspective was revealed by this research: respondents do not acknowledge the existence of a 100% sustainable fashion brand because producing clothes comes with environmental impacts. Sustainability is rather considered as a journey.

After focusing on the definition of sustainable fashion, we studied the positioning of the sustainable fashion brands interviewed to draw out the dimensions used in their positionings. We also explored the aspects used by brands and consumers to differentiate sustainable fashion brands. The positioning dimensions found constitute a new addition to the scarce literature on the positioning of sustainable fashion brands. We uncovered several positioning dimensions that can be classified into the following categories: product-related, sustainability impacts chosen (social, environmental and economic aspects), role of the brand, transparency and communication, approach/vision of the brand, relationships, sustainability commitments, marketing and promotion, distribution and customer target.

As seen in the literature review, the positioning dimensions used by brands (appendix 17) should be valued by consumers. The results show that it is the case. Consumers mentioned all of them (appendix 19), except for the relationships dimension of the brand (shared vision with stakeholders). In the literature review, the pragmatic and radical approach of sustainable fashion brands was also introduced: brands that use the mainstream retail and marketing methods to spread sustainable fashion and brands that innovate with new practices like an

innovative business model. We can observe that this difference of approach was implicitly mentioned by two consumers that talked about the innovative aspects of some brands' business models (circular model, production on demand) compared to other brands.

Then, the results are in line with the article of Kapitan et al. (2019) on the components of a sustainably superior positioning (sustainability credibility, environmental impacts, consideration for the stakeholders, resources and energy efficiency and a holistic approach) as well as the research from Bandyopadhyay and Ray (2020). The latter highlighted the aspects that should be addressed by sustainable fashion brands: authenticity, products attributes and an appealing sustainability-related backstory. The positioning dimensions found in our research are consistent with their results, except for the appealing sustainability-related backstory which was not demonstrated in our analysis. This aspect relates to the communication on the reason why consumers should turn to sustainable fashion and how that action can impact their lives. Nevertheless, it can be linked to our positioning dimension about "educating and informing stakeholders on sustainability".

Our findings thus bring new elements to the literature on the definition of sustainable fashion and the characteristics of a sustainable fashion brand. Moreover, this research explores a new study field about the positioning dimensions of sustainable fashion brands.

LIMITATIONS

There are several limitations to our findings. First, the methodology for the constitution of the brands sample can present a bias because of the selection criteria based on the environmental and social aspects. It could be argued that brands that meet only one of the environmental or social aspect could qualify as a sustainable fashion brand. Thus, our definition of a sustainable fashion brand could be contested. Moreover, the empirical results are based on data from 5 brands and 8 consumers that accepted an interview. The results should thus be generalised with caution. There is also a limitation on the results of the definition of sustainable fashion and the characteristics of a sustainable fashion brand because the perspectives of brands were less explored than for consumers. It is because the time for the interviews for brands was more limited, thus the focus of the questions was more on their positionings.

Finally, this study did not investigate the extent to which these positioning dimensions were valued by consumers and how brands communicate these values to consumers. This could be the object of future quantitative researches, for instance, to study the effectiveness of different positioning strategies for fashion retailers (benefit positioning, surrogate positioning and features positioning) as discussed earlier in the literature review. Then, the positioning dimensions found in this thesis are both sustainability and product-related attributes. The trade-off between sustainability-related and product-related attributes in the positioning of brands could also be tested. Furthermore, it would be interesting to investigate which dimensions are more relevant and contribute to a superior sustainable positioning for sustainable fashion brands, similarly to what Kapitan et al. (2019) did in their article.

CONCLUSION

The current model of fast-fashion causes several negative environmental and social impacts. As a result, sustainable fashion brands try to offer fashion with lower impacts. However, the literature showed that it is difficult to assess the sustainability level of brands and thus to identify sustainable fashion brands. One reason is that there is no official definition of sustainable fashion as it differs depending on the stakeholder's perspective. In the scope of this research, we drew a **definition of sustainable fashion** based on the concepts of

sustainable products, the vision of business managers and designers of sustainability in fashion, the definitions of sustainable fashion and slow fashion found in the scientific literature. The empirical study brought out similar elements found in the literature review although animal welfare (veganism) was hardly spoken of by respondents. However, results highlight new aspects in the characteristics of a sustainable fashion brand: the **purpose of the brand**, its **commitments to sustainability** and the **strive for a continuous improvement** for sustainability. Moreover, the concept of sustainable fashion brand is discussed, similarly to the literature review. Indeed, consumers and brands both question the existence of 100% sustainable fashion brands as producing clothes has an environmental impact. Instead, they talk of "low-impacts fashion brands" and rather view sustainability as a journey and goal.

To address the confusion of stakeholders to identify sustainable fashion brands, it is important for brand to have a clear sustainable positioning. That is why this research focuses on the **positioning of sustainable fashion brands** and more specifically investigates the dimensions on which sustainable fashion brands position themselves. They can be classified into 8 categories: product-related, role of the brand, transparency, approach/vision, relationships, social impacts, environmental impacts and economic impacts.

Then, the perspectives of brands and consumers on sustainable fashion brands were explored. Brands talked of several aspects when **differentiating other sustainable fashion brands**. These can be classified into the following categories: sustainability impacts chosen, product-related aspects, transparency and communication, sustainability commitments, distribution, marketing and promotion, customer target. Consumers mention aspects from the same categories although they talked of additional elements within some categories.

To summarize, the findings provide additional information to the literature on the definition of sustainable fashion. Moreover, this study investigates the positioning dimensions of sustainable fashion brands, a topic that is scarcely addressed in the literature. Finally, the positioning dimensions found can serve as a basis for future researches: they could be tested with quantitative methods to explore how consumers value these positioning dimensions and guide brands to improve their positioning.

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