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**CONSUMER'S RIGHT TO BE INFORMED – COMMUNICATING SUSTAINABILITY
ISSUES THROUGH FASHION MARKETING**

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Abstract			
<p>The purpose of this study is to explore fashion companies' current marketing efforts in the context of sustainability. More specifically, this study is focusing on the level of leading and slow fashion companies' sustainability communication and their possible socially responsible marketing strategies applied. A qualitative content analysis was conducted where the data was collected through the selected sets of samples of leading and slow fashion companies' websites.</p> <p>The theoretic framework for this study is based on the previous research about the level of sustainability communication and different socially responsible marketing strategies. Based on these studies, two coding schemes were formed. The first coding scheme includes the sustainability topics that can be identified in the fashion companies' communication while the second coding scheme consists of the different sustainability messages communicated based on the socially responsible marketing approaches.</p> <p>One of the main findings was that the current level of fashion companies' sustainability communication is wide addressing several different sustainability issues. The difference found between the leading and slow fashion companies was in the nature of this communication. Another main finding was the differences in the socially responsible marketing messages; all slow fashion companies were promoting one of the socially responsible marketing messages while half of the leading fashion companies did not have any specific message included.</p> <p>This study contributes to give an outlook in the current state of fashion companies' sustainability communication. Additionally, some generalized differences between leading and slow fashion companies' sustainability communication were identified. As for the managerial implications, the results of this study can be used especially by fashion marketers to identify their company's level of sustainability communication. The results also indicate how different socially responsible marketing strategies can be applied in order to promote more sustainable consumption.</p> <p>This study had some limitations. Since sustainability is a wide topic, it could have limited the possibility to construct a comprehensive coding schemes around the sustainability topics. Other factors that can be considered as limitations were using the websites as the unit of analysis and having only one researcher doing the coding for the content analysis. For the future research, more research efforts are needed to enable categorizing sustainability topics of fashion and to better identify different socially responsible marketing strategies.</p>			
Keywords Sustainability, socially responsible marketing, fashion marketing, slow fashion			
Additional information			

CONTENTS

1	INTRODUCTION.....	8
1.1	Background of the research topic.....	8
1.2	Purpose of the research and research questions	11
1.3	Research approach and methodology	11
1.4	Outline of the research.....	12
2	SUSTAINABILITY IN FASHION INDUSTRY	14
2.1	The development of sustainability in fashion industry	14
2.1.1	Defining sustainable fashion.....	15
2.1.2	What makes a fashion company sustainable?.....	16
2.1.3	Slow fashion.....	17
2.2	Consumers' role in sustainable fashion.....	18
3	COMMUNICATING SUSTAINABILITY THROUGH FASHION MARKETING	21
3.1	The power of influencing consumers.....	21
3.2	Communicating issues and efforts of sustainability in fashion.....	22
3.3	Socially responsible marketing	24
3.3.1	Social marketing	25
3.3.2	Green marketing.....	26
3.3.3	Green demarketing.....	28
4	RESEARCH DESIGN AND IMPLEMENTATION	31
4.1	Research method	31
4.2	Data collection and analysis method	32
4.2.1	Sampling and unit of analysis	32
4.2.2	Creating unstructured coding schemes	34
5	FINDINGS OF THE CONTENT ANALYSIS	38
5.1	Sustainability issues communicated	38

5.2	General category – visibility, vision and reporting sustainability	39
5.2.1	Visibility	39
5.2.2	Vision.....	40
5.2.3	Sustainability Report.....	42
5.3	Environment	43
5.3.1	Circular economy.....	43
5.3.2	Ecological footprint	45
5.3.3	Materials	47
5.3.4	Transportation and facilities	49
5.3.5	Microfibers.....	51
5.3.6	Offsets	52
5.4	Social responsibility	53
5.4.1	Philanthropies	54
5.4.2	Transparency.....	55
5.5	Human rights	57
5.5.1	Equality, diversity and inclusion.....	57
5.6	Community involvement and development	59
5.6.1	Volunteering	59
5.7	Labour practices.....	60
5.7.1	Training suppliers and working conditions.....	60
5.8	Consumer issues	62
5.8.1	Educating consumers	62
5.8.2	Garment care.....	63
5.8.3	Take-back program	64
5.9	The main message of sustainability communication.....	66
5.9.1	Consume responsibly.....	67
5.9.2	Consume differently.....	68

5.9.3	Consume less	69
5.9.4	Consume as usual.....	70
6	CONCLUSIONS	72
6.1	Discussion of findings.....	72
6.2	Theoretical contributions	75
6.3	Managerial implications	76
6.4	Research limitations.....	77
6.5	Suggestions for the future research	78
	REFERENCES.....	79
	Appendix 1 Sustainability issues communicated – leading fashion companies	83
	Appendix 2 Sustainability issues communicated – slow fashion companies	88
	Appendix 3 The main message of sustainability communication – leading fashion companies.....	93
	Appendix 4 The main message of sustainability communication – slow fashion companies.....	94

1 INTRODUCTION

This chapter provides the introduction and overlook of this research. Firstly, a brief discussion of the background of the topic of this research is provided in the context of sustainability and fashion marketing. This introduction is followed by the presentation of the purpose of this study and the research questions. Lastly, the research approach and methodology of this research will be introduced while giving the outline of the rest of the study.

1.1 Background of the research topic

The importance of fashion and apparel industry to economy can be considered globally remarkable. We are talking about the industry that is valued for more than 2 trillion euros, employing around 60-70 million people worldwide (Clean Clothes Campaign 2015). But this importance comes with a price; the industry has enormous negative impact on the development of our planet and this impact is often underestimated.

Every single fashion item produced brings up multiple negative impacts on not only the environment but on societies too. This is due to the fact that the fashion items tend to have relatively large environmental footprint in addition to multiple negative societal impacts caused by their manufacturing. (Pedersen & Gwozdz; Gardetti & Torres 2013, p. 2). To give a better perspective of the environmental impact, fashion manufacturing is estimated to cause nearly 10% of total global greenhouse gas emissions which is more carbon emissions than all the international flights and maritime shipping put together. Not to mention that it is the second highest industry using the water worldwide, contributing to 20% of global wastewater. Hence, the current state of the fashion industry has been described having an environmental and social emergency due to its unsustainable practices with issues such as labour safety, use of hazardous substances in production, and having underpaid women as workers (UNECE 2018b).

Many of the issues regarding the fashion industry are usually linked straight to the production side but this doesn't mean that the consumers don't play any role in the

sustainable development of fashion. The switch of consumers engaging more to rapid consumption, referred to as the increasing demand for “fast fashion”, has led to a situation where the emphasis is put on to speeding up the production process and reducing the lead time from design to retail. (Gardetti & Torres 2013, p. 2; Armstrong, Connell, Ruppert-Stroescu & LeHew 2016). This pressure in turn has made fast fashion a phenomenon that jeopardies environment sustainable practices for the whole fashion industry (McNeill & Moore 2015). The growth of the fast fashion companies is a good indication of the power that the consumers possess; to use their purchasing decisions to affect the demand and eventually the business models of companies.

If the consumers continue to put their purchase power to companies based on fast fashion business models, we will find ourselves in the situation where the sustainability issues will keep getting worse. The volume of post-consumer waste is already creating a problem for landfills that are filled with textiles. In the USA alone, each consumer is throwing away around 32 kg of textile and clothing waste annually (Armstrong et al. 2016) and this post-consumer waste will continue to grow as long as the consumers are engaged with unsustainable consumption patterns.

A positive notion is that there is some evidence of an increasing interest among consumers about the sustainability issues of fashion industry (Armstrong et al. 2016; Beard 2008; McNeill & Moore 2015). The problem is however that consumers are facing multiple challenges to act upon these attitudes leading to a situation where the unsustainable consumption habits remain unchanged. Still, one of the biggest barriers is the lack of knowledge and awareness around these issues of fashion production and the negative impacts of unsustainable consumption. This is why United Nations has identified “the consumer’s right to be informed” as one of the key Sustainability Development Goals (SDGs) in order to transform the fashion industry. But unfortunately informing the consumers in such issues has not been fully embraced by the companies so far. (UNECE 2018a).

Still there is some hope: communication of the fashion industry related to sustainability issues is expected to be one of the main focuses of the companies to gain their credibility in the area of sustainability. According to the State of Fashion

Report (2017) by Business of Fashion and MacKinsey & Company, the sustainability will no longer serve the companies only as a marketing-focused CSR initiative. Instead, it will be integrated into the planning of the company where circular economy thinking is adopted for the value chain. Thus, the companies are expected to go beyond the “green marketing” by embracing the innovations to unlock the opportunities towards more sustainable fashion industry.

One possible tool to tackle the information barrier and to embrace the goal of “consumer’s right to be informed” is fashion marketing. Marketing is already proved to be a powerful tool to influence consumers’ habits of consumption making the fashion professionals key players to lead the change towards more sustainable fashion industry (Armstrong et al. 2016). Some marketing strategies to communicate sustainability issues do already exist that could drive this information flow and could be applied to put sustainability in the center of interest in the fashion company’s marketing efforts. These strategies can be seen as linked to the concept of socially responsible marketing including approaches such as social marketing, green marketing, and green demarketing (McNeill & Moore 2015; Zaharia & Zaharia 2012; Armstrong & Reich 2015).

The growing concerns of the impacts of fashion industry has also led to the growing interest in the academic research regarding fashion and sustainable responsibility. Indeed, this topic has been trending upwards in the past 12 years providing a balanced mixture of qualitative and quantitative research and the use of different research methods. However, sustainable responsibility is usually left as a background setting in the research and has not been given the main focus. In addition, when considering all the different areas of fashion, the greatest amount of studies by numbers are related to fashion consumption leaving less attention to other areas of the industry, including fashion marketing. (Johnson, Lee, Choi, Mun & Yoo 2013).

To conclude, since fashion marketing can be seen as a possible driver to transform the whole industry and there is a lack of academic research from the companies’ point of view, this field is put into the center of interest for this research. In other words, this research will explore in more detailed manner how fashion marketing can

be used to communicate sustainability and therefore possibly lead the change to more sustainable fashion production and consumption.

1.2 Purpose of the research and research questions

The purpose of this research is to explore the fashion companies' current marketing efforts in the context of sustainability. More specifically, this study's interest is put on the fashion companies' level of communication regarding informing consumers about the industry's sustainability issues; which marketing strategies are applied and which of these strategies appears to be the most commonly embraced.

Therefore, two research questions were formulated to guide this research and by answering these questions, the main purpose of this study can be fulfilled:

- 1) Is there a difference in the level of communication of sustainability issues between the leading and slow fashion companies?*
- 2) What types of socially responsible marketing strategies leading fashion and slow fashion companies are using in communicating such issues?*

1.3 Research approach and methodology

In order to find the answers for the two research questions defined above, this study applies a qualitative research method to explore the fashion companies' marketing efforts in the context of sustainability. Data needed for this research is collected through the selected sample of fashion companies' websites to identify the main themes in their marketing efforts for informing consumers of the sustainability issues.

The data collected is then analysed by utilizing a qualitative content analysis as a research technique which remains as "one of the most popular methods by which to study the content of communication" (Prasad 2008 via Zharekhina & Kubacki 2015). Moreover, the content analysis provides a technique to examine the mode of message

presented through communication and to produce the counts of frequency of these messages (Daechun 2007; Gaur, Saransomrurtai & Herjanto 2015). Thus, as a method of analysis, it is aligned with the purpose of this study; to explore the fashion companies' marketing efforts in their communication of sustainability.

1.4 Outline of the research

This research is divided into six main chapters. The first one is this introduction chapter, where the first glance to the background of the research topic is provided. This first section also includes the presentation of the purpose of this research as well as research approach and methodology used in this research.

The following two main chapters will introduce the main issues and theories related to the topic of this research. Firstly, the concept of sustainability in fashion industry is introduced by giving a brief history of development of sustainability in fashion. This outlook of the development will include the definition of sustainable fashion and sustainable fashion company as well as introducing the idea of slow fashion as a business model. Right after this section, the consumers' role in the context of sustainable fashion will be explained while giving the perspective of consumers' current interests and challenges when it comes to sustainable fashion.

The second theoretical section, namely the third main chapter of this study, will present the concept of fashion marketing and how it can be used to communicate sustainability issues. This chapter discusses the power of fashion marketing as influencing consumers while giving the perspective of why communicating such issues could be relevant for the fashion companies. In addition, the introduction for some of the possible marketing strategies in this context is provided. These strategies are identified from previous academic research and include approaches referred to as socially responsible marketing strategies: social marketing, green marketing and green demarketing.

After the theoretical chapters, the structure of this research follows up with the introduction of research design. In this fourth chapter, the research method will be described more in-depth while also giving a detailed information regarding the data

collection and analysis method. This chapter presents also the two sets of samples chosen for this study and the unit of analysis. To conclude the fourth chapter, the creation of a coding scheme for this study is discussed; what were the items included in this coding scheme and their description. The fifth chapter in turn, will be all about presenting the findings of this research's empirical analysis.

Lastly, the final conclusions regarding this research are presented in the sixth chapter including the discussion of findings, theoretical contribution, managerial implications, alongside with research limitations and suggestions for future research.

2 SUSTAINABILITY IN FASHION INDUSTRY

This chapter introduces the concept of sustainability in fashion. Firstly, this chapter discusses an overall development of sustainability in fashion industry while also providing the definition of sustainable fashion and sustainable fashion company. Moreover, a concept of slow fashion is introduced as an approach to be implied in fashion companies' business models. Lastly, this chapter presents the consumers' role in this context: what are their key interests related to this issue and what are the current challenges they are facing when trying to put effort in contributing to a more sustainable fashion industry.

2.1 The development of sustainability in fashion industry

As stated before, there are various sustainability issues in the fashion industry. The most discussed issues within the research field of fashion sustainability are related to supply chains which have even more significant environmental and societal impacts compared to other fashion business operations. These issues in fashion industry are remarkable varying from “consumers and labor safety, air pollution, GHG emissions, waste management, water and waste water, fair wages and labor conditions, land use, biodiversity and animal welfare”. (Khurana and Ricchetti 2016).

Looking over past two decades, when the companies working in fashion industry started to pay more attention and committed more to their sustainability of supply chains, there are some important lessons learnt how to approach this issue. According to Khurana and Ricchetti (2016), in the beginning of the journey of fashion companies to explore more sustainable supply chains, the vision was to focus on first tier suppliers, highlighting some single issues. Moreover, the issues were handled separately from core business by CSR department and the practices required were considered as “private” ones.

But fashion companies have come a long way from this starting vision of how sustainability in supply chains is perceived. Khurana and Ricchetti (2016) identified in their study the five most significant drivers for this shift of a change of vision that would require the company to go beyond monitoring, adopt a comprehensive

approach, look beyond first tier of suppliers, integrate sustainability to core business practices and bring transparency to the supply chain. However, when talking about the sustainability in fashion, it is important to consider other business areas as well. This would mean including such issues as how the materials are produced, what type of marketing strategies are used to promote these products and what happens in the end of the product's lifecycle in the post-consumer phase.

Even if sustainability issues of fashion supply chains are still strongly existing and remain unsolved, we can still consider the change of vision over the past decades as a positive sign. The sustainability is not perceived anymore as a single sole process or product within a company. Instead, it is more and more integrated throughout every aspect of the company including the inside and outside and considering the supply chain as a whole. (Khurana & Ricchetti 2016). Of course, we cannot deny the fact that bigger changes in practice are needed in order to transform the whole industry. Where the fashion industry is going from this point, when considering its sustainability aspect, relies on the people engaged within it (Beard 2008).

Overall, it can be argued that today's situation of fashion industry and its commitment to sustainability has reached the point where the companies have to own up to "its responsibility to society and its place within it". Furthermore, the past decades the society and consumers as individuals have been getting more and more aware of the various different impacts the fashion consumption has on people and environment. (Beard 2008). Putting this development in different words, the fashion industry is facing new social pressure to be committed in the sustainability: the brands are seeking for serving their even more conscious customers by trying to be the most authentic and transparent as possible.

2.1.1 Defining sustainable fashion

Sustainability has different meanings and it is usually associated with environment. Armstrong and Reich (2015) argues that sustainability falls right under the broad view of CSR. They define sustainability as "an activity that meets the needs of the present without compromising the ability of future generations to meet their own needs".

Sustainable fashion in turn can be defined as the development or use of fashion where there is no harm done to the people or the planet within. Moreover, sustainable fashion can even “enhance the well-being of the people who interact with it and the environment it is developed and used within”. (Garetti & Torres 2013, pp. 3-6). This basically refers to a situation where fashion is in alignment with the principles of sustainability where the negative connections only exists depending on the way fashion is used (Garetti and Torres 2008).

Given these different efforts to approach the concept of sustainable fashion, the term itself remains highly debatable. The aim for this research is not to give one perfect definition covering every aspect of what can be included into sustainable fashion. Instead, it is seen as a concept differentiating from the traditional fashion business models where there is a significant effort put on sustainability throughout every phase fashion item’s lifecycle. In other words, this research considers sustainable fashion as an idea of producing, promoting, using, and discarding fashion in a way there is minimal or better yet no harm to the environment nor the society.

2.1.2 What makes a fashion company sustainable?

Fulton and Lee (2013) argue that there are two different ways for a fashion company to be defined as a sustainable one: if they consider the whole life-cycle of their fashion items starting from the fibre all the way to the post-consumer phase or if they are focusing on one point on this cycle and do it in a sustainable way. However, as they conclude, focusing on the whole life-cycle has been proved to be much more effective strategy.

Those fashion companies aiming to become more sustainable ones and contributing to an overall more sustainable fashion industry need to consider changes in production and consumption patterns. This means creating patterns that “respond to basic needs and bring a better quality of life, while minimizing the use of natural resources, toxic materials and emissions of waste and pollutants over the lifecycle” (Garetti & Torres). From this point of view, fashion companies need to go beyond pure marketing and branding in order to be positioned as “ethical” or sustainable

fashion brand. Instead, it would require integrated sustainability practices throughout the company's procedures to involve all the stakeholders. (Beard 2008).

However, the fashion companies committed to embrace more sustainable fashion are more likely to face certain challenges. Due to high complexity of the industry and its manufacturing processes, it creates many challenges for a fashion company to be truly transparent. Aspers (2006 via Beard 2008) provides an example of this complexity: when producing a fashion item, it requires to consider every single little detail in the design and figure out how to source all the needed materials and components (e.g. fabrics, buttons, finishing techniques) to ensure their "ethically secured". Furthermore, the challenges are not over after manufacturing since the fashion item needs to be transported (either to retail or straightly to end user) which in turn will include the phases of aftercare and disposal to complete the full product lifecycle and these should be conducted in the most sustainable manner too.

To conclude, the sustainable fashion company can be seen as an industry player that puts a high value on conducting the business as the most sustainable way as possible. This would preferably include considering every single aspect of the fashion item's life-cycle even if this approach may raise some challenges to fully embrace sustainability. One approach that might facilitate fashion companies' attempt to move towards becoming sustainable business is to implement the concept of slow fashion as a business model which is the next topic for discussion.

2.1.3 Slow fashion

The one possible solution to the current unsustainable way of consuming and producing fashion is to consider the option of "slow culture approach" referred to as slow fashion. This approach aims to change how the whole industry as a system functions while linking consumer ethics together with fashion consumption. Moreover, slow fashion would challenge all the stakeholders of fashion to "question established practices and worldviews, questioning the economic models underpinning fashion production and consumption". (McNeill & Moore 2015).

The approach of slow fashion is not only about cutting off the unsustainable fashion consumption. Instead it can actually add more value for the whole consumption experience. According to McNeill and Moore (2015), one purpose of slow fashion is to put the attention on value of the fashion item and appreciate the object by knowing thoroughly the overall process behind the production from raw material to finished goods. In this way, such detailed knowledge regarding the fashion items' production could be included as a part of the whole consumption experience which in turn could bring more value.

A similar idea to this is suggested by Alexander (2012 via Armstrong et al. 2016): the possibility for having economic contraction. This approach would require “a slowing and reduction of production and consumption” while prompting to discover other methods to satisfy human needs with nonmaterial means. Of course, this would require a lot of time to be fully embraced since fashion industry is still in its very early stage of adopting sustainable practices in its business processes. Not to mention the fact that it would require the consumers to make some dramatic changes in their consumption habits but also to seek other options to find value and happiness from without material.

All in all, the approach of slow fashion could be serving as a base of business model towards more sustainable fashion; to promote slow consumption by giving more value to the fashion items and add up the consumption experience. There are already some companies embracing this approach as a “counteract” against the more traditional fashion business models, especially when it comes to fast fashion. Therefore, slow fashion can be seen as a one key concept in transforming the whole industry to become more sustainable. When it comes to this research, the slow fashion approach has been chosen as one key concept to explore the link between the fashion companies marketing efforts in the context of sustainability.

2.2 Consumers' role in sustainable fashion

Consumers' impact on sustainable fashion and its development is crucial, meaning that the lack of awareness is an issue that cannot be ignored. The whole industry is driven by demand so if the consumers are mostly interested in the consumption of

fast fashion, the companies would continue providing cheap fashion where the designs in the stores are changed in every few weeks instead of twice per year as traditionally before (Garetti & Torres 2013, p. 2).

Moreover, Annie Sherburne claims that “the biggest impacts of textiles and garments occur when they are being used by the consumer” (Garetti & Torres 2013, p. 8) making it clear that the consumers’ actions will add up to the negative impacts of the sustainability in fashion. Sure, neither the consumers’ nor the fast fashion as business model are not the one and only issue to be fixed but the impact of these two factors has to be taken into consideration. What can be done instead, however, is to develop the new ways of thinking for the industry to make the transition to sustainable development.

According to Sustainable Development (2001 via Garetti & Torres 2013, p. 8), in order to develop the sustainable thinking, there are two elements needed. Firstly, it requires “the use of collective learning mechanism” in order to create some kind of structure and dialogue concerning of our shared vision of the sustainable society. And secondly, there is a need for sustainable individuals (Cavagnaro & Curiel 2012 via Garetti & Torres 2013, p. 8) highlighting the individuals being as a key part of a solution for this issue as well. Hence, it is calling for “more responsible attitude for the consumer” (Garetti & Torres 2013, p. 8).

The problem is however, that those consumers seeking for being more responsible have to face several challenges when acquiring sustainable fashion. First of all, the use of phraseology in this area of fashion creates a lot of confusion and can be overwhelming. Beard (2008) identifies several terms such as “ethical, fair trade, organic, natural, sweat-shop free, recycled, and even second-hand, or vintage” being used in the branding and marketing messages of more sustainable fashion. To make it even worse, fashion industry is lacking clear guidelines, agreed code of conduct, and there is no single organization nor governmental body this field. This puts all the weight and pressure on consumers to have the responsibility to make sense about all the different phrases, certifications, labels and messages used around more sustainable fashion which can turn out to be very time consuming. (Beard 2008).

As the consumers' perception of sustainable fashion is shadowed by the confusion and uncertainty around term of sustainability, the challenges acquiring sustainable fashion are not ending here. MacNeill and Moore (2015) show with their study that the consumers lack of consumer knowledge, availability, economic resources, retail environments and societal norms are all affecting on their ability to consume fashion sustainably. Therefore, it is crucial to tackle these issues in order to have better informed consumers, reduce consumption, waste, and negative environmental and societal impact around the fashion industry.

To conclude, many consumers may not realize the negative effects of their fashion apparel purchases especially with fast fashion items which in many cases are only worn once before disposal. This is a topic the fashion companies can address and educate consumers about through their marketing to promote more sustainable consumption patterns while also raising awareness of negative social and environmental effects the fashion industry has as a whole. At the end of the day, the fashion companies have all the power to influence on consumers' purchase decisions and to increase overall sustainability of the fashion industry as a whole (Fulton and Lee 2013).

3 COMMUNICATING SUSTAINABILITY THROUGH FASHION MARKETING

To tackle the challenges consumers are having in contributing sustainable fashion, marketing can play a huge role in facilitating this change. The knowledge barrier regarding sustainable fashion consumption has been identified as one of the most significant internal obstacles since the consumers in general have very little knowledge about the various environmental and social issues linked to the fashion production and consumption (Reiter 2015; Billeson and Klasender 2015 via Armstrong et al. 2016; Britwistle & Moore 2007 via McNeill & Moore 2015). This barrier could be removed if the fashion companies would include raising awareness of these issues in their marketing efforts.

The purpose of this chapter is to introduce the concept of fashion marketing in the context of sustainable fashion and its power to influence the consumers' attitudes and purchasing decisions. Moreover, in this chapter there is an introduction of different socially responsible marketing strategies that can be used to influence consumers consumption patterns and perception of sustainable fashion. This section of discussion of different marketing strategies includes the approaches of social marketing, green marketing and green demarketing.

3.1 The power of influencing consumers

As mentioned previously in this research, the current way of producing and consuming fashion is far from sustainable and some serious changes are needed. According to Armstrong et al. (2016), the disciplines strongly connected to the design and marketing of fashion are in the center stage to transform the industry as well as to ensure the well-being of future generations. Hence, fashion marketing could be used to “draw awareness to increase knowledge about the destruction that results from industry practice seems diametric”.

Moreover, Armstrong et al. (2016) argue that fashion professionals are like gatekeepers, having a huge impact on consumers' choices and decisions since they are the ones designing the products and marketing messages as well as choosing the

materials and sourcing methods. Thus, they are the ones who must be “prepared to lead” to transform consumers’ behavior towards more sustainable consumption. In addition, McNeill and Moore (2015) also highlight the importance of removing the information barrier especially regarding the fast fashion. Their argument indicates that the key for the change is to make consumers understand the “conundrum between the cheap, fast fashion that is available to them and their altruistic interests in environmental sustainability”. The consumers seem to be highly affected by the fashion marketing messages and amount of these messages to pressure them to buy more, fashion companies should take the responsibility and consider their power on consumers when designing their marketing strategies.

According to Gardetti & Torres (2013), there are three approaches to promote more sustainable consumption: consuming differently, consuming responsibly and consuming less. However, the difficulty relies in turning attitudes into sustainable behaviors meaning that increased interest on the environment, human rights and other sustainability issues is not always reflected in the purchasing decisions (Armstrong et al. 2016; Bray et al. via McNeill & Moore 2015). This definitely creates a challenge for marketers, especially since the current nature of fashion industry is all about rapid changes in trends and disposal of “unfashionable” apparel (Britwistle and Moore 2007; Morgan and Britwistle 2009 via McNeill & Moore 2015). One way to approach this issue, is to utilize different marketing strategies to tackle the main barrier blocking the consumers’ from purchasing sustainable fashion: lack of awareness.

3.2 Communicating issues and efforts of sustainability in fashion

For the companies, the increasing pressure coming from various stakeholder groups to address sustainability may lead to a need to evaluate their practices and processes from sustainable point of view and make strategic actions in this matter. As the pressure grows from the consumers side as well, the companies and marketers are getting more sense of obligation to act in order to “undo the ecological damage presumably caused by consumption” (Armstrong & Reich 2015). But taking the actions is not solely enough meaning that is important for the companies to also

inform and communicate their actions taken and this can be done by implying sustainability issues within their marketing strategy.

Fulton and Lee (2013) assessed fashion companies' sustainability efforts by using GRI as a framework. According to their findings, companies were most commonly addressing environmental and social aspects, like focusing on organic materials and Fair-Trade working conditions, leaving the economic sustainability far behind. The most common economic sustainability effort mentioned were either donations or philanthropies. Focusing on the GRI sustainability guidelines, including all environmental, social and economic aspects, can help the fashion companies to figure out which marketing strategy they should choose and what are the sustainability issues they should address to respond the increased pressure.

Pedersen and Gwozdz (2014) suggest that the fashion companies have three strategic options when it comes to responding to this pressure: conformance, resistance or opportunity-seeking. Conformance would mean that the company is simply trying to conform with the requirements whereas resistance indicates that the company would either negotiate their way to ease the pressure or total avoidance of the requirements. Lastly, the opportunity-seeking as a strategy would lead the company to move beyond the requirements or to conform in advance. Interesting is that at least when it comes to Nordic fashion companies, the strategy chosen seems to be most of the times conformance leaving the possibility of opportunity-seeking and resistance far behind. Furthermore, they suggest that the opportunity-seeking will be more likely to

In conjunction with raising the awareness the issues of fashion production and consumption, fashion companies can and should use their marketing to communicate their consumers how they are contributing to sustainable fashion. As Fulton and Lee (2013) indicate, the companies need to make constant marketing effort to show consumers how they are trying to make a difference and be more sustainable so that the consumers can make more informed decisions about their purchases. The companies' websites can provide communicative advantages if it is used as a tool to share their sustainable practices. Moreover, not only can it provide a platform of marketing the companies' sustainable efforts, but it can also be used to educate the consumers regarding the fashion sustainability issues.

The issue is however, that an average consumer is not interested to put too much time into this research process leaving a brand no other choice than to “promote and engage its audience with a clear and simple message that is tangible and exciting, yet devoid of confusing jargon” (Beard 2008) in order to convince the consumer and win its trust. In addition, a wide diversity of using the word “sustainability” can lead in some level of confusion among consumers but still it reflects well the various different ecological strategies the companies are taking (Zaharia and Zaharia 2012).

3.3 Socially responsible marketing

Socially responsible marketing can be defined as a marketing philosophy that sees the businesses having the responsibility to consider the best interest of society in the present and long-term. This would mean considering “ethical, environmental, legal, public, social and cultural values and issues of society and targeted market” through all the marketing efforts of the company. Furthermore, social responsibility should be like a built-in mechanism keeping in mind that whatever the marketing message is, it is going to affect the lives of people to whom it is delivered. (DeWitt & Dahlin 2009). Although this concept can easily sound similar to the idea of CSR, Zaharia and Zaharia (2014) remind that “strategically-based marketing view of sustainability distinguishes it from corporate social responsibility”.

Since the level of consumption in fashion industry is already unsustainable, increasing the demand constantly by putting the pressure on consumers to buy more, the current way of marketing can be seen to be socially irresponsible. This is the case especially regarding the fast fashion where the companies increase the number of fashion seasons to satisfy consumers’ constant desire to purchase new fashion items. The decisions in this type of business model are made emphasising the speed rather than sustainability. (McNeill & Moore 2015).

So why should fashion companies be interested in changing their marketing strategies to more responsible ones? According to DeWitt and Dahlin (2009), such strategies can help companies to “increase corporate goodwill, build brand awareness, socialize their corporate messages and ultimately boost their sales”. They even argue that ultimately socially responsible marketing strategies will pay off in

economic terms as well giving the pay off on the companies' bottom line even though the question whether being socially responsible pays off in monetary terms has been highly debated.

Since the pressure to communicate the sustainability issues increases, the companies will have to adjust themselves to handle this pressure. This would require either conformance, resistance or opportunity-seeking (Pedersen & Gwozdz 2014) and especially with opportunity-seeking, the fashion companies could have the possibility to figure out how this would pay off in bottom line as well. After all, the socially responsible marketing could bring up good business opportunities when it is considered as a business model, at least according to DeWitt and Dahlin (2009) who indicate such benefits being “attracting and retaining loyal customers, identifying and managing reputational risks and brand identity, attracting the best quality employees, helping to identify and solve social and environmental concerns and even reducing costs”.

Overall, since the definition of the socially responsible marketing remains quite vague, there are several different approaches that can be seen to fall under the term socially responsible marketing strategy. The next three subchapters will introduce such strategies that the fashion companies could incorporate as an approach to fully embrace the benefits of socially responsible marketing.

3.3.1 Social marketing

One marketing approach that can be linked to the concept of socially responsible marketing is called social marketing. According to Zharekhina and Kubacki (2015), social marketing is all about figuring out what are the means to motivate people to take the responsibility of their own well-being since they can themselves make a great difference in their choices live responsibly. Holding the people accountable for their choices can be a bit harsh message to get through, which is why Zharekhina and Kubacki (2015) argues that this particular marketing strategy is blamed to be “manipulative” or “unethical” in the eyes of consumers. But there exists a positive approach to implement this particular marketing strategy.

There are two different approaches that social marketing can be divided into: empowering and patronising. The main idea behind the empowering approach is to “increase people’s ability to control their lives by encouraging freedom of choice, and using questions, storytelling and behavioural language, and engaging people in personal development”. (Zharekhina & Kubacki 2015). In the context of fashion, this could mean for example fashion company’s effort to question the current fashion production practices or consumption habits and to utilize storytelling and behavioural language in their marketing to help the consumer to make more conscious choices. This would in turn highlight the freedom of choice from the consumers’ point of view in purchasing fashion. Therefore, empowerment can be basically seen as a mean to encourage consuming responsibly through fashion marketing.

In contrast to empowerment, patronising is about promoting “lack of freedom of choice, nudging and conforming to imposed authoritarian norms, and the use of strong emotions such as fear, shame and guilt”. The issue with the patronising approach (especially when using fear, shame or guilt) is that it might trigger a defensive mechanism in consumers’ minds which in turn can lead to undesired interpretations of the marketing message. (Zharekhina & Kubacki 2015). Moreover, patronising seems to be more of the approach to choose when it is about nonprofit organisation’s marketing or some authority is trying to influence on consumer’s behaviour. Therefore, for the fashion companies patronising is most likely not the most appealing strategy approach due its forced message especially since the consumers are already skeptical and unmotivated to change their fashion consumption habits.

3.3.2 Green marketing

According to Zaharia and Zaharia (2012), green marketing is “a tool towards sustainable development and satisfaction of different stakeholders” meaning that it exceeds the consumers’ current needs. In addition, in their definition of green marketing, the environment is the key core value which impacts everything the company does and as well as on the company’s culture on every level (internally and externally). Quite similarly to this view, DeWitt and Dahlin (2009) define green marketing as a range of activities such as “product modification, changes to the

production process, packaging changes, and modifying advertising” to fit in promoting the products that are environmentally safe. Thus, in their definition the emphasis is put on to products that are environmentally friendly while providing differentiated value to the consumers.

Despite efforts to give an exact definition to the green marketing, there are several meanings attached with this concept which can sometimes even contradict each other (DeWitt & Dahlin 2009). This is why it remains as more an overall idea that is used as a base for the marketing strategy rather than having one clearly defined approach to implement this concept in practice. Still, one commonality remains between different definitions: putting the environment first. Having the emphasis on the environment requires the companies to have great deal of knowledge regarding customers’ requirements while also having the ability to meet and even exceed these requirements keeping in mind their need to contribute to the environmental sustainability as well. Therefore, the company has to have their core interest in environmental issues and use this as their competitive advantage. (Zaharia & Zaharia 2012).

As the ecological impact of fashion depends on the “human practices that accompany its production and consumption” (Zaharia & Zaharia 2012), these ecological impacts of fashion tend to be the heaviest ones in the post-consume phase. Green marketing could therefore provide a pathway for fashion companies to address this issue by promoting products that last time (no need to discard so quickly for not being fashionable) or by providing the consumers the “second life” program where the company takes care of the garment disposal. This will give the companies an opportunity to operate in shaping public opinion and educate consumers the need for action regarding the climate change (Zaharia & Zaharia 2012).

Still, there is one negative association that the consumers might have when companies run advertising campaigns for products claiming to be environmentally friendly. This negative association is called green-wash which according to Zaharia and Zaharia (2012) means “exploits rising customer concern about environmental problems and an emerging demand for more sustainable lifestyles, as well as

undermining leadership efforts of companies with genuine green products and credible sustainability performance”.

The term of green-wash is usually linked to an idea (in the consumers' minds) that the company is merely using their sustainability messages as a marketing tool while in reality giving empty promises about their efforts regarding the environmental issues. In such situations, customers get very skeptical and cannot really trust whether the company is being sincere with its actions or is it only purely because of the desire to attract the ethical consumers. The outcome is strongly dependent on the characteristics of the brand message (Armstrong & Reich 2015) giving the situation high sensitivity that should be considered when choosing the green marketing as a strategy.

Regardless of the slight possibility of having the negative green-wash associations, utilizing this green marketing can still be beneficial for a fashion company. From this point of view, green marketing could be something that the fashion companies may want to consider as a solution to promote sustainability, inform the consumers of environmental issues and to be part of transforming fashion industry through their marketing efforts. Overall, this would encourage consumers to consumer differently by choosing the greener choices for the sake of the environment.

3.3.3 Green demarketing

Another way to approach socially responsible marketing is to choose green demarketing as a strategy. Armstrong and Reich (2015) define green demarketing as a strategic approach that “attempt to reduce consumption at a category level through encouraging focal brand purchase, ostensibly out of concern for the environment”. This is totally opposite idea to traditional marketing strategies which has aimed at creating demand to increase the sales for the offering. Still, it can be argued that the suppressing demand can actually be beneficial for the company in certain situations.

Such situations, where demarketing can be an attractive marketing strategy, can be linked to the overall goal of the company and its message. Kotler and Levy (1971 via Armstrong & Reich 2015) created a framework that illustrates three different

categories of demarketing depending on different goals or ambitions the company possess: general, selective and ostensible. General would mean that the aim for demarketing would be to adjust to supply shortage whereas selective aims for supporting segmentation strategy. Finally, the main objective for ostensible demarketing would be to signal product scarcity.

Even though demarketing could be the way to go for promoting “consume less and more consciously”, as a strategy it can be seen also from the negative point of view in the terms of ethics. For instance, in the luxury markets there have been occasions where the company is using selective demarketing where it is used as a marketing strategy to specific segments. In such situations, the response to this strategy has not been positive since it is regarded as discriminating activity. (Kotler 1973 via Armstrong & Reich 2015). Another example is ostensible demarketing which is in the end trying to use scarcity as a signal for value which in turn is actually hoped to grow the demand in long-term. Again, if the “original” idea of demarketing was to suppress demand, using the ostensible demarketing as a strategy to grow the demand in long-term can be argued to be controversial. (Kotler 1973 via Armstrong & Reich (2015).

Green demarketing provides a theoretical foundation which can potentially be applied in the research of demarketing and sustainability while contributing to practical sustainable business practices. This strategy offers the company an opportunity in contributing to sustainability movement which can simultaneously attenuate ecological harm caused by demand and maintain profitability. Moreover, the demarketing message would benefit the society by encouraging the consumers to buy less and to choose products that will last longer and perform better. (Armstrong & Reich 2015).

There is already some evidence that if the companies want truly to embrace effective sustainability in their marketing, their messages need to aim for reducing the amount of consumption, hence green demarketing would be the right way to go. However, if the company wishes to implement this strategy, knowing their customers’ current perception of their brand is crucial. This perception will affect how consumers will respond to the company’s green demarketing message, whether it would have

positive or negative effect to the attitude about the product. The brand can try form the “right” customer perception by making conscious effort to take care of their environmental reputation keeping in mind to be sincere and transparent to avoid the negative effects similarly to green-wash. (Armstrong & Reich 2015).

Altogether, when reflecting all the attributes and beneficial aspects of green demarketing, it can provide a competitive advantage by communicating consumers that the company is addressing the sustainability issues of fashion industry and is trying to make a change in this matter. Linked to the idea of slow fashion talked about earlier, green demarketing is also aiming for slowing down the current way of produce and consume fashion and ultimately providing the message for consumers to consume less.

4 RESEARCH DESIGN AND IMPLEMENTATION

This chapter describes the design of this research: what research method has been applied in order to achieve the aim of this study. Furthermore, after the description of research method used, this chapter will discuss what type of data was used and how this data was collected and analysed. Thus, the chapter will provide all the needed information of how this study was conducted and which research methods were applied.

4.1 Research method

Regarding the purpose of this research and the aim for answering the two research questions defined earlier, the research method to be applied is content analysis. Content analysis is one of the most popular methods when it comes to studying the content of communication (Prasad 2008 via Zharekhina & Kubacki 2015). This seems to be the case especially in the area of mass media communication (Bryman & Bell 2007 via Gaur, Saransomrurtai & Herianto 2015) and more specifically in CSR communication (Lock & Seele 2015). In fact, content analysis has been used before in such studies aiming for defining commercial messages on the companies' websites and their level of CSR communication (Daechun 2007; Bach, Omazic & Zoroja 2015; Bravo, Matute & Pina 2012; Tang, Gallagher, Bie 2015; Zharekhina & Kubacki 2015).

Content analysis' specialty as a research method relies in its ability to "describe the characteristics and meanings of the communication" (Holsti 1969 via Gaur et al. 2015). It does so by converting qualitative items (e.g. texts, videos, websites) to numerical variables, providing the bases for analysis (Halliburton & Ziegfeld 2009). Moreover, as a method of analysis it provides several advantages such as ability to cope a large quantity of data and examining the artefact of communication itself instead of the individual (Krippendorff 1980 via Kim & Kuljis 2010).

Regarding the benefits of the content analysis and the link of using it as a method in CSR communication, it has been chosen as a suitable method of analysis for this study.

4.2 Data collection and analysis method

By choosing the content analysis as a suitable method, certain requirements for the preparation and organising phases were required. Firstly, there was a need to select a representative sample and unit of analysis. Secondly, data organising and coding method was needed which led to a creation of a coding scheme for this study.

4.2.1 Sampling and unit of analysis

To find the answers for the research questions defined earlier, two different sets of samples were selected for this study. The first set of samples is chosen to represent the current leading global fashion brands including those brands that are owned by the biggest fashion companies and groups of the apparel industry. This sample was taken from the report by Brand Finance which indicates the world's 50 most valuable apparel brands (Brand Finance 2018a). The valuation is based on Royalty Relief methodology which "determines the value a company would be willing to pay to license its brand as if it did not own it" (Brand Finance 2018b). For this study, top ten brands of this list were selected to represent the current leading brands of fashion industry.

However, there were a few modifications that had to be made for the Brand Finance (2018a) list. The interest of this study is in those fashion companies that are focused mainly on apparel (including clothing, shoes and handbags) and not jewelry, some of the top ten companies had to be excluded from the list. This meant leaving out companies like Cartier (jewelry) and Rolex (watches). This exclusion left some room to include two more companies coming next in the ranking that were suitable considering the criterion discussed earlier. Therefore, two following apparel brands on this listing were included to replace the excluded ones: Victoria's Secret and Burberry. The full list of this first sample is presented in Table 1.

Overall, six of the brands in this first set of samples are owned by the biggest fashion groups globally, including LVMH, Inditex, Kering, L Brands, H&M Group and Fast Retailing. The remaining brands are also among the biggest fashion companies in the world. Thus, by examining the ten brands chosen for this first set of samples, it gives a

good representation of what the leading fashion companies are currently doing regarding communicating sustainability issues.

It is important to note that by choosing the leading fashion companies as a set of sample represents simultaneously those brands that are in their earlier stages of sustainability and doing their business in more “traditional” way. In other words, this set of samples provides a representative sample of companies that do not necessarily have the sustainability issues in their very core business values (since founding the company) even if some efforts in this field have already been made. Thus, it would leave room for an interesting comparison between leading fashion companies and slow fashion companies which leads us to the second set of samples.

Table 1 Sample of leading fashion companies

Company	Group/Independent
Nike	Nike Inc.
H&M	H&M Group
Zara	Inditex
Adidas	Adidas Group
Hermès	Independent
Louis Vuitton	LVMH
Gucci	Kering
UNIQLO	Fast Retailing
Victrolia’s Secret	L Brands
Burberry	Independent

The second set of samples has been chosen to represent fashion brands that put high emphasis on sustainability issues and include them as the core interest of their business (referred to as slow fashion companies in this study). Since sustainable fashion as a concept remains undefined choosing the sample to represent this field is challenging. For the sake of this study, the key indicator for slow fashion is to include those brands that does not only offer one range of sustainable clothing but instead have the concept of sustainability in their core values, not only considering production. Keeping this indicator in mind, the sample selected to represent slow fashion brands is based on Fibertech Awards of Ethical Fashion Pioneers including ten brands that are promoting slow fashion approach while also “paving the way for

a more sustainable culture” (Fibertech 2018). Table 2 presents this second set of samples to represent slow fashion companies.

Table 2 Sample of slow fashion companies

Company
Everlane
Reformation
People Tree
Patagonia
PACT Apparel
Stella McCartney
ADAY
Raven & Lilly
Eileen Fisher
Cuyana

The data was collected by using the companies’ website as a unit of analysis. All the reports and documents linked in the website were included for the analysis. The main reason behind not only including the home page relies in the fact that all the fashion companies may not indicate their commitment to sustainability in that visible manner and so including all the possible content on the website (or linked to the website) enables to achieve more accurate overview of the level of communication. However, some limitations had to be made regarding the language of the content: all the other languages except English were excluded in order to keep coding coherent and comparable across different fashion companies. Additionally, websites including “news” section where all the most current information was shared (e.g. articles and announcements) were not included since their purpose is to give snapshots of current events rather than build an overall sustainability message. Therefore, these sections were not considered necessary to build the overall view of the main focus of the fashion company’s sustainability message.

4.2.2 Creating unstructured coding schemes

Achieving a successful content analysis requires sorting the data by “creating categories, concepts, model, conceptual system, or conceptual map (Elo, Kääriäinen,

Kanste, Pölkki, Utriainen & Kyngäs 2014). In other words, there is a need for a clear understanding how to make sense of the data collected and how to organise it for the analysis. For this study it meant creating two different coding schemes (one for each research question) based on the previous researches related to this topic. However, both coding schemes were unstructured in nature, leaving room for the possibility for the creation of new categories throughout the content analysis process (Elo & Kyngäs 2007).

Firstly, this study aims to investigate the leading and slow fashion companies' current level of communication in sustainability issues. Thus, for this first coding scheme, six sustainability topics of such issues were included based on previous research (Frostenson, Helin & Sandström 2011; Bach, Omazic & Zoroja 2015).

As the corporate responsibility communication reflects on company's rhetoric for a "ethical, social, environmental or philanthropic issues" (Frostenson et al. 2011) it can be used as a base for this study. Therefore, this coding scheme's categories (sustainability topics) are environment, social responsibility, community involvement and development, human rights, labour practices, and consumer issues (see Table 3.). Together these topics cover previously discussed issues regarding sustainability in fashion industry.

The second coding scheme supports the aim of this study to examine what types of sustainable marketing strategies can be identified among the leading and slow fashion companies. For this purpose, the focus was put on to three strategies in particular that were identified from the previous researches regarding sustainable marketing strategies in fashion (Zharekhina & Kubacki 2015; DeWitt & Dahlin 2009; Zaharia & Zaharia 2012; Armstrong & Reich 2015). These strategies are social marketing, green marketing and green demarketing, and so these strategies (see Table 4.) Each of them has their own distinctive core message based on the three approaches to promote sustainable consumption provided by Gardetti and Torres (2013).

The assessment used for each item in both of the coding schemes, was coding the items (sustainability topics or message communicated) by using dummy variable

(present or absent). This would mean assessing the content of a sample companies' websites to assess their level of communication in sustainability topics and whether or not is possible to identify socially responsible marketing strategies in their communication. Each of these items were either scored as 1 = present or 0 = absent depending on the outcome of content analysis of each website.

After choosing the sample and unit of analysis, in addition to establishing the coding scheme aligned with the purpose of this study, the analysis itself was ready to be established. The findings of the content analysis conducted will be discussed in the next chapter.

Table 3. Coding scheme I - sustainability issues communicated

Topic	Issues addressed	Source
Environment	Responsibility in relation to the quality of the product and/or the production process and/or to the natural environment	Frostensson, Helin & Sandström (2011)
Social responsibility	Responsibility in a more external social dimension, usually directed to the supply chain and to local communities	Frostensson et al. (2011)
Human rights	Responsibility in relation to human rights issues such as discrimination and vulnerable groups, civil and political rights, fundamental principles and right to work	Bach, Omazic & Zoroja (2015)
Community involvement and development	Responsibility to develop employment and skills as well as education and culture while creating wealth. Can be considered as social investment.	Bach et al. (2015)
Labour practices	Responsibility regarding to employment, working conditions and training at workplace	Bach et al. (2015)
Consumer issues	Responsibility to conduct fair marketing, fair contractual practices while protecting consumers' health and safety. Includes also issues such sustainable consumption, consumer data protection and privacy, and providing education and awareness	Bach et al. (2015)

Table 4. Coding scheme II - socially responsible marketing strategies

Strategic approach	Message communicated	Source
Social marketing	Either through empowering or patronising encouraging consumers to choose more responsible alternatives of fashion; “consume responsibly”	Zharekhina & Kubacki (2015); Gardetti & Torres (2013)
Green marketing	Educating consumers on environmental issues while encouraging to choose the more environmentally safe alternatives of fashion items; “consume differently”	DeWitt & Dahlin (2009); Zaharia & Zaharia (2012); Gardetti & Torres (2013)
Green demarketing	Educating on the issues related to the quantity of fashion consumption; encouraging not to buy or to make less frequent but conscious fashion choices; “consume less”	Armstrong & Reich (2015); Gardetti & Torres (2013)

5 FINDINGS OF THE CONTENT ANALYSIS

This chapter is dedicated to the discussion of content analysis of fashion companies' sustainability communication on their websites. Firstly, the analysis will provide findings of which sustainability issues were most commonly communicated while also addressing the similarities and differences that can be identified between leading and slow fashion companies. The second part of the analysis provides the insights of different strategic choices that could be identified regarding the fashion companies' socially responsible marketing messages. This part of analysis also includes discussion of differences and similarities in these marketing messages between leading and slow fashion companies.

5.1 Sustainability issues communicated

The first part of the findings of this study includes the analysis of sustainability issues communicated; which sustainability issues were most commonly addressed and how widely these different issues were covered. For this purpose, the analysis followed the coding scheme I presented earlier in this study, covering the following sustainability topics: environment, social responsibility, human rights, community involvement and development, labour practices, and consumer issues.

As the analysis was conducted, some sub-categories were identified for each of these topics in order to facilitate the analysis process and to give some more specific definitions for each topic. In addition, a general category was also added, including topics identified throughout the analysis process which did not fit to the categories of the original coding scheme. More importantly, the added general category and topic related sub-categories were all helping to give better understanding in the level of fashion companies' sustainability communication. The frequencies for each of the sustainability topics can be found in appendices (see Appendix 1 and Appendix 2).

5.2 General category – visibility, vision and reporting sustainability

The added general category addresses the issues such as how feasibly the sustainability information was found (visibility), how clearly the strategic goals were defined by the fashion companies when it comes to sustainability (vision), and how structured and transparent their communication is (sustainability report). All of these added sub-categories covering general sustainability issues supported the analysis by giving a good indicator how the sustainability issues were emphasised on the fashion companies' websites.

5.2.1 Visibility

Firstly, considering the visibility meant taking a look whether the sustainability content was easily “one click away” on the brand's homepage or not. The placement of this content indicates how important role these issues play in the brand's communication and how reachable this content is. As stated before in this study, consumers do not want to dedicate a lot of time trying to figure out the company's sustainability practices, so the placement of such information can be crucial. Therefore, the main criterion for this visibility category was to have the direct link to sustainability content on brand's website without first going through the overall company's information in order to find sustainability related topics.

When it comes to bigger fashion groups, usually the sustainability content in detailed manner was only provided on the group's website instead of the individual brand's homepage. The only exception of these companies was Gucci which had dedicated sustainability section on its own website as well, called “Gucci Equilibrium”. In fact, sustainability issues were even more broadly emphasised on Gucci's website, compared to the website of its parent company, Kering. Additionally, they even had their own sustainability approach to “bring the very best quality to our customers, while maintaining positive environmental and social impact”.

More generally, all the leading fashion companies had a separate section provided on their website promoting their sustainability activities. However, there were major differences on the broadness of this section and how visibly it was placed. As a

result, 4/10 of the leading fashion companies did not have direct easy access to the sustainability topics including Adidas, Louis Vuitton, Zara and Victoria's Secret. In all of these companies' websites, the sustainability related content required more than one click mainly through first through brand's own website and from there navigating on the group's website.

In the case of slow fashion companies, the amount of companies that have dedicated, easily accessible and visible section for sustainability remained the same as for leading fashion companies. However, there was a huge difference in the nature of the placement of sustainability topics on their website; in most cases, slow fashion companies have simply integrated the sustainability related topics in their company's "About us" section giving it no separation from any other company related topics. This type of placement of the sustainability content increase the chances of giving the consumers the impression that sustainability is their "natural" part of doing business rather than separately handled issue.

5.2.2 Vision

Next up in the general category was to analyse the vision and goals regarding sustainability. The criteria for this sub-category was having really defined and measurable goals rather than just general overall commitments. Therefore, this would better indicate the level of commitment and actionable plans made towards becoming more sustainable business rather than just stating that "we are responsible business".

Keeping this criterion in mind, the findings of the analysis indicate that almost all of the leading fashion companies (7/10) had some well-defined strategic goals when it comes to sustainability. The goals were usually set up for a specific year and divided into few strategic priorities. For example, Adidas has defined its own "Sustainability Roadmap for 2020", including priorities for product (water, materials & processes, energy) and people (empowering, health, inspire action) and each of these priorities have a specific target to be achieved. Some leading fashion companies also provided outstanding bold statements in their sustainability visions. For instance, H&M targets for 2020 to have a climate positive value chain while being "100% leading the change" towards more sustainable fashion industry whereas Zara is committed to no

longer sending anything to landfills by 2020. As for Nike their ambition is “to double business while cutting environmental impact in half”.

On the other end, there were three leading fashion companies (Hermès, UNIQLO, Victoria’s Secret) that did not communicate any specific measurable sustainability goals at all. Still, they had stated, on more general level, either a mission, vision or commitment to improve the sustainability of their businesses. For instance, UNIQLO has a vision of “unlocking the power of clothing” aiming to make clothing produced in environmentally friendly way with respect of human rights that enriches the lives of those who wear them. Yet, their vision is not combined with any specific targets, leaving the consumers and other stakeholders no more than their communicated promise to “always work toward better, more sustainable society”.

The slow fashion however performed worse in having measurable sustainability goals communicated since only three of them have combined their sustainability visions with at least some level of numeric targets. As an example, Eileen Fisher has its ideology of “business as a movement” meaning daily efforts to keep going in the right direction but their sole clearly measurable goal communicated is to use only organic linen by 2020. The most detailed sustainability goals among the slow fashion companies was founded in the communication of Reformation. As they are communicating to “put sustainability at the core of everything we do”, they have mapped out specific sustainability related goals and programs for the years 2019-2023. This mapping has broad spectrum of areas for actions including people, product, planet and progress.

For the rest of the slow fashion companies, they all communicate a vision or mission including some level of commitment to the sustainability. Thus, similarly to leading fashion companies, even if there’s no specific measurements or set goals when it comes to sustainability practices, at least the vision is there. What is different compared to leading fashion companies however is that the slow fashion companies do not separate their overall mission as a company from their sustainability mission. For instance, People tree states believing that “fashion can be used as a tool for sustainable development, protecting people and planet” while Cuyana’s mission as a company is to “impact beyond creating beautiful apparel and accessories”.

Even bolder statements of integrated sustainability missions are on Stella McCartney's and Patagonia's strategic visions. Stella McCartney communicates strongly its desire to completely reimagine the fashion industry while committed to operate as a responsible business. On their website they state being the "agents of change" meaning that they "challenge and push boundaries to make luxurious products in a way that is fit for the world we live in today and in future: beautiful and sustainable".

Patagonia steps even further with their sustainability mission. They declare that "the protection and preservation of the environment isn't what we do after hours. It's the reason we're in business and every day's work" giving a clear message that sustainability issues are not handled separately but instead in really integrated manner. Moreover, their mission statement is "we're in business to save our planet" by building the best products with no unnecessary harm caused while using their business to inspire and implement solutions to help solve the environmental crisis. But as stated earlier, even though Stella McCartney and Patagonia both have really inspiring sustainability visions and missions, they both are missing communication of specific measurements to achieve these missions.

5.2.3 Sustainability Report

Lastly in the general category of the coding scheme is sustainability report. This could mean either integrating sustainability issues in the company's Annual Reporting or providing a separate document dedicated only to the company's actions and strategies towards sustainability. For the leading fashion companies, in most of the cases the reporting of sustainability progress was handled through Annual reporting and almost all of these companies provide sustainability reporting (except Victoria's Secret). Even Hermès interestingly provided a sustainability related information in their Annual Report regardless of the fact that they do not have any specific sustainability goals communicated on their website otherwise.

For the slow fashion companies, there was only three companies (Reformation, Patagonia and Eileen Fisher) providing any form of sustainable reporting. Of course, the reporting for smaller businesses is not that "expected" since the disclosure of

formal public Annual Reporting is not legally required from them. Still, this does not mean that the smaller companies could not have their own reporting system as well, like in the case of Reformation. They provide quarterly sustainability report giving the information of their specific sustainability goals, progress and challenges as well as what are the actions anticipated for each of them in the future. They see reporting sustainability efforts as a part of their responsibility regardless of the fact that being a smaller company, declaring “companies should be accountable for more than just profits”. Additionally, Reformation states that they want to provide their quarterly reports in order to “track our progress together” showing the willingness to be held accountable for their efforts.

As another example, Patagonia has their own ebook called “Environmental & Social Initiatives” to provide information of their efforts made throughout the year regarding environmental and social issues and to “prove that doing business and protecting planet is possible”. This ebook is more “unofficial” way to report the progress since it’s more unstructured and more in a form of storytelling about their programs and participation for doing good. Yet the even more interesting way to report transparently their sustainability efforts Patagonia (as well as Eileen Fisher) has made a legal commitment to advance public benefit by being registered as Benefit Corporation. Alongside their commitment to high standards of purpose, transparency and accountability, this legal commitment requires providing an annual Benefit Report which is quite structured in nature.

5.3 Environment

The second category in the coding scheme was the environment. During the content analysis, the following topics were identified as subcategories related to the environmental issues: circular economy, ecological footprint, materials, transportation, facilities, microfibers and offsets.

5.3.1 Circular economy

First up in the environment category of the coding scheme was to analyses whether or not the fashion company had made a commitment to implement the idea of

circular economy in their business practices. The criteria for this category was to have a clear statement of having circular economy as a part of the company's commitments, strategic vision or actions.

To support their efforts to move towards circular economy, many companies analysed in this study have partnered with initiatives such as Ellen MacArthur Foundation or Global Fashion Agenda. This would require the fashion companies transforming the current industrial models by moving away from consumption of finite resources and completely eliminating the waste out of the system. (Ellen MacArthur Foundation 2019b; Global Fashion Agenda 2019). In the case of Ellen MacArthur Foundation, there is a whole dedicated initiative regarding specifically fashion industry, called "Make Fashion Circular" to drive the collaboration between industry leaders and key stakeholders with an ambition is to "ensure clothes are made from safe and renewable materials, new business models increase their use, and old clothes are turned into new" (Ellen MacArthur Foundation 2019a).

A total of 6/10 leading fashion companies who communicate their commitment to circular economy are all in fact part of the Ellen MacArthur Foundation's initiative and, apart from Burberry, they also have signed the commitment for Fashion Agenda's Circular Fashion Commitment. But the level of emphasising the participation in this initiative varies a lot. For instance, Adidas and Zara are simply just mentioning that they are moving towards circular economy without any more information provided (e.g. actions taken, more information about the concept).

The leading fashion companies that do put much more emphasis to communicate their participation in circular economy are Burberry, H&M and Gucci. These companies provide more in-depth description the overall idea behind this concept while also providing some examples of actions they have taken to implement it. For instance, Burberry donates its leather offcuts to a sustainable luxury company which in turn transforms waste material into lifestyle accessories. For H&M, the circular economy concept is integrated as part of their overall sustainability strategy; to become 100% circular and renewable.

The number of slow fashion companies committed to circular economy was far lower, since only three companies in total have clearly stated their efforts to adapt this concept. Out of these three companies, Stella McCartney and Reformation have also joined to be part of “Make Fashion Circular” initiative to support this systemic shift within their industry. As for Eileen Fisher (and for Reformation as well), they have signed Global Fashion Agenda’s “2020 Circular Fashion System Commitment” keeping them accountable to take actions, in implementing a circular design model, collecting and reselling used garments, and creating new garments from post-consumer waste. Overall, the representation of slow fashion companies addressing the issue of circular economy remains remarkably poor compared to the leading fashion companies.

5.3.2 Ecological footprint

As for ecological footprint, the companies were analysed by their efforts regarding estimating the ecological footprint of their operations. This would require clearly mentioning their actions and methods taken in order to achieve numeric evaluations of their impact on the environment.

Only two of the leading fashion companies had made estimations to measure their ecological footprint: Nike and Gucci. Nike states that they have developed a specific analytical tool to estimate their ecological footprint throughout their value chain and they share their results in the Sustainable Business Report. They have even created an interactive visualization tool on their website to demonstrate the impact of their value chain in terms of carbon and water footprint.

As for Gucci, they have even more transparent and innovative method in estimating their environmental impact thanks to their own EP&L (environmental profit & loss) tool created by their parent company, Kering. EP&L is aiming to make their impact visible by measuring the carbon emissions, air and water pollution, water consumption, waste disposal, and land use in their own operations and throughout the whole supply chain. According to Gucci, this tool is “a key enabler of a sustainable business model” and they are hoping to share this method with the other businesses as well. Not only they are using EP&L to communicate their impact for

other stakeholders, but they are also using its measurement to help them making better business decision regarding the sustainability of their operations.

As for slow fashion companies, there was not that much communicated effort in estimating ecological footprint, giving the total of three companies doing so: Stella McCartney, Reformation and Patagonia. Stella McCartney is actually using the same EP&L tool as Gucci to measure and understand their impact. Patagonia and Reformation on the other hand have developed their own systems for tracking their environmental footprint. Patagonia measures their carbon footprint and they have their own internal quality scorecard to rate the quality of their products, including the aspect of environmental harm caused. Taking a step further, they provide information regarding the assessment of each material they use in their products. Moreover, they disclose information about all the resources needed to produce their best seller jacket with a message that “this jacket comes with an environmental cost higher than price”.

Reformation calls their own environmental impact tracking system as Refscale which adds up the carbon dioxide emitted, gallons of water used, and pounds of waste generated. The results of their Refscale method are used to compare “how Reformation’s products help reduce these impacts compared with most clothes bought in the U.S”. Plus, this information is shared on their website for each and every single product, helping the consumers to make more conscious choices. In this way Reformation as well as consumers can benefit from having the access to Refscale results in order to better understand the impacts of fashion (and how to possibly make this impact more positive). Lastly, Reformation provides information regarding their “totals” meaning that they disclose the totals for all the resources used and saved within their operations on yearly basis.

To conclude, both leading and slow fashion companies show a low level of communication of their ecological impact in a measurable term. This can be partly due to the fact that the fashion supply chains are very complex. Therefore, it can be really challenging to track this impact even if the company would be willing to do so. That is why it is important to have some tools enabling estimations as some of the fashion companies have already shown such efforts in tracking their impact.

5.3.3 Materials

A requirement for this subcategory was that the fashion company's communication had in-depth descriptions either regarding the preferred materials the company uses in their products, defined sourcing policies and/ or the efforts of innovating their own sustainable materials. This is an important category to consider since, as Reformation states on their website, "up to 2/3 of the sustainability impact of fashion happens at a raw materials stage" therefore affecting on how the garment is washed and possibly recycled, contributing to a great environmental impact. As Hermès states on their website, it is their duty to "ensure sustainable and responsible use of the planet's resources by preserving, protecting, promoting, tracing, certifying, optimizing, and recycling them".

For both leading and slow fashion companies, there was one company not communicating in detailed manner their sourcing policies or material descriptions: Louis Vuitton (leading fashion company) and Cuyana (slow fashion company). Regarding the companies that do communicate in-detail about their materials, this would usually mean stating general targets and ambitious when it comes to their sourcing practices. For instance, Stella McCartney's vision is to source "as many sustainable materials as possible" whereas Raven + Lily aims to "source local, natural, and eco-friendly and use recycled, low-energy, waste-reducing or organic materials". However, there were some really specific goals communicated related to materials. For instance, H&M is aiming for having 100% of their raw materials recycled or sustainably sourced by 2030 whereas Eileen Fisher is completely shifting to 100% organic cotton by 2020.

The most common materials referred to in both leading and slow fashion companies were the usage of cotton, cellulosic fibers (viscose, lyocell, modal), wool, and oil-based fibers (polyester, polyamide). Some of the companies even disclosed information of the positive and negative qualities for each material (e.g. H&M, UNIQLO, Gucci, People Tree) including the possible actions and strategies to increase or decrease the usage of certain fiber. Cotton was by far the most referred and detailed raw material combined with the aim for using more (or only) organic or recycled cotton. Additionally, many fashion companies had signed a pledge to not

accept any cotton originating from Uzbekistan, Turkmenistan or Syria until the ethical issues regarding its farming is solved within these areas. For the cellulosic-based fibers, many companies had committed to use TENCEL branded lyocell fibers which are derived from sustainable wood sources therefore protecting the endangered forests.

In order to ensure that the responsibility of sustainable sourcing is followed, some of the fashion companies have created their own rating system for materials. As discussed before, Reformation has developed their own Refscale method which have enabled them to create their own standards and classification system considering the impacts of each material. Nike has also created a similar ranking system on their own, called “the Materials Sustainability Index” (MSI). For Nike, this index plays an important role in making better decisions in choosing the materials since, as they state on their website, they are using more than 16,000 materials in their products on yearly basis, giving a one pair of shoes up to 30 different materials. This is a good indicator how high the impact of choosing the right material may have in sustainability of the products.

Additionally, there were a few companies communicating their efforts in creating new innovative sustainable materials. Nike have created their own material with “Flyknit” technology which utilizes the recycled polyester originating from used plastic bottles. Another company upcycling water bottles is ADAY which also has its own custom fabric, Recycled Scuba. Furthermore, ADAY states that as they grow, they will be using more and more recycled and regenerated fabrics which they are already utilizing in many of their pieces at the moment.

In conclusion for the materials topics, leading and slow fashion companies both have the same rate of commitment since in both samples 9/10 companies in total communicated their visions or actions to improve their sourcing of materials. Interestingly, there was not that much of a difference in the level of disclosing the information between leading and slow fashion companies. Both samples had quite detailed information regarding the environmental and social impacts of different materials and they even seemed to have very similar action plans to achieve

sustainable sourcing practices, for instance choosing the organic cotton, using TENCEL lyocell, and sourcing more recycled materials.

5.3.4 Transportation and facilities

Next up for the environment category are transportation and facilities. Transportation category is defined as communicating the preferred modes of transportation and/or the product packaging used for transporting fashion items (either to stores or to customers). Facilities (e.g. stores, offices, distribution centers) includes the communication efforts regarding using renewable energy, eco-efficient lightning and/or encouraging employees to use more environmentally friendly solutions for employee transportation. As H&M states on their website, transport “represents around 6% of the greenhouse gas emissions in garment’s lifecycle” giving the importance to choose right modes of transportation in order to minimize the impact.

Among the fashion companies analysed in this study, four leading fashion companies and only two of slow fashion companies communicated this issue either by sharing the preferred modes of transportation (H&M, Victoria’s Secret), showing the efforts to increase density of shipments (Zara), minimising the transportation by choosing to produce locally (Eileen Fisher, Reformation) or by having the more sustainable packaging solutions for finalized products (Reformation, Gucci). The most distinctive solution to minimize transportation is communicated by Eileen Fisher. They created a local supply chain in Peru so they can have manufacturing close to the sources of their materials (organic cotton and alpaca) while also manufacturing more locally when feasible. In fact, 25% of their products are manufactured in New York and California and they are making efforts to sustain local manufacturing by importing fabrics to U.S.

Similarly, Reformation has also made efforts to minimize their impact of transportation by sourcing locally when possible. They are doing over 80% of required cutting and sewing in Los Angeles and the majority of their manufacturing is done in their own factory, located also in Los Angeles. Moreover, Reformation uses plastic-free packaging to deliver their products to consumers by utilizing compostable bags.

For facilities, there was much bigger difference in the level of communication between leading and slow fashion companies. All the other leading fashion companies except UNIQLO and Burberry communicated efforts to minimise the environmental impact of their facilities whereas only four slow fashion companies disclosed similar efforts.

Most frequently addressed issue among leading fashion companies in this category was the efforts to reduce the emissions of their facilities by choosing more eco-efficient lightning solutions or by switching to use renewable energy. Some of the companies are even making estimations in their carbon footprint (for instance Patagonia) by measuring the emissions of their offices, stores, and distribution centers. Moreover, companies like Victoria's Secret, Gucci, and Reformation are showing efforts to recycle the waste from their facilities. Victoria's Secret sends all the waste from their headquarter to recovery facility whereas Reformation aims for zero waste by recycling their garbage. As for Gucci, they are committed to minimise the food waste in their own canteens by collaborating with local charity organisations.

Taking a step even further, Eileen Fisher aims for having its retail and office spaces located in U.S to be not just climate neutral, but climate positive by 2020. Other innovative solutions regarding the sustainability efforts of facilities were providing carpooling service for workers (Gucci), offering metro passes for employees working in headquarters (Reformation) and giving monetary incentive when choosing carpool, bike, skateboard, or public transport instead of driving solo at work (Patagonia).

To conclude, transportation as a category did not reveal a big difference between leading and slow fashion companies. Given that this was not that highly addressed issue in general, there was not that much innovative solutions or in-depth communication for this topic. Thus, the communication remained more or less just as the statements of committing to minimize the emissions by choosing the most sustainable mode of transport. There were few exceptions however, mainly by the slow fashion companies, addressing the issue of choosing the location for manufacturing which in turn will affect the transportation needed.

As for facilities, the difference was very remarkable. Leading fashion companies had very widely communicated this issue (8/10) whereas only four slow fashion companies communicated actions to minimize their facilities' environmental impact. However, for many leading fashion companies this meant mostly just "switching the lightbulbs" meaning to reduce the carbon emissions by having eco-efficient lighting or some suggesting using the renewable energy. More innovative solutions to achieve overall more sustainable offices, stores, and distribution centers were recycling waste and promoting other means of employee transport.

5.3.5 Microfibers

For this category, the analysis focused on whether or not the fashion company communicates the problem of microfibers shedding from synthetic materials (e.g. polyester) when the clothing is washed (which leads to plastic pollution in the oceans). Patagonia is raising this issue on their website by stating the only way the problem of microfibers can be tackled is that "our consumption behavior needs to change radically: new materials that don't shed need to be developed, washing machines need to include filters to capture fibers and waste treatment plants need to be updated" basically highlighting the need for shared responsibility.

The leading fashion companies taking part in this challenge of tackling this issue are H&M and Adidas. H&M is participating in MindShed project which aims for helping the fashion industry to come up with design solutions that do not contribute to the problem of microfibers shedding. Adidas on the other hand has communicated the basic problems regarding this issue and they are committed to creating awareness and trying to come up with a solution for this problem.

As for slow fashion companies, three companies addressed this issue: Patagonia, Reformation and ADAY. All of these companies are offering on their website a washing bag called "Guppyfriend" which can be used as a solution to filter the microfibers from synthetic materials when washing the clothes. Additionally, Reformation is using recycled synthetics to lessen their environmental impact, but as they state on their website, even the recycled synthetic will shed microfibers

(although much less) and therefore they are working on to eventually phase out all synthetics.

For Patagonia, they are committed to dig deeper in the issue of microfibers by committing to putting their efforts to learn more about it and to discover what they can do to possibly find solutions for it. They are sharing their current knowledge as they are “taking more active role in educating our customers about what we’ve learned so far about microfibers entering the ocean – and most importantly, what they can do to help right know”.

Since the issue of microfibers can be regarded as quite a new topic in the sustainability of fashion, there was a lack of both leading and slow fashion companies communicating this issue. Few leading fashion companies have at least communicated the basic facts regarding the microfibers shedding, thus showing their awareness of this issue and sharing it to their customers as well. As for slow fashion companies, even though there was not that many of them raising this issue, there was a little bit more action communicated to at least minimise this problem. This was done by providing filtering washing bag or phasing out eventually the synthetics fabrics causing this problem in the first place. Overall, this is the topic that would be probably more addressed in the future, once the research goes further and this issue is more widely and better understood.

5.3.6 Offsets

Lastly for the environmental category was to analyse if the fashion company communicates the commitment of buying offsets in order to “cover” their emissions of transportation or other business operations. This category was not communicated at all among leading fashion companies. Instead 4/10 slow fashion companies have made such commitments to offset their emissions including Reformation, Stella McCartney, Raven + Lily, and Eileen Fisher.

For Reformation, buying offsets means investing in programs to protect Amazon Rainforest from deforestation, contribute freshwater to dewatered rivers and wetlands, and to purchase landfill gas in exchange for the total emissions, water and

waste they have contributed. Other companies are purchasing offsets from REDD+ (Stella McCartney), Wildlife Works (Raven + Lily) and NativeEnergy (Eileen Fisher) in exchange for their carbon emissions.

The most interesting effort however is the Reformation's solutions to "calculate the carbon footprint on their web server and customers' screen's energy demand while browsing the Ref website" which they are offsetting too. Due to their offset purchases, they are stating of being "100% carbon, water and waste neutral" which is a quite bold statement coming from a fashion company. Plus, they even have programs that will help the consumers participate in reducing their footprint by purchasing climate credits (carbon offsets) on Reformation's website as well as giving their customers 100\$ store credit if they make a switch to use wind energy.

As purchasing the offsets remains a newer issue similarly to microfibers, there was not that wide selection of companies communicating this topic. Clearly, the slow fashion companies were more ahead since no leading fashion company communicated for offsetting their emissions at all.

5.4 Social responsibility

The aspects of social responsibility in this study's content analysis included two sub-categories: philanthropies and transparency. Philanthropies category basically observed the fashion company's communication regarding possible donations to NGO's or funding the projects that are aiming for making a positive impact on communities and the environment. However, this definition excluded collecting and donating used clothing since take-back programs were handled in completely separate independent category which will be discussed later.

As for transparency, the analysis was focused on communication about providing transparently information where the fashion companies' production takes place (supplier list or map) or providing other means of increasing the transparency in the light of production practices.

5.4.1 Philanthropies

The communication regarding philanthropies in this study was usually communicated as either continuous partnership (e.g. yearly donations of fixed proportion of revenues) or collaborative projects with a specific timeframe (e.g. Black Friday, Earth Day) usually with nonprofit organizations. Some fashion companies have also set up their own foundations through which they can support causes that they find important in creating a positive impact. Philanthropies as a topic was extremely embraced by leading fashion companies: every single leading fashion company give donations or fund the projects as part of their approach of being responsible and sustainable business.

However, the level of communicating philanthropies varied a lot between leading fashion companies. Some companies had chosen to support a very specific “genre” of causes. For instance, Louis Vuitton highlighted their participation in yearly fundraising dinner to support the fight against sickle cell anemia as their philanthropic effort. As for Victoria’s Secret, they mainly focus on supporting causes to research and raise awareness about breast cancer and to help the victims of natural disasters. On the other side of the spectrum, Zara have supported over 409 different nonprofit organizations whereas H&M have aligned their philanthropic efforts with United Nations SDGs, supporting causes such as providing access to clean water and sanitation, advocate quality education for children, and to ensure good living conditions by protecting the planet.

As for the slow fashion companies, communicating philanthropies was not as evident but still 8/10 had stated supporting causes that have a positive impact. Also, for slow fashion companies the nature and level of causes supported varied a lot. There were some efforts shown for giving donations on some specific time and place. For instance, Everlane donates their Black Friday profits to improve the lives of the people working in their factories and Reformation celebrates its staff birthdays by giving donations to TreePeople which in turn plants a tree in their name. And then there were the companies that did provide more continuous support for causes they find important. For example, Raven + Lily helps funding microloans to female entrepreneurs in their local communities for every purchase made.

By far the most outstanding philanthropic effort is Patagonia's continuous way of giving back: at least 1 percent of their sales goes to help grassroots organizations that aim for creating a positive change for the planet. They call this 1 percent as their "Earth Tax" that needs to be paid in order to "address the causes, and not just symptoms of global warming". Through supporting the smaller organizations, they can "protect what's irreplaceable". By paying a yearly Earth Tax, Patagonia has supported over 3400 grassroots environmental groups and donated over \$89 million since starting this commitment in 1985. More importantly, they are now encouraging other businesses to join their "1% for planet" movement to help funding the smaller environmental organizations making a change in their communities.

Again, there were big differences between both leading and slow fashion companies regarding the level of their communication of philanthropies. All the leading fashion companies support in one way or another some nonprofit organizations and projects varying from focused causes to more general targets (e.g. United Nations SDGs). Another distinctive difference was the notion of having the donations tied up to specific event or more ongoing process of donating a certain proportion of profits to good causes.

5.4.2 Transparency

Both leading and slow fashion companies performed quite similarly in the category of transparency since 6/10 leading fashion companies communicated this issue and 7/10 of slow fashion companies. Hence, the difference was barely there given not that much difference how widely this topic was accepted. Instead, there were two different approaches found to deal with this topic of transparency which in turn led to some differences in the nature of communication.

Firstly, there were both leading and slow fashion companies that were emphasizing that they utilize craftsmanship and artisanal work in their production. This approach also included highlighting the stories of the people making their products. This was the case especially in the communication of Burberry, Hermès and Gucci (leading fashion companies) as well as People Tree, Raven + Lily and Cuyana (slow fashion companies). These companies approached transparency more in a storytelling way by

personalizing the makers of their products and emphasising their long-term relationships with these suppliers. Additionally, they highlighted the importance of their participation in preserving the traditional skills of artisans.

The other way to address the issue of transparency was to provide a list (e.g. Patagonia) or visualization tool (e.g. an interactive map on Nike's website) to disclose detailed information regarding where the fashion items are produced. Usually such information included the location either on the country or city level, number of employees working in that factory, and which stage of production the factory participates in (e.g. finished goods or only part of the product). Everlane even discloses the information what are the materials used, who is the owner, and how they began their partnership for each specific factory.

ADAY goes even deeper in their transparency communication by sharing the information of the impact of each mill they are using (e.g. are they using, programs for recycling and reusing materials, tools to purify water). As for Reformation, they have even built their own sustainable factory in Los Angeles in order to ensure good working conditions and fair living wage for those who produce their clothes. Additionally, their increased efforts for transparency includes providing the public a chance to visit their factory and meet the people behind their clothes.

Lastly to mention as a very interesting approach to transparency is Everlane's mission that they call "radical transparency". They are not only disclosing really transparently each of their factories used but additionally they are using the approach of radical transparency to share the true cost of each and every product they make. The true cost is communicated as the cost of materials, labour, duties, and hardware giving their added markup they use to form their final price. Plus, they are even providing a comparison between the true cost, their price and traditional price for each product category. For Everlane, this is an important part of their communication as they believe that their customers "have a right to know how much their clothes cost to make". Plus, they disclose the fact that an average retailer usually puts 6-5x markups on their products while Everlane uses only 2-3x as their markup.

To conclude the category of transparency, there was not that much of a difference in the way of addressing this issue between leading and slow fashion companies although there was just a slight difference in the number of total companies addressing this topic. Additionally, two different approaches were identified, being either focusing on craftsmanship (highlighting the long-term relationships with artisans through storytelling) or providing a list or map of basic information (mainly the location of factory or the supplier). Yet again, the companies embracing this issue in the most distinctive manner were all slow fashion companies. This included disclosing the relationship with each factory and being completely transparent with the pricing (Everlane), the impact what they have (ADAY) and providing visits in the factory built to ensure ethical production practices (Reformation).

5.5 Human rights

One subcategory was identified to guide the content analysis of communicating human rights on the fashion companies' websites, namely equality, diversity and inclusion. The only criterion for this subcategory was that just mentioning "we are making efforts to support equality in our workplace" was not enough. Instead, the company's communication had to reveal stronger emphasis on such issues and commitment to human rights by taking actions as well.

5.5.1 Equality, diversity and inclusion

The difference between leading and slow fashion companies' communication of commitment to equality, diversity and inclusion is really evident. Almost every single leading fashion company (except Hermès) had a really strong emphasis on such issues whereas only four slow fashion companies communicated a similar strong commitment (Reformation, People Tree, Raven + Lily, Eileen Fisher, Reformation).

For leading fashion companies, their communication of such issues were usually more general commitments, sometimes followed by a specific action plan. For example, Victoria's Secret aims to "understand, appreciate and leverage diversity" by focusing on recruiting, retaining and advancing diverse talent. Nike on the other

hand promotes diversity and inclusion by holding their leaders accountable to increase representation, invest in diverse talents, invest in inclusive hiring, and establishing accelerated training for managers.

There were also fashion companies that focused their efforts of this issue by disclosing the information of their total number of female workers (gender ratio), share of women holding a leadership positions, or by showing the differences in the pay for women and men. This information was communicated, for instance, on the websites of Adidas and Nike as a part of their inclusion and diversity efforts. Reformation has also disclosed the information regarding the management positions of women in their company (or people from underrepresented populations in general), thus taking a similar approach. In the case of Louis Vuitton on the other hand, they have completely sperate program called “EllesVMH” showing their commitment and dedication in promoting gender diversity in their company. As another interesting example, UNIQLO approaches the issue of inclusion by supporting underrepresented populations through employment of refugees and people with disabilities.

The communication of this topic by slow fashion companies was mostly focused around supporting women and girls by paying fair living wages. People Tree have partnered with Assisi Garments in order to support economically disadvantaged women by helping to pay fair living wages while Eileen Fisher has a program called “Women-Owned Businesses” funding women-owned and -led businesses. One interesting effort to empower women employment while also ensuring livable wage and to break the cycle of poverty is communicated by Raven + Lily: they let their partners set the price for the final products.

All in all, the diversity, inclusion and equality were much more emphasised on the leading fashion companies’ communication, given that in total of 9/10 companies addressed this topic while only four slow fashion companies had done the same. Leading fashion companies had stated more general visions to promote these issues. In some cases, they have included actionable plans and/or provided specific numbers of their efforts. For the slow fashion companies, this topic was mostly handled by promoting and supporting women and girls. Their focus was especially on giving a

fair living income for women. As a highlight of this topic, UNIQLO has its own targets regarding providing work for refugees and people with disabilities which remains as the most distinctive effort among all the fashion companies.

5.6 Community involvement and development

As for community involvement and development, there was one subcategory identified through content analysis: volunteering. This refers to fashion companies' communication on encouraging and supporting their employees to volunteer and give their time to support their local communities.

5.6.1 Volunteering

Four leading fashion companies and three slow fashion companies communicated volunteering opportunities of their employees. Thus, the difference in the number of companies addressing this issue was not that big while similarly the means of doing so was not any different.

Among the leading fashion companies, four companies communicated their encouragement for volunteering. Gucci empowers their employees to “dedicate 1% of their working time, between 2 and 4 paid work days for volunteering” in order to support equality, refugees, homeless, education, and environment. Burberry is also offering up to three working days per year for their employees to volunteer since they believe this will not only benefit the communities but also “enhances workplace skills, build community connection and contributes to employee motivation and personal fulfilment”.

As for slow fashion companies Reformation, Patagonia and Eileen Fisher, were also communicating their different means to support and encourage volunteering. Eileen Fisher has its own dedicated volunteering program called “Good Company” supporting and encouraging different community service projects while Reformation is offering incentives by providing their employees one paid day per month that they can dedicate to volunteering.

The most creative effort is provided by Patagonia. They give their employees an opportunity to support environmental work through their environmental internship program. This means that Patagonia employees work up to 320 hours for nonprofit groups while still receiving their full pay and benefits. As they mention, the importance of this program is of course providing the grassroots groups a free employee but also their employee will then “bring back stories, inspiration and new commitment to our environmental mission” showing the wide benefits that volunteering may provide for the community development.

As a conclusion for this subcategory, volunteering was not that widely embraced topic neither among leading fashion companies (4/10) nor slow fashion companies (3/10). Still, these few examples provide interesting insights of possibilities to take part in community involvement and development which in turn, as Burberry and Patagonia state, can turned out to be beneficial for the company itself too.

5.7 Labour practices

In this category, two different subcategories were identified. First of them is called training suppliers, referring to fashion company’s effort in providing training to their suppliers about sustainability (e.g. sustainable farming, sustainable production). For working conditions, the criterion was that fashion company has to disclose their commitment to follow guidelines promoting ethical working conditions (e.g. International Labour Organization’s Better Work, United Nations Global Compact or Fair Trade).

5.7.1 Training suppliers and working conditions

Providing training to suppliers was quite widely communicated issue among the fashion companies analysed. Among leading fashion companies, 8/10 in total communicated these efforts whereas for slow fashion companies the number was slightly lower, 6/10.

For leading fashion companies such as Hermès, Gucci, and Burberry, the focus on this category was put into passing along the know-how and developing the skills of

artisans. For instance, Hermès has its own workshops and initiative called “Leather School” aiming for the transmission of the traditional skills supporting craftsmanship while Gucci has a similar mentoring program similarly aiming for enhancing creativity and transferring the skills of artisans.

Also, a few slow fashion companies had the same approach on this issue: to pass on the artisanal know-how (e.g. People Tree). On a more general level, Patagonia is providing resources and information for any businesses willing to move towards green business practices whereas Eileen Fisher has more specific goal with the training of their Chinese factory: to eliminate root causes of human trafficking and slavery in their supply chain. As for People Tree, they have an independent foundation to bring benefits to farmers and artisans while also raising awareness for fair and sustainable fashion.

Working conditions as a topic was similarly communicated by 8/10 leading fashion companies and 6/10 slow fashion companies. One of the most widely communicated guideline was the commitment for United Nations Global Compact, especially among the leading fashion companies (e.g. Burberry, Gucci, H&M, Louis Vuitton, Inditex and Nike). This commitment is made to align the strategies and actions to advance the companies’ sustainability efforts, including the four principles of labour: ensuing freedom of association and right to collective bargaining, elimination of forced labour, abolition of child labour, and elimination of discrimination.

While a few slow fashion companies have also signed the Global Compact (e.g. Reformation), there is also a great number of slow fashion companies that are holding the Fair-Trade certification (People Tree, Patagonia, PACT Apparel, Raven + Lily). This is a clear distinction to the leading fashion companies since none of them is Fair-Trade certificated. As People Tree states, the Fair Trade is showing their dedication and compliance to “fair wages, good working conditions, transparency, environmental best practice and gender equality”. As a more concrete example, Raven + Lily mentions that through their Fair-Trade certification, they have been able to empower over 1500 women by providing them “a Fair-Trade wage and access to a safe job, sustainable income, healthcare, and other tools they need to thrive”.

The different examples provided in this subchapter show that the communication regarding labour practices (training suppliers and working conditions) among both leading and slow fashion companies is not much different from one another. Basically, the total number of companies disclosing these issues was almost the same and the approaches chosen to be emphasised were also quite similar. The only difference found was the fact that some of the slow fashion companies holds a Fair-Trade certification which was not the case with the leading fashion companies.

5.8 Consumer issues

The category of consumer issues includes three different subcategories. Firstly, there is a subcategory called educating consumers which includes communication of informative and educational facts regarding the negative environmental and social impacts of fashion industry. Next is garment care which is about considering the whole fashion products' lifecycle by educating consumers how to make the most use out of their clothes and take care of them in sustainable way. Lastly in the category of consumer issues is take-back program which is about communicating the possibility for consumers to close the loop of fashion (meaning the fashion companies are making the effort to collect used clothing).

5.8.1 Educating consumers

Only four leading and four slow fashion companies were clearly communicating the issues of negative impact of fashion production and consumption. From the leading fashion companies, the ones providing this educational information on their websites were Nike, H&M, Adidas and Burberry whereas Reformation, Patagonia, ADAY and Eileen Fisher were the ones representing slow fashion companies in this category.

The topics covered in educating consumers of sustainability issues were quite similar, being most commonly the negative impacts of raw materials' production, water usage, waste created, harsh chemicals used in the production. Some companies even addressed the issue of afterlife-life of clothing. However, there was no clearly outstanding and different approach taken to bring this educational information to

consumers other than Patagonia's Cleanest Line blog aiming for encouraging the dialogue about the environmental issues they are most concerned about.

While there was no wide acceptance of embracing this topic, it is important that there are these few companies making an effort in their communication to bring the awareness of the negative impacts of fashion and to educate consumers. Especially in the case of leading fashion companies since being big companies their chances to get their message through to consumers tends to be much higher. As Reformation well puts it, "knowledge is power, so we talk about resource use, climate change, and other impacts of fashion" and while few companies have taken the step to right direction, many more fashion companies are needed to raise the awareness of these negative impacts.

5.8.2 Garment care

Garment care was one of the few categories of topics that slow fashion companies were communicating more widely on their website (6/10 addressing this issue). Among the leading fashion companies, the one and only one sharing garment care related information was H&M.

The basic idea for sharing this information is to educate consumers to take care of their clothing and fashion items so they would last longer and would be maintained in sustainable way. These tips encourage consumers to wash only when needed (spot cleaning or airing them instead if not thoroughly dirty), to skip the dryer (drying on washing line instead), washing in cooler temperature, hand washing synthetics (to minimise microfiber shedding), and choosing green dry cleaning. People Tree was providing even more specified tips on their handmade products while as Eileen Fisher included in their care tips step by step instructions of how to hand wash a sweater and sew a button.

As many of the other companies Stella McCartney provided its garment care tips in partnership with Clevercare. They state on their website how this initiative "reminds us all to consider the environment when washing, drying and taking care of our clothes". This would extend the life of fashion while reducing the amount of clothing

filling up the landfills and, basically helping to reduce the ecological footprint of clothing. This is an important part of the fashion companies' sustainability communication since, as H&M states, up to 21% of the total impact of the clothing's lifetime is outside of the fashion companies' reach; how the consumers take care of their clothes. Therefore, this topic would be expected to be even more covered, especially by leading fashion companies since they are lacking the communication within this category.

5.8.3 Take-back program

Last but not least in the consumer issues category is take-back programs. This subcategory was almost equally widely covered by leading and slow fashion companies (5/10 leading fashion and 6/10 slow fashion companies). The biggest difference among the companies lies in the fact what happens to the used fashion items after they have been collected. While the leading and slow fashion companies proposed quite similar solutions for take-back programs, some slow fashion companies provided more innovative solutions to really motivate consumers to recycle their used clothing instead of just throwing them away.

H&M and Adidas both have collaborated with I:CO for their take-back program. This means that after collecting the items, they are sent to I:CO where they are sorted according to their condition, ending up being either reworn (by selling them to as secondhand clothes), reused (turned into new products) or recycled (turned into textile fibers). UNIQLO and Zara provide a similar approach by donating the usable items to NGOs and to people in need. Additionally, UNIQLO turns the unwearable ones into energy and plastic fuel pellets although, as a quite remarkable difference it accepts only their own used garment to being collected in the first place. As for Nike, collected used athletic shoes are turned into Nike Grind material which is in turn used either for their shoes or for producing sports surfaces.

For slow fashion companies, the take-back programs are more than just fulfilling their duty to close the loop by collecting garments. As Eileen Fisher states, taking back their old clothes "it's just one of the ways we're building a better industry" targeting to end the conventional cycle of consumerists to design the future without

waste (circular economy). One of the ways to fulfill this commitment, Reformation is collaborating with THREDUP, aiming to “clean out” the closets of consumers. This is done by providing an option for their customers to ship their unwanted garments (or getting the clothes picked up from their door) to get them recycled or reused. By doing so, the customers will earn Ref Credit that can be used for their next purchase. Also, they remind their customers of having an option to donate their clothes locally in order to avoid unnecessary transportation.

ADAY is also giving their customers store credit for sending the garments to be recycled. Additionally, they provide the store credit (with higher amount) if the customer ends up gifting the clothing to a friend and sending a photo about it. Another creative solution for a take-back program is communicated by Cuyana. They have created a “Lean closet movement” through which their customers can send their used garments and get the store credit in exchange. These garments would be then donated to victims of abuse. Also, when the customer uses this store credit, Cuyana will donate 5% of profits of the total purchase to give back to women in need.

The most distinctive communication of take-back programs was provided by Eileen Fisher and Patagonia. They take even more holistic approach in recycling the used garments, showing their efforts to drive the change in producing and consuming the fashion. Eileen Fisher considers the different stages of fashion item’s lifecycle by aiming with their program to give clothes first life (designing timeless, made to last pieces with sustainable materials), second life (taking back their brand’s used clothes, washing them and reselling them through their website, or third life (transforming damaged pieces into artworks, pillows and wall hangings). Hence, their view for taking back their items starts already in their design process and highlights their commitment to circular economy. This basically means designing clothes that are made to last so they could be taken back to resell or to be turned into new raw materials.

Similarly to Eileen Fisher, Patagonia also considers the recyclability and repairability of their products in their design phase. They state having as a business the “responsibility to make higher quality products to help reclaim the act of ownership: make parts accessible and repair easy”. Therefore, they take back worn out Patagonia

products and whenever feasible facilitate the reuse or recycling them. Moreover, they promote as their number one solution to repair the damaged goods which why they employ 45 full-time repair experts helping their customers to fix their gear. In fact, Patagonia has its own Worn Wear program dedicated encouraging consumers to change their overall relationship with the things that they own. This program is promoting a message of “investing in quality, repairing things when they break, passing along clothing to others when it’s no longer being used, recycling worn out goods and celebrating the clothing that travels with us through life”. Basically, encouraging to make the most out of what you already have and be conscious (and responsible) about what happens to your used stuff when you no longer want them. This mindset in turn would minimize the impact of consuming fashion.

To conclude this section, there were quite many companies promoting efforts to create more circular future for fashion and to take responsibility of the afterlife of their products. Although the basic idea for all of the take-back programs remains similar there were some differences found. These differences mainly occurred depending on how the used garments are handled after they are collected and where they end up to.

5.9 The main message of sustainability communication

The final part of the content analysis of this study included identifying what is the core message behind of each fashion companies’ communication of sustainability. Of course, there were cases where a company may have had elements from variety of different categories, but the analysis aimed for identifying the core message transmitted through the fashion company’s website. Hence each company has the possibility to score 1 (message present) only in one of the four different possibilities: consume responsibly (social marketing), consume differently (green marketing), consume less (green demarketing) or consume as usual.

Consume responsibly refers to the fashion companies’ sustainability policy being to encourage the consumers to choose the responsible options of fashion while promoting their own more responsible options. Consume differently would mean educating consumers on environmental issues and focusing on promoting

environmentally safe options of their own products. Consume less would in turn mean encouraging the consumers to make the most out of what they have instead of buying new things that often.

The last remaining category consume as usual was actually identified during the content analysis and was added to the coding scheme. This was due to the fact that there were many leading fashion companies that did not fit in any of the existing categories since their communication was lacking a clear distinctive socially responsible marketing message. Therefore, consume as usual has no means of promoting sustainable consumption, but instead it is focused around sharing the information of company's sustainability efforts.

The following subchapters will discuss in more detail the strategic messages behind leading and slow fashion companies; the most common messages communicated and the possible differences. The summarizing tables of the companies' frequency for communicating their marketing messages is in appendices (see Appendix 3 and Appendix 4).

5.9.1 Consume responsibly

There were a few leading as well as slow fashion companies emphasising the responsibility aspect of fashion. From leading fashion companies, Nike and Burberry were the ones having this as their core sustainability message. Nike was strongly emphasising their efforts for inclusion and diversity (especially in their own facilities) training their suppliers, disclosing transparently their supplier locations and ensuring healthy and safe conditions for the people manufacturing their products. Also, they highlighted their strict policies and auditing systems regarding their manufacturing which is also in turn putting the focus on ensuring responsibly produced products.

Burberry on the other hand was not having that wide spectrum of topics covered regarding the responsibility. Instead their focus was much more narrowed: emphasising knowing their suppliers (artisans) while preserving the valuable know-how by transferring the skills of the craftsmanship. This was one of the most clearly

emphasised and communicated topic on Burberry's website alongside with their responsibility for their people (training employees, health and safety), supply chain (policies and principles) as well as the communities (donations and volunteering). Therefore, the overall message was strongly focusing on producing responsibly and promoting more responsible fashion.

As for the slow fashion companies, Everlane, People Tree, PACT Apparel and Raven + Lily had all embraced the approach to promote responsible fashion. For People Tree and PACT Apparel, providing responsible fashion is more about emphasising their companies being Fair Trade certificated. They have this widely known third-party approval that their products are produced responsibly, ensuring fair wages and safe working conditions. Raven + Lily also emphasised on paying fair living wages and this was due to the fact that they let their partners set the price while also communicating their goal to empower women. This is why they had focused their giving back program contributing to the microloans for East African women.

However, the clearest approach of delivering the message of consuming responsibly was provided by Everlane. Their idea of "radical transparency", as discussed earlier, reveals the true cost of their products while also comparing this cost to their final prices and on the average prices on the market. Thus, Everlane highlighted their efforts to be transparent in their business practices and the importance of consumers' right to know about pricing and true cost of their clothing. This is a good example of fashion company's creative approach in promoting the overall sustainability message to consume responsibly while also showing the willingness to lead the way for other companies to do the same.

5.9.2 Consume differently

Three leading fashion companies (H&M, Adidas, Gucci) and three slow fashion companies (Reformation, Stella McCartney, Eileen Fisher) had clearly communicated to consume differently as their core message. In all of these companies, the reason why the core message fell under this category was mainly by their educational information regarding negative impacts of fashion and their emphasis on the importance of circular economy. For instance, both H&M and

Adidas were providing a lot of specific information of the negative impacts (e.g. how much resources the production of raw materials and finished products require, what is the role of transportation, the usage of hazardous chemicals). These companies are also stating their commitment to the importance of creating awareness of the sustainability issues while also finding the solutions to these problems. Additionally, H&M has its dedicated yearly launched Conscious Collection, which provides environmentally friendly pieces.

Reformation and Gucci on the other hand were both emphasising a lot their efforts to calculate their environmental impact. Gucci uses its own Environmental Profit and Loss calculations as a basis in order to make better informed decision of the environmental impacts of their products. Reformation is also using their own estimation tools in conjunction with their commitment to offset basically everything including carbon emission, water used, and waste generated. Thus, both of these efforts indicate the message of providing “greener” options of fashion and to choose to consume differently. As for Stella McCartney and Eileen Fisher, they both are communicating strongly the need of fashion system to change and promote the importance of moving towards circular economy. By adopting this idea of circular economy and communicating their actions to achieve it, it is indicating their willingness to offer different options for consuming fashion.

5.9.3 Consume less

Promoting to consume less was not embraced category of sustainability message, since no leading fashion company showed a sign of emphasising this in their communication. Instead, there were three slow fashion companies that were clearly encouraging consumers to buy less and take a good care of the items they already own.

ADAY and Cuyana had a similar approach to deliver this core message of consuming less by proposing their customers to have a capsule or lean closet. These both aim for promoting to have only small selection of long-lasting timeless pieces in the wardrobe and basically to own less and ultimately to buy less. For ADAY, this means providing ready packages of selected pieces to help customers to get started in

building their very own capsule wardrobe. Cuyana in turn is promoting its Lean Closet program that “challenges us to collect fewer, better things and to leverage the unloved pieces in our wardrobes to help others in need”. Therefore, they will donate their used garments collected to support abused women.

Patagonia is even more clear with their approach of promoting the message of consuming less. They are stating on their website of the problem of today’s society “encouraging for being product-consumers, not owners”. The distinction is that product-owners take responsibility for their purchases by taking good care of them while product-consumers have the “take, make, dispose” mentality which is clearly unsustainable. More importantly, they highlight the fact that buying itself is not the problem meaning that there is a need for shared responsibility. Patagonia makes efforts to share this responsibility by designing durable and easily repairable products while encouraging their customers to take good care of their items. In other words, they help their customers to become “product-owners” by assisting in repairing, recycling, and reusing of their brand’s products.

As an interesting part of their marketing strategy, Patagonia have had their own advertisement stating, “Don’t buy this jacket”. With this campaign they wanted to make a statement and communicate to people “to buy less and to reflect before you spend a dime on this jacket or anything else”. Thus, this advertisement shows Patagonia’s efforts to step up in driving a change of the consumption with a very clear message to consume less in order to minimise the negative impacts of fashion.

5.9.4 Consume as usual

As for the remaining six leading fashion companies, there was no specific distinctive message identified in their sustainability communication. Thus, the category of consuming as usual includes Zara, Hermès, Louis Vuitton, UNIQLO and Victoria’s Secret. These companies focused their sustainability communication on other aspects, mainly just simply sharing the information about their strategies and actions regarding sustainability. Thus, they did not have any “bigger meaning” or message behind their communication.

For instance, even though *Zara* was communicating their efforts of sustainability, the main focus was on promoting their ability to react fast to the changing needs of their customers due to their integrated stock management, closeness of suppliers, and having a small lead-time between design and production. Therefore, even though they have mentioned their bold commitment to have zero waste going to landfills from their facilities by 2020, the main focus is on fastness of their production. Hence, they are not giving a message for promoting more responsible, environmental, long-lasting options for fashion.

As another example, *Louis Vuitton* was mainly focusing on their communication of sustainability how they are minimising the environmental harm using energy-efficient lighting in their facilities. Although they communicated with at least some level of commitment to philanthropies and promoting diversity and inclusion, their main message remained quite empty. Therefore, their communication gave the impression of using the sustainability only as a buzz word rather than working towards more sustainable fashion. The lack of any other specific message is quite confusing since they mention on their website that sustainable development has been their strategic priority since the founding of the company.

Lastly to mention in this category is *Victoria's Secret*. Despite of some of their sustainability topics communicated, there is no emphasis on any specific aspect of the sustainability. Since they state on their website as their mission being "to make our customers feel sexy, sophisticated and forever young" it is a quite clear that there is not that high commitment to promote sustainable products.

6 CONCLUSIONS

This final chapter provides a conclusion for this study. Firstly, there is a discussion of findings which is followed by theoretical contributions and managerial implications. And finally, this chapter provides an outlook for the limitations of this study as well as suggestions for the future research.

6.1 Discussion of findings

The purpose of this study was to explore fashion companies' current marketing efforts in the context of sustainability. To achieve this purpose, two guiding research questions were formed. Firstly, the aim was to explore is there a difference in the level of communication between leading and slow fashion companies regarding sustainability issues. Secondly to possibly identify what types of socially responsible marketing strategies these companies are using in communicating such issues. This study succeeded finding the answer for these two questions through content analysis on the websites of selected leading and slow fashion companies.

To start up with the level of communication, results of the content analysis reveals that overall both leading and slow fashion companies were addressing the sustainability issues on their websites in quite wide spectrum. Their communication included topics related to the environment, social responsibility, human rights, community involvement and development, labor practices and consumer issues.

As the number of the subcategories identified for each of these topics reveal, environmental issues were by far the most widely discussed giving various different aspects to approach the environmental impacts of fashion. This finding is aligned with the study by Fulton and Lee (2013) which states that companies are most commonly addressing environmental and social aspects of sustainability. Moreover, similarly to their results the companies were focusing a lot on using organic materials in their environmental sustainability. But as the consumer issues had the second highest number of subcategories identified, there is a possibility for fashion marketing to go be more than just addressing the environmental issues and instead

fulfill the need for collective learning and sustainable individuals (Garetti & Torres 2013).

Even though the number of companies might have been higher by the leading fashion companies addressing specific issues, it was usually the slow fashion companies having more creative means and distinctive approaches to sustainability (e.g. Patagonia's Earth Tax, Everlane's radical transparency approach). However, there were some categories where either leading or slow fashion companies had performed outstandingly better than the other in addressing the specific issue. The topics that were more frequently addressed by leading fashion companies were facilities, equality, diversity and inclusion as well as having clear measurable sustainable goals and providing a report of their progress in them. The slow fashion companies instead were embracing more issues like offsetting their negative environmental impacts and promoting consumers to take care of their garments.

The differences in emphasising certain topics indicate how these companies have chosen to approach sustainability. For leading fashion companies this means handling sustainability separately with its own separate goals and following guided structured reporting. Moreover, they have strict policies to promote inclusion and diversity while also aiming to reduce their environmental impact in their own facilities. Slow fashion companies instead are usually having a more holistic approach to sustainability, considering every stage of fashion production and consumption. This holistic view is aligned with the suggestions of previous studies as the need for integrated sustainability practices considering the whole life-cycle to drive the change for sustainable fashion (Khurana & Ricchetti 2016; Fulton & Lee 2013; Beard 2008). Additionally, the slow fashion companies acknowledge that they are themselves part of the problem of unsustainable fashion system which is why they are making an effort to promote a change in consumption and production.

Another interesting finding was to see the new sustainability topics arising (e.g. circular economy, ecological footprint, volunteering, educating consumers about the negative impacts of fashion production and consumption). While these topics might not have been the ones mostly embraced by the companies, they still lead the way where focus of sustainability in fashion is heading. Especially since quite many

companies are already considering circular economy, it is a clear indication that sustainability is not anymore only about using organic cotton and auditing factories. Instead it is moving towards systemic change where the fashion companies are embracing shared responsibility. Hence, there is already some fashion companies embracing the innovations for more sustainable fashion as it was expected in the State of Fashion Report (2017).

When it comes to the main sustainable marketing message, leading fashion companies were relying more on just “listing” their actions for sustainability without really having any distinctive socially responsible marketing message included. Thus, most of them falling to category of “consume as usual” being their core message. But slow fashion companies’ message was much clearer since each one of them was identified in either their message being consume responsibly, differently, or less. As the slow fashion companies are more creative in their sustainability approaches and promoting a clearer marketing message, they are choosing opportunity-seeking over conformance and resistance to respond the pressure for being sustainable. For leading fashion companies, the respond seems to be simply conforming with the requirements since they are in most of the cases listing the actions and their communication is built around the message of consume as usual. (Pedersen & Gwozdz 2014).

Interestingly the overall number of companies who promoted for consuming differently was equal to those whose core message was to consume responsibly. The message of consume less was solely embraced by very few slow fashion companies and none of the leading fashion companies had this as their core marketing message. As the overconsumption of fashion is going out of control leading to very big negative impacts of fashion, it is interesting to see whether this demarketing approach would be even more used as later on in the marketing to drive the change in fashion consumption.

To conclude, this study succeeded to explore the current level of fashion companies’ sustainability communication where a very wide spectrum of topics was covered in different areas of sustainability. Although there were certain categories where bigger differences occurred, the level of communication between leading and slow fashion

companies did not have a major difference. Instead the difference relies in the nature of this communication: how creative were the actions, programs and approaches communicated for each sustainability issue.

Secondly, this studies' findings fulfill the aim to identify the socially responsible marketing strategies used in these companies' sustainability communication. While all of the slow fashion companies had recognizable core message in their sustainability communication, half of the leading fashion companies were not embracing any of the socially responsible marketing approaches. Hence half of the leading fashion companies did not have a distinctive overall message addressing the need for a change. Therefore, even if some steps have been already taken to implement the socially responsible marketing approaches (social marketing, green marketing, green demarketing), much more efforts are needed. These efforts could enable fashion marketing leading the change for more sustainable fashion industry.

6.2 Theoretical contributions

This study has provided an outlook in the current state of fashion companies' sustainability communication. Firstly, the results of this study increase the understanding of what is the current level of fashion companies' communication regarding sustainability issues. This includes the insights of sustainability topics are mostly covered and what are the most innovative means highlighted for each topic. Moreover, the results of this study have shown some generalized differences between leading and slow fashion companies and how they are approaching these sustainability issues in their communication.

Additionally, new more specific topics of sustainability categories were discovered. Therefore, the findings of this study are also indicating new arising topics that could be possibly more addressed in the future. More importantly, these new arising topics could be good indicator where the focus of sustainable fashion industry might be heading in the future (e.g. microfibers and offsets).

Secondly, this study has contributed in categorizing different socially responsible marketing strategies that can be used in the fashion companies' sustainable

communication. As the results of this study show, there is evidence of some of the fashion companies already taking such approaches in their sustainability communication. These are important communication strategies to acknowledge since all of them are aiming for making a difference in fashion consumption while embracing United Nations sustainability goal for “consumer’s right to be informed” regarding the fashion industry’s sustainability issues.

6.3 Managerial implications

The findings of this study can be used to increase the understanding of what is sustainability in fashion and what are the different approaches to address these issues. As for fashion marketers, this study provides a number of examples how leading and slow fashion companies are communicating their sustainability efforts. These examples can be useful to give insightful information regarding the wide spectrum of topics that can be included in the communication of sustainability. Also, the findings of this study highlight the newer topics that fashion companies could be addressing in order to take their sustainability communication to even higher level.

As for the socially responsible marketing strategies, this study highlights the possibility for fashion marketers to lead the change by adapting a socially responsible message for their sustainability communication. Therefore, especially for the fashion companies that want to be the leaders of change rather than comforting their efforts in sustainability, this study’s findings provide insights of how these messages can be communicated on their company’s website.

In more general, the findings of this study are not limited to be used only by the fashion marketers. The topics of sustainability categorized in this study can also be used by other businesses. These findings could help them to evaluate their own level of communication: how widely they are addressing these universal sustainability topics.

Also, the approaches for socially responsible marketing suggested in this study can also be universally applied to the businesses coming from any industry. This is because the overproduction and consumption are present in many other industries as

well, not just in fashion. Hence, the findings of this studies are not limited to being used only by fashion marketers but instead by any company seeking to improve their level of communication of sustainability and to take more socially responsible approach to deliver their marketing messages.

6.4 Research limitations

One of the limitations for this research is that sustainability is a very broad undefined concept. This could have possibly affected categorizing of the coding scheme regarding sustainability issues communicated. As there are no straightforward guidelines what can be considered sustainable fashion practices, the categories formed for coding scheme could not be formed in any strict manner. Therefore, it left room for subjective selection of which topics are included.

Additionally, the coding for the content analysis was based on only one researchers' categorization and coding efforts. This could have led to more subjective coding compared to a situation where there would have been other coders contributing to the research and providing a verification of getting matching results.

As for the comparability between different companies, the amount of information provided on some (especially slow fashion companies') website was quite limited- Therefore it left quite a little content to be analysed on certain websites. On the other hand, some big companies provided pages and pages of sustainable related content making it challenging to set the limits of analysis. Hence, the huge difference in the content available being analysed could have been limiting the efforts to compare the different companies' level of communication and identifying their possible socially responsible marketing message.

Lastly, since the content analysis was based on websites which are constantly updated sets up another challenge in creating comprehensive overview of the current level of sustainable communication. Therefore, combining this factor with a short-limited timeline to conduct the research, the analysis of the results has to rely more on the generalized snapshot rather than having the ability to collect the data over a longer period of time and truly observe the nature of the communication.

6.5 Suggestions for the future research

As for the future research, since the sustainability as a concept is constantly evolving, reviewing the categorization of sustainability topics in this study could be interesting. Additionally, it could be interesting in the future to compare the results and to see what are the new most emphasised sustainability issues and new sustainability topics arising. Also, since this study had smaller sets of samples, conducting a similar research for bigger sample could be insightful. These results could be more generalized revealing some other possible differences between leading and slow fashion companies.

Especially in the case of socially responsible marketing strategies, more research efforts are needed to identify different marketing approaches for fashion companies that could be used for communicating sustainability. This would be even more evident in the future since most likely the pressure would be increasing for fashion companies to take responsibility for their actions. In order for them to communicate their sustainability efforts to consumers, they need to be able to break the knowledge barrier between them and the consumers. Hence, different marketing strategies are needed to reach consumers while addressing their right to know what the impacts of the fashion production and consumption are. This is the moment where fashion marketing can be leading the change. By having a strong socially responsible message throughout the sustainability communication, a much-needed systemic change could be achieved where the consumers are well-informed, and sustainability is embraced in fashion industry as well.

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Appendix 1**Sustainability issues communicated – leading fashion companies**

	Nike	H&M	Zara	Adidas	Hermès	Louis Vuitton	Gucci	UNIQLO	Victoria's Secret	Burberry	/10
Visibility	1	1	0	0	1	0	1	1	0	1	6
Vision	1	1	1	1	0	1	1	0	0	1	7
Sustainability report	1	1	1	1	1	1	1	1	0	1	9

Environment

Circular economy	1	1	1	1	0	0	1	0	0	1	6
Ecological footprint	1	0	0	0	0	0	1	0	0	0	2
Materials	1	1	1	1	1	0	1	1	1	1	9
Transportation	0	1	1	0	0	0	1	0	1	0	4
Facilities	1	1	1	1	1	1	1	0	1	0	8
Microfibers	0	1	0	1	0	0	0	0	0	0	2

Offsets	0	0	0	0	0	0	0	0	0	0	0
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Social responsibility

Philanthropies	1	1	1	1	1	1	1	1	1	1	10
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Transparency of reuses needed for production	1	1	1	1	1	0	0	0	0	1	6
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Human rights

Equality, diversity and inclusion	1	1	1	1	0	1	1	1	1	1	9
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Community involvement and development

Volunteering	0	0	0	1	0	0	1	0	1	1	4
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Labour practices

Training suppliers	1	1	1	1	0	0	1	1	1	1	8
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Working conditions	1	1	1	1	0	1	1	1	0	1	8
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Consumer issues

Educating consumers	1	1	0	1	0	0	0	0	0	1	4
Garment care	0	1	0	0	0	0	0	0	0	0	1
Take back program	1	1	1	1	0	0	0	1	0	0	5

Appendix 2

Sustainability issues communicated – slow fashion companies

	Everlane	Reformation	People Tree	Patagonia	PACT Apparel	Stella McCartney	ADAY	Raven + Lily	Eileen Fisher	Cuyana	/10
Visibility	0	1	1	1	0	1	0	1	1	0	6
Vision	1	1	0	0	0	0	0	0	1	0	3
Sustainability report	0	1	0	1	0	0	0	0	1	0	3

Environment

Circular economy	0	1	0	0	0	1	0	0	1	0	3
Ecological footprint	0	1	0	1	0	1	0	0	0	0	3
Materials	1	1	1	1	1	1	1	1	1	0	9
Transportation	0	1	0	0	0	0	0	0	1	0	2
Facilities	0	1	0	1	0	1	0	0	1	0	4
Microfibers	0	1	0	1	0	0	1	0	0	0	3

Offsets	0	1	0	0	0	1	0	1	1	0	4
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Social responsibility

Philanthropies	1	1	1	1	0	1	0	1	1	1	8
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Transparency	1	1	1	1	0	0	1	1	0	1	7
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Human rights

Equality, diversity and inclusion	0	1	1	0	0	0	0	1	1	0	3
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Community involvement and development

Volunteering	0	1	0	1	0	0	0	0	1	0	3
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Labour practices

Training suppliers	0	1	1	1	0	1	1	0	1	0	6
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Working conditions	0	0	1	1	1	1	0	1	1	0	6
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Consumer issues

Educating consumers	0	1	0	1	0	1	0	0	1	0	4
Garment care	0	1	1	1	0	1	1	0	1	0	6
Take back program	0	1	0	1	0	0	1	0	1	1	5

Appendix 3**The main message of sustainability communication – leading fashion companies**

	Nike	H&M	Zara	Adidas	Hermès	Louis Vuitton	Gucci	UNIGLO	Victoria's Secret	Burberry	/10
Consume responsibly	1	0	0	0	0	0	0	0	0	1	2
Consumer differently	0	1	0	1	0	0	1	0	0	0	3
Consumer less; encouraging consumers to not buy that often	0	0	0	0	0	0	0	0	0	0	0
Consume as usual	0	0	1	0	1	1	0	1	1	0	5

