



Sustainable Fashion: make green the new black

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Abstract

The increase of climate change along with the growing concern with the environment among the population, has led multiple industries to address the issue of sustainability. The fashion industry has received greater exposure regarding this issue since it is the second most polluting industry in the world. In recent years, several sustainable fashion brands have emerged. Yet, these companies face challenges in implementing sustainability. Recent research shows that there are also several barriers to sustainable fashion consumption, as well as possible solutions to overcome them. Nevertheless, it remains unclear if these solutions have been implemented by brands and if they are successful, and whether new solutions have emerged in the meantime. Therefore, this thesis research question is: How can sustainable fashion brands be more successful? To answer this question, I adopted a qualitative approach and conducted a multiple case study on four Portuguese sustainable fashion companies.

In addition, 7 young Portuguese women were also interviewed. The results show that there are still several barriers to the growth of sustainable fashion brands and that not all proposed solutions are feasible. However, I have identified 7 solutions that have been implemented by sustainable fashion brands and have been successful and 7 suggestions whose success has not yet been proven as they have not yet been implemented, but which have had a positive reaction from both companies and young female consumers. This study is mainly relevant for managers, since it offers practical recommendations for sustainable fashion managers to attract young consumers.

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Sumário

O aumento das alterações climáticas juntamente com a crescente preocupação pelo ambiente por parte da população, levou a várias indústrias a abordar o tema da sustentabilidade. A indústria da moda tem recebido um maior destaque em relação à sustentabilidade, devido a ser a segunda indústria mais poluente do mundo. Nos últimos anos, várias marcas de moda sustentável têm surgido. Todavia, estas empresas enfrentam desafios na implementação da sustentabilidade. Investigações recentes mostram que existem também várias barreiras ao consumo de moda sustentável, bem como possíveis soluções para ultrapassá-las. Todavia, ainda não está claro se estas soluções já foram implementadas pelas marcas e se são bem-sucedidas, e se, entretanto, surgiram novas soluções. Consequentemente, a questão de investigação desta tese é: Como podem as marcas de moda sustentável ser mais bem-sucedidas? Para responder a esta pergunta, adotei uma abordagem qualitativa e realizei um estudo de caso múltiplo de quatro empresas portuguesas de moda sustentável.

Para além disso, também foram entrevistadas 7 jovens portuguesas. Os resultados mostram que existem ainda várias barreiras ao consumo de moda sustentável e que nem todas as soluções propostas são viáveis. No entanto, identifiquei 7 soluções que foram implementadas por marcas de moda sustentável e que tiveram sucesso e 7 sugestões cujo sucesso ainda não foi comprovado pois ainda não foram implementadas, mas que tiveram uma reação positiva tanto das empresas como das jovens consumidoras. Este estudo é sobretudo relevante para os gestores, uma vez que oferece recomendações práticas para os gestores de moda sustentável atraírem os jovens consumidores.

Título da dissertação: Moda Sustentável: fazer do verde o novo preto

Autor: Inês de Alós

Palavras-chave: Moda sustentável, Estratégia de sustentabilidade, Moda, Barreiras, Soluções, Portugal, Jovens mulheres

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“¡Sagrado Corazón, en Vos confío!”

Table of Contents

Abstract	i
Sumário	ii
Acknowledgements	iii
List of Tables	vi
List of Acronyms and abbreviation	vii
1. Introduction	1
2. Literature Review	3
2.1. Sustainability: make green the new black	3
2.1.1. Sustainability: the definition	3
2.1.2. Sustainable fashion: an urgent necessity	4
2.2. A dream called sustainable fashion	5
2.2.1. Trends among sustainable fashion brands	5
2.2.2. Barriers faced by sustainable fashion brands	6
2.2.3. Barriers in sustainable fashion consumption.....	7
2.2.4. Possible solutions to the challenges identified.....	8
3. Methodology	9
3.1. Research Design	9
3.2. Data collection	10
3.3. Data analysis	12
4. Empirical Setting	15
4.1. ISTO.	15
The brand.....	15
Business Model	15
Competition	16
Consumer	16
4.2. Obi	17
The Brand.....	17
Business Model	17

Competition	18
Consumer	18
4.3. Francis Stories	18
The Brand	18
Business Model	19
Competition	19
Consumer	19
4.4. SIZ	20
The Brand	20
Business Model	20
Competition	21
Consumer	21
5. Findings and Discussion.....	22
5.1. Challenges that Portuguese sustainable fashion brands face in the Portuguese fashion market.....	22
5.1.1. Challenges in matching demand and supply	22
5.1.2. Challenges faced by brands	24
5.1.3. Challenges faced by consumers	26
5.2. Possible solutions to overcome the challenges	28
5.3. Summarizing table	36
6. Conclusion.....	38
7. References	40
8. Appendices	47

List of Tables

Table 1 – Summary of company interview themes	11
Table 2 – Summary of consumer interview themes	11
Table 3 – Codes from literature review	12
Table 4 – Codes from data	13
Table 5 – Coding examples	13
Table 6 – Data sources and use in analysis	14
Table 7 – Possible solutions to the challenges	37

List of Acronyms and abbreviation

Corporate social responsibility - CSR

Francis Stories – FS

Global Organic Textile Standard - GOTS

Global Recycle Standard - GRS

Gross Domestic Product - GDP

Obi Clothing – Obi

Research question - RQ

World Commission on Environment and Development - WCED

I

Introduction

“The greatest threat to our planet is the belief that someone else will save it.” – Robert Swan¹.

Fashion has been under the spotlight lately. Despite the positive economic impact of the fashion industry, it has a negative impact on the environment (Crane & Glozer, 2016; Moretto et al., 2018). Some sustainable fashion brands have emerged over the years due to consumer demands for more sustainable business practices. However, these companies are facing challenges in implementing sustainability such as high costs (Henninger et al., 2016). Moreover, sustainability in fashion can only be achieved when both companies and consumers change their actions - *"this is only feasible (...) if consumers support sustainable fashion by purchasing it"* (Mcneill & Moore, 2015). Despite the growing awareness among consumers, the adherence was not as expected. Many authors talk about barriers to sustainable fashion consumption (Harris et al., 2016), which led to an "intention-behavior gap" (Joergens, 2006; Mcneill & Moore, 2015; Niinimäki, 2010a). Due to this, some authors saw the need to identify possible solutions for the growth of sustainable fashion (Diddi et al., 2019; Harris et al., 2016; B. Shen et al., 2012). Nevertheless, it remains unclear if these have been implemented and are successful, and whether new solutions have emerged in the meantime

This topic is relevant for managers. The findings of this study should be considered by sustainable fashion brand's managers to be more successful.

With the purpose of closing the mentioned gap, I decided to study what solutions should be implemented for sustainable fashion brands to be successful, by answering the following research question (RQ): How can sustainable fashion brands be more successful? To answer this question, I will specifically study the Portuguese market.

To answer my RQ, I used a qualitative method, more specifically a multiple case study. The companies studied were ISTO, Obi, FS and SIZ. This choice seemed appropriate since they are Portuguese sustainable fashion brands that have been successful. Furthermore, seven young Portuguese women were interviewed to better understand the barriers to sustainable fashion consumption and possible solutions.

¹ (Acciona, 2022)

The results show that there are still several barriers to the consumption of sustainable fashion, and not all solutions presented are feasible by companies. Nevertheless, it was possible to identify some solutions that should be implemented by sustainable fashion brands to increase their success. I have identified 7 solutions which have been implemented by brands and had success. Furthermore, my study suggests 7 possible solutions whose success has not yet been proven as they have not yet been implemented, but which have had a positive reaction from both companies and young female consumers.

The structure of this thesis is as follows. In the first chapter, I present an overview of the existing literature concerning sustainability in the fashion industry, highlighting the current challenges for sustainable fashion businesses and consumers, and possible solutions. After identifying the gap in the existing literature, the methodology chosen for the collection and analysis of primary and secondary data that will answer the RQ is presented. Next, the empirical scenario is introduced, meaning that the studied companies are presented. The following chapter is called conclusion and discussion as it presents the results of the data analysis, the answer to the RQ and compares the results with previous literature. Finally, the conclusion addresses the main conclusions, limitations, and suggestions for future research.

II Literature Review

With this literature review it can be stated that environmental sustainability is an important topic since the protection of the environment is necessary. From a business point of view, particularly in the fashion industry it is also an important topic that companies must address since consumers are demanding more sustainable practices from companies. Apart from moving towards sustainable materials, there are other business models that companies can implement such as: recycling and reselling (Todeschini et al., 2017). Nevertheless, it was possible to observe an intention-behavior gap among consumers. This is due to several barriers faced when buying sustainable fashion, such as high price (Pereira et al., 2021). On the business side, companies also face challenges in implementing sustainability such as high costs (Henninger et al., 2016).

First, a definition of sustainable development will be made. Then, the relationship between sustainability and fashion will be presented. Subsequently, sustainable fashion will be presented as long with the most common practices. Challenges faced by both consumers and sustainable fashion brands will be analyzed, as well as possible solutions. Finally, the gap will be presented.

2.1.Sustainability: make green the new black

Sustainability is a topic that has been gaining more notoriety among researchers, individuals, governments, and companies (Kunz et al., 2020). Despite this, there is no agreement on the definition of sustainability (Morelli, 2011). The fashion industry is one of the largest industries in the world (Fashion United, 2018). However, it has a negative impact on the environment (Crane & Glozer, 2016; Moretto et al., 2018). This situation combined with the large media coverage (Shrivastava, 1995), has made fashion companies strive to improve their sustainability (Haws et al., 2014; Kang et al., 2013; Lewittes, 2018; Wang et al., 2019).

This section begins by presenting the definition of sustainability (2.1.1.). Afterwards, sustainability in the fashion industry is analyzed (2.1.2.).

2.1.1. Sustainability: the definition

The climate change and lack of resources have resulted in an increase of literature in sustainability and an increase in concern by individuals, businesses, and governments (Kunz et al., 2020). The term “sustainability” was first mentioned in 1713 by Hands Carl von Carlowitz.

This term is considered synonymous with sustainable development by some authors (Dresner, 2002). Since then, several authors have tried to define the term sustainable development (Johnston et al., 2007). However, there is no agreement between authors (Morelli, 2011). The most accepted definition of sustainable development was made by the WCED, as "*development that meets the needs of the present without compromising the ability of future generations to meet their own needs*" (World Commission on Environment and Development, 1987, p. 41). The term sustainable development is often accompanied in the literature by the three pillars of sustainability: economic, social, and environmental (Basiago, 1998; Boyer et al., 2016; Schoolman et al., 2012). In this study, I will focus on the environmental pillar.

2.1.2. Sustainable fashion: an urgent necessity

According to Solomon Rabolt Nancy J. (2004, p. 503), the term fashion can be described as "*the process of social diffusion by which a new style is adopted by some group(s) of consumers*". The fashion industry is one of the largest industries in the world, valued at \$3 trillion and accounting for 2% of the world's GDP (Fashion United, 2018). Despite the positive economic impact, fashion has a negative impact on the environment (Crane & Glozer, 2016; Moretto et al., 2018). Currently, this industry is considered the second most polluting industry in the world, being responsible for 10% of Global carbon emissions (McKinsey & Company, 2019). This negative impact is due to the depletion of natural resources during production, as well as the generation of hazardous waste and greenhouse gases (Kozar & Hiller, 2010; Niinimäki, 2010b). Furthermore, the growth in consumption has also brought dangers to the environment, as it has resulted in tons of by the clothes in landfills every year (Ramos et al., 2020).

Within the fashion industry, fast fashion is one of the biggest responsible for this impact. There are several definitions for the concept fast fashion, such as "*a business model based on offering consumers frequent novelty in the form of low-priced, trend-led products*" (Niinimäki et al., 2020, p. 189). Fast fashion has as its main objective to satisfy the demand for newness of its consumers (Barnes & Lea-Greenwood, 2006; Yang et al., 2017), especially the younger ones who can be considered its main target since they have a limited budget and a desire to follow the main trends (Barnes & Lea-Greenwood, 2006; Doeringer & Crean, 2006; Morgan & Birtwistle, 2009; Yalkin & Elliott, 2006).

Fashion's impact on sustainability has been receiving a great deal of media coverage, in which responsibility is mostly attributed to companies (Shrivastava, 1995). Due to this, many

companies have been making a great effort to improve their sustainability through more environmentally friendly processes and products (Haws et al., 2014; Kang et al., 2013; Lewittes, 2018; Wang et al., 2019).

2.2. A dream called sustainable fashion

The negative impact of fashion on the environment has led to the emergence of sustainable fashion brands. The lack of agreement on a single definition has led to different interpretations and different business models (B. Shen et al., 2012).

This section begins by defining sustainable fashion as well as the most used practices (2.2.1.). Then the barriers faced by sustainable fashion brands are identified (2.2.2.). Afterwards, I analyze the barriers in sustainable fashion consumption (2.2.3.). Finally, possible solutions to the development of sustainable fashion are presented (2.2.4.).

2.2.1. Trends among sustainable fashion brands

Fashion's negative impact on the environment, along with the growing awareness that our resources are limited, has led to the emergence of sustainable fashion brands. The term sustainable fashion appeared in the literature with authors such as Beard (2008) and de Brito et al. (2008). Nevertheless, there is still no agreement on the definition of this term. Due to this, there is a certain difficulty in understanding what it means when someone talks about sustainable fashion (Bañon Gomis et al., 2011). The definition with the most agreement among authors for sustainable fashion is "*clothes that incorporate fair trade principles with sweatshop-free labor condition while not harming the environment or workers by using biodegradable and organic cotton.*" (Joergens, 2006, p. 361). Therefore, it can be concluded that the term sustainable fashion includes two dimensions: ethics and the environment. In my study, the focus will be on the environmental dimension.

Within sustainable fashion, there are several sustainable alternatives, that is, various ways of using the term sustainable fashion. According to Todeschini et al. (2017), there are five socio-economic and cultural macro-trends behind the push for sustainable business model alternatives: the circular economy; CSR; sharing economy and collaborative consumption; technological innovation; and consumer awareness. Within these five macro-trends, there are several business model alternatives that are being used by some sustainable fashion brands.

Nevertheless, this is an industry that has been changing so new ways of being sustainable may emerge.

Todeschini et al. (2017) focused on presenting different alternatives of sustainable business models, which will be commented hereafter. The circular economy aims to keep products, components, and materials useful for a long term. Within the circular economy we have: the upcycling business model that consists in transforming worthless materials, into new goods of value, utility, and quality; recycling, which consists in converting materials from existing products into a new product; and veganism that consists in not using raw materials of animal origin to reduce the energy consumption that is used in the processing of the material. The concept of CSR will not be commented since it will not be studied. The sharing economy and collaborative consumption, includes business models such as: collaboration, an ecosystem that drives the sharing of resources and knowledge, such as the rental of clothing; resale, which consists of selling clothing that are no longer used by consumers; and the fashion library, a clothing subscription service, in which the consumer pays a fixed fee to have access to a certain number of items for a certain time. The technological innovation includes the use of sustainable raw materials, such as organic cotton. And finally in consumer awareness, we find sustainable alternatives such as: low consumption, which consists in trying to influence the consumer to make more conscious and moderate purchases; and slow fashion, which consists in a greater focus on quality, sustainability, and social ethics.

2.2.2. Barriers faced by sustainable fashion brands

It becomes necessary to identify the barriers in implementing sustainability in a company. Sustainable companies are mostly small as they are usually companies with few years of life, they lack power and influence in the market (Caniato et al., 2012). Furthermore, they have a lack of capital and many costs as they are new companies with a small amount of production (Henninger et al., 2016; Pessôa et al., 2015). An example of these high costs is the need to choose sustainable raw materials and eco-friendly manufacturing processes (Ozdamar Ertekin & Atik, 2015). This choice is also time consuming, since it is necessary to ensure that environmental standards are being met by suppliers (Hur & Cassidy, 2019). Sustainable fashion brands must constantly work to reduce their impact on the environment (Popowska & Sinkiewicz, 2021). Furthermore, these companies have the task of educating consumers about what sustainable fashion is, since the government is failing in this area and there is a lack of knowledge among consumers (Harris et al., 2016). Additionally, consumers are always

demanding new clothes, something that goes against the concept of sustainable fashion which aims to create durable clothes that can be worn for several years (Hur & Cassidy, 2019). Finally, these companies also suffer from greenwashing practices of some competitors (Delmas & Burbano, 2011). As many companies, began to misleadingly advertise their sustainability (greenwashing), consumers began to distrust the green claims of all companies (Chen & Chang, 2013).

2.2.3. Barriers in sustainable fashion consumption

Currently, the blame for fashion's impact on the environment is mostly placed on companies and the government (Joergens, 2006). However, one can consider that consumers have also a responsibility since their decisions also have an impact on the environment (Brozović et al., 2020). Sustainability in fashion can only be achieved when both companies and consumers have changed their actions - *"this is only feasible in the long term if consumers support sustainable fashion by purchasing it"* (Mcneill & Moore, 2015).

Nowadays there has been an increase in consumer awareness of sustainability (Ritch, 2015). Nevertheless, their intentions to purchase sustainable fashion are not reflected in purchase behavior (Joergens, 2006; Mcneill & Moore, 2015). Indeed, several authors have identified an intention-behavior gap (Mcneill & Moore, 2015; Niinimäki, 2010b).

After identifying the intention-behavior gap among consumers, it becomes necessary to identify the main barriers in consuming sustainable fashion. Many authors present high price as the main barrier (Joy et al., 2012; Mcneill & Moore, 2015; Pereira et al., 2021). However, there are other barriers such as the limited supply and availability of sustainable clothing (Joergens, 2006; Pereira et al., 2021). Furthermore, many consumers claim that there are no stylish options available and consider this type of clothing unattractive and unfashionable (Gam, 2011; Harris et al., 2016; Joergens, 2006; Joy et al., 2012). It was also possible to identify a lack of knowledge of the negative effects of fashion on the environment, as well as a lack of social acceptability (Birtwistle & Moore, 2007; Mcneill & Moore, 2015; Pereira et al., 2021). There is difficulty in accessing information, meaning that consumers must spend valuable time to find more about sustainable fashion and which brands sell sustainable fashion (Pereira et al., 2021). Furthermore, there are restrictions when it comes to sustainable fashion, as not all styles are included - there is no business wear in sustainable fashion (Beard, 2008; Joergens, 2006).

Another barrier faced by consumers is the lack of trust in brands' sustainability claims (Kang & Hustvedt, 2014; Ritch, 2015).

2.2.4. Possible solutions to the challenges identified

The first solution to the barriers presented is a greater focus on design, which should be attractive (Gam, 2011; Harris et al., 2016). To overcome the price barrier, companies should emphasize the benefits of the garment, so that consumers consider it to have a superior value (Harris et al., 2016). Another way to justify the high price will be to provide additional fashion services such as assistance, repair, and clothing rental services (Harris et al., 2016). Another solution is to diversify styles, by introducing more formal lines (Beard, 2008).

The lack of knowledge means that companies must educate their consumers (Gam, 2011; B. Shen et al., 2012). The use of celebrities and influencers is also recommended to educate consumers, to gain awareness and consumer trust (Birtwistle & Moore, 2007). Another solution for the lack of trust is to increase the transparency of the supply chain (Beard, 2008; Harris et al., 2016; Henninger et al., 2016; B. Shen et al., 2012). It is also essential that labels are clear and accurate (Ma et al., 2017). Marketing is a tool that should be used by companies to overcome the barriers faced. A good strategy will be to communicate messages that highlight individual consumers' ability to contribute to solving environmental problems (Neumann et al., 2020). Finally, the government should establish incentives and laws for sustainable fashion so that the price of these sustainable brands can be more competitive (Harris et al., 2016).

This topic has been partially studied. There are some studies on the barriers faced in sustainable fashion (Harris et al., 2016), as well as possible solutions (Diddi et al., 2019; Harris et al., 2016; B. Shen et al., 2012). However, in the literature I found as a gap the fact that it is still unclear if these solutions have already been implemented and have been successful. I would also like to understand if new solutions have emerged in the meantime. There are still many difficulties on implementing sustainability in the fashion market, so I intend to answer the following RQ: How can sustainable fashion brands be more successful?

III

Methodology

In this chapter, I present the research (3.1.), as well as the data collection (3.2.) and analysis (3.3.).

3.1. Research Design

To answer the research question (How can sustainable fashion brands be more successful?), I decided to use a qualitative approach because it enables a better understanding of the phenomenon (Creswell & Poth, 2017) as it encompasses a diverse set of techniques that can provide a deeper and richer understanding of the issues under investigation (Maanen, 1979).

Within the qualitative study, I decided to conduct a multiple case study. I chose the multiple case study as it allows comparing the different points of view, i.e., identifying the differences and commonalities between the various sources. Furthermore, a multiple case study has more solid results (Patvardhan et al., 2014). This approach allows me to understand how sustainable fashion companies can be more successful by comparing the experience and opinion of companies regarding the suggested actions.

To answer this question, I will look specifically at the Portuguese market. The reasons why I have chosen the Portuguese market, is because (1) the Portuguese textile and clothing industry is one of the best performing industries worldwide. This is due to factors such as: industrial know-how, high quality of goods and services, flexibility, adaptability and skilled human resources (Associação Têxtil e Vestuário de Portugal, 2019; Nyfeler, 2021); (2) Production in Portugal is done in a socially and ecologically responsible environment (Nyfeler, 2021); (3) according to the study "Sustainable Consumption in Europe", 96% of the Portuguese want companies to have more sustainable products and practices, and this figure is more significant among women (Agência Lusa, 2020). However, when it comes to clothing there is little adherence (Correia, 2021).

The first step was to develop a list of companies to contact, which had in common being Portuguese sustainable fashion brands with clothing for females, since it is the main consumer of fashion in Portugal (Appendix A). To this end, I did intensive research, from which I obtained 18 companies (Appendix B). I contacted the companies both by email and LinkedIn. However,

I only got a favorable response from: ISTO., Obi, FS, SIZ and IVORY. Due to time constraints, I had to disregard IVORY.

I selected four companies to analyze: ISTO, Obi, FS and SIZ. I consider these companies suitable for my study as they are successful in the market. ISTO. had a sales increase of 100% between 2020 and 2021. Obi has increased by 17% in the last year. FS has increased sales around 50% each year since its launch in 2018. Lastly, SIZ had a sales increase of 122.857% between 2020 and 2021. Since my study aims to understand how sustainable fashion brands can be more successful, it is also important to understand the barriers felt by consumers as well as possible solutions to overcome them. Like Grassi (2020), I will collect primary data through two methods: interviews with experts and interviews with consumers. During the interviews with companies, I understood that brands had a target they did not know how to reach - young Portuguese aged 18-24. Something that goes in line with what was stated by Morgan & Birtwistle (2009), young female consumers are the ones who exhibit the highest levels of demand for new fashion items and a lower concern for the environment. Because of this, I sought to complement my study with interviews with young Portuguese female consumers. Within this segment, I chose the female audience since it is the main consumer of fashion in Portugal (Appendix A).

I selected 7 Portuguese women aged between 18 and 24. I chose this sample size since according to Berg Johansen & de Cock (2017), a sample size of 6 to 10, is the appropriate size for a homogeneous population and with similar questions for all respondents. The criteria for selecting the consumers were that they belong to the age group, as well as having an interest in sustainability - although this interest was not always reflected in their purchasing habits. To this end, I carried out a pre-questionnaire to define which young people were eligible. I found the consumers through snowball sampling, as (Ritch, 2015).

3.2. Data collection

Regarding data collection, I collected both primary and secondary data (Appendix C). To collect primary data, I conducted both video and phone interviews, resulting in about 10h of voice recordings. I did all the interviews in Portuguese, then I transcribed them, and translated into English for easier analysis. Both the interviews to the companies and to the consumers were semi-structured, following a guide of open questions.

Regarding the companies, I conducted two interviews for each case with the founders of the companies, except for ISTO where it was not possible to speak with one of the founders. I did the interviews mostly with the founders, as the companies are relatively small and one of the biggest difficulties is lack of time. In other words, the other team members were not available to talk.

Below is a summary table of the most important themes discussed during the interviews.

Table 1 – Summary of company interview themes

Main themes broached during Company's interviews	Company foundation
	Competition
	Business model
	Target
	Sales evolution
	Main difficulties
	Possible solutions to barriers
	Future goals

Source: The author

Furthermore, I also collected secondary data. This type of information was collected to understand the context of the companies studied and consequently to better answer my RQ. Firstly, I collected information from the firm's website. Additionally, I selected documents and articles that included the name of the companies studied and/or keywords such as "sustainability" and "fashion". Some examples of sources are *Máxima*, *Visão*, and *NiT*. I also used some sustainable fashion reports, such as *Ellen Macarthur Foundation (2017) & McKinsey & Company (2020)* as a baseline for the scripting of the interviews.

Regarding consumer interviews, I conducted one interview for each consumer, that is, a total of 7 interviews. Below is a summary table of the most important themes discussed during the interviews.

Table 2 – Summary of consumer interview themes

Main themes broached during Consumer's interviews	Consumer habits in fashion
	Attitudes towards sustainability
	Attitudes towards sustainability in the fashion industry
	Barriers in sustainable fashion consumption
	Possible solutions to barriers

Source: The author

I also collected secondary data, to understand sustainable consumption habits in Portugal. To collect this information, I selected documents and articles that included keywords such as "sustainability" and "fashion". Some examples of sources are Visão and Edited. I also used some sustainable fashion reports, such as Ellen Macarthur Foundation (2017) & McKinsey & Company (2020) as a baseline for the scripting of the interviews.

3.3. Data analysis

To answer the RQ, I analyzed the data from both companies and consumers through coding. First, I selected 2 preliminary codes from the RQ: sustainable fashion and success. Next, I extracted codes from the literature review (Table 3). During data analysis, new codes emerged from the data (Table 4) which led to a new labelling. The result of this iterative process was 52 first-order codes, which I grouped into 8 categories and aggregated into 2 themes, as shown in Appendix D.

Table 3 – Codes from literature review

Codes from Literature Review	Challenges faced by brands	Complex Process
		Time Consuming
		Lack of capital
		Lack of power & influence
		Small size
		Educating consumers
	Challenges faced by consumers	Intention-behavior gap
		Difficulty in accessing information
		Lack of style options
		Limited supply
	Challenges in matching demand and supply	Complex Process
		High Costs
		High Price
		Lack of knowledge from consumers
		Lack of social acceptability
		Lack of trust
		Demand for newness
		Unfashionable clothing
	Possible solutions	Improvement in the design of garments
		Introducing more style options
		Improve sustainability practices
		Marketing
		Use of influencers and celebrities
		Educating consumers
		Government
		Higher quality
		Repair Services
		Rental clothing services
Resale services		
Fashion Library services		
Recycling service		
Increase transparency in supply chain		
Clear and accurate labels		
Assistance service		

Source: The author

Table 4 – Codes from data

New codes from data	Limitation in materials
	Communication with consumers
	Consumer mentality
	Innovation
	Quantity VS Quality
	Location
	Competition (Fast Fashion)
	Lack of support from government
	Fabric is not comfortable
	Traceability
	Decrease price
	Price breakdown
	Improve location
	Cleaning tips QR Code
	Durability
Label portfolio	
Partnerships	
Association of sustainable brands	

Source: The author

Below is an example of the coding process carried out. In this case, a pre-defined code (Marketing) has given rise to a new code (Association of sustainable brands).

Table 5 – Coding examples

Theme	Type of code	Code	Example of Quotes
Possible solutions for the growth of the Portuguese sustainable fashion market	Pre-defined code	Marketing	"Yes, I think it is a good idea to create educational content. It is a difficulty that we have already identified and that we are aware of. This also touches a little on the issue of traceability, which is the difficulty that sustainable brands, since most of them are very independent and very small brands, have to make communications a little more massive and more effective on social networks and other platforms. It is very difficult for a brand like ours to make a great communication, a great campaign, a very well written message on a social network. I think that one option would be to have an association of sustainable brands to join efforts. Although each brand is sustainable in a different way, there is a core message that is shared by most brands. If all the brands got together and managed to find someone who really knew how to create a well-structured campaign with a very effective message to raise public awareness, I think it would be a good thing. It is important to communicate sustainability in the social networks, but there is this limitation, because we are all very small and we do not have the capacity to do it individually. And if we do it individually, the messages will be very scattered, very dispersed and will not have the same effect as a big message."
	New code	Association of sustainable brands	"I think that one option would be to have an association of sustainable brands to join efforts. Although each brand is sustainable in a different way, there is a core message that is shared by most brands. If all the brands got together and managed to find someone who really knew how to create a well-structured campaign with a very effective message to raise public awareness, I think it would be a good thing. It is important to communicate sustainability in the social networks, but there is this limitation, because we are all very small and we do not have the capacity to do it individually. And if we do it individually, the messages will be very scattered, very dispersed and will not have the same effect as a big message."

Source: The author

To conclude, Table 6 presents how I used the different data for my research.

Table 6 – Data sources and use in analysis

Data Source	Type of Data	Use in the Analysis
<p>Interviews (95 pages, 1,15 spaced)</p>	<p>Company Interviews - semi-structured interview with 3 company founder and 1 intern in order to understand business model, difficulties and possible solutions</p>	<p>Familiarize with company foundation, competition, bussines model and target - to construct empirical setting chapter</p>
		<p>Identify main difficulties and possible solutions for sustainable fashion brands to construct findings chapter</p>
		<p>Triangulate with consumers findings to identify common barriers and solutions for findings chapter</p>
	<p>Consumer Interviews - semi-structured interview with 7 consumers aged 18-24 to understand buying habits, barrieris in sustainable fashion consumption and possible solutions</p>	<p>Understanding fashion consumption habits, barriers in sustainable fashion consumption and which solutions may be implemented for consumers to buy more sustainable fashion - to construct findings section.</p>
<p>Documentation</p>	<p>Online articles - 22 online newspaper and magazine articles and blog posts</p>	<p>Support for the development of the empirical setting chapter.</p>
	<p>Secondary Interviews</p>	
	<p>Industry reports - 7 industry reports</p>	<p>Support for the development of the empirical setting chapter. Used as models for writing interview scripts.</p>

Source: The author

IV Empirical Setting

To answer my RQ, I selected 4 cases. The aim of this chapter is to understand some contextual elements of these companies. As such, I present the brand ISTO. (4.1.), Obi (4.2.), FS (4.3) and SIZ (4.4.). All these companies are "born-sustainable" Portuguese fashion brands.

4.1. ISTO.

The brand

“ISTO. is a Portuguese clothing brand focused on high-quality basics, organic materials and transparent pricing and practices” (Veiga, 2019). The brand was founded in 2017 by Vasco, Pedro, and Pedro. The idea emerged due to the frustration that the three partners had as fashion consumers, not only with the way fashion was sold but also with how products were made. It was not easy to find a simple line, with comfortable clothes that would last. Additionally, there was a huge disparity between quality and price, and few sustainable clothes available (Interview, ISTO. intern). Initially only two products were launched: a t-shirt and an Oxford shirt. Over time, more models were added (Belo, 2019). In 2018, due to many requests from the female audience, the brand started selling women's clothes (Cerqueira, 2020).

At this moment ISTO. sells a wide range of products for the male public such as jackets, coats, knitwear, sweatshirts, denim, trousers & shorts, shirts, t-shirts & polos, socks & accessories. It also offers products for the female audience such as knitwear, t-shirts, shirts, denim, beanies, and work jackets (ISTO, n.d.). The company has 7 people working in the office full-time. However, *"we also have some people in the stores and some external people who help us with accounting, digital marketing, etc."* (Interview, ISTO. intern). ISTO. does not have branches in other countries.

Business Model

ISTO.'s business model focuses primarily on *"cultivating a totally transparent relationship with consumers"* (Interview, ISTO. intern). To do so, a price breakdown is made where the consumer can know the costs of each product and the profit margin (Interview, ISTO. intern). Additionally, ISTO. also presents on its website the Portuguese factories it works with. All brand's suppliers have the GOTS and GRS Certification (ISTO, n.d.).

The products are made with sustainable materials, i.e., organic, and natural materials. The quality and durability of the pieces are also very important for the brand - "*We try to make the items as durable as possible*" (Interview, ISTO. intern). ISTO. follows the whole production process. The aim of the brand is to create basic and essential items that people can have in their wardrobe forever, not fashion trends. Furthermore, ISTO. does not make seasonal collections, it has a unique collection available permanently - "*But we also create new garments, because the customers also ask for them*" (Interview, ISTO. intern).

ISTO. is present both in physical shops and online. The brand has three company-owned stores in Lisbon. The ISTO. business model is direct selling, the brand is not present in multi-brand stores, so as not to have to raise prices. The same applies online, no other platforms other than the brand's website are used to sell (Interview, ISTO. intern).

Competition

The main element that distinguishes ISTO. from its competitors is its transparency. ISTO.'s competition are sustainable brands (Interview, ISTO. intern). Some examples abroad are ASKET and Everlane. However, the brand considers it difficult to identify its competition nationally as "*there aren't many brands in Portugal with the same concept and business model as ISTO.*" (Interview, ISTO. intern).

Consumer

Portuguese consumers are already becoming more aware of fashion's environmental problems (Interview, ISTO. intern). However, in other countries this trend is more advanced - "*abroad we are already beginning to see a mentality change, especially among the younger generations*" (Interview, ISTO. intern). ISTO. consumers "*are people who have some awareness of social responsibility and sustainability, but who at the same time like to dress up nicely*" (Interview, ISTO. intern). They are between 26 and 40 years old, and their nationalities differ - "*We have a large presence in Germany, Portugal, France, the UK, Belgium and Italy. We're starting to have a lot in the US and Australia as well*" (Interview, ISTO. intern).

ISTO. can be considered a successful brand in the sustainable fashion market, due to the increase in sales in recent years - between 2020 and 2021 the sales increased by 100%. Another factor that demonstrates the success of ISTO. is that it has gone from being an online brand to

also being present in 3 stores. Additionally, it also went from being a brand solely for men with 2 products, to a brand for both genders with a wide variety of products. Both managers and customers are happy with the brand "*Luckily we have had feedback from customers that meets our analysis*" (Interview, ISTO. intern).

4.2.Obi

The Brand

Obi is a women's sustainable fashion brand, which is not attached to trends and body measurements (NOS, n.d.). Obi was founded in 2015 in Braga, by Cristina and Alice, two friends with several years of experience in the fashion industry who felt a need as consumers "*to have access to quality clothing, with good materials and careful finishing, comfortable, differentiating and durable over time*" (Interview, Obi co-founder). Sustainability was a theme that was present since the creation of the brand, the founders were unhappy with the practices of the fashion industry, the relocations, and level of production. Currently, Obi sells a wide variety of products such as: dresses, jackets, tops, skirts, and accessories (*Obi Clothing*, n.d.). Obi has 5 fulltime workers and some external help when needed. In 2020, due to the pandemic crisis the brand saw the need to create an online platform to sell their products, which allowed them to sell to a bigger market (Interview, Obi co-founder). Obi does not have branches in other countries.

Business Model

Obi produces in a conscious way, using sustainable materials in its production. It uses organic materials, recycled materials, and leftovers from production. The managers are very careful to ensure that the materials are durable, of high quality and easy to maintain. Additionally, production is carried out locally in an atelier - "*our sustainability is not only in terms of production, but also in terms of stock, as we produce small quantities*" (Interview, Obi co-founder). Obi works with the concept of "one piece" and one size fits all. Its suppliers have sustainable concerns. Obi does not have summer and winter collections; its aim is to create timeless and minimalist pieces. Furthermore, it appeals to conscious consumption - "*less is good*" (Interview, Obi co-founder).

Obi is present online and in stores. The brand has its own store in Braga and is also present in eight multi-brand stores in various cities around the country, all with personalized service.

Internationally, it was also present in a multi-brand shop in Toronto and hopes to be again as soon as the pandemic is over. Obi has its own online sales channel and is also present in the online channels of the multi-brand stores (Interview, Obi co-founder).

Competition

Although the brand is aware that there are similar brands on the Portuguese market, it does not worry about that. On the contrary, *"For us it's important that there are other brands with the same concept as ours and which have the same concern as ours"* (Interview, Obi co-founder).

Consumer

Obi's customers are aged between 30 and 65 and are mainly Portuguese, although the company also sells a lot to Spain. The clients have in common a concern for sustainability and the need for personalized service. According to Cristina, *"young people nowadays talk a lot about sustainability, but they don't practice it much"* - which explains the lack of young consumers (Interview, Obi co-founder).

Obi may be considered a successful brand in the Portuguese sustainable fashion market, as it has been growing since 2015 - between 2017 and 2018 the sales increased by 34%. Another factor that demonstrates the success of the brand is being present in 9 stores throughout the country. The managers are happy with the evolution of the brand, especially when they see that clients continue to wear clothes that they bought four years ago (Interview, Obi co-founder).

4.3. Francis Stories

The Brand

FS is a women's Portuguese sustainable fashion brand for modern, sophisticated, and luxurious women who seek fashion with an environmental and social conscience (Fair Bazaar, n.d.). FS was founded in 2018, by Sónia and José. At the time, both were dissatisfied with their careers, and decided to create *"something of our own"* (Interview, FS co-founder). Due to Sónia having a background in fashion, they decided to create a sustainable fashion brand (Interview, FS co-founder). Currently, the brand sells a wide variety of products for the female audience such as: tops, cardigans, trousers & jumpsuits, coats & vests, and scarves (*Francis Stories*, n.d.). The brand has 2 fulltime workers (the founders), plus another person who helps sporadically (Interview, FS co-founder). FS does not have branches in other countries.

Business Model

FS aims to provide customers with the highest quality garments in a sustainable way. A big part of sustainability is consuming less, because of this the brand offers durable products with a high quality and timeless aesthetic. For this, it uses natural and biodegradable materials such as wool. Considering that wool is a raw material that comes from animals, the brand strives to ensure that suppliers are certified by independent organizations for compliance with good practices. The wool is sourced from Australia, as they are the only suppliers that are sustainable and ethical, however production is done entirely in Portugal allowing greater supervision of the production process and a reduction in the carbon footprint of transport. All the brand's partners have sustainable and ethical practices. The brand launches a single collection per year and the products are always available. Their focus is on winter clothing, due to the nature of the type of garments they create (knitted and wool garments) (Interview, FS co-founder).

The brand has three ways of selling: (1) the brand' controlled website; (2) third party websites; (3) and offline points, which are also third party. The third party online and offline points are mainly from other countries - "*At the moment we already sell in Lisbon and Düsseldorf (Germany) offline*" (Interview, FS co-founder).

Competition

The main elements that distinguish the brand from its competitors is its aesthetics and quality. The brand aims to create attractive clothing and considers that sustainability is not its point of differentiation, but something that is mandatory nowadays. For them clothes should have quality on three levels: (1) at the level of the materials used, (2) at the level of the manufacturing of the pieces themselves and at (3) the level of the design itself, it must be a more durable design so that the person does not feel the need to always be buying new pieces to aesthetically update their wardrobe. The managers consider that it is difficult to identify who their competitors are, since it is a recent brand - "*We can think who our competitors are, in the sense of who we want to take sales from, in that case it would undoubtedly be all the fast fashion brands.*" (Interview, FS co-founder).

Consumer

According to the founders, Portuguese consumers are at the same level of awareness of fashion's impact on the environment, as other European countries aware. However, "*in terms*

of action, perhaps less than other European countries, especially the UK, Germany, the Netherlands and other Nordic countries" (Interview, FS co-founder). FS's target audience are women between 25 and 40, financially independent, sustainability conscious and living in countries with long, hard winters - "*Austria, UK, France, the Netherlands, USA, Canada and so on*" (Interview, FS co-founder). FS also has consumers from other countries like Italy, Portugal, and Spain, but the percentage is smaller.

FS may be considered a successful brand in the sustainable fashion market, due to the increase in sales in recent years - between 2020 and 2021 the sales have increased by 50%. The managers are happy with the brand and have plenty of goals for the future (Interview, FS co-founder).

4.4. SIZ

The Brand

SIZ is a women's Portuguese sustainable fashion brand based in Sesimbra. SIZ was founded in 2017, by Raquel and Sofia - twin sisters - who have always had a passion for fashion and wanted to create something of their own as well as be part of sustainable fashion. Currently, the brand sells a wide variety of products such as: dresses, shirts, hats, blouses, jeans, jackets, vests, trenches, etc. Furthermore, it also offers a "Take Back Program" service in which customers can return a SIZ item they do not want and in return receive a 10% discount voucher to use on the brand (SIZ, n.d.). SIZ has 3 fulltime workers, plus an intern. They also have external people, for example the seamstresses who are subcontracted (Interview, SIZ co-founder). The brand does not have branches in other countries.

Business Model

SIZ produces on a small scale, with production taking place in the seamstress's studio 5 minutes' walk from the brand. This way, they are reducing their carbon footprint. Most of the pieces produced are made-to-order, so as not to have stocks and to reduce waste. The brand uses sustainable materials such as organic cotton, Tencel or deadstock fabrics from factories or off-cuts from clothing factories. Each collection has an environmentally related theme to raise awareness. Usually, the brand releases one collection per year, with a winter and a summer drop to take advantage of the materials. However, the previous products are always available if there is fabric stock. A big focus is on transparency, which is why they have a price breakdown of their garments on their website. The brand has three ways of selling: (1) their website; (2)

marketplaces; (3) and offline points abroad and in Portugal, which are also third party (Interview, SIZ co-founder).

Competition

The main factors that distinguish the brand from the competition are its sustainability and the fact that it's "cool" clothing - "*because there are a lot of sustainable fashion brands that in our opinion don't have that look of clothing for young people who like fashion.*" (Interview, SIZ co-founder). According to Raquel, it's difficult to identify the brand's competitors, as they do not sell much in Portugal and abroad the sustainable brands are all very big and cannot be compared to them. However, one thing is certain: "*we don't see fast fashion as competitors, we see it as a threat*" (Interview, SIZ co-founder). \

Consumer

According to Raquel, Portuguese consumers are still not aware of fashion's impact on the environment. The brand's consumers are women between 25 and 50 years old, sustainability conscious of various countries such as - America, Finland, France, Italy, Switzerland. SIZ has few Portuguese consumers, especially when it comes to young people (Interview, SIZ co-founder).

SIZ may be considered a successful brand in the sustainable fashion market, due to the increase in sales in recent years - between 2020 and 2021 the sales increased by 122,857%. Although the brand is recent, both sisters are happy with the brand and have plenty of goals for the future, such as opening a store (Interview, SIZ co-founder).

V

Findings and Discussion

This chapter will answer the RQ on how sustainable fashion brands can be more successful. Firstly, the main barriers and challenges present in the Portuguese sustainable fashion market will be investigated (5.1). Afterwards, possible solutions that could encourage young Portuguese consumers to buy sustainable fashion and therefore foster the success of Portuguese sustainable fashion brands will be presented (5.2). Finally, the conclusion will be presented (5.3.). In this section, the results will also be discussed considering the previous literature.

5.1. Challenges that Portuguese sustainable fashion brands face in the Portuguese fashion market

To enable Portuguese sustainable fashion brands' success in the Portuguese market, their main concerns as well as the concerns of young Portuguese consumers should be investigated. While there are barriers in the meeting of demand and supply such as high costs and prices, there are also specific barriers for companies and consumers.

5.1.1. Challenges in matching demand and supply

High costs & price

Three of the companies interviewed stated that "*The costs are quite high.*" (Interview, Obi co-founder) due to the materials and factories used, as well as the smaller production. High costs are reflected in higher prices for the end consumer. Six of the young interviewees mentioned that one of the main barriers is the fact that Portuguese sustainable fashion is "*super expensive.*" (Interview, Consumer_Frederica). Furthermore, 3 consumers do not know if it is worth paying more: "*I don't know if it's worth buying a more expensive piece of clothing that says it's sustainable, because maybe it's just marketing and there's nothing sustainable about it.*" (Interview, Consumer_Teresa). The companies contacted are aware of consumers' perception of price: "*I know that many people don't buy sustainable products and would like to buy them because they find them expensive.*" (Interview, ISTO. intern). However, some believe that it is also due to other factors, "*In Portugal, unfortunately, salaries don't help people to start investing in sustainable pieces.*" (Interview, SIZ co-founder).

It can be noted that high costs of companies were a barrier mentioned in the literature (Henninger et al., 2016; Pessôa et al., 2015). High price and lack of trust were also mentioned

in the literature (Joy et al., 2012; Kang & Hustvedt, 2014; Mcneill & Moore, 2015; Ritch, 2015). However, according to my study, firms consider that the high price perceived by consumers is due not only to consumers' mentality, but also to the low purchasing power of young Portuguese.

Consumer mentality

Another barrier that affects both consumers and businesses, has to do with people's mentality. Some consumers prefer quantity to quality, "*being cheap you can buy more variety for the same price.*" (Interview, Consumer_Isabel). Companies are aware of this, "*they prefer to have more bad quality pieces than few good quality ones.*" (Interview, SIZ co-founder). Firms consider that this mentality may be due to a lack of knowledge, "*These people (...) do not have the knowledge, (...) that certain pieces will last much longer than others.*" (Interview, FS co-founder). In fact, in the interviews with the consumers it was possible to observe that 6 out of 7 were not aware of the impact of fashion on the environment. There is also some disagreement when it comes to others' perceptions of sustainable clothing, with some thinking "*I would be teased by my friends.*" (Interview, Consumer_Caetana), and others stating, "*I don't think it's very easy to tell if someone is wearing sustainable clothes*" (Interview, Consumer_Teresa) and that "*nobody judges*" (Interview, Consumer_Carolina).

Both lack of knowledge and lack of social acceptance have been mentioned in the literature (Birtwistle & Moore, 2007; Mcneill & Moore, 2015; Pereira et al., 2021). However, no author had mentioned this problem of quality versus quantity. This turns out to be a barrier for Portuguese sustainable fashion brands. However, this might happen due to lack of knowledge and consumerist advertising of other brands, such as Black Friday.

Lack of trust

It was possible to observe that 85% of the interviewees do not trust brands: "*I will always doubt if they are lying to me.*" (Interview, Consumer_Caetana). The lack of confidence is mainly due to greenwashing carried out by several brands, "*There are lots of brands that say they are sustainable, but then they are not.*" (Interview, Consumer_Margarida). The interviewees have a certain difficulty in "*Making sure it's really sustainable.*" (Interview, Consumer_Frederica), as they consider that "*Companies use words like "sustainable" and "eco-friendly" just as a marketing strategy.*" (Interview, Consumer_Teresa). Greenwashing has led to a lack of trust in companies among consumers, also affecting brands that are truly sustainable "*then we have this*

problem of convincing people that being sustainable is not really that, it's something else." (Interview, FS co-founder).

The lack of trust in brands, often derived from greenwashing, is something that has already been mentioned in the literature (Chen & Chang, 2013; Delmas & Burbano, 2011; Henninger et al., 2016; Ritch, 2015).

Demand for newness & unfashionable clothing

When asked about the frequency of clothes consumption, 6/7 interviewees replied that they buy clothes at least once a month. The main reasons they buy every month are: *"I like to keep up with the trends"* (Interview, Consumer_Frederica) and *"I end up getting sick of the clothes"* (Interview, Consumer_Isabel). Additionally, 5/7 respondents consider that *"Another barrier is design."* (Interview, Consumer_Carolina). In fact, one of the respondents considers that *"Sustainable fashion is very hipster."* (Interview, Consumer_Teresa). There is a need to have new, fashionable, and attractive clothes, something that sustainable fashion brands are failing to deliver: *"It is difficult to compete with brands that offer so much variety."* (Interview, ISTO. intern). Furthermore, *"There is still the idea that sustainable brands are very extravagant, that they make pieces that are not usable in everyday life, but this is increasingly not the case."* (Interview, FS co-founder).

Although the association between sustainable fashion and unattractive clothing has already been addressed in the literature (Gam, 2011; Harris et al., 2016; Joergens, 2006; Joy et al., 2012), it is important to highlight in my study this association of sustainable fashion with extravagant or hipster clothing. Furthermore, my study also added as barrier the competition of fast fashion.

5.1.2. Challenges faced by brands

Small size & Lack of capital

The size and the limited financial capacity are also barriers for the companies, as it hinders their success *"financial limitations that any small company has, which doesn't help us with big developments"* (Interview, ISTO. intern), *"we don't have huge communication budgets like those traditional brands, we can't be as visible."* (Interview, FS co-founder). The small size of sustainable businesses and lack of capital is something that had been mentioned in the literature (Caniato et al., 2012; Henninger et al., 2016; Pessôa et al., 2015).

Limitation in materials

The four brands are sustainable and are therefore more limited in the materials they can use for their garments, "*We are a little bit more limited exactly because we want to be sustainable.*" (Interview, ISTO. intern). It is therefore more difficult to innovate. For example, FS uses only wool, which limits the type of clothing it produces "*We will never have a collection that is clearly summer, exactly because of the nature of the pieces.*" (Interview, FS co-founder). The limitation of materials had been mentioned previously in the literature (Ozdamar Ertekin & Atik, 2015). The difficulty in innovating had not been mentioned before.

Complex process

Working on a sustainable fashion brand is a complex and time-consuming process. Firstly, it requires a lot of research, "*The materials used are the ones we consider after a lot of research*" (Interview, ISTO. intern). Additionally, FS states that "*it is not very easy to find suppliers that have these concerns and are willing to share, to be transparent about what they already do and what they don't do.*" (Interview, FS co-founder). According to SIZ, "*doing a small-scale production is much more difficult than doing a large-scale production*" (Interview, SIZ co-founder). However, "*The biggest challenge for us is actually to make sure that we have the whole process right and that we know everything that is going on in the different stages of our value chain.*" (Interview, FS co-founder). This is a constant work "*since everything changes, and they may no longer have those practices.*" (Interview, FS co-founder). All these challenges are time consuming, leaving Portuguese sustainable fashion brands with no time to implement other strategies: "*We have not yet implemented traceability due to (...) lack of time.*" (Interview, ISTO. intern).

In the literature, barriers such as time consumption had already been presented (Hur & Cassidy, 2019). However, it is important to highlight that my study also addressed the difficulty of small-scale production.

Intentions-behavior gap

Another barrier mentioned by two companies is the intentions-behavior gap. The intentions of consumers to make more sustainable purchases do not translate into behaviors: "*I think young people today talk a lot about sustainability but do little about it.*" (Interview, Obi co-founder). This barrier had been referred to in the literature by numerous authors (Joergens, 2006; Mcneill & Moore, 2015; Niinimäki, 2010a).

Communication with consumers

Communication with young consumers is difficult because of their mentality and because of the brand's limited budget. For companies selling online, it is difficult to "*show them through content that we actually have a lot of quality without people touching our clothes.*" (Interview, FS co-founder). Furthermore, the greenwashing carried out by fast fashion makes it difficult to communicate with young people "*eventually consumers perceive "ah, this is sustainable, but it's not that sustainable"*" (Interview, FS co-founder).

Communication with young consumers was a barrier identified by the companies themselves, not present in the literature, which together with limited budget and lack of consumer trust becomes even more difficult.

Lack of support from Government

Finally, it is important to mention that none of the companies receive any kind of support from the Portuguese government: "*I have never heard of a support given by the government.*" (Interview, SIZ co-founder). This barrier was also reported by the companies studied and is not present in the literature and is therefore a contribution of my study.

5.1.3. Challenges faced by consumers

Lack of style options

Of the consumers interviewed, 5/7 stated that the lack of style options is a barrier: "*There needs to be more styles on offer.*" (Interview, Consumer_Teresa). Sustainable fashion is perceived as "*mostly casual clothing*" (Interview, Consumer_Frederica), something that does not meet the needs of young consumers who are also looking for "*party clothes*" (Interview, Consumer_Caetana) and more formal clothes "*sustainable clothes for my job.*" (Interview, Consumer_Margarida). Furthermore, some consumers stated, "*Does it make sense to be spending so much money on something so basic?*" (Interview, Consumer_Frederica). This may be because young consumers associate more expensive clothes with a more sophisticated and formal style, rather than higher quality.

This barrier to sustainable consumption, had already been mentioned in the literature (Beard, 2008; Joergens, 2006). However, it is important to note that young women consumers are looking for sustainable partywear and workwear.

Location of stores

The location of the stores of sustainable fashion brands is also a barrier mentioned several times by the interviewees (5/7). Most young females do not know where the stores are located, “*I don't buy sustainable fashion because I don't see many brands.*” (Interview, Consumer_Isabel). In Portugal, young female consumers like to buy in shopping centers, where they can find several brands: “*If those brands are not there, I will hardly know they exist.*” (Interview, Consumer_Carolina). The fact that some sustainable brands sell only online also represents a barrier as “*you need to buy online without trying on the clothes, and I don't know if they are going to fit me or not.*” (Interview, Consumer_Margarida). This barrier was identified by the young women consumers and is not present in the literature, it is therefore a contribution from my study.

Complex Process

According to the interviewees, buying sustainable fashion is a complex process, “*Currently one must invest a lot of effort and time to find information.*” (Interview, Consumer_Caetana). One interviewee stated that “*An investment in a more sustainable brand would have to be a much more considered purchase.*” (Interview, Consumer_Carolina), as it requires looking at the label to understand what materials were used and how it was made. This type of clothing also requires a more careful treatment, something that represents a difficulty - “*So I end up not buying it because I'm not up to that job.*” (Interview, Consumer_Carolina). Additionally, 3 interviewees complained of lack of information.

Although the difficulty and effort required to access information has already been mentioned in the literature (Pereira et al., 2021), my study has contributed with other barrier to sustainable fashion consumption in Portugal. The cleaning of clothes, must be more careful.

Limited Supply

Another barrier is the supply of Portuguese sustainable fashion. However, this barrier was only mentioned by 2 interviewees who state that “*There are few sustainable choices*” (Interview, Consumer_Isabel). This barrier had already been mentioned in the literature (Joergens, 2006; Pereira et al., 2021).

Quality of materials

Finally, 2 interviewees presented the quality of materials as a barrier. One stated that "*I also think that fabrics are not very comfortable.*" (Interview, Consumer_Caetana). This barrier was a contribution of my study. However, both interviewees had little experience with sustainable products.

Finally, before presenting the solutions it is important to mention that certain barriers mentioned in the literature were not identified in my study. Such is the case of the constant need to reduce the impact on the environment (Popowska & Sinkiewicz, 2021) and the difficulty in educating consumers (Harris et al., 2016).

5.2. Possible solutions to overcome the challenges

This subtopic includes 7 solutions for Portuguese sustainable fashion brands to be more successful and 7 suggestions whose success has not yet been proven as they have not yet been implemented, but which have had a positive reaction from both companies and young female consumers. It also includes other suggestions that were discarded. These suggestions were either mentioned by Industry reports, companies, or consumers.

Improving design and style options

Firstly, 4 consumers consider that "*There has to be a combination between sustainable and aesthetic.*" (Interview, Consumer_Carolina), as well as presenting more styles on offer "*I think they should come up with more options.*" (Interview, Consumer_Isabel). As a solution, brands were presented with the creation of a partnership to improve the design and offer of the clothing. ISTO. showed interest in partnering with another brand –

“making a product that is not in our permanent collection, but that we think consumers would like. However, it wouldn't be a basic one, it would be something that stands out more than the products we already sell.” (Interview, ISTO. intern).

Another solution presented to the brands, was the use of influencers to promote the products to be perceived as attractive and trustworthy, as well as to generate more trust in the brand. From the interviewees, 4 consider that "*I would be more likely to buy if I saw an influencer talking about a brand*" (Interview, Consumer_Frederica). Only FS claimed to use this method to increase brand trust and awareness. ISTO. stated that "*We don't use influencers, we use*

ambassadors." (Interview, ISTO. intern). On the other hand, SIZ and Obi had the same opinion - *"We don't have a very good opinion of today's influencers, because in reality they end up influencing the brands that pay them, instead of advertising something they really identify with."* (Interview, Obi co-founder).

Although solutions such as diversifying styles and improving clothing design have been mentioned in the literature (Beard, 2008; Gam, 2011; Harris et al., 2016), my study furthered this idea. Most of the sustainable brands have a simpler clothing offering which they do not want to change, however, one of the brands reported being willing to create a more extravagant clothing line in partnership with another brand. Partnerships between brands, are therefore a contribution of my study. The use of influencers and celebrities was also recommended in the literature (Birtwistle & Moore, 2007). This solution has proven to be favorable among consumers and some brands. However, my study has shown that there is a lack of influencers in the sustainable fashion area.

Emphasizing quality

Another solution was to emphasize the quality of the garments to justify its price, by displaying the number of times the garment can be worn and washed, on the label. This would also show that the products are of quality and therefore increase trust in the brand. All the consumers thought it was a good idea, *"for people to get a better sense of why they say it's more durable."* (Interview, Consumer_Caetana). This solution would give them *"confidence in the brand."* (Interview, Consumer_Margarida) and *"maybe it's worth paying a higher price."* (Interview, Consumer_Caetana). Only 1 consumer presented a problem: *"at the end of the day, nobody looks at the labels."* (Interview, Consumer_Carolina). On behalf of the brands, ISTO thought it was a good idea and that it *"can really generate sales"* (Interview, ISTO. intern). However, the remaining brands consider it is something quite difficult to achieve since *"the number of times it can be used depends a bit on the care you give to it."* (Interview, SIZ co-founder), *"it may be unreliable and not easy to calculate."* (Interview, FS co-founder), *"people also do not have an exact indication of how many times they have washed their non-sustainable garments (...) so, there would not be a comparison here."* (Interview, FS co-founder).

Another way to emphasize quality, justify prices and increase trust would be with the offer of free repair services of the brand's clothes. The interviewees stated, *"it would give me confidence."* (Interview, Consumer_Margarida) and that *"repair services, would be a big*

reason to buy from that sustainable brand.” (Interview, Consumer_Frederica). This solution is already used by Obi *“we always offer a repair service, regardless of how long that piece has been in use.”* (Interview, Obi co-founder). The remaining brands, though it was difficult to put into practice, because of *“financial reasons”* (Interview, ISTO. intern), *“terms of logistics”* (Interview, SIZ co-founder) and *“what is spent here in shipping and in carbon is a lot. It is highly unsustainable to do that kind of action.”* (Interview, FS co-founder).

Previous literature had stated that the solution was to focus on the benefits of the garment, such as quality (Harris et al., 2016). However, this solution is very broad. My study detailed this solution by introducing on the label the number of times the garment can be worn and washed. This solution was very well received by young women. However, for the brands it was perceived as a good idea, but difficult to implement. Regarding the repair system, which had also been mentioned in the literature (Harris et al., 2016), my study concluded that it is not feasible for all companies.

Improving location

Another solution proposed was for sustainable Portuguese clothing brands to be present in shopping centers. The interviewees considered it a good idea and some stated that *“I would be more inclined to buy.”* (Interview, Consumer_Margarida). However, the 4 brands did not agree with this solution, mostly *“for positioning reasons.”* (Interview, ISTO. intern). This solution was also a contribution of my study. Despite being very well received by young women, companies do not intend to implement this solution.

Educating consumers

One solution given by the interviewees, is to offer more information: *“I think they should show how the fashion industry affects the environment.”* (Interview, Consumer_Isabel), *“more information about where to buy and the benefits of sustainable fashion.”* (Interview, Consumer_Caetana), *“people need to understand the types of fabric (...) this way they will know if a product is sustainable or not.”* (Interview, Consumer_Teresa). Education would make consumers more knowledgeable and therefore change the mindsets of young people. It would also make the process of choosing clothes less complicated and encourage young people to move from intention to action. When asked about this solution, ISTO and SIZ said they were already sharing educational content,

“We often make posts that we consider informative posts. And in our newsletter, those who subscribe receive weekly content about sustainability.” (Interview, ISTO. intern).

However, SIZ stated that *“we don't get positive reactions when we share informative content”* (Interview, SIZ co-founder). The other two brands considered it a good solution. However, they felt that *“I think that much more important than brands transmitting this, is to transmit these values in schools and at home.”* (Interview, Obi co-founder).

Consumer education can be done through the creation of content on social networks. Furthermore, one interviewee said that they should also invest in marketing *“They should do more advertising so that this is seen as something “cool”.”* (Interview, Consumer_Beatriz). Marketing can help change the mindset of consumers as well as show that there is sufficient supply of sustainable brands. SIZ despite liking the solution, stated that *“We don't do paid advertising on social media.”* (Interview, SIZ co-founder), mostly because they are limited in budget. On the other hand, FS discussed the difficulty sustainable fashion brands have in making *“communications a little more massive and more effective on social networks.”* (Interview, FS co-founder), because of its size. However, the co-founder suggested that

“I think that one option would be to have an association of sustainable fashion brands to join efforts (...) If all the brands got together and managed to find someone who really knew how to create a well-structured campaign with a very effective message to raise public awareness, I think it would be a good thing.” (Interview, FS co-founder).

Consumer education, referred to in the literature (Gam, 2011; B. Shen et al., 2012), is something that both companies and young women agree on. My study identified some points of interest on the part of young women, such as: the impact of fashion on the environment, the benefits of buying sustainable fashion, where to buy, the types of sustainable materials, etc. My study also identified a need from companies, for government collaboration in this area. The use of marketing had also been mentioned in the literature (Jang et al., 2012). Furthermore, my study has also contributed with a new solution: the creation of a Portuguese sustainable fashion brands association that will improve the communication with consumers.

Implementing Clothing Rental services

Another solution was the offer of additional services to satisfy the desire for variety and new things and make this type of brand more attractive, encouraging a shift from intention to action. The first service presented was clothing rental. Of the interviewees, only 1 was completely interested in this service, "*I am interested in renting clothing for party clothes, for example a wedding as I won't use that much that piece of clothing.*" (Interview, Consumer_Caetana). Two interviewees said they felt uncomfortable wearing clothes worn by others. They would only use this service if "*I would have to be sure that the brand had certain care such as sanitization and cleanliness.*" (Interview, Consumer_Frederica). Only 1 consumer was against this service "*renting is money thrown away because in the end you don't get anything.*" (Interview, Consumer_Carolina). Regarding brands, two said they disagreed because "*At ISTO as it is a brand of essentials and basics, we will hardly have capsules or special party collections.*" (Interview, ISTO. intern) and "*we promote our clothes as high quality to stay in our consumers' wardrobes for a long time*" (Interview, FS co-founder). The remaining brands want to implement this service, "*I think that the idea of renting clothes is great.*" (Interview, Obi co-founder).

This solution, mentioned earlier in the literature (Harris et al., 2016), has generated some controversy. Firstly, there is still some stigma towards shared clothing. However, my study has identified a possible solution to combat the stigma and therefore implement this model of renting clothes: brands would have to take care of the sanitization and cleaning of the clothes and would have to communicate the whole process in detail. Secondly, it was possible to see that some brands are interested in this solution while others do not agree.

Offering Fashion Library services

The second service presented was the Fashion Library. Several interviewees were interested, as "*Maybe it would be useful to try things on and if I liked them, I would buy them.*" (Interview, Consumer_Caetana) and "*I could even have a variety of clothes that I won't get tired of.*" (Interview, Consumer_Carolina). However, some barriers to this service were: "*it would depend on the price and the brand's clothing offering.*" (Interview, Consumer_Frederica); "*it's uncomfortable for me to be sharing clothes with other people.*" (Interview, Consumer_Margarida); "*I would join if I knew that the borrowed clothes that have passed through many hands are in good condition and clean.*" (Interview, Consumer_Teresa). ISTO. and FS disagreed for their positioning. SIZ stated that it wants to implement a rental system but

“I don't know if it would be in those subscription terms or if it would be rental of individual pieces.” (Interview, SIZ co-founder). Obi also found it interesting, *“Maybe one day Obi will decide to have that facility.”* (Interview, Obi co-founder).

The Fashion Library model was referred to in the literature (Todeschini et al., 2017), not as a solution, but as something that has been used by some brands. In this case, my study observed some controversy among brands. On the other hand, young women showed interest, although there are some barriers. Therefore, my study contributed by identifying barriers that would have to be overcome to implement this model.

Offering Resale services

The third service presented is a resale service that would allow young people to have sustainable clothing at a cheaper price, as well as selling clothes that they are tired of. Overall, the interviewees had a positive response: *“The price would be lower and therefore younger people who have less budget could buy sustainable fashion.”* (Interview, Consumer_Caetana) and *“If it's in good condition and sanitized, then yes, I would buy it.”* (Interview, Consumer_Teresa). However, one interviewee said it would depend on whether she was given the money for the sale or a discount voucher at the store, *“I don't want to be stuck in one shop.”* (Interview, Consumer_Carolina). ISTO. welcomed the idea, as it has already implemented something similar. In recent months, the brand held an event in its stores selling clothes

“that were damaged, with small defects or that were not damaged, but that had been used in photo shoots and therefore we couldn't sell them. And we really saw that this was a success, people, especially the younger ones, prefer to buy more affordable clothes.” (Interview, ISTO. intern).

SIZ also has a reselling program, however *“As we are a recent brand, it hasn't been 5 years yet, we haven't had any garments returned to us yet.”* (Interview, SIZ co-founder). Obi thought it was an interesting solution that has a lot to do with its concept. Only FS stated that, *“Resale ends up being a little bit against what is one of our first objectives which is to deliver high quality clothes.”* (Interview, FS co-founder).

This type of service was also mentioned as something that has been used by brands in literature (Todeschini et al., 2017). My study has shown, that in practice this service is something

interesting for both consumers and brands. It is important to highlight the action carried out by ISTO. of selling defective clothes or clothes that have been used in photo shoots at a more affordable price to young people. This could also be a solution.

Implementing a recycling program

Finally, another solution presented was the implementation of a recycling program that in return gives customers a discount on the brand, encouraging a shift from intention to action, since the price is cheaper. All interviewees showed interest in this program. ISTO. and Obi thought it was a good idea, *“Yes, that's what we'd like to do in the future.”* (Interview, ISTO. intern). SIZ claimed to have already implemented this program. However, *“so far no one has taken advantage of it.”* (Interview, SIZ co-founder), probably because the brand does not have a store, and the clothes have to be sent by mail. This solution had already been mentioned in the literature (Todeschini et al., 2017), not as a solution, but as something that has been used by some brands.

Introducing a QR Code with cleaning tips

Another solution mentioned was the implementation of a QR Code with tips on cleaning and maintenance of clothes. According to the interviewees, it was considered *“very helpful”* (Interview, Consumer_Margarida), since *“if people don't know how to wash it, even though it is of higher quality, it will be damaged in 2 or 3 washes.”* (Interview, Consumer_Teresa). Nevertheless, two barriers were identified: *“However, if no one told me about the QR code I probably wouldn't notice”* (Interview, Consumer_Frederica) and

“I cut out all the labels (...) there should be a way for me to save the labels of my clothes. Like a label portfolio.” (Interview, Consumer_Carolina).

All brands already have information about cleaning and maintenance on their website, except ISTO. which will launch soon. Although some brands like SIZ thought it was a good idea, two brands considered it to be a *“little difficult to talk about that on a label.”* (Interview, Obi co-founder) and that *“there are many things that we can put in the QR code that are relevant (...) however, you can't put everything on a label”* (Interview, ISTO. intern).

This solution was a contribution of my study, not having been mentioned in the literature. The feedback from the young women was mostly positive. However, it is important to point out that

some young women cut the labels. Companies are already talking about this topic, but they find it difficult to do it on a label. Therefore, another solution resulting from my study was the creation of an online portfolio of labels where consumers could check how they should wash each item of clothing.

Increasing transparency in the supply chain

Two solutions were presented to increase transparency and tackle the lack of trust in brands: traceability and price breakdown. All interviewees had a positive reaction towards traceability “*my confidence in the brand would increase.*” (Interview, Consumer_Carolina), except for one interviewee “*It wouldn't increase my confidence, only if there was a regulatory body that controlled this.*” (Interview, Consumer_Caetana). Currently, none of the brands have this system implemented, although they thought it was a good idea. ISTO. stated that “*It is a goal for 2022 to achieve 100% traceability.*” (Interview, ISTO. intern). FS wants to implement this system. SIZ and Obi, would like to implement this solution, but they thought that “*it is not always very viable for small brands.*” (Interview, SIZ co-founder). Therefore, they will try to do it themselves.

Price is also a barrier for young Portuguese consumers, something that brands are aware of. Thus, price breakdown is a solution to increase transparency and justify high prices. The reactions to this solution were mostly positive, “*That would give me more confidence in the brand.*” (Interview, Consumer_Teresa). The only barrier presented is that

“every time I buy a piece of clothing, I won't be looking at everything written on the label. I don't have time to.” (Interview, Consumer_Carolina).

Some brands have already implemented this solution, ISTO. does it for each product individually while SIZ presents the general price breakdown of their pieces. Obi stated: “*I'd like to bet on this for the future because it's a transparent way to justify the selling price.*” (Interview, Obi co-founder). However, FS will not implement this solution due to its positioning.

Both the traceability and the price breakdown had not been previously mentioned in the literature. The only thing that had been mentioned as a solution was increasing transparency (Beard, 2008; Harris et al., 2016; Henninger et al., 2016; B. Shen et al., 2012), yet no author

had identified how to do this. The traceability proved to be a success both among consumers and brands who want to implement this. Price breakdown was also a successful contribution of my study, as both brands and consumers were happy with this solution.

Throughout this chapter it was possible to demonstrate that brands can improve their performance among young people with the implementation of some strategies. However, there are other stakeholders that can be involved with actions that companies unfortunately cannot take. For instance, the government could play a key role in encouraging sustainable fashion consumption, something that had already been mentioned in the literature (Harris et al., 2016). Through my study, it was possible to identify some ideas of actions that can be taken by the government: "*I would simply be happy with the VAT being different for sustainable fashion brands*" (Interview, SIZ co-founder); "*I also think this topic should be talked about more in schools.*" (Interview, Consumer_Caetana); "*Having a part of the IRS that is reimbursed for all the sustainable decisions you make.*" (Interview, Consumer_Carolina); "*I think they could also create workshops in schools, for people to learn how to sew their clothes.*" (Interview, Consumer_Isabel).

5.3. Summarizing table

The following table presents a summary of the challenges identified by some Portuguese sustainable fashion brands and the corresponding solutions, which answer my RQ.

Table 7 – Possible solutions to the challenges

Challenges	Possible Solutions	Brands			
		ISTO.	Obi Clothing	Francis Stories	SIZ
High costs & price	Price Breakdown	✓	✓	X	✓
	Resale services	✓	✓	X	✓
	Repair services	X	✓	X	X
	Recycling Program	✓	✓	-	✓
	Durability	✓	X	X	X
	Sell defective/used clothes from photo shoots at a cheaper price	✓	-	-	-
Consumer Mentality	Educating consumers	✓	✓	✓	✓
	Marketing	✓	✓	✓	X
	Use of influencers and celebrities	✓	X	✓	X
	Durability	✓	X	X	X
	Creation of an association of sustainable brands	-	-	✓	-
Lack of Trust	Creation of an association of sustainable brands	-	-	✓	-
	Price Breakdown	✓	✓	X	✓
	Use of influencers and celebrities	✓	X	✓	X
	Repair services	X	✓	X	X
	Durability	✓	X	X	X
	Traceability	✓	✓	✓	✓
Demand for newness & unfashionable clothing	Partnerships	✓	X	X	X
	Marketing	✓	✓	✓	X
	Clothing Rental Services	X	✓	X	✓
	Fashion Library services	X	✓	X	✓
	Resale services	✓	✓	X	✓
	Use of influencers and celebrities	✓	X	✓	X
	Recycling Program	✓	✓	-	✓
	-	-	-	-	-
Small size & Lack of capital	-	-	-	-	
Limitation in materials	-	-	-	-	
Complex Process - brands	-	-	-	-	
Intentations - behavior gap	Educating Consumers	✓	✓	✓	✓
	Clothing Rental Services	X	✓	X	✓
	Fashion Library services	X	✓	X	✓
	Resale services	✓	✓	X	✓
	Recycling Program	✓	✓	-	✓
	Use of influencers and celebrities	✓	X	✓	X
	Sell defective/used clothes from photo shoots at a cheaper price	✓	-	-	-
Communication with consumers	Creation of an association of sustainable brands	-	-	✓	-
Lack of support from Government	Support from Government	-	✓	✓	✓
Lack of style options	Partnerships	✓	X	X	X
	Fashion Library services	X	✓	X	✓
	Clothing Rental Services	X	✓	X	✓
Location of stores	Be present in shopping centers	X	X	X	X
Complex Process - consumers	Educating consumers	✓	✓	✓	✓
	Cleaning tips QR Code	✓	X	-	✓
	Online Label Portfolio	-	-	-	-
Limited Supply	Marketing	✓	✓	✓	X
Quality of materials	Fashion Library services	X	✓	X	✓
	Clothing Rental Services	X	✓	X	✓
	Durability	✓	X	X	X
	Repair services	X	✓	X	X

Table legend	
✓	Already implemented suggestion
✓	Accepted suggestion but not implemented
X	Rejected suggestion

Source: The author

VI Conclusion

The fashion industry is responsible for 10% of Global carbon emissions (McKinsey & Company, 2019). Some sustainable fashion brands have emerged over the years due to consumer demands for more sustainable business practices. However, these companies are facing challenges in implementing sustainability such as high costs as they have a small amount of production (Henninger et al., 2016) Nevertheless, consumers are also responsible for the fashion's impact on the environment. Despite the growing awareness of the need to seek sustainable alternatives (Ritch, 2015), an intention-behavior gap among young people is still visible due to several barriers to sustainable fashion (Joergens, 2006; McNeill & Moore, 2015; Niinimäki, 2010a). Some possible solutions were presented to encourage sustainable fashion consumption. Nevertheless, it remains unclear if these have been implemented and are successful, and whether new solutions have emerged in the meantime.

Through this qualitative study, I was able to answer the RQ about how sustainable fashion brands can be more successful, by analyzing the different opinions and experiences of the four Portuguese companies studied as well as that of the young Portuguese women consumers and comparing with the existing literature.

My study revealed that for sustainable fashion brands to be more successful, it is necessary to implement 7 solutions that meet the needs of young consumers. These solutions have already been implemented by some brands and have been successful. The first solution is the implementation of a Price Breakdown to justify high prices, as well as to overcome the lack of trust in sustainable clothing brands. Secondly, educating young consumers is very important to change their mindset, show them that buying sustainable fashion is not complex and therefore move them from purchase intention to action. Marketing is another tool that can be used to associate sustainable fashion with something cool and attractive to young people, as well as to show that in fact there are plenty of sustainable fashion brands. Within marketing, the use of influencers or ambassadors is a good tool to increase brand trust as well as to be perceived as cool. Resale services are a great solution to encourage sustainable fashion consumption among young people as it allows them to buy at a more affordable price and enables them to sell clothes, they are tired of. Another approach to this solution is to sell faulty garments or garments that have been used in photo shoots at a cheaper price, something that is already being

implemented by some brands. Finally, the recycling program is also a solution for the success of sustainable fashion brands since it provides discounts for young people, therefore encouraging the purchase of sustainable fashion. Additionally, it also makes it possible for clothes that are no longer being worn to be reused to create new items. Furthermore, my study suggests 7 possible solutions whose success has not yet been proven as they have not yet been implemented, but which have had a positive reaction from both companies and young female consumers. Firstly, Traceability is a possible solution to increase trust in sustainable brands. Another way to increase young people's trust in sustainable fashion brands is by creating a sustainable fashion brands' association, something that also facilitates communication with young people and can help change their mindset. To make the process of buying sustainable fashion easier for young people, a QR Code with cleaning tips and an Online Label Portfolio could be implemented, since many young customers cut the labels and this way, they could know how to wash their clothes. Another possible solution is to create partnerships with brands or celebrities to make the clothes more attractive and create more styles on offer. The creation of additional services, such as Clothing Rental services and Fashion library services allows young consumers to rent the products at a lower price and check if they are of good quality. Additionally, these two services are an excellent solution to address young consumers' desire for variety and novelty and can therefore move consumers from purchase intentions to action.

Despite this, my study has some limitations. As explained in the methodology, I could not in talk to a manager all case studies as I had expected. Furthermore, I could not interview other members of the companies to get more perspectives and opinions. I had also some time constraints, which did not allow for more interviews with young female consumers. Finally, to answer this research question I analyzed the Portuguese market, therefore the results cannot be generalized.

To conclude, I think it is interesting as future research to use other qualitative methods to better understand this phenomenon, as well as quantitative methods to test through hypothesis if the solutions presented have a quantitative impact on sustainable fashion consumption. This study can also be carried out in other countries, to understand if culture and purchasing power have an impact. I also think it would be interesting to look for other solutions to the barriers that were left unsolved.

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VIII Appendices

Appendix A – Users of fashion in Portugal by gender



Source: Statista Global Consumer Survey

Appendix B – Contacted firms

Company	Contact Status
BYOU	No response
Baseville	No response
Náz	No response
ISTO.	Willing to participate
IVORY	Willing to participate, though tardy
GUAJA.	No response
Dream Catchers	No response
Green Kiss	No response
Haura	No response
SIZ	Willing to participate
Francis Stories	Willing to participate
Obi Clothing	Willing to participate
Hyena	No response
Bona Fide	No response
Benedita Formosinho	No response
Oh, Monday!	No response
Nazareth	No response
Cheza	No response

Source: The author

Appendix C – Primary and secondary data

Primary Data - ISTO						
#	Type of Data	Brand	Interviewee	Occupation	Date	Length
1	Interview	ISTO	Sofia Cambim	Customer Experience & Marketing Intern at ISTO.	08-Nov	33 min
2	Interview	ISTO	Sofia Cambim	Customer Experience & Marketing Intern at ISTO.	06-Dec	20 min

Secondary Data - ISTO					
#	Type of Data	Title	Author	Organization	Date
1	Website	ISTO website	ISTO	ISTO	2021
2	Magazine Article	ISTO. É a Marca Masculina que Queremos Vestir Agora	Carlota Morais Pires	Máxima	2017
3	Website	Real People: Pedro Palha Brings Back Transparency	Filipa Veiga	Fair Bazaar	2019
4	Magazine Article	ISTO.: Esta marca portuguesa tem básicos bonitos (e simples) para homem	Inês Belo	Visão	2019
5	Magazine Article	A nova coleção da ISTO, a marca sustentável portuguesa que diz em cada peça o seu custo de produção	Marta Cerqueira	MAGG	2020
6	Magazine Article	ISTO. Ao comprar esta roupa sabe mesmo o que está a pagar	Marta Cerqueira	MAGG	2019
7	Website	ISTO. – A new Portuguese menswear brand	Francisca Soares	Taste of Portugal	2019
8	Magazine Article	ISTO: a nova marca de roupa do autor de um Azar do Kralj	Sara Chaves	NIT	2017
9	Newspaper Article	ISTO é a marca de moda mais honesta do momento	Mauro Gonçalves	Observador	2017
10	Website	ISTO.: nova marca portuguesa de luxo certificada aposta em produtos naturais para fazer durar vestuário	Helena Osoorio	Fashion Network	2021
11	Magazine Article	Vestuário sustentável: Estas marcas portuguesas querem um consumo mais pensado	Margarida Silvestre	Visão	2021

Primary Data - Obi Clothing						
#	Type of Data	Brand	Interviewee	Occupation	Date	Length
1	Interview	Obi Clothing	Cristina Covas	Co-founder and Accounts Manager - Obi Clothing	12-Nov	51 min
2	Interview	Obi Clothing	Cristina Covas	Co-founder and Accounts Manager - Obi Clothing	01-Feb	50 min

Secondary Data - Obi Clothing					
#	Type of Data	Title	Author	Organization	Date
1	Website	Obi Clothing Website	Obi Clothing	Obi Clothing	2021
2	Website	OBI Clothing - Letting Go of Tendencies and Measurements	Braga Cool	Braga Cool	-
3	Website	Casos de Sucesso - Empreendedores de sucesso explicam como nasceram os seus negócios	NOS	NOS	-

Primary Data - Francis Stories						
#	Type of Data	Brand	Interviewee	Occupation	Date	Length
1	Interview	Francis Stories	José Oliveira	Co-founder - Francis Stories	15-Nov	58 min
2	Interview	Francis Stories	José Oliveira	Co-founder - Francis Stories	10-Dec	39 min

Secondary Data - Francis Stories					
#	Type of Data	Title	Author	Organization	Date
1	Website	Francis Stories Website	Francis Stories	Francis Stories	2021
2	Website	Francis Stories Co-founder Tells us her story	Gabriela Godinho Moxon	CAROLINAGMX	2020
3	Magazine Article	Today in Our Lens: Francis Stories	Daria Müller Velasquez	Staiy Edit	2021
4	Magazine Article	A Conversation With: Sustainable Brand Francis Stories	Mona	ASHIFT	2020
5	Website	Behind The Brand: Francis Stories	Stephanie Hogg	Gather & See	2019

Primary Data - SIZ						
#	Type of Data	Brand	Interviewee	Occupation	Date	Length
1	Interview	SIZ	Raquel Rodrigues	Co-founder and fashion designer - SIZ	18-Nov	42 min
2	Interview	SIZ	Raquel Rodrigues	Co-founder and fashion designer - SIZ	07-Dec	19 min

Secondary Data - SIZ					
#	Type of Data	Title	Author	Organization	Date
1	Website	SIZ Website	SIZ	SIZ	2021
2	Website	Designer Spotlight: SIZ	ERINALYSSE	Garmentory	2019
3	Magazine Article	SIZ - The Brand with Sustainable Roots	Giorgia Dallasio	SBP Magazine	2021
4	Website	Sustainable Rating - SIZ	Sustainable Brand Platform	Sustainable Brand Platform	2021

Primary Data - Consumers						
#	Type of Data	Interviewee	Age	Occupation	Date	Length
1	Interview	Caetana A.	18	Student	22-Oct	54 min
2	Interview	Teresa C.	23	Student	02-Nov	40 min
3	Interview	Frederica V.	21	Student	02-Nov	35 min
4	Interview	Beatriz F.	24	Working	02-Nov	32 min
5	Interview	Margarida B.	22	Working	02-Nov	48 min
6	Interview	Carolina C.	22	Working	03-Nov	57 min
7	Interview	Isabel RF.	20	Student	09-Nov	25 min

Secondary Data - Consumers					
#	Type of Data	Title	Author	Organization	Date
1	Magazine Article	Só 8% dos portugueses compra frequentemente roupa em 2ª mão	Luísa Oliveira	Visão	2021
2	Magazine Article	52% dos consumidores portugueses já compram produtos sustentáveis	Rafael Correia	Distribuição Hoje	2021
3	Website	90% dos consumidores portugueses priorizam a sustentabilidade	Smart Planet	Smart Planet	2021
4	Industry Report	The sustainability edit 2021	Edited	Edited	2021

Secondary Data - Context Industry					
#	Type of Data	Title	Author	Organization	Date
1	Newspaper Article	Consumidores portugueses querem que marcas se comprometam com práticas sustentáveis	Agência Lusa	Diário de Notícias	2020
2	Magazine Article	52% dos consumidores portugueses já compram produtos sustentáveis	Rafael Correia	Distribuição Hoje	2021
3	Industry Report	The sustainability edit 2021	Edited	Edited	2021
4	Industry Report	A new textiles economy: redesigning fashion's future	Ellen Macarthur Foundation	Ellen Macarthur Foundation	2017

5	Industry Report	Fashion on Climate - How the fashion industry can urgently act to reduce its greenhouse gas emissions	McKinsey & Company	McKinsey & Company	2020
6	Industry Report	The State of Fashion 2021	McKinsey & Company	McKinsey & Company	2021
7	Industry Report	Survey: Consumer sentiment on sustainability in fashion	McKinsey & Company	McKinsey & Company	2020
8	Industry Report	Fashion from Portugal 4.0	Associação Têxtil e Vestuário de Portugal	Associação Têxtil e Vestuário de Portugal	2019
9	Industry Report	Ethical Fashion Global Market Report 2021: COVID-19 Growth and Change to 2030	Research and Markets	Research and Markets	2021
10	Webpage	Why Responsible Brands Are Choosing Northern Portugal to Manufacture Garments	Mariana Costa	True to Size	2021

Source: The author

Appendix D – Coding Table

Themes	Categories	First-order codes	Carliana A.	Teresa C.	Frederica V.	Beatrix F.	Margarida B.	Carolina C.	Isabel B.	Company 1 - ISTO	Company 2 - Obi Clothing	Company 3 - Francis Stories	Company 4 - SIX	
Challenges in the Portuguese sustainable fashion market	Challenges faced by brands	Limitation in materials	-	-	-	-	-	-	-	"I think the biggest challenge is finding new angles and new ways to innovate that maybe the bigger fast fashion brands can do more easily because they have a lot of materials they can use. We are a little bit more limited exactly because we want to be sustainable."	-	"By the nature of the type of garments that we create, which are essentially knitwear and wool garments, it makes perfect sense that we have a greater focus on winter clothing. We will never have a collection that is clearly summer, exactly because of the nature of the pieces."	"We buy those leftovers (they're really small pieces, for example 40x40cm, little squares of denim like this, sometimes it's just narrow pieces that look like they're left over between two pieces of jeans)."	
		Complex Process	-	-	-	-	-	-	-	-	-	"It is increasingly easy to find these ethical suppliers, but it is still difficult. This is perhaps the most difficult part of the business because we cannot in good conscience say that we are sustainable and ethical, and then not know what is going on or have suppliers that are part of our value chain that have black points, that have parts that we cannot understand." "But in fact, it is not very easy to find suppliers that have these concerns and are willing to share, to be transparent about what they already do and what they don't do." "The biggest challenge for us is actually to make sure that we have the whole process right and that we know everything that is going on in the different stages of our value chain. To make sure that we are working with people who are telling us the truth in terms of what their practices are. And to have these suppliers who have these practices, this awareness and who are certified for this." "It is a constant work since everything changes and they may no longer have those practices. We have to guarantee that they continue to do so." "We have to keep ourselves informed about what they are doing and new practices. This is the greatest difficulty for us because if we are not aware of everything that intrinsically happens in our chain it will be difficult to do what for us is our second greatest difficulty, which is to pass this message to consumers."	"I've never had a non-sustainable brand either, but I would say that Production is very difficult. We have to check the suppliers. We try to do everything right. Raw materials are hard to get, we always have to choose the best. And also doing a small-scale production is much more difficult than doing a large-scale production and managing everything because as we don't want to have stock to have leftovers and burn. And in terms of stock it's also much more difficult because if we had 100 items made straight away it would be easier to manage. But making them in small batches is more difficult."	
		Lack of support from government	-	-	-	-	-	-	-	-	"I don't think we have any support from the government."	"we are not receiving any help from the government."	"We don't have any support from the government."	"I have never heard of a support given by the government."
		Innovation	-	-	-	-	-	-	-	-	"I think the biggest challenge is finding new angles and new ways to innovate that maybe the bigger fast fashion brands can do more easily because they have a lot of materials they can use. We are a little bit more limited exactly because we want to be sustainable." "financial limitations that any small company has, which doesn't help us with big developments."	-	-	-
		Time Consuming	-	-	-	-	-	-	-	-	"The materials used are the ones we consider after a lot of research, after seeing how the competition does it." "We have not yet implemented traceability due to lack of resources, lack of time."	-	"It is increasingly easy to find these ethical suppliers, but it is still difficult." "But in fact, it is not very easy to find suppliers that have these concerns and are willing to share, to be transparent about what they already do and what they don't do." "The biggest challenge for us is actually to make sure that we have the whole process right and that we know everything that is going on in the different stages of our value chain. To make sure that we are working with people who are telling us the truth in terms of what their practices are. And to have these suppliers who have these practices, this awareness and who are certified for this."	"We start by designing the pieces and when we have the collection well defined, we go to our seamstress, who happens to be 5 minutes away from our atelier. We go through each piece with her, and she makes prototypes. It's a process that sometimes takes a long time, until the prototype is the way we really want it, it depends a lot on her availability." "We already try to do as much as we can to inform consumers of the fashion industry's impact on the environment. We just don't do more because we don't have time." "I would say that Production is very difficult. We have to check the suppliers. We try to do everything right."

Themes	Categories	First-order codes	Carolina A.	Teresa C.	Frederica V.	Beatriz F.	Margarida B.	Carolina C.	Isabel R.	Company 1 - 515D.	Company 2 - Obi Clothing	Company 3 - Francis Stories	Company 4 - 51Z
		Lack of capital	-	-	-	-	-	-	-	"financial limitations that any small company has, which doesn't help us with big developments"	-	"we don't have huge communication budgets like those traditional brands, we can't be as visible."	"I don't know if we reach everyone well, maybe because we needed to invest more in advertising." "but we also don't have much money to invest in advertising." "We have almost no means to do what we're doing."
		Lack of power & influence	-	-	-	-	-	-	-	"But in Portugal people are also starting to understand the impact of fashion on the environment, although I think we are still a little bit undervalued in Portugal (the smaller brands)."	-	"At this moment we are sustainable in terms of profit, but we also do not have a large dimension, so if there is some external fact that is more negative for our business, maybe we are not so safe."	-
		Small size	-	-	-	-	-	-	-	"financial limitations that any small company has, which doesn't help us with big developments"	"Obi is a small niche company"	"The greatest difficulty in attracting clients has to do with the trust that a brand that does not have a great notoriety has to generate with new audiences." "At this moment we are sustainable in terms of profit, but we also do not have a large dimension, so if there is some external fact that is more negative for our business, maybe we are not so safe."	"Besides that, being a sustainable brand, we grow much slower because if we were less sustainable, we would be able to grow faster because we would have less expenses and we would do things in a much less ethical way."
Challenges in the Portuguese sustainable fashion market	Challenges faced by brands	Intentions behavior gap	"Yes, sustainability is an important theme for me. I try my best to use durable products in everyday life, for example opting for glass bottles instead of plastic bottles. I sometimes buy recycled clothes, but that's not the deciding factor that makes me buy. Other than that, I don't do much more." "I honestly don't think about sustainability when buying clothes. If I like the shirt I'll buy it, and if it's sustainable that's better. But I don't think about it much. I think we should think about it, but when I'm buying clothes, I don't think about it. I just think about the aesthetic part, if it's cute and if it looks good on me."	"Sustainability is very important for me. I am trying to be a bit more conscious about my purchases. In other words, if I'm buying a piece of clothing, I try to choose the one that will last me the longest and which has the best quality. I also think that to be more conscious in our shopping, we need to be aware of the trends. If I know that this year the fashion color is purple, I won't be buying more black things that I already have. I'll buy the fashion color. It's a question of avoiding doing the same shopping over and over again. I also try to be conscious in my daily life: doing the laundry, brushing my teeth, taking a shower, on my means of transport. For example, I try to choose the most efficient route so as not to go back and forth and waste petrol and pollution."	"Yes, sustainability is an important topic for me. I recycle, I don't say it's all the time but I try to recycle. I'm looking for sustainable fashion alternatives, definitely. I've been doing research on it. I also sell second-hand clothes and try to buy second-hand to reuse. And I think that's it. I don't think I do that much more."	"Sustainability is really important for me! Regarding coffee, I have a machine that can be used several times instead of having the capsules themselves. I recycle. I buy a lot of clothes in second-hand shops. I also have a lot of clothes that belonged to my mother and my aunts that I try to use. The clothes I don't use I sell or give to institutions so they can be used by other people instead of piling up at home. I also use a bamboo brush."	"I am concerned with the environment. I do recycling and obviously I don't throw things on the floor."	"I don't think about sustainability when buying fashion clothing, honestly. I don't remember it."	"At the moment, I cycle a lot more, but also because I live in Amsterdam. So I don't drive so much anymore and I opt a lot for public transport, but that's what I've always opted for. Recycling I think is something that should not even be mentioned, because it should be part of everyone's life. I don't throw rubbish on the ground, whether it's cigarette butts, paper or plastic. I always try to find options that don't involve plastic in supermarkets. I don't take plastic bags to put fruit in. I usually take them from home. Another thing, I take back a lot of clothes. I usually keep my mum's clothes, and what we don't use anymore we usually donate. I know that my clothes right now are being used by someone, and it wasn't sold, it was all donated. I try to have a more circular economy in that respect. Unless they're in really bad condition, then there's nothing I can do. But everything that is minimally good, but that I no longer like, I try to give to someone who will use them."	"I think the most sustainable measure I've taken so far was instead of ordering a petrol car it was a hybrid. I would like to be more sustainable and I've tried to be more sustainable at home, for example by installing recycling. I've also tried in holiday camps, because the kids bring plastic plates and every day thousands of plastic plates go into the rubbish without being recycled."	"I think young people today talk a lot about sustainability but do little about it." "at this moment the youths really talk and have concerns because they are going to be the adults of tomorrow and if this continues to be like this it will be a disgrace. But at the level of behavior, very few young people make sustainable decisions." "Young people talk a lot about sustainability and the impact that certain things have on the environment, they are starting to be aware of this, but as to get there we have to make a big change in our daily habits, young people do not always have this desire, they are not prepared for this. This also requires some reflection and awareness. And young people's lives - and I'm glad that this is the case - are not very serene, everything happens very quickly. Young people have a much faster pace, which sometimes doesn't allow them to gain that awareness that is necessary for a person to change certain habits. And they work very much in tribes and groups. And so, I'm fully aware that it's difficult for a young person to be willing to change their lifestyle, but I think it's a question of time."	"I think we are more or less at the same level as most of the other European countries in terms of awareness. However, in terms of action, maybe less than other countries, especially the United Kingdom, Germany, Holland and other Nordic countries."	
		Communication with consumers	-	-	-	-	-	-	-	-	"I think at this moment, if I've asked me "is it easy to pass on your sustainability message?" I would tell her "it's much easier the more mature the person is, because time also gives us a more serene way of being and we don't live in tribes in the sense that we need to show something new every day". We live much more for our comfort, so at that time we give much more importance to the comfort of the piece, the quality of the fabric, that it lasts. Young people don't understand this question so much and they can buy a super-cheap piece and never ask themselves how much the piece cost, how much the material cost, how much the transport of the material cost, how much someone who made it received for that piece." "And also conveying this idea is not always easy."	"This is the greatest difficulty for us because if we are not aware of everything that intrinsically happens in our chain it will be difficult to do what for us is our second greatest difficulty, which is to pass this message to consumers. This will be our second major difficulty precisely because it is not easy in a clear way and in a way that gives confidence to consumers to pass this message that we are really sustainable and ethical. So it's not easy to reach people with the right message, and since we don't have huge communication budgets like those traditional brands, we can't be as visible." "We do this through advertising on social networks or Google, but the space you have to pass that message is very limited, it has to be really captivating for the person to stay longer to read it, otherwise you only have a very reduced call to attention, and you don't have a giant space where you can explain in a very elaborate and well-constructed and situated way why we are sustainable. And if you do it in the most traditional way, with one or two key ideas, you run the risk of looking like you're just like the others. People might think ah it's just another sustainable message." "we have to try to attract them as much as possible to our website or to our social networks and show them through content that we actually have a lot of quality without people touching our clothes, without people having contact with the product." "And this ends up creating a problem in the communication of sustainability, which is that eventually consumers perceive "ah, this is sustainable, but it's not that sustainable", so it's all the same being sustainable or not. And we, who work from an almost 100% sustainable point of view, because we are not perfect either, or try to really share relevant information, then we have this problem of convincing people that being sustainable is not really that, it's something else."	"I'm happy that there are improvements in the sustainability of these companies, but I makes our job harder when these messages are communicated in the wrong way and for the wrong purpose. And it becomes more

Themes	Categories	First-order codes	Caetana A.	Teresa C.	Frederica V.	Beatriz F.	Margarida B.	Carolina C.	Isabel R.	Company 1- ISTO.	Company 2 - Obi Clothing	Company 3 - Francis Stories	Company 4 - SIZ	
Challenges in the Portuguese sustainable fashion market	Challenges faced by consumers	Difficulty in accessing information	"Besides this, I don't know many brands and I think there should be more information about where to buy and the benefits of sustainable clothing. Currently one must invest a lot of effort and time to find information."	-	"Yes, without a doubt, I think my big problem is that I can't find this information anywhere." "I think I have very little information available about it. It's not easy to access this information." "One of the difficulties I mentioned was the lack of information." "I don't know where to find that kind of information. There's a lot of information online, but I don't know if it's reliable." "I feel that I'm still very misinformed about sustainable clothing, for example I used to think that sustainable materials had worse quality." "I want to do research and even if it's not so easy and accessible."	-	-	"I've never looked for much information, but if I started thinking I wouldn't even know where to look for information."	-	-	-	-	-	
		Location	"No, I don't think that the location of sustainable brands stores is a barrier. More and more, we find sustainable clothing shops around the country, they are present in several cities, so I think that's not a barrier."	"I think that sustainable brands have less visibility because they are not in malls and shopping areas like Chiado."	"Yes, I think the location of the sustainable brand shops is a barrier. I usually go to shopping centers when I go shopping. I don't have much of a habit of going to high street shops." "And one of the reasons why I don't buy so much in sustainable clothing is exactly that, because I didn't even know where the shops were. I don't usually go shopping in those areas."	-	"I think the location of sustainable brands is a barrier to buying. For example, Patagonia doesn't even exist in Portugal, so you need to buy online without trying on the clothes, and I don't know if they are going to fit me or not." "I think the main challenge is that they are not present in the places I go to."	"Firstly, I go to stores in shopping centers a lot. I don't feel like going to a little shop in the middle of nowhere or somewhere I don't go to buy a sustainable brand. I go to areas where all the brands are located ("business districts" or "malls") and I do everything in the same space and if those brands are not there I will hardly know they exist. I don't consider them as an option because they are not even there."	"I don't buy sustainable fashion because I don't see many brands."	-	-	-	-	
		Fabric is not comfortable	"I also think that fabrics are not very comfortable."	-	"The materials are not always better, I speak from experience, I bought some shoes that are sustainable and are very expensive and the material is not good. I feel that the quality of the shoes is not good, it's not very durable, it damages easily, it's not as comfortable as other non-sustainable shoes, and it's quite expensive."	-	-	-	-	-	-	-	-	-
		Lack of style options	"Besides this there isn't many options, I think I would start buying if they introduced, for example, party clothes and more variety."	"I think that there is more and more offer, but it is still not enough style options." "There needs to be more styles on offer. There are already some, but they are few."	"Sustainable fashion is mostly casual clothing. I think there's very little on offer. And the problem is that the supply that there is very basic stuff, and sometimes I think "does it make sense to be spending so much money on something so basic?". Normally they have very basic items of clothing, and I don't feel like spending a lot of money for it being sustainable."	-	"I also feel that there is little on offer, you don't have a jacket that looks fancy and is sustainable. If I wanted to buy sustainable clothes for my job, I wouldn't find them and I'm a lawyer, I can't go to the office styled in Patagonia. That's a giant barrier."	"I think the offer of different styles is enough, there are more and more of them. For example, you already start seeing sustainable sports brands. You can also find sustainable shoes, both casual and for work. And even women's clothes you can also find things to go to work, but of course they are those smaller brands on Instagram. For men, I think it's more difficult to find sustainable clothes for work."	"First of all, one barrier is the lack of options."	-	-	-	-	
		Limited supply	-	-	"Another barrier is the supply of clothing."	-	-	-	-	"there are few sustainable choices; I don't know much of an alternative"	-	-	-	-
		Complex Process	"Currently one must invest a lot of effort and time to find information."	-	"One of the difficulties I mentioned was the lack of information." "I want to do research and even if it's not so easy and accessible."	-	"But clothes, if you don't look at the label, you don't know what they're made of, and I'm not used to looking at the label." "Often I want to buy something more expensive and better, but then I think "this has to be washed by hand, I'm not going to ask my mother to wash it by hand". So I end up not buying it because I'm not up to that job."	-	"An investment in a more sustainable brand or one that isn't fast fashion would have to be a much more considered purchase." "Besides that, I'm not a person who likes to research new trends, I like new trends to come to me through social media. Then I also like to go to the stores and find what I already know is in fashion. I don't have to do any research." "Often I want to buy something more expensive and better, but then I think "this has to be washed by hand, I'm not going to ask my mother to wash it by hand". So I end up not buying it because I'm not up to that job."	-	-	-	-	-

Themes	Categories	First-order codes	Carina A.	Teresa C.	Fredrika V.	Bianca F.	Marysda B.	Carolina C.	Isabel R.	Company 1 - DITO	Company 2 - Old Clothing	Company 3 - Francis Stores	Company 4 - S12
		High Costs	-	-	-	-	-	-	-	-	<p>"The costs are quite high."</p> <p>"You have to bear in mind that the costs are high, but also that the goal is not to produce a lot."</p> <p>"But really the costs of having a sustainable brand are quite high."</p>	<p>"The clothes are made in Portugal, not in Bangladesh, so they cost more."</p>	<p>"The costs are one of the biggest challenges for us."</p> <p>"Fabric is expensive, production is expensive, so we make few pieces, the investment of the website and photographs is expensive."</p> <p>"It's bad in terms of costs because it costs us more to produce smaller quantities."</p>
		High Price	<p>"I also look at the price, it's also an important factor."</p> <p>WI think the price of sustainable fashion is too high, I think that for me to buy the price would have to decrease because not all people can afford those prices."</p> <p>"I know that the quality of sustainable products is higher, but I think that the increase in quality is not proportional to the increase in prices."</p>	<p>"I would love to buy from a sustainable brand, but I don't have the budget for that."</p> <p>"Obviously if an organic cotton t-shirt costs €30 and a normal t-shirt costs €5, I'll choose the €5 one."</p> <p>"The main barrier is the price. Sustainable fashion is very expensive, and I can't afford it."</p> <p>"I don't know if I would be more inclined to buy if they were in shopping malls, because the price is high and I don't have a budget."</p> <p>"I don't know if it's worth buying a more expensive piece of clothing that says it's sustainable, because maybe it's just marketing and there's nothing sustainable about it."</p>	<p>"Prices are usually much higher."</p> <p>"I don't feel like spending a lot of money for a being sustainable."</p> <p>"Because I think the big reason why I sometimes don't buy sustainable clothing is not because it's more expensive, it's because it's more expensive and I don't know if there's really a reason for it or if they're simply making it more expensive to make more profits."</p>	<p>"Of course the price influences and for some it can be a barrier, but I'm willing to pay more for sustainable products."</p> <p>"Everything is very expensive. And I don't know if it's all expensive because you're paying for the brand or because I'm paying for high quality because they use sustainable materials. Because I know that many of them support sustainability, but I don't know what I'm paying."</p> <p>"I find it very interesting to understand why sustainable fashion is more expensive than fast fashion."</p>	<p>"The main reason for buying fast fashion is the fact that I don't have money to choose other options."</p> <p>"When I think of sustainable fashion, I think of expensive clothes, very expensive."</p> <p>"It's worth spending this money?"</p> <p>"I think sustainable fashion is very expensive."</p> <p>"Another barrier is price."</p> <p>"Because to buy sustainable clothes you need to have a certain income level. A person who can't afford to eat is not going to go for sustainable fashion because they can't afford it."</p>	<p>"It's hard for me to give a lot of money for clothes."</p> <p>"Maybe the price is the main barrier for me."</p>	<p>"I know that many people don't buy sustainable products and would like to buy them because they find them expensive. And that's obviously a problem."</p> <p>"I think sustainable fashion is a bit expensive for the young public."</p> <p>"One of the biggest challenges of being a sustainable brand is perhaps the price factor."</p> <p>"But the truth is that German consumers, besides having a higher purchasing power than Portuguese, are also people who are very conscious of the environmental impact they have, and so the purchases they make always have that in mind."</p>	<p>"Sustainable fashion is a bit expensive for the young public."</p> <p>"There in Portugal we have a lower standard of living than the Nordic countries. The disposable income is higher in those countries."</p> <p>"One of the biggest challenges of being a sustainable brand is perhaps the price factor."</p>	<p>"We've heard a lot of people tell us that our prices are expensive."</p> <p>"And in Portugal, unfortunately, salaries don't help people to start investing in sustainable pieces."</p>		
		Consumer Mentality	-	<p>"The problem is that even if they have a design that more people like, people will be able to find something similar in a fast fashion brand at a lower price and therefore they will choose the cheaper price. We need to change the mindset and not fall into the temptation of buying the cheapest."</p>	-	<p>"We have to change the chip."</p>	-	-	-	<p>"This is an issue that, for example, is already beginning to see abroad, a mentality to change especially among the younger generations. But in Portugal people are also starting to understand the impact of fashion on the environment, although I think we are still a little bit undervalued in Portugal (the smaller brands)."</p> <p>"So, it ends up being difficult to compete with an industry that is already very attached to people having many things and wanting to have different clothes all the time and not just focus on 10 or 15 pieces of clothing. People want to have a lot of things."</p> <p>"Because people would rather have 20 pieces of clothing for 50 euros each than have 2 pieces of clothing for 50 euros. I think it's an issue that will continue to happen and that we cannot avoid because it is part of education, and the way we people think."</p> <p>"Variety is a big barrier for young people not buying. People like to have variety of clothes, various pieces. They don't like to wear the same clothes all the time, they like to have many pieces and that can be a challenge for us."</p> <p>"But the truth is that German consumers, besides having a higher purchasing power than Portuguese, are also people who are very conscious of the environmental impact they have, and so the purchases they make always have that in mind."</p>	<p>"I think that changing this industry involves changing people's mentality."</p> <p>"I think that when we are young, we are very bombarded, and we give a lot of importance to consumption. And there's a lot of 'I prefer to have a lot of different things than having little and good things.'"</p> <p>"And so, young people can invest a lot in a good branded shoes, but then they wear a T-shirt for 5 euros and a wide variety of clothes."</p> <p>"Young people don't understand this question so much and they can buy a super cheap piece and never ask themselves how much the piece cost, how much the material cost, how much the transport of the material cost, how much someone who made it received for that piece."</p>	<p>"I think what is missing a lot of times is a change of mentality. Being sustainable and being conscious is first of all consuming less and better. And even if a person doesn't have so much disposable income, they can make the shift from buying 10 pieces of clothing for 20 to 5 pieces for 50 and they will last longer."</p> <p>"It's all about the gratification of consumerism and thinking too much about the short term."</p> <p>"We are all used to marketing messages that promote consuming and having new things to show that we are someone. What really has to change is this mentality, that we have to have new things, which is something that is more intrinsic in our heads and, therefore, is more difficult to change."</p> <p>"There is still the idea that sustainable brands are very extravagant, that they make pieces that are not usable in everyday life, but this is increasingly not the case. More and more there are brands that are sustainable and that act like any other brand in the market, that make designs like other brands."</p>	<p>"Another problem is the mentality of people who don't want to invest in good pieces, they prefer to have more bad quality pieces than few good quality ones."</p> <p>"And on top of that, there are many people who still prefer to have many pieces and buy compulsively. It's a problem of mentality, and you can't buy expensive items compulsively."</p>
	Challenges in the Portuguese sustainable fashion market	Challenge in matching sustainable demand and supply	-	-	-	-	-	-	-	-	-	-	-
		Lack of knowledge from consumers	<p>Got an impressed look on her face. She didn't know about the impact of the fashion industry on the environment."</p> <p>"I thought the impact was quite smaller."</p>	<p>Despite knowing a lot, she was impressed by some of the figures. However the surprise was not as shocking as others."</p>	<p>"Oh my god"</p> <p>She was very surprised. She knew nothing about the impact of the fashion industry on the environment.</p> <p>"It's quite shocking."</p>	<p>She was surprised.</p> <p>"Wow"</p>	<p>"I don't know much..."</p> <p>"I think there is still no thought in people's heads that wearing fast fashion clothes is not sustainable. Clothes are not plastic, and people have plastic in their heads. For them, clothes are not bad for anyone."</p> <p>"I wasn't aware that the fashion industry had such an impact on the environment."</p>	<p>"I'm shocked."</p> <p>"I know very little about the negative impact of the fashion industry in the environment. I know it has some impact obviously, but I have no idea."</p> <p>"Oh my god", "sh..."</p>	<p>"Young people don't understand this question so much and they can buy a super cheap piece and never ask themselves how much the piece cost, how much the material cost, how much the transport of the material cost, how much someone who made it received for that piece."</p>	<p>"These people are not aware or do not have the knowledge, in terms of materials and the quality of production and manufacturing, that certain pieces will last much longer than others."</p>	<p>"People in general hear that fast fashion is bad for the environment. But people still don't really know what's behind it. They think they know because they've heard about it superficially, but they don't really know, at least not as people who are inside the industry."</p> <p>"Maybe they don't understand the concept. I think people have no idea of the impact of fashion on the environment and maybe it doesn't mean anything to them 'sustainable brand', they just think it will be very different or that it is made in a workshop without quality by a person who makes things by hand."</p>		
		Lack of social acceptability	<p>"Also, I wouldn't feel good wearing sustainable clothes, I think I would be teased by my friends."</p>	<p>"I don't think it's very easy to kill if someone is wearing sustainable clothes, unless you have a brand like ecoalf that you would see right away. But I don't think people judge by whether the clothes are sustainable."</p>	-	<p>"Actually, it's funny because I think when I started buying second hand clothes there were lots of people who told me 'that's disgusting, you're wearing clothes that have already been worn by other people!'"</p>	<p>"I think that if I wore the sustainable clothes that are available at the moment, I would be judged, like 'why are you wearing those clothes!'"</p> <p>"I think nowadays, nobody notices if an outfit is sustainable and nobody judges. I think people notice more if it's cute or if it's ugly. I don't think the fact that it's sustainable affects people's opinion."</p>	<p>"In terms of my friends' opinions, I think one or the other would probably make fun of it, if it's a garment that you can clearly see is requested I think it would be commented on. But if it was an ordinary garment I don't think anyone would notice and they wouldn't say anything, it depends on the design of the garment."</p>	-	-	-		
		Quantity vs Quality	-	-	-	-	-	<p>"I mean, I couldn't spend €20 on a jumper, I would have to spend much more and maybe I couldn't buy one a month, but once a year."</p>	<p>"Being cheap you can buy more variety for the same price."</p> <p>"Maybe if with the price of one sustainable item I could buy four non-sustainable ones, I would end up choosing the four non-sustainable ones."</p>	-	-	-	

Themes	Categories	First-order codes	Catiana A.	Teresa C.	Fredrica V.	Beatriz F.	Margarida B.	Carolina C.	Isabel B.	Company 1 - ISPO	Company 2 - OBI Clothing	Company 3 - Francis Stories	Company 4 - SIZ	
		Lack of trust	<p>"When I buy sustainable fashion I look at the label. Because, for example, it's useless for me to be told that it was made with 5% sustainable cotton and the rest with elastane, which is basically plastic. Then it doesn't make sense for me to buy it. 5% is organic cotton, but 95% is plastic. So I'd rather buy a T-shirt that's not sustainable."</p> <p>"I know of several brands that claim to do something that they don't do."</p> <p>"As I said before I will always doubt if they are lying to me."</p>	<p>"For example, now there are lots of water bottles that say 100% recyclable, this is misleading people. 100% recyclable means that we can recycle the bottle, and people think it is made from recyclable materials when it is not! It is important to know the meaning of the name, because lately brands only put these words in their communication to please."</p> <p>"Nowadays you don't really know what is sustainable fashion or not. It seems like they're playing games, everyone wants to be sustainable, and they all have fancy names, but if you look at the root of it, they're not really sustainable. It seems that companies use words like 'sustainable' and 'eco-friendly' just as a marketing strategy. I don't know if it's worth buying a more expensive piece of clothing that says it's sustainable, because maybe it's just marketing and there's nothing sustainable about it."</p> <p>"Because I feel that there are things being told to us that are not true."</p>	<p>"And even when a brand says it's sustainable I don't know how sustainable it is, nor do I know what kind of practices that brand does."</p> <p>"A big barrier for me is making sure it's really sustainable. I never know if it's really sustainable or if it's fake."</p> <p>"When they don't show the reasons, I'm left wondering if it's really sustainable or not."</p> <p>"Also, because when I think about spending more money on a sustainable product, I always wonder if it makes sense to spend that money and if the product is going to be damaged fast"</p>	<p>"Sometimes I have doubts about the credibility of these certificates because there are many that have not been verified. When I think of sustainable fashion, I also think of brands that may convey an image that does not correspond to reality."</p> <p>"The first barrier is the issue I mentioned before of certificates that companies have that don't correspond to what is practiced in reality. I was shocked by the amount of certificates that seem to be credible from the consumer's perspective, but in reality are not. So, for me that's a limitation in the sense that I'm buying it because I think it's sustainable and I'm paying more, but I'm always a bit doubtful about how sustainable it really is."</p>	<p>"I think I would make a difference. For example, there are lots of brands that say they are sustainable, but then they are not."</p> <p>"I think it would make a difference. For example, there are lots of brands that say they are sustainable, but then they are not."</p> <p>"There are many brands that say they have a new sustainable line, but don't explain what makes them sustainable."</p>	<p>"How do I know that's real? How do I know that the labels are well regulated and that the way they made the garment isn't even worse?"</p> <p>"I probably don't risk buying online, I prefer to see in hand and be sure of what I'm buying while if it's Zara, H&M or Stradivarius I buy very quickly online because I know it's what I'm waiting for. I know it is safe. The next I never know what it is and if I should trust, I prefer to see it in hand. But this is because I'm in the beginning and I don't know many brands yet, but maybe when I find a brand that I really like and that I really know and that I'm sure is sustainable, then I'll buy online."</p>	<p>"We are happy that there is a development in the fashion industry. However, I think there's still a lot of things to improve, for example, to make a sustainable line, but to continue producing a lot of pieces, maybe it'll end up not being sustainable anymore. It's no longer enough to produce garments with recycled cotton, we're all going to have to start reducing our consumption."</p>	<p>"We are happy that there is a development in the fashion industry. However, I think there's still a lot of things to improve, for example, to make a sustainable line, but to continue producing a lot of pieces, maybe it'll end up not being sustainable anymore. It's no longer enough to produce garments with recycled cotton, we're all going to have to start reducing our consumption."</p>	<p>"The greatest difficulty in attracting clients has to do with the trust that a brand that does not have a great notoriety has to generate with new audiences. Any of us who see a brand for the first time, if we don't know it, we don't immediately have that trust."</p> <p>"And this ends up creating a problem in the communication of sustainability, which is that eventually consumers perceive 'ah, this is sustainable, but it's not that sustainable', so it's all the same being sustainable or not. And we, who work from an almost 100% sustainable point of view, because we are not perfect either, or try to really share relevant information, then we have this problem of convincing people that being sustainable is not really that, it's something else."</p> <p>"The problem often is that it doesn't seem to me most of the time that they are developing fully sustainable collections. Often the ways in which they convince people that it's sustainable is more by the quality of the production of the campaigns, rather than by the information provided."</p>	<p>"I think that for those who can only buy fast fashion, it's better to go for those sustainable lines than for the normal lines, but I think people should try to understand or someone should explain to them that it's not the same thing as a sustainable brand, because it's just a very small part of a giant brand that is doing a lot of damage and that doesn't make up for what they are doing on the other side. I think it's a bit of greewashing."</p> <p>"And they manage to make sustainable lines at cheap prices anyway, and they are made with sustainable fabrics, but they are made in the same way as the rest of the lines, which is still fast fashion. They're not 100% sustainable, they say they're using organic cotton, but nobody knows where the organic cotton comes from and who it's made by and how much people are paid to make these garments."</p>		
		Demand for newness	<p>"About once a month I buy clothes. There are times where I buy 5 or 7 items of clothing and others where I buy only 1, but on average 3 or 4 items of clothing per purchase."</p> <p>"The main reasons for buying new clothes are the change of season; wanting to be fashionable; having changed my style a little, or simply because I feel like going shopping and I see something I like and buy it."</p> <p>"Most of my purchases are impulse purchases."</p>	<p>"I don't know, maybe once a month I buy clothes. On average 1 garment a month"</p> <p>"The main reasons for buying new clothes it's because there's a new trend that I like and so I buy new clothes to have something that is in line with that new trend, either in shape or pattern or colour."</p>	<p>"I would say on average I buy two or three pieces of clothing."</p> <p>"I'm a bit of a shopaholic. I think it's because I like to keep up with the trends. I get tired of my clothes easily, which is something I'm trying to change. And I think the fact that follow influencers who are constantly posting new clothes, makes me want more. That encourages me to buy more fast fashion. My purchases are mostly impulse purchases. Because I don't think I need anything right now, I already have everything."</p>	<p>"Per month I would say I buy more or less 1 item of clothing."</p> <p>"I think that no matter how many clothes I have I always feel that there are days when I'm saturated and end up thinking 'ok, I could use a new piece of clothing' so I feel cuter and I end up buying something."</p> <p>"I'm a person who gets tired easily, so I'd rather spend €30 than €100 because I know I might get sick of them."</p>	<p>"I would say I buy one piece of clothing each month."</p> <p>"I try not to buy too much, but I would say more than once a month. And about 2 pieces of clothing each time I buy."</p> <p>"When I feel down I go shopping. When I'm tired I go shopping. When I have nothing to do I go shopping. I have a problem. Those days when I have nothing to do and I feel like leaving the house these are the days when I'm most likely to spend money. My shopping is almost always on impulse, unless it's something I really need, then I think about it more."</p> <p>"I'm obviously a girl who likes to have new clothes every year."</p>	<p>"I also go shopping for pleasure. Sometimes I feel like having something different and go shopping. Or if it's for a special occasion."</p> <p>"And then after a while I end up getting sick of the clothes. I tend to get more or less tired of clothes"</p>	<p>"So, it ends up being difficult to compete with an industry that is already very attached to people having many things and wanting to have different clothes all the time and not just focus on 10 or 15 pieces of clothing. People want to have a lot of things."</p> <p>"Variety is a big barrier for young people not buying. People like to have variety of clothes, various pieces. They don't like to wear the same clothes all the time, they want to have many pieces and that can be a challenge for us."</p>	<p>"I think that when we are young, we are very bombarded, and we give a lot of importance to consumption. And there's a lot of 'I prefer to have a lot of different things than having little and good things'."</p> <p>"And so, young people can invest a lot in a good, branded shoe, but then they want a T-shirt for 5 euros and a wide variety of clothes."</p>	<p>"We are all used to marketing messages that promote consuming and having new things to show that we are someone."</p>			
		Challenges in the Portuguese sustainable fashion market	<p>"Brands should invest more in design to make products more attractive. This is very important to me. I buy clothes if I like them aesthetically and if they suit me. Currently I think that sustainable clothes are not cute."</p>	<p>Design is also a barrier. Usually sustainable fashion is ugly. The supply of sustainable fashion is very hipster. It's all very ugly. I think that sustainable fashion is not yet included in society as normal, it seems that it's still a bit hippy."</p> <p>"The problem is that nowadays in sustainable companies, the very people who design the clothes are hippies, so they will make pieces for that style."</p>										
		Unfashionable clothing												
		Competition (Fast Fashion)	<p>"I buy from fast fashion brands because the quality is usually good. Not excellent, but good. And the price-quality ratio is the best."</p> <p>"I buy fast fashion brands, mainly because the prices are low. Besides, they have a wide variety of clothes so I'm almost sure I'll find something I like. And also, because they have stores everywhere, they are well located and it's easy both to buy and to return items."</p>	<p>"It has a good quality for the relationship it has with the price."</p> <p>"Obviously if an organic cotton t-shirt costs €30 and a normal t-shirt costs €5, I'll choose the €5 one."</p> <p>"Some fast fashion companies, like Zara and H&M, are already starting to make some sustainable stuff and they have a reasonable average price, it's more accessible to everyone. But I think it will be difficult for fast fashion companies to start producing only sustainable fashion, as it goes against their business model and their items will become more expensive."</p> <p>"And the problem is that even if they have a design that more people like, people will be able to find something similar in a fast fashion brand at a lower price and therefore they will choose the cheaper price."</p>	<p>"I would say that buying fast fashion has a bit to do with the fact that clothes are always in fashion."</p> <p>"And then the price is undoubtedly something that influences a lot in buying fast fashion."</p> <p>"I don't think they have much quality, but I end up buying them because the prices are lower and they're always in fashion."</p> <p>"When I go to Zara what motivates me is the price. I go there and think 'this is really cheap, I'll buy it'."</p>	<p>"I buy fast fashion because for example if I compare jeans from Zara or Mango with jeans from Levis, they last the same amount of time. The denim doesn't have any difference. And I know I'm a person who gets tired easily, so I'd rather spend €30 than €100 because I know I might get sick of them. I buy fast fashion because the clothes are cheap and there is a good quality-price ratio."</p>	<p>"I'm obviously a girl who likes to have new clothes every year."</p> <p>"My main reason to buy fast fashion is the fact that I don't have money to choose other options. Besides that, I'm not a person who likes to research trends, I like new trends to come to me through social media. Then I also like to go to the stores and find what I already know is in fashion. I don't have to do any research."</p> <p>"I don't think I have the money to make those decisions yet, so I always end up choosing the quickest and cheapest."</p>	<p>"I go to chinos de alvalade a lot, it's great and has a huge offer."</p> <p>"I buy fast fashion because it's cheap, and being cheap you can buy more variety for the same price. I bought a more expensive brand. I could only buy 1 piece for the same price as I buy 5 in fast fashion. And then after a while I end up getting sick of the clothes. I tend to get more or less tired of clothes."</p>	<p>"Maybe I've seen some sustainable brands, but I didn't find it appealing."</p> <p>"Sometimes, there are sustainable things that have that recycled look that isn't very cute. The design is not very appealing."</p> <p>"Ok, good, they are doing sustainable things, but don't forget that we want nice clothes before we want sustainable ones."</p>	<p>"Except maybe those that belong to the fast fashion circuit that say they are sustainable, but because they manufacture far away, right there the ecological footprint is brutal. It is not sustainable. That is a fallacy. And if they produce on masse, and 20% of the production is to be incinerated, then they are not sustainable at all."</p> <p>"We are happy that there is a development in the fashion industry. However, I think there's still a lot of things to improve, for example, to make a sustainable line, but to continue producing a lot of pieces, maybe it'll end up not being sustainable anymore. It's no longer enough to produce garments with recycled cotton, we're all going to have to start reducing our consumption."</p> <p>"when they talk about sustainability and continue to mass produce, it's a bit misleading."</p>	<p>"The problem often is that it doesn't seem to me most of the time that they are developing fully sustainable collections. Often the ways in which they convince people that it's sustainable is more by the quality of the production of the campaigns, rather than by the information provided."</p> <p>"And I think that the power they have to communicate into that part of the message that they want, and to be very flashy about it, ends up obscuring all the non-sustainable issues that they have. And this ends up creating a problem in the communication of sustainability, which is that eventually consumers perceive 'ah, this is sustainable, but it's not that sustainable', so it's all the same being sustainable or not. And we, who work from an almost 100% sustainable point of view, because we are not perfect either, or try to really share relevant information, then we have this problem of convincing people that being sustainable is not really that, it's something else."</p> <p>"One of the biggest challenges of being a sustainable brand is perhaps the price factor. The costs are quite high. And therefore, the final product is a product that cannot compete with other brands."</p> <p>"We are all used to marketing messages that promote consuming and having new things to show that we are someone. The fast fashion brands continue to create a lot of marketing to sell and change the pieces, and it is difficult to combat this."</p>	<p>"We don't consider fast fashion as competitors, we see them as a threat, but not as competitors."</p> <p>"And for us it's unfair, because they have all the means to make these sustainable lines and they get those means from fast fashion to make a little bit good, and we have almost no means to do what we're doing. And they manage to make sustainable lines at cheap prices anyway, and they are made with sustainable fabrics, but they are made in the same way as the rest of the lines, which is still fast fashion. They're not 100% sustainable, they say they're using organic cotton, but nobody knows where the organic cotton comes from and who it's made by and how much people are paid to make these garments."</p> <p>"We see these sustainable lines as a bit of a risk."</p> <p>"It's annoying for us because we feel unfair because people think it's good and they keep looking away from our brand."</p>		

