

Marketing Strategy for Eco-apparel

Saugat Neupane

**Submitted to the Faculty of Business, Education, Law and Arts of the
University of Southern Queensland in partial fulfillment of the
requirements for the degree of Master of Business Research**


02 December 2015

Abstract

The purpose of this research is to identify the marketing barriers of eco-apparel products and to develop a marketing strategy framework that can be employed by eco-apparel companies in the process of devising marketing tactics to overcome the marketing barriers. The overall research design is qualitative, using both thematic as well as content analysis methods for data analysis. The data were collected through 24 qualitative interviews and 12 technical reports on eco-apparel and conventional apparel. The research found that dull and monotonous products, improper labelling with substandard certification, unsuitable fitting, unfashionable and unstylish products, lack of warranties, exclusive distribution, healthiness and environmental friendliness, fair wages, disposal and recyclability, low branding, consumer ignorance, and premium pricing are marketing barriers to eco-apparel acquisition. The findings suggest that eco-apparel companies need to eliminate improper labelling that uses substandard certification and to eliminate exclusive distribution. They also need to raise intensity of distribution, widen the range of products; raise consumers' awareness of the value of fair wages and of the value of disposability, recyclability, healthiness and environmental friendliness; promote durability, and comfort of fabric, reduce the price of their products; and reduce consumer ignorance about eco-apparel products. The companies should add warranties to their products and create more colour, suitable fitting, fashionable and stylish products, as well as make use of branding. The theoretical contribution of this research is the development of a marketing strategy framework for eco-apparel using the Strategy Canvas and Four Actions Framework (Kim & Mauborgne 2015). Marketing practitioners can use the outcomes of this research as basic premises for the design of their marketing tactics. The limitation of this research is that all research interview participants were from one country, Australia. In future, the scope of this research can be expanded to international markets.

Certification of thesis

I certify that the ideas, experimental work, results, analyses, software and conclusions reported in this thesis are entirely my own effort, except where otherwise acknowledged. I also certify that the work is original and has not been previously submitted for any other award, except where otherwise acknowledged.

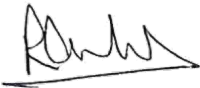


Mr Saugat Neupane
Signature of Student

02/12/2015

Date

ENDORSEMENT



Dr Ranga Chimhundu

02/12/2015



Dr Eric Kong
Signature of Supervisor/s

02/12/2015

Date

Acknowledgements

First and foremost, I wish to thank my thesis supervisors, Dr Ranga Chimhundu (Principal Supervisor) and Dr Eric Kong (Associate Supervisor) for their support throughout my research. I would like to thank them for their patience and the valuable guidance and feedback they have given me. In addition, they motivated me to attend relevant training sessions and workshops such as Endnote and NVivo, which proved to be very useful to my research project. Further, I would like to express my gratitude to my course-work course examiners, Professor Aileen Cater-Steel, Professor Ronel Erwee, Associate Professor Jianming Yong and Dr Wui-Gee Tan, who helped me to complete courses related to my research master's degree. I am also thankful to Miss Lesley Astbury, Mrs Kathryn Schmacker from BELA administration, USQ, who helped me with most of the administrative processes related to my research study. Many thanks to Miss Bethany Rognoni and Mrs Diane Josey for their assistance in proof reading my thesis.

It would not have been possible for me to embark on and complete this research without financial support. I would like to express my sincere gratitude to my father-in-law, Mr. Liladhar Padhaya, for supporting me financially. I would like to acknowledge my wife, Mrs Nisha Sharma, for all her emotional support. I would also like to thank my parents, Dr Khem Raj Neupane and Mrs Saraswati Neupane for their prayers and blessings. I am also indebted to Mrs Kym Davis, my colleague and an officer at USQ, who deserves credit for giving me moral support.

Table of Contents

| | |
|---|-----|
| Abstract..... | ii |
| Certification of thesis..... | iii |
| Acknowledgements..... | iv |
| List of publications..... | ix |
| List of tables..... | x |
| List of figures..... | xi |
| Appendices..... | xii |
| Chapter 1: Introduction..... | 1 |
| 1.1 Background to the research..... | 1 |
| 1.2 Research problem and research questions..... | 1 |
| 1.2.1 General focus research question..... | 2 |
| 1.3.2 Sub research questions..... | 2 |
| 1.3 Justification for the research..... | 2 |
| 1.3.1 Theoretical contribution..... | 3 |
| 1.3.2 Practical contribution..... | 4 |
| 1.4 Methodology..... | 4 |
| 1.5 Outline of this thesis..... | 5 |
| 1.6 Definitions..... | 6 |
| 1.6.1 Eco-apparel..... | 6 |
| 1.6.2 Key factors of competition..... | 7 |
| 1.6.3 Marketing barriers..... | 7 |
| 1.6.4 Marketing strategy..... | 7 |
| 1.7 Delimitations of scope and key assumptions..... | 7 |
| 1.8 Conclusion..... | 8 |
| Chapter 2: Literature review..... | 9 |
| 2.1 Introduction..... | 9 |
| 2.2 Market analysis of eco-apparel..... | 9 |
| 2.2.1 Eco- products..... | 10 |
| 2.2.2 Eco-apparel products..... | 13 |
| 2.2.3 Consumers of eco-apparel..... | 16 |

| | |
|--|----|
| 2.2.4 Marketing barriers of eco-apparel..... | 20 |
| 2.2.5 Key factors of competition in the apparel industry | 24 |
| 2.2.6 Marketing approaches for eco-apparel | 26 |
| 2.3 Marketing strategy..... | 27 |
| 2.3.1 Competitive marketing strategy | 30 |
| 2.3.2 Strategy Canvas and Four Actions framework..... | 31 |
| 2.3.3 Marketing mix | 34 |
| 2.4 Research problem | 36 |
| 2.4.3 Research questions | 40 |
| 2.4.4 Conceptual model | 41 |
| 2.5 Conclusion..... | 43 |
| Chapter 3: Methodology..... | 44 |
| 3.1 Introduction | 44 |
| 3.2 Justification of research paradigm..... | 44 |
| 3.2.1 Constructivist/interpretive..... | 44 |
| 3.2.2 Qualitative vs. quantitative | 46 |
| 3.3 Secondary data collection..... | 49 |
| 3.3.1 Technical Reports..... | 49 |
| 3.4 Primary data collection | 51 |
| 3.4.1 In-depth interview | 52 |
| 3.4.1.2 Interview setting and participants | 54 |
| 3.4.2 Pilot interviews | 56 |
| 3.5 Data processing and analysis | 56 |
| 3.5.1 Data transcription | 57 |
| 3.5.2 Data analysis | 58 |
| 3.6 Validity | 60 |
| 3.7 Ethical considerations | 62 |
| 3.7.1 Research merit and integrity | 62 |
| 3.7.2 Informed consent..... | 62 |
| 3.7.3 Harm..... | 63 |
| 3.7.4 Privacy and confidentiality..... | 64 |
| 3.8 Conclusion..... | 64 |
| Chapter 4: Findings and analysis..... | 66 |
| 4.1 Introduction | 66 |

| | |
|---|-----|
| 4.2 Key factors of competition in the apparel industry | 66 |
| 4.2.1 Colour..... | 68 |
| 4.2.2 Comfort | 70 |
| 4.2.3 Augmented features | 72 |
| 4.2.4 Place and Distribution..... | 74 |
| 4.2.5 Branding..... | 77 |
| 4.2.6 Durability..... | 79 |
| 4.2.7 Fair wage | 81 |
| 4.2.8 Fabric..... | 82 |
| 4.2.9 Fashion and style..... | 84 |
| 4.2.10 Health and environment friendliness | 86 |
| 4.2.11 Label with certification | 89 |
| 4.2.12 Pricing..... | 95 |
| 4.2.13 Range | 97 |
| 4.2.14 Disposal and Recyclability | 99 |
| 4.2.15 Fitting | 100 |
| 4.2.16 Consumer awareness..... | 102 |
| 4.3 Performance of eco-apparel across key factors of competition..... | 105 |
| 4.4 Marketing barriers of eco-apparel..... | 109 |
| 4.5 Marketing Framework | 112 |
| 4.4.1 Eliminate | 116 |
| 4.4.2 Reduce..... | 117 |
| 4.4.3 Create..... | 118 |
| 4.4.4 Raise..... | 119 |
| 4.5 Conclusion..... | 120 |
| Chapter 5: Conclusions and implications..... | 122 |
| 5.1 Introduction | 122 |
| 5.2 Conclusion about research questions..... | 123 |
| 5.2.1 Conclusion about RQ1..... | 123 |
| 5.2.2 Conclusion about RQ2..... | 124 |
| 5.2.3 Conclusion about RQ3..... | 125 |
| 5.2.4 Conclusion about RQ4..... | 130 |
| 5.3 Implications for theory..... | 132 |
| 5.4 Implications for apparel industry managers..... | 133 |

| | |
|---|-----|
| 5.5 Limitations..... | 134 |
| 5.6 Directions for future research..... | 134 |
| References | 136 |
| Appendices..... | 152 |

List of publications

The following peer-reviewed conference contribution that was presented recently is based on the research contained in this thesis:

- Neupane, S, Chimhundu, R & Kong, E 2015, 'Eco-apparel marketing strategy: An innovative approach to overcome marketing barriers', paper presented to the AIB-ANZ Annual Symposium, Queensland University of Technology (QUT) Business School, Gardens Point Campus, Brisbane.

List of tables

| | |
|--|-----|
| Table 1: List of negative environmental impacts of clothing industry..... | 3 |
| Table 2: Eco-apparel products' characteristics | 15 |
| Table 3: Customer segments for clothing with eco-labels in India..... | 18 |
| Table 4: The green consumer segments investigated | 18 |
| Table 5: Segmentation of green consumers | 19 |
| Table 6: Competitor analysis factors | 24 |
| Table 7: Summary of key literature | 37 |
| Table 8: Sub-research questions within theoretical framework | 41 |
| Table 9: Labels associated with different research paradigms..... | 45 |
| Table 10: Paradigms, methods and tools..... | 46 |
| Table 11: Technical reports studied in this research | 50 |
| Table 12: Key factors of competition in the apparel industry | 68 |
| Table 13: Comparison of importance of key factors of competition and offering of eco-apparel across those key factors | 105 |
| Table 14: Differences between mainstream apparel consumers' requirements and eco-apparel's offering across key factors | 107 |
| Table 15: Barriers and strength of eco-apparel | 110 |
| Table 16: Classification of barriers under the 4Ps | 111 |
| Table 17: Underlying reasons for marketing barriers and solutions to barriers | 112 |
| Table 18: Eliminate-Reduce-Raise-Create Grid..... | 116 |
| Table 19: Discussion of marketing barriers in reference to previous literature..... | 125 |
| Table 20: Findings and discussion of marketing framework | 130 |

List of figures

| | |
|---|-----|
| Figure 1: Product life cycle stages..... | 11 |
| Figure 2: Classification of eco-products..... | 12 |
| Figure 3: Framework of strategic marketing..... | 29 |
| Figure 4: Strategy Canvas Example..... | 32 |
| Figure 5: Four Actions Framework..... | 34 |
| Figure 6: Variables of marketing mix..... | 35 |
| Figure 7: Conceptual model developed for this thesis..... | 42 |
| Figure 8: Snapshot of nodes (a)..... | 59 |
| Figure 9: Snapshot of nodes (b)..... | 60 |
| Figure 10: Strategy Canvas comparing the importance of key factors of competition and performance of eco-apparel across those key factors. | 107 |

Appendices

| | |
|--|-----|
| Appendix A: Consent form for consumer interviews..... | 152 |
| Appendix B: Consent form for manager interviews | 153 |
| Appendix C: Information sheet for consumer interviews..... | 154 |
| Appendix D: Information sheet for manager interviews | 157 |
| Appendix E: Interview guide for consumers | 160 |
| Appendix F: Interview guide for managers..... | 162 |
| Appendix G: Ethics approval letter | 164 |

Chapter 1: Introduction

1.1 Background to the research

There is a rising concern amongst the population regarding the effect of different industries on the environment (Clarke & Clegg 2000). One such industry is the clothing industry. The clothing industry uses environmentally toxic chemicals regularly for common processes such as dyeing, printing and other garment treatments (Allwood et al. 2006). Animals are killed for fur, leather, bones, shell, and ivory (Stork & Obsever 2012). As more and more people are becoming aware of these atrocities, society and industries together are slowly becoming more inclined towards purchasing eco-apparel in order to minimise the negative effects that the production of normal apparel has on the environment. The terms 'environmentally friendly apparel' and "eco-apparel" are interchangeable. Eco-apparel is designed, produced and distributed through green and organic methods that have minimal effect on the ecosystem of our natural environment (Klonsky & Tourte 1998). Eco-apparel is still in its infancy, and to make it a major choice in the market we need to gain a better knowledge of the market in which we wish to popularise these products. A comprehensive study of segmentation, marketing barriers, competition and marketing strategy, as they relate to eco-apparel products, would provide the necessary insights that could be capitalised on in order to drive eco-apparel products to greater heights. It would ultimately help to increase the demand for eco-apparel, which would reduce harm to the environment, including animals and humans, from the negative impacts of non-eco-apparel products.

1.2 Research problem and research questions

Despite the concern of consumers about the environment and the efforts of companies to make their operations environmentally friendly, eco-apparel is still not the choice of the majority of consumers (Beard 2008). A larger segment of consumers still tend to buy non eco-apparel over eco-apparel. This indicates that there could be several marketing barriers working against eco-apparel, obstructing

its growth. This thesis aims to investigate how the marketing challenges facing eco-apparel could be overcome to make it the preferred choice of the majority of consumers.

1.2.1 General focus research question

On the basis of gaps in current understanding of eco-apparel, the research question developed for this study is, 'How could the marketing barriers of eco-apparel be overcome to make eco-apparel the preferred choice for the majority of consumers?'

1.3.2 Sub research questions

The sub questions for this research are:

1. What are the key factors of competition in the apparel industry?
2. How does eco-apparel perform across the key factors of competition in the apparel industry?
3. What are the marketing barriers to eco-apparel and how can they be classified?
4. What marketing framework could be developed to overcome the marketing barriers faced by eco-apparel?

1.3 Justification for the research

The apparel industry is one of the biggest industries in the world. The total value of the garment, footwear, and luxury goods industry was USD 2,560 trillion in 2010 (Melissa 2012). Around 75 million people are employed globally in this industry (Fashion United). Nearly 75% of the employees are female (Mather 2004). However, the production and use of clothing products is causing a huge negative impact on our environment. The industry uses large amounts of toxic chemicals, energy and water resources. Out of the total global use of insecticides, cotton alone uses 22.5 percent. Table 1 gives a list of the negative impacts of the clothing industry on our environment.

Table 1: List of negative environmental impacts of clothing industry

| S.N. | List of negative impacts of clothing industry |
|------|--|
| 1. | Textile waste occupies nearly five percent of all landfill space. |
| 2. | One million tons of textiles will end up in landfill every year. |
| 3. | Twenty percent of industrial fresh water pollution comes from textile treatment and dyeing. |
| 4. | In 2009, the world used three trillion gallons of fresh water to produce 60 billion kilograms of fabric. |
| 5. | It takes 700 gallons of fresh water to make one cotton T-shirt. |
| 6. | One trillion kilowatt hours are used every year by the global textile industry, which equates to ten percent of global carbon impact |

Source: Adapted from Textile Exchange (2010)

It has become necessary to reduce the use of conventional apparel and increase the use of eco-apparel, which is produced using natural fibres, less water, fewer chemicals and less energy than conventional apparel. The global retail sales of organic cotton apparel, as well as of home and personal care products grew by 20 percent from 2009 to 2010. The total sales in 2010 were over \$5.16 billion (Textile Exchange 2010). There are several barriers that need to be overcome to increase the eco-apparel market. The marketing strategy framework developed by this research may be helpful for producers in their efforts to overcome the marketing barriers and increase the market of eco-apparel products, which will reduce the use of conventional apparel to some extent.

1.3.1 Theoretical contribution

The research will contribute to the currently existing literature relating to eco-apparel within marketing perspectives. The study will establish eco-apparel marketing barriers and the key competing factors between apparel products and contribute to the discipline of Marketing Strategy. Further, this thesis will use the Strategy Canvas and the Four Actions Framework (Kim & Mauborgne 2002; Kim & Mauborgne 2015) to compare eco-apparel with its competition, and design a new marketing strategy framework based on this knowledge. The use of the Strategy

Canvas and Four Actions Framework as tools of strategic analysis is a novel approach that has not been applied to eco-apparel.

1.3.2 Practical contribution

The eco-apparel marketing strategy framework, which is the major theoretical contribution of this thesis, has several practical implications. The knowledge of marketing barriers and the key factors of competition will help eco-apparel managers in further analysis of the challenges faced by their products. The managers can use the marketing framework designed by this thesis as a guideline to design specific marketing tactics. The successful implementation of this marketing framework might help increase the market for eco-apparel. The increase in the demand and consumption of eco-apparel may eventually reduce use of conventional clothing, and hence will decrease the negative effect of apparel industries' activities on our natural environment.

1.4 Methodology

Understanding a complex phenomenon requires consideration of multiple situations and cases experienced by participants (Neuman 2003). This thesis involves the establishment and explanation of causal relationships between different marketing events and eco-apparel consumer interactions. Interpretive study provides a picture of events and processes as they naturally occur and further study explains why and how the events occur. There are both 'what' and 'how' types of research questions in this thesis. A qualitative research method will therefore help to address the research questions in this study. Data collection and analysis usually proceed simultaneously during qualitative research (Yin 2003). Three processes of coding, collection and analysis of data will be continuously used throughout the study.

1.5 Outline of this thesis

The overall thesis outline is based on the thesis structure suggested by Perry (1998b). There are five chapters in this thesis.

Chapter 1: Introduction

Chapter one describes the research background. It outlines the broad field of the apparel and eco-apparel industry and slowly narrows down to the existing problems and establishes the problem statement for this research. The main research question and sub research questions are clearly stated in Chapter one. This chapter provides a brief summary of the research gap, research methods and contributions of this research.

Chapter 2: Literature review

This chapter provides a review of relevant literature and identifies the research issues. The chapter starts with a broad review of the literature on the market analysis of eco-apparel. Different literature on eco-apparel products was searched and reviewed in this chapter. First, the literature relevant to market analysis of eco-apparel was reviewed. Under this category, literature related to eco-apparel, eco-apparel consumers, marketing barriers to eco-apparel, key factors of competition in the apparel industry and marketing approaches in the eco-apparel industry were reviewed. This chapter also reviews the parent theory of marketing strategy. Finally, the research issues are identified within this chapter. Ultimately, a research conceptual model is designed in this chapter.

Chapter 3: Research methodology

This chapter provides details about the methodology used to collect and analyse the research data. It describes the research paradigm, data collection methods, and methods of analysis. To be more precise, this chapter explains what kind of data were collected, how they were collected and how they were analysed. The ethical considerations of this research are also presented in this section. Details about the process of data collection, analysis and results are mentioned in this chapter.

Chapter 4: Findings and analysis

This chapter presents the data analysis and the results synthesized from that analysis. It presents data analysis and results based on each research question. Different tables and figures are used to clearly demonstrate the analysis and results.

Chapter 5: Conclusions and implications

This section discusses the findings of this research and provides details about how these findings contribute to the theory and practice of marketing eco-apparel. The findings under each research question are discussed to ascertain whether these results are in agreement or disagreement with the literature. Further, the section also describes how the findings that are not in agreement with previous literature are beneficial. It explains both the theoretical contribution and the practical contribution of those findings. Also, the limitations of this research and directions for future research are briefly given within this chapter.

1.6 Definitions

The definition section defines key and controversial terminologies used throughout this research. The controversial terms can make it difficult to understand clearly and thus this section will clarify those terms (Perry 1995). Further these terms will be reviewed and critically discussed in the literature review chapter. The key terms used in this research are:

1.6.1 Eco-apparel

There is no standard definition for eco-apparel. Some researchers describe eco-apparel as that which is designed, produced and distributed by organic methods (Klonsky & Tourte 1998a). Some researchers have used the term 'green apparel' (Vardas 2010), while some say that such apparel is socially responsible/ ethical apparel (Dickson 2000). Recycled clothing items are also termed eco-apparel (Intel 2009). In general, the term 'eco-apparel' is apparel, the making and disposal of which, has little negative effect on our eco-system or natural environment.

1.6.2 Key factors of competition

There is no standard definition of 'key factors of competition'. This research has adopted this terminology from Kim and Mauborgne (2002). The factors of competition are 'the factors the industry currently competes on in products, service, and delivery' (Kim & Mauborgne 2005a, p. 110).

1.6.3 Marketing barriers

'Marketing barriers' in this thesis is taken to mean barriers that prevent eco-apparel from entering and/or doing well in the mainstream market. The marketing barriers are different factors that restrict the ability of eco-apparel companies to increase their share of the apparel market. Some of these barriers could arise from competition, need for product differentiation, and economies of scale, cost disadvantages, access to distribution or government policies (Porter 1979).

1.6.4 Marketing strategy

There are different definitions of 'marketing strategy'. However, Kotler & Keller (2009) defined marketing strategy as an overall direction and goals for marketing. The term explains exactly how a company is going to deliver its products to customers. Thus, the same definition of 'marketing strategy' is used for the purposes of this research.

1.7 Delimitations of scope and key assumptions

The marketing strategy framework developed by this study is applicable to eco-apparel producing companies. The eco-apparel could be any apparel that is friendly to the environment in one or another. The framework only gives a general guideline and does not propose any specific marketing tactic. However, it can act as a baseline for eco-apparel managers to further think of how to design marketing activities specific to their product, company and location. The interview participants were the apparel managers and apparel consumers from within the Brisbane region. The managers were from both eco-apparel and conventional apparel companies. The eco-apparel managers used were chosen on the basis of the researcher's own judgement. The companies were chosen irrespective of their

capital size and market and they were not limited to operating within Brisbane. However, all the companies were from within Australia. Eco-apparel managers from companies outside Australia were not included in this study. Apparel consumers were selected purposively. They were chosen irrespective of their demography even though geographically, they were all from Brisbane. Consumers from outside Brisbane were not included. The assumption made in this research was that the apparel consumers in Brisbane have some knowledge and experiences of eco-apparel and are able to share that information. The overall research was driven by qualitative methodology and the data collected from in-depth interviews and technical reports. No other forms of data collection were used. A data triangulation strategy was used to increase the credibility of this research and its findings.

1.8 Conclusion

This chapter briefly described the background of this research and established critical grounds for doing this research. It further stated the research problem and research questions. The methodologies adopted for this research were briefly captured. Also, this chapter gave an outline of this thesis followed by the definitions of key terms used in this research. The following chapters will give details of the literature review and research methods applied in this research, as well as an analysis of data collected for this research, research findings, conclusions and implications.

Chapter 2: Literature review

2.1 Introduction

This chapter will review existing literature relevant to the marketing of eco-apparel and will establish research gaps that lead to research questions which are worth answering through this research. The major discipline underpinning this research is strategic marketing. The process of strategic marketing starts with an analysis of the current market and consumers, followed by decisions on marketing strategy. Thus, the literature review chapter has four sections, two of which deal with major domains relevant to strategic marketing in association with eco-apparel: 2.2) Market analysis of eco-apparel and 2.3) Marketing strategy. These two sections identify the gaps in the previous literature and point to where contribution can be made. Section 2.2 is further divided into six sections. Section 2.2 starts with a description of eco-products (Sub-section 2.2.1) narrowing down to a description of eco-apparel (Sub-section 2.2.2) followed by an analysis of different consumer segments (Sub-section 2.2.3), marketing barriers (Sub-section 2.2.4), and key factors of competition in the apparel industry (2.2.5). The sub-section 2.2.6 critically analyses the existing marketing approaches, either in theory or in practice, designed for eco-apparel. This sub-section will further build a coherence between Section 2.2) Market analysis of eco-apparel and Section 2.3) Marketing strategy. The later part of Section 2.3 reviews different marketing strategy theories and establishes the theories underpinning this research. Section 2.4, Research problem, describes the gaps in the literature. Moreover, this section develops a conceptual model and states the research questions of this study.

2.2 Market analysis of eco-apparel

The goal of a marketing strategy is to improve performance of a product, company or an industry (West, Ford & Ibrahim 2015). A rational marketing strategy can only be achieved through a thorough analysis of different components that affect the market of a product or a company (Kotler & Armstrong 2012). Such components are product features and benefits, segment of consumers, different marketing barriers,

competition and key factors of competition (Wysocki & Wirth 2001). The following sections will provide a detailed review of those components.

2.2.1 Eco- products

The word 'eco' comes from the term 'ecology', the study of all the living and non-living things in the environment and the natural processes related to them (Odum & Barrett 2005). Human, economic and industrial activities are affecting our natural environment (Tukker & Jansen 2006). Industrial processes demand large quantities of natural resources to manufacture products of different kinds, like food, clothing, and electronics (Moll & Acosta 2006). With the demand for products increasing in line with our ever-growing global population, industries are expanding rapidly, and because of this are using more resources and producing more waste than ever before. This has led to greater damage to our environment (Foley et al. 2005). The quality of water, air and land is degrading due to the excessive use and disposal of chemical and toxic substances by industries. Life has become difficult in several parts of the world because of a lack of clean water to drink and air to breathe, and as a result, continuous efforts are being made to start protecting our environment. It has become common practice among many organisations to reduce contamination of the environment (Clarke & Clegg 2000). Even consumers are aware of the fact that industrial products, processes and wastes are harming the ecosystem and this must be managed appropriately. The population of consumers looking for products that comply with high health and environmental safety standards is increasing. Across the world, a growing segment of consumers is seeking ethical and environmentally friendly products that range from organically grown foods to hairsprays, paper, and in more recent times, clothing (Phau & Ong 2007).

A lot of research and development goes into improvising and strategising the production and operation process of industries to make products more environmentally friendly while maintaining efficiency (Sena-Martins, Almeida-Vara & Duarte 2008). 'Organic products', 'green products' and 'sustainable products' are some of the general classification terms of environmentally friendly products.

Global warming prevention, air, water, and soil pollution prevention, chemical substance reduction, waste reduction, resource saving and biodiversity conservation are just some of the major issues that eco-products intend to address. Eco-products address the above issues through enhanced recyclability, reusability, refillability, long life designs, degradability or decomposability, high quality, energy efficiency, use of less hazardous chemicals and also use of recycled materials (Asian Productivity Organisation 2012).

The concept behind eco-products is to use eco-design and environmentally conscious standards to add environmentally friendly features to a product. The development of such products is driven by Life-cycle concepts and engineering (Kobayashi 2005). The development of an eco-product starts with the assessment of the life cycle of the product or service to be provided (as shown in Figure 1), from its conception to the end of its life, and is followed by the determination of optimal sustainable methods of developing that product (Maxwell & van der Vorst 2003).

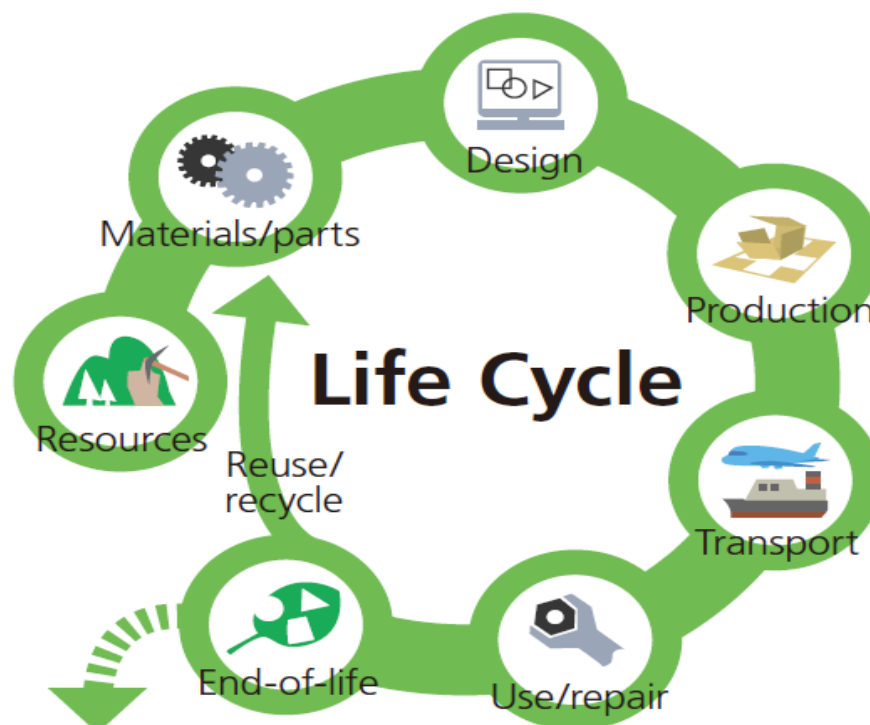


Figure 1: Product life cycle stages

Source: Adapted from Asian Productivity Organisation (2012)

Figure 1 above demonstrates different stages of a product's life cycle where the concept of 'eco' can be incorporated. A product can be designed in such a way that it will meet environmentally friendly standards at all stages of its life cycle; however, incorporation of eco-design in just one or two stages will also make a product environmentally friendly. For example, use of raw materials produced from recycled and biomass, use of less energy and water, minimal waste and pollution, recyclability and recoverability are some criteria to be met (Andersen 2007). Eco-friendliness is a concept that can be applied to any industry, even a fast moving consumer goods or service industry such as eco-tourism, which is an example of an eco-industry. There are several eco-products available in the current market. The Eco-products Database prepared by the Asian Productivity Organisation classifies eco-products into four categories: eco-materials, eco-components, eco-products and eco-services, as shown in the figure below from the (Asian Productivity Organisation 2012).

| | |
|--|--|
| <p>ECO-MATERIALS</p> <ol style="list-style-type: none"> 1. Metals 2. Polymers 3. Natural materials 4. Foam 5. Ceramics and glass 6. Composites 7. Others | <p>ECO-COMPONENTS</p> <ol style="list-style-type: none"> 1. Construction components 2. Electrical and electronic components 3. Semiconductor-related devices and components 4. Machine parts 5. Automobile parts 6. Packaging 7. Others |
| <p>ECO-PRODUCTS</p> <ol style="list-style-type: none"> 1. Home electric appliances/lighting 2. Carriers/automobiles 3. OA/IT equipment 4. Office supplies/furniture 5. Apparel/textiles 6. Household goods and equipment 7. Building and civil engineering equipment 8. Machines and equipment 9. Others | <p>ECO-SERVICES</p> <ol style="list-style-type: none"> 1. Product-related services (maintenance, upgrading, repair/reform) 2. Reuse and recycling services (collection, etc.) 3. Outsourcing services (waste disposal, control of hazardous items, chemical treatment, facility management) 4. Management-related services (consulting, accreditation, analysis, evaluation, etc.) 5. Others (e-commerce, eco-tourism, hotels, information transfer, etc.) |

Figure 2: Classification of eco-products

Source: Adapted from (Asian Productivity Organisation 2012)

2.2.2 Eco-apparel products

According to Figure 2, eco-apparel fits into the segment 'Apparel/textiles', under the category 'Eco-products'. The terms 'environment friendly apparel' and 'eco-apparel' are interchangeable. A reasonable consideration is taken by eco-apparel companies in regard to the impact of their production and trade on the environment as well as on people. Eco-apparel products are designed to have minimal negative effect on the ecosystem of our natural environment. One of these types of apparel is that which is designed, produced and distributed by organic methods (Klonsky & Tourte 1998a). In addition to organic materials, hemp and bamboo textiles are some commonly used textiles in the production of eco-apparel. Eco-apparel can also be produced from recycled clothing (Mintel 2009).

History of eco-apparel

There are different labels for eco-apparel which correspond to whether they are green, organic, or both, in terms of meaning and definition (Vardas 2010). Though the history of apparel manufacture can be traced back centuries, it started significantly growing during the 1960s, when new techniques and materials of production were introduced. Gradually, a direct impact was seen on river water due to the waste released carelessly by industries. Some reactive laws were implemented by a number of European countries in regards to production processes and waste water treatment; however, industries could still manage to gain permits to continue their processes as it were. For example, the Finland Water Act came into existence in 1961 but it took almost nine years to change the industrial waste treatment practices there (Niinimäki & Saloniemi 2008). It was in the early 1970s when the world finally realised that the natural resources we have are limited (Meadows, Rome & Associates 1972). The industrial production practices of companies then became increasingly criticised. In response to this, many industries started working on minimising their impact on the environment. Since the textile industry required the use of a great deal of chemicals and water for dyeing and printing processes, waste water treatment was the major issue. For example, one of the Finnish companies constructed a waste water treatment plant

in 1977 (Rautio 2006). During the 1980s, the environmental laws and regulations in developing countries, public awareness about the need for protecting environment, and the market competition all drove more focus onto the environment. During the early '1990s, the authorities slowly shifted their focus to the prevention of environmental damage rather than maintaining it on the treatment for pollution. This was a proactive approach, and led to the necessity of exploring the possibilities of eco-design (Spangenberg 2001). One of the milestones in the history of eco-clothing was the launch of the Esprit Ecollection in November 1991 (Thomas 2008). Natural dyes, organic materials and natural fibres started being used to manufacture clothing products. However, due to their high cost and purchase price, this trend could not last long (Lewis & Gertsakis 2001).

In 1992, the Rio Summit relieved European industries of the compulsion of informing the public of the origin of their products. This resulted in the outsourcing of industries, including clothing industries, from wealthy, industrialised nations to countries with lower production costs (Niinimäki & Kääriäinen 2008). Slowly, fashion companies started manufacturing clothes overseas at low cost and were able to make their clothes accessible to the masses. Meanwhile, the concern about the impact of industrial processes on the environment kept growing. People were even more anxious about the use of pesticides, huge amounts of water and fertilisers for the production of cotton (Lewis & Gertsakis 2001). The waste from the production and use of clothing products continued to increase. During the early 21st century, the concept of recycling textiles emerged in the market. Companies started focusing on this to reduce pollution levels. Despite this turn in the right direction, products of low quality were being produced more and more, due to the price of clothing decreasing. This reduced the possibility of recycling the textiles and thus most cheap clothing products ended up in landfills. The need for a design and manufacturing process which would increase the ability of the product to go through multiple life cycles was emerging. Eventually, the cradle to cradle principle was eventually launched (McDonough & Braungart 2002). This principle is about redesigning old products and materials. Under this design, technical nutrients of

products are recycled to produce another product, and biological nutrients are returned to the natural environment.

Eco-apparel products' characteristics and its market size

Nowadays, new lines of clothes that are stylish and organic while still adhering to fair trade regulations are being produced. Big brands like H & M (Shen 2014) have started using sustainable fabrics and fair trade practices as well. There are several eco-friendly alternatives to conventional products in the market. Eco-apparel is produced using biodegradable fibres produced from renewable sources like plants which are grown using sustainable farming techniques such as use of less chemicals and more organic fertilizers (Steffen, Marin & Müggler 2013). Some eco-apparel products are produced using fibres produced from recycled materials like plastics. These products do not use chemical dyes and thus they are not colourful. Eco-apparel is produced through processes that use less water and energy than the traditional textile manufacturing processes. Table 2 demonstrates some types of eco-apparel available in the market, labelled 'eco' on the basis of the materials used in their production and because of their features.

Table 2: Eco-apparel products' characteristics

| Product | Eco-fibre | Features and benefits |
|-------------------------------|--|---|
| Organic cotton | Cotton grown without using chemicals or less chemicals or less water (Myers, Stolten & Myers 1999) | Absorbent, soft, non-allergic |
| Flax linen | Natural fibre produced from inner core of bark and stem (Akin, Himmelsbach & Morrison 2000) | Very high tensile strength, biodegradable (Mohanty, Misra & Hinrichsen 2000) |
| Bamboo fibre | Fibre made from bamboo | Natural antibacterial, biodegradable, absorbent (breathability and fast drying), soft, bright UV protective (Erdumlu & Ozipek 2008) |
| Hessian cloth (burlap) | Cloth made from jute fibre | High tensile strength, biodegradable (Mohanty, Misra & Hinrichsen 2000) |
| Cork fabric | Made from natural cork (Mestre & Gil 2011) | Long durability (Mestre & Gil 2011) |
| Tencel | Made from wood pulp | Antimicrobial, insect-free, aroma finishing and textile dyeing used (Nostro et al. 2003) |
| Hemp | Hemp fibre to make cloth | High tensile strength, biodegradable (Mohanty, Misra & Hinrichsen 2000) |

| | | |
|--------------------|---|--|
| Ingeo fibre | Made from renewable sources such as sugar and corn starch | Dimensional stability, comfort, performance in sportswear and casual wear (Phillips et al. 2004) |
|--------------------|---|--|

Source: Developed for this study

The fibres mentioned in Table 2 above are generally used to produce eco-apparel. The apparel made from hemp, bamboo and organic cotton are most commonly available. This apparel ranges across women's wear, men's wear and children's wear. Some of the designs of such eco-apparel are maternity clothing, T-shirts, pants, dresses, skirts and leggings, underwear, sportswear and so on. Even nappies for babies are being produced with natural fibres. However, the market size of eco-apparel is very small when compared to the world clothing market. In 2010, the monetary value of the world garment, textile, footwear and luxury industry reached almost USD 2,560 trillion (Bodimeade 2013), while at the same time the market size of clothes made from organic cotton was estimated to be USD 15.7 billion in 2015 (Textile Exchange 2011). There is a huge market opportunity lying ahead for eco-apparel and this may be taken advantage of through the introduction of robust strategies that can create an urge in consumers to buy eco-apparel over regular apparel. Before developing a marketing strategy, a sound knowledge about the current consumers and market of eco-apparel is necessary. Information such as who the consumers of eco-apparel are and the barriers or challenges that decrease their chances of using eco-apparel, will help identify the focus areas.

2.2.3 Consumers of eco-apparel

The phenomenon of buying and using environment friendly or eco-products such as eco-apparel is called green consumerism. The consumers buying such products are called green consumers. Green consumers are also labelled environmentally conscious or ecologically concerned consumers (Bhate & Lawler 1997; Neilssen & Scheepers 1992; Prothero & McDonagh 1992). These consumers believe that it is important to protect and preserve our natural environment and they act on this belief while purchasing products. The internal factors that stimulate consumers to buy eco-products are their environmental values (Butler & Francis 1997) and because of these values, they prefer buying products whose production, distribution, usage and disposal require less energy, produce less waste, and do not

harm endangered animals (Balderjan 1988). Green consumers evolved over time and are now also called 'ethical consumers'. In addition to environmental concerns, ethical consumers also consider social matters such as social injustice, fair trade and human rights when making a purchase (Newholm & Shaw 2007). Ethical consumers have a strong belief system regarding consumption (Niinimäki 2010). The marketing advertisements and claims of eco-products are heard and acted on only by ethical consumers. These consumers demonstrate a lesser response to products without claims of environmental benefits (Kim & Damhorst 1999). They do not buy products made from animal leather or fur. They prefer to buy eco-friendly products because they believe that the environment and society are important and are worth looking after. They are often ready to pay a higher price for green products even if the product quality is lower (D'Souza, Taghian & Lamb 2006). They frequently choose products on the basis of what is right and what is wrong, based on their values and beliefs (Cherrier 2007). The one common trend in the behaviour of eco consumers is that their purchasing choice is not influenced by themselves but instead by the external world around them (Harrison, Newholm & Shaw 2005). However, each and every eco consumer may not demonstrate an equal magnitude of environmental consciousness and attitude (Cowe & Williams 2000).

In 2001, Peattie segmented green consumers into three categories. The first is consistent non-ecologists who are not concerned about the environment; the second is consistent ecologists who are environmentally concerned; and the third is in between the first two, showing different levels of environmental orientation during the consumption process (Peattie 2001). Similarly, Goswami (2008) conducted research to identify the customer segments for clothing with eco-labels in India. The results of the study suggested that there are three segments of eco-apparel consumers in India. Table 3 shows the three levels of green consumer segments and their characteristics.

Table 3: Customer segments for clothing with eco-labels in India

| Segments | Name of Segment | Characteristics |
|--------------------------|-------------------------------|--|
| Segment 1 (64.2%) | Light green apparel consumers | <ul style="list-style-type: none"> Majority from Bihar, India Slightly negative to environmental concerns and involvement in certification, negative on importance of certification More males (70%) than females (30%) |
| Segment 2 (19.8%) | Dark green apparel consumers | <ul style="list-style-type: none"> More likely to be Bengali/Gujrati Were positive to environmental concerns and involvement in certification, positive on importance of certification 42% females and 58% males 52% post-graduate professionals |
| Segment 3 (16%) | Non-green apparel consumers | <ul style="list-style-type: none"> Highly negative to environmental concerns and involvement in certification, positive on importance of certification 77% males and 23% females |

Source: Adapted from Goswami (2008)

The dark green consumers are the core group of consumers that are completely positive towards environmental products. This segment comprises only 19.8 % of the total sample studied by Goswami (2008), which is a small portion; while the other two segments, which are negative towards environmental products, comprise 80.2 % of the total samples studied. Similarly to Goswami (2008), do Paco et al. (2009) found three segments of consumers, as shown in Table 4, out of which only one segment (33.33% approx.) of consumers consisted of green activists while the other two consisted of either those not committed to environment or of those who with little knowledge about the environment.

Table 4: The green consumer segments investigated

| Segment | Demography | Attitude |
|----------------------------|--|--|
| Uncommitted | <ul style="list-style-type: none"> 18-34 years of age £500-1000 income Secondary and higher secondary level education Living in urban areas Have knowledge about the issues | <ul style="list-style-type: none"> Negative to environmental aspects |
| The green activists | <ul style="list-style-type: none"> 25-34,45-54 years of age Higher level of education Qualified jobs at managerial level High income | <ul style="list-style-type: none"> Positive towards environmental aspects Skeptical about environmental claims of advertisements |

| | | |
|----------------------|---|---|
| The undefined | <ul style="list-style-type: none"> • Higher age groups • Lower education level • Sales, service, administrative, unskilled workers • Up to £1000 income | <ul style="list-style-type: none"> • Negative position towards environmental issues • Little knowledge about environment • Do not consider that their actions can change the environment |
|----------------------|---|---|

Source: Adapted from Finisterra do Paço, Barata Raposo and Filho (2009)

Amongst all, the most inclusive and comprehensive segmentation of green consumers was developed by Ottman and Reilly (1998). This segmentation was done according to consumers' disposition to the conservation of the environment. The earlier two studies had three segments of consumers, while Ottman and Reilly segmented consumers into five different groupings ranging from consumers who are 'completely unwilling to change' to 'loyal green consumers'. Table 5 presents the five levels of green consumers and their characteristics identified by Ottman and Reilly (1998).

Table 5: Segmentation of green consumers

| Segment | Characteristics |
|---|---|
| Loyal green consumers | <ul style="list-style-type: none"> • Believe that one must have environmental awareness • Ready to pay up to 40% more for eco-friendly products • Politically and socially active • Try to educate and persuade other consumers to buy eco-friendly products |
| Less devoted green consumers | <ul style="list-style-type: none"> • Strongly concerned with environmental issues • Very active in changing their lifestyle • Admire the activity of loyal green consumers • Not actively involved themselves • Ready to pay 10-22% more for eco-friendly products |
| Consumers developing towards green | <ul style="list-style-type: none"> • Approve the activity of green consumers, however show no difference in their own purchase behaviour • Ready to pay 4% more for eco-friendly products |
| Conservative consumers unwilling to change | <ul style="list-style-type: none"> • Think that it is the responsibility of state and the government • Do not have sufficient information about environmental issues to make an informed decision • Ready to buy eco-friendly products if the price is the same |
| Consumers completely unwilling to change | <ul style="list-style-type: none"> • Do not consider environmental awareness to be serious • Do not take any initiative |

Source: Adapted from Ottman and Reilly (1998)

Further, Ottman and Reilly segmented green consumers in line with their motives. According to the theory, there are three main motives for going green. Among green consumers, one group of people is concerned about the natural environment. These people believe in the economic use of water and energy. The second group of green consumers is concerned about their personal health. These people prefer buying organic food. The third group is animal lovers, and includes people who boycott non-vegetarian lifestyles (Ottman & Reilly 1998).

From the overall review of literature, it is found that a small segment of consumers is motivated towards the environment and environment friendly products, while a large segment still does not exclusively prefer environmentally friendly products such as eco-apparel. In another survey, it was found that only 12% of the population actively considered purchasing eco-friendly products (Stern & Ander 2008). Dark green, green activists, and loyal green consumers are consumer groups with very strong ethics. However, they comprise a niche market. There are larger numbers of consumers with what is labelled 'easy ethics' (Cowe & Williams 2000); these are, for example, uncommitted, unidentified, conservative and unwilling consumer segments. These consumers may not necessarily favour environmental behaviour. Surprisingly, even the niche consumers with strong ethics do not show green purchase behaviour all the time (Carrington, Neville & Whitwell 2010; Susanne & Carolyn 2005). There can be several marketing barriers for eco-companies to move from niche to a larger segment of consumers.

2.2.4 Marketing barriers of eco-apparel

Marketing basically involves the management of the demand for a product or service (Kotler & Armstrong 2009). The purchase behaviour of consumers is directly related to the marketing of a product. Consumers' buying process starts with the identification of their needs and wants, which is followed by finding a solution to satisfy those needs. The American Marketing Association defined marketing as 'an organisational function and a set of processes for creating, communicating and delivering value to customers and for managing customer relationships in ways that benefit the organisation and its stakeholders' (Keefe 2004). Customer research,

sales and market development are critical processes of marketing (Ulaga & Chacour 2001). Marketing campaigns focus on targeting a consumer segment and positioning a product in order to make consumers buy that product. To target a potential and profitable segment of consumers with a product specifically designed for that group of consumers, thorough marketing research, planning and implementation of the plan under a controlled mechanism is necessary. On a tactical level, marketing involves determining the pricing, distribution, communication and promotion mix for the product (Kotler & Armstrong 2012). Overall, marketing is an integrated business process involving product development management, supply chain management and customer relationship management (Srivastava, Shervani & Fahey 1999).

The marketing of apparel involves several processes. The process starts with thorough market research and developing an understanding of the demands of the market. Initial decisions about the life cycle of the product are made, and at the same time, profitability of the product is considered (Dunford 2004). Stylists and designers create a model for each part of the product. Each part is made and assembled by the production design department (Dunford 2004). Subsequently, the actual product is distributed and promoted through different channels. The clothing value chain is dominated by the buyer, i.e. purchaser determined, and is therefore dominated by extensive retailers, branded manufacturers and advertisers which control worldwide production systems and stipulate supply particulars (Roberts & Thoburn 2002). These retailers collect and pass information about the latest demand on designs, patterns, colours and materials to the manufacturers. They do not own their own production factories; however they do have a great influence over the prerequisites, quality and price of the product. The end users are demanding a greater variety of products more frequently and with shorter seasons (Nguyen 2004; Nordås 2004). In response, retailers have been consistently demanding better quality products with varied designs at lower prices. Simultaneously, the manufacturers are also facing the challenge of producing unique designs in low quantities. Eco-apparel production involves thinking of the environment during design, material selection, manufacturing process, delivery and

the management of the product after its use. The designers must focus on increasing the recyclability, manufacturability and disassembly of their products to decrease their negative effects on the environment and make them more attractive as eco-products (Gungor & Gupta 1999). The challenges or barriers faced at any stage of marketing, from production to promotion, will keep eco-apparel away from the majority of consumers. These barriers are generally called the marketing barriers (Cantor & Strohlic 2009).

Unfortunately, there are no acknowledgements or rewards in place for producing more environmentally friendly products (Jaffe, Newell & Stavins 2005), making it less likely that companies will make the transition to more environmentally friendly practices. The major segment of market does not value the effect of reducing negative environmental activities. Moreover, the integration of environmentally friendly components into conventional or existing products is one of the major challenges of eco-products. Such integration increases the manufacturing cost of the product, thereby increasing its price. There is a lack of proper administration and policies to look after the production and promotion of eco-products (Nikolaou, Ierapetritis & Tsagarakis 2011). One of the main reasons behind consumers not buying eco-products is they doubt that environmentally friendly products will perform as desired (Josephine & Ritsuko 2008). Consumers also find it difficult to differentiate these products from other products and do not want to spend more time searching for and buying eco-products (Tanner & Wölfling Kast 2003).

Eco-apparel is a type of eco-product; nevertheless, the barriers of general eco-products may not necessarily be the barriers of eco-apparel. Consumers have varied needs and wants, and consequently products and services must be tailored accordingly (Ferrell & Hartline 2011). Consumers may be attracted by environmental factors while buying a detergent or a plastic, for example, but while buying apparel they may give priority to personal needs rather than green elements (Joergens 2006). Should the eco-apparel not meet these personal needs, consumers will seek fulfilment of them elsewhere. One of the most common marketing barriers of eco-apparel is the high price of the products (Gam et al. 2010). The

premium price level of eco-apparel products weakens the tendency of consumers to make positive eco-apparel consumption decisions (Chan & Wong 2012). In addition, the lack of design, limited information, restricted availability of products and lack of trust are other possible reasons for not purchasing eco-apparel. Consumers tend to find it difficult to differentiate green brands from other products (Ottman, Stafford & Hartman 2006). Also, consumers are often unable to find eco-apparel in their regular retail shops, as it is not widespread enough to be available everywhere. However, previous researches describing the marketing barriers of eco-apparel are very scarce. Researchers have suggested that positive attitudes are cultivated when the promotion message of an eco-brand contains extended or explicit information (Yan, Hyllegard and Blaes (2012b). Explicit messages could be effectively conveyed through social media, as it is a powerful method for the advancement of environmentally benevolent products (Mukherjee & Onel 2013). The majority of eco-apparel companies have adopted digital technology into their marketing strategies. There is an increasing number of eco-apparel companies selling and promoting their products online (Scaturro 2008). People Tree, one of the companies producing eco-apparel, works in a joint effort with prominent, universal designers like Orla Kiely and Bora Aksu, to create environmentally friendly clothing that is also fashionably appealing.

Despite the best efforts of these companies, however, eco-apparel has not become mainstream apparel or a mass market product yet. It remains a niche market currently (Beard 2008). The majority of the market still consists of the conventional or non-eco-apparel (Lambert 2014; Luz 2007). When consumers are not buying eco-apparel, it indicates that the marketing of eco-apparel is ineffective and it has not been able to overcome the marketing barriers (Prindle et al. 2007; Sonnenberg, Jacobs & Momberg 2014) that are preventing consumers from buying it. These marketing barriers could be unidentified so far, or have possibly been addressed insufficiently in past analyses. Thus, there is a need for extensive investigation into the marketing barriers of eco-apparel. The success of eco-apparel depends on how it performs across key factors of competition in the industry. Satisfactory performance on key factors represents the minimal requirement to compete and

be successful in an industry (Ketelhöhn 1998). Evaluation of performance of eco-apparel across key factors of competition in apparel industry will help in exploring the marketing barriers of eco-apparel (Bergen & Peteraf 2002; Kim & Mauborgne 2002). Therefore, a thorough review has been undertaken by this researcher on the key factors of competition in the apparel industry and the performance of eco-apparel across those factors.

2.2.5 Key factors of competition in the apparel industry

Key factors of competition are the factors that companies within an industry compete on (Kim & Mauborgne 2002). The demand characteristics, technology employed, and characteristics of the product/s are some of the foundations of those key factors. While making a decision to buy a particular brand, apparel consumers tend to refer to some key specifications or elements of items to compare and assess alternatives (Kotler & Armstrong 2012). These factors are constitute part of the reflection process of consumers when deciding on their needs or wants regarding a specific product (Blackwell, Miniard & Engel 2001; Forney, Joo Park & Brandon 2005). Consumers' evaluations of such factors provide an insight for apparel manufacturers about how they should tailor their product design and promotion tactics (Forney, Joo Park & Brandon 2005). In a nutshell, the key factors of competition are the factors in which companies must invest in order to remain competitive (Kim & Mauborgne 2002), as shown in Table 6 . Table 6 demonstrates the possible dimensions of key factors of competition.

Table 6: Competitor analysis factors

| <i>Modes of Competition</i> | <i>Possible Dimensions</i> | <i>Sample Indicators</i> |
|----------------------------------|--|------------------------------------|
| Product line width | Breadth of product lines Breadth of types within lines | Product lines and items |
| Features | Physical aspects of individual products Packaging Terms and conditions | Shape Style Colour Design |
| Functionality Performance | Reliability Durability | Speed Breakdowns |

| | | |
|----------------------------------|---|--|
| | Ease of use Taste Shelf life | Customer perceptions |
| Service | Maintenance Installation Help line Training Technical assistance Repair Response time | Contracts Service announcements and programs Customer reports Speed of competitors' responses |
| Availability | Distribution channels Amount Delivery | Individual channels |
| Image and reputation | Image of the company Image of products Reputation for rapid response time Reputation for best value | Content of advertising Actions and words of customers Third-party reports |
| Selling and relationships | Customer coverage Detailing of products Relationships with distributors Relationships with end users | Actions of sales force Frequency of calls Judgments of channels Customers' comments |
| Price | List prices Discount prices Price-performance Price-value | Actual prices Channel/Customer assessments |

Source: Adapted from (Liam 1999)

The apparel consumers evaluate products on the basis of image, quality, colour/style and design/beauty (Forney, Joo Park & Brandon 2005). Consumers also consider emotional and social values when buying apparel (Chi & Kilduff 2011). Apparel consumers mostly prefer product attributes such as durability and performance, style, fit and price (Saricam et al. 2012). Skgkao (1994) says that workmanship, physiological comfort, usefulness, physical and chemical properties, and suitability to individual preference and fashionability, are the key elements of apparel. Further, factors like fabric and garment construction, care, value, style and service are also key factors of apparel (Abraham-Murali & Littrell 1995), but the importance of the factor of price, depends upon the level of other attributes of apparel (Abraham-Murali & Littrell 1995). There is one more report that identified

seven different factors of apparel quality. The factors are; quality as performance, compliance, garment care, appearance, construction/workmanship, style/fashion and fit (Rayman, Burns & Nelson 2011). Consumers sometimes even consider emotional and social values while buying apparel (Chi & Kilduff 2011). In general, there are three key success factors of the apparel industry, and these are; capturing the market's mood, quick response to market needs, and shifting inventory risk of suppliers or retailers (Ketelhöhn 1998). The apparel industry is driven by the ever-fluctuating trends and fashion styles that keep shifting consumer demands from season to season. The success of an apparel company is determined by its continuous development and its marketing of a variety of innovative and fashionable brands or products. Conventional apparel companies focus on looks of the product such as styles, designs, colour (Hines T & Bruce M 2007). Consumer choice is ever changing and apparel companies need to develop different designs in short periods of time at low cost (Bhardwaj & Fairhurst 2010). On the other hand there are eco-apparel companies emerging within the apparel industry. These companies invest in the environmental dimension of their products to a large extent. The apparel industry needs to broaden its horizon and redesign its research in such a way that it will incorporate the needs of environmentally conscious consumers into the range of products it offers (Bhardwaj & Fairhurst 2010). There is insufficient analysis presently about the factors of competition in the apparel, including the eco-apparel industry. This research will re-establish the key factors of competition in the apparel industry that will incorporate both conventional apparel as well as eco-apparel companies.

2.2.6 Marketing approaches for eco-apparel

Marketing is a crucial component of efforts to make eco-apparel a successful product. Marketing is associated with the behaviour of consumers towards products or services (Chevalier & Mayzlin 2006; Liu 2007). With the emerging trend towards green consumerism, companies have started integrating environmental concerns as a competitive strategy into their corporate orientation and social goals when developing marketing policies and practices (Menon & Menon 1997).

Previous literature indicates that competitive pricing, product strategies based on consumers' primary needs and environmental factors, as well as public relations campaigns, can be viable marketing approaches for the growth of eco-products (Wong, Turner & Stoneman 1996). Green brands can be built by communicating with consumers about the benefits of environmentally benevolent products through social media (Mukherjee & Onel 2013). However, this research was conducted considering eco-products in general. There is very little literature that specifically contributes to the strategic marketing of eco-apparel. Among the literature that has been written, some researchers have suggested that the sharing of explicit information about eco-apparel can create positive attitudes among consumers (Yan, Hyllegard & Blaesi 2012b). They believed that the marketing barriers to eco-apparel can be overcome by highlighting the environmental superiority of eco-apparel; however, there are also other researchers who have found that eco-apparel must focus on fashion oriented factors or physical factors more than on environmental superiority in order to attract more consumers (Gam 2011). The marketing concepts and strategies currently in existence for environmentally friendly products are insufficient and have not been successful in overcoming the challenges faced by eco-products (Sonnenberg, Jacobs & Momberg 2014), thereby restricting the ability of companies to make them the choice of the majority of consumers. There is a need for an efficient marketing strategy that can establish a market for eco-apparel among the consumers that are not using eco-apparel at the moment. Therefore, the objective of this study is to design a marketing strategy framework for eco-apparel. A marketing strategy framework is a set of integrated decisions and actions by which a business expects to achieve its marketing objectives and meet the value requirements of its customers (Slater & Olson 2001). It must be capable of creating competitive advantages over its rivals (Ferrell & Hartline 2011).

2.3 Marketing strategy

A marketing strategy is a set of integrated decisions and actions by which a business expects to achieve its marketing objectives and meet the value requirements of its

customers (Slater & Olson 2001). It must be capable of creating competitive advantages over its rivals (Ferrell & Hartline 2011; Levie 2006) in order to survive. A marketing strategy defines the overall direction and goals for marketing. It explains exactly how a company is going to deliver its products to customers (Kotler & Keller 2009). It involves the analysis of the current strategic state of a company, and the formulation, evaluation and selection of appropriate strategies that contribute to the goals and objectives of the company. Further, it includes the evaluation and analysis of customers, competitors, and target markets, as well as of elements of the technological, economic, cultural and political/legal environments that may act as barriers to, or impacts on success. When an intensive analysis of the market is performed, a strategic profile can be developed to recognise business choices, establish a set of goals and agree on the ideal marketing mix or tactic to achieve these goals. A marketing strategy establishes a purpose and unified marketing direction for the firm. In other words, strategic marketing is all about segmenting the consumers, selecting a target segment—a distinct group of consumers who are likely to buy the firm’s product—and designing a marketing strategy for this target segment of consumers (Kotler & Armstrong 2012). Planners must also choose implementation tactics: specifically, effective ways to use the marketing mix tools of product, promotion, price and distribution to reach and influence prospective buyers (Crawford & Di Benedetto 2008).

The framework in Figure 3 demonstrates clearly that the marketing strategy planning starts with analysis of the market and is then followed by market selection and marketing mix model targeting the selected market.



Figure 3: Framework of strategic marketing

Source: <http://www.strategyhub.net/2011/01/framework-of-week-45-strategic.html>

The idea of marketing strategy in academic language was brought forward frequently and more strongly by Bartels during the 1950s (Shaw 2012). Later, the marketing strategy was added into his books of marketing management and this resulted in the term being used more often (Bartels 1988). However, the literature related to the history of marketing strategy is found both in managerial economics (Forrester 1959) and marketing management (Smith 1956). Later, the concept of marketing strategy was included in marketing management in the early 1960s (Davis 1961; McCarthy 1960). Subsequently, Ansoff (1965) developed the concept of corporate strategy, and it was then incorporated into the mainstream marketing management textbooks during the late 1960s (Kotler 1967; McCarthy 1960). The corporate strategies of growth propounded by Ansoff's (1965) 'growth strategies' are found in many marketing publications. There are four components of Ansoff's growth strategies that make them successful. They are: market penetration, market development, product development and diversification. This research is focused on market development and product development of eco-apparel. Market development involves expanding sales by adding new customer segments (irrespective of whether the product is old or new). Product development is all

about adding new models, styles, and colours of products to the existing product line (Ansoff 1965).

Strategic marketing faces a lot of challenges. These challenges arise due to the increase in the numbers of demanding customers, turbulent markets, rapid expansion of technology and, of course, globalisation. There are huge numbers of consumer segments, products, media, and distribution channels, making it hard for businesses to know what type of marketing would best suit what they are trying to achieve. Understanding the ins and outs of consumer segments has become very difficult due to the turbulent and complex marketplace (Court 2004). Society has recognised that our resources are limited and so must be used cautiously. With this, the need for marketers to revisit the theories and strategies to address this increasing environmental cost, is arising. Also, the recent financial crisis and subsequent decrease in consumer spending has forced managers to devise more balanced and sustainable marketing strategies (Kotler 2011). It is always a challenge to decide which marketing strategy would best suit a product at a particular point in time.

2.3.1 Competitive marketing strategy

The expansion of the market of eco-apparel means competing with other apparel companies within the industry, as growth of one company occurs at the expense of its competitors (Déri 2013). Competition is the rivalry among sellers trying to achieve such goals as increasing profits, market share, and sales volume by varying the elements of the marketing mix: price, product, distribution, and promotion (Singh 2012). Competition causes commercial firms to develop new products, services and technologies, in order to give consumers greater selection and better products. One of the best ways to analyse the competition is to investigate the performance of a company against key factors of competition (Porter 1980). Since the conventional apparel industry is the apparel market leader, the rules of the apparel market are dominated by the sellers of conventional apparel. To gain a larger market share, the eco-apparel industry must adapt the rules of conventional apparel marketing. Proximity is a prerequisite for increasing market share in such

cases (Sharp 1991). Integration of minimum necessary level and mix of key factors to compete in the apparel market, will help bring eco-apparel closer to mainstream. Achieving competitive product offerings and services helps an organisation to compete and to expand its market (Sharp 1991). The strategy thus developed is a competitive marketing strategy. A competitive marketing strategy can help develop eco-apparel products and their markets. Thorough analyses of the factors of competition in the apparel industry can give a better idea of how to develop such a marketing strategy for eco-apparel. The ultimate objective of analysing the factors of competition is to learn about the importance of different factors and the performance of companies across those factors of competition (Kim & Mauborgne 2015). It begins with the identification of the key factors of competition in the apparel industry and then subsequently these practices are understood and applied to improve the performance of eco-apparel. The actual performance of the eco-apparel company is compared with the apparel industry's best practices in this process (Kumar, Antony & Dhakar 2006). Thus, the investigation will reveal best apparel industry practices and the eco-apparel companies can hence apply those practices to increase their performance (Camp 1989).

The analysis of eco-apparel across key factors of competition can be done through the use of strategic tools like the Strategy Canvas and the Four Actions Framework (Kim & Mauborgne 2002; Kim & Mauborgne 2015). These tools are successfully used in the service industry, but have been applied to very few physical products (Kim & Mauborgne 2002; Kim & Mauborgne 2015). Their application to the eco-apparel sector is novel and worthwhile.

2.3.2 Strategy Canvas and Four Actions framework

The usual strategic planning tools are not capable of visualising and clarifying the crucial factors for most managers (Kim & Mauborgne 1999; Kim & Mauborgne 2002, 2004, 2005c). Kim and Mauborgne (1999, 2002, 2004, 2005b) developed an analytical tool, known as the Strategy Canvas and Four Actions framework, to portray the strategic profile or value curve of a company against that of its

competitors by plotting the various factors that affect competition in the industry on a graphical chart.

The approach of the Strategy Canvas is to draw the company's strategic profile—or value curve—showing the level of investment or the level of offering in regards to the factors of competition. The respective strategy focus would then be known by the different stakeholders of the company, including the customers. Figure 4 below is a representation of how a Strategy Canvas might look.

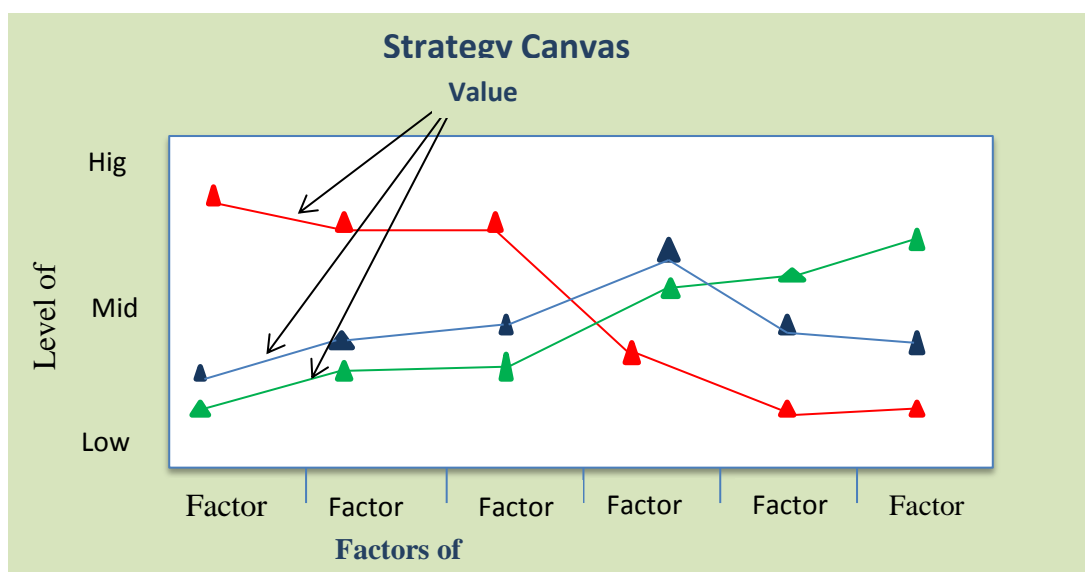


Figure 4: Strategy Canvas Example

Source: Adapted from Kim & Mauborgne (2002)

In the Strategy Canvas, the vertical axis indicates the degree to which a company and the providers of alternative services invest in the competitive factors. A relatively low position means a company invests less and, hence, offers less on that factor. By connecting the dots across all the factors for each player, a researcher can reveal the strategic profiles of a company, its direct competitors, and its main alternatives. The current offerings of eco-apparel companies and other competitors across the factors on the horizontal axis can be drawn as shown in Figure 4 above. The curve then is called a value curve and shows the strategic profile of the company and competitors. There can be any number of factors of competition. The

lines in the chart are imaginative and are drawn to give a pictorial illustration of Strategy Canvas.

This framework helps companies to break through the difficult process of strategy formulation. The Strategy Canvas will provide a visual representation of how eco-apparel companies are investing in the value dimensions or factors of competition. The Strategy Canvas helps to communicate strategies in an easier way so that they are understood by more people. There are cases where the application of Strategy Canvas has been proven to be the successful approach in formulating strategies for organisations. As an example, the European Financial services increased its revenue by 30% with the use of Strategy Canvas in developing a strategy (Kim & Mauborgne 2002). Some established companies like Apple, Canon, McDonald's and Air Asia have successfully implemented the Strategy Canvas. It has also been applied in business school (Khalifa 2009) and agribusiness (Jacobs 2012) to create a new value curve or strategic profile. However, there are some criticisms about Strategy Canvas. Critics say that the work of Kim and Mauborgne was descriptive in nature: the authors were good at interpreting the success stories of different companies and developed the relevant theory (Webber 2005); however, the framework developed by them does not provide a clear pathway and just gives a vague future direction (Raith, Staak & Wilker 2007).

The Strategy Canvas will show a clear picture of where eco-apparel companies are lacking. Eco-apparel companies may need to incorporate some of the best practices of the apparel industry into their value curve or strategy in order to continue. The company under study might want to eliminate or substantially reduce investments in certain areas, or they might dramatically increase investments in others. Sometimes they may even create new factors, thereby changing the industry's overall profile. Thus answers to the four questions in the Four Actions Framework will help build an Eliminate-Reduce-Raise-Create grid, a marketing framework for eco-apparel, which will give a new profile to the company. Decisions can be made with the help of the Four Actions Framework, which was also developed by Kim and Mauborgne, to complement the Strategy Canvas. The Four Actions Framework

requires a decision to be made on which factors will be eliminated, raised, reduced or created in order to construct a new market for the company (Kim & Mauborgne 2002). Figure 5 below illustrates the Four Actions Framework.

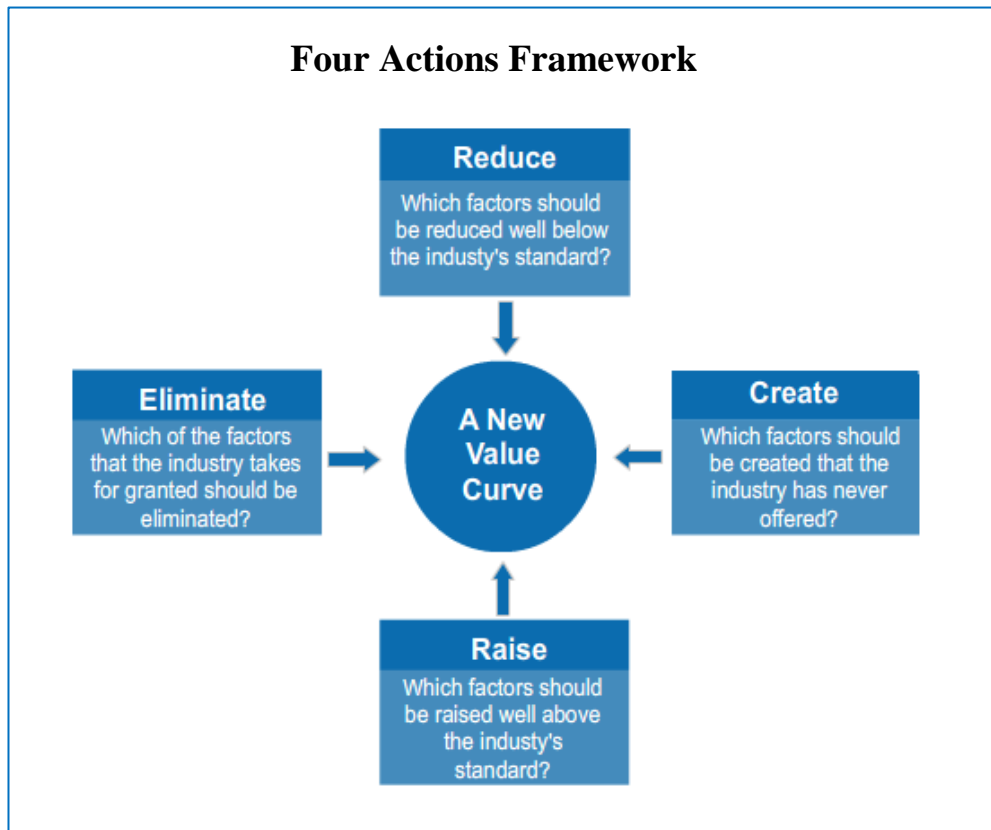


Figure 5: Four Actions Framework

Source: Adapted from Kim & Mauborgne (2004)

The application of Strategy Canvas and the Four Actions Framework in this thesis is relatively new to the apparel industry. The new strategic profile or value curve derived after the Four Actions Framework has been implemented will indicate some key marketing areas that eco-apparel must focus on. However, the implementation of this strategy would require a marketing mix model consistent with the new strategy.

2.3.3 Marketing mix

The marketing mix has four elements: product, price, place and promotion. It is a conceptual framework that allows any company to translate its marketing plans

into action. The practices, strategies and factors of marketing can be classified under the four dimensions of marketing mix. The 4Ps are the competitive factors of a company and can create a better competitive position for a company when compared to others (Constantinides 2006; Kotler & Armstrong 2012).

In earlier days, business personnel were described as mixers of different elements or ingredients (Culliton 1948). The phrase 'mixer of ingredients' spawned the idea of marketing mix. There were 12 elements in the marketing mix developed by Borden, who claims to be the first to develop a marketing mix model. The elements were divided into two parts (Frey 1961). The first part included the offering (product, packaging, brand, price and service) while the second part included methods and tools (distribution channels, personal selling, advertising, sales promotion and publicity) (Goi 2009). McCarthy (1964) categorised the 12 elements into the commonly known 4Ps, namely: product, price, place and promotion.

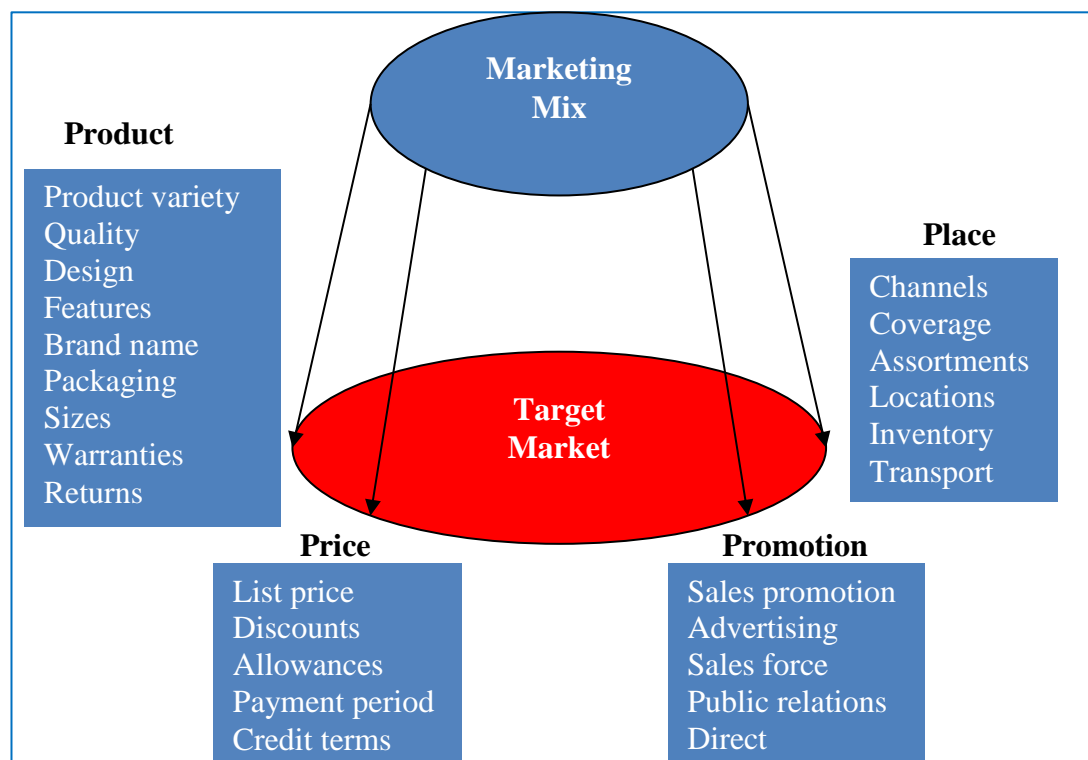


Figure 6: Variables of marketing mix

Source: Adapted from Kotler et al. (1999)

Figure 6 further demonstrates the existing 4Ps and their elements. A good balance of the elements of the 4Ps is necessary to position a product correctly in a target market. The relevance of marketing mix in this thesis is that the marketing related barriers of eco-apparel can be classified under the 4Ps. Further, the factors of competition can be related to any of the elements of the 4Ps. Moreover, once a new strategic profile is modelled for eco-apparel, the execution plan/tactic can be generally developed using the 4Ps of marketing mix (Kotler & Armstrong 2009).

The marketing mix has been criticised since the development of its framework and the majority of researchers are not satisfied with the 4Ps framework. Especially, researchers from the services marketing area have stated that the 4Ps are not sufficient to address the unique elements of services marketing and proposed several modifications to 4Ps (Rafiq & Ahmed 1995). Researchers criticised the fact that the concept of the 4Ps marketing mix is production oriented rather than customer oriented (Popovic 2006). The authors thought that the elements of marketing mix must be seen from the consumer's perspective also, and thus marketing mix elements were transformed from the 4Ps into the 4Cs: The "product" was converted into "customer solution"; "price" into "cost" to the customer; "place" into "convenience"; and 'promotion' into 'communication' (Lauterborn 1990). The other major criticism of the marketing mix theory is that some researchers consider marketing mix incapable of accounting for customer behaviour. It does not involve a seller's interaction and building of a relationship with any customer. Rather, it is a simple device that helps the management of a business to focus their marketing attention (Constantinides 2006).

2.4 Research problem

Table 7 demonstrates the systematic summary of key literature discussed in the literature review chapter. The table summarises the research design, key findings and limitations of previous research relevant to the marketing of eco-apparel. The summary table contains a review of the literature that is close to this thesis. It

demonstrates that the previous research was mostly conducted with a very narrow focus. The samples were from a very small population. For instance, the researches in Columns 10, 11, and 12 used university students as study samples. The research was conducted by using a subjective method, a survey method, exploratory method or secondary data review method. The researchers used non probabilistic samples. Moreover, the scope of sample was very narrow; for example, Researcher No. 15 used females from 19-22 years of age as study samples. However, the findings of this research are somehow relevant to the current research. The findings of the researchers in the summary are generally relevant to three areas of this thesis: a) some are relevant to key factors of competition; b) some are relevant to marketing barriers; and c) some are relevant to the marketing of eco-apparel.

Table 7: Summary of key literature

| S.N. | Author & Year | Area, Author, Year | Design | Findings | Limitation |
|------|------------------------------------|--|-----------------------------------|--|--|
| 1. | Abraham-Murali and Littrell (1995) | Consumers' perception of apparel quality over time: An exploratory study | Mailed questionnaire | Fabric and garment construction, care, value, style, product and services, community of residence, are the factors considered to predict the quality of apparel | Samples were solely consumers of one company, Lands' End, Inc |
| 2. | Wong, Turner & Stoneman (1996) | Marketing Strategies and Market Prospects for Environmentally Friendly Consumer Products | Mixed, Semi-structured interviews | Competitive pricing, product strategies balancing of consumer's primary need and environmental factors and public relations campaigns can be viable marketing approach for the growth of eco-products. | Products under study were limited to lead-free petrol, catalytic converters as a green feature in passenger cars, eco-friendly detergents and recycled paper |
| 3. | Josephine & Ritsuko (2008) | Pro-environmental products: marketing influence on consumer purchase decision | Questionnaire survey | 'correlation between consumer confidence in the performance of green products and their pro-environmental beliefs in general' 'consumers cannot easily identify greener products (apart from cleaning products) although they would favour products manufactured by greener companies, and they do not find the current product marketing particularly relevant or engaging' (Josephine & Ritsuko 2008, p. 281) | Used mothers with children only |

| | | | | | |
|-----|-------------------------------------|--|---|--|---|
| 4. | Tanner and Wölfing Kast (2003) | Promoting Sustainable Consumption: Determinants of Green Purchases by Swiss Consumers | Questionnaire survey | Green consumerism can be increased by addressing different beliefs, action-related knowledge, time barriers, as well as store differences Women are the 'gatekeepers' and have the power to make decisions, thus green products must act on these consumers Organically grown products are green products | Respondents limited to Bern city and rural setting around the city |
| 5. | Forney, Joo Park & Brandon (2005) | Effects of evaluative criteria on fashion brand extension | Survey | Image, quality, colour/style, and design/beauty of fashion products are key elements while purchasing apparels | Only female consumers from 3 cities of southwest USA |
| 6. | Ottman, Stafford and Hartman (2006) | Avoiding Green Marketing Myopia: Ways to Improve Consumer Appeal for Environmentally Preferable Products | Review of case descriptions of green products discussed in literature | 'green products have avoided green marketing myopia by following three important principles: consumer value positioning, calibration of consumer knowledge, and the credibility of product claims' (Ottman, Stafford & Hartman 2006, p. 34) | Used subjective methodology (literature review) |
| 7. | Beard (2008) | The branding of ethical fashion and the consumer: A luxury niche or mass- market reality | Theoretical discussion | Eco-fashion is a niche market and needs to overcome several challenges to attract more consumers. | Used only secondary data sources |
| 8. | Gam et al. (2010) | Quest for the eco-apparel market: a study of mothers' willingness to purchase organic cotton clothing for their children | Survey | 'mother's environmental concerns, environmental purchasing behaviour and recycling behaviour significantly affected their involvement in OCC, which further significantly determined mother's willingness to purchase OCC. However, mothers were not willing to pay a premium for purchasing children's OCC' (Gam et al. 2010, p. 684) | Limited to south Midwest USA Convenience sampling method |
| 9. | Bhardwaj & Fairhurst (2010) | Fast fashion: response to changes in the fashion industry, The International Review of Retail | Literature review | Highlighted the emergence of throw away concept in apparel industry Also, highlighted the need to address environmentally conscious consumers' needs | Used subjective approach |
| 10. | Rayman, Burns and Nelson (2011) | Apparel product quality: Its nature and measurement | Survey | Performance, components, garment care, appearance, construction/workmanship, style/fashion, and fit are key factors of apparel | Purposive sampling, only university students from business department |

| | | | | | |
|-----|-------------------------------------|--|--|--|---|
| 11. | Chan & Wong (2012) | The consumption side of sustainable fashion supply chain: Understanding fashion consumer eco-fashion consumption decision | Survey | 'The findings showed that only store-related attributes of eco-fashion positively influence consumers' eco-fashion consumption decision, yet, such relationship can be weakened by the price premium level of eco-fashion.' (Chan & Wong 2012) | Sample limited to Hong Kong Majority of respondents were students |
| 12. | Yan, Hyllegard & Blaesi (2012b) | Marketing eco-fashion: The influence of brand name and message explicitness | Experimental design, intercept survey approach | Advertising communications with explicit information on environmentally friendly products can create a positive attitude in consumers. | Sample limited to college students |
| 13. | Saricam et al. (2012) | Apparel Product Evaluation And Quality Perception Of Turkish Consumers | Survey | Durability and performance, style and fit, price are the key factors of apparel | Sample limited to Turkish consumers only |
| 14. | Mukherjee & Onel (2013) | Building green brands with social media: Best practices from case studies | Case study | Application of innovative features in social media page and interaction among consumers as well as brands through that media page can help build a successful green brand. | Research was done on selected category of products; hybrid-electric vehicles, reusable bottles, reusable bags, green leaning product, organic food |
| 15. | Sonnenberg, Jacobs & Momberg (2014) | The Role of Information Exposure in Female University Students' Evaluation and Selection of Eco-Friendly Apparel in the South African Emerging Economy | Qualitative research (exploratory and descriptive) | Audio visual and printed information are not able to influence consumers to prefer eco-apparel. Thus, eco-apparel needs more effort in development and marketing. | Used non probable purposive sampling, samples were females only, limited to narrow age group 19-22, also limited to students from University of Johannesburg, cannot be generalized |

Source: Prepared for this study

According to Forney, Joo Park and Brandon (2005), image, quality, colour/style and design/beauty are some of the key elements that are important in the marketing of eco-apparel. Saricam et al. (2012) further suggested that apparel customer requirements include performance and durability, price, timeliness of flexibility, fashion, design and variety, and service. Skgkao (1994) discovered that workmanship, physiological comfort, usefulness, physical and chemical properties, suitability to individual preference and fashionability are the key elements of apparel. According to Abraham-Murali and Littrell (1995), factors like fabric and garment construction, care, value, style and service are also key factors of apparel. The importance of the factor price depends upon the level of other product attributes (Abraham-Murali & Littrell 1995). However, the apparel market is

dynamic and consumer choices keep changing through different seasons. Also, these key factors of competition do not incorporate the emerging environmental factors. The apparel industry need to expand the scope of key factors of competition and redesign their research in such a way that it will also incorporate environmental elements (Bhardwaj & Fairhurst 2010).

The apparel that is produced and distributed as environmentally friendly such as green/organic apparel, is eco-apparel (Klonsky & Tourte 1998b; Vardas 2010). Lack of design, limited information, restricted availability of products (Connell 2010) and lack of trust are some of the marketing barriers identified by previous researchers (Ottman, Stafford & Hartman 2006). However, those analyses are insufficient and did not provide an extensive list of marketing barriers specific to eco-apparel (Berchicci & Bodewes 2005; Ottman, Stafford & Hartman 2006). Some researchers believe that marketing barriers to eco-apparel can be overcome by highlighting the environmental superiority of eco-apparel (Meffert & Kirchgeorg 1998; Sonnenberg, Jacobs & Momberg 2014), while other researchers believe that eco-apparel must focus on fashion-oriented factors more than environmental superiority in order to attract more consumers (Gam 2011). First, there are very few reports defining marketing strategy for eco-apparel. Second, the available literature promotes inconsistent marketing ideas. Despite the efforts from scholars and managers in support of these products, eco-apparel is not the preferred choice for the majority of consumers (Beard 2008). A larger segment of consumers still tend to buy conventional apparel. These consumers are not ready to compromise on price and product attributes for the sake of the environment (Sonnenberg, Jacobs & Momberg 2014). There is need of a thorough analysis of marketing barriers to eco-apparel and of a marketing strategy framework to overcome those barriers.

2.4.3 Research questions

The main research question of this thesis is: 'How could the marketing barriers of eco-apparel be overcome to make eco-apparel the preferred choice for the majority of consumers?' The literature review of the major theories and approaches to barriers and marketing strategy further raised additional research questions that

will contribute to answering the main question. Table 8 below demonstrates the refined research questions and also relates the research sub-questions to the theoretical framework. The colours used in this table demonstrate the relationships between approaches, theories and sub-questions.

Table 8: Sub-research questions within theoretical framework

| Theory Category | Grouping of Like-Theories & Approaches | Sub-questions | Dominant Major Theories | Roll up of Major Theories |
|-----------------|--|--|--|----------------------------|
| Barriers | <ul style="list-style-type: none"> Key factors of competition Marketing related barriers | <ol style="list-style-type: none"> What are the key factors of competition in the apparel industry? How does eco-apparel perform across the key factors of competition in the apparel industry? | Market analysis Marketing mix | Strategic Marketing |
| Strategy | <ul style="list-style-type: none"> Strategy Canvas Four Actions Framework | <ol style="list-style-type: none"> What are the marketing barriers to eco-apparel and how can they be classified? What marketing framework could be developed to overcome the marketing barriers faced by eco-apparel? | Marketing strategy | |

Source: Developed for the purpose of this thesis

2.4.4 Conceptual model

The conceptual model developed for this research is based on the literature reviewed and on theory. The major discipline underpinning this research is strategic marketing. However, specific theories involved are marketing strategy and market analysis. The conceptual model given in Figure 7 overleaf represents the relationship between theories underpinning this research and the research questions. The overall objective of this research is to develop the market of eco-apparel by increasing its market into the mainstream apparel market. However,

there are several marketing barriers ahead. Therefore, the first step taken in this research is market analysis of eco-apparel where it will identify key factors of competition in the apparel industry and evaluate the performance of eco-apparel across those key factors using Strategy Canvas. This will give insight into the marketing barriers to eco-apparel. Once the marketing barriers have been investigated, the Four Actions Framework will be used to design a marketing strategy framework which can be used as a framework to design marketing tactics to promote eco-apparel to mainstream apparel consumers. The arrows between the two text boxes represent the direction of this research. Figure 7 below is the conceptual model of this thesis.

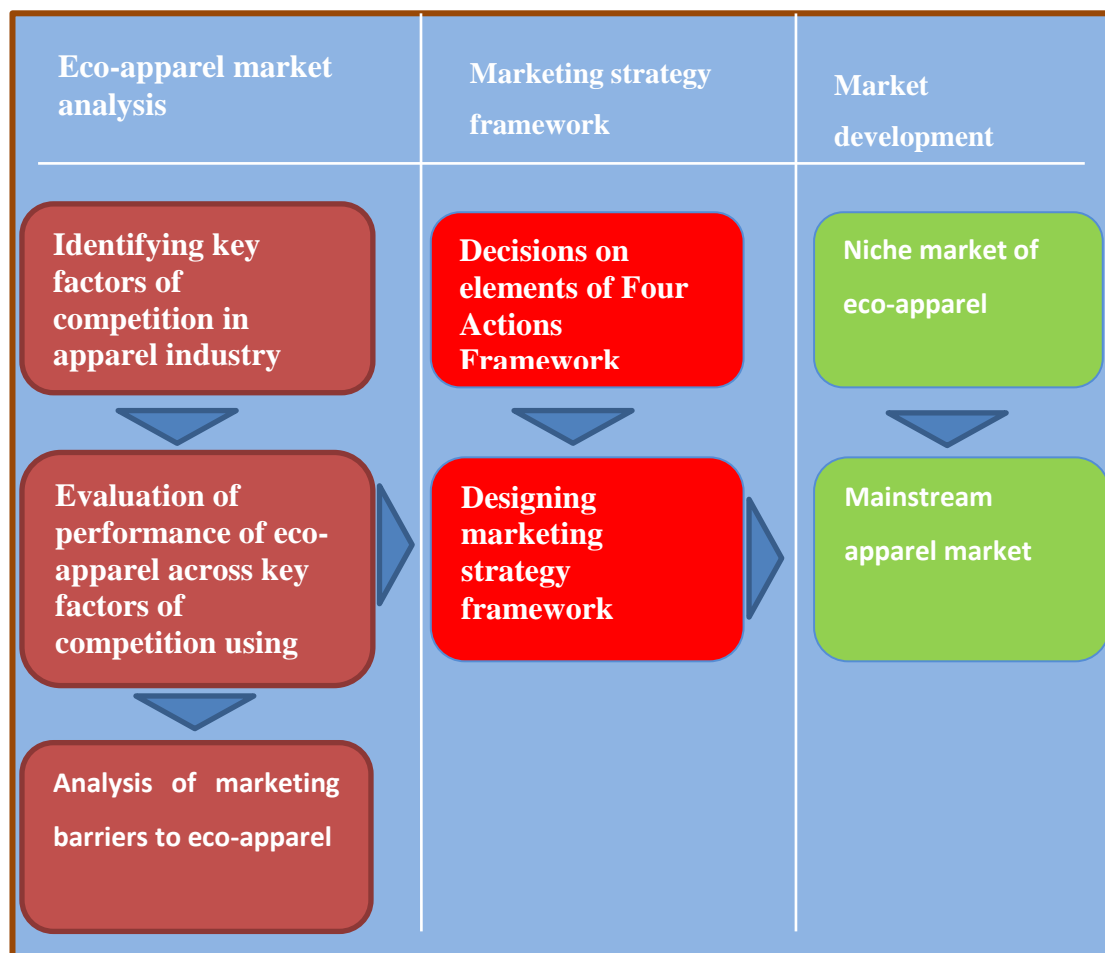


Figure 7: Conceptual model developed for this thesis

Source: Developed for the purpose of this thesis

2.5 Conclusion

This chapter reviewed different literature related to the marketing of eco-apparel. The review started with a general review of eco-apparel product characteristics followed by a review of literature related to key factors of competition in apparel industry, eco-apparel marketing barriers and marketing approaches. Further, this chapter discussed the theory of marketing strategy, which is the underpinning theory of this thesis and identified the Strategy Canvas and the Four Actions Framework as two strategic tools that can be used in answering the research questions of this thesis. Also, a conceptual model of this thesis was developed in this chapter. The following chapter will provide detail about methods used in data collection and analysis.

Chapter 3: Methodology

3.1 Introduction

Research is driven by the methods, tools and processes used to collect the data, and to analyse and disseminate the findings (LeCompte & Schensul 1999). The overall purpose of this thesis is to investigate how eco-apparel companies can overcome marketing barriers for eco-apparel products so as to subsequently help increase the market. It involves market analysis of eco-apparel and the adoption of strategic tools such as the Strategy Canvas to design a competitive marketing strategy. This chapter will predominantly discuss methods and configurations that were applied with the end goal of answering the questions proposed by this research.

This chapter commences with a justification for the research paradigm (Section 3.2). Secondary data collection is described in Section 3.3. This is then followed by primary data collection (Section 3.4). Data collection and analysis are explained (Section 3.5) and this is followed by discussion of validity issues (Section 3.6). Ethical issues in the research are then discussed (Section 3.7) and concluding statements appear at the end of this chapter (Section 3.8).

3.2 Justification of research paradigm

3.2.1 Constructivist/interpretive

A paradigm is a belief about how knowledge exists and it sets a ground for selecting different methods for doing research. 'A paradigm is a collection of logically related assumptions, concepts, or propositions that orient thinking and research' (Bogdan & Biklin 1998, p. 22). It is also referred to as the philosophical reasoning behind performing research (Cohen & Manion 1994). Paradigms are associated with a belief about the characteristics of knowledge and information, as well as the methodology used to collect information and understand how information can be validated (MacNaughton, Rolfe & Siraj 2001). Social science research projects are

designed on the basis of research paradigms (Guba & Lincoln 1994). The table below (Table 9) displays the four major research paradigms.

Table 9: Labels associated with different research paradigms

| Post positivism | Constructivist/Interpretivist | Transformative | Pragmatic |
|---|---|---|--|
| Experimental Quasi-experimental Correlational Causal comparative Quantitative Randomised control Trials | Naturalistic Phenomenological Hermeneutic Symbolic interaction Ethnographic Qualitative Participatory action research | Critical theory Neo-Marxist Feminist theories Critical race theory Freirean Participatory Emancipatory Postcolonial/Indigenous Queer theory Disability theory Action research | Mixed methods Mixed models Participatory |

Source: Adapted from Creswell (2003), Guba & Lincoln (1989), Lather (1992), and Mertens (2014)

Positivism represents the belief in objectivity. This paradigm assumes that the social world and natural world are the same (Mertens 2005). Taking this assumption into account, the causal relationship between social variables can be studied by experimentation and measurement, as in natural world research. Positivism emphasises the collection of objective data; however, such data are not sufficient to explain social phenomena. Most of the vital human responses, such as thinking and feeling, are intangible and cannot be measured.

Constructivist/Interpretivist researchers believe that a subjective approach can better understand the human experience. The corresponding constructivist paradigm assumes that knowledge is socially constructed amongst the participants of the research and should therefore be understood from the viewpoint of those participants (Schwandt 2000). The aim of this research is to interpret the marketing processes of eco-apparel through human interactions so that an effective marketing strategy can be generated. Such an approach is called constructivism

(Creswell 2003). A research paradigm puts forth a basis that can aid in choosing the right methodology, methods, literature and research design for the intended research. Table 10 has clearly tabulated methods and tools applicable to particular research paradigms. Qualitative data collection methods are the most preferred during constructivist research (Silverman 2000; Wiersma 2000); however, sometimes during complex research such as evaluation of medical intervention in patients, use of quantitative data gives a better understanding and synergistic outcome (Wisdom & Creswell 2013). The table 10 demonstrates methods and tools that can be used in different research paradigms.

Table 10: Paradigms, methods and tools

| Paradigm | Methods (primary) | Data collection tools (examples) |
|---------------------------------------|---|--|
| Positivist/ Post positivist | Quantitative methods are used predominantly, however sometimes qualitative methods also can be used | Experiments Quasi-experiments Tests Scales |
| Interpretivist/ Constructivist | Qualitative methods predominate, although quantitative methods may also be utilised. | Interviews Observations Document reviews Visual data analysis |
| Transformative | Qualitative methods with quantitative and mixed methods. | Diverse range of tools - particular need to avoid discrimination, e.g. sexism, racism, and homophobia. |
| Pragmatic | Qualitative and/or quantitative methods may be employed. Methods are matched to the specific questions and purpose of the research. | May include tools from both positivist and interpretivist paradigms, e.g. interviews, observations, and testing and experiments. |

Source: Adapted from Mackenzie and Knipe (2006), Mertens (2005)

3.2.2 Qualitative vs. quantitative

The quantitative approach uses numerical data or objective hard data as the basis for the analysis. Further, the analysis is done by means of several statistical methods and tools (Punch 2014). In a broader view, the quantitative method is distinguished by experimental investigation of social or human issues and testing of propositions having different variables. These variables are regulated by numbers and tested with statistical tools to see if the proposed theory either clarifies or predicts phenomena of interest (Gay & Airasian 2000). Qualitative research is a type of research that produces findings without using numbers or statistical

procedures (Strauss & Corbin 1998). During qualitative research, extensive data is collected over a period of time in a naturalistic setting on many variables (Gay & Airasian 2000). Qualitative research is based on the epistemological assumption that the origin, nature, methods, and limits of knowledge surrounding social phenomena are complex and interwoven and the variables cannot be separated (Creswell 2012). Quantitative methodology is carried out by identifying variables, measuring them, and using those data to confirm or question existing theories. However, use of statistical numbers and tools cannot possibly explain meanings, beliefs and experiences in the same way that the qualitative methodology is able to (Neuman 1997). Intangible aspects such as ideas, experiences, and values can be better understood and described by qualitative research. During quantitative research, a large number of responses are predetermined so that more accurate statistical data can be collected. This kind of research gives results to questions such as how many people think, feel and behave.

Whereas, qualitative research is the most appropriate to describe or understand issues on behavioural trends such as why people behave in a particular way, to ensure that all the relevant topics being researched are covered, an interview guide can be used during qualitative interviews (Gall, Gall & Borg 2003a). This guide makes interviews structured to some extent; however, it provides more flexibility so that the researcher can probe more questions, depending upon the response of the participants (Turner & Daniel 2010). Open questions are posed to the participants and the interviewer tries to understand the reasons behind the responses of the participant. This process can unravel underlying views, motivations and barriers. The reactions to particular messages, advertisements, and products can be understood better with qualitative analysis.

The aim of this thesis is to overcome the barriers to eco-apparel and increase its market. Increasing the market obviously means convincing more people to use eco-apparel. Before designing a marketing strategy to accomplish this, it is important to understand how people respond to eco-apparel and why. Qualitative research can help a researcher to get inside the minds of consumers. Qualitative methodology

assumes that the source of knowledge depends on social constructions and these social constructions are subject to change. People build different realities according to their views on society, culture, and their beliefs and values. There can be varied interpretations for one single situation or case. So, a study must essentially be able to see these understandings through the eyes of the participants involved. Qualitative research helps to find answers to questions such as 'What?', 'How?', and 'Why?' rather than 'How many?', 'How much?', or of frequency and times (Cohen, Manion & Morrison 2007; Neuman 1997; Snape & Spencer 2003). Since the questions in this research are 'What?', 'How?' and 'Why?', qualitative research is the appropriate methodology for this research.

Focus groups and in-depth interviews are the most frequently used qualitative approaches (Creswell 2012). A focus group is a small group of participants who sit together to discuss a chosen topic. The interactions between the participants are valuable elements of this approach. The focus group method is most appropriate when brainstorming is needed because several opinions are shared and gathered simultaneously and the interaction between participants serves to facilitate the information gathering process (Green, Draper & Dowler 2003). In contrast, during in-depth interviews, each participant is interviewed separately within a more intimate and comfortable environment. The interview questions could be structured, semi-structured or unstructured. However, a less structured interview is more flexible and allows the interviewee to talk openly (Patton 2002). In-depth interviews are helpful in understanding new issues in depth. Detailed information about people's thoughts and behaviour regarding a particular matter can be gathered through in-depth interviews. In-depth interviews can provide a complete picture of existing data. For example, from the review, it was found that eco-apparel is a niche market and in-depth interviews will give information about why the majority of consumers are not choosing eco-apparel (Boyce & Neale 2006). Thus, a qualitative research method with in-depth interviews would be a suitable approach for this thesis.

The review of research paradigms and methodologies above, proposes that both the chosen paradigm and the research question need to be used to figure out which types of data collection and analysis methods would be best for the proposed study. In regards to this study, the research paradigm chosen was interpretivist, and the data collection methods employed were therefore qualitative. The research involved collection of secondary data from technical reports related to apparel companies. Further, in-depth interviews have been conducted to collect primary data.

3.3 Secondary data collection

Secondary data are the data that are already collected, analysed and synthesised by other parties for their own research purposes (Frankfort-Nachmias & Nachmias 2008). These data could be readily available in reports, government statistics or any other industry-related magazine articles which can be a rich source of data for this kind of research. Secondary data can be searched easily through internet search engines and will save time and money (Ghuri & Grønhaug 2005). Further, results from secondary data can be compared with the results from other sources to increase the validity of the research (Thurmond 2001). Therefore, technical reports on conventional apparel and eco-apparel have been collected in search of answers to the questions of this research.

3.3.1 Technical Reports

Technical reports about the apparel industry and its marketing, as prepared by different companies, organisations and government, can be good sources of secondary information. Technical reports are written documents and will provide results of different research previously conducted in apparel and eco-apparel (McCaston 1998). Technical reports describe the processes and results of scientific research (Riordan & Pauley 2004). They are produced with an aim of sharing research progressions and results with other institutions, governments and researchers. They can be reports developed from completed research projects or just from an ongoing project (Hering & Hering 2010). They are sometimes even called grey literature. The data from them can also provide the necessary

background knowledge for designing an effective primary data collection strategy for this kind of research (Flowerdew & Martin 2005). The researcher will gain more insight into other aspects of eco-apparel that he or she is not looking at. Researchers can individually analyse each report to identify the key factors of competition and marketing barriers to eco-apparel. This can later be compared with the key factors of competition and marketing barriers generated from primary data and a final summary list can be prepared.

The reports prepared by government, apparel and eco-apparel companies, and non-governmental organisations were searched and studied as a part of the secondary data used in this research. The importance of government legislation and environment regulations in the marketing of eco-apparel were found in these technical reports. These technical reports contained information about apparel consumer characteristics, choices and behaviour. The technical reports also included reports about sales, marketing, technology, or different facets of eco-apparel. The table below contains a list of reports studied in this research.

Table 11: Technical reports studied in this research

| S.N | Title of technical report | Institution |
|-----|--|---|
| 1. | DEFRA 2009, <i>Sustainable Clothing Roadmap, Industry Initiative Update - Part 1</i> , by GOV.UK, Government of UK. | Department for Environment, Food and Rural Affairs, UK Government |
| 2. | Pay, E 2009, <i>The market for organic and fair-trade cotton fibre and cotton fibre products. Study prepared in the framework of FAO project GCP, RAF/404/GER</i> . Rome (Italy), Food and Agriculture Organization (FAO) of the United Nations.[Links]. | Food and Agriculture Organisation |
| 3. | Ethical Fashion Forum 2011, <i>THE MARKET FOR ETHICAL AND SUSTAINABLE FASHION PRODUCTS</i> , Ethical Fashion Forum, UK. | Ethical Fashion Forum |
| 4. | Ecochic 2014, <i>The Ecochic Design Award Fashion and the Environment</i> , ECOCHIC. | Ecochic |
| 5. | Ecochic 2013, <i>The EcoChic Design Award, Marketing Sustainable Fashion</i> , Ecochic. | Ecochic |
| 6. | Retail forum for Sustainability 2013, <i>Sustainability of textiles</i> , European Commission, EU | European Commission |
| 7. | Martin, D & Economy, I 2013, 'Creating Sustainable Apparel Value Chains', <i>Impact Economy</i> , pp. 1-41. | Impact Economy, Switzerland |
| 8. | Fisher, T, Cooper, T, Woodward, S, Hiller, A & Goworek, H 2008, 'Public understanding of sustainable clothing: a report to the Department for Environment, | Department for Environment, Food and Rural Affairs, UK Government |

| | | |
|-----|--|---|
| | Food and Rural Affairs', Defra, London, available at: http://randd.defra.gov.uk/Default.aspx . | |
| 9. | Deloitte 2013, <i>Fashioning Sustainability China Water Risk</i> . | China Water Risk, Non-profit organisation |
| 10. | America BSR 2012, 'Sustainable Fashion Design: Oxymoron No More?' | Business for Social Responsibility |
| 11. | Eder-Hansen, J 2012, 'The nice consumer', <i>Research summary and discussion paper: Toward framework for sustainable fashion consumption in the EU. Danish Fashion Institute</i> . | Danish Fashion Institute |
| 12. | Lipson, E 2008, <i>International market for sustainable apparel</i> , Tatjana Meerman, Packaged Facts. | Packaged Facts, Market research company |

However, secondary data alone cannot be used to answer the research questions proposed by this research. The research from which the report has been made, may have different objectives that are completely different from this research and the data could have been collected using different methodology (Denscombe 2000). The technical reports might be old and may not be able to justify the present context of the eco-apparel market. Secondary data is useful for understanding the general condition or status of eco-apparel products, but it may not sufficiently answer all research questions. There might also be conflicting sources offering conflicting information which can complicate the understanding of the situation. Therefore, primary data will also be collected in this research through in-depth interviews with consumers and managers.

3.4 Primary data collection

The first hand data collected for particular research that is being conducted is primary data (Hox & Boeije 2005). It is also known as field research. Experiment, social survey, qualitative interview and observation are some of the ways of collecting primary data (Hox & Boeije 2005). Qualitative interviews can give more insight into consumers' opinions about eco-apparel through questions such as: 'How do consumers buy apparel?' and 'Why do they or do they not buy eco-apparel?' Qualitative interviews are flexible and allow participants to express their views, experiences and opinions in detail. Quantitative surveys may be able to reveal how many items of eco-apparel one consumer buys, but they cannot explore the reasons or motivations behind such behaviour. Qualitative interviewing is one

method in which respondents are given time to speak about their preferences, reasons and experiences without having to answer a rigid set of questions. Therefore, the primary data for this research was collected through qualitative interviews. Primary data, in this case, provided the researcher with the most up to date information regarding the participants' thoughts and views on eco-apparel. A general interview guide with topics and area of interview was used, and could be adjusted as the interview progressed.

3.4.1 In-depth interview

Qualitative research examines the reasons behind certain phenomena or human activities (Malterud 2001). It involves analysis of how people learn about something and build their perceptions or beliefs about themselves and other people or factors (Merriam 2009). One of the popular methods of qualitative research is performing in-depth interviews, in which the respondents are allowed to freely express their views. There are three ways of conducting an interview: informal conversation, interview guide approach, standardised open-ended approach (Patton 2002). Qualitative in-depth interviews are taken individually and are intensive compared to other interview processes. The interviewer is able to ask interviewees about their experiences and expectations in relation to eco-apparel, as well as their concerns regarding any marketing processes or activities of eco-apparel companies. The interviewer can probe interviewees as the interview progresses, and thus the in-depth interviews will give much more detailed knowledge and information about eco-apparel than any other objective data collection method. The respondents for this research were interviewed in a free and relaxed environment so that they could feel more comfortable in having conversations with the interviewer, compared to simply filling out a survey. The number of interviews depended upon data saturation. Once, the data collection reached a point where no new information was coming from interview, no more interviews were undertaken (Bowen 2008). The duration of interviews was up to 40 minutes. The interviewees were purposively selected from among apparel managers and consumers.

3.4.1.1 Selecting participants

In qualitative research, selection of the subjects is very important. It is vital to select participants who can give useful answers to the research questions and also enhance the understanding of the subject which is being researched (Creswell 2003). For this reason, the selection of appropriate participants is a crucial step in this research study. The main basis for selection of participants mostly depends upon the research questions, theoretical perspectives and the evidence needed for the study. The selected subjects must be able to provide information about the important features and contexts of the research being studied. The objective of this research was to identify the barriers to eco-apparel. These barriers could be challenges, weaknesses, threats or any other inefficiencies of eco-apparel. There are two types of participants who can give information about those barriers – apparel managers and apparel consumers. Interviewing apparel consumers could potentially reveal the reasons why they were not buying eco-apparel. Similarly, interviewing apparel managers could give information about why they have not been able to sell eco-apparel or attract more consumers to buy eco-apparel. A thorough search for eco-apparel companies within the Brisbane region was done through online search engines such as Google. Key words such as ‘Eco-apparel companies in Brisbane’ were entered. Google ranks websites using a complex algorithm and the most relevant and useful websites are displayed on the first page. So, the companies appearing on the first few pages were given more priority and consecutively the second, third, fourth and so on pages were then prioritised. The interviewer visited the website of each company identified from the search results. The eco-apparel companies were distinguished on the basis of types of apparel sold. Companies selling organic clothing, hemp clothing, bamboo clothing and second-hand clothing were taken as eco-apparel. A list of 33 companies, respective managers and their contact details was prepared. The interviewer sent emails to each manager requesting participation in the research interviews. Twelve managers ended up being interviewed. A copy of the consent form and information sheet was also sent with the same email. Also, a follow up call was made by telephone to confirm the participation of those contacted, data, time and interview

site. The recruitment of consumers was done by snowballing, individual contact or random approach to universities and market places. In total 20 consumers were requested to participate in the interview process and 12 consumers ended up being interviewed. Warren (2002) has recommended that a qualitative study should contain a minimum of 20-30 interviews to be publishable. The interviewer did not find significantly new information in the last couple of interviews. Also, generally 20-30 interviews are considered sufficient for a qualitative study (Warren 2002) as well as for a Research Master's degree (Perry 1998a).

3.4.1.2 Interview setting and participants

The researcher needs to consider different aspects of different interview contexts such as interview sites. Interview sites are generally decided either by negotiation between interviewer and participant or fixed by either interviewer or participant. Restaurants, private homes (Helavirta 2007), schools, and community centres can be appropriate locations for interviews (Krueger & Casey 2000). Some respondents may not be comfortable in a public environment like hospitals or malls, as they may find it awkward to give an interview in the sight of outsiders (Eggenberger & Nelms 2007). Interviews that are taken at participants' homes are more informal in comparison to workplaces and the participants are more likely to feel comfortable in answering the researcher's questions (Rautio 2013). However, the most important matter of consideration during an interview is participants' convenience and comfort. The interview locations should be quiet and convenient. Participants feel empowered if they are given a chance to select or decide upon interview sites; however, the participants must be made aware of what they will be asked. Participants who are given the chance to select the interview site may further feel free to answer research questions (Elwood & Martin 2000). Thus, in this research, the interviewer asked participants to decide on an interview place; however, in instances where participants could not decide on a place, the researcher suggested some potential sites. Some managers of apparel companies were not able to give face-to-face interviews due to their busy schedules or the company was physically located in a remote place. In such cases, the interviews were taken over the phone.

The benefit of telephone interviews is that respondents can be accessed easily. Also, the respondent and interviewer can both feel more comfortable because they are in their personal setting (Opdenakker 2006). Moreover, body language observation was not a key part in this research study as the study was about investigating retail managers' views regarding eco-apparel. Thus, the use of phone interviews did not affect the quality of the data collection.

3.4.1.3 Instrumentation

The main aim or objective of an in-depth interview was to obtain extensive information from interviewed participants. There are three ways of doing an in-depth interview: informal method, structured method and interview guide approach (Patton 2002). Informal interviews do not have any predetermined questions. Researchers can ask any questions during the interview, depending upon the responses of the participants. There is a high chance of deviation during such interviews (Creswell 2007). On the other hand, structured interviews have a predetermined set of questions to be asked. There is less chances of deviation; however, due to the rigid nature of the method, the researcher may not be able to explore information lying deep within the interviewee (Given 2008). The interview guide approach is a combination of flexible unstructured and open-ended interview questions, coupled with an interview direction and general agenda (Given 2008). The interview guide approach was chosen by the interviewer in this research. The interview guide was not a list of questions, rather a guide to a dynamic conversation. With the use of the interview guide, the interviewer was able to focus on the participants and their responses, rather than on the interview questions. The interview guide helped the interviewer to keep the interview going in the right direction and at the same time gave a high degree of freedom and adaptability to the interviewee (Gall, Gall & Borg 2003b). The interview guide approach covering all research questions, was used during the interviews for this research study. The interviewer used separate interview guides for consumers and managers. The interview guide started with introductory remarks followed by the asking of respondents' opinions about eco-apparel. The researcher identified three general

topics for the interviews: marketing barriers to eco-apparel, factors of competition in the apparel industry, and marketing strategy for eco-apparel. Each topic had two or three sub-topics.

3.4.2 Pilot interviews

The primary data for this research was collected through qualitative interviews. Thus it was very important to make sure that the interview guide or interview questions asked were appropriately designed. A pilot study helps in doing a pre-test of the research instrument being used in qualitative research (van Teijlingen & Hundley 2001). This helps in identifying any problems in the instrument being used for the research purpose. It is actually a process to confirm the appropriateness of the instrument and to identify possible changes or adjustments needed to the interview questions in the instrument (Perry 1998a). Therefore, at first phase, one participant was interviewed from each case, one manager and one consumer, as a pilot interview. These interviews enabled the researcher to determine whether the interviewer was pursuing a relevant line of enquiry. However, the pilot interviews demonstrated that the interviewer was asking relevant questions and that the respondents were giving critical information closer to the research questions. Thereafter, these two pilot interviews were incorporated into the main study.

3.5 Data processing and analysis

The qualitative data in this research was subjective and consisted of information in the form of words rather than numbers (Given 2008). The researcher must interpret the words and their relations to understand a context. A systematic approach is thus necessary to analyse qualitative data. However, there are several ways of qualitative data analysis such as constant comparison analysis, content analysis, domain analysis, taxonomic analysis, componential analysis, conversational analysis, discourse analysis, secondary analysis, membership categorization analysis, narrative analysis, qualitative comparative analysis, and semiotics (Leech & JO 2008). In addition, thematic analysis is another way of analysing qualitative data (Thomas & Harden 2008). It is a 'method for identifying, analysing and reporting themes' (Braun & Clarke 2006, p.79). It is independent of

theory and epistemology and thus can be applied across different theories of knowledge (Braun & Clarke 2006). Thus it is a very flexible way of analysing qualitative data. It further delivers answers to various aspects of research questions. Thematic analysis has been proved successful in preserving the explicit and transparent relations between the conclusions of the research and texts within the primary data, which is an important aspect of systematic analysis of data (Thomas & Harden 2008). A thematic and a content analysis method were both used in this research. Thematic analysis was used to search for and identify common texts or contexts across entire interview transcripts and reports (DeSantis & Ugarriza 2000). Thematic analysis helped in categorising the data. During thematic analysis, the text data from different sources were sorted into relevant categories or themes. Thus the interview data and reports were made more systematic and manageable. Patterns and themes were developed as the thematic analysis progressed. A qualitative data analysis software NVivo was used to do the coding of data. Content analysis was further used to interpret the meaning behind the coded text or themes and relations between themes. Content analysis is useful in analysing how interview participants responded—such as what they said and with what effect (Bloor & Wood 2006); and it also helps in quantifying the qualitative data (Grbich 2012). Thus, content analysis was used to examine how much importance consumers paid to each key factor of competition and how eco-apparel companies were performing across these key factors of competition.

3.5.1 Data transcription

The primary data in this research were collected through in-depth interviews. The interviews were voice recorded using a digital voice recorder VN-713PC manufactured by Olympus Imaging Corporation. The interview recordings must be transcribed into written text for the purpose of analysis (Given 2008). All interview recordings in this research were transcribed using a professional transcribing service. Once the transcripts were completed, the researcher further compared them with the relevant audio recordings to rectify any errors. The comparison was

done by listening to the interview audio tapes and reading the transcribed reports simultaneously.

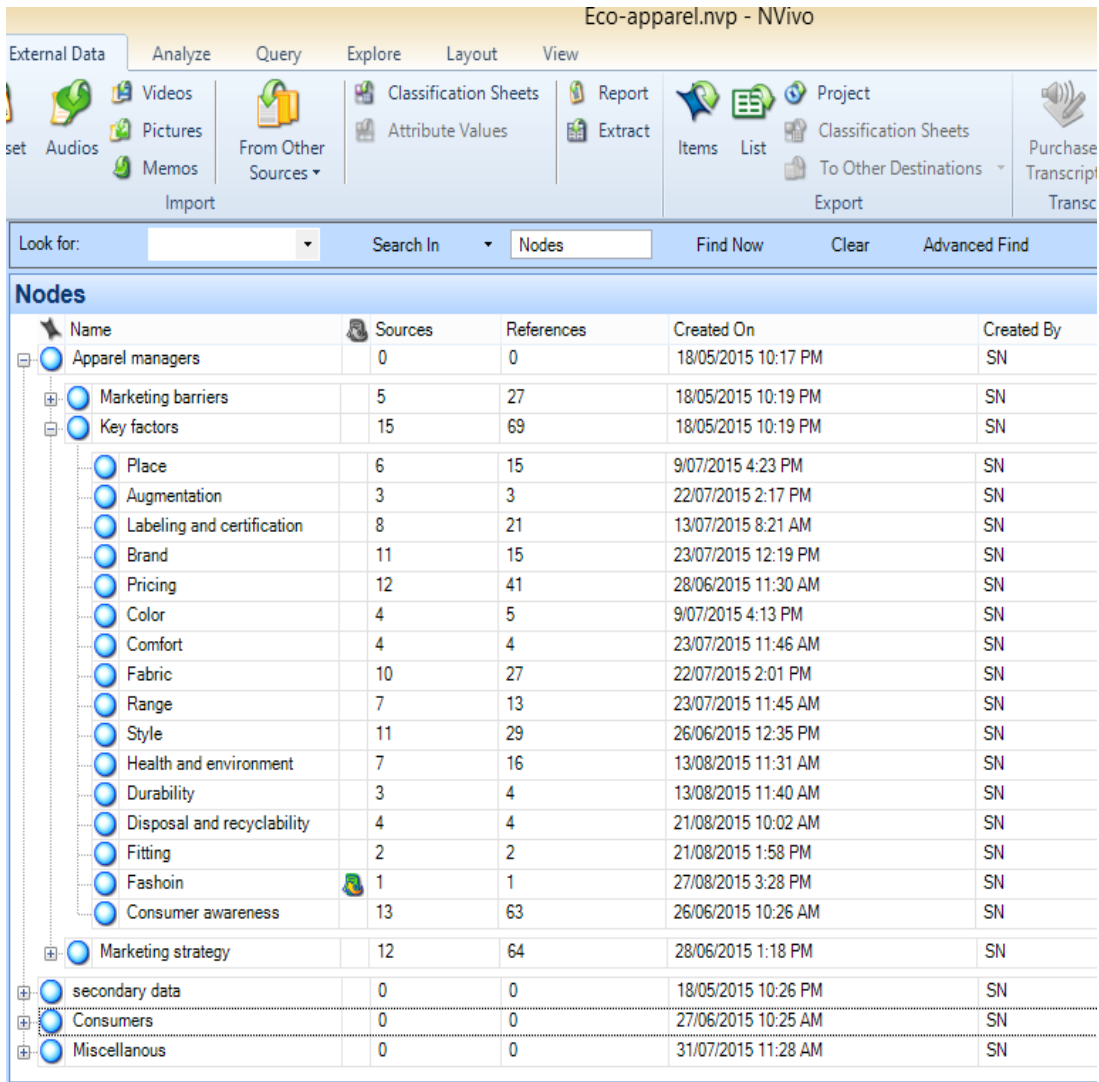
3.5.2 Data analysis

Data analysis software, NVivo, was used to do the categorisation of data. NVivo is software that analyses qualitative data. It can help organise and analyse interviews, notes, secondary sources, image files, audios and videos. The researcher read and re-read the technical reports, interview transcripts and listened to the interview recordings to understand the data thoroughly. As soon as new information or themes relevant to research questions emerged, the researcher coded that new information under a new node. In this way, all the textual data were read and all the meaningful texts and themes were coded under relevant nodes. At first, these nodes were very descriptive and contained a long phrase in their names. After repetitive reading and analysis, the nodes were more clearly defined and named. The nodes were later organised into a hierarchy. Each node was later put under sub-themes: marketing barriers, marketing strategy and key factors of competition. As shown in Figure 8 & 9, the overall nodes and sub-themes were classified under parent themes: 'Apparel managers', 'Secondary data' and 'Consumers'. The parent themes were designed on the basis of sources of data. Sub-themes generated from managers' interviews were grouped under the heading 'Apparel managers' and similarly, sub-themes generated from consumers' interviews were grouped under the heading 'Consumers'; sub-themes from technical reports were grouped under 'Secondary data'. Any new theme which was important but not relevant to the research questions was kept under the heading 'Miscellaneous'. Once the themes were sorted, the researcher further interpreted the meanings of themes and relations between themes and how they were relevant to the research questions, using the content analysis method. The frequency of occurrence of certain themes, and adjectives used in the text was analysed to derive intensity of expression in the coded text. Thus, the researcher derived answers to each research question proposed by this research.

The screenshot shows a software interface with a menu bar (External Data, Analyze, Query, Explore, Layout, View) and a toolbar with various icons. Below the toolbar is a search bar with 'Look for:' and 'Search In' set to 'Nodes'. The main area displays a table titled 'Nodes' with the following data:

| Name | Sources | References | Created On |
|--------------------|---------|------------|---------------------|
| Apparel managers | 0 | 0 | 18/05/2015 10:17 PM |
| Marketing barriers | 5 | 27 | 18/05/2015 10:19 PM |
| Key factors | 15 | 69 | 18/05/2015 10:19 PM |
| Marketing strategy | 12 | 64 | 28/06/2015 1:18 PM |
| secondary data | 0 | 0 | 18/05/2015 10:26 PM |
| marketing barriers | 1 | 1 | 18/05/2015 10:26 PM |
| Key factors | 2 | 2 | 18/05/2015 10:26 PM |
| Marketing strategy | 2 | 3 | 30/07/2015 2:48 PM |
| Consumers | 0 | 0 | 27/06/2015 10:25 AM |
| Marketing | 5 | 15 | 29/06/2015 10:09 PM |
| Key factors | 5 | 11 | 29/06/2015 10:11 PM |
| Marketing barriers | 0 | 0 | 27/07/2015 4:45 PM |
| Miscellaneous | 0 | 0 | 31/07/2015 11:28 AM |

Figure 8: Snapshot of nodes (a)



| Name | Sources | References | Created On | Created By |
|----------------------------|---------|------------|---------------------|------------|
| Apparel managers | 0 | 0 | 18/05/2015 10:17 PM | SN |
| Marketing barriers | 5 | 27 | 18/05/2015 10:19 PM | SN |
| Key factors | 15 | 69 | 18/05/2015 10:19 PM | SN |
| Place | 6 | 15 | 9/07/2015 4:23 PM | SN |
| Augmentation | 3 | 3 | 22/07/2015 2:17 PM | SN |
| Labeling and certification | 8 | 21 | 13/07/2015 8:21 AM | SN |
| Brand | 11 | 15 | 23/07/2015 12:19 PM | SN |
| Pricing | 12 | 41 | 28/06/2015 11:30 AM | SN |
| Color | 4 | 5 | 9/07/2015 4:13 PM | SN |
| Comfort | 4 | 4 | 23/07/2015 11:46 AM | SN |
| Fabric | 10 | 27 | 22/07/2015 2:01 PM | SN |
| Range | 7 | 13 | 23/07/2015 11:45 AM | SN |
| Style | 11 | 29 | 26/06/2015 12:35 PM | SN |
| Health and environment | 7 | 16 | 13/08/2015 11:31 AM | SN |
| Durability | 3 | 4 | 13/08/2015 11:40 AM | SN |
| Disposal and recyclability | 4 | 4 | 21/08/2015 10:02 AM | SN |
| Fitting | 2 | 2 | 21/08/2015 1:58 PM | SN |
| Fashion | 1 | 1 | 27/08/2015 3:28 PM | SN |
| Consumer awareness | 13 | 63 | 26/06/2015 10:26 AM | SN |
| Marketing strategy | 12 | 64 | 28/06/2015 1:18 PM | SN |
| secondary data | 0 | 0 | 18/05/2015 10:26 PM | SN |
| Consumers | 0 | 0 | 27/06/2015 10:25 AM | SN |
| Miscellaneous | 0 | 0 | 31/07/2015 11:28 AM | SN |

Figure 9: Snapshot of nodes (b)

3.6 Validity

Validity refers to the trustworthiness or conformability of the research (Davies & Dodd 2002). One of the methods of validating qualitative research is 'member check' (Hammersley & Atkinson 1995). In this process, research participants are allowed to voice their opinions regarding the data collected or interview transcripts. The idea is to ask participants if the researcher has correctly represented their words and voices. Researchers also share their interview transcripts with the interviewee and ask them to comment on them and even make changes if they want to. Moreover, participants are given opportunities to speak about the data analysis and conclusions that have been derived by the researcher. In this process, participants might be asked for a second follow-up interview to fix and adjust the

changes that took place throughout the research process. The assumption lying behind member checking is that there is a fixed truth and it can be confirmed by the participants. On the other hand, the interpretive approach holds the belief that the truth cannot be objective (Angen 2000; Morse 1994; Sandelowski 1993). Once the data is collected, revisiting the participants can be time consuming for the researcher. Also, it may create confusion because the views of the participants may change regarding any issue due to new experiences and lapse of time in between the two points of contact. The context, moods and emotions of the participants may vary during different visits (Morse 1994). Participants may feel regret about something they shared in the earlier interview and may want to remove this from the data. Another method to make qualitative research valid is constant comparison (Creswell 2007). Under this method, the categories emerging during analysis must be continually checked and re-checked against raw data. This helps in producing more relevant categories and codes during data analysis. However, there is no clear technique for doing so. The process involves comparing each piece of data with every other piece of relevant data, which can become quite impractical with large amounts of data. The other way to increase the validity of research is by data triangulation (Patton 2002). Data triangulation is a method of comparing data from two or more sources under the same research method (Miles & Huberman 1994). Triangulation of data involves the collection of data from diverse participants and compares their view points. The research for this project used multiple sources of data. The interview data were collected from two different categories of participants: one was the apparel managers and other was the apparel consumers. In addition, it used technical reports as secondary sources of data. Data triangulation was seen as a good match and thus was applied in this study. In this process, the data were sorted as per the sources as shown in Figure 1: 'Apparel managers', 'Consumers' and 'Secondary data'. As the analysis progressed, most of the themes were similar among the three sources. Any theme that is unique to one source and not common to the other two sources, was also incorporated in the summary of themes. This means the themes were confirmed from three different sources and thus it made the findings of this research more valid.

3.7 Ethical considerations

All research must be conducted in accordance with ethical standards (Udo-Akang 2013). In general, there are five major ethical issues that must be addressed by social research. They are: informed consent, privacy and confidentiality, harm, research merit and integrity (National Health Medical Research Council 2007). In order to ensure the ethical standards, this research followed the ethical procedures mentioned and explained below.

3.7.1 Research merit and integrity

A meritorious research study must be justifiable with regards to its benefits, such as its theoretical and practical contribution to the field (Pieper & Thomson 2011). It must use appropriate research designs and methodologies based on a thorough review of literature. However, it also considers the fact that novel research areas may have less literature available to be reviewed. This research aimed at designing a marketing strategy framework to increase the market share of eco-apparel, which will eventually reduce the use of conventional apparel and lessen the negative environmental impact of use of such apparel. From a theoretical perspective, this research will contribute to a better understanding of barriers to eco-apparel. The research questions and methodology have been developed after a literature review and were supervised by two experienced and qualified faculty members from the Faculty of Business, Education, Law and Arts at the University of Southern Queensland. The overall research was designed in such a way that it would not compromise respect for the research participants at any point or in any process. Participants were properly informed and were not forced to answer any question. The interview recordings have been kept safely. Also, this research was guided by two experienced and qualified supervisors.

3.7.2 Informed consent

In any human participation in research, the interviewer must obtain a voluntary agreement from interview participants before conducting the interview (Corti, Day & Backhouse 2000; National Health Medical Research Council 2007). The

interviewer must respect the individual autonomy and let the participants decide themselves if they are willing to participate in the interview. Thus, participants were requested to sign a consent form willingly. The consent form was designed to let the participants know about their rights, the purpose of the interview and the potential risks or benefits associated with participation (Vollmann & Winau 1996). Therefore, a signed consent form was obtained before interview. Separate consent forms were designed for managers and consumers. The consent form contained research details, contact details of the research team, a statement of consent, and signatories. In order to inform participants about the intention and purpose of the research and how the results of the research might impact, a copy of the participant information sheet was sent to participants along with the consent form. Participants were informed about the storage and usage of data in the long term. It contained information about the purpose of this research, as well as expected benefits of and risks involved in participation in this research. Also, issues regarding privacy and confidentiality were highlighted in this information sheet.

3.7.3 Harm

Another ethical issue addressed was the risks and benefits associated with participation in this research. According to this principle, researchers are expected to provide the participants with an outline of the risks and benefits involved in the study (Cheshire 2009). The information about risks and benefits should be outlined in this information sheet. As mentioned in the earlier section, a separate information sheet was made available to participants. It included sections where the risks and benefits of participating in this research were outlined. However, there was minimal risk associated with participation in this project. The risks included spending up to an hour in an interview. The interviewer tried to schedule the interview at a time that was most suitable and comfortable to the participants so that they would not have to compromise any of their important work. Further, the information sheet clearly mentioned that the results of this research would benefit managers of eco-apparel companies in designing an effective marketing strategy for their products. It also mentioned that results of this research will help with increasing the market of eco-apparel, which will subsequently reduce the

negative impact of clothing on the natural environment and will indirectly benefit consumers.

3.7.4 Privacy and confidentiality

The principle behind this requirement is that neither the information shared by the participants nor their identity can be revealed (National Health Medical Research Council 2007). In order to maintain privacy and confidentiality, the research data collected in this research could be used solely for this research. Only the University of Southern Queensland and the research team had access to the research data. All the data had to be stored securely as per the data management policy of the University of Southern Queensland. This was clearly explained to the participants through the participant information sheet.

3.8 Conclusion

This chapter analysed the overall methods employed in this thesis. The chapter started with the justification of the research paradigm, where qualitative and quantitative research methods were compared. This research being an interpretive research, a qualitative methodology was confirmed as more useful than a quantitative one. Appropriate data collection methods were then analysed for this research. Data collection was divided into two stages: first, secondary data collection; and second, primary data collection. The researcher justified the sources of secondary data collection. Official documents, reports and websites formed the main sources of secondary data for this research. Similarly, in-depth interviews were found to be more appropriate for collecting information regarding the research questions. This chapter provided details about how the participants were selected, what instruments were used to collect data and how the data were analysed. The final section of this chapter dealt with how this research would maintain research ethics and integrity throughout. Some of the approaches adopted were that the researcher would use participant information sheets and consent forms to obtain informed voluntary consent from research participants. Similarly, the researcher tried to address all important ethical issues as per the theory and the National Statement on Ethical Conduct in Human Research. The

following chapter will show how the data were analysed and will also provide the findings of the data analysis.

Chapter 4: Findings and analysis

4.1 Introduction

This chapter deals with each of the research questions individually. For each research question, relevant themes and sub-themes were designed, and this helped in answering the questions. There are three main themes, which are derived from the research questions, while the sub-themes are derived from the data. Each theme and sub-theme is described, followed by analyses of relationships between the themes. The overall analysis of themes is also categorised according to the types of data and methods of collection. Thus, first it was classified into interviews and reports, and interviews then further sub-classified into managers' and consumers' interviews. The questions designed for this research are:

1. What are the key factors of competition in the apparel industry?
2. How does eco-apparel perform across the key factors of competition in the apparel industry?
3. What are the marketing barriers to eco-apparel and how can they be classified?
4. What marketing framework could be developed to overcome the marketing barriers faced by eco-apparel?

Thus the main themes are marketing barriers, key factors of competition and marketing strategy. They are described and analysed in the following section along with the examples of coded text.

4.2 Key factors of competition in the apparel industry

RQ1: What are the key factors of competition in the apparel industry?

The theme 'key factors' was derived from the research question, 'What are the key factors of competition in the apparel industry?' and was described as the key factors that consumers take into account while making apparel purchase decisions. They are the factors in which conventional and eco-apparel companies are

investing. The interview transcripts and reports were thoroughly read and the relevant text was coded under this theme. Respondents were asked different questions related to their apparel purchasing habits and experiences. The questions were generally related to the factors that would affect their overall apparel buying process and apparel choices.

The structure or framing of questions varies due to the different respondents, however the context remained the same and the aim was always to identify the key factors that played a major role in the marketing of apparel.

The research involved two sources of data: qualitative interview and secondary reports, and each source was thoroughly analysed to identify relevant key factors. The following section provides analysis and discussion of those key factors. From the interviews conducted with managers and consumers, 16 key factors were deduced in each case. Similarly, 15 key factors were generated from the technical reports. From the managers, consumers and reports, it was found that augmentation, branding, comfort, fabric and feel, labelling and certification, pricing, place and distribution, range, style, health and environment, durability, disposability and recyclability, fitting, fashionableness and trendiness were the key factors that were common in all three different sources of information. These could play an important role in the success of eco-apparel. Colour and consumer awareness were common key factors suggested by managers and consumers. Additionally, speed was a factor generated from technical reports only. Speed generally referred to frequency of new styles and therefore, it was merged with fashion and style.

Table 11 overleaf illustrates the initial key factors and final key factors. The key factors with red font are the initial key factors derived from the interviews with managers, consumers and reports. At first, key factors common in all three sources were listed. Then in the same list, factors common to at least two sources were added. Finally, there were some factors that were unique to a source and did not resemble factors of any other source, which were added to the same list. Thus a

final list of key factors was prepared. The key factors in blue font constitute the summary of overall key factors identified from the analysis of data collected for this research.

Table 12: Key factors of competition in the apparel industry

| Key factors according to apparel managers | Key factors according to apparel consumers | Key factors according to technical reports | Summary of key factors |
|---|--|---|---|
| <ol style="list-style-type: none"> 1. Augmentation 2. Branding 3. Colour 4. Comfort 5. Fabric and feel 6. Labelling and certification 7. Pricing 8. Place and distribution 9. Range 10. Style 11. Health and environment 12. Durability 13. Disposability and recyclability 14. Fitting 15. Fashionableness and trendiness 16. Consumer awareness | <ol style="list-style-type: none"> 1. Augmentation 2. Branding 3. Colour 4. Comfort 5. Durability 6. Fashionable and style 7. Fabric and feel 8. Fitting 9. Health and environment 10. Labelling and certification 11. Pricing 12. Place and distribution 13. Range 14. Disposability and recyclability 15. Fair wage 16. Consumer awareness | <ol style="list-style-type: none"> 1. Branding 2. Comfort 3. Durability 4. Fashionable and trendiness 5. Fitting 6. Pricing 7. Place 8. Range 9. Speed 10. Style 11. Disposability and recyclability 12. Fabric and feel 13. Design 14. Health and environment 15. Labelling | <ol style="list-style-type: none"> 1. Colour 2. Comfort 3. Augmented features 4. Place and distribution 5. Branding 6. Durability 7. Fair wage 8. Fabric 9. Fashion and style 10. Health and environment friendliness 11. Label with certification 12. Pricing 13. Range 14. Disposability and recyclability 15. Fitting 16. Consumer awareness |

Source: Prepared for this study

4.2.1 Colour

From the responses of consumers and managers, it was found that colour is one of the major factors that consumers take into account when buying apparel. Colour is valued by consumers of any age and any gender. People want to wear something that suits or complements them. A female consumer said

Certainly colour comes into it. I'm a female. Colour always comes into it, whether it suits me or not. Certainly the colour and how it's going to fit and how it's going to look on me. (Consumer Interview 10)

Colour is one of the prime factors that reflect one's character and personality. Thus, consumers always look at a different variety of colours when buying apparel before they choose a particular colour. They find it refreshing to wear apparel of different colours. People are really concerned about how they look once they are wearing or carrying any apparel. Consumers are likely to consider colour before environmental factors when buying apparel. Here is the response of one of the consumers.

That's true too. I don't even think they're thinking of that in terms of it's more of a hobby. People find that therapeutic. They can choose the colours that they want and that sort of thing. I don't think they think about the environment when they're doing that. That's just my feeling about why they do things like that. (Consumer Interview 10)

So, colour can be rated as a factor that is 'Much Higher' than other factors. Further analysis was done to see how eco-apparel companies are investing in the factor 'colour'. One of the consumers was trying to recall her experience of eco-apparel. She said:

I might have been up at [Melulaba 00:05:25] once and there was a, not the brand that you're talking about, but they were 100%, are they bamboo? Very limited with colours and so forth, they were all nature colours, the browns and the whites and that sort of thing. What did you say again? This is called Organic what? (Consumer Interview 10)

Eco-apparel products use only natural dyes, which are very light. The colour may be washed away if eco-apparel is washed in machines using washing powders or soap

(Gulrajani 2001; Mohanty, Misra & Hinrichsen 2000). One of the managers shared her view, saying that, 'If I do take that home and have to hand wash it or ... The dye comes out of it, I'm not going to be happy because yes, eco is very important. Ethically made stuff is very important, but it doesn't necessarily mean it has to be more work' (Manager Interview 1). There are very limited colours available in eco-apparel. The colours currently available are dull and unattractive.

You cannot have too many colours, because we cannot use dyes. We have to use only eco-friendly dyes that are certified by GOTS, Global Organic Textiles Standard. And, also you have to use natural colour, right? And, when you do organic, they're not very bright. And something I will say, we don't have pure white, in organics. There is no pure white. Our white is called Eco-white. They call it Eco-white, because it's oxygen bleached. (Manager Interview 3)

Eco-apparel performing much lower than non eco-apparel in terms of colour and its variety in colour, which is generally because of lack of sufficient dyes.

4.2.2 Comfort

The theme 'comfort' means how comfortable apparel is. People buy apparel for different reasons. For example, it can be for the purpose of work, sports, recreation, special occasions and so on. When they are jogging or doing some yoga, consumers prefer special yoga apparel which is appropriate for yoga and exercise. Consumers prefer to buy thin and light apparel during hot weather and warm clothes during cold weather (De Carli et al. 2007). The apparel bought for hot weather must let the skin breathe and dry out sweat. It should keep the body cool. Apparel for cold weather must be able to keep the heat trapped. Apparel must function according to the needs of consumers. One of the consumers said she would buy 100% cotton when she is in tropical or sub-tropical areas because she would be 'looking for being comfortable and cool' (Consumer Interview 10) and during winter, 'winter wool jackets and things like that' (Consumer Interview 10). People would require more comfortable apparel when they were wearing it for

daily purposes. They prefer more free and comfortable shirts or t-shirts. Below is what a consumer said during an interview.

It has to be very comfortable; I don't like tight hugging clothes. If I'm purchasing t-shirts or shirts, I make sure that it's a cotton shirt because they're very light, comfortable, unlike synthetic that's there in the market these days, you'll go and you'll come across so many synthetic-quality clothes. They look flashy, but they certainly are not very comfortable to put on. Comfort is one of the priorities. (Consumer Interview 6)

In addition, if it is something that is worn closer to the body; people would specially look for comfortable apparel. For example, when they are buying inner garments, they prefer comfort. But when they are going out to a party or gathering where they want themselves to look different and more attractive, they would give more priority to other factors such as style, colour and design of apparel. Below is a view expressed by one of the consumers:

It depends what I'm using it for. If it's something that I'd wear out. Like, going out, stuff like that. I might just go for something that looks really nice, but if it's something like, you know, track pants or a hoodie or something, then I'll just go for something that's really comfy. (Consumer Interview 1)

It seems that consumers value comfort most of the time; however, there are instances where they would not mind wearing uncomfortable apparel if they needed to look stylish and flashy. Thus, comfortability is taken as a 'somewhat higher' key factor by consumers.

Consumer 6 said that conventional apparel is flashy and stylish, however not always comfortable. The ones using synthetic fibres are less comfortable compared to cotton and organic cotton apparel. Consumer responses in regards to the comfort of eco-apparel included: '...quality is wonderful...so soft... they're soft ... they're

comfortable, definitely.’ Consumer 5 shared the experience of using eco-apparel in the following way:

It was a little bit more expensive, but the difference in the quality is wonderful. So soft, and the kids all love wearing their socks and their undies because they’re soft and they’re comfortable, definitely. (Consumer Interview 5)

Even the managers believed that eco-apparel is comfortable. Some of the responses from managers were:

When I do show the items and they see they're so soft, they're high quality (Manager Interview 4). They're more comfortable next to skin, so maybe it is the personal immediate consequences that people might relate to. (Manager Interview 6)

One of the Hemp store managers said, ‘Yeah, it's an antibacterial, the fabric. It's breathable, it's mould resistant. You find with hemp, you won't sweat, like under your arms’ (Manager Interview 11). Thus, from the analysis above, it would be correct to say that eco-apparel offers much higher standards in terms of comfort.

4.2.3 Augmented features

A product generally has three different levels (Kotler & Armstrong 2012). One of them is the augmented level which includes non-tangible features which are added value received for buying a product. The consumer may not need to pay extra for this value. Such values can be warranty, customer service support or any after-sales services (Armstrong & Kotler 2005).

Consumers were asked about the factors that would affect their apparel purchase, and they were also asked if their preference for eco-apparel would be affected by some kind of added value such as a warranty and guarantee. They expressed that their preference for eco-apparel would be affected if there was any sort of

warranty, refund policy or guarantee of its quality. The responses were interesting. Consumers said that they were ready to pay slightly higher prices for an extended service of augmented features with apparel products. However, it is not known if they would choose such factors over other factors of apparel. During the interviews, consumers did not initiate discussion regarding augmented services themselves. However, when the researcher asked them if they would be happy to have such benefits, they generally said

If I went into a store and they were marketing eco-friendly and could promise and guarantee that the production process was actually good for the environment and haven't sent any horrible toxins down the river and dies with the rest of it, I would be. (Consumer Interview 8)

If you get a warranty and a guarantee that if it starts to come undone or falls apart and you're not happy, you can get a full refund or a replacement, definitely, definitely makes a difference. (Consumer Interview 5)

That's right. But if you're saying maybe, depending on the market, maybe \$15 or \$20 but you're going to give me a guarantee, or the shoes, you're going to give me a guarantee, I can buy those shoes – yes I'm going to pay more – but I've got a warranty on them, and then when I'm finished with them you can recycle them and put them back into the community somewhere, and it can be a playground floor or you're going to give it back to the community and they'll make something else and on-sell it, that's kind of adding value. (Consumer Interview 3)

They would be happy to have such benefits in the case of products like shoes. There are a few things to be noted. Consumers said that their choices and decisions are affected by loyalty programs. They would also be ready to pay a slightly higher price if they were getting rewards for their purchases. They would most of the time purchase from the same store where they got a loyalty reward. Eventually, it

becomes their habit to purchase from the same store, irrespective of price. From the overall analysis it seems that consumers value augmented benefits, but since they have not used adjectives, we cannot say it is a much higher factor. Taking into account some positive responses such as ‘makes a difference... yes I’m going to pay more’, augmented features can be labelled as a somewhat higher factor. During the interviews, consumers mentioned specific augmented services such as guarantee, warranty, refund and exchange, loyalty and reward programs. After that, the researcher looked into the data to see how eco-apparel performed across this factor. It was found that eco-apparel companies are aware of the necessity of augmentation of their products and had refund and exchange policies incorporated into their product strategy. However, there is no evidence of any reward or loyalty programs. Below is a response from a manager participant:

We give a 100% guarantee of a refund or an exchange if the item doesn’t fit or suit so they have that peace of mind if they make a mistake. All of the product just doesn’t suit them then they’re not locked into it and they can get their money back or change the size. I think it’s certainly, online is definitely huge but clothing certainly has that barrier of not being able to try neither touch and feel. (Manager Interview 8)

Apart from the refund or exchange policy, which is a very common approach, the researcher could not find much evidence of different innovative augmented benefits added to eco-apparel. Thus, it is not appropriate to say that eco-apparel performs averagely or at above average in terms of augmented benefits. At least eco-apparel companies generally have refund policies, so it can be rated above ‘much lower’. Therefore, eco-apparel performs somewhat lower in terms of augmented benefits.

4.2.4 Place and Distribution

The theme of ‘place and distribution’ used here, refers to how eco-apparel or apparel should be sold or distributed to reach a majority of consumers (Kotler & Armstrong 2012). Consumers mentioned different places and ways of buying

apparel. They stated that they would buy apparel from physical stores, online stores, social media and maybe even via catalogues and magazines. For example, they said they would buy from 'a few boutiques, Myer (mall), Facebook, Carindale (place with big mall), online, Target (supermarket)'. However, they also mentioned that it is important for them to feel and touch apparel to make a decision, so most of the time they would prefer buying from a physical store. They have habits of buying from big malls and supermarkets. They want to buy apparel from a physical store so that they can have face to face discussions with store employees, but surprisingly they do not want to buy from door to door salespeople. They would rather buy online than buy from door to door salespeople. There is more than one way of buying apparel; however, one common aspect among consumers is that the place should be easily accessible and convenient for consumers. Consumers are ready to explore different options or stores. They did not mention that place can have a much higher influence on their choices and interest. They did not say they would buy a product just because it was available all over. They said they do not mind buying products from anywhere as long as the store has a product that they are looking for. However, they want more options or they expect products to be available in more stores. From the analysis, it can be seen that consumers take the factor 'place and distribution' as an important value, obviously at the above average level. They used the phrase 'more stores', which means they value it somewhat higher than average.

*I think just generally there has to be more information out there, and maybe more choice, or more stores that offer that option, or even when you're in the store a signage that says it's Eco-Friendly Apparel.
(Consumer Interview 7)*

In the case of eco-apparel, some consumers said that they have not even seen eco-apparel stores or products. In response to a question posed by the interviewer, one of the interviewees said that she had never come across eco-apparel while doing street shopping: 'Not that I can remember. I must say, if it's specifically stated then yeah'. (Consumer Interview 9)

It is very difficult to find eco-apparel products in the market. One of the managers said that, 'We are so surprised that we have to really search to try and find organic products here in Australia' (Manager Interview 5). This indicated that there are very rare 'brick and mortar' stores of eco-apparel in the main areas of the market. Most of the time eco-apparel is either available online or in some seasonal organic markets or trade fairs. This is evident from the manager's response mentioned below:

Yeah, we don't have a physical mortar and bricks shop, we're online and wholesale, but occasionally we're at the organic markets in Brisbane, it's predominantly an organic food market. (Manager Interview 2)

Selling in organic market fairs would expose the products only to niche organic consumers. The majority of visitors to such markets would be eco-conscious consumers only. Eco-apparel companies are so far placing and distributing their products exclusively to self-motivated eco-conscious consumers. These are the consumers who would not mind spending more time, money and energy to buy eco-apparel, as opposed to the majority of consumers. The overall distribution of eco-apparel seems to be much lower than for regular apparel. The majority of consumers prefer going to malls and shopping streets to explore various options. The majority of the time, people would like to touch and see the product in real life, rather than buying online. Regarding online buying, consumers said that:

I haven't bought anything online. Although, I sometimes look, I guess for me, I like to try ... I actually don't like to try things on but I feel like I need to see it. I want to see what the quality is like especially for cotton. (Consumer Interview 8)

Consumers often have bitter experiences of buying products online. Sometimes products do not look the same as they were shown in photographs on the website.

I've had some good stuff I've bought online and some of the stuff has been not very great. It's come in and it hasn't looked as good as it did online. (Consumer Interview 1)

From the above analysis, it is now evident that eco-apparel companies need to adopt an optimal distribution strategy. Eco-apparel companies are generally small companies and they may not have sufficient resources or capacity to do intensive distribution of products. Eco-apparel being a new concept, it may be necessary to disseminate more information to consumers and take more control over distribution channels. Thus, a selective distribution strategy could be an ideal approach for eco-apparel at the moment.

4.2.5 Branding

The theme 'branding' refers to the unique name or image of apparel or eco-apparel (Kotler & Armstrong 2012). The researcher found that proper branding was another key factor for the success of apparel. Brand is another key factor that consumers take into consideration when buying apparel. Consumers associate brand with quality and trust. They buy certain brands and if they are satisfied, they remain loyal to that brand.

As long as it's the right fit and comfortable I go for that. If I stick to a brand it's because their style seems to suit me better than other brands. Maybe a bit. (Consumer Interview 9)

In the market we might find several different brands offering the product we want. Some brands may be very popular, while some brands may be relatively less popular. Some brands are luxury and high end brands, while some are interpreted as regular brand. Consumers value a brand; however, they do not value it as a 'much higher' factor. They do not buy a brand if it is out of their budget. This means consumers stick to a brand that is in their budget. Some examples of the views of consumers are as follows:

You might say, I know which brands fit me well and I know the sizing and things like that. You might say I go for certain brands. I don't go for the high end brands, again very expensive. I just know there are certain brands that fit me. (Consumer Interview 10)

Yeah, I don't really check what's on the label. I will buy, sort of, like, labelled clothes. Like, it's a brand I like. So, I don't even have a look at the stuff that's in the clothes. (Consumer Interview 1)

People, particularly younger people want to wear something that's acceptable in their peer groups. (Manager Interview 2)

Big businesses still predominantly using non-organic cotton and they have more money to market, they have more money to spend on the development of the product, so I believe people shop predominantly on price, and what it looks like and then the other factor that comes into it is the brand as well. (Manager Interview 2)

Thus, price, fit, size and fashion become first priorities rather than branding. The apparel market is highly competitive, meaning a brand needs to stand out and prove itself to gain market share. Apparel managers also believed that consumers associate emotionally with a particular brand. They select a particular brand to satisfy their self-esteem and social status.

Status. Yeah, because I mean, that's the thing with the brand. When you buy into a brand, you're buying some kind of emotional connection or a status item that you say 'Well, I'm wearing Versace' or whatever it is, Gucci, any of those brands. That all comes to people's pretension. Their idea of identifying with this brand. I guess the key part is how to get people to identify more with an eco-brand. (Manager Interview 6)

The consumers said that they had not come across eco-apparel brands. Branding is all about advertising and promotion. When consumers say they are not even aware of the product, this indicates that there is a much lower amount of work done on the branding of eco-apparel. There are only a few big brands involved in eco-apparel.

From my point of view as a consumer of some of these products, I basically, for instance at Vans, I buy hemp at Vans and I go out of my way to buy hemp at Vans or a pair of hemp shoes because I know it's not so much that is a brand I want to be seen in that but because I know they make a quality product. I know, just being made with hemp, it's just adding that bit of eco-friendliness to it. (Manager Interview 11)

The organic cotton market is evenly split between Europe and the United States and the brands and retailers offering the largest organic cotton product ranges worldwide are Wal-Mart, C&A, Nike, H&M, Zara, Anvil, Coop Switzerland, Pottery Barn, Greensource and Hess Natural. (Report 2)

4.2.6 Durability

The theme 'durability' is described as the life of apparel or eco-apparel. How long apparel will last is a key factor considered by consumers. In response to interview questions, one of the participants said, 'I would look at price, because I won't pay \$70 for a shirt, and I tend to go with places that I know, so for example Target has a really good line of women's workwear and they're long lasting and they're durable' (Consumer Interview 3). It is indicative that consumers know about the durability of apparel products from their previous experience. When they buy apparel for daily use, they expect it to last for a long period of time. Apart from experience, consumers judge the durability of apparel by touching and feeling the fabric. If the fabric is thick, they are likely to consider it to be strong and durable. It is interesting

that consumers are ready to spend extra energy, time and money to buy durable and strong apparel. One consumer was asked if she would be ready to travel a distance to buy eco-apparel which is much more durable and stronger. She said, 'if the shirt is going to be a massive, long lasting, durable, super-shirt then yes' (Consumer Interview 2). There were similar responses from other participants who said durability is important when choosing apparel. From such responses, it can be inferred that consumers are desperately looking for durable products. So, durability can be marked as a 'much higher' value in the case of apparel consumption.

In terms of durability, eco-apparel uses strong, stable fibres such as hemp, bamboo and organic cotton, and can be rated 'much higher' in comparison to regular apparel. Eco-apparel uses natural fibres which are produced without using chemicals. Further, no chemicals are used during washing, spraying and any other such processes. It is due to this that fabrics of eco-apparel remain intact for longer. Eco-apparel is thus several times stronger than conventional apparel. According to one of the managers, 'Its textile strength is four times stronger than what cotton is, there's nothing like an organic t-shirt--it lasts forever and feels like second skin' (Manager Interview 11). Eco-apparel lasts for a long period of time and thus the cost of buying one item of eco-apparel and a couple of other cheaper conventional pieces of apparel would be the same. These responses confirm that eco-apparel is very strong and durable. Even the designers believe that durability is one of the key features of eco-apparel and is associated with its overall quality. The text below was found in a report.

Good design plays a significant role in Marimekko's responsibility. Timelessness, quality, and functionality are the cornerstones of Marimekko's design. We want our products to withstand time and we want our customers to get attached to the products. Durability is also a key indicator of a product's ecological quality. (Report 9)

Overall, durability is very highly valued and eco-apparel's performance is much higher in this factor.

4.2.7 Fair wage

The theme 'fair wage' used here is described as 'the proper wage paid to workers and employees in apparel production'. Fair wage is a component of ethical fashion. The characteristics of ethical fashion and eco-apparel are common (Joergens 2006). Though they have different labels, the core idea and components of the products are the same. Out of 12 consumers, only one participant - only 8.33 % of the sample - said that she would be looking for how and where the apparel was made when purchasing apparel. She would be looking for other quality parameters and at the same time she would also make sure that the apparel company paid a fair wage to employees before making a decision.

As much as possible the quality, whether I should use it. I'll sit and then try to look at clothes that are fair to the workers who make them. Just looking in terms of whether the clothing companies are responsible in that way, that sort of thing. (Consumer Interview 9)

Lately, there has been much discussion about the ethical issues in the apparel industry. Some conscious consumers are aware of the ethical issues in the apparel industry. So, it is emerging as one of the factors that could influence the apparel purchase decision. Based on the data gathered for this research, more than 90% of consumers do not care if the employees are paid well. 'Fair wage' has not been a major factor. Thus, it can be said that the factor 'fair wage' is considered 'much lower' in terms of what is valued by apparel consumers. Fair wage is not an appreciated factor; however, eco-apparel is produced in sustainable ways, where producers and employees get a fair share. The farmers are paid good prices for producing natural fibres; the weavers and knitters are also paid a fair amount of money for their effort while producing eco-apparel. According to one of the participants:

If we look at developing countries where a lot of organic cotton is grown, they're more than often fair trade certified, so they're actually getting

paid possibly more than they would for non-organic crops. (Manager Interview 2)

'Fairtrade is about fairer prices and terms of trade, decent, safe working conditions and local sustainability, for farmers and workers in the developing world' (Council 2014). Thus, since eco-apparel is a fair trade certified product, its performance across the factor 'fair wage' is much higher.

4.2.8 Fabric

Fabric is made of fibre material used in producing apparel or eco-apparel (Majumdar, Mukhopadhyay & Yadav 2010). The interview text related to how different fabrics and their properties affecting the apparel purchase decision of consumers were coded under this node. There are different sorts of natural and unnatural fabrics used in apparel production. Consumers want to feel and touch the fabric before they buy any product. They want to confirm how the fabric will feel. They would generally prefer soft fabrics. They do not worry much about where and how apparel is made as long as it feels nice and soft. This is what a participant said:

I would probably end up choosing the one that's good quality material, made good and what I like. It really wouldn't matter where it comes from, as long as I like how it feels. (Consumer Interview 7)

Consumers even consider softness as a parameter of quality of apparel. There were similar responses from other participants as well. They would first consider price and material of the cloth equally more important than brand. For example, 'the first thing is the price and the material of the clothes, but I don't care about the brands' (Consumer Interview 4). From the way consumers have expressed their view in regards to fabric – for example: 'it really would not matter where it comes from, as long as I like how it feels' (Consumer Interview 7) it is evident that fabric is a high value factor. However, this also depends upon the gender of the consumer. Males generally do not care how the fibre feels as long as it is fashionable and looks good on them, whereas females are more concerned about the fibre and its feel. They

may not buy apparel which feels rough on their skin. They are quite sensitive and particular about their skin and body. Here is what one of the female consumers said:

Because women like to feel nice, they like their clothes to feel nice, and men just put on whatever. I suppose they care how they look, but it doesn't matter to them if it's a natural fibre or a manmade fibre, and I think women are more sensitive to those things. (Consumer Interview 5)

Overall, fabric is a high value factor for females and a relatively low factor for men. Thus, it can be rated as an average factor. Eco-apparel fabric has a different texture and feel to the conventional apparel. It is one of the differentiating factors of eco-apparel. One of the eco-apparel managers shared her experience in this way:

The thing is, when I go and try to sell my product, everyone, the first thing, they look at the price, they ask how is it called organic. Then I explain to them. But, still, for them to see, there is no difference. It looks the same, the colour looks the same, but the fabric texture is different. They can feel the texture. (Manager Interview 3)

Some types of fibres used in such apparel are hemp, bamboo, viscose and organic cotton. Among them, organic cotton fibre is undoubtedly the best one and feels very good. There are many positive answers from participants regarding the softness of organic cotton fibre. Bamboo fibres, on the other hand, are very raw and not soft. In regards to organic cotton fibre, one of the participants said that 'in some instances I think the feel of the [organic cotton] fabric is softer as well' (Manager Interview 2). Some of the responses regarding organic cotton are:

Of everything that's coming in, 90 percent of that would be made from cotton. It's stable fabric and it's a good fabric and, hence, it's proved its point over the years by being a very stable and a worthwhile fabric. (Manager Interview 7)

The hemp fibres are not grown everywhere and thus the supply is very low. Compared to hemp and bamboo fibres, organic cotton fibre apparel performs very well. When we look at eco-fibres in general, then it can be concluded that eco-apparel is performing at an average level in terms of fabric and feel. This is because only organic cotton fibre is soft and abundant while other fibres are not soft and also scarce.

Further, eco-fibres do not have drapes; drapes are the fold of the fabric. Drape is an important factor that determines the beauty of apparel. When one wears apparel, the way the apparel flows and forms a shape in relation to the body and to gravity is determined by drape. Drape is defined as 'the extent to which a fabric will deform when it is allowed to hang under its own weight' (BS 5058: 1973, 1974). Due to their not having enough 'drape', it is challenging to produce different styles from eco-friendly fabrics.

Additionally, the availability of fibre is also a challenge in the eco-apparel sector. It was found that generally hemp is cultivated to produce hemp food and the fibre is a by-product. Since selling hemp food is illegal, farmers are not motivated to produce hemp, which ultimately hampers the availability of hemp fibre. Bamboo fibre itself uses lots of chemicals to produce soft fabric. There are many legal questions raised about bamboo fibre. Pure organic bamboo fibre is not soft.

Sensitive, yes, that's right. That could be. If it's itchy or anything like that, that would put people off. Some of these natural products are a little bit rough. I'm just trying to think. I lived in Laos one year and I can remember there was hemp. It was very rough, very, very rough.
(Consumer Interview 10)

4.2.9 Fashion and style

The theme 'fashion' in regards to clothing is described as current trends in regards to clothing and apparel (Azevedo et al. 2009). The trend could be the latest design

or style or any way of wearing apparel. Generally, consumers pick up fashion styles from different media, friends and colleagues. Especially, young consumers are desperate to keep up with the current fashion and are ready to put in extra effort and money to buy fashionable items. One of the respondents said that, 'The peer pressure and keeping up with the Joneses and things like that is far more important for a younger person. They want to stand out'. They are ready to buy flashy and stylish apparel even if it is not comfortable. One respondent shared her experience: 'It just reminded me I took a little friend out shopping once. She was about 18 or 19. She was trying on some jeans. They had to practically pour them onto her. I said, 'How can you breathe?' She says, 'No pain no gain,' or something like this. It was what everybody else was doing and that was just so important'.

Fashion and style go hand in hand. At some point one style may be in fashion, and it becomes a common form of behaviour to wear a style which is currently in fashion. However, some consumers would choose stylish apparel, but the style they have chosen may not be in fashion. Their selection might depend on how they look in certain apparel or styles. This is what an interviewee said in response to style: 'I like the style of the clothes. I mean a style that suits me in particular rather than something that's fashionable right now for everybody.' Rather than going with fashion, they have their own preference in regards to style. Consumers stick to their style of wearing clothes and apparel. If there is a certain brand or retail store providing the styles preferred by a consumer, that consumer would prefer buying the same brand and from the same store.

Overall, fashion is an important factor that can influence the apparel purchase. However, it is not always predictable across the entire population of consumers. Its value differs with different age groups. The priority of consumers changes as they grow older. Young consumers highly prefer fashion while older consumers would not prefer fashion as much as the young generation does. However, they prefer style to some extent. Here is a relevant response given by an interviewee:

As I said, comfort is, but you also want to look well. I suppose if you're looking at younger people, it's the different styles, whether it's going to

be jeans that are so tight that they can't breathe, I don't know. I just don't understand it. (Consumer Interview 10)

Thus, fashion and style can be rated as a factor that is valued 'somewhat higher'. In terms of fashion and style, eco-apparel is far behind regular apparel. There are only limited styles of eco-apparel available in the market. Consumers already believe that eco-apparel does not have any style. The eco-apparel currently available is plain and simple. Those styles are more often considered as 'hippies' styles', and are not preferred by the majority of consumers. One of the managers shared that, 'There is a stigma when you say eco, organic. People immediately think expensive. They immediately think, 'Oh it's hippy, or it's not stylish, not well fitted' (Manager Interview 4). Even managers accepted the fact that they do not have many styles in eco-apparel. There are several reasons as to why there are not many styles. Styles are designed by designers or professionals. In the case of eco-apparel, companies do not want to hire designers, because they believe doing so would increase their expenses. The business owners most of the time design their products themselves rather than hire or consult a designer. These owners may not have sound knowledge about styles and designs. They would produce or sell whatever they felt to be right, which may not be the choice or demand of consumers. Another reason behind not having many styles in eco-apparel is the lack of fabrics with different patterns and stripes.

4.2.10 Health and environment friendliness

The theme 'health and environment friendliness' is described as the benefit of apparel on health and the environment plus how consumers value them (Atilgan 2007). The texts surrounding how health and environment related factors affect consumers' apparel preferences were coded under this node or theme. During the interviews, consumers expressed a mixed view regarding healthiness and environmental friendliness. Consumers know that health and the environment are correlated. They value both healthiness and environmental friendliness. However, there are relatively more consumers who would buy eco-apparel for health related

reasons rather than for environmental. For instance, one of the responses of the participants was:

I don't know. Both of them are important but because if you ignore environment, the consequences will be ... it affects your health. It's not two different things. The first is health, I think. (Consumer Interview 4)

The chemicals used in apparel may cause dermatitis. Some of the fibres are itchy and may cause rashes on skin. Consumers do not prefer apparel made out of such fibres. Consumers that have sensitive skin or any skin disorders consciously purchase apparel made of healthy fibre: 'Definitely, and my daughter and grandchildren have itchy skin, so it's important what they put on their skin' (Consumer Interview 5). These consumers are conscious consumers and they search for eco-apparel themselves. It seems that other consumers are not aware of how chemicals in conventional apparel can affect their health as well as the environment. Consumers who have not experienced any skin disorders would not care as much about the health related factor unless there was hard evidence demonstrating the benefits of eco-apparel for health. Such consumers may value the environment to some level rather than health. Here is what one of those consumers said:

Then environment, then health, not because I don't think health is important but in my mind I've never experienced any bad health because of clothing, so it doesn't seem like an issue for some reason. (Consumer Interview 9)

As well as for skin disorders, consumers might consider the health related factor when buying apparel for their children. Particularly, middle aged groups such as parents might consider the health related factor when purchasing apparel. They want their kids and families to be safe, so, they look into the facts to determine if the apparel is safe and healthy. For example, a female respondent said, 'I know I've got three nieces who all used, like you said, the nappies. I don't know if they're

hemp nappies? Or bamboo? And all three nieces use them, because one had a child and said, 'Oh, you girls, when you're pregnant you need to use this! And so they all did, so they all bought stuff for their children, their babies' (Consumer Interview 5). On the other hand, single people may demonstrate less commitment towards health and the environment. Apart from family and kids, consumers would consider health as an important factor when it comes to private parts and sensitive parts of the body.

Overall, consumers value healthiness much higher, mostly in cases of skin disorders or sensitive skin, children and sensitive parts of the body. They consider environmental friendliness much lower. Thus, it can be said that, 'healthiness and environment friendliness' is an 'average' factor for the majority of consumers. The problem is that even though consumers know that chemicals in apparel can affect their skin, they do not realise the fact that they are being affected. They expect hard evidence to indicate that they have been affected. An interviewee said,

I guess if I've experienced, if I had an allergic reaction to a piece of material, then I would be more inclined to buy natural things, but I have not had a problem with that before. I wasn't even aware you could get allergic reactions from materials. (Consumer Interview 12)

Unless there's hard research that says there's a higher incidence of X, maybe skin irritations, on people who use sheets, whereas we have found... for example, soaps, there are some soaps that have done really well because the people have been able to say 'this product has proven that it is very good for children with eczema', and I also know, when I was at one of the Brisbane hospitals, that soap, I think it was called 'Moo' soap, and goat's milk soap, etc., it was sold in the chemist at the hospital for cancer patients, because they didn't have reactions to it and it was very soft on their skin when their skin was irritated from chemo. So it had demonstrated... but that's not something that was widely marketed with the product. (Consumer Interview 3)

Further, people are complacent towards environment protection and they think it is not their individual responsibility to protect the environment. This is what a manager said:

I think in general most people agree that we need to take steps to care for the environment in better ways. But of course most people... there's complacency, so most people think that someone else is going to do it, the government or their neighbours or leaders in the community are going to do it. (Manager Interview 2)

The challenge is to educate people to feel or realise the effect of conventional apparel on their health.

I think a lot of people with education will realise that they do have skin conditions and they can help it by organic cotton but they're not educated at the moment to know that that could be a benefit for them, I think it really comes down to education. (Manager 8)

4.2.11 Label with certification

The theme 'label with certification' is described as labelling used in apparel and eco-apparel. The data was collected to see how labelling and certification on labels affected consumers' apparel purchase decisions. The label generally contains important information about apparel or eco-apparel. Labelling contains details about the product and can help consumers understand the facts, which aids them in making a decision. It was found that consumers do check the labels of products. The higher the price of a product, the more likely it is that consumers will seek more information. When consumers are buying expensive apparel, they will look into the label to confirm that the product is worth the amount they are going to pay. During online purchases, consumers cannot feel or see the product physically, so they try to read the label of the product and collect as much information as they can to confirm their choice. When consumers were asked if they checked the labels of apparel they buy, they said:

Yeah, I check the labels. I think that's the only way you can find out. Clothes can be very deceptive. You've seen that this cloth is made up of certain material but it's not the case, unless you flip the shirt and look at the labels. (Consumer Interview 6)

When I'm not sure about something, that's the time I do check the label. For example on any other occasions when I'm purchasing something from online, and I physically can't see that item in my hand and touch it, I make sure that I check the labels. I scrutinise every bits and pieces of the information online. (Consumer Interview 6)

If it's something that I want to last, like a good jacket, or a good pair of jeans, then I'll look at the label. (Consumer Interview 2)

Overall, it was found that consumers check labels when they are not confident of the product or are using it for the first time, when they are paying a relatively large price and when they are buying online. Apart from this, they may not check labels when they are buying a known brand, known product or when they are buying a cheap product. However, even in the case of a known product, they must have checked labels when they first bought those products. Labels and the information on them play such a big role in increasing the confidence of consumers and even in helping them in making a decision to pay a higher price for apparel. Labelling is a 'much higher' factor in terms of importance when buying apparel or eco-apparel.

Eco-apparel is a new product segment and it is really important for eco-apparel to gain the trust of consumers. Regarding eco-apparel, there is much confusing and misleading information circulating among consumers. There are producers who claim their product is eco, just because their products are produced using fibres produced in hills and remote areas without using chemicals. However, these products are not certified by proper certifying agencies or laboratories as organic or eco-apparel. Thus, these products may not guarantee the same benefits as true and

certified eco-apparel products can provide. One manager shared his knowledge:

One thing I would say specifically about eco-textiles, the general term, is I think it's a very misleading term for consumers and it's used a lot and it's to me quite a soft term that could potentially be misleading. Quite often the response has been that it's made in the high lands of the mountains of Thailand, it's by a local farmer, they know they don't use chemicals, the family also use natural dyes and they make it. When I've queried about is it actually certified organic? (Manager Interview 2)

Such kinds of products on the market dilute the value and customer trust of truly certified eco-apparel. Due to such misleading and unverified claims, consumers hesitate to trust eco-apparel. They think it is just a marketing gimmick. There are cases where the seller has sold inorganic bamboo fibres as organic bamboo products. It is interesting to know that bamboo can be produced organically and inorganically. Thus if a piece of apparel uses organic bamboo fibre, only then can it be potentially classified as eco-apparel. Unfortunately, consumers do not know about eco-apparel in detail. Due to a lack of proper communication, there are rumours that hemp fibres are not good for health and can cause serious skin disease. Also, sometimes consumers assume that eco-apparel products are expensive. It would be unjustifiable to say so without doing a proper comparison or without sufficient knowledge and information about eco-apparel. On the one hand consumers do not easily trust eco-apparel and on the other hand eco-apparel products are expensive. It would be a daunting task to sell a product not trusted by consumers, at a premium price.

Certification can be a good approach to gaining the trust of consumers. Organic certification, eco-certification and other relevant certifications can increase the credibility of eco-apparel. However, there are still some challenges faced by certification as well. There is no doubt that certification will enhance the authenticity of eco-apparel, but only if consumers are aware of the certifying company and the meaning of certification. There are several companies which are

able to certify eco-products according to different criteria. Some of them certify on the basis of green washing; some certify on the basis of energy use; some certify on the basis of chemicals used; and the list goes on. All of those certifications are eco certifications in one way or another. It is not mandatory by law for eco-apparel companies to certify their products. These certification companies are private and the decision to certify is solely the company's own choice. For example:

The GOTS label, which covers all natural fibres, aims at ensuring the organic status of textiles, from the harvesting of raw materials through environmentally and socially responsible manufacturing to packaging, labelling, exportation, importation and distribution. To date, more than 2 000 textile facilities are participating in the inspection and certification system of GOTS; a GOTS logo was launched in August 2008. A product labelled with the GOTS logo contains at least 95 percent certified organic (or in conversion) fibres. Textiles containing 70 to 95 percent organic (or in conversion) fibres are labelled as 'containing at least X percent organic fibres.' (Report 2)

Consumers are not aware of the different certification schemes and criteria. Until and unless they know what a certificate means, certification itself will not be able to convince consumers.

Private certification schemes, no matter how stringent, are only valuable if they are understood and trusted by consumers not to be marketing ploys playing upon their desire to purchase ethically. (Report 2)

Thus, in addition to labelling with certification, eco-apparel companies also need to educate consumers about the features of a certification awarded to their eco-apparel. Eco-apparel must focus on labelling and how information can be shared through labels. As an example, one of the managers said that there used to be a swing ticket on their products that gave information about how the product was processed and made, and this tactic helped increase the sales of sustainable fashion significantly.

I think there was certainly renewed interest in sustainable fashion many years ago, and therefore we produced a cotton mark swing ticket that carried information about where that product was produced, how it was processed, and where it was manufactured. I think that saw the industry overall enjoy quite a significant increase in sales for a period of time. (Manager Interview 9)

Even managers agreed that labels are very important in disseminating information about eco-apparel, but they have not been used much in the case of eco-apparel. 'So, you go to a shop, and how you differentiate between organic and non-organic is, is defined on the label' (Manager Interview 3). When a new owner of an existing apparel store was interviewed, she said that, 'The lady that has previously owned the business did none of that. It's hardly had much labelling on it at all' (Manager Interview 1). Because of a lack of proper labelling on eco-apparel, there is confusing information among consumers. One of the respondents shared that, 'Last year I contacted a number of government departments around the labelling of organic textiles so I think there's a lot of misinformation out there around organic' (Manager Interview 2). This means even if there is labelling, the labels often are not appropriate for eco-apparel. Since it is not mandatory to get eco-certificates to sell eco-apparel, eco-apparel companies may not necessarily certify their products to sell in the market as eco-apparel. This is because, as per the following report:

Current legislation on the labelling of organic products in Europe and the United States only covers seed cotton in its raw and unprocessed form, leaving the labelling of organic textiles to the discretion of the manufacturer or retailer. (Report 2)

There are two kinds of eco-apparel on the market: one with eco-certificates on their labels and the other without eco-certificates. This will obviously create a mixed perception in the consumers' minds. Some producers claim their product to be eco-apparel or organic just because they are produced from fibres from some

hilly areas and so on. Such products may not be organic and should include appropriate certifications in their labels. Moreover, one manager said that most of the companies are not properly certified.

There are certified companies of course, but again when it's produced overseas unless the government is coming with 100% certification, there is no guarantee, and how many such suppliers are there if you actually look in, there is very few, very few. (Manager Interview 12)

Along with other general information such as care instructions, country and brand, proper certification is highly necessary for eco-apparel. There are organic certifying or eco-certifying companies such as GOTS (Global Organic Textile standard), OCS 100, OCS Blended and OEKO-TEX, but very few eco-apparel companies are using these certifications. These certifying companies have their own standards and criteria. All these labelling companies are private and acquiring certification from them is a voluntary process. Even if a company is certified, for example GOTS certified, consumers are unaware of the meaning and value of different certification schemes. For example, one of the managers shared that GOTS has a certification number which consumers can use to track the details of product through the internet. Unfortunately, consumers are often not aware of all these certifications and verifying processes. Another big question is whether consumers will spend so much time and effort to confirm the quality before buying eco-apparel. Report 2 says that, 'Private certification schemes, no matter how stringent, are only valuable if they are understood and trusted by consumers not to be marketing ploys playing upon their desire to purchase ethically.'

Overall, labelling with certification is a 'much higher' factor in eco-apparel. A proper label with certification can help consumers make a better choice; however, there are very few eco-apparel companies using labelling with proper eco-certification. Thus, it can be said that the performance of eco-apparel is much lower in the case of this factor.

4.2.12 Pricing

The theme 'pricing' is described as the price of apparel and eco-apparel in monetary terms (Kotler & Armstrong 2012). During the interviews, participants mentioned that pricing was one of the key factors that could affect their apparel purchase decisions and choices. Here is an interesting response from one of the interview participants:

Yes, of course price comes into it as well, yes. On the other side, I'm not going to go for the cheapest thing just because it's cheap. If it doesn't fit and if it's uncomfortable, I'm not going to buy because that's not a bargain. (Consumer Interview 10)

This means that though price is a key factor, it is not above other factors. If apparel is comfortable, has a good fit and meets the customer's requirements, the customer may not bargain on price. 'If it's over a certain price, I will look for quality' (Consumer 2). Other consumers choose a cheap store. These consumers consider price of the product at first place, followed by other factors. One such consumers said:

Oh God, just wherever. I've never really taken notice of quite anything that much, it's just like if I need something I'll go buy it, and whatever is suitable for my budget as well. (Consumer Interview 7)

If there are any products that consumers cannot afford, they wait for sales promotions and discount seasons to buy that apparel. This means price affected their purchase; however, they won't buy any random apparel just because it is on sale. Participants said, 'Yes, I always try to go when the sales are on and things like that. It's more expensive than the synthetic, but I try to shop when it's on sale' (Consumer Interview 10), 'If I can't find what I'm looking for, I don't buy it. I don't just buy just because it's something on sale' (Consumer Interview 8).

I target when there's a huge sale going on, for example during boxing day sales, or end of year sale. That's the only time I consider purchasing new clothes. There's no such thing like I have to purchase cloth on this particular occasion. If there is a huge sale going on, I'll consider, but there's no surety that I could purchase or not. (Consumer Interview 6)

Overall, there is one set of consumers who take price as the first factor and thus choose cheap stores for buying apparel, while there are other consumers who first consider other benefits of the product. However, even these consumers will not buy apparel if it is very expensive or out of their budget. Due to this, pricing can be rated as a factor which is above average and below 'much higher' as it is a relative factor. Thus, pricing is a key factor which is taken as 'somewhat higher' by apparel consumers.

In terms of 'pricing', eco-apparel products are priced highly. Because eco-apparel producers use natural fibres, use sustainable production processes and pay a fair wage to their employees, they say that they need to sell eco-apparel at high prices. For instance, one manager says

It's done in an ethical way and mostly throughout the process everyone along that way gets paid equally and fairly, needs to be sold at a higher price. (Manager Interview 11)

It has even been found in reports that eco-apparel products are very expensive. There are situations where eco-apparel companies have had to face the challenges of high price rises due to increasing production costs. One of the managers shared her experience of sustainable apparel, saying:

I think there was certainly renewed interest in sustainable fashion many years ago, and therefore we produced a cotton mark swing ticket that carried information about where that product was produced, how it was processed, and where it was manufactured. I think that saw the industry

overall enjoy quite a significant increase in sales for a period of time. But when the cost of the bale continued to rise, and the cost of production continued to rise, then ultimately the price of the product had to rise as well. (Manager Interview 9)

Most of the respondents expressed the view that eco-apparel products are expensive. ‘Little bit dearer’, ‘price gap needs to be realistic’, ‘need to be priced more competitively’, ‘very expensive’ and ‘definitely expensive’ are some of the responses given by interviewees in regards to the pricing of eco-apparel. From the above analysis, it can certainly be said that consumers perceive that the price of eco-apparel is very high; thus its performance in regards to pricing can be rated as ‘much higher’.

4.2.13 Range

The theme ‘range’ is described as the range of apparel in terms of different types of apparel as well as the range of their sizes, range of prices, and range of styles. In terms of types, apparel can be shirts, pants, work wear, shorts, winter wear, bags, shoes, summer wear, and so on. Consumers expect different varieties of items to be available under one roof. They want to try to compare different options available in different stores before they decide to buy. One interviewee shared her view:

I will go for mainstream, so I might start at Target, because in Toowoomba they have a good range, it’s convenient for me to get to (Consumer Interview 3).

On that particular occasion it was a shopping day for myself, so I actually just spent the morning, basically the day shopping in Brisbane by myself and just looked at different things and what was around and different products and then went back to the store where I wanted to purchase the items. (Consumer Interview 3)

So, it seems that when consumers have more time for shopping and they do not have a particular list of products to buy, they would browse through the different ranges of products available and choose one from them. They prefer a store where a good range of products is available rather than spending more time searching for their product in different stores. Some of the varieties of apparel that consumers mentioned during the interviews are: 'stockings, shoes, skivvies, jumpers, blouses, slacks'. Since consumers have different needs and also have a habit of comparing different products before buying, it is very important to have a range of products available in order to contend in this competitive market. Thus, the 'range of products' can be rated as a factor of 'somewhat higher' value.

Eco-apparel has a limited range of products available. There are some basic ranges such as blouses, slacks, pillows, and slippers which are quite common across conscious eco-apparel consumers. When asked about eco-apparel products, consumers more often mentioned pillows, yoga pants, undergarments, baby nappies and baby wear. One manager said:

We only specialise in certified organic cotton clothing, and we just do a basic range, so we do a basic range for babies, we do a t-shirt, a little body suit, singlets and shorts, and for adults just mainly t-shirts and tops and things, and most of that is because of the limitation with the range of fabrics, the organic cotton that we can access in Australia only has knitted fabrics, which is like a t-shirt material, so we can't get any woven fabric to make jeans or business shirts or anything like that. (Manager Interview 2)

However, the report says that there are women's eco-apparel, children's eco-apparel, accessories, men's eco-apparel and healthcare eco-apparel available on the market. Overall, eco-apparel's performance can be said to be 'average' in terms of the range of products available.

4.2.14 Disposal and Recyclability

The theme 'disposal and recyclability' is described as the process of disposing of apparel and recycling it into a new product. During the interviews, some consumers said that they like to buy second-hand apparel or used apparel rather than new apparel. Additionally, the researcher interviewed a manager from a second-hand apparel shop. When people do not need their old apparel, they want to dispose of it. Since conventional apparel is not biodegradable, consumers might give it to collection centres or needy people, or sell it to second-hand apparel shops. This apparel is then washed, cleaned and sometimes revamped before being sold again as second-hand apparel. The need for disposing of apparel, the presence of second-hand apparel shops, and the existence of consumers buying second-hand apparel, indicate that disposal and recyclability of apparel is an important feature of apparel and may carry some amount of significance in the consumer's purchase decision. The consumers, when asked if they would choose apparel on the basis of its recyclability, said that they would be happy with this added feature, however it would not play a major role in their decision making process. It could be taken as an added advantage that came with other major features of the product, but this added value would have a 'much lower' significance in the decision-making of consumers.

That's interesting but it's probably less of a motivator, but not necessarily, because if you were talking about a pair of runners, so I spent about \$150 on a pair of runners. If I paid, and you can recycle those now and they go into playground mats, and I would probably spend more, but I wouldn't necessarily for a t-shirt. So that part would depend on what it is. (Consumer Interview 3)

I'm aware of that right now. I think once every three months if I'm not wrong we do get [three 13:54] plastic bags where you can dump your old clothes and the [charitable 14:01] people will pick them up. I think they wash it off, give it a bit of cleaning and then they sell it to [inaudible 14:11], or maybe in a third world country like Africa or where citizens can't afford [crosstalk 14:18]. It's

exemplary I would say. It's a good initiative of conserving the environment as well as helping the human kind. (Consumer Interview 6)

In terms of disposal and recyclability, eco-apparel performs somewhat higher. Not all eco-apparel is one hundred percent sustainable or natural. Eco-apparel using only natural fibres, natural dyes and zero chemicals can be 100% biodegradable.

I think there's a few. I think there's recycled fashion. I think there's Eco-friendly fashion, like organic cottons. I think that would be the major two. (Manager Interview 9)

This is the potential. If your eco clothing are made of natural fibres, then this is a marketing opportunity. That the fibres that they release through wash and wear, they are biodegradable. If your eco clothing is made of natural fibres. (Manager Interview 6)

Sometimes, synthetic fibres and natural fibres are mixed to produce apparel and although this apparel can be called eco-friendly, it is not eco completely. So, the eco-apparel product segment cannot be rated 'much higher' in terms of this theme but it can certainly be said that its performance in terms of 'disposal and recyclability' is somewhat higher.

4.2.15 Fitting

The theme 'fitting' is described as the size of apparel and how it fits on the body of the user. During the interviews with consumers, the term 'fit' emerged frequently. They said that how apparel fits their body is really important. People have different physical structures and body types, and thus need apparel that exactly fits them. Well fitted apparel enhances the appearance of the user. Some consumers may prefer loose fitted apparel. Consumers may choose a particular brand because that brand offers apparel that fits right to their body. Before buying apparel, consumers often try it on to see if it fits well and how it looks. The following statements are the responses of consumers related to fitting:

Certainly the colour and how it's going to fit and how it's going to look on me. I just know there are certain brands that fit me. (Consumer Interview 10)

It will depend on the price as well, and the size of the clothing. Before I buy online they have shops here, and I'll go and try them on. Price compared to what looks good, compared to what fits. (Consumer Interview 2)

Fitting is very important while wearing apparel. Some consumers like to wear loose fitted apparel while some would prefer tight fitted apparel. One of the main reasons why consumers throw away old apparel is because it no longer fits their body. The bodies of consumers keep changing, so they need to throw their old clothes away and buy new ones. Similar evidence was found in the following report:

Some discussion took place on the need to discard clothes because they no longer fitted after a year or so, perhaps due to a change in weight. A projected future loss of weight was also used as justification for disposing of clothes (Report 8).

Overall, fitting plays a major role in consumers' decisions when buying apparel. Even if apparel meets all other criteria, consumers will not buy that apparel if it does not fit well. Thus, fitting can be rated as a 'much higher' factor in terms of apparel purchases.

One of the features lacking in eco-apparel is drapes. Draping is a process where a similar kind of fabric (drape) is used to design apparel and resolve any fitting issues.

Because these eco-friendly fabrics sometimes, when it is produced, a lot of them don't have drapes. Drapes are the fold of the fabric. The drapes, the styles, fittings. (Manager Interview 12)

Eco-apparel uses natural fibres such as hemp, bamboo and organic cottons. As stated by one eco-apparel manager, these fibres lack drapes and thus a lot of apparel produced from these fibres does not have a good fitting. That is why people may say that this apparel looks like ‘hippies’. She further added that, ‘when you say eco, organic. People immediately think expensive. They immediately think, ‘Oh it’s hippy,’ or ‘it’s not stylish, not well fitted’ (Manager Interview 4). Thus, the performance of eco-apparel in terms of fitting is somewhat lower.

4.2.16 Consumer awareness

This section covers the importance of ‘consumers’ awareness’ in the apparel market. This theme is described as the knowledge and awareness of consumers about the apparel industry’s effects on the natural environment and awareness of the fact that there are eco-apparel products available as an alternative to conventional apparel. It also includes details about how much knowledge consumers have about the advantages and disadvantages of eco-apparel. Similarly, it includes information about how much consumers know about the disadvantages of conventional apparel, as well as the importance of health and the environment. Reports say that educating people and making them aware is very crucial in making eco-apparel a success. From the following statement from a participant: ‘Because everyone’s aware now that there’s so many chemicals that we breathe in and have every day, that the less you can have them, the better you are health wise’ (Consumer Interview 5), we can say consumers are aware of the fact that damaging the environment can be harmful for our health. They are aware of the importance of health, the environment, and the fact that the environment is degrading; however, they do not know much about how conventional apparel is damaging our health and the environment. One of the interview participants expressed his view in this way:

Yeah, I understand. I just never knew that it was an Apparel. I’m aware of sustainability and eating organic foods and Genetically Modified Foods, I know all that, but I wasn’t aware of Apparels, so that’s interesting. I’ve heard

of hemp before, but that's the only thing I've heard, and I haven't heard that much of it. (Consumer Interview 7)

Maybe also it's not clear that there is many who don't see so much of as a problem buying non-organic. I don't know. Maybe it's not so widely stressed. (Consumer Interview 9)

I think the knowledge of people. The knowledge of people is not sufficient about the danger of unsustainable production that's why many people don't care about environment-friendly product. They don't understand that for what you are paying more because some environment-friendly, environmental products are more expensive compared to others. (Consumer Interview 4)

Because to be honest, I didn't even know that there was a problem with some types of clothing. I think it might be a case of educating people that there are good and bad kinds of clothing. (Consumer Interview 1)

The majority of consumers do not seem to be much aware of the fact that apparel is one of the causes of damage to our natural environment and that the alternative to this is eco-apparel. In fact, most of them did not even know that eco-apparel does exist in the market. Some common responses of those consumers were, 'So I don't know what men's clothes are out there' (Consumer Interview 5), 'I don't know. Is there stuff out there that's marketed that way?' and 'Is there actually a brand that's marketing itself as eco-friendly?' (Consumer Interview 8)

Further, managers also clearly indicated that consumers' eco-apparel awareness is very low.

I think that's where the lack of education about the importance of the fibres and what people wear has been lost and I guess people just aren't aware of it anymore. (Manager Interview 11)

The above findings suggest that there is a lack of awareness in two aspects. The first is that consumers do not know conventional apparel has a major negative effect on health and the environment; and the second is that they are not aware of eco-apparel and how its use can protect health and the environment.

As per the analysis of key factors, it was found that the majority of consumers are not giving higher value to the factors 'healthiness and environment friendliness', 'fair wage' and 'disposal and recyclability'. This is because of less awareness and education about eco-apparel. Consumer awareness has a positive effect on consumers' purchase decisions (Macdonald & Sharp 2000). Once they are aware of any apparel, they search for more information about the product, its features and benefits – in general, its value – and then they may do a trial purchase (Kotler & Armstrong 2009). In the case of eco-apparel, the awareness level is very low.

There are still many, many consumers whose immediate response to an organic garment is, 'Why? You don't eat it, do you?' Most consumers are still not informed about the meaning of fair trade, as well, though awareness is growing, primarily for coffee, tea, chocolate, and other tropical food crops. The burden will be on apparel manufacturers and retailers to build a stronger base of educated shoppers. (Report 12)

Consumers have a preconceived notion that 'natural', 'healthy' and 'chemical free' apply to the context of eating only. Clothes are worn outside and therefore we need not necessarily worry much about them. Thus, there is need of more awareness among the majority of consumers of the effect of apparel on health and the environment, and of its alternative, eco-apparel. This will further enhance the value of key factors such as 'fair wage', 'healthiness and environment friendliness' and 'disposal and recyclability' of eco-apparel. Increasing the value of these factors

with awareness can change consumers' attitudes that eco-apparel is expensive. Once consumers start valuing these factors, they will become strengths of eco-apparel.

4.3 Performance of eco-apparel across key factors of competition

RQ2: How does eco-apparel perform across the key factors of competition of the apparel industry?

The key factors of competition are factors the apparel industry currently competes on in products, service, and delivery' (Kim & Mauborgne 2005a). An optimal performance across these factors can help apparel companies to achieve their objectives. Thus, as a part of this research, 15 key factors in the apparel industry were identified and each was rated as 'Much higher', 'Somewhat high', 'Average', 'Somewhat low' or 'Much lower' on the basis of their importance as indicated by respondents. One of the research questions designed for this research was to investigate the performance of eco-apparel across those key factors. This investigation will lead further into the identification of marketing barriers to eco-apparel. The performance of eco-apparel across these factors is also rated as 'Much higher', 'Somewhat high', 'Average', 'Somewhat low' and 'Much Lower'. The performance of eco-apparel is quantified on the basis of conceptual analysis. The rating of key factors in terms of importance and performance is done in proportion to positive and negative responses of respondents. Table 12 demonstrates a summary of key factors with their levels of importance and levels of performance along with specific reasons why the performance is low. In the case of the key factor 'pricing', a 'much higher' level of performance means that the prices of the products are very high.

Table 13: Comparison of importance of key factors of competition and offering of eco-apparel across those key factors

| S.N | Key Factor | Importance | Performance |
|-----|------------|-------------|-------------|
| 1. | Colour | Much higher | Much lower |

| | | | |
|-----|--|-----------------|-----------------|
| 2. | Comfortability | Somewhat higher | Much higher |
| 3. | Augmentation | Somewhat higher | Somewhat lower |
| 4. | Place and distribution | Somewhat higher | Much lower |
| 5. | Brand | Average | Somewhat lower |
| 6. | Durability | Much higher | Much higher |
| 7. | Fair wage | Much lower | Much higher |
| 8. | Fabric | Average | Average |
| 9. | Fashion and style | Somewhat higher | Much lower |
| 10. | Healthiness and environment friendliness | Average | Much higher |
| 11. | Labelling with certification | Much higher | Much lower |
| 12. | Pricing | Somewhat higher | Much higher |
| 13. | Range | Somewhat higher | Average |
| 14. | Disposal and recyclability | Much lower | Somewhat higher |
| 15. | Fitting | Much higher | Much Lower |
| 16. | Consumer awareness | Much higher | Much lower |

Source: Developed for this thesis

Comparison between consumers' preferences and eco-apparel's performance across those key factors is demonstrated in figure 10, using Strategy Canvas, that Kim and Mauborgne (2002) designed to compare the performance of two or more industries across key factors of competition.

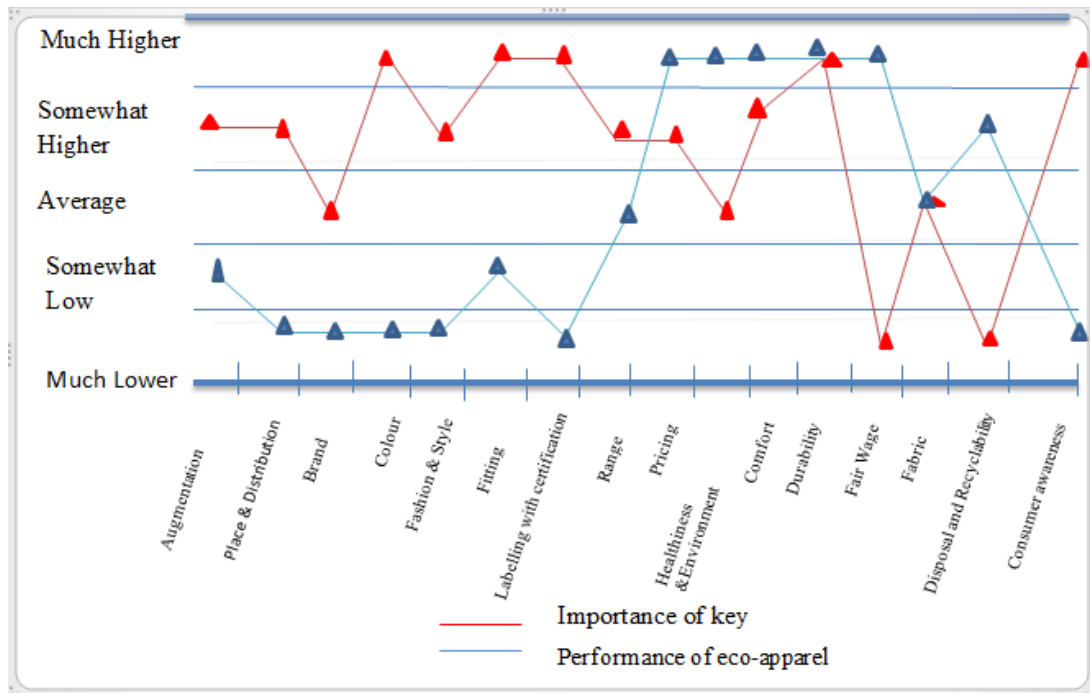


Figure 10: Strategy Canvas comparing the importance of key factors of competition and performance of eco-apparel across those key factors.

To make the analysis easier, the components ‘much higher’, ‘somewhat high’, ‘average’, ‘somewhat low’ and ‘much lower’ on the y-axis were assigned the numbers 5, 4, 3, 2, and 1 respectively, thereby making the scale quantified. The amount of importance a consumer gives to a key factor is what they expect from a product. The consumer satisfaction equation, ‘consumer expectation minus product performance’, was further used to determine the difference between mainstream apparel consumers’ requirements and eco-apparel’s offering across key factors (Anderson & Sullivan 1993; Landrigan 1999).

‘Difference in performance = Performance of eco-apparel - Level of importance (Consumer expectation)’

Table 14: Differences between mainstream apparel consumers’ requirements and eco-apparel’s offering across key factors

| S.N | Key Factor | Importance | Performance | Difference | Underlying reasons |
|-----|------------|------------|-------------|------------|----------------------------|
| 1. | Colour | 5 | 1 | (-4) | Dull and monotonous colour |

| | | | | | |
|----|--|---|---|------|---|
| 2. | Comfortability | 4 | 5 | 1 | Comfortable |
| 3. | Augmentation | 4 | 2 | (-2) | No warranties |
| 4. | Place and distribution | 4 | 1 | (-3) | Exclusive distribution/Very few stores |
| 5. | Branding | 3 | 2 | (-1) | Low branding |
| 6. | Durability | 5 | 5 | 0 | Strong fabric and no chemicals |
| 7. | Fair wage | 1 | 5 | 4 | Farmers paid well |
| 8. | Fabric | 3 | 3 | 0 | Some eco-fibres are soft |
| 9. | Fashion and style | 4 | 1 | (-3) | Unfashionable and unstylish designs |
| 10 | Healthiness and environment friendliness | 3 | 5 | 2 | Chemical free Natural fibres used |
| 11 | Labelling with certification | 5 | 1 | (-4) | Improper labelling with substandard certification |
| 12 | Pricing | 4 | 5 | 1 | Premium priced products |
| 13 | Range | 4 | 3 | (-1) | Short range of products |
| 14 | Disposability and recyclability | 1 | 2 | 1 | Disposable and recyclable |
| 15 | Fitting | 5 | 1 | (-4) | Unsuitable fitting |
| 16 | Consumer awareness | 5 | 1 | (-4) | Consumer ignorance |

Source: Developed for this thesis

This table shows the differences between the performances of eco-apparel across the key factors. Negative differences indicate underperformance of eco-apparel in the corresponding factors, and positive differences indicate factors in which eco-apparel is over performing.

4.4 Marketing barriers of eco-apparel

RQ3: What are the marketing barriers to eco-apparel and how can they be classified?

'Colour', 'labelling with certification', 'fitting' and 'consumer awareness' have the highest negative differences, meaning that there is huge difference between the consumers' requirements and what eco-apparel is offering. Consumers value these factors highly, while eco-apparel is offering very low standards across these factors. Thus, 'lack of variety in colour', 'lack of proper labelling with standard certification' and 'lack of different fitting' are the barriers to eco-apparel that need first attention. Next to them are, 'lack of fashionable and stylish designs', 'exclusive distribution' and 'no warranties', which seem to also be barriers at some level. 'Short range of products' and 'lack of branding' are the least impacting barriers to eco-apparel.

On the other hand, across the factors 'fair wage', 'healthiness and environment friendliness', 'comfortability', 'durability' and 'fabric', eco-apparel is offering at an optimum level, or more than what consumers value. In the above case, eco-apparel's performance in terms of 'fair wage' is very high. But consumers do not care much about this factor. Similarly, in the case of healthiness and environmental friendliness, eco-apparel is already performing somewhat more highly than consumers require. There are two potential approaches to these two factors. Eco-apparel companies can either lower the investment on these factors or they may invest more on changing consumer behaviour and increasing the value of these factors among consumers. Consumers value 'durability' and 'comfort' of apparel very highly and eco-apparel's performance across these factors is very high. These are the factors where eco-apparel has a huge opportunity to be successful. These factors can be the unique selling points or strengths of eco-apparel. Similarly, in the case of 'fabric', eco-apparel is also offering at an optimum level. Thus, 'fabric' is also a strength of eco-apparel. Consumers' concern regarding disposal and recyclability of apparel is very low, and eco-apparel is offering a little more than required in this area. This means that either eco-apparel can put less effort into promoting this

factor, or it may put more effort into increasing the value of this factor among consumers. In the case of 'pricing', apparel consumers consider pricing as one of the most important factors. Thus they have given it a value of '4'. Eco-apparel's offering is '5' in terms of pricing, which means eco-apparel is very expensive. It is clearly evident that consumers would seriously look into the price of the product and their interest may decrease as the price goes higher. But eco-apparel is priced highly. Consumers' perception of the price of a product is totally dependent upon their requirements and what the product is offering. If the product is offering more than what they want, they will consider that the product is worth the price. Conversely, if the offering is low, then consumers will think that the product is expensive. It is evident from what a consumer said -

If it's over a certain price, I will look for quality. I'll research to get the best. When it comes to clothes, you just chuck it out and buy a new one. If it's something that costs five hundred plus dollars, then you want to know what you have (Consumer 2).

Eco-apparel companies have two options. First, they may reduce the price of the product, and second, they may increase the value of the product. This can be done either by adding more features or increasing the value of existing factors among consumers.

Thus, from among 16 key factors, eco-apparel is offering below the requirements of apparel consumers across 9 factors. Similarly, it is offering more than required across 4 factors. The other three factors are the strengths of eco-apparel and eco-apparel is offering at the best level across these factors, as outlined in Table 14.

Table 15: Barriers and strength of eco-apparel

| S.N | Barriers | Excess Offering | Strength Factor |
|-----|---|-----------------------------|-----------------|
| 1 | Dull and monotonous colour | Premium pricing | Durability |
| 2 | Improper labelling with substandard certification | Fair wage | Comfortability |
| 3 | Unsuitable fitting | Healthiness and environment | Fabric |

| | | | |
|---|-------------------------------------|----------------------------|--|
| | | friendliness | |
| 4 | Unfashionable and unstylish designs | Disposal and recyclability | |
| 5 | Exclusive distribution | | |
| 6 | No warranties | | |
| 7 | Short range of products | | |
| 8 | Low branding | | |
| 9 | Consumer ignorance | | |

Source: Developed for this study

These barriers were further classified under the 4Ps of marketing. A product has three levels: core, actual and augmented levels (Kotler & Armstrong 2012). Any barriers related to these three levels of the product are grouped under the heading 'product related barriers'. Similarly, place means how a product is distributed through different channels and what the intensity of distribution is. Thus, lack of sufficient place and distribution is kept under 'place related barriers'. Healthiness and environmental friendliness, fair wage, disposal and recyclability are kept under 'promotion related barriers' because of the need for increasing the value of these factors among consumers, which can only be done through different kinds of advertisements and promotional activities. The list price of eco-apparel is premium and is definitely a 'price related barrier'. Table 15 overleaf illustrates the classification of barriers under the 4Ps of marketing.

Table 16: Classification of barriers under the 4Ps

| S.N | Product related | Place related | Promotion related | Price related |
|-----|---|------------------------|--|-----------------|
| 1 | Dull and monotonous | Exclusive distribution | Healthiness and environment friendliness | Premium pricing |
| 2 | Improper labelling with substandard certification | | Fair wage | |
| 3 | Unsuitable fitting | | Disposal and recyclability | |
| 4 | Unfashionable and unstylish | | Low branding | |
| 5 | No warranties | | Consumer ignorance | |
| 6 | Short range of products | | | |

Source: Developed for this study

Thus, there are six barriers related to a product and its production; one barrier is distribution related; four barriers are promotion related; and one barrier is price

related. The presence of more barriers under the product section indicates that eco-apparel still needs to invest more in the improvement of products to enable the selling of their products to a majority of consumers. Mostly, eco-apparel companies are facing challenges at the production and promotion levels. Thus, they also need to initiate more promotional and awareness activities to increase consumers' knowledge about eco-apparel.

4.5 Marketing Framework

RQ4: What marketing framework could be developed to overcome the marketing barriers faced by eco-apparel?

A marketing framework with general guidelines about the marketing of eco-apparel to the majority of consumers will be beneficial in overcoming the marketing barriers and extending the market of eco-apparel. Let us first investigate the underlying reasons behind the marketing barriers and the general approach to solving those barriers. Table 16 demonstrates the underlying reasons for marketing barriers and the solution to those barriers.

Table 17: Underlying reasons for marketing barriers and solutions to barriers

| S.N | Key factors | Interviewee response | Underlying reasons | Approach |
|-----|------------------------------|---|---|---|
| 1 | Dull and unattractive colour | You cannot have too many colors. Because we cannot use dyes. We have to use only eco-friendly dyes that are certified by GOT. When you do organic, they're not very bright (Manager 3). | Insufficient natural dyes Not so colourful | Create more natural dyes Add more colour |

| | | | | |
|---|---|--|--|--|
| 2 | Improper label with substandard certification | <p>There are certified companies of course, but again when it's produced overseas unless the government is coming with 100% certification, there is no guarantee (Manager 12).</p> <p>A number of organizations, mostly organic certification agencies, have developed their own private voluntary standards for organic textiles, aimed at preserving the integrity of the organic nature of the certified fibre as much as possible. Private certification schemes, no matter how stringent, are only valuable if they are understood and trusted by consumers (Report 2).</p> | <p>Limited certification policy</p> <p>Only private and voluntary certification</p> <p>Consumers do not understand certification standards</p> | <p>Add trusted certification in labels</p> <p>Raise consumers' knowledge about certification</p> <p>Eliminate confusing labelling and messages</p> |
| 3 | Unsuitable fitting | <p>Because these eco-friendly fabrics sometimes, when it is produced, a lot of them don't have drapes. A lot more designers have to get into this industry, or focus on sustainable fabric and put in their designs, and get out there, really competitive designs and styles, so that we can compete with the rest of the market (Manager 12).</p> | <p>Lack of proper drapes</p> <p>Lack of different sizes</p> <p>Lack of designers</p> | <p>Create more drapes</p> <p>Add different sized apparel</p> <p>Hire creative designers</p> |
| 4 | Unfashionable and unstylish | <p>No it's not because the thing is and again this is the education where we have this situation where there may be some people that say, "Oh look I like something with a design in it," but when we talk to these people I say, "Well that's okay, if you want something with a design in it then you better buy something in the open market which is conventional, but they do contain chemicals which are harmful to you and to your children" (Manager 5).</p> | <p>Lack of designers</p> | <p>Create more fashionable style</p> <p>Hire creative designers</p> |
| 5 | Exclusive distribution | <p>Yeah, we don't have a physical mortar and bricks shop, we're online and wholesale, but occasionally we're at the organic markets in Brisbane (Manager 2).</p> | <p>Limited and exclusive distribution</p> <p>Sold online mostly</p> | <p>Selective distribution strategy</p> <p>Increase number of physical stores</p> |

| | | | | |
|----|-------------------------|---|---|--|
| 6 | No warranties | If I went into a store and they were marketing eco-friendly and could promise and guarantee that the production process was actually good for the environment and haven't sent any horrible toxins down the river and dies with the rest of it, I would be (Consumer 8). | No warranty No guarantee Low trust in product | Add warranty and guarantee Increase trust |
| 7 | Short range of products | We only specialise in certified organic cotton clothing, and we just do a basic range, so we do a basic range for babies, we do a t-shirt, a little body suit, singlets and shorts, and for adults just mainly t-shirts and tops and things, and most of that is because of the limitation with the range of fabrics, the organic cotton that we can access in Australia only has knitted fabrics, which is like a t-shirt material, so we can't get any woven fabric to make jeans or business shirts or anything like that (Manager 2). | Only basic range available Lack of designers | Increase the range Hire designers |
| 8 | Low branding | Yeah, I think if a very known brand made Eco clothing I would buy it, but because I've never heard of that brand I wouldn't buy it (Consumer 12). | No advertisements | Create more brands Increase advertisements |
| 9 | Consumer ignorance | Maybe also it's not clear that there is many who don't see so much of as a problem buying non-organic. I don't know. Maybe it's not so widely stressed (Consumer 9). | No advertisements | Increase advertisements |
| 10 | Premium pricing | What it will do, though, for consumers is when you are looking at a new series of products produced out of somewhere like China, it's going to cost 10 cents. Then you put it next to a product from Australia, and it costs 20 cents. We need to have a trigger when consumers look at those two items to say, "Okay, first and foremost, do I wish to buy Australian or do I wish to buy an import, and a lesser quality import?" I think that's where we need to be | High production cost | Add more value Increase the value of existing factors Reduce production cost |

| | | | | |
|----|--|--|---|--|
| | | focusing our energy at the moment (Manager 9). | | |
| 11 | Fair wage | As much as possible the quality, whether I should use it. I'll sit and then try to look at clothes that are fair to the workers who make them. Just looking in terms of whether the clothing companies are responsible in that way, that sort of thing (Consumer 9). | Low value of fair wage among consumers | Increase awareness and value of fair wage among mainstream consumers |
| 12 | Disposal and recyclability | That's interesting but it's probably less of a motivator, but not necessarily, because if you were talking about a pair of runners, so I spent about \$150 on a pair of runners. If I paid, and you can recycle those now and they go into playground mats, and I would probably spend more, but I wouldn't necessarily for a t-shirt. So that part would depend on what it is (Consumer 3). | Low value of disposal and recyclability among consumers | Increase awareness and value of disposal and recyclability |
| 13 | Healthiness and environment friendliness | I think it's just because people don't understand, so yes there is awareness, but you don't see it, so you don't see the harm it's doing to the environment. You hear about it but I feel as though if you don't see it, it's not really real. It's the same as like cars, cars are bad to the environment but we still drive them (Consumer 12). | Low value of healthiness and environmental friendliness among consumers | Increase awareness and value of healthiness and environmental friendliness among the majority of consumers |

Source: Developed for this study

The table above demonstrates the barriers and the underlying reasons for those barriers. In addition, it suggests possible approaches to address those problems. There are approaches which suggest adding, increasing, eliminating and reducing components wherever necessary. On the basis of those suggestions, the answers to the four questions of the Four Actions Framework are given. There are four questions designed in the Four Actions Framework (Kim & Mauborgne 2002; Kim & Mauborgne 2015). They are:

1. Which factors should be reduced well below industry standard?

2. Which of the factors that the company takes for granted should be eliminated?
3. Which factors should be created that the industry has never offered?
4. Which factors should be raised well above industry standard?

The Eliminate-Reduce-Raise-Create grid is used to list the answers to the four questions from the Four Actions Framework. Table 17 below is an Eliminate-Reduce-Raise-Create marketing framework designed by this research.

Table 18: Eliminate-Reduce-Raise-Create Grid

| Eliminate | Reduce |
|--|---|
| <ul style="list-style-type: none"> • Improper labelling with substandard certification • Exclusive distribution | <ul style="list-style-type: none"> • Price • Consumer ignorance |
| Raise | Create |
| <ul style="list-style-type: none"> • Intensity of distribution • Range of products • Consumer value of fair wage • Consumer value of disposal and recyclability • Consumer value of healthiness and environmental friendliness • Promotion of durability, comfort and fabric | <ul style="list-style-type: none"> • Colour • Suitable fitting • Fashionable and stylish apparel • Add warranties • Brands |

Source: Developed for the purposes of this study

4.4.1 Eliminate

Within the Four Actions Framework, one of the core questions is, ‘Which of the factors that the company takes for granted should be eliminated?’ After a thorough analysis of eco-apparel and its current market, the researcher has reached a conclusion that eco-apparel companies have been taking for granted that consumers will buy eco-apparel even if they use improper labelling and substandard certification. They also took it for granted that consumers will put more effort into finding eco-apparel stores, which proved to be an incorrect assumption. The use of improper labelling and substandard certification resulted in confusion among consumers, due to complexity in defining and understanding eco-

apparel. Also, the use of substandard certification or no use of certification, raises the question of trust in the quality, originality and credibility of eco-apparel. In the case of distribution, eco-apparel companies have been selling exclusively through only a few stores in a geographical area. They thought even the majority of consumers would find those exclusive stores to buy eco-apparel, just like niche green consumers. But the majority of consumers have shown a different behaviour. They like to buy apparel from convenient places or shopping malls in most cases. As a result, most of the consumers never come across eco-apparel. Thus, eco-apparel should eliminate improper labelling with substandard certification and use a proper label with trusted or standard certificates.

4.4.2 Reduce

The second question put forward by the Four Actions Framework is, 'Which factors should be reduced well below industry standard?' According to the ERRC grid, price and consumer ignorance are two components to be reduced. Eco-apparel products are premium priced. The niche green consumers may ignore the high price of eco-apparel, whereas the majority of consumers consider price as a major factor. They will compare the benefits of the product with the price. As per Table 11, excluding price, there are sixteen key factors that are valuable to the majority of consumers. The value of nine of these factors is of more than average importance for the majority of consumers. Eco-apparel is offering low standards across those nine key factors. The value of the other three factors – health and environmental friendliness, fair wage, and disposal and recyclability – is average or less than average. Eco-apparel is offering more than what is required across these factors. This indicates that eco-apparel companies are investing more in health and environmental friendliness, fair wage, and disposal and recyclability, resulting in the final product being kept at a premium price. Unfortunately, the majority of consumers are not ready to pay premium price for apparel just because it is healthy and environmentally friendly, biodegradable, recyclable and its employees are paid a fair wage. The majority of consumers do not care much about these values. Eco-apparel companies must reduce the price of eco-apparel so that the majority of consumers find the price of the product worth the benefits it offers to them. The

other way to increase the value of eco-apparel among the majority of consumers is to reduce the ignorance of consumers. Eco-apparel can invest in making consumers aware of the benefits of healthy and environmentally friendly apparel, fair wages, and the disposal and recyclability of apparel. This might make the majority of consumers more ready to pay a higher price for eco-apparel.

4.4.3 Create

The third question from the Four Actions Framework is 'Which factor should be created that the industry has never offered? According to the ERRC grid, eco-apparel companies should create colourful eco-apparel with suitable fitting and fashionable styles. So far, eco-apparel companies have been selling dull and monotonous apparel. Eco-apparel has basic and plain colours, while the majority of consumers prefer more colourful and stylish apparel – the complete opposite. To attract the majority of consumers, eco-apparel needs to incorporate these factors. The addition of these features to eco-apparel will increase the overall value of products among the majority of consumers and thus may help overcome the price barrier as well. Further, eco-apparel companies claim their product to be durable, environmentally friendly, healthy and so on, but they do not have any kind of warranty to increase the confidence of consumers. Thus eco-apparel companies can include warranties for their products. Because there is no clear message or understanding of eco-apparel in the market, consumers hesitate to trust eco-apparel. Augmenting eco-apparel with warranties will show that eco-apparel companies are confident of the quality of their products and consumers will also be able to be more confident when choosing eco-apparel. This will be helpful in attracting the majority of consumers, who have never seen or used eco-apparel, to try eco-apparel for the first time. Brand carries a significant value among the majority of consumers, but there is hardly any branding in eco-apparel. Apparel consumers most often choose a particular brand, because they know that the apparel of that brand matches their needs. Also, consumers associate brand with the quality of the product. Thus, eco-apparel should invest in branding and create eco-apparel brands.

4.4.4 Raise

The last question in the Four Actions Framework is, 'Which factors should be raised well above industry standard?' As per the ERRC grid, there are six components which need to be improved by eco-apparel companies. The intensity of distribution is one of them. The majority of eco-apparel companies are selling online. This means that there are very few physical stores. It is very important to have physical stores for apparel because consumers want to see, feel and try apparel before they buy. There are very few physical stores of eco-apparel and most of them are the company's own stores. Such exclusive distribution of eco-apparel has limited the exposure and availability of eco-apparel in the market. Thus eco-apparel companies need to raise the intensity of distribution. The intensity could be increased to selective or intensive distribution, depending upon the capacity of the company. Another factor that needs to be raised is the 'range of products'. Eco-apparel generally has a short range of products. Only the basic range of apparel for a limited demography of consumers is available. Raising the range of products will offer different options and cover a larger segment of consumers. Eco-apparel needs to raise the importance value of fair wage, disposal and recyclability, and healthiness and environmental friendliness among the majority of consumers. The majority of consumers do not find these factors as important as others when buying apparel, which is unfortunate, as eco-apparel is currently investing in or offering very high standards across these factors. There is a huge gap in the majority of consumers' needs and the eco-apparel companies' offerings of eco-apparel. To reduce this gap, eco-apparel needs to raise the importance of fair wage, disposal and recyclability, and healthiness and environmental friendliness among the majority of consumers. The importance of these values can be raised by educating consumers. Once the gap is reduced, these factors will turn out to be the strength of eco-apparel. Lastly, eco-apparel needs to raise the promotion of the durability, comfort and fabric factors. Eco-apparel products are durable, comfortable and use natural fibres which are chemical free. Even the majority of consumers give high importance to the durability, comfort and fabric of apparel. Therefore, these factors are the current strengths of eco-apparel and can give mileage to eco-apparel in attracting the majority of consumers. Thus, eco-apparel companies now need to use these factors

as their unique selling points. Eco-apparel companies should raise the promotion of these benefits of eco-apparel.

4.5 Conclusion

Apparel consumers have been using conventional apparel products for decades. Different types of chemicals are used in the production of such non eco-apparel. Such practices have resulted in environment pollution. Eco-apparel, apparel that is produced in an environmentally friendly way, emerged as an alternative to non-eco-apparel. Eco-apparel consists of products using natural fibres, using natural dyes and most of the time produced using less energy and less water than conventional apparel. However, eco-apparel has not become a prime choice for a majority of apparel users. A proper marketing strategy framework is necessary, which could help eco-apparel companies to design specific marketing strategies to overcome marketing barriers and increase their market. This thesis was designed to develop a marketing strategy framework for eco-apparel that would help eco-apparel overcome its marketing barriers and become a preferred choice for a majority of consumers.

Overall, Chapter 4 has demonstrated the analysis of data collected in this thesis and also presented the findings. The analysis has discovered answers to four research questions proposed by this thesis and finally, developed a marketing strategy framework for eco-apparel. According to the above framework, ideally, eco-apparel should be 'an affordable certified eco-apparel brand that sells colourful, stylish, comfortable, durable, healthy, environmentally friendly, disposable, recyclable apparel with warranties and available in different sizes, ranges, and places'. This framework is a general guideline for the marketing of eco-apparel. Eco-apparel companies can use this framework as a base while making their marketing decisions. All the decisions and activities of eco-apparel marketing can be directed towards the ideal position described by this framework, and this can become the ultimate vision of the eco-apparel companies. However, this research has further raised a need for designing short missions and tactical frameworks to achieve that vision. Moving ahead, Chapter 5, 'Conclusions and implications', will discuss and

compare the results and findings from this Chapter 4 with the literature in Chapter 2. On the basis of the discussion, the conclusion for each research question will be produced. After deriving conclusions, Chapter 5 will describe the theoretical contribution and practical implications of this research. This chapter will also suggest directions for future research.

Chapter 5: Conclusions and implications

5.1 Introduction

The previous chapter provided the results of the data analysis. It demonstrated the overall data analysis and gave answers to the four research questions. This chapter discusses the results of this research in the context of the literature. Further, it addresses the limitations of this study, and advocates guidelines for eco-apparel companies. This chapter is divided into six sections. The first section is the introduction and this section discusses the background of this research and states the importance of this research. This section revisits the research gap, methodologies, theories used in this research and also briefly states the findings of this research. The second section deals with the findings of each research question. The findings for each research question are discussed against the literature. This section will clarify, with reasons, whether or not the results were in agreement or disagreement with the literature. There are four other sub-sections: 5.2.1, 5.2.2, 5.2.3, 5.2.4 which discusses the findings of each research question individually.

The third section of this chapter is 'Implications for theory'. This section discusses the theoretical contributions of this research and how the findings of this research will significantly contribute to the eco-apparel marketing field, strategic marketing and other relevant disciplines.

Moving further ahead, the fourth section deals with the practical implications of the findings of this research. This section shows how eco-apparel managers can use the marketing framework developed by this research while designing a marketing strategy for their products. The fifth section highlights the limitations of this research. Finally, the sixth section gives directions for future research. Overall, this chapter gives a detailed interpretation of the results and their implications.

5.2 Conclusion about research questions

5.2.1 Conclusion about RQ1

RQ1: What are the key factors of competition in the apparel industry?

This research has identified sixteen key factors of competition in the apparel industry. They are: colour, comfort, augmented features, place and distribution, branding, durability, fair wage, fabric, fashion and style, health and environmental friendliness, label with certification, pricing, range, disposal and recyclability, fitting, consumer awareness.

This research agrees with most of the prior studies in regards to key factors of competition in the apparel industry. This research has identified colour as one of the prominent key factors in the apparel industry. This finding is supported by the findings of Forney, Joo Park & Brandon (2005). Forney, Joo Park & Brandon (2005) in their research found that apparel consumers evaluate apparel products on the basis of image, quality, colour/style and design/beauty. According to Skgkao (1994), workmanship, physiological comfort, physical and chemical properties, suitability to individual preference, style and brand are the key components in the apparel market. The finding of this research has again been confirmed by the research of Skgkao (1994). The two key factors, comfort and branding, were once again identified as key factors of the apparel industry by Skgkao. Further, the key factors durability and fitting were identified, and this finding is in agreement with the findings of Abraham-Murali & Littrell (1995), Kuei & Min (1997), Oktay (2006) and (Ellis, McCracken & Skuza 2012). These researchers found that durability, smartness, design, fit, availability, performance and safety are the crucial factors for the success of apparel. Health and environmental friendliness are related to safety or protection of consumers' health and the natural environment. It is agreeable to say that the factor 'health and environmental friendliness' is consistent with the findings of Abraham-Murali & Littrell (1995), Kuei & Min (1997) and Oktay (2006). Further, Chi & Kilduff (2011) found that consumers even considered emotional and social values while buying apparel. Health and environmental friendliness is a kind of emotional and social side of consumers and is thus supported by the findings of

Chi & Kilduff (2011). Pricing is a factor that has already been identified as a key factor by Chi & Kilduff (2011). Place and distribution, and range of products are two other key factors of competition identified. Place and distribution, and range of product are the components of 'availability of a product'. Previous studies have mentioned that availability is one crucial factor for the success of the apparel industry (Abraham-Murali & Littrell 1995; Kuei & Min 1997; Oktay 2006). This research has found consumer awareness as one of the key factors of competition and thus is in agreement with Blackwell, Miniard & Engel (2001). Blackwell, Miniard & Engel (2001) said that the way consumers choose key factors reflects their values, lifestyle, attitudes, knowledge and experience. Knowledge and experience are somehow relevant to consumer awareness. Consumer awareness is all about educating and informing consumers about the products. (Gam et al. 2010) also said that fabric softness determines the choice of products among eco-apparel consumers and fabric is another key factors of competition identified by this study.

This research has further identified new key factors of competition in the apparel industry, in addition to the factors in the literature that have been confirmed by this study. In addition to factors in the extant literature, this research has found that in today's context, the apparel industry must focus on additional key factors of competition. They are: augmented features, fair wage, label with certification, disposal and recyclability.

5.2.2 Conclusion about RQ2

RQ2: How does eco-apparel perform across the key factors of competition of the apparel industry?

The performance of eco-apparel across key factors of competition was analysed using the Strategy Canvas (Kim & Mauborgne 2005d). This approach has not been so far used in the context of eco-apparel. So, this is an innovative step taken by this study. Colour, augmentation, place and distribution, branding, fashion and style, range, labelling with certification, fitting and consumer awareness are the factors where eco-apparel is performing lower than customers expect. On the other hand, fair wage, healthiness and environmental friendliness, comfort, durability, fabric,

pricing, disposal and recyclability are the key factors where eco-apparel is performing either up to the expectation of consumers, or more than expected. Previous literature generally described evaluating the factors that consumers value, as one of the best ways of achieving success in the market (Forney, Joo Park & Brandon 2005), however, there has not been sufficient work done in evaluating the performance of eco-apparel across the key factors of competition.

5.2.3 Conclusion about RQ3

RQ3: What are the marketing barriers of eco-apparel and how can they be classified?

Table 19: Discussion of marketing barriers in reference to previous literature

| Marketing barriers identified by this research | Classification of barrier | Marketing barriers found by previous research | Inference |
|---|---------------------------|--|---|
| Dull and monotonous | Product related barrier | Lack of design (Ottman, Stafford & Hartman 2006) | Used different approach, because there are designs but those designs use dull and monotonous colours |
| Improper labelling with substandard certification | Product related barrier | Lack of trust(Ottman, Stafford & Hartman 2006) | Current research agrees that there is lack of trust but this arises because of improper labelling and substandard certification |
| Unsuitable fitting | Product related barrier | Fit is a predicting factor (Joan L. Ellis et al. 2012) | Previous literature has mentioned fit as a key factor but did not clearly mention whether it is a barrier for eco-apparel purchase. This research evaluated unsuitable fitting of eco-apparel as one of the marketing barriers. |
| Unfashionable and unstylish | Product related barrier | The lack of design,(Ottman, Stafford & Hartman 2006) | This research disagrees that lack of design is a marketing barrier. It has found that there is eco-apparel with designs and styles; however, those |

| | | | |
|--|---------------------------|---|---|
| | | | designs are unfashionable and unstylish. So, unfashionable and unstylish eco-apparel are the barriers of eco-apparel. |
| No warranties | Product related barriers | Lack of trust(Ottman, Stafford & Hartman 2006) | This research agrees that consumers are sceptical about the performance of eco-apparel. However, this could be reduced by adding some augmented features like warranties to their products. But eco-apparel products do not have any warranties on them. Thus, having no warranties is the main marketing barrier to eco-apparel. |
| Short range of products | Product related barrier | Restricted availability of products (Ottman, Stafford & Hartman 2006), (Connell 2010) | Researchers have not clearly mentioned whether it even relates to different ranges of products; however, this research clearly identifies that a short range of products is another marketing barrier |
| Exclusive distribution | Place related barrier | Restricted availability of products(Ottman, Stafford & Hartman 2006), (Connell 2010) | The two pieces of literature suggested that restricted availability is a marketing barrier. However, this research further extended this barrier and revealed that eco-apparel products are being distributed exclusively, which restricts their availability. Thus exclusive distribution is another marketing barrier to eco-apparel. |
| Healthiness and environment friendliness | Promotion related barrier | Trials have been undertaken to overcome the negative effect of the high retail prices of products in the eco-apparel sector | Previous literature suggest that environmental factors can be the strength of eco-apparel, but this research indicates that |

| | | | |
|----------------------------|---------------------------|--|---|
| | | (Kaas 1993) by highlighting the environmental superiority of the products (Meffert & Kirchgeorg 1998). | eco-apparel is offering more than consumers expect in this factor and this makes excess promotion of healthiness and environmental friendliness another barrier to eco-apparel. |
| Fair wage | Promotion related barrier | There is no particular literature on this barrier | Fair wage is an emerging factor in apparel purchase. Very few consumers value this factor, while eco-apparel is focussing more on fair wage and promoting more about this factor. But very few consumers care about fair wage, so such promotions and claims are becoming marketing barriers to eco-apparel. Consumers may build a perception that fair wage products are expensive. |
| Disposal and recyclability | Promotion related barrier | Trials have been undertaken to overcome the negative effect of the high retail prices of products in the eco-apparel sector (Kaas 1993) by highlighting the environmental superiority of the products (Meffert & Kirchgeorg 1998). | Previous researchers considered environmental features such as disposal and recyclability as strengths of eco-apparel, however, this research suggests that over promotion of such factors is a marketing barrier to eco-apparel because general consumers are more concerned about other features of apparel rather than environmental superiority. Along with such features, eco-apparel should focus on satisfying other prime reasons for buying apparel. |
| Low branding | Promotion related barrier | Consumers tend to find it difficult to differentiate green brands from other | This research and previous literature are in agreement that low branding is a |

| | | | |
|---------------------------|---------------------------|---|--|
| | | products (Ottman, Stafford & Hartman 2006) | marketing barrier to eco-apparel. |
| Consumer ignorance | Promotion related barrier | Limited information, lack of trust(Ottman, Stafford & Hartman 2006), and positive attitudes are cultivated when the promotional message of an eco-brand contains extended or explicit information (Yan, Hyllegard & Blaesl 2012b) | Limited information, lack of trust, explicit information sharing are all relevant to consumer ignorance. |
| Premium pricing | Price related barrier | Consumers are often not prepared to pay higher prices for eco-apparel (Gam et al. 2010). The premium price levels of eco-apparel products weakens the tendency of consumers to make positive eco-apparel consumption decisions (Chan & Wong 2012) | Premium pricing has already been established as one of the barriers to eco-apparel by different researchers. |

Source: Developed for the purpose of this study

The above Table, 18, demonstrates all the marketing barriers identified by this research in the first column. The second column classified these barriers according to the 4Ps of marketing mix. The third column is a list of previous literature or findings in regards to the marketing barriers of the first column, and finally, the fourth column, 'Inference', analyses the similarities and differences between the results of this research and those from previous research.

This research has found that dull and monotonous products, improper labelling with substandard certification, unsuitable fitting, unfashionable and unstylish products, and no warranties, are the product-related barriers to eco-apparel. Exclusive distribution is a place-related barrier. Healthiness and environmental friendliness, fair wage, disposal and recyclability, low branding, and consumer ignorance are the promotion-related barriers. Finally, premium pricing is the price-

related barrier to eco-apparel. Such classification of eco-apparel marketing barriers has not previously been done by researchers.

From Table 18, it is evident that this research is in agreement with the findings of previous research. This research agrees that there is a lack of trust (Ottman, Stafford & Hartman 2006), but further analysis revealed that there is a lack of trust because of improper labelling and substandard certification. Thus, improper labelling with substandard certification is an extension of a lack of trust as a marketing barrier. Moreover, consumers said they would be ready to buy eco-apparel if the industry provided warranties for their products. But eco-apparel products do not have any warranties. Thus, having no warranties is the main marketing barrier to eco-apparel. Low branding is another marketing barrier found by previous literature (Ottman, Stafford & Hartman 2006) and it is confirmed by this research as well. Further, previous researchers identified limited information, lack of trust (Ottman, Stafford & Hartman 2006), and limited information (Yan, Hyllegard & Blaesl 2012b) as marketing barriers to eco-apparel and all these barriers are relevant to consumer ignorance, a marketing barrier indicated by this research. Premium pricing has been considered as a marketing barrier to eco-apparel by this research as well as by other, multiple researchers (Chan & Wong 2012; Gam et al. 2010).

Not all the factors recognised by this research are completely similar to the findings of previous literature. This research has redefined 'lack of design' (Ottman, Stafford & Hartman 2006) and says that there are eco-apparel products with designs; however those designs are unfashionable and unstylish. Those designs use dull and monotonous colours. So, dull and monotonous, unfashionable and unstylish are the other two marketing barriers according to this research. Previous research did not clearly mention whether fit was a barrier to eco-apparel purchase. This research has diagnosed 'unsuitable fitting' of eco-apparel as one of the marketing barriers. Previous research has said that restricted availability of products (Connell 2010) is one of the marketing barriers, but researchers have not clearly mentioned if this factor even relates to availability of different ranges of products; however, this

research clearly identified that a short range of products is another marketing barrier. This research further extended the understanding of the restricted availability barrier and revealed that eco-apparel products are not easily available because of exclusive distribution. Thus, exclusive distribution is another marketing barrier for eco-apparel.

There are few marketing barriers suggested by this research which contradict findings from previous literature. Previous literature has suggested that ethical and environmental factors are strengths of eco-apparel (Meffert & Kirchgeorg 1998), but this research has indicated that eco-apparel is offering more than consumers expect in terms of this factor and this excess promotion of healthiness and environmental friendliness, fair wage, disposal and recyclability related features of eco-apparel constitutes another barrier to eco-apparel. Besides, fair wage is an emerging factor in apparel purchase. Very few consumers value this factor. Generally consumers are more concerned about other features of apparel rather than environmental superiority.

5.2.4 Conclusion about RQ4

RQ4: What marketing framework could be developed to overcome the barriers faced by eco-apparel?

Table 20: Findings and discussion of marketing framework

| Actions advised by marketing framework in this research | Literature |
|--|---|
| Eliminate: <ol style="list-style-type: none"> 1. Improper labelling with substandard certification 2. Exclusive distribution | <ol style="list-style-type: none"> 1. Previous literature has identified restricted availability and lack of trust as barriers but has not suggested any action plan. |
| Raise: <ol style="list-style-type: none"> 1. Intensity of distribution 2. Range of products 3. Consumer Value of fair wage 4. Consumer value of disposal and recyclability 5. Consumer value of healthiness and environmental friendliness | <ol style="list-style-type: none"> 1. Integrating environmental concerns as a competitive strategy (Menon & Menon 1997) 2. Aggressive public relations campaigns (Wong, Turner & Stoneman 1996) |

| | |
|--|---|
| 6. Promotion of durability, comfort and fabric | |
| Reduce <ol style="list-style-type: none"> 1. Price 2. Consumer ignorance | <ol style="list-style-type: none"> 1. Aggressive penetration pricing 2. Aggressive public relation campaigns (Wong, Turner & Stoneman 1996) 3. Sharing of explicit information can create positive attitudes towards an eco-brand (Mukherjee & Onel 2013; Yan, Hyllegard & Blaesl 2012a) |
| Create <ol style="list-style-type: none"> 1. Colour 2. Suitable fitting 3. Fashionable and stylish apparel 4. Add warranties 5. Brands | <ol style="list-style-type: none"> 1. Previous literature approved lack of design as a marketing barrier but did not propose any action plan. |

Source: Developed for this thesis

Finally, the Four Actions Framework was used to develop a marketing framework for eco-apparel (Kim & Mauborgne 2002). The Four Actions Framework has not been used so far in the context of eco-apparel. The use of this strategic tool is an innovative approach developed in this research. The framework suggests that eco-apparel should eliminate improper labelling with substandard certification and exclusive distribution. Previous research was on general eco-products. There is very little literature specific to eco-apparel. Earlier researchers have restricted availability and lack of trust (Connell 2010; Ottman, Stafford & Hartman 2006) as marketing barriers to eco-apparel but have not suggested any particular action plan. Menon & Menon (1997) previously explored that integrating environmental concerns can be a competitive strategy and Wong, Turner & Stoneman (1996) advised that aggressive public relations campaigns are necessary to grow eco-products. However, these researchers did not suggest any specific framework. This research has further extended the view and suggested raising the value of environmental factors such as disposal and recyclability; healthiness and environmental friendliness will help increase the market of eco-apparel. Further, in

agreement with the need for aggressive campaigns, this research has suggested the need for raising the value of fair wage, promotion of durability, comfort and fabric. Further, this research has indicated the necessity to create brands, and to reduce consumer ignorance, which is relevant to aggressive campaigns (Wong, Turner & Stoneman 1996) and the need for the sharing of explicit information (Mukherjee & Onel 2013; Yan, Hyllegard & Blaesi 2012a). Also this research has indicated the need for adding warranties to eco-apparel products. Similarly, earlier scholars generally identified that eco-apparel lacked design, but did not specifically highlight any action plan. This research has suggested adding more colours to eco-apparel products, creating more fashionable and stylish apparel, and designing suitable fittings.

5.3 Implications for theory

The two strategic tools applied in this research; the Strategy Canvas and the Four Actions Framework, were developed by Kim & Mauborgne (2002, 2015). Most of the time, these two tools have been applied to service industry research (Kim & Mauborgne 2002). The application of these two tools to the eco-apparel industry by this research is an innovative approach which brings in a different angle to the analysis of competition in the eco-apparel industry; something that has not been done before. These two tools were originally devised to innovate a value curve and develop a blue ocean strategy for a product or service. Blue ocean strategy is a strategy to develop a completely new market, uncontested market space free of competition, which is opposite to red ocean strategy (Kim & Mauborgne 2005b). Red ocean strategy refers to designing a competitive strategy to compete, benchmarking competitors and fighting in an existing market (Kim & Mauborgne 2005c). This research has used the Strategy Canvas and the Four Actions Framework to design a marketing strategy framework to be able to compete in an existing apparel market. This demonstrates that these two tools are equally efficient in developing Red Ocean Strategy as they are in developing Blue Ocean Strategy.

The Strategy Canvas was used to in this research to visualize the performance of eco-apparel across key factors of competition, the factors that are valuable to apparel consumers. Further, customer satisfaction equation was used to calculate the gap between consumers' expectations and eco-apparel performance. This research has proved that customer satisfaction equation can be used as an extension of Strategy Canvas to evaluate customer satisfaction, especially when the data is qualitative in nature. The Strategy Canvas thus designed can be named as Customer Satisfaction Evaluation Canvas. The use of the Strategy Canvas in customer satisfaction evaluation further helped to identify marketing barriers of eco-apparel. Overall, this extended use of the Strategy Canvas has contributed to the body of work on market analysis and on the overall parent theory of marketing strategy. The major theoretical contribution of this research is the development of a marketing strategy framework for eco-apparel using the Strategy Canvas and the Four Actions Framework.

5.4 Implications for apparel industry managers

Eco-apparel has not been able to attract the vast majority of consumers, compared to conventional apparel. According to the literature review done in this research, there is no proper marketing strategy framework for eco-apparel. This research tackled eco-apparel marketing from a different angle. The framework developed by this research can provide new dimensions for eco-apparel marketing. The framework clearly indicates the components that eco-apparel companies should eliminate, reduce, raise and create. This framework has provided a pathway that can lead towards a major apparel market. Eco-apparel managers can keep the individual actions as milestones to be achieved and can devise specific marketing tactics directed towards those milestones. This research further explains that although environmental components of eco-apparel are the strengths of eco-apparel, generally consumers are more concerned about other factors such as colour, style, and price. So, eco-apparel managers can keep eco-factors as an added value of eco-apparel but must not compromise on other components. Eco-apparel managers need to invest more in educating consumers and increasing the

understanding as well as the credibility of eco-apparel. All such specific action plans can be found in the Four Actions Framework. Eco-apparel managers can use the marketing strategy framework created by this research.

5.5 Limitations

The strength of this research is that it has used both primary and secondary data sources. Also, interview data were collected from both managers and consumers. Such a process of using different sources of data and different interview participants is called data triangulation. Further, the interviews were undertaken using a general interview guide. There are some limitations associated with this research. The interviewee participants in this research were all from within Australia. The socio-economic circumstances of populations vary between countries. Thus, the findings may not directly reflect the feelings of populations from other countries. Further the purposive sampling method was used in this research. The participants were selected based on the researcher's ideas. Thus it might again be difficult to generalise the findings of this research to a larger population. However, the researcher has used data triangulation to increase the richness of data and an interview guide to avoid bias.

5.6 Directions for future research

This research has given a general marketing strategy framework for eco-apparel. The actions suggested are general guidelines and do not explicitly explain the specific marketing tactics or activities. Thus, further research can be done to devise those specific marketing tactics. For example, this research says that eco-apparel should reduce exclusive distribution. Future research can be done to design an appropriate distribution strategy for eco-apparel. There could be several inquiries based on the marketing strategy framework given by this research. Some of them might be:

1. How can we design certified labels for eco-apparel?

2. How can we increase the value of fair wage, health and environmental friendliness among consumers?
3. How can we promote key strengths of eco-apparel, such as comfort, durability, fabric?
4. How can we add warranty to eco-apparel?
5. How can we reduce the price of eco-apparel? What pricing strategy would be the best for eco-apparel?

The scope of this research can be expanded to the international market. This research was conducted among Australian companies and populations; new research can include companies and consumers from different countries. The overall research is qualitative in nature and uses qualitative data and analysis methods. In future, scholars could conduct a questionnaire survey and collect quantitative data to further validate the findings of this research.

References

Abraham-Murali, L & Littrell, M 1995, 'Consumers' perception of apparel quality over time: An exploratory study', *Clothing and Textile Research Journal*, vol. 13, no. 3, pp. 149-58.

Akin, D, Himmelsbach, D & Morrison, WH, III 2000, 'Biobased Fiber Production: Enzyme Retting for Flax/Linen Fibers', *Journal of Polymers and the Environment*, vol. 8, no. 3, pp. 103-9.

Andersen, MM 2007, *Eco-innovation indicators*, European Environment Agency.

Anderson, EW & Sullivan, MW 1993, 'The Antecedents and Consequences of Customer Satisfaction for Firms', *Marketing Science*, vol. 12, no. 2, pp. 125-43.

Angen, M 2000, 'Evaluating interpretive inquiry: Reviewing the validity debate and opening the dialogue', *Qualitative Health Research*, vol. 10, no. 3, pp. 378-95.

Ansoff, I 1965, *Corporate Strategy*, McGraw-Hill, New York, NY.

Armstrong, G & Kotler, P 2005, *Marketing: An Introduction*, Seventh edn, Prentice Hall, Upper Saddle River, NJ.

Asian Productivity Organisation 2012, *For sustainable production & consumption, Eco-Products directory 2012*, Asian Productivity Organization, Japan, 978-92-833-2436-2.

Atilgan, T 2007, 'ECO-labelling applications in the textile & apparel sector in Turkey', *Fibres and Textiles in Eastern Europe*, vol. 15, no. 2, p. 14.

Azevedo, S, Pereira, M, Ferreira, J & Miguel, R 2009, 'FASHION MARKETING & THEORY: Chapter 5: FACTORS THAT INFLUENCE THE CLOTHES'BUYING DECISION', in *FASHION MARKETING & THEORY*, pp. pages 55-63.

Balderjan, I 1988, 'Personality variables and environmental attitudes as predictors of ecologically responsible consumption patterns', *Journal of Business Research*, vol. 17, no. 1, pp. 51-6.

Bartels, R 1988, *The History of Marketing Thought*, 3 edn, Publishing Horizons, Columbus, OH.

Beard, ND 2008, 'The branding of Ethical Fashion and the consumer: A luxury niche or mass market reality', *The journal of Dress body and Culture*, vol. 12, no. 4, pp. 447-68.

Berchicci, L & Bodewes, W 2005, 'Bridging environmental issues with new product development', *Business Strategy & the Environment (John Wiley & Sons, Inc)*, vol. 14, no. 5, pp. 272-85.

Bergen, M & Peteraf, MA 2002, 'Competitor Identification and Competitor Analysis: A Broad-Based Managerial Approach', *Managerial & Decision Economics*, vol. 23, no. 4/5, pp. 157-69.

- Bhardwaj, V & Fairhurst, A 2010, 'Fast fashion: response to changes in the fashion industry', *The International Review of Retail, Distribution and Consumer Research*, vol. 20, no. 1, pp. 165-73.
- Bhate, S & Lawler, K 1997, 'Environmentally friendly products: factors that influence their adoption', *Technovation*, vol. 17, no. 8, pp. 457-65.
- Blackwell, R, Miniard, P & Engel, J 2001, *Consumer Behavior*, 9 edn, South-Western Thomson Learning, Cincinnati, OH.
- Bloor, M & Wood, F 2006, *Keywords in qualitative methods: A vocabulary of research concepts*, Sage.
- Bodimeade, M 2013, 'Global Apparel Industry', *Yahoo Finance*.
- Bogdan, R & Biklin, S 1998, *Qualitative research for education: An introduction to theory and methods*, 3 edn, Allyn and Bacon, Boston.
- Bowen, GA 2008, 'Naturalistic inquiry and the saturation concept: a research note', *Qualitative research*, vol. 8, no. 1, pp. 137-52.
- Boyce, C & Neale, P 2006, *Conducting in-depth interviews: A guide for designing and conducting in-depth interviews for evaluation input*, Pathfinder International Watertown, MA.
- Braun, V & Clarke, V 2006, 'Using Thematic Analysis in Psychology Qualitative Research in Psychology', *Qualitative Research in Psychology*, vol. 3, no. 2, pp. 77-101.
- Butler, S & Francis, S 1997, 'The effects of environmental attitudes on apparel purchasing behavior', *Clothing and Textiles Research Journal*, vol. 15, no. 2, pp. 76-85.
- Camp, R 1989, *Benchmarking: the search for industry best practices that lead to superior performance*, Quality Press, Milwaukee, Wis.
- Cantor, A & Stochlic, RS 2009, *Breaking down market barriers for small and mid-sized organic growers*, California Institute for Rural Studies.
- Carrington, M, Neville, B & Whitwell, G 2010, 'Why Ethical Consumers Don't Walk Their Talk: Towards a Framework for Understanding the Gap Between the Ethical Purchase Intentions and Actual Buying Behaviour of Ethically Minded Consumers', *Journal of Business Ethics*, vol. 97, no. 1, pp. 139-58.
- Chan, T & Wong, C 2012, 'The consumption side of sustainable fashion supply chain: Understanding fashion consumer eco-fashion consumption decision', *Journal of Fashion Marketing and Management*, vol. 16, no. 2, pp. 193-215.
- Cherrier, H 2007, 'Ethical consumption practices: co-production of self-expression and social recognition', *Journal of Consumer Behaviour*, vol. 6, no. 5, pp. 321-35.

- Cheshire, L 2009, *Archiving qualitative data: Prospects and challenges of data preservation and sharing among Australian qualitative researchers*, The Australian Qualitative Archive, Institute for Social Science Research, University of Queensland. Available at: http://www.assda.edu.au/forms/AQuAQualitativeArchiving_DiscussionPaper_FinalNov09.pdf [Accessed 16 September 2012].
- Chevalier, JA & Mayzlin, D 2006, 'The effect of word of mouth on sales: Online book reviews', *Journal of marketing research*, vol. 43, no. 3, pp. 345-54.
- Chi, T & Kilduff, PPD 2011, 'Understanding consumer perceived value of casual sportswear: An empirical study', *Journal of Retailing and Consumer Services*, vol. 18, no. 5, pp. 422-9.
- Clarke, T & Clegg, S 2000, *Changing Paradigms*, Longman, Sydney.
- Cohen, L & Manion, L 1994, *Research methods in education*, 4 edn, Routledge, London.
- Cohen, L, Manion, L & Morrison, K 2007, *Research Methods in Education*, Routledge/Falmer, London.
- Connell, KYH 2010, 'Internal and external barriers to eco-conscious apparel acquisition', *International Journal of Consumer Studies*, vol. 34, no. 3, pp. 279-86.
- Constantinides, E 2006, 'The marketing mix revisited: towards the 21st century marketing', *Journal of Marketing Management*, vol. 22, no. 3-4, pp. 407-38.
- Corti, L, Day, A & Backhouse, G 2000, 'Confidentiality and informed consent: Issues for consideration in the preservation of and provision of access to qualitative data archives', in *Forum Qualitative Sozialforschung/Forum: Qualitative Social Research*, vol. 1.
- Council, SB 2014, 'What is Fairtrade?'
- Court, DC 2004, 'A new model for marketing', *McKinsey Quarterly*, no. 4, pp. 4-5.
- Cowe, R & Williams, S 2000, 'Who are the ethical consumers', *Co-operative Bank, Manchester*.
- Crawford, M & Di Benedetto, A 2008, *New products management*, vol. 9, McGraw Hill, Irwin.
- Creswell, J 2003, *Research design: Qualitative, quantitative, and mixed methods approaches*, 2nd edn, Sage, Thousand Oaks.
- 2007, *Qualitative inquiry & research design: Choosing among five approaches* Sage, Thousand Oaks, CA.
- Creswell, JW 2012, *Qualitative inquiry and research design: Choosing among five approaches*, Sage publications.
- Culliton, J 1948, 'The Management of Marketing Costs', Harvard University.

D'Souza, C, Taghian, M & Lamb, P 2006, 'An empirical study on the influence of environmental labels on consumers', *Corporate Communications: An International Journal*, vol. 11, no. 2, pp. 162-73.

Davies, D & Dodd, J 2002, 'Qualitative research and the question of rigor', *Qualitative Health Research*, vol. 12, no. 2, pp. 279-89.

Davis, K 1961, *Marketing Management*, Ronald Press, New York, NY.

De Carli, M, Olesen, BW, Zarrella, A & Zecchin, R 2007, 'People's clothing behaviour according to external weather and indoor environment', *Building and Environment*, vol. 42, no. 12, pp. 3965-73.

Denscombe, M 2000, *The Good Research Guide for Small Scale Social Research Projects*, Taylor & Francis.

Déri, E 2013, 'Challenges of environmental and social responsibility in the fashion industry', Masters thesis, Uppsala University.

DeSantis, L & Ugarriza, DN 2000, 'The concept of theme as used in qualitative nursing research', *Western Journal of Nursing Research*, vol. 22, no. 3, pp. 351-72.

Dickson, MA 2000, 'Personal Values, Beliefs, Knowledge, and Attitudes Relating to Intentions to Purchase Apparel from Socially Responsible Businesses', *Clothing and Textiles Research Journal*, vol. 18, no. 1, pp. 19-30.

Dunford, M 2004, 'The changing profile and map of the EU textile and clothing industry', *European Industrial Restructuring in a Global Economy: Fragmentation and Relocation of Value Chains. SOFI Berichte: Göttingen*.

Eggenberger, S & Nelms, T 2007, 'Family interviews as a method for family research', *Journal of Advanced Nursing*, vol. 58, no. 3, pp. 282-92.

Ellis, JL, McCracken, VA & Skuza, N 2012, 'Insights into willingness to pay for organic cotton apparel', *Journal of Fashion Marketing and Management: An International Journal*, vol. 16, no. 3, pp. 290-305.

Elwood, SA & Martin, DG 2000, "'Placing" interviews: location and scales of power in qualitative research', *The Professional Geographer*, vol. 52, no. 4, pp. 649-57.

Erdumlu, N & Ozipek, B 2008, 'Investigation of regenerated bamboo fibre and yarn characteristics', *Fibres & textiles in eastern europe*, vol. 16, no. 4, pp. 43-7.

Fashion United *Global Fashion Industry Statistics - International Apparel*, viewed 16 January 2015, <<http://www.fashionunited.com/global-fashionindustry-statistics-international-apparel>>.

Ferrell, O & Hartline, M 2011, *Marketing Strategy*, vol. fifth Cengage learning, USA.

Finisterra do Paço, AM, Barata Raposo, ML & Filho, WL 2009, 'Identifying the green consumer: A segmentation study', *Journal of Targeting, Measurement & Analysis for Marketing*, vol. 17, no. 1, pp. 17-25.

Flowerdew, R & Martin, D 2005, *Methods in Human Geography: A Guide for Students Doing a Research Project*, Prentice Hall.

Foley, J, DeFries, R, Asner, G, Barford, C, Bonan, G, Carpenter, S, Chapin, F, Coe, M, Daily, G, Gibbs, H, Helkowski, J, Holloway, T, Howard, E, Kucharik, C, Monfreda, C, Patz, J, Prentice, I, Ramankutty, N, Snyder, P & 2005, 'Global Consequences of Land Use', *Science*, vol. 309 no. 5735, pp. 570-4.

Forney, JC, Joo Park, E & Brandon, L 2005, 'Effects of evaluative criteria on fashion brand extension', *Journal of Fashion Marketing and Management: An International Journal*, vol. 9, no. 2, pp. 156-65.

Forrester, JW 1959, 'ADVERTISING: a Problem in Industrial Dynamics', *Harvard Business Review*, vol. 37, no. 2, pp. 100-10.

Frankfort-Nachmias, C & Nachmias, D 2008, *Research Methods in the Social Sciences*, Worth Publishers.

Frey, A 1961, *Advertising*, 3 edn, The Ronald Press, New York.

Gall, M, Gall, J & Borg, W 2003a, *Educational research: An introduction*, 7th edn, Allyn-Bacon, Boston.

— 2003b, *Educational research: An introduction*, A & B Publications, Boston, MA.

Gam, HJ 2011, 'Are fashion-conscious consumers more likely to adopt eco-friendly clothing?', *Journal of Fashion Marketing and Management*, vol. 15, no. 2, pp. 178-93.

Gam, HJ, Cao, H, Farr, C & Kang, M 2010, 'Quest for the eco-apparel market: a study of mothers' willingness to purchase organic cotton clothing for their children', *International Journal of Consumer Studies*, vol. 34, no. 6, pp. 648-56.

Gay, L & Airasian, P 2000, *Educational research: Competencies for analysis and application*, Six edn, Prentice Hall, Upper Saddle River, NJ.

Ghuri, PN & Grønhaug, K 2005, *Research methods in business studies: A practical guide*, Pearson Education.

Given, LM 2008, *The Sage Encyclopedia of Qualitative Research Methods: A-L ; Vol. 2, M-Z Index*, SAGE.

Goi, CL 2009, 'A Review of Marketing Mix: 4Ps or More?', *International journal of marketing studies*, vol. 1, pp. 2-15.

Goswami, P 2008, 'Is the urban Indian consumer ready for clothing with eco-labels?', *International Journal of Consumer Studies*, vol. 32, no. 5, pp. 438-46.

- Grbich, C 2012, *Qualitative data analysis: An introduction*, Sage.
- Green, J, Draper, A & Dowler, E 2003, 'Short cuts to safety: risk and 'rules of thumb'in accounts of food choice', *Health, risk & society*, vol. 5, no. 1, pp. 33-52.
- Guba, E & Lincoln, Y (eds) 1994, *Competing paradigms in qualitative research*, Handbook of qualitative research, Sage, London.
- Gulrajani, M 2001, 'Present status of natural dyes', *Indian Journal of Fibre and Textile Research*, vol. 26, no. 1/2, pp. 191-201.
- Gungor, A & Gupta, SM 1999, 'Issues in environmentally conscious manufacturing and product recovery: a survey', *Computers & Industrial Engineering*, vol. 36, no. 4, pp. 811-53.
- Hammersley, M & Atkinson, P 1995, *Ethnography: Principles in Practice*, Routledge, London.
- Harrison, R, Newholm, T & Shaw, D 2005, *The ethical consumer*, SAGE, London.
- Helavirta, S 2007, 'Lasten tutkimushaastattelun. Metodologista herkistymistä, joustoa ja tasapainottelua [Research interviews with children. Methodological sensitivity, flexibility and balancing]', *Yhteiskuntapolitiikka*, vol. 72, no. 6, pp. 629-40.
- Hering, L & Hering, H 2010, *How to Write Technical Reports*, Springer, Heidelberg.
- Hines T & Bruce M 2007, *Fashion Marketing Contemporary issues*, second edn, Elsevier Ltd, The Netherlands.
- Hox, JJ & Boeije, HR 2005, 'Data collection, primary vs. secondary', *Encyclopedia of social measurement*, vol. 1, pp. 593-9.
- Jacobs, H 2012, 'Reaping the benefits of value innovation: Lessons for small agribusinesses in Africa', *African Journal of Business Management*, vol. 6, no. 33, pp. 9510-23.
- Jaffe, A, Newell, R & Stavins, R 2005, 'A tale of two market failures: Technology and environmental policy', *Ecological Economics*, vol. 54, no. 2-3, pp. 164-74.
- Joan L. Ellis, A., V, McCracken & N, S 2012, 'Insights into willingness to pay for organic cotton apparel', *Journal of Fashion Marketing and Management*, vol. 16, no. 30, pp. 290-305.
- Joergens, C 2006, 'Ethical fashion: myth or future trend?', *Journal of Fashion Marketing and Management*, vol. 10, no. 3, pp. 360-71.
- Josephine, P-B & Ritsuko, O 2008, 'Pro-environmental products: marketing influence on consumer purchase decision ', *Journal of Consumer Marketing*, vol. 25, no. 5 pp. 281–93.
- Kaas, K (ed.) 1993, *Information problems on markets for green products*, Business and Environmental Protection, Stuttgart.

- Keefe, L 2004, 'What is the meaning of 'marketing'?', *Marketing News*, September 15, pp. 17-8.
- Ketelhöhn, W 1998, 'What is a key success factor?', *European Management Journal*, vol. 16, no. 3, pp. 335-40.
- Khalifa, AS 2009, 'Drawing on students' evaluation to draw a strategy canvas for a business school', *International Journal of Educational Management*, vol. 23, no. 6, pp. 467-83.
- Kim, H & Damhorst, M 1999, 'Environmental attitude and commitment in relation to admessage credibility', *Journal of Fashion Marketing and Management*, vol. 3, no. 1, pp. 18-30.
- Kim, W & Mauborgne, R 1999, 'Strategy, value innovation, and the knowledge economy', *Sloan Management Review*, vol. 40, no. 3, pp. 41-54.
- Kim, WC & Mauborgne, R 2002, 'Charting you company's future', *Harvard Business Review*, vol. June, pp. 77-83.
- 2004, 'Blue Ocean Strategy', *Harvard Business Review*.
- Kim, WC & Mauborgne, R 2005a, 'Blue ocean strategy', *California management review*, vol. 47, no. 3, pp. 105-22.
- Kim, WC & Mauborgne, R 2005b, *Blue ocean strategy, How to create uncontested market space and make the competition irrelevant*, Harvard Business School Press, Boston, Massachusetts.
- 2005c, 'Blue Ocean Strategy: FROM THEORY TO PRACTICE', *California management review*, vol. 47, no. 3, pp. 105-21.
- 2005d, 'Value innovation: a leap into the blue ocean', *Journal of business strategy*, vol. 26, no. 4, pp. 22-8.
- Kim, WC & Mauborgne, R 2015, *Blue Ocean Strategy, Expanded Edition: How to Create Uncontested Market Space and Make the Competition Irrelevant*, Harvard Business Review Press, Boston, Massachusetts
- Klonsky, K & Tourte, L 1998a, 'Organic Agricultural Production in the United States: Debates and Directions', *American Journal of Agricultural Economics*, vol. 80, no. 5, p. 1119.
- 1998b, 'Organic agricultural production in the United States: Debates and directions', *American Journal of Agricultural Economics*, pp. 1119-24.
- Kobayashi, H 2005, 'Strategic evolution of eco-products: a product life cycle planning methodology', *Research in Engineering Design*, vol. 16, no. 1-2, pp. 1-16.
- Kotler, P 1967, *Marketing Management: Analysis, Planning, and Control*, Prentice Hall, Englewood Cliffs, New Jersey.

- Kotler, P 2011, 'Reinventing Marketing to Manage the Environmental Imperative', *Journal of Marketing*, vol. 75, no. 4, pp. 132-5.
- Kotler, P & Armstrong, G 2009, *Principles of marketing*, 13 edn, Pearson Education, USA.
- Kotler, P & Armstrong, G 2012, *Principles of Marketing* Fourteen edn, Pearson Prentice Hall, New Jersey.
- Kotler, P, Armstrong, G, Saunders, G & Wong, V 1999, *Principles of marketing*, vol. Second, Prentice Hall Europe, Italy.
- Kotler, P & Keller, K 2009, *Marketing Management*, Thirteen edn, PHI Learning Private Limited, New Delhi.
- Krueger, RA & Casey, MA 2000, *Focus Groups: A Practical Guide for Applied Research*, SAGE Publications.
- Kumar, A, Antony, J & Dhakar, T 2006, 'Integrating quality function deployment and benchmarking to achieve greater profitability', *Benchmarking: An International Journal*, vol. 13, no. 3, pp. 290-310.
- Lambert, M 2014, 'The Lowest Cost at Any Price: The Impact of Fast Fashion on the Global Fashion Industry', Lake Forest College.
- Landrigan, M 1999, 'Improving Your Measurement of Customer Satisfaction:: A Guide to Creating, Conducting, Analyzing and Reporting Customer Satisfaction Measurement Programs', *Journal of Consumer Marketing*, vol. 16, no. 4, pp. 1-4.
- Lauterborn, B 1990, 'New marketing litany', *Advertising Age*, vol. 61, no. 41, pp. 26-.
- LeCompte, M & Schensul, J 1999, *Analyzing and interpreting ethnographic data*, AltaMira Press, Walnut Creek, CA.
- Leech, N & JO, A 2008, 'Qualitative data analysis: A compendium of techniques and a framework for selection for school psychology research and beyond', *School Psychology Quarterly*, vol. 23, pp. 587-604.
- Levie, D 2006, 'Capability reconfiguration: An analysis of incumbent responses to technology change', *Academy of Management Executive*, vol. 313, no. 1, pp. 153-74.
- Lewis, H & Gertsakis, J 2001, *Design +Environment. A Global Guide to Designing Greener Products* Greenleaf, Sheffield.
- Liam, F 1999, *Competitors: Outwitting, Out Maneuvering, and Out Performing*, John Wiley & Sons, Inc. .
- Liu, Y 2007, 'The Long-Term Impact of Loyalty Programs on Consumer Purchase Behavior and Loyalty', *Journal of Marketing*, vol. 71, no. 4, pp. 19-35.
- Luz, C 2007, 'Waste couture: Environmental impact of the clothing industry', *Environmental Health Perspectives*, vol. 115, no. 9, p. A448.

- Macdonald, EK & Sharp, BM 2000, 'Brand Awareness Effects on Consumer Decision Making for a Common, Repeat Purchase Product:: A Replication', *Journal of Business Research*, vol. 48, no. 1, pp. 5-15.
- Mackenzie, N & Knipe, S 2006, 'Research dilemmas: Paradigms, methods and methodology.', *Issues In Educational Research*, vol. 16, no. 2, pp. 193-205.
- MacNaughton, G, Rolfe, S & Siraj, B 2001, *Doing Early Childhood Research: International perspectives on theory and practice*, Allen and Unwin, Australia.
- Majumdar, A, Mukhopadhyay, S & Yadav, R 2010, 'Thermal properties of knitted fabrics made from cotton and regenerated bamboo cellulosic fibres', *International Journal of Thermal Sciences*, vol. 49, no. 10, pp. 2042-8.
- Malterud, K 2001, 'The art and science of clinical knowledge: evidence beyond measures and numbers', *The Lancet*, vol. 358, no. 9279, pp. 397-400.
- Mather, C 2004, 'Garment Industry Supply Chains. A Resource for Worker Education and Solidarity', *Women Working Worldwide*. Manchester.
- Maxwell, D & van der Vorst, R 2003, 'Developing sustainable products and services', *Journal of Cleaner Production*, vol. 11, no. 8, pp. 883-95.
- McCarthy, E 1960, *Basic Marketing: A Managerial Approach*, Richard D. Irwin, Homewood, Illinois.
- McCaston, MK 1998, 'Tips for collecting, reviewing, and analyzing secondary data', *Food Security Advisor and Deputy Household Livelihood Security Coordinator, PHLS Unit, CARE*.
- McDonough, W & Braungart, M 2002, *Cradle to cradle: Remarking the way we do things*, Norht Point Press, New York.
- Meadows, DH, Rome, Co & Associates, P 1972, *The Limits to growth: a report for the Club of Rome's project on the predicament of mankind*, Universe Books.
- Meffert, H & Kirchgeorg, M 1998, *Market-Based Environmental Management*, 3rd edn, Schaeffer-Poeschel, Stuttgart.
- Melissa, B 2012, '25 Shocking Fashion Industry Statistics', Tree Hugger, viewed November 18 2015, <<http://www.treehugger.com/sustainable-fashion/25-shocking-fashion-industry-statistics.html>>.
- Menon, A & Menon, A 1997, 'Enviropreneurial marketing strategy: The emergence of corporate environmentalism as market strategy', *Journal of Marketing*, vol. 61, no. 1, pp. 51-67.
- Merriam, SB 2009, *Qualitative Research: A Guide to Design and Implementation*, John Wiley & Sons.

- Mertens, DM 2005, *Research and Evaluation in Education and Psychology: Integrating Diversity with Quantitative, Qualitative, and Mixed Methods*, SAGE Publications.
- Mestre, A & Gil, L 2011, 'Cork for SuStainable ProduCt deSign', *Ciência & Tecnologia dos Materiais*, vol. 23, no. 3/4, pp. 52-63.
- Miles, M & Huberman, M 1994, *Qualitative Data Analysis: An Expanded Sourcebook*, Sage Publications, Thousand Oaks, CA.
- Mintel 2009, *Ethical Clothing*, Mintel International Group Limited, UK.
- Mohanty, AK, Misra, M & Hinrichsen, G 2000, 'Biofibres, biodegradable polymers and biocomposites: An overview', *Macromolecular Materials and Engineering*, vol. 276-277, no. 1, pp. 1-24.
- Moll, S & Acosta, J 2006, 'Environmental Implications of Resource Use: Environmental Input-Output Analyses for Germany', *Journal of Industrial Ecology*, vol. 10, no. 3, pp. 25-40.
- Morse, JM 1994, 'Designing funded qualitative research', in NK Denzin & YS Lincoln (eds), *Handbook of Qualitative Research*, Sage Publications, Inc, Thousand Oaks, CA, US, vol. xii.
- Mukherjee, A & Onel, N 2013, 'Building green brands with social media: Best practices from case studies', *Journal of Digital & Social Media Marketing*, vol. 1, no. 3, pp. 292-311.
- Myers, D, Stolten, S & Myers, D 1999, '1. Organic cotton-a more sustainable approach; The problems with conventional cotton', in *Organic Cotton*, Practical Action Publishing, pp. 1-20.
- National Health Medical Research Council 2007, *National statement on ethical conduct in human research*, Australian Government, Canberra.
- Neilssen, N & Scheepers, P 1992, 'Business strategy and the environment. The need for information about environmental consciousness and behavior', *Business Strategy and the Environment*, vol. 1, no. 2, pp. 13-23.
- Neuman, W 1997, *Social research methods: Qualitative and quantitative methods*, Allen and Bacon, Boston.
- Newholm, T & Shaw, D 2007, 'Studying the ethical consumer: A review of research', *Journal of Consumer Behaviour*, vol. 6, no. 5, pp. 253-70.
- Nguyen, V 2004, 'Analysis of the luxury goods & apparel and footwear industries', *Journal of Undergraduate Research of the University of Wisconsin-La Crosse*, pp. 1-23.
- Niinimäki, K 2010, 'Eco-clothing, consumer identity and ideology', *Sustainable Development*, vol. 18, no. 3, pp. 150-62.
- Niinimäki, K & Kääriäinen, P 2008, *From recession to retro with the help of computers in the 1990s*, The History of Finnish Printed Textiles, Maahenki, Helsinki.

- Niinimäki, K & Saloniemi, M 2008, *From cretonne to print: the history of Finnish printed textiles*, Maahenki Oy.
- Nikolaou, EI, Ierapetritis, D & Tsagarakis, KP 2011, 'An evaluation of the prospects of green entrepreneurship development using a SWOT analysis', *International Journal of Sustainable Development & World Ecology*, vol. 18, no. 1, pp. 1-16.
- Nordås, HK 2004, 'The global textile and clothing industry post the agreement on textiles and clothing', *World*, vol. 7, pp. 1,000.
- Nostro, PL, Fratoni, L, Ridi, F & Baglioni, P 2003, 'Surface treatments on Tencel fabric: Grafting with β -cyclodextrin', *Journal of Applied Polymer Science*, vol. 88, no. 3, pp. 706-15.
- Odum, E & Barrett, G 2005, *Fundamentals of Ecology*, Second edn, University of Georgia Institute of Ecology.
- Opendakker, R 2006, 'Advantages and disadvantages of four interview techniques in qualitative research', in *Forum Qualitative Sozialforschung/Forum: Qualitative Social Research*, vol. 7.
- Ottman, J & Reilly, W 1998, *Green Marketing: Opportunity for Innovation*, Second edn, Prentice Hall.
- Ottman, JA, Stafford, ER & Hartman, CL 2006, 'Avoiding Green Marketing Myopia: Ways to Improve Consumer Appeal for Environmentally Preferable Products', *Environment: Science and Policy for Sustainable Development*, vol. 48, no. 5, pp. 22-36.
- Patton, M 2002, *Qualitative research and evaluation methods*, 3rd edn, Sage, Thousand Oaks, CA.
- Peattie, K 2001, 'Golden goose or wild goose? The hunt for the green consumer', *Business Strategy and the Environment*, vol. 10, no. 4, pp. 187-99.
- Perry, C 1995, 'A Structured Approach to Presenting Theses: Notes for Student and Their Supervisors', *Southern Cross University, Lismore*.
- 1998a, 'Processes of a case study methodology for postgraduate research in marketing', *European Journal of Marketing*, vol. 32, no. 9/10, pp. 785-802.
- 1998b, 'A Structured Approach for Presenting Theses', *Australasian Marketing Journal (AMJ)*, vol. 6, no. 1, pp. 63-85.
- Phau, I & Ong, D 2007, 'An investigation of the effects of environmental claims in promotional messages for clothing brands', *Marketing Intelligence and Planning*, vol. 25, no. 7, pp. 772-88.
- Phillips, D, Suesat, J, Wilding, M, Farrington, D, Sandukas, S, Sawyer, D, Bone, J & Dervan, S 2004, 'Influence of different preparation and dyeing processes on the physical strength of the Ingeo[†] fibre component in an Ingeo fibre/cotton blend. Part 2; Bleaching followed by dyeing with disperse and reactive dyes[‡]', *Coloration Technology*, vol. 120, no. 1, pp. 41-5.

- Pieper, I & Thomson, CH 2011, 'Contextualising Merit and Integrity within Human Research', *Monash bioethics review*, vol. 29, no. 4, pp. 39-48.
- Popovic, D 2006, 'Modelling the marketing of high-tech start-ups', *Journal of Targeting, Measurement & Analysis for Marketing*, vol. 14, no. 3, pp. 260-76.
- Porter, ME 1979, 'How competitive forces shape strategy', *Harvard Business Review*, no. March-April, pp. 137-45.
- 1980, *Competitive strategy: Techniques for analyzing industries and competition*, The free press, New York.
- Prindle, B, Sathaye, J, Murtishaw, S, Crossley, D, Watt, G, Hughes, J, Takahashi, M, Asano, H, Worrell, E & Joosen, S 2007, 'Quantifying the effects of market failures in the end-use of energy', *Final Draft Report Prepared for International Energy Agency at <http://www.acee.org/energy/IEAMarketbarriers.pdf>*.
- Prothero, A & McDonagh, P 1992, 'Producing Environmentally Acceptable Cosmetics? The Impact of Environmentalism on the United Kingdom Cosmetics and Toiletries Industry', *Journal of Marketing Management*, vol. 8, no. 2, pp. 147-66.
- Punch, KF 2014, *Introduction to social research: Quantitative and qualitative approaches*, Third edn, Sage Publications Limited, London.
- Rafiq, M & Ahmed, PK 1995, 'Using the 7Ps as a generic marketing mix: an exploratory survey of UK and European marketing academics', *Marketing Intelligence & Planning*, vol. 13, no. 9, pp. 4-15.
- Raith, M, Staak, T & Wilker, H 2007, 'A decision-analytic approach to blue-ocean strategy development', in J Kalcsics & S Nickel (eds), *Operations Research Proceedings 2007*, Berlin and Heidelberg, pp. 29-225.
- Rautio, R 2006, *From Stock Exchange to Banners. The History of the Aitoo Textile Industry*, Printscorpio, Finland.
- Rautio, S 2013, 'Parents' experiences of early support', *Scandinavian Journal of Caring Sciences*, vol. 27, no. 4, pp. 927-34.
- Rayman, D, Burns, DJ & Nelson, CN 2011, 'Apparel product quality: Its nature and measurement', *Journal of Global Academy of Marketing*, vol. 21, no. 1, pp. 66-75.
- Riordan, DG & Pauley, SE 2004, *Technical Report Writing Today*, Houghton Mifflin.
- Roberts, S & Thoburn, J 2002, 'Globalization and the South African Textiles Industry', in *Trade and Industry Policy Strategies (TIPS) Workshop on Globalization, Production and Poverty* South Africa, Johannesburg/SA.
- Sandelowski, M 1993, 'Rigor or rigor mortis: The problem of rigor in qualitative research revisited', *Advances in Nursing Science*, vol. 16, no. 2, pp. 1-8.

Saricam, C, Kalaoglu, F, Ozduygu, YS & Orun, H 2012, 'Apparel product evaluation and quality perception of Turkish consumers', in *Paper accepted at 4th International Conference: Textile and FASHion*, pp. 3-4.

Scaturro, S 2008, 'Eco-tech Fashion: Rationalizing Technology in Sustainable Fashion', *Fashion Theory: The Journal of Dress, Body & Culture*, vol. 12, no. 4, pp. 469-88.

Schwandt, T (ed.) 2000, *Three Epistemological Stances for Qualitative Inquiry. Interpretivism, Hermeneutics and Social Constructionism*, 2nd edn, Handbook of Qualitative Research, Sage, London.

Sena-Martins, G, Almeida-Vara, E & Duarte, JC 2008, 'Eco-friendly new products from enzymatically modified industrial lignins', *Industrial Crops and Products*, vol. 27, no. 2, pp. 189-95.

Sharp, B 1991, 'Competitive marketing strategy: Porter revisited', *Marketing Intelligence & Planning*, vol. 9, no. 1, pp. 4-10.

Shaw, EH 2012, 'Marketing strategy: From the origin of the concept to the development of a conceptual framework', *Journal of Historical Research in Marketing*, vol. 4, no. 1, pp. 30-55.

Shen, B 2014, 'Sustainable fashion supply chain: Lessons from H&M', *Sustainability*, vol. 6, no. 9, pp. 6236-49.

Silverman, D 2000, *Doing qualitative research: A practical handbook*, Sage, Thousand Oaks, London.

Singh, M 2012, 'Marketing Mix of 4P'S for Competitive Advantage', *Journal of Business and Management*, vol. 3, no. 6, pp. 40-5.

Skgkao, S 1994, 'Consumers perceptions of apparel quality-part1:Structure of apparel quality perceived by female college students', *Journal of Textile Machinery Society of Japan*, vol. 47, no. 2, pp. 46-51.

Slater, S & Olson, E 2001, 'Marketing's contribution to the implementation of business strategy: An empirical analysis', *Strategic Management Journal*, vol. 22, no. 11, pp. 1055-67.

Smith, WR 1956, 'Product differentiation and market segmentation as alternative marketing strategies', *Journal of Marketing*, vol. 21, no. 1, pp. 3-8.

Snape, D & Spencer, L 2003, *The foundations of qualitative research*, Qualitative research practice: A guide for social science students and researchers, Sage, London.

Sonnenberg, N, Jacobs, B & Momberg, D 2014, 'The Role of Information Exposure in Female University Students' Evaluation and Selection of Eco-Friendly Apparel in the South African Emerging Economy', *Clothing and Textiles Research Journal*, vol. 32, no. 4, pp. 266-81.

Spangenberg, J 2001, *Sustainable Development: From catchwords to benchmarks and operational concepts*, Sustainable Solutions; Developing Products and Services for the Future, Greenleaf, Sheffield.

Srivastava, RK, Shervani, TA & Fahey, L 1999, 'Marketing, Business Processes, and Shareholder Value: An Organizationally Embedded View of Marketing Activities and the Discipline of Marketing', *Journal of Marketing*, vol. 63, no. 4, pp. 168-79.

Steffen, D, Marin, AW & Müggler, IR 2013, 'Bamboo: A holistic approach to a renewable fibre for textile design', in *10th European Academy of Design Conference - Crafting the Future*, HDK, School of Design and Crafts, University of Gothenburg, Kristinelundsgatan 6-8, Göteborg.

Stern, N & Ander, W 2008, *Greentailing and Other Revolutions in Retail: Hot Ideas That Are Grabbing Customers' Attention and Raising Profits*, Wiley, Hoboken.

Strauss, A & Corbin, J 1998, *Basics of qualitative research, techniques and procedures for developing grounded theory*, Second edn, Sage, London.

Susanne, P & Carolyn, F 2005, 'Exploring the gap between attitudes and behaviour', *British Food Journal*, vol. 107, no. 8, pp. 606-25.

Tanner, C & Wölfling Kast, S 2003, 'Promoting sustainable consumption: Determinants of green purchases of swiss consumers', *Psychology & Marketing*, vol. 20, no. 10, pp. 883-902.

Textile Exchange 2010, *Global Market Report on Sustainable Textiles: Executive Summary*, Textile Exchange, viewed 1 January 2015, <http://textileexchange.org/sites/default/files/te_pdfs/2010%20Global%20Market%20Report%20on%20Sustainable%20Textiles-Executive%20Summary.pdf>.

— 2011, 'Organic Cotton Market Report', Available in: http://textileexchange.org/sites/default/files/te_pdfs/2011_Organic_Cotton_Market_Report_website.pdf [Accessed 15th July 2014]. [Links].

Thomas, J & Harden, A 2008, 'Methods for the thematic synthesis of qualitative research in systematic reviews', *BMC Medical Research Methodology*, vol. 8, no. 1, p. 45.

Thomas, S 2008, 'From "Green Blur" to Eco-fashion: Fashioning an Eco-lexicon', *Fashion Theory: The Journal of Dress, Body & Culture*, vol. 12, no. 4, pp. 525-39.

Thurmond, VA 2001, 'The Point of Triangulation', *Journal of Nursing Scholarship*, vol. 33, no. 3, pp. 253-8.

Tukker, A & Jansen, B 2006, 'Environmental Impacts of Products: A Detailed Review of Studies', *Journal of Industrial Ecology*, vol. 10, no. 3, pp. 159-82.

Turner, I & Daniel, W 2010, 'Qualitative interview design: A practical guide for novice investigators', *The qualitative report*, vol. 15, no. 3, pp. 754-60.

Udo-Akang, D 2013, 'Ethical Orientation for New and Prospective Researchers', *American International Journal of Social Science*, vol. 2, no. 1, pp. 54-64.

Ulaga, W & Chacour, S 2001, 'Measuring Customer-Perceived Value in Business Markets: A Prerequisite for Marketing Strategy Development and Implementation', *Industrial Marketing Management*, vol. 30, no. 6, pp. 525-40.

van Teijlingen, E & Hundley, V 2001, 'The importance of pilot studies', *Social research update*, no. 35, pp. 1-4.

Vardas, H 2010, 'Marketing eco-fashion: is eco-fashion a fad, the future or utopia? Examining the role of sustainability marketing in the evolving eco-fashion segment.', paper presented to Brunel Business School – Doctoral Symposium, Brunel.

Vollmann, J & Winau, R 1996, 'Informed consent in human experimentation before the Nuremberg code', *BMJ: British Medical Journal*, vol. 313, no. 7070, p. 1445.

Warren, C (ed.) 2002, *Qualitative Interviewing*, Handbook of Interview Research: Context and Method, Thousand Oaks, CA: Sage.

Webber, S 2005, 'Strategy matters: in review', *Across The Board*, no. March/April, pp. 59-60.

West, D, Ford, J & Ibrahim, E 2015, *Strategic marketing: creating competitive advantage*, Oxford University Press.

Wiersma, W 2000, *Research methods in education: An introduction*, 7th edn, Allyn and Bacon, Boston.

Wisdom, J & Creswell, J 2013, 'Mixed methods: Integrating quantitative and qualitative data collection and analysis while studying patient-centered medical home models', *Rockville, MD: Agency for Healthcare Research and Quality*.

Wong, V, Turner, W & Stoneman, P 1996, 'Marketing Strategies and Market Prospects for Environmentally Friendly Consumer Products', *British Journal of Management*, vol. 7, pp. 263-81.

Wong, V, Turner, W & Stoneman, P 1996, 'Marketing strategies and market prospects for environment ally -friendly consumer products', *British Journal of Management*, vol. 7, pp. 263-81.

Wysocki, AF & Wirth, FF 2001, *Strategic Marketing Management: Building a Foundation for Your Future*, University of Florida Cooperative Extension Service, Institute of Food and Agricultural Sciences, EDIS.

Yan, R-N, Hyllegard, KH & Blaesi, LF 2012a, 'Marketing eco-fashion: The influence of brand name and message explicitness', *Journal of Marketing Communications*, vol. 18, no. 2, pp. 151-68.

Yan, R, Hyllegard, K & Blaesi, L 2012b, 'Marketing eco-fashion: The influence of brand name and message explicitness', *Journal of Marketing Communications*, vol. 18, no. 2, pp. 151-68.

Appendices

Appendix A: Consent form for consumer interviews



Consent Form for USQ Research Project Interview (Consumers)

Project Details

Title of Project: Marketing Strategy for Eco-apparel
 Human Research Ethics Approval Number: H14REA221

Research Team Contact Details

Principal Investigator Details

Mr. Saugat Neupane
 Email: u1056199@usq.edu.au
 Telephone: (07) 4631 5840
 Mobile: 0432150919

Other Investigator/Supervisor Details

Dr. Ranga Chimhundu
 Email: Ranga.Chimhundu@usq.edu.au
 Telephone: (07) 4687 5759
 Mobile: 0416321803

Statement of Consent

By signing below, you are indicating that you:

- Have read and understood the information document regarding this project.
- Have had any questions answered to your satisfaction.
- Understand that if you have any additional questions you can contact the research team.
- Understand that the interview will be audio recorded.
- Understand that you will not be provided with a copy of the transcript of the interview for your perusal and endorsement prior to inclusion of this data in the project.
- Understand that you are free to withdraw at any time, without comment or penalty.
- Understand that you can contact the University of Southern Queensland Ethics Coordinator on (07) 4631 2690 or email ethics@usq.edu.au if you do have any concern or complaint about the ethical conduct of this project.
- Are over 18 years of age.
- Agree to participate in the project.

Participant Name

Participant Signature

Date

Please return this sheet to a Research Team member prior to undertaking the interview.

Appendix B: Consent form for manager interviews



Consent Form for USQ Research Project Interview (Managers/Industry Experts)

Project Details

Title of Project: Marketing Strategy for Eco-apparel
 Human Research Ethics Approval Number: H14REA221

Research Team Contact Details

Principal Investigator Details

Mr. Saugat Neupane
 Email: u1056199@usq.edu.au
 Telephone: (07) 4631 5840
 Mobile: 0432150919

Other Investigator/Supervisor Details

Dr. Ranga Chimhundu
 Email: Ranga.Chimhundu@usq.edu.au
 Telephone: (07) 4687 5759
 Mobile: 0416321803

Statement of Consent

By signing below, you are indicating that you:

- Have read and understood the information document regarding this project.
- Have had any questions answered to your satisfaction.
- Understand that if you have any additional questions you can contact the research team.
- Understand that the interview will be audio recorded.
- Understand that you will not be provided with a copy of the transcript of the interview for your perusal and endorsement prior to inclusion of this data in the project.
- Understand that you are free to withdraw at any time, without comment or penalty.
- Understand that you can contact the University of Southern Queensland Ethics Coordinator on (07) 4631 2690 or email ethics@usq.edu.au if you do have any concern or complaint about the ethical conduct of this project.
- Are over 18 years of age.
- Agree to participate in the project.

Participant Name

Participant Signature

Date

Please return this sheet to a Research Team member prior to undertaking the interview.

Appendix C: Information sheet for consumer interviews



Participant Information for USQ Research Project Interview (Consumers)

Project Details

Title of Project: Marketing Strategy for Eco-apparel

Human Research Ethics Approval Number: H14REA221

Research Team Contact Details

Principal Investigator Details

Mr. Saugat Neupane
Email: u1056199@umail.usq.edu.au
Telephone: (07) 4631 5840
Mobile: 0432150919

Supervisor Details

Dr. Ranga Chimhundu
Email: Ranga.Chimhundu@usq.edu.au
Telephone: (07) 4687 5759
Mobile: 0416321803

Description

This project is being undertaken as part of a Research Masters Project. The area of research is marketing of eco-apparel. The use of apparel products has created a negative impact on our ecology. So, a focus is arising on use of eco-apparel which would cause less negative impact on environment and living beings. However, use of eco-apparel is not extensively practiced. This research is trying to understand challenges and weaknesses of eco-apparel. It is very important to identify the reasons why consumers are not buying these products and how these consumers can be attracted towards eco-apparel. This project will design a marketing strategy to overcome such challenges of eco-apparel and increase its use.

The research team requests your assistance because your knowledge and buying experiences, as well as any information you might have related to apparel and eco-apparel can provide a better insight into this research.

Participation

Your participation will involve participation in an interview that will take approximately an hour of your time.

The interview will take place at a time and venue that is convenient to you. It may also be undertaken by teleconference at a date and time that is convenient to you.

The questions will be generally related to the obstacles, problems or hindrances you may face while thinking of buying eco-apparel. The interview will also lead to questions such how would you assess (eg. Quality, size, price and so on) and make a decision to buy apparel.

The interview will be audio recorded.

Your participation in this project is entirely voluntary. If you do not wish to take part you are not obliged to. If you decide to take part and later change your mind, you are free to withdraw from the project at any stage. You may also request that any data collected about you be destroyed. If you do wish to withdraw from this project or withdraw data collected about you, please contact the Research Team (contact details at the top of this form).

Your decision whether you take part, do not take part, or to take part and then withdraw, will in no way impact your current or future relationship with the University of Southern Queensland.

Expected Benefits

It is expected that the results of this study may be of interest to you and your organization. It may benefit eco-apparel companies in general by providing a guide to increase the market of eco-apparel products. The results of this research will identify some critical areas where eco-apparel may focus in order to increase its market. Ultimately, the increase of eco-apparel market will help reduce the negative impact of apparel on natural environment.

Risks

There are minimal risks associated with your participation in this project. These include spending up to an hour of your time for a research interview. However, the researcher will try to organize the interview in a time that is more suitable and comfortable to you so that you do not necessarily compromise any of your important work for this interview.

Privacy and Confidentiality

All comments and responses will be treated confidentially unless required by law.

- The participants will not have the opportunity to verify their comments and responses prior to final inclusion.
- The recordings will be solely used for this research only.
- University of Southern Queensland and the research team will have access to the recording.
- It is not possible to participate in the project without being recorded.

Any data collected as a part of this project will be stored securely as per University of Southern Queensland's Research Data Management policy and only members of the research team will have access.

Consent to Participate

We would like to ask you to sign a written consent form (enclosed) to confirm your agreement to participate in this project. Please return your signed consent form to a member of the Research Team prior to participating in your interview.

Questions or Further Information about the Project

Concerns or Complaints Regarding the Conduct of the Project

If you have any concerns or complaints about the ethical conduct of the project you may contact the University of Southern Queensland Ethics Coordinator on (07) 4631 2690 or email ethics@usq.edu.au. The Ethics Coordinator is not connected with the research project and can facilitate a resolution to your concern in an unbiased manner.

Thank you for taking the time to help with this research project. Please keep this sheet for your information.

Appendix D: Information sheet for manager interviews



Participant Information for USQ Research Project Interview (Managers/Industry Experts)

Project Details

Title of Project: Marketing Strategy for Eco-apparel

Human Research Ethics Approval Number: H14REA221

Research Team Contact Details

Principal Investigator Details

Mr. Saugat Neupane
Email: u1056199@umail.usq.edu.au
Telephone: (07) 4631 5840
Mobile: 0432150919

Supervisor Details

Dr. Ranga Chimhundu
Email: Ranga.Chimhundu@usq.edu.au
Telephone: (07) 4687 5759
Mobile: 0416321803

Description

This project is being undertaken as part of a Research Masters Project. The area of research is marketing of eco-apparel. The use of apparel products has created a negative impact on our ecology. So, a focus is arising on use of eco-apparel which would cause less negative impact on environment and living beings. However, use of eco-apparel is not extensively practiced. This research is trying to understand challenges and weaknesses of eco-apparel. It is very important to identify the reasons why consumers are not buying these products and how these consumers can be attracted towards eco-apparel. This project will design a marketing strategy to overcome such challenges of eco-apparel and increase its use. The purpose of this project is to design a marketing strategy to overcome the marketing barriers of environmentally friendly apparel (eco-apparel) and to increase the market for eco-apparel products.

The research team requests your assistance because your knowledge and/or marketing experience in the apparel industry as well as any information you might have related to apparel and eco-apparel can provide a better insight into this research.

Participation

Your participation will involve participation in an interview that will take approximately an hour of your time.

The interview will take place at a time and venue that is convenient to you. It may also be undertaken by teleconference at a date and time that is convenient to you.

Questions will include your knowledge and experiences regarding marketing apparel and eco-apparel products.

The interview will be audio recorded.

Your participation in this project is entirely voluntary. If you do not wish to take part you are not obliged to. If you decide to take part and later change your mind, you are free to withdraw from the project at any stage. You may also request that any data collected about you be destroyed. If you do wish to withdraw from this project or withdraw data collected about you, please contact the Research Team (contact details at the top of this form).

Your decision whether you take part, do not take part, or to take part and then withdraw, will in no way impact your current or future relationship with the University of Southern Queensland.

Expected Benefits

It is expected that this project will benefit you and your organisation. The results of this research will be applicable for your company, with respect to how your eco-apparel products could be effectively marketed. Also, the results will benefit society in general by providing a guide to increase the market of eco-apparel products, and since these products have a minimum negative effect on the natural environment, this will help to save the natural environment.

Risks

There are minimal risks associated with your participation in this project. These include spending up to an hour of your time for an interview. However, the researcher will try to organize the interview in a time that is more suitable and comfortable to you so that you do not necessarily compromise any of your important work for this interview.

Sometimes thinking about the sorts of issues raised in the interview can create some uncomfortable or distressing feelings. If you need to talk to someone about this immediately please contact Lifeline on 13 11 14. You may also wish to consider consulting your General Practitioner (GP) for additional support.

Privacy and Confidentiality

All comments and responses will be treated confidentially unless required by law.

- The participants will not have the opportunity to verify their comments and responses prior to final inclusion.
- The recordings will be solely used for this research only.
- University of Southern Queensland and the research team will have access to the recording.
- It is not possible to participate in the project without being recorded.

Any data collected as a part of this project will be stored securely as per University of Southern Queensland's Research Data Management policy and only members of the research team will have access.

Consent to Participate

We would like to ask you to sign a written consent form (enclosed) to confirm your agreement to participate in this project. Please return your signed consent form to a member of the Research Team prior to participating in your interview.

Questions or Further Information about the Project

Please refer to the Research Team Contact Details at the top of the form to have any questions answered or to request further information about this project.

Concerns or Complaints Regarding the Conduct of the Project

If you have any concerns or complaints about the ethical conduct of the project you may contact the University of Southern Queensland Ethics Coordinator on (07) 4631 2690 or email ethics@usq.edu.au. The Ethics Coordinator is not connected with the research project and can facilitate a resolution to your concern in an unbiased manner.

Thank you for taking the time to help with this research project. Please keep this sheet for your information.

Appendix E: Interview guide for consumers

Marketing strategy for eco-apparel

Interview guide (Non-users of eco-apparel)

Introduction:

Greeting and introductory remarks

Participant's Details:

Name:

Address:

Phone no.:

Email:

Topic list (1 to 5) and sample questions:

1. Marketing barriers of eco-apparel

- What do you know about eco-apparel? Do you prefer them? Provide more detail
- What could be the probable reasons that reduce your preference for eco-apparel?
- What makes you buy non eco-apparel more frequently compared to eco-apparel?
- How could eco-apparel be made more preferable to consumers?

2. Key factors of competition between eco and non-eco apparel

- What are the factors you value most when buying apparel? (List the key factors such as price, quality, material, and designs and so on).
- List the factors that non eco-apparel companies focus on (or invest in) to attract more consumers. Also, any specific factors with respect to eco-apparel.

3. Comparison of offering of eco and non eco-apparel across key factors of competition

- How are eco-apparel/non eco-apparel company performing (low to high) in terms of the key factors (factors listed in question 2)? Please explain how you feel or perceive the offerings of eco and non eco-apparel companies across those different factors.

4. New strategic profile for eco-apparel

- Do you think there are differences in offerings of eco and non eco-apparel companies in regards to those key factors? Please explain.
- How can eco-apparel incorporate the key factors of non eco-apparel to make eco-apparel the preferred choice of consumers?

1

5. **Marketing program for eco-apparel**

- What kind of marketing program should eco-apparel companies design to attract more consumers?
- Would you suggest any specific ideas, objectives, activities and strategies?

Appendix F: Interview guide for managers

Marketing strategy for eco-apparel Interview guide (companies and industry experts)

Introduction:

Greeting and introductory remarks

Participant's Details:

Name:

Address:

Phone no.:

Email:

Topic list (1 to 5) and sample questions:

1. Marketing barriers of eco-apparel

- How would do you describe the current market of eco-apparel?
- What are the barriers facing eco-apparel? (The barriers could be problems, inefficiencies, weaknesses, threats in relation to production, distribution, promotion and pricing of eco-apparel).
- How could the market of eco-apparel be grown?

2. Key factors of competition between eco and non-eco apparel

- How do consumers choose an apparel product?
- What are the factors they value most?
- List the key factors that eco-apparel/non eco-apparel company invests in or focus more such on (e.g. price, quality, material, and designs and so on).

3. Comparison of offering of eco and non eco-apparel across key factors of competition

- How well is eco-apparel/non eco-apparel company performing (low to high) in terms of the factors that consumer's value (factors listed in question 2)?
- Please explain how consumers feel or perceive the offerings of eco and non eco-apparel companies across the different factors.

4. New strategic profile for eco-apparel

- Do you think there are differences in offerings of eco and non eco-apparel companies in regards to those key factors? Please explain.
- How can we incorporate the differences in their offering to devise a new strategy for eco-apparel? What are the factors that can be raised/reduced/created/eliminated?

1

5. Marketing program for eco-apparel

- What kind of marketing program would best fit eco-apparel?
- Would you suggest any specific idea, objective, activities, and strategies?

Appendix G: Ethics approval letter

OFFICE OF RESEARCH
 Human Research Ethics Committee
 PHONE +61 7 4631 2690 | FAX +61 7 4631 5555
 EMAIL ethics@usq.edu.au



18 March 2015

Mr Saugat Neupane
 3/15 Christensen Street
 Yeronga
 Brisbane QLD 4104

Dear Saugat

The USQ Human Research Ethics Committee has recently reviewed your responses to the conditions placed upon the ethical approval for the project outlined below. Your proposal is now deemed to meet the requirements of the *National Statement on Ethical Conduct in Human Research (2007)* and full ethical approval has been granted.

| | |
|---------------|------------------------------------|
| Approval No. | H14REA221 |
| Project Title | Marketing strategy for eco-apparel |
| Approval date | 18 March 2015 |
| Expiry date | 18 March 2018 |
| HREC Decision | Approved |

The standard conditions of this approval are:

- (a) conduct the project strictly in accordance with the proposal submitted and granted ethics approval, including any amendments made to the proposal required by the HREC
- (b) advise (email: ethics@usq.edu.au) immediately of any complaints or other issues in relation to the project which may warrant review of the ethical approval of the project
- (c) make submission for approval of amendments to the approved project before implementing such changes
- (d) provide a 'progress report' for every year of approval
- (e) provide a 'final report' when the project is complete
- (f) advise in writing if the project has been discontinued.

For (c) to (e) forms are available on the USQ ethics website:
<http://www.usq.edu.au/research/ethicsbio/human>

Please note that failure to comply with the conditions of approval and the *National Statement (2007)* may result in withdrawal of approval for the project.

You may now commence your project. I wish you all the best for the conduct of the project.



Annmaree Jackson
Ethics Coordinator

Copies to: u1056199@usq.edu.au