

If Not Now, When?

Critical Reflections on the Future of Sustainability Among Apparel Industry Leaders

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Background and Purpose: The environmental and social damage brought about by the global apparel industry has been well established in both the academic literature and popular press. From exploiting workers in nearly every country of the world, to causing irrevocable harm to the planet's diverse eco-systems, the apparel industry has developed a reputation for a lack of commitment to the responsible use of both natural and human resources (James & Montgomery, 2017; Marcketti & Karpova, 2020). Consumer demand is often cited as the driving force behind the strategic decisions apparel companies make (Gupta & Gentry, 2018). Yet, as Steve Jobs once said, "People don't know what they want until you show it to them" (Reinhardt, 1998, para 4). In other words, consumers alone are not to blame for the decisions made by firms, especially those that are deliberately designed to create demand. Moreover, calls for sustainability have come from individuals and organizations across the world for decades (Sustainable Apparel Coalition, 2019), yet the industry's production activity has not slowed down. Instead, it has rapidly accelerated (Niinimäki et al., 2020). To address this issue, the purpose of this study was to consider the future of sustainability within the apparel industry through the perceptual lens of high-level industry professionals, or those leaders in whose daily decision-making ostensibly rests the answer to the question: *If not now, when?*

In 1995, Hart introduced the Natural Resource Based View of the Firm (NRBV), a spinoff of the widely used Resource Based View theory, but tailored to include consideration of a firm's sustainability-related goals. In the NRBV, three dimensions shape how a firm can work toward sustainable outcomes, and at the same time, achieve competitive advantage: (1) pollution prevention, (2) product stewardship, and (3) sustainable development. Indeed, some prior studies have employed the NRBV framework to examine the implementation of 'green operations' and closed loop systems within apparel manufacturing (Guo, 2023; Miemczyk et al., 2016). One of the key actors within the NRBV is the firm's stakeholders (Hart, 1995). In the apparel literature, employees have often been positioned as firm stakeholders, as they are able to influence apparel firm behaviors, including ethical decision-making (Lee & Ha-Brookshire, 2020; Resta et al., 2017). Although it is not unusual to tap the perspectives of industry professionals in considering future trends (Bailey-Todd et al., 2008; Kim & Johnson, 2009), few studies have sought the perceptions of industry leaders as stakeholders with key decision-making responsibilities to specifically understand what they think about sustainability and the apparel industry of the future.

Method: With IRB approval from the researchers' university, in-depth interviews were conducted with 24 industry leaders (12 male and 12 female) representing 21 different global companies and brands, four of which are currently Fortune 500 companies. Combined, revenues of the 21 companies equate to more than \$78 billion, or what amounts to one quarter (25%) of the

total US apparel market. Participants' total industry experience ranged from 14 to 42 years, with a mean of 18.75 years, and titles ranged from President and CEO to Senior VP and Senior Director. Interviews were conducted via Zoom, lasted between 40 and 90 minutes, and were audio-recorded with participant's consent. A pseudonym was assigned to each participant. Questions focused on such issues as what the barriers are to sustainable apparel firm behavior, the roles of consumers and government in achieving sustainability, and what the 'ideal' industry of the future looks like.

Upon completion of data collection, the interviews were transcribed and analyzed for emergent themes across the responses (Spiggle, 1994). Each member of the research team reviewed the transcripts and coded the data collaboratively. Working together to identify the primary emergent themes, the group discussed categories of meaning until consensus was reached (Cascio et al., 2019). As a result of this iterative process of analysis, five themes emerged, which, when posed as questions, offer critical and reflective insight into the potential pain points that are operating to inhibit industry change, and ultimately, prevent a more sustainable future. Hart's (1995) NRBV was the conceptual lens through which the themes were interpreted.

Findings: Although participants acknowledged the need to slow the industry's pace, there was a general sense of being overwhelmed by the magnitude of the task. Indeed, the emergent theme of *Where to begin?* reflects conflicting views about whether demand or supply is at the root of the industry's chaotic pace. As Eric stated, "It's a big topic and it depends on who you talk to." Differing views on what sustainability means, embodied in the theme *What, exactly, are we talking about?* add to the overall confusion about what can be done, while pointing to the need for a common terminology around sustainability, because, as Rita put it, at present there are "ten different answers to ten different questions" when it comes to the topic.

All participants pointed to the negative effects of global apparel production, yet few talked about how they have the power to alleviate these effects. Instead, they were conflicted as to where the accountability for "steering the big ship" (Jenny) of the industry lies, framing the emergent theme of *Who, exactly, is in charge?* and reflecting divergent views on where the power to create necessary change actually rests, whether with consumers, government, industry, or third-party certification organizations. In general, participants did not believe third-party certifications were trustworthy sources, and many, like Mike, argued that governmental legislation of the industry has "historically not been effective." Participants seemed to share the view that it is the consumer that needs to change, in as much as they do not want to "pay \$5 more for something that is sustainable" (Eric), and even if it means that they must be "hit over the head" (Monica) with sustainability messaging. Related to the fourth emergent theme, *How can I?* the perception that it is consumer demand that drives the industry reveals the dominant role that profit margins play in the participants' everyday lives, or "the investor side that's demanding margin and return" (William). The final emergent theme, *What future?* reveals the extent to which participants—despite being industry leaders with high levels of expertise—had difficulty envisioning a better future. That is, due to the speed of change and pace of their day-to-day responsibilities, they found it difficult to step back and envision a different reality. Some suggested that the future does not actually rest with them, and that the road to a sustainable future is a "journey that never ends" (Dave).

Conclusions and Implications: Findings shed light on the extent to which stakeholders of apparel firms, and specifically high-level industry professionals with strategic decision-making responsibilities, face challenges not just in making decisions that could lead to more sustainable industry practices, but in being able to envision an industry that is truly sustainable. Instead, most participants' decisions were driven by the desire to meet the firm's more immediate profit margin goals and by achieving competitive advantage in ways that run counter to the NRBV's tenets (Hart, 1995). Yet they all agreed that the current industry trajectory is not sustainable. Interestingly, aside from the fact that participants are as much apparel consumers as they are industry leaders, the consensus was that until consumer demands change, the industry will stay on its current course. Consequently, findings of this study point to a bigger question: *If they won't, who will?* Clearly, educating students to understand the importance of product stewardship and sustainable development is an imperative, however, as consumers, they are also motivated to overconsume (Williams & Hodges, 2022). Research that fosters collaborations between educators and industry leaders could be used to address the critical disconnects revealed in this study, as it may facilitate better understanding of how to prepare future industry leaders that both *can* and *will*.

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