

Integrating Sustainability and Country Image: Strategic Insights from the Italian Fashion Industry

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Abstract

The luxury fashion industry is increasingly pressured to adopt sustainable practices due to heightened consumer awareness and stricter regulations. In Italy, a country recognized worldwide for its tradition in fashion and a symbol of excellence thanks to the “Made in Italy” brand, this issue takes on special importance. Despite extensive research on sustainability and country image separately, their intersection in Italian fashion remains underexplored. This study aims to explore how Italian fashion companies can strategically integrate sustainability and country image, particularly the "Made in Italy" brand, to enhance competitive advantage. Through qualitative analysis, including in-depth interviews with key informants ($n = 10$), the research highlights how Italian fashion brands are integrating sustainability and country image in their marketing strategies, focusing on two macro-themes: (1) *brand identity and positioning*, and (2) *marketing organization and relationships*. The findings offer practical insights for managers on aligning sustainability with country heritage in a global market.

Keywords: Made in Italy, Sustainability, Country Image, Luxury Fashion, In-depth interviews.

1. Introduction

The global luxury fashion industry, particularly in Italy, is navigating significant challenges as it seeks to balance the integration of sustainability with the preservation and promotion of the 'Made in Italy' brand (Camera Nazionale della Moda Italiana, 2023). While constituting a relatively small portion in terms of volume, the luxury fashion market accounts for a significant portion of the economic value in the global fashion industry (D'Arpizio et al., 2023), with Italian fashion playing a central role (Deloitte, 2023). Italian luxury fashion has historically been synonymous with high quality, craftsmanship, and design excellence (Marino e Mainolfi, 2013). However, the increasing consumer demand for sustainability and the tightening regulatory frameworks are forcing brands to rethink their strategies, including sustainability in their marketing strategies (McKinsey, 2020).

Previous studies highlight the significance of country image (CI) as a valuable intangible resource (Barney, 1991; Wernerfelt, 1984) that, when strategically integrated, can provide a competitive advantage for brands (Aichner, 2015; Suter et al., 2018). Similarly, sustainability, also conceptualized as an intangible resource (Barney, 1991; Wernerfelt, 1984), offers companies substantial competitive benefits (Engert et al., 2016; Porter and Kramer, 2006). While both CI and sustainability have been identified as key resources in firms' marketing strategies, their intersection remains underexplored in the literature, revealing a significant research gap.

In the Italian context, this synergy holds particular promise: the luxury fashion industry benefits uniquely from a robust CI rooted in Italy's cultural and historical heritage. Exploring this gap offers an opportunity to understand how the strategic combination of sustainability and CI can not only safeguard but also enhance the competitiveness of Italian luxury brands. As luxury consumers increasingly prioritize sustainability (Henninger, 2023) alongside brand heritage, investigating this interaction can inform more effective marketing strategies that align with contemporary values while preserving the historical and cultural identity of the brand.

This study addresses this gap by examining how Italian luxury fashion brands are integrating sustainability strategies with country image strategies. To answer this research question, we adopt a qualitative approach involving 10 key informants from the Italian luxury fashion sector. Data were

collected through in-depth interviews and analyzed using thematic content analysis (King & Horrocks, 2010).

The findings reveal that Italian luxury fashion brands are increasingly integrating sustainability with their country image, focusing on enhancing and expanding their brand identity, positioning, marketing organization, and stakeholder relationships.

By contributing to the academic debate on the strategic integration of sustainability and CI in the luxury fashion industry, this study underscores how Italian luxury firms can achieve a competitive advantage through effective alignment of these elements in their marketing strategies. From a managerial perspective, it emphasizes the importance of harmonizing sustainable practices with brand assets and leveraging the strong “Made in Italy” image to strengthen global market positioning.

2. Theoretical background

Adopting the theoretical lens of the Resource-Based View (RBV) (Barney, 1991; Wernerfelt, 1984), this study draws on research that considers both sustainability and country image as intangible assets for a company. When strategically integrated into business operations, these assets can provide a competitive advantage (Engert et al., 2016; Porter and Kramer, 2006).

In the fashion industry, sustainability has become imperative, especially since this sector is recognized as one of the most polluting globally (UNEP, 2023). In countries like Italy, where fashion is a driving force of the national economy (Confindustria, 2023), increasing pressure from various stakeholders—such as consumers, regulatory bodies, supply chain partners, and others—forces marketing managers to rethink their business strategies to address the demand for change; with luxury brands being particularly scrutinized (Henninger, 2023). Luxury brands face unique challenges to include sustainability in their strategies, one of which lies in the perceived conflict between the exclusivity that defines luxury, and the accessibility often associated with sustainability (Kapferer and Michaut, 2014; Amatulli et al., 2018). Furthermore, the complexity of reconfiguring supply chains and managing associated costs adds another layer of difficulty in integrating sustainability into the business models of luxury fashion companies (Caniato et al., 2012), especially for supply chains extremely fragmented and characterized by micro firms as in the Italian context.

As these challenges grow, the body of literature on sustainability is expanding to provide knowledge that helps companies maintain a competitive edge in the market. Previous studies have established that sustainability may be a critical strategic asset (Engert et al., 2016; Porter and Kramer, 2006), in business strategies across various levels. For example, Du et al. (2011) found that by incorporating sustainability in marketing strategies, fashion firms can enhance brand reputation and unlock new market opportunities. Moreover, sustainability strategies can foster customer loyalty (Luo and Bhattacharya, 2006) and push the firm toward innovations (Matarazzo et al., 2021).

Simultaneously, literature on business strategy emphasizes the importance of the country image as another valuable intangible resource (e.g. Aichner, 2015; Suter et al., 2018), especially associated with a sustainable country reputation (Cowan, 2020). Strategically integrated, CI can provide a competitive edge for the brand (Suter et al., 2018). Furthermore, a positive environmental reputation of the country can significantly boost a brand's attractiveness and differentiation in the global marketplace (Dekhili and Achabou, 2021; Dekhili et al., 2021). As confirmed by a recent literature review (Samiee et al., 2024), the country image represents an extrinsic product characteristic that strongly impacts consumers' purchasing choices. At the same time, the ecological image of the country-of-origin impacts sustainable purchasing choices (Brand et al., 2021) becoming *de facto* an issue to consider when undertaking strategies that include sustainability (Magnusson et al., 2015). In addition, a recent study also has shown that the country's image is one of the critical factors to be managed by fashion brands who want to invest in sustainability to meet the expectations of stakeholders (Kotzian, 2024).

As a result of these developments, is evident the importance of studying sustainability and the country's image together. However, despite the growing body of literature highlighting the benefits of sustainability and the country's image individually, the intersection of these two elements remains

largely unexplored (Brand et al., 2021). Moreover, while there is an increasing number of studies examining the interaction between country image and sustainability from the consumer's point of view (e.g. Dekhili and Achabou, 2021; Magnusson et al., 2015), the business perspective remains underdeveloped, especially in the Italian fashion context (Ceccotti et al., 2024), representing a critical gap in existing research. This study aims to address this gap by investigating how Italian fashion companies are incorporating sustainability and country image into their marketing strategies.

Understanding how to effectively combine these elements can enhance the competitiveness of Italian luxury fashion companies and contribute to broader sustainable objectives—economic, social, and environmental.

3. Methodology

To address our research objective, and given the limited existing literature, we adopted a qualitative exploratory approach grounded in in-depth interviews from a managerial perspective (Creswell, 1998). The selection of professionals was guided by the key informant approach (Robson and Foster, 1989), ensuring that only expert profiles were included in the "theoretical sample" (Dexter, 1970). We targeted individuals holding leadership positions within sustainable, Made in Italy luxury fashion companies (e.g., Marketing Director, Sustainability Director) and senior consultants with substantial expertise in the field under analysis. Data saturation, defined as the point at which no new themes arise during interviews and analysis (Guest et al., 2006; Saunders & Townsend, 2016), guided the determination of the final sample size. According to Guest et al. (2006), six interviews are generally adequate to capture the fundamental components of meta-themes. In line with this benchmark, our study achieved data saturation after conducting interviews with 10 experts. As a result, we engaged eight senior managers from four different luxury fashion brands, all of which have integrated sustainability and Made in Italy into their marketing strategies. These managers represented various organizational areas, including strategy, marketing, branding, and sustainability. Additionally, we involved two consultants from different organizations with substantial experience in the sustainable luxury fashion industry, particularly within the Made in Italy sector. Including consultants in the interview group allowed us to obtain a broader, cross-sectional view of the sector, rather than one limited to the companies where the interviewed managers were employed. To maintain confidentiality, participants were assigned identifiers ranging from Interviewees 1 to 10, with full anonymity granted to both the individuals and the companies involved. Table 1 provides detailed information about the informants, including their organizational areas, company affiliation, years of experience, and gender.

Table 1. Overview of the Interviewees

Interviewee	Organization	Organizational area	Years of experience	Gender
I_1	Luxury Brand 1	Strategy	30	Male
I_2	Luxury Brand 1	Sustainability	7	Male
I_3	Luxury Brand 1	Branding	10	Male
I_4	Luxury Brand 2	Sustainability	8	Female
I_5	Luxury Brand 2	Corporate communication	16	Female
I_6	Luxury Brand 3	Sustainability	18	Male
I_7	Luxury Brand 3	Marketing	15	Female
I_8	Luxury Brand 4	Strategy	10	Male
I_9	Consulting Company 1	Strategy	22	Female
I_10	Consulting Company 2	Strategy	14	Female

The interviews were conducted via video conferencing systems between May and July 2024, with each session lasting an average of 50 minutes. To encourage spontaneous responses grounded in professional experience, an interview guide featuring open-ended questions alongside fixed data

was used. Specifically, the guide was organized into three key areas: 1) the role of the country image (i.e., Made in Italy) in their marketing strategies (e.g., "What are the key attributes commonly associated with Made in Italy in the luxury fashion industry?" or "How does the Made in Italy influence your brand positioning?"); 2) the role of sustainability in their marketing strategies (e.g., "What are the key attributes typically associated with sustainability in the luxury fashion industry?" or "How does sustainability influence your brand positioning?"); and 3) the integration of country image and sustainability in their marketing strategies (e.g., "How do you combine Made in Italy with sustainability in your marketing strategy?"). The interview guide was tailored to align with the specific area of expertise of each interviewee. Adjustments were made to the wording and question sequence to suit the individual participant and the natural flow of conversation. This approach facilitated a dynamic and adaptive "orchestrated dialogue," as described by Arsel (2017).

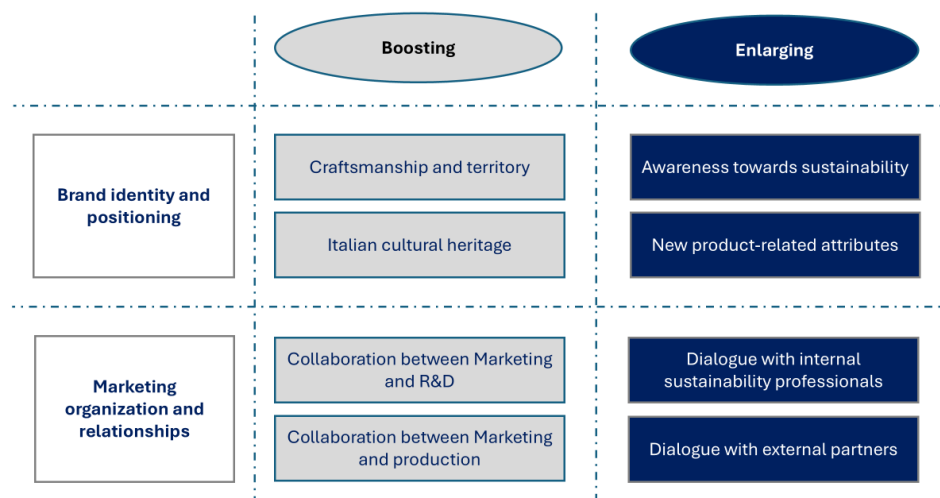
All interviews were transcribed, producing 85 pages of single-spaced content in 10-point font. To identify macro and subthemes, we adhered to the methodological guidelines outlined by King and Horrocks (2010). The process began with a line-by-line analysis of the transcripts to identify "descriptive codes," which are detailed, discrete themes. We then employed a logical progression of abstraction to define broader themes, moving from "interpretive themes" to "overarching themes."

Two members of the research team independently participated in the coding process, comparing their findings after each phase. To ensure the reliability of our analysis, two independent expert coders reviewed and confirmed the coding results (i.e., *code-confirming* approach) (King and Horrocks, 2010). The interjudge reliability was measured using the "agreement ratio" which yielded a satisfactory result of 88%, which exceeded the 80% cutoff (Miles et al., 2019).

4. Findings

The thematic content analysis identified two macro themes: *Brand Identity and Positioning* and *Marketing Organization and Relationships*. These themes emerged from subthemes (integrative codes) that illustrate how brands are integrating CI and sustainability into their marketing strategies. The analysis reveals that brands are *boosting* the elements traditionally associated with "Made in Italy" by enriching them with sustainability-related meanings and, at the same time, *enlarging* the elements of Made in Italy by adding sustainability-related aspects. The main findings are summarized in Figure 1, and the following section provides a detailed examination of these results.

Figure 1. The integration between sustainability and CI in Italian luxury brands



Source: own elaboration.

1) *Brand Identity and Positioning*

The intersection between sustainability and country image in the marketing strategies of Italian luxury fashion companies is evident, with clear objectives aimed at enhancing brand identity and positioning. Many interviewees emphasize that brands successfully integrating these dimensions are better equipped to meet the evolving demands of consumers, as luxury buyers increasingly seek products that offer both ethical value and cultural authenticity. This synergy not only differentiates Italian luxury brands from their competitors but also allows them to maintain their status in a market where sustainability is becoming essential for success. The integration between CI and sustainability occurs in two ways: on one hand, through the strategic *boosting* of attributes typically associated with "Made in Italy," which are now imbued with sustainability aspects; on the other hand, through an *enlarging* process, with the addition of sustainability elements that are now an integral part of "Made in Italy". In particular, brands are integrating CI and sustainability by *boosting* attributes of territory, craftsmanship, and culture, while also *enlarging* awareness towards sustainability and fostering new product-related attributes.

- *Boosting craftsmanship and territory*: As emerges from the interviews, one of the main ways in which brands are strategically integrating CI and sustainability is by enhancing aspects linked to craftsmanship and territory. *"Italian luxury brands have always emphasized their origin, leveraging the positive perception of our craftsmanship around the world...now, Made in Italy means also sustainability"* (I_10). The craftsmanship of "Made in Italy" is already recognized worldwide as synonymous with quality, excellence, and uniqueness of the products; now brands are boosting these aspects with meanings related to sustainability. In particular, brands are strengthening their deep connection with the territory by emphasizing production practices that respect the environment and support local communities. Positioning is being reinforced with communication that emphasizes precisely the focus on production as a reminder of little waste and on people as a reference to social responsibility *"In recent years there has been an increase in marketing communications on crafts, you make beautiful videos where you can see your hands...it also gives the idea of little waste, it gives you the idea of the time devoted to the subject, to the product, because sustainability is not only environmentally responsible but also does not exploit people and there is a nice working environment"* (I_7).
- *Boosting Italian cultural heritage*: Italian luxury brands have long highlighted cultural peculiarities, from traditional customs to artistic heritage, valorizing them as strategic resources to improve the identity and positioning of the brand. This is now reinforced by adding sustainability. The Italian origin of products becomes an integral part of the brand identity, attracting consumers who value heritage and authenticity and allowing brands to command premium prices. From the interviews, aspects of Italian culture emerge such as style, light-heartedness, and elegance as important in the positioning of the brand. *"Sometimes Made in Italy can be associated with the old... but among our competitors there are few, today, who do not underline the Italianity in the positioning and brand identity... the stereotypes, the spaghetti and the mandolin they also serve to give a sense of irony, and it works!... Italian culture is full of positive meanings...also sustainability"* (I_7). Italian culture is also warmth and inclusiveness *"We have offices in the whole world and what sets us apart is our inclusive and welcoming style"* (I_5). Marketing strategies that leverage the country's image are characterized by social sustainability elements such as inclusiveness and attention to people's needs. This allows brands to achieve a positioning and brand identity that is both "Made in Italy" and sustainable.
- *Enlarging awareness towards sustainability*: Italian luxury brands are integrating sustainability into their brand values, making it part of their core identity. Many interviewees emphasized unconscious sustainability *"We have sustainable practices even if we are not aware of them"* (I_1); today brands are equipping themselves with awareness. This awareness is leading a large number of brands to expand their efforts to educate consumers and stakeholders on sustainability. In this way, brands change their identity

and positioning adding sustainability. Many brands have launched campaigns that explain the environmental impact of fashion, intending to foster a deeper bond with consumers who give priority to ethical consumption. *"We are increasingly educating our customers on why sustainability matters, not only for the environment but also for the future of fashion"* (I_5).

- *Enlarging new product-related attributes:* Companies are actively incorporating innovative materials and production methods that reflect a commitment to sustainability. In particular, Italian luxury brands are sourcing locally sustainable materials such as Apulian cotton and Calabrian silk, which are processed using environmentally friendly methods. *"The use of sustainable raw materials has become central in the narrative of luxury brands, even more if they come from Italy"* (I_9). These materials are positioned as a blend of tradition and innovation, reinforcing the brands' luxury positioning while appealing to eco-conscious consumers. Additionally, companies are exploring new technologies for product longevity, encouraging consumers to purchase fewer but higher-quality products. This shift in focus aligns with the broader trend of slow fashion, which emphasizes sustainability in the entire product lifecycle—from design to disposal. The strategy of enlarging product-related attributes therefore supports the narrative of luxury made in Italy, aligning with sustainability values.

2) Marketing organization and relationships

The relationship theme plays a crucial role in the intersection between Country Image (CI) and sustainability for Italian luxury brands. These relationships, both internal and external, are important for brands that want to remain competitive in global markets. By strengthening existing partnerships and expanding into new ones, companies are better able to align their strategies with sustainability goals in different ways:

- *Boosting collaboration between marketing and R&D:* Italian fashion brands are intensifying their dialogue with R&D, emphasizing the importance of changing processes and introducing innovative techniques for sustainability. Although the costs are daunting, marketing strategies are aimed at emphasizing sustainable innovation. *"The most constant dialogue with research and development is necessary to enhance aspects of made in Italy such as creativity and innovation that today is focused on sustainability"* (I_3).
- *Boosting collaboration between marketing and production:* Collaboration between luxury brands and their manufacturing partners is increasingly focused on sustainable practices. The marketing function is working more closely with production to ensure that traditional crafts are preserved while integrating environmentally responsible processes. *"Made in Italy evolves with sustainable production methods, but we are committed to the quality and excellence that define our identity"* (I_4). This close collaboration ensures that sustainability is integrated throughout the supply chain, from sourcing materials to assembling the final product, allowing brands to maintain their high standards while addressing environmental issues.
- *Enlarging the dialogue with internal sustainability professionals:* Many companies are creating or expanding internal departments dedicated to sustainability, involving professionals in decision-making processes at all levels of the organization *"Mine is a new figure dedicated to the sustainability of the entire group"* (I_6). *"We have integrated sustainability into every department, from design to marketing, because it is no longer a separate initiative; it is part of who we are"* (I_7). This approach ensures that sustainability is considered in all aspects of business, promoting a more holistic approach to integrating sustainability. This constant dialogue of marketing with the internal professionals of sustainability allows the creation of more conscious and profound marketing strategies that see sustainability as an element that is added to the image of Made in Italy.
- *Enlarging the dialogue with external sustainability partners:* In addition to internal efforts, brands are also expanding their collaboration with external sustainability experts. This

includes partnerships with NGOs, technological experts, sustainability consultants, and academic institutions, which help brands stay at the forefront of industry standards and innovations. "*We've been working closely with environmental organizations to refine our processes and make sure that what we do not only meets but exceeds current sustainability standards*" (I_4). This broadened dialogue with external professionals allows companies to continuously evolve their practices and maintain a leadership role in sustainable luxury fashion while ensuring that they stay aligned with global sustainability trends and consumer expectations.

5. Conclusion

This study sheds light on how Italian luxury fashion brands are strategically integrating sustainability with CI, specifically the "Made in Italy" brand, to enhance their competitive positioning in an evolving global market. Through the lens of the RBV, we identify sustainability and CI as key intangible assets that, when aligned, offer a significant advantage in today's market. Brands are strengthening traditional elements such as craftsmanship and cultural heritage by infusing them with sustainability, while also expanding their focus on eco-conscious materials and practices. This dual approach enhances brand identity and meets the demand for ethical luxury from consumers.

Our findings show that Italian luxury brands are strategically boosting and enlarging sustainability and CI elements to reinforce their identity and positioning. The strengthening of craftsmanship, cultural heritage, and local territorial connections with sustainability-related attributes allows these brands to meet the growing demands of eco-conscious consumers while preserving their traditional values of excellence and quality. Moreover, brands are increasingly incorporating sustainable materials and production methods that align with their luxury image, reinforcing their association with innovation, tradition, and ethical responsibility. The research also highlights the critical role of both internal and external relationships in this integration. Collaboration between marketing, R&D, and sustainability professionals, as well as partnerships with external stakeholders, fosters innovation and ensures alignment with global sustainability trends.

The study offers theoretical insights by bridging the gap between sustainability and CI, two areas often studied separately. Practically, it provides strategic guidance for luxury brands on how to integrate sustainability without compromising their high-end positioning.

Adopting a managerial perspective, these findings emphasize the importance of balancing luxury with sustainability, leveraging the "Made in Italy" image. The applicability of these findings extends beyond the Italian luxury fashion industry, offering valuable implications for other high-end industries in Italy and abroad. Similar dynamics may be observed in other Italian luxury sectors, such as automobiles or furniture, which also draw heavily on the Made in Italy heritage and emphasize craftsmanship, innovation, and sustainability. These industries, like fashion, face growing consumer and regulatory pressures to align traditional excellence with environmentally responsible practices, creating opportunities for competitive differentiation through the integration of sustainability and country image.

The insights also hold relevance for luxury industries in other countries, such as France, where the *Made in France* label carries a comparable cultural and economic significance. French luxury fashion brands similarly face pressures to balance heritage with sustainability, offering an interesting basis for comparison. Cross-country studies could reveal whether the interplay between CI and sustainability yields comparable advantages in these contexts or if cultural and economic differences create unique dynamics.

Additionally, this research connects with existing studies that explore the relationship between luxury brands, country-of-origin effects (COO), and consumer reactions. Literature has shown that COO significantly influences consumer perceptions of quality and authenticity, particularly in luxury goods (Samiee et al., 2024; Magnusson et al., 2015). Studies focusing on the role of ecological and sustainability-oriented country reputations further emphasize how a positive CI enhances consumer trust and willingness to pay a premium (Dekhili and Achabou, 2021). By integrating these insights

with the findings of this study, future research could explore how CI and sustainability intersect to shape consumer decision-making across diverse cultural and geographic markets.

The primary limitation of this research lies in its reliance on a limited sample of experts, which restricts the generalizability of the findings. While the insights gained are valuable, they may not fully reflect the broader trends across the entire luxury fashion sector. To strengthen the robustness of the results, future studies could expand the scope by including a wider range of luxury fashion brands, as well as consulting experts from these brands. Additionally, involving consultants from industry associations, could provide further insights into industry-wide practices. Moreover, a comparative study across other luxury sectors, specifically within the Made in Italy context, could be conducted, incorporating brands in high-end automobiles or luxury watches. This would allow for a more comprehensive understanding of the interplay between country image and sustainability across different luxury categories. In this way, further studies could explore other luxury sectors to generalize these findings and investigate the long-term impact of sustainability on competitive advantage.

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