



# European Fashion Report 2021

Are consumers ready to have more sustainable shopping habits?

**YouGov**<sup>®</sup>

[business.yougov.com](https://business.yougov.com)

# Summary

1. Methodology
2. Sectors where sustainability is the most important criteria when buying clothes
3. Criteria when buying clothes
4. Importance of sustainability when buying clothes
5. The second life of clothes
6. Spotlight on DACH, France and Nordics

# Methodology

# Methodology



## Sample

- 2021: the survey was conducted among 11,483 respondents representative of the national population in each country aged 18+
- 2019 : the survey was conducted among 9,250 respondents representative of the national population in each country aged 18+



## Methodology

- The survey was conducted online, on the YouGov proprietary panel



## Field work

- 2021 : France, Germany, Austria, Denmark, Finland, Italy, Norway, Spain, Sweden, Switzerland  
From September 10th to September 29th, 2021
- 2019 : France, Germany, Denmark, Finland, Italy, Norway, Spain, Sweden  
From October 23th to November 6th, 2019

# Sectors where sustainability is the most important criteria

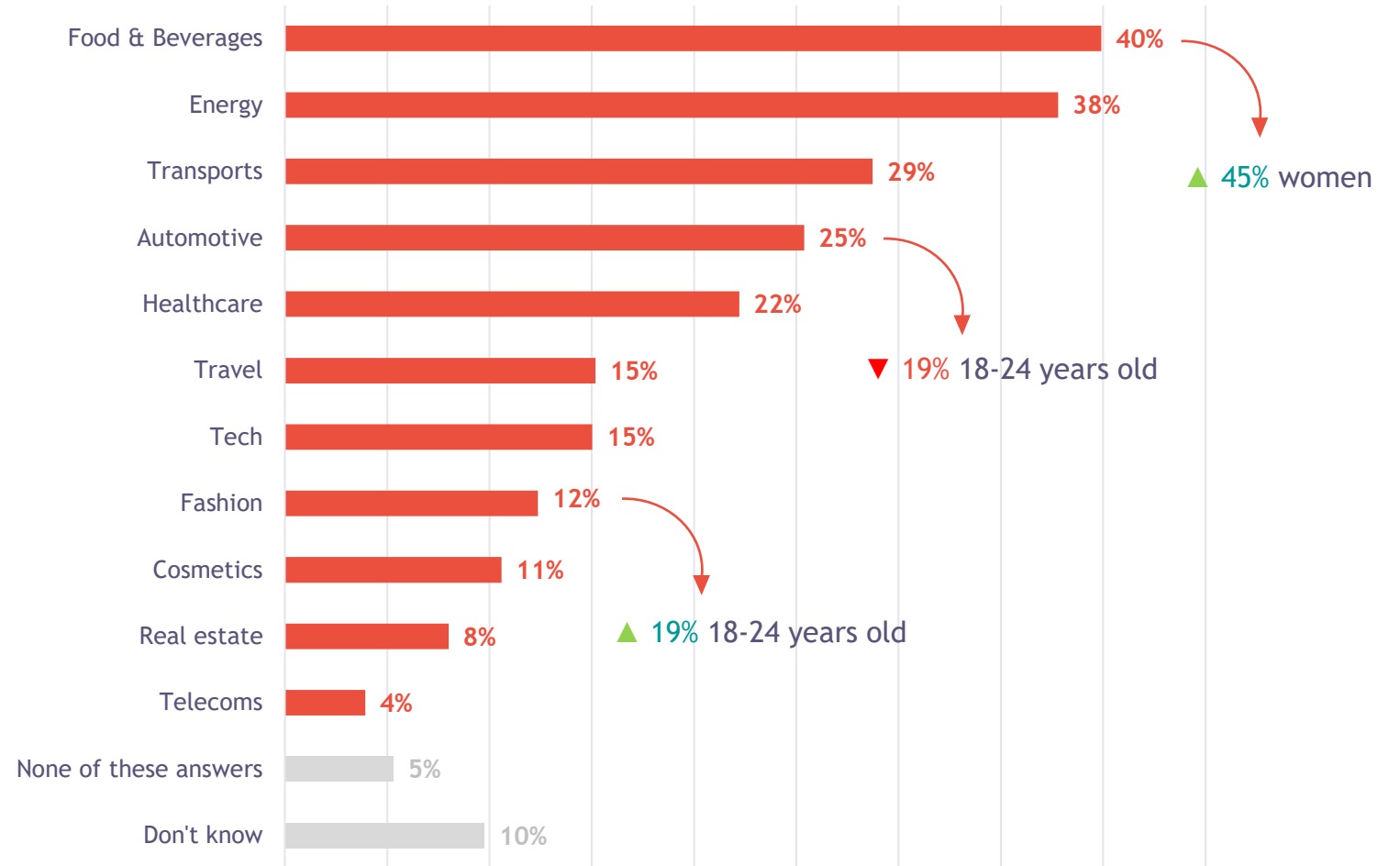
In Europe, only 12% of consumers perceive sustainability to be especially important in the fashion sector

# At a European level, sustainability is perceived to be especially important in the food & beverage and energy sectors

The fashion sector only ranks 8th, with 12%, followed by cosmetics (11%), real estate (8%) and telecoms (4%).



## Ranking of sectors where sustainability is the most important criteria



In which sector is the criteria of sustainability the most important for you ? Please select up to three answers.  
 Base : adults from 10 countries (n=11 483)

▲ ▼ Statistically superior/inferior to European average

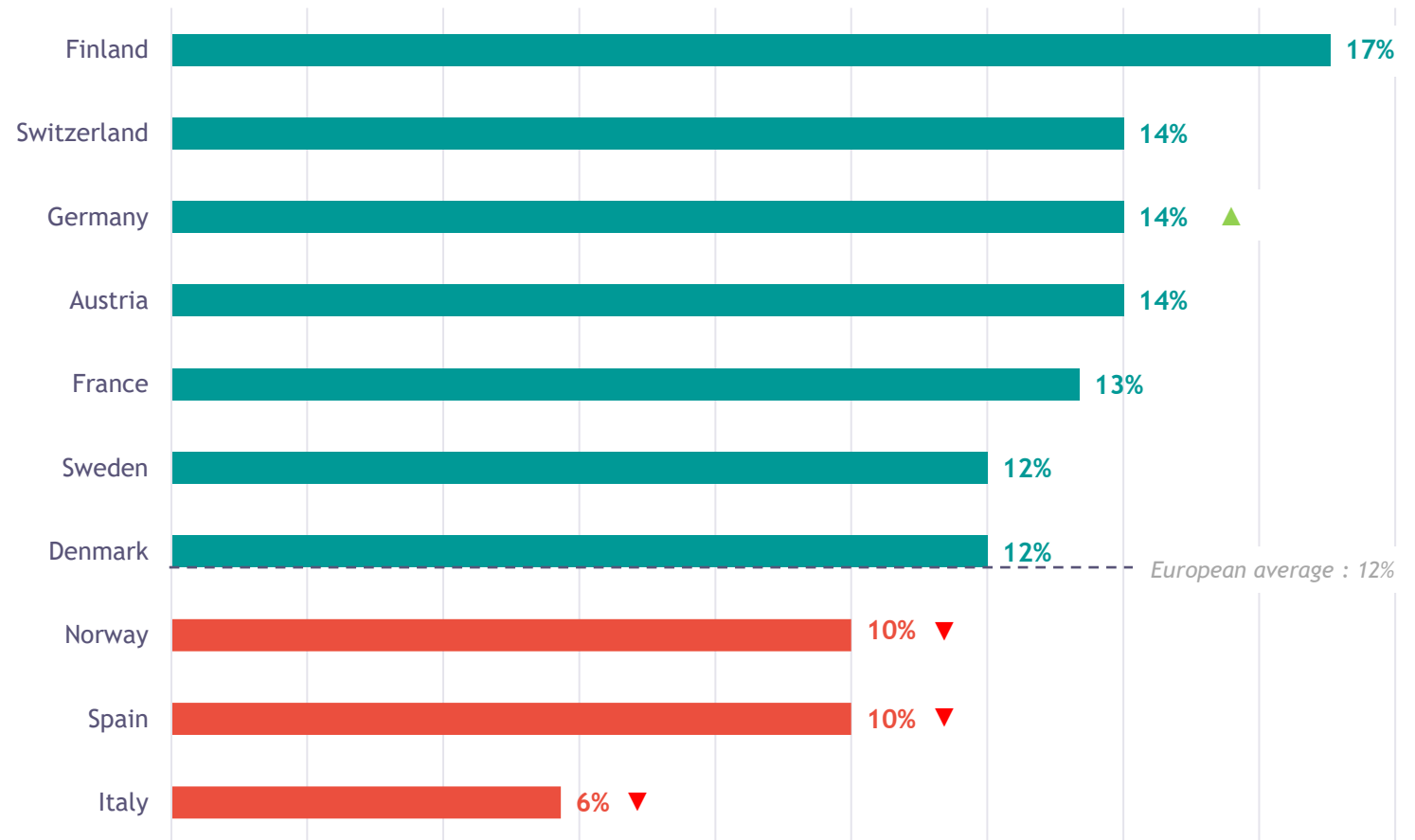
# Fashion sector: difference between countries

Significantly more Finnish(17%) and German (14%) respondents consider sustainability to be important in the fashion sector.

Conversely, Italians (6%), Spaniards (10%) and Norwegians (10%) are significantly less likely to mention this sector.



## Ranking of countries regarding the importance of sustainability in the fashion sector



In which sector is the criteria of sustainability is the most important for you ? Please select up to three answers.  
Base : adults from 10 countries (n=11 483)

▲ ▼ Statistically superior/inferior to European average

# Criteria when buying clothes

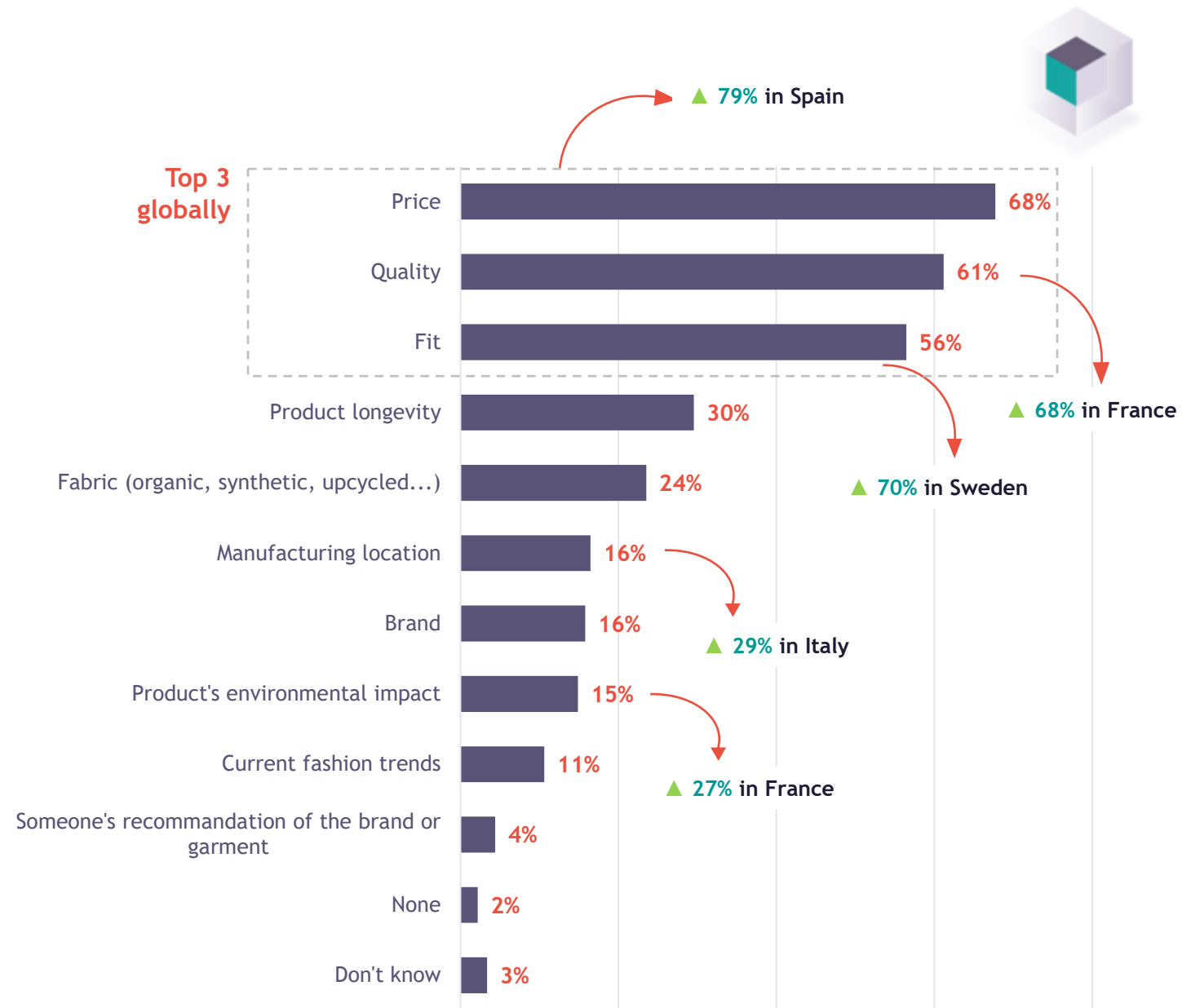
Price (68%) is the most important criteria for European consumers when buying clothes



# Criteria when buying clothes

Price (68%) is the most important criteria for European consumers when buying clothes, followed by quality (61%) and fit (56%).

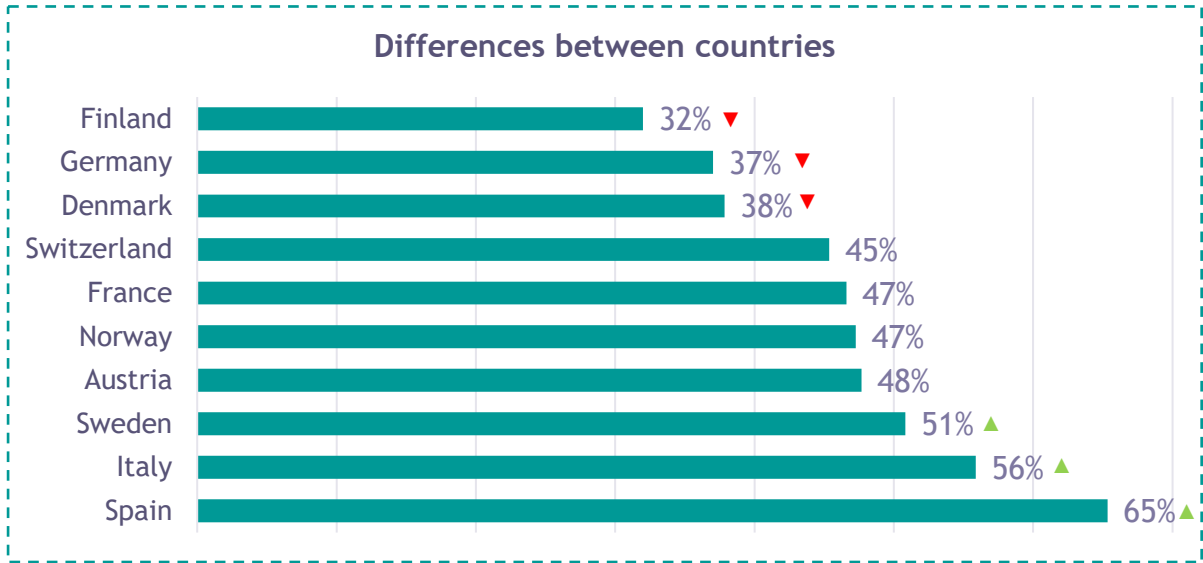
A product's environmental impact is only important for 15% of European consumers, however this criteria appears to be far more important among French shoppers (27%).



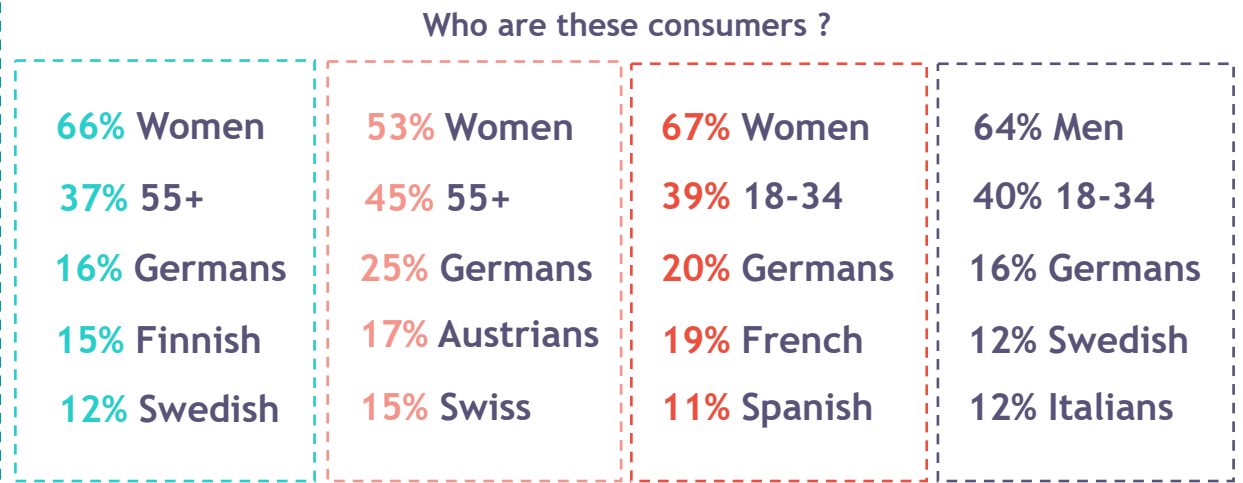
What are your criteria(s) when you buy clothes? Please select all that apply.  
Base : adults from 10 countries (n=11 483)

▲ ▼ Statistically superior/inferior to European average

# Where do people prefer buying clothes ?



17% of Europeans buy their clothes in second hand shops, 17% from ethical brands, 12% on resale apps and 6% from luxury brands.



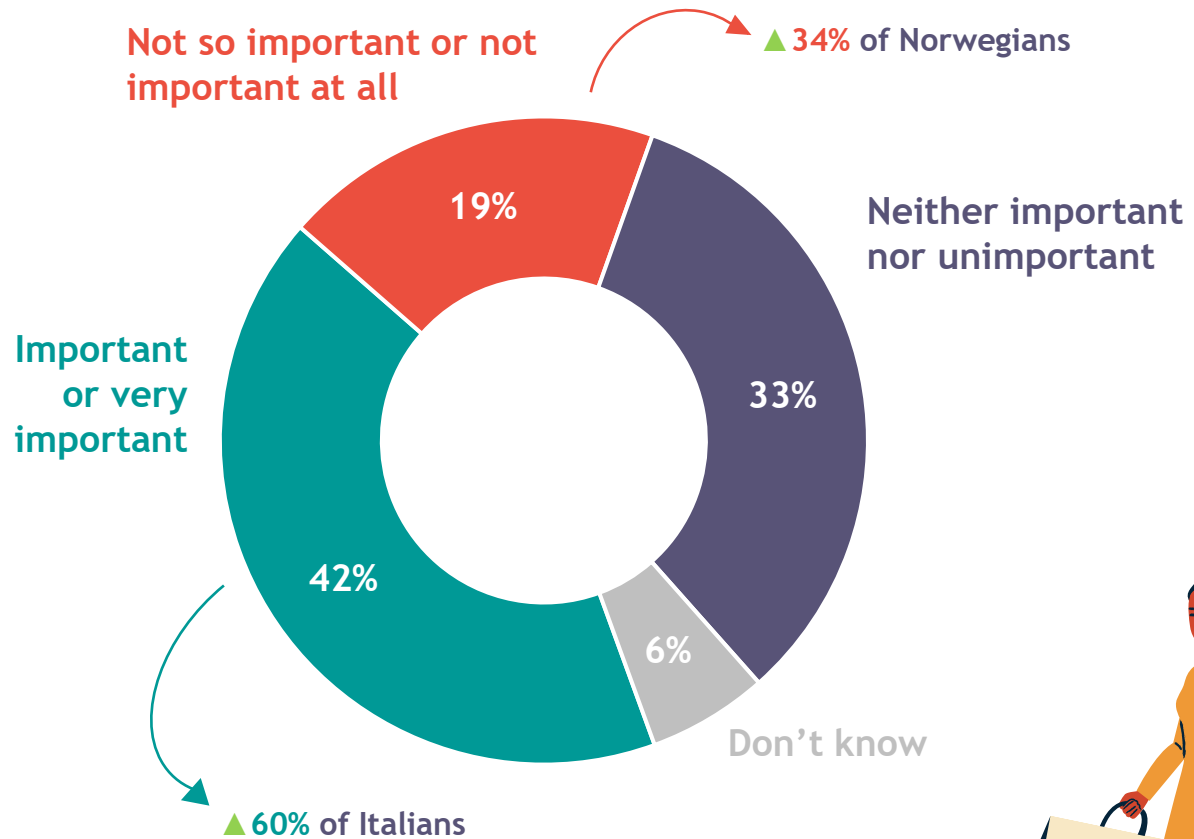
# Importance of sustainability when it comes to clothes

1 in 10 global consumers consider buying ethical and sustainable clothes to be very important

# In Europe, 42% of consumers consider buying ethical and sustainable clothes to be very important

At a national level, **Italians** (60%) and **Spaniards** (56%) are particularly convinced.

On the other hand, people from **Nordic countries** are the most likely to say buying ethical and sustainable clothes is not important (34% in **Norway**, 27% in **Denmark**, 26% in **Sweden** and 22% in **Finland**).



Only, 1 in 10 consumers consider buying ethical and sustainable clothes to be **very** important (10%)



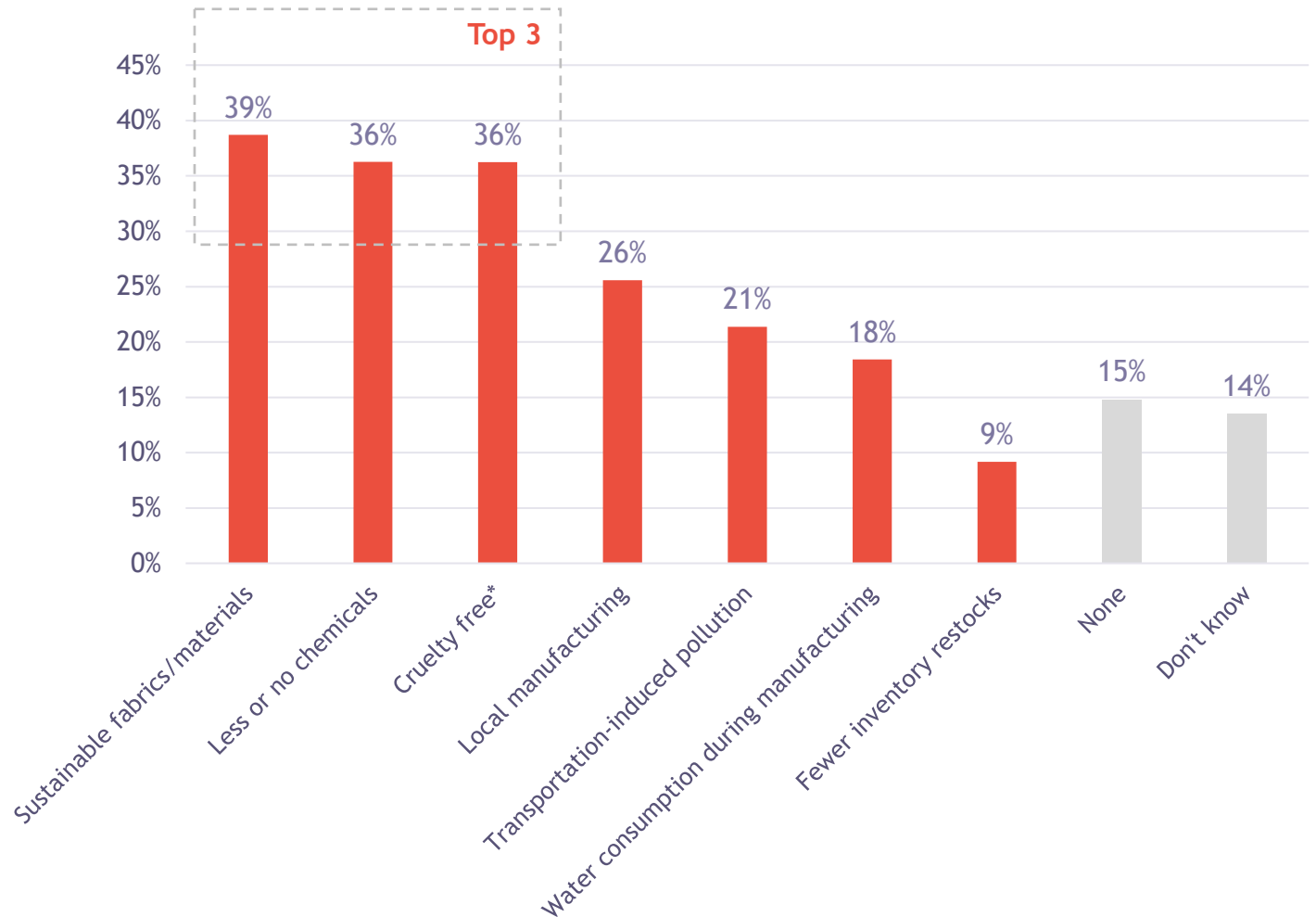


# Important eco-friendly elements when buying clothes

Sustainable fabrics and materials is the most important eco-friendly criteria when buying clothes (39%).

Less or no chemicals (36%) and cruelty free labels (36%) are also perceived as important by more than 1 in 3 European consumers.

*\*Cruelty free : products or activities that do not harm or kill animals anywhere in the world*

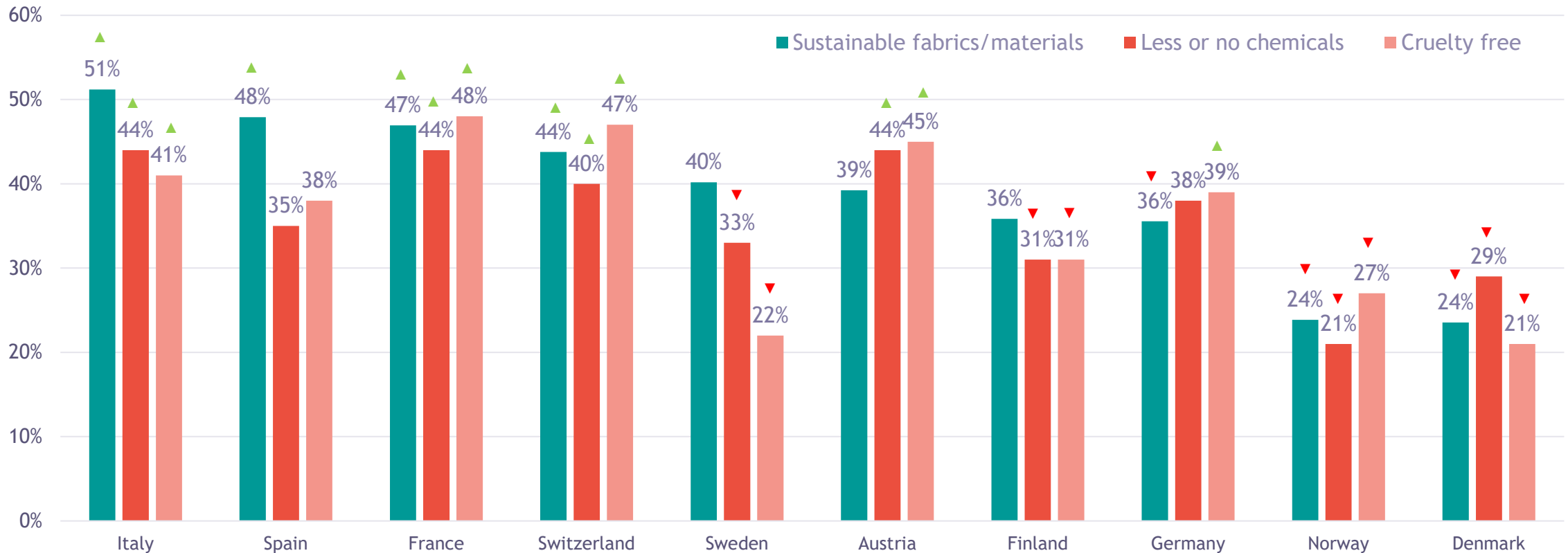


Which, if any, eco-friendly elements are important to you when you buy clothes? Please select all that apply.  
Base : adults from 10 countries (n=11 483)



## Eco-friendly elements - Focus on Top 3

**Sustainable fabrics and materials** is particularly important for Southern Europe countries : 51% of Italians, 48% of Spaniards and 47% of French consumers. It is about half as important in Norway (24%) and Denmark (24%). **Using less or no chemicals** is essential for French, Austrian and Italian shoppers, with 44%. **Cruelty free** certification is mainly supported by the French (48%), Swiss (47%) and Austrians (45%).





# What are the main barriers to buying ethical and eco-friendly clothes?



## The results of the survey show substantial differences between countries

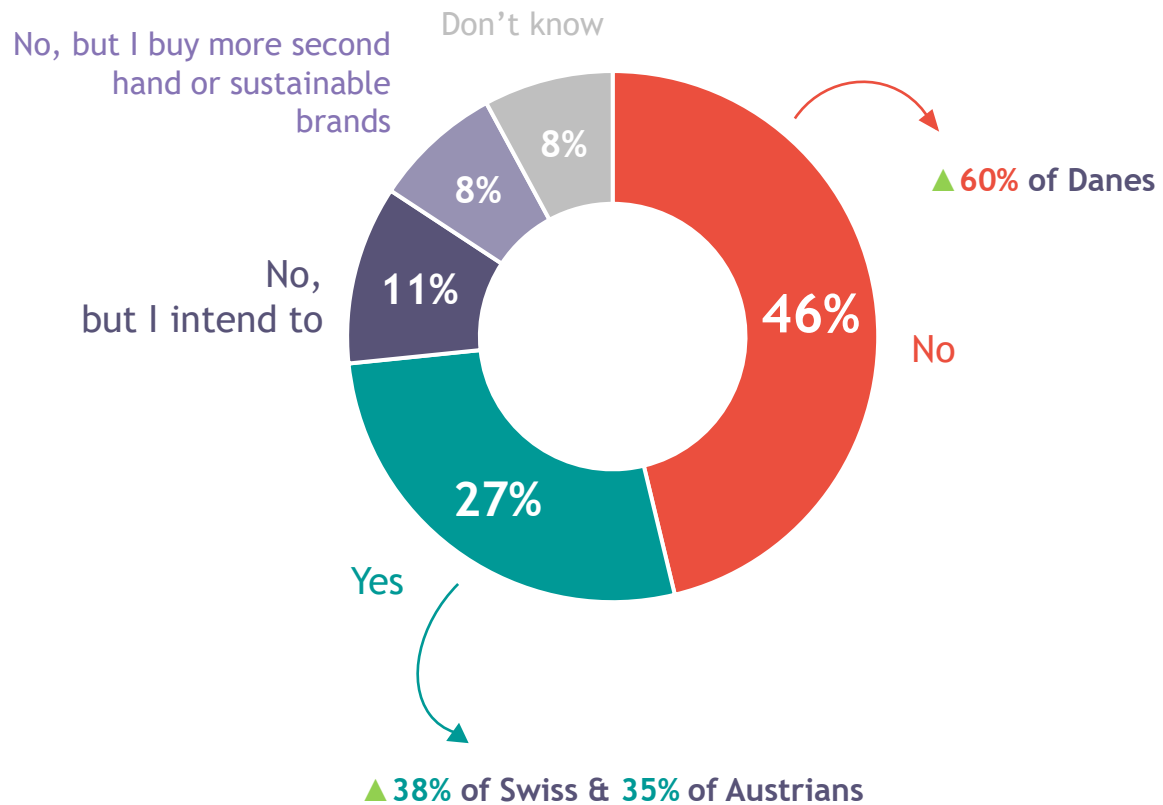
Where cost is the first barrier globally, that varies widely from 43% in **France** to 19% in **Denmark**.

The **Austrians** (39%) and **Finnish** (38%) are the most likely to think it is not clear which eco-friendly aspects are fulfilled vs. 12% of **French** consumers.

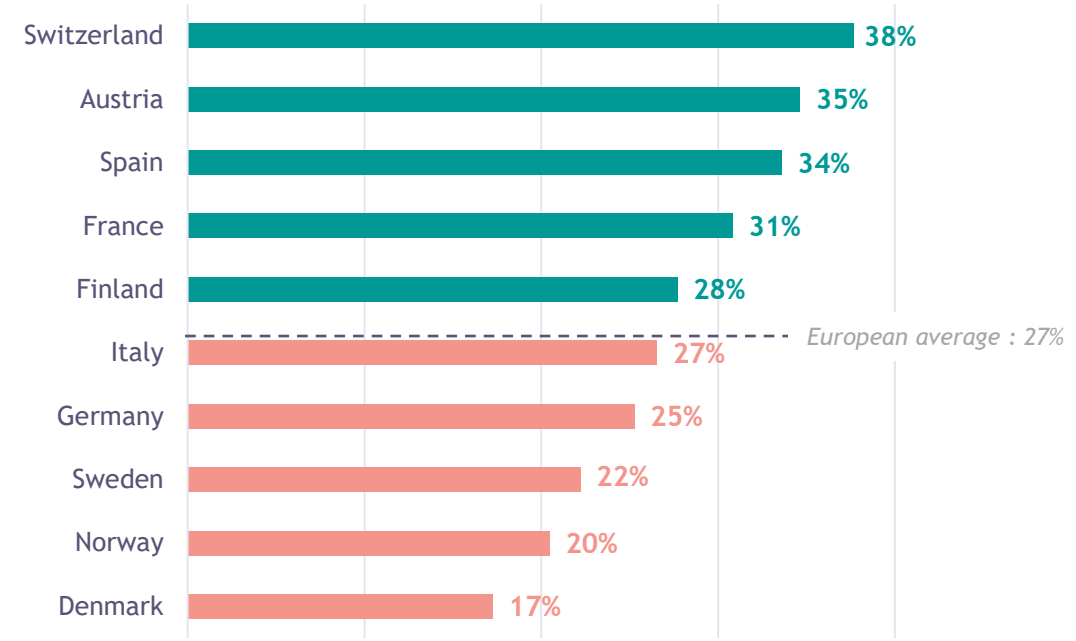
38% of **Austrians** and 36% of **Swiss** agree it is hard to discern eco-friendly brands where as only 3% of **French** agree.



# Do consumers reduce their clothing purchases for ethical reasons?



Less than 3 in 10 consumers have already reduced their clothing purchases for ethical reasons (27%)



Danish, Norwegians and Swedish are the least likely to say they have already reduced their clothing purchases for ethical reasons.



Have you ever reduced your clothing purchases for ethical reasons? Please select one answer.  
Base : adults from 10 countries (n=11 483)

▲ ▼ Statistically superior/inferior to European average

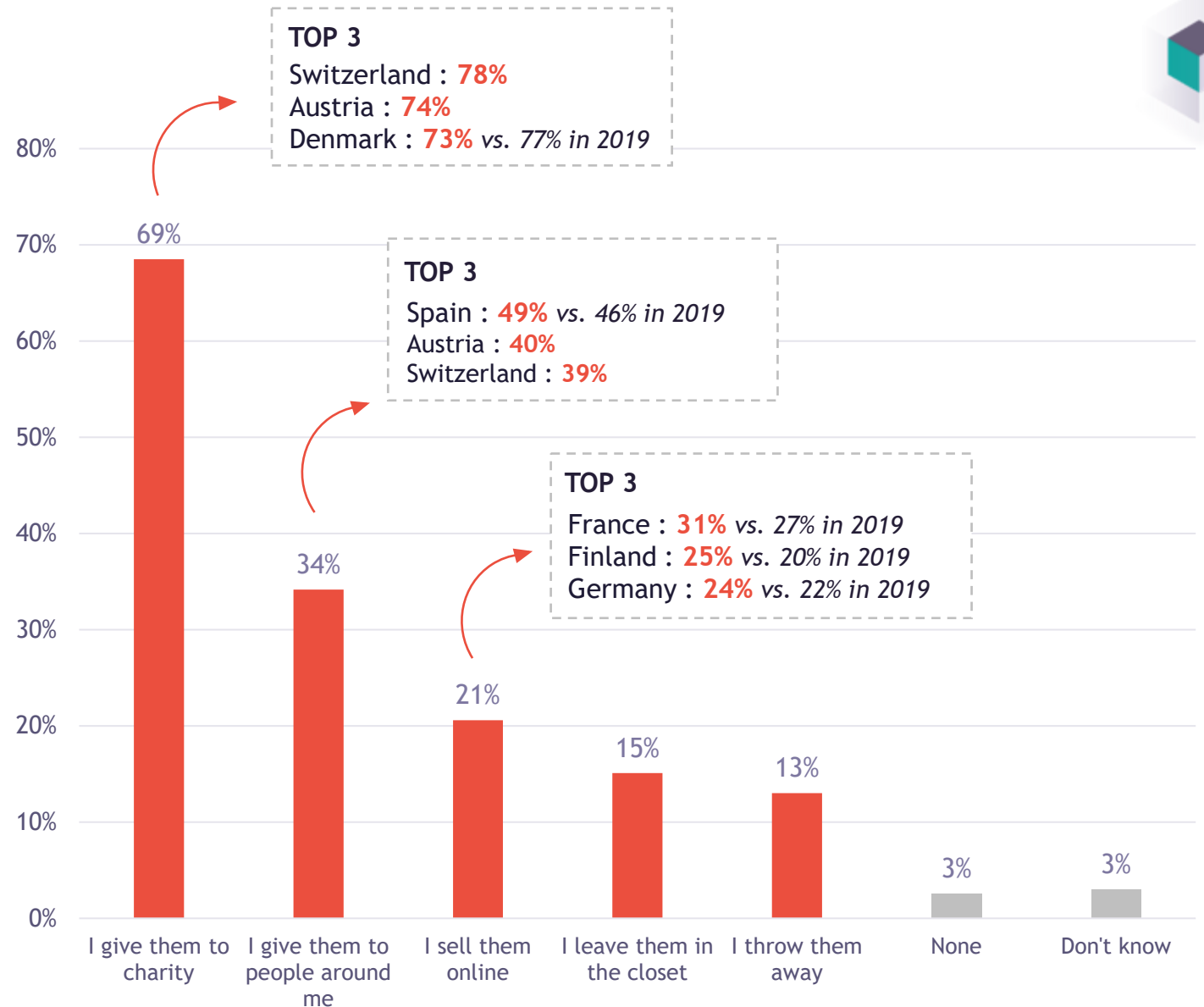


# The second life of clothes

21% of European consumers sell their clothes online

For the most part, consumers give the clothes they no longer wear to charity (69%) or to people around them (34%)

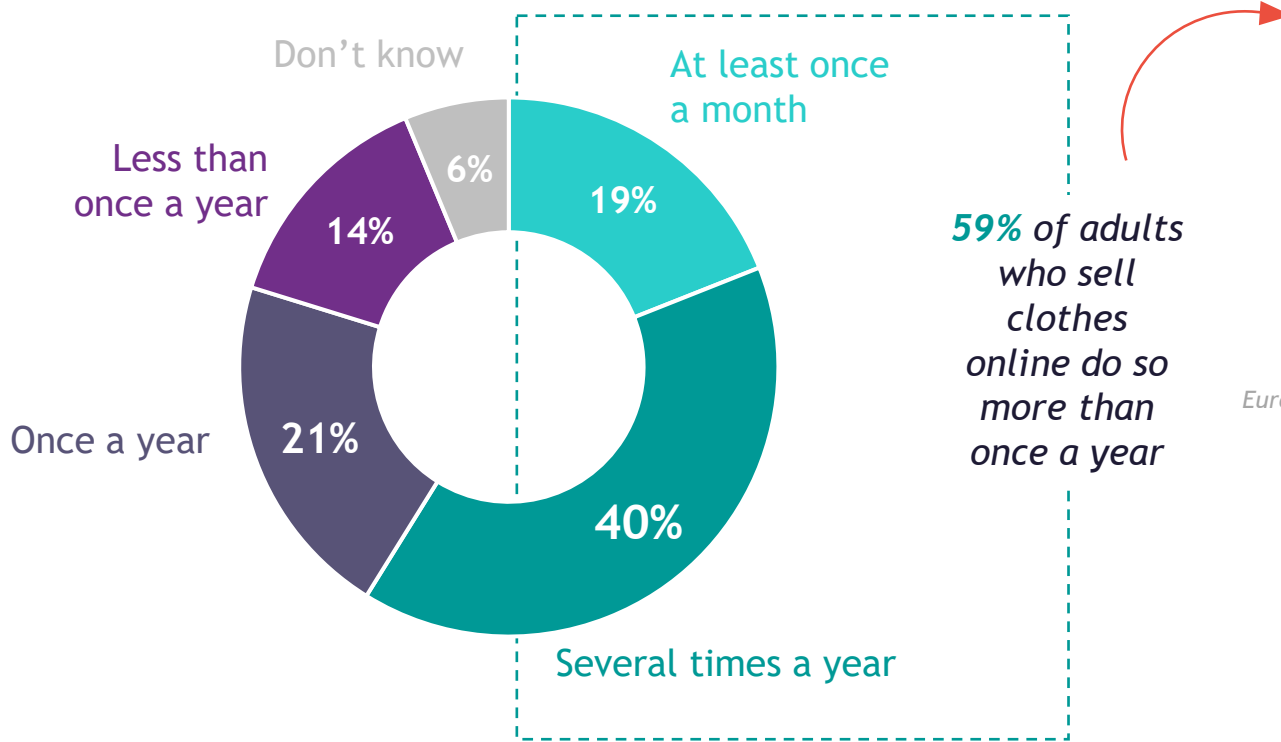
While donation to charity is particularly prevalent in Switzerland (78%), champions of online selling are French (31%), an increase of 4% since 2019.



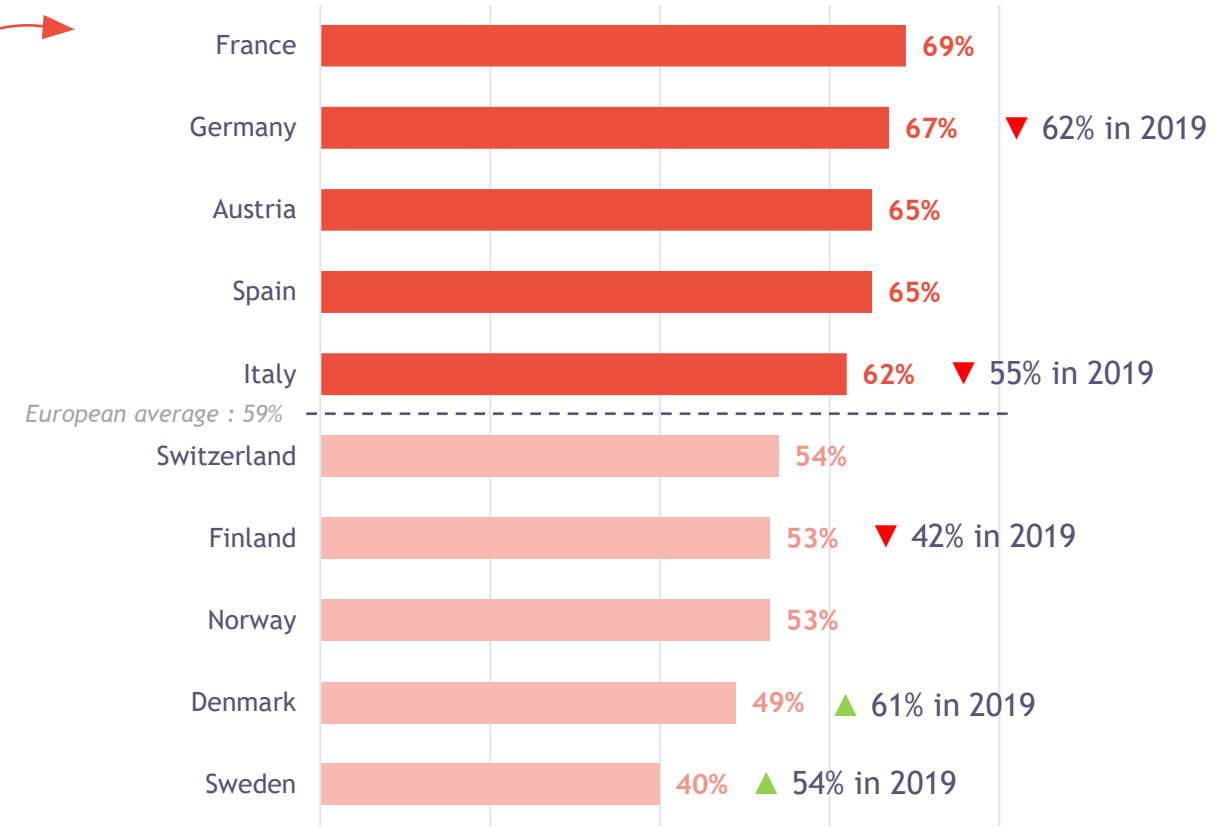
# People selling their clothes online : frequency, and differences between markets



## Online selling frequency in 2021



## Consumers who sell their clothes online more than once a year



How often do you sell your clothes? Please select one answer.  
 Base : adults from 10 countries who sell clothes online (n=2 372)

Base : adults from 10 countries who sell clothes online more than once a year (n= 1 406)  
 ▲ ▼ Statistically superior/inferior to 2021 results

# Spotlight on DACH

Trigema is perceived as the most sustainable fashion brand in Germany, H&M in both Austria and Switzerland.

On the following pages of the analysis, our Focus on DACH shows, which of the selected fashion brands are perceived as the most sustainable in Germany, Austria and Switzerland. In addition, a deep dive for Germany shows how the potential group of those Germans, who are willing to buy "slow fashion", looks like.

# Trigema and Jack Wolfskin are most often described as sustainable among Germans

Trigema scores particularly well among the population over 55 years old (19%).

45% say they don't know and 14% don't consider any of the 23 polled brands as at least partly sustainable.



## Germany



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	Trigema	13.8%
2	Jack Wolfskin	13.5%
3	Adidas	10.2%
4	Tchibo	9.9%
5	H&M	9.1%
6	The North Face	7.3%
7	Puma	7.1%
8	Hugo Boss	6.6%
9	Marc O'Polo	6.1%
10	S. Oliver	5.7%

▲ 19% over-55-year-olds

▲ 13% 18-24 years old

▲ 12% women

▲ 11% 18-24 years old

▲ 8% men

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from Germany (n=2.080)

The following 23 brands were polled: H&M, Adidas, Tchibo, Zara, Primark, Mango, CECIL, Stone Island, Ralph Lauren, Trigema, Jack Wolfskin, Converse, Shein, Benetton, Patagonia, Calvin Klein, Zalando, S.Oliver, Marc O'Polo, Hugo Boss, Nike, Puma, The North Face.

▲ ▼ Statistically superior/inferior to German average

# H&M is perceived as the most sustainable fashion brand in Austria

H&M scores particularly well among 25-34-year-olds (19%).

45% say they don't know and 14% don't consider any of the 21 polled brands as at least partly sustainable.



## Austria



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	H&M	14.1%
2	Jack Wolfskin	13.3%
3	Tchibo	11.5%
4	Adidas	11.0%
5	Nike	10.3%
6	The North Face	9.2%
7	Puma	7.8%
8	Hugo Boss	7.7%
9	Benetton	7.5%
10	S. Oliver	7.5%

▲ 19% 25-34 years old

▲ 15% women

▲ 14% men

▲ 18% 18-24 years old

▼ 4% women

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from Austria (n=1.002)

The following 21 brands were polled: H&M, Adidas, Tchibo, Zara, Primark, Mango, CECIL, Stone Island, Ralph Lauren, Jack Wolfskin, Converse, Shein, Benetton, Patagonia, Calvin Klein, S.Oliver, Marc O'Polo, Hugo Boss, Nike, Puma, The North Face.

▲ ▼ Statistically superior/inferior to Austrian average

# H&M is perceived as the most sustainable fashion brand in Switzerland

In Switzerland, H&M does particularly well among 18-24-year-olds (21%).

44% say they don't know and 14% don't consider any of the 17 polled brands as at least partly sustainable.



## Switzerland



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	H&M	16.0%
2	The North Face	12.7%
3	Jack Wolfskin	11.1%
4	Patagonia	10.2%
5	Adidas	10.1%
6	Nike	9.2%
7	Benetton	8.2%
8	Zara	7.3%
9	Puma	7.2%
10	Tchibo	7.0%

▲ 21% 18-24 years old

▲ 22% 18-24 years old

▲ 15% 35-44 years old

▲ 11% women

▲ 9% men

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from Switzerland (n=1.001)

The following 17 brands were polled : H&M, Adidas, Tchibo, Zara, Mango, CECIL, Stone Island, Ralph Lauren, Jack Wolfskin, Benetton, Patagonia, Calvin Klein, S.Oliver, Hugo Boss, Nike, Puma, The North Face.

▲ ▼ Statistically superior/inferior to Swiss average



# Which Germans show willingness to buy "slow fashion"

= switch to "slow fashion" (buy clothes with raw materials and working conditions that respect the environment and ethics) as environmentally responsible behavior

## Attitudes towards fashion and climate

**15%**  
of the German  
population



**84%** think that green energy is the future (vs. 68% of the total population)

**60%** try to buy only from companies that are socially and environmentally responsible (vs. 46% of the total population)

**75%** prefer to buy brands from the country they live in (vs. 66% of the total population)

**63%** say that their clothing style is an expression of their personality (vs. 57% of the total population)

**46%** say that fashion should be appropriate (vs. 40% of the total population)

**90%** DO NOT follow a fashion blog (vs. 86% of the total population)

## Socio-demographic profile



Men ▼ 45%    Women ▲ 55%

18-29 ▼ 12%    30-44 ▼ 20%    45-54 ▲ 22%    55+ ▲ 47%



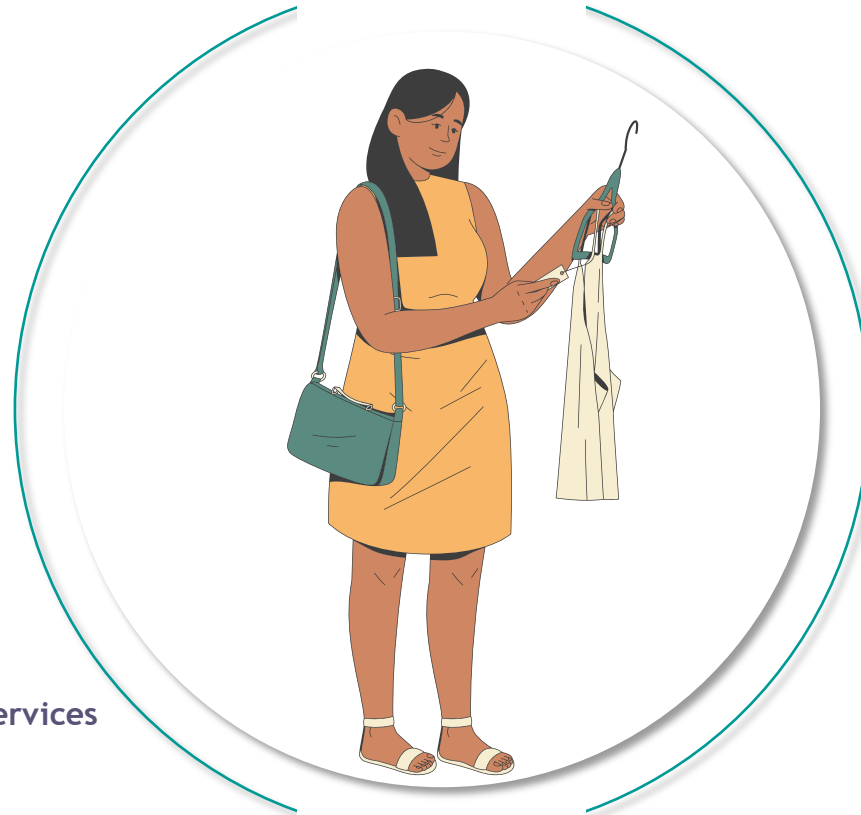
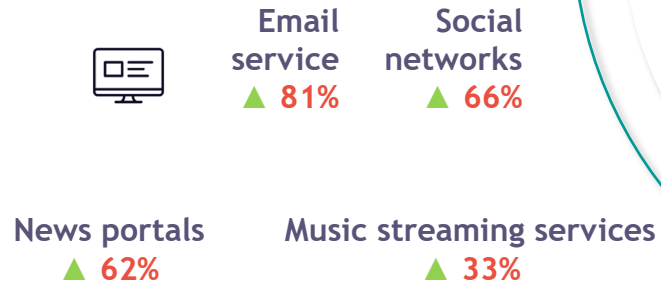


# Which Germans show willingness to buy "slow fashion"

= switch to "slow fashion" (buy clothes with raw materials and working conditions that respect the environment and ethics) as environmentally responsible behavior

## Opinions on brands and the use of media and the internet

Which of these online services does the target group use at least occasionally?



**83%** say that brands need to find innovative ways to market themselves and their products (vs. 75% of the total population)

**81%** say that brands must connect with customers in real life if they want to be successful today (vs. 75% of the total population)

**86%** say that there are moral limits to free markets (vs. 76% of the total population)

# Spotlight on France

H&M is perceived to be the most sustainable fashion brand in France

# H&M is perceived to be the most sustainable fashion brand in France

This is particularly prevalent for H&M among 18-24 year olds (24%).

42% of French consumers have no opinion and 16% believe none of these brands are at least partly sustainable.



## France



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	H&M	17%
2	Kiabi	14%
3	Celio	13%
4	Jules	13%
5	Zara	12%
6	C&A	11%
7	Etam	11%
8	Mango	9%
9	Devred	8%
10	Promod	8%

▲ 24% 18-24 years old

▲ 19% 25-34 years old

▲ 16% men

▲ 18% 18-34 years old

▲ 15% 25-34 years old

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from 10 countries (n=11 483)

The following 18 brands were polled: : H&M, Kiabi, Celio, Jules, Zara, C&A, Etam, Mango, Devred, Promod, Primark, Bershka, Uniqlo, Brice, Pimkie, Morgan, Jennyfer, Bizzbee

▲ ▼ Statistically superior/inferior to French average



# Profile of French people who say they have moved to “Slow Fashion”

= buy clothes with environmentally friendly and ethical raw materials and working conditions

**8%**  
of the French  
population



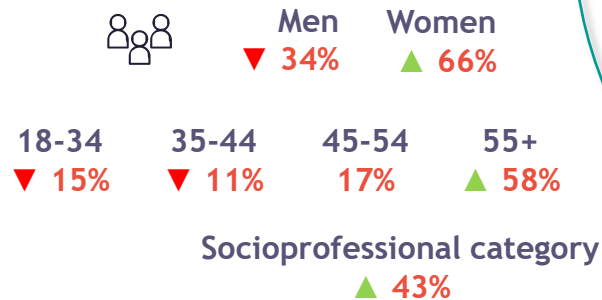
## Activities they like to do during their free time

- Reading **69%** (vs 48% nat rep)
- Watching TV **61%** (vs 60% nat rep)
- Cooking **61%** (vs 47% nat rep)
- Gardening **50%** (vs 38% nat rep)

## Communication channels that attract attention

- TV ads **46%** (vs 46% nat rep)
- Internet **39%** (vs 46% nat rep)
- In-store promotions **37%** (vs 30% nat rep)

## Socio-demographic profile



# Spotlight on the Nordics

Fjällräven is perceived to be one of the most sustainable fashion brand in the Nordics

# Fjällräven is perceived to be the most sustainable fashion brand in Denmark

66% of Danish consumers have no opinion and 11% believe none of these brands are at least partly sustainable.



## Denmark



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	Fjällräven	9%
2	H&M	8%
3	ECCO	7%
4	Haglöfs	4%
5	Adidas	3%
6	Tiger of Sweden	3%
7	Zara	2%
8	Jack & Jones	2%
9	Nike	2%
10	Vero Moda	2%

▲ 15% 18-29 years old

▲ 13% 18-29 years old

▲ 7% 18-29 years old

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from 10 countries (n=11 483)

Total number of brands : 23

▲ ▼ Statistically superior/inferior to Danish average

# Fjällräven is perceived to be the most sustainable fashion brand in Sweden

48% of Swedish consumers have no opinion and 7% believe none of these brands are at least partly sustainable.



## Sweden



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	Fjällräven	26%
2	Haglöfs	17%
3	ECCO	15%
4	H&M	14%
5	Adidas	11%
6	Nike	10%
7	Marimekko	8%
8	Tiger of Sweden	6%
9	Ellos	6%
10	Zara	5%

▲ 25% 18-29 years old

▲ 11% 30-39 years old

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from 10 countries (n=11 483)

Total number of brands : 23

▲ ▼ Statistically superior/inferior to Swedish average

# Fjällräven is perceived to be the most sustainable fashion brand in Norway

This is particularly prevalent for Fjällräven among 18-29 year olds (20%).

55% of Norwegian consumers have no opinion and 12% believe none of these brands are at least partly sustainable.



## Norway



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	Fjällräven	14%
2	H&M	12%
3	ECCO	10%
4	Adidas	8%
5	Nike	7%
6	Haglöfs	5%
7	Zara	5%
8	Tiger of Sweden	5%
9	Ellos	4%
10	Vero Moda	4%

▲ 20% 18-29 years old

▲ 18% 30-39 years old

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from 10 countries (n=11 483)

Total number of brands : 23

▲ ▼ Statistically superior/inferior to Norwegian average



# Finlayson is perceived to be the most sustainable fashion brand in Finland

This is particularly prevalent for Finlayson among females (32%).

49% of Finnish consumers have no opinion and 6% believe none of these brands are at least partly sustainable.



## Finland



RANKING - SUSTAINABLE FASHION BRANDS		
Rank	Brand	Score
1	Finlayson	26%
2	Marimekko	24%
3	Fjällräven	20%
4	ECCO	10%
5	Adidas	10%
6	H&M	10%
7	Haglöfs	10%
8	Nike	8%
9	Ellos	4%
10	Vero Moda	4%

▲ 32% Female

▲ 16% 40-49 years old

Which of these brands do you AT LEAST PARTLY consider to be sustainable? Please select all that apply.

Base : adults from 10 countries (n=11 483)

Total number of brands : 23

▲ ▼ Statistically superior/inferior to Finnish average

→ Thank you

**YouGov**<sup>®</sup>

YouGov, 2021, all rights reserved. All materials contained herein are protected by copyright laws.

Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited.

This information (including any enclosures and attachments) is propriety and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided.

We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.