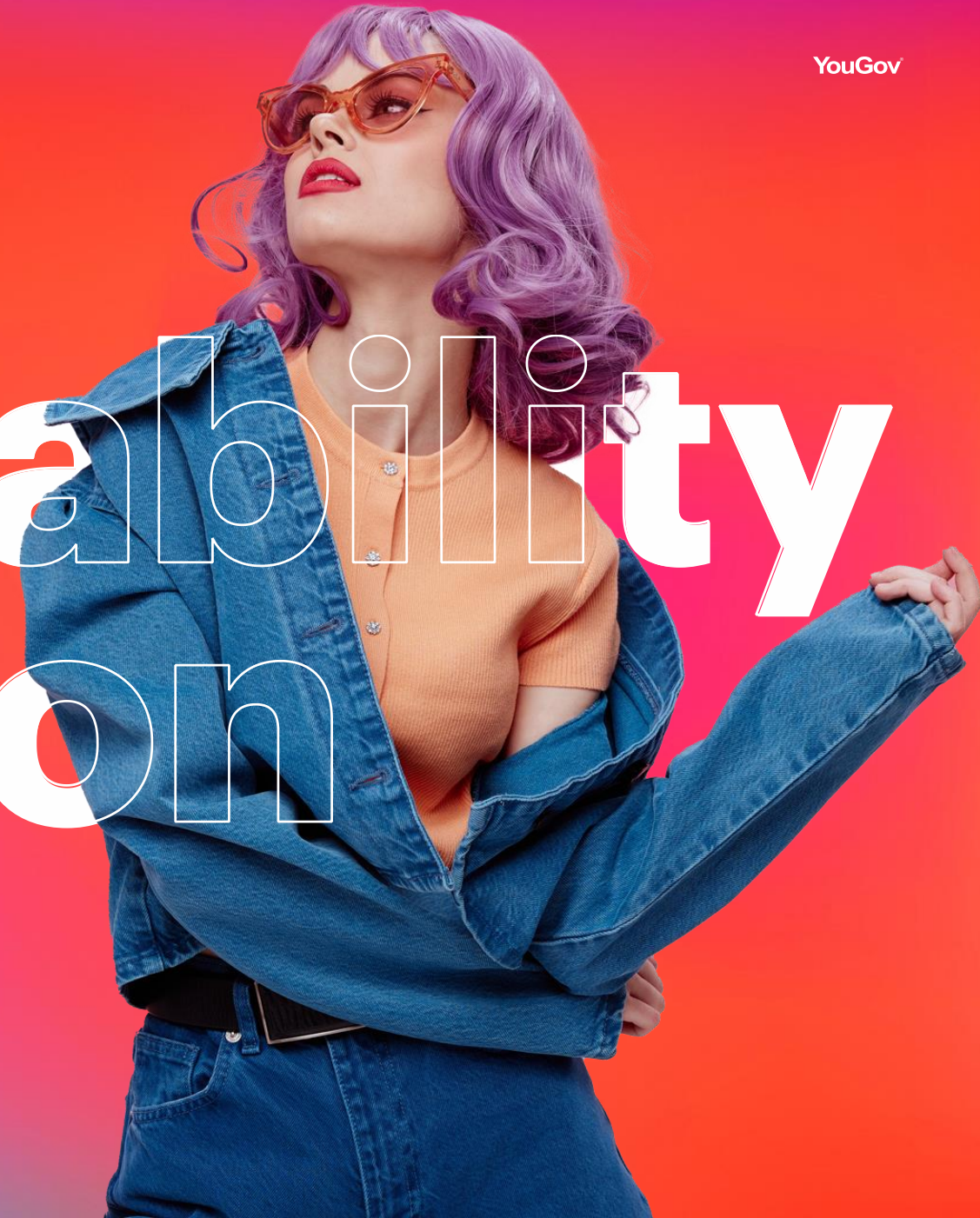


Sustainability in Fashion

Part 1: Market Status

France, GB, Italy, Germany, USA





- 01** YouGov: Who we are
- 02** About this research
- 03** What do shoppers think about sustainable fashion?
- 04** Purchase funnel barriers & motivations
- 05** Sustainable expectations

The data behind this research



Online survey on YouGov panel



National representative sample of adults (over 18y/o)

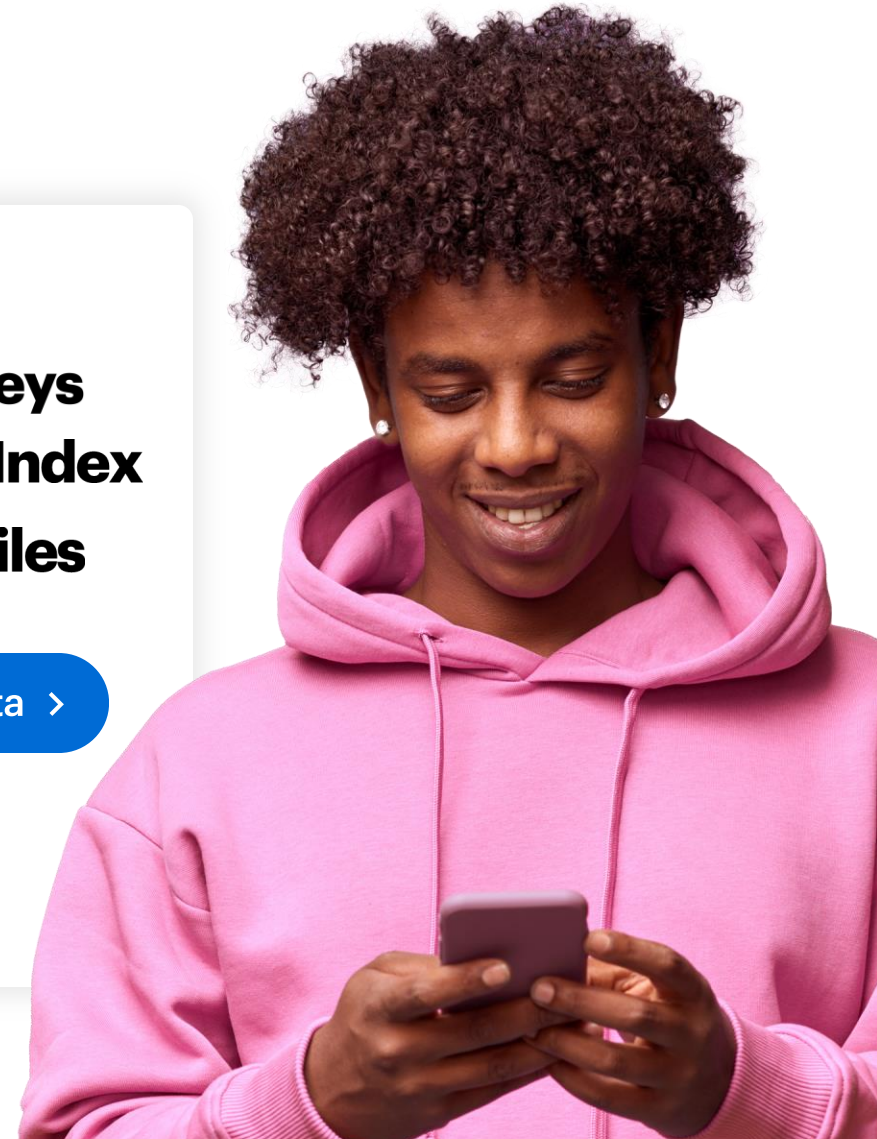
- USA N=3132
- GB N=2008
- France N=2940
- Germany N=1949
- Italy N=2027



Fieldwork: March 2023

YouGov Surveys
YouGov BrandIndex
YouGov Profiles

[Explore living data >](#)



Living data

An ever-growing source of constantly evolving, connected intelligence. YouGov unlocks what your consumers were thinking today, yesterday, or 5 years ago.



What do shoppers think about sustainable fashion?



Nat Rep (%)

Consumers remain heavily involved in the fashion market as **7 in 10 globally** have purchased multiple articles of clothing in the past year.



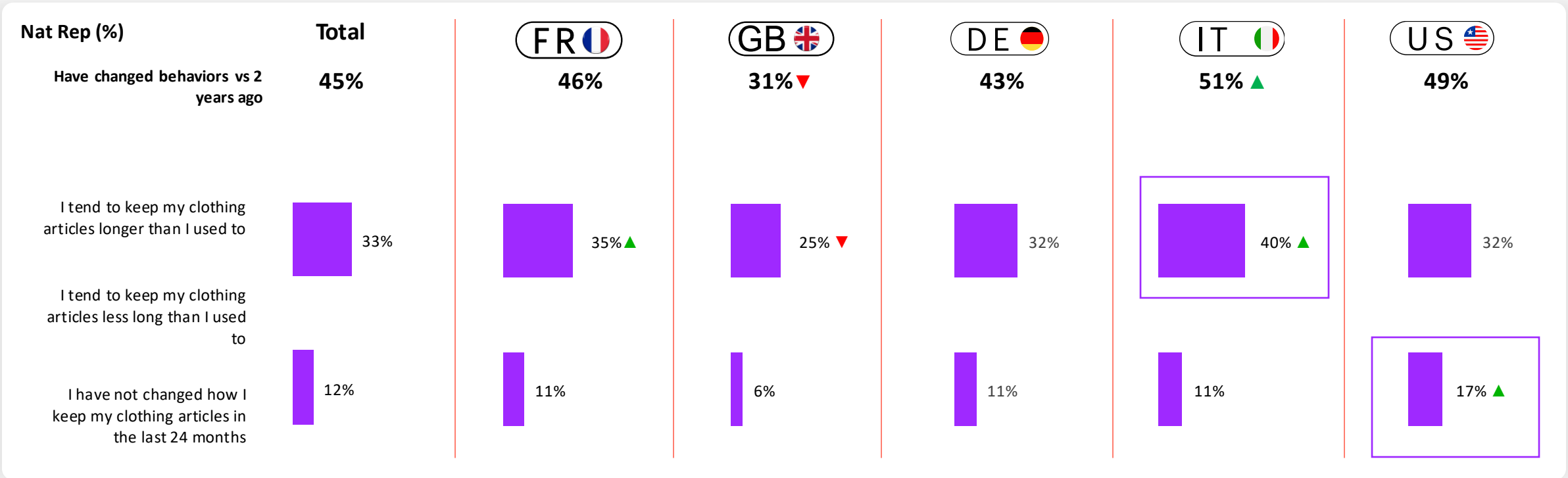
Perhaps unsurprisingly due to its reputation for fashion, Italy boasts the highest proportion of consumers who purchased clothing in the past year, leading the other countries measured in all categories except sportswear.

What type of clothing articles have you purchased for yourself in the past 12 months?

Nat Rep (%)	France	GB	Germany	Italy	USA
More than one category	73%	72%	69% ▲	79% ▲	67% ▲
Clothes (e.g. trousers, jeans, tops..)	71%	77% ▲	73%	79% ▲	58% ▲
Shoes / Trainers	63%	60%	59% ▲	71% ▲	59% ▲
Underwear, lingerie	49%	49%	51%	56% ▲	47% ▲
Accessories (e.g. belts, hats, gloves...)	25% ▲	28%	25% ▲	36% ▲	31% ▲
Activewear / Sportswear	32% ▲	26%	20% ▲	20% ▲	30% ▲
Handbags	20%	14%	15%	29% ▲	21%
None of the above	8%	10%	9%	5% ▲	11% ▲

45% of global consumers indicated changing the duration of clothes ownership since the beginning of the COVID-19 pandemic, with Italians and French now keeping their clothes longer, and 2 in 10 Americans keeping them for a shorter period.

And compared to 24 months ago, which sentence best applies to you?

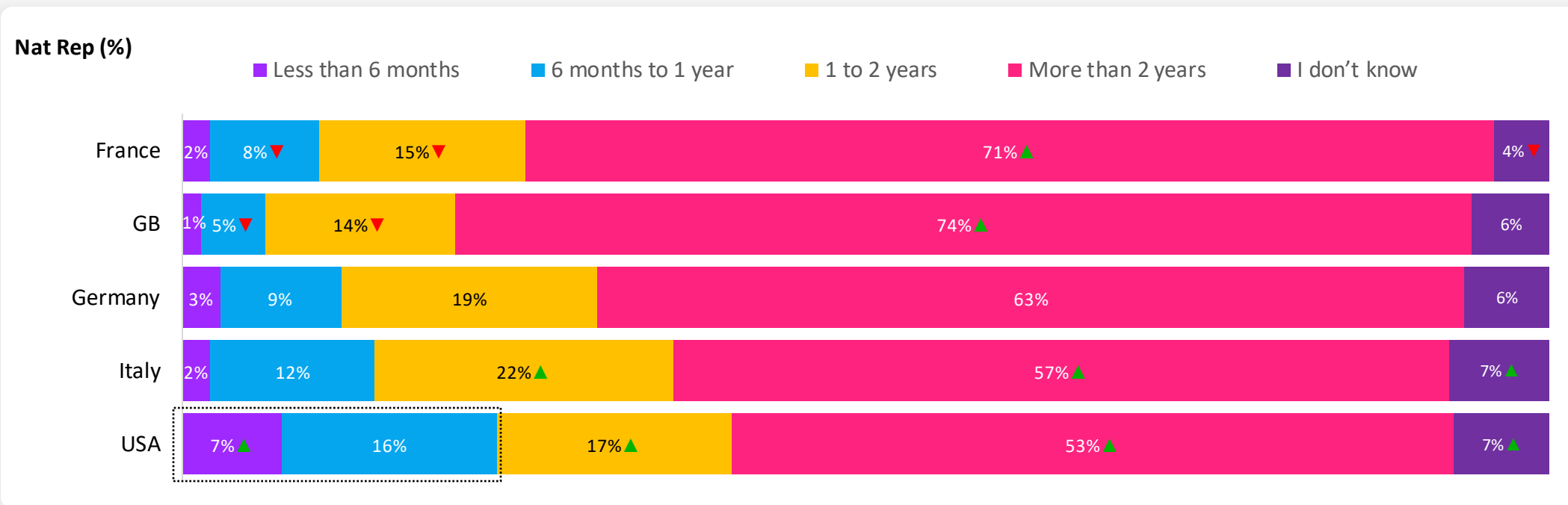


All N=12056 - France N=2940 - GB N=2008 - Germany N=1949 - Italy N=2027 - USA N=3132

▲ ▼ Significant difference at 95% vs Total countries

Americans are more in-market for fast fashion, with nearly a quarter (23%) keeping their clothes for less than 1 year on average.

How long would you say you are keeping, in average, your clothes articles nowadays?

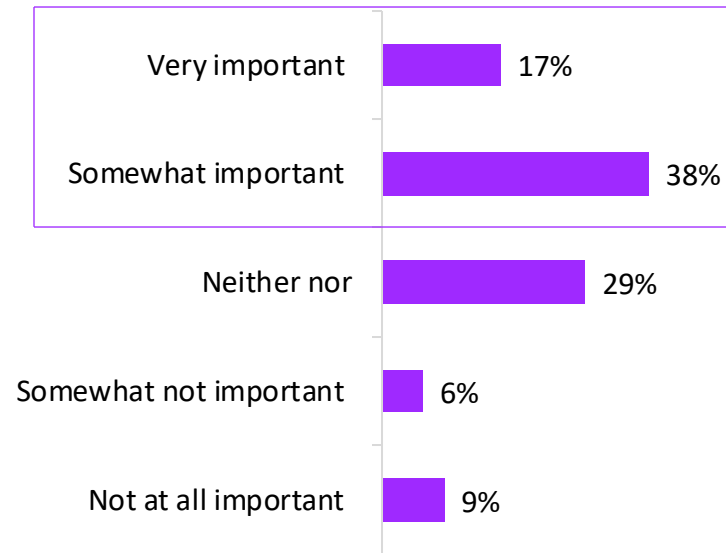


**In a shorter purchase cycle,
is sustainability really
important to consumers?**

Sustainability in fashion is important to more than half of global consumers, and nearly 6 in 10 in Italy, the market with the highest proportion of clothes shoppers.

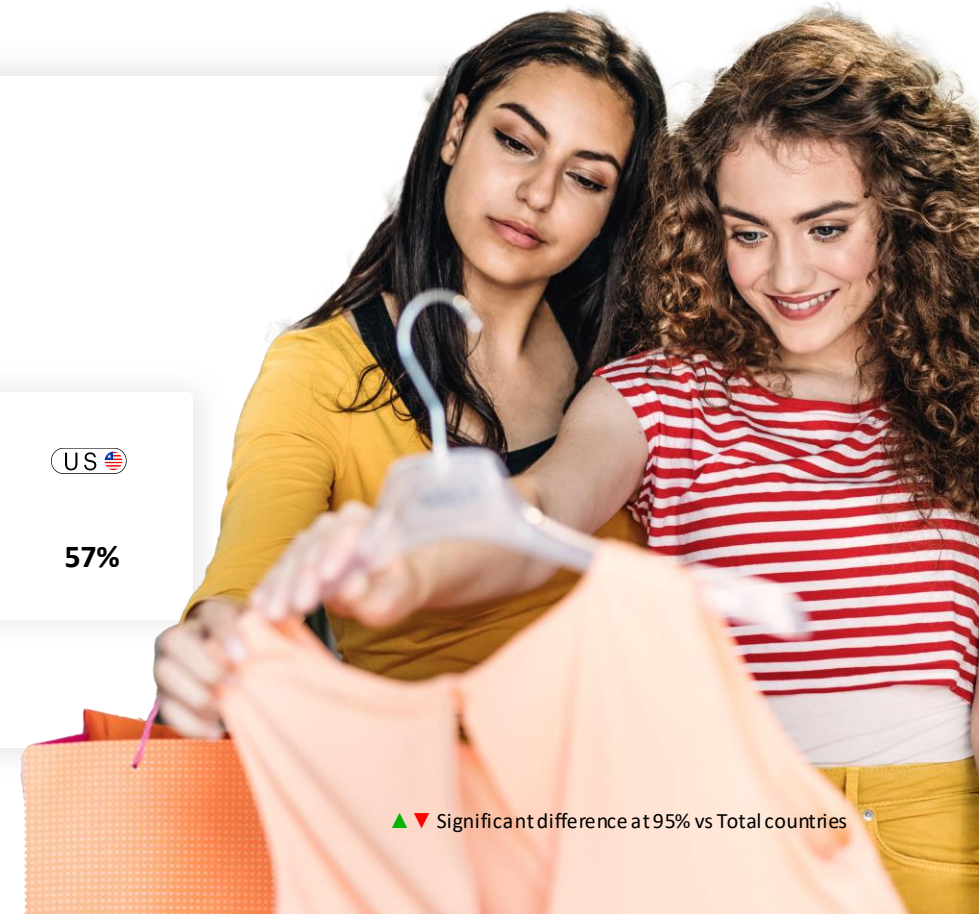
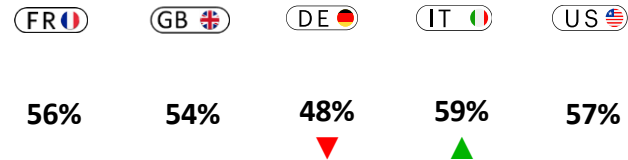
How important is it to you to buy sustainable clothing articles?

% Global consumers



55%

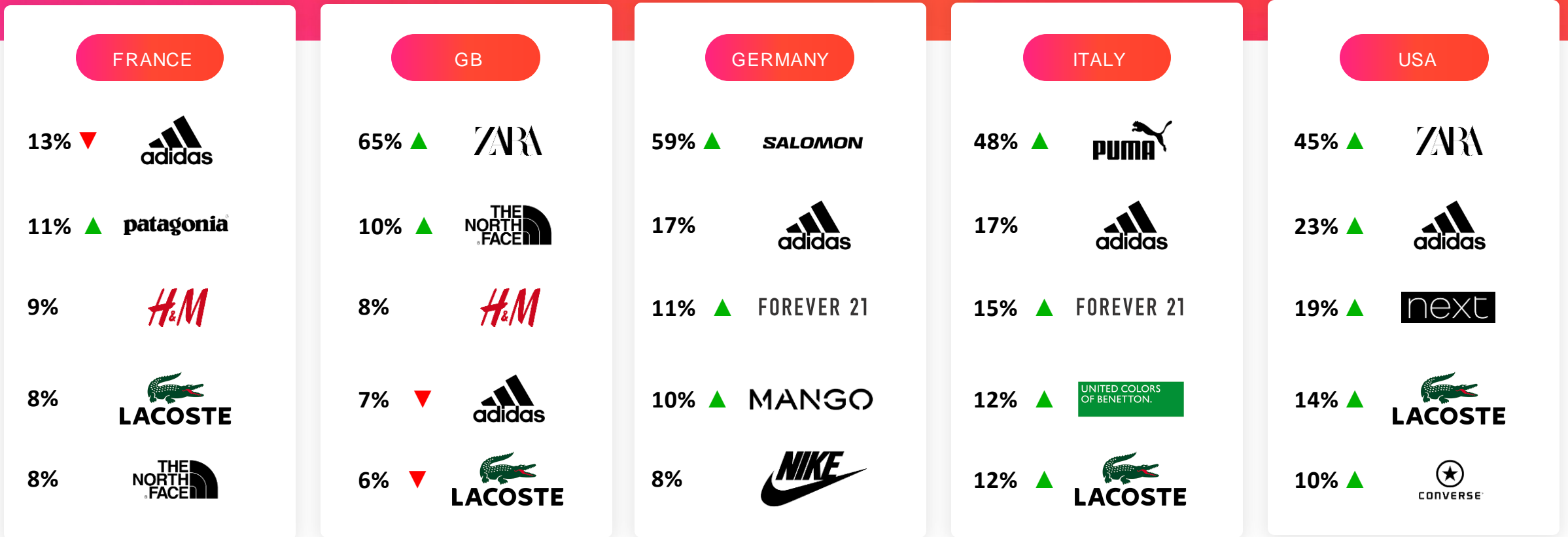
Nat Rep (%)



Top five brands perceived as sustainable

Which of these brands is sustainable according to you?

Nat Rep (%)

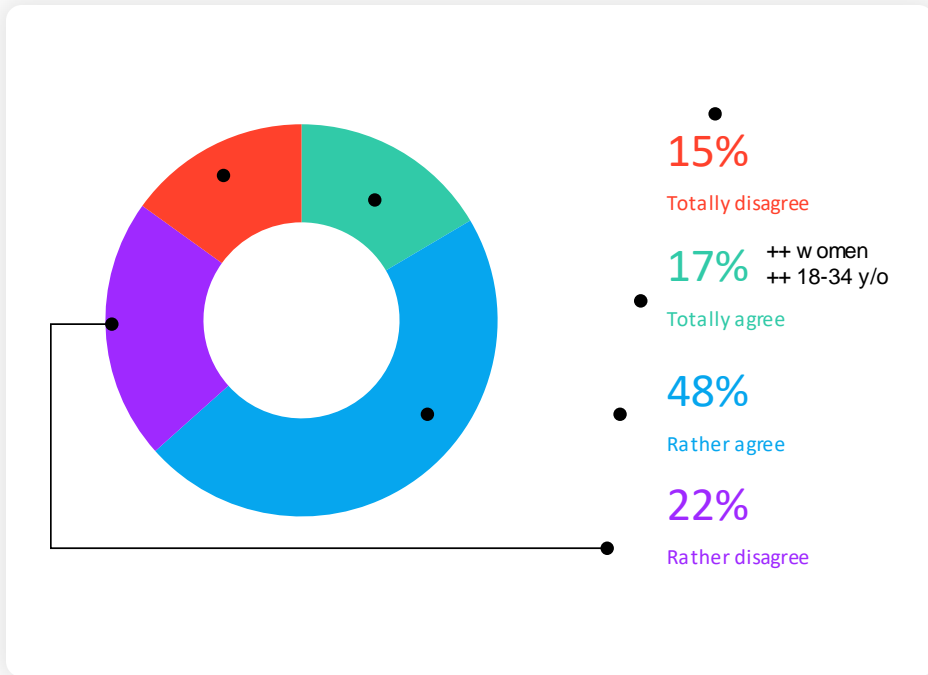


France N=2940 – GB N=2008 – Germany N=1949 – Italy N=2027 – USA N=3132

▲ ▼ Significant difference at 95% vs Total countries

Being perceived as sustainable is important for a brand's reputation among the majorities in all countries studied, with the strongest impact in France.

% Global Consumers who agree or disagree with: "Brands that are *sustainable* have a greater reputation in my eyes"



Nat Rep (%)		France	GB	Germany	Italy	USA
Base N=		2940	2008	1949	2027	3132
NET AGREE		71% ▲	66%	59% ▼	69%	59% ▼
Totally agree		20% ▲	18%	14% ▼	13% ▼	18% ▼
Rather agree		51% ▲	48%	45% ▼	56% ▲	41% ▼

Focus

The Corporate Reputation for Adidas increased significantly in early 2023 among consumers in France who agree that “companies are trying to improve their impact on environment.”

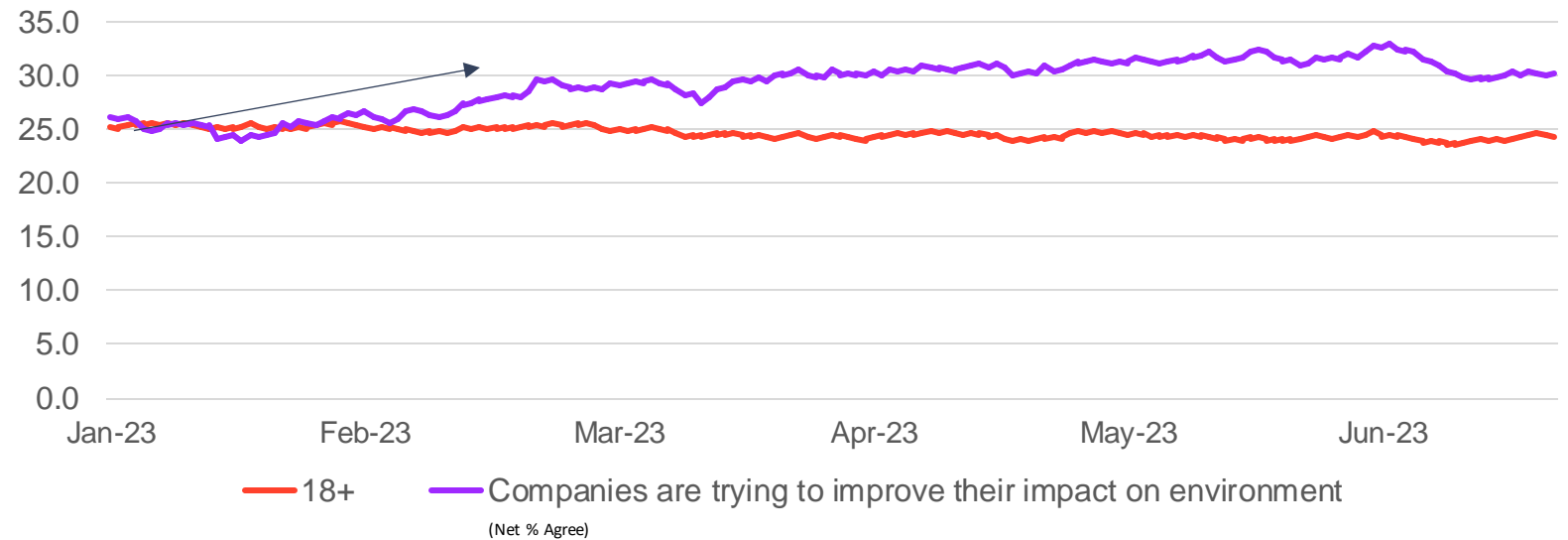
Corporate Reputation

Q ▶ Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?



YouGov BrandIndex

Corporate Reputation



Moving Average = 12 weeks - 18+, n=3100 - Target, n=630

Track your brand now >

Focus

The Corporate Reputation for Zara increases and even more amongst Brits who agree that “companies are trying to improve their impact on environment.”

Corporate Reputation

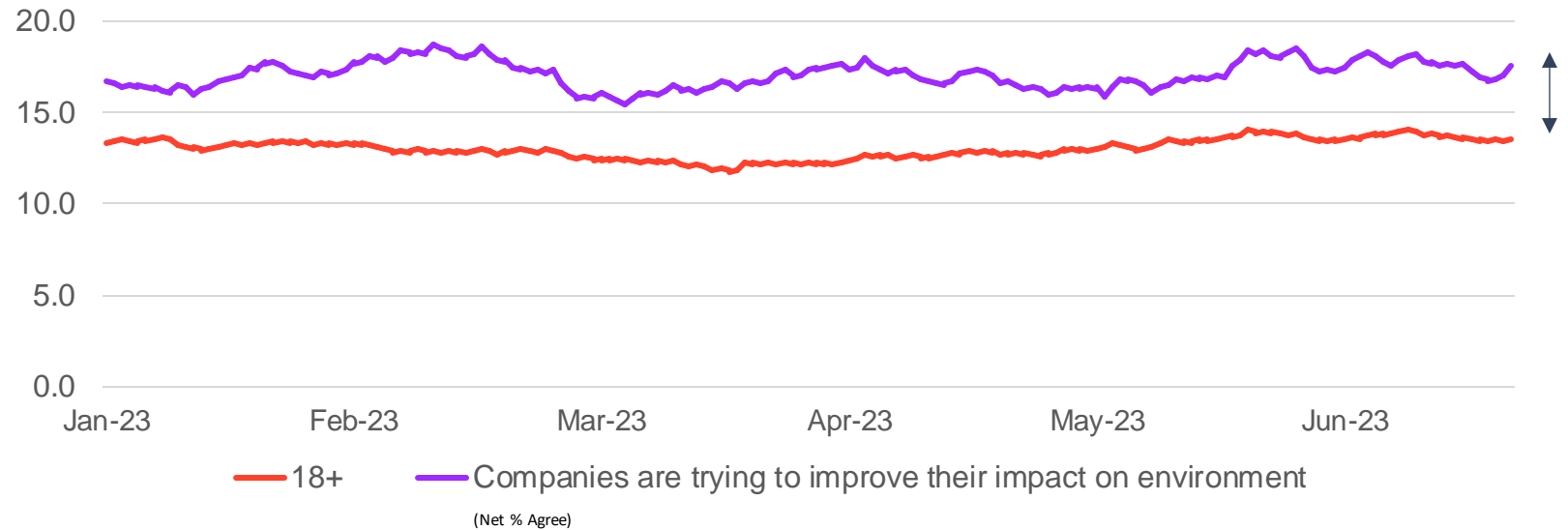
Q ► Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?

ZARA



YouGov BrandIndex

Corporate Reputation



Focus

The Corporate Reputation for Salomon remains somewhat consistent between all Germans 18+ and those who agree that “companies are trying to improve their impact on environment.”

Corporate Reputation

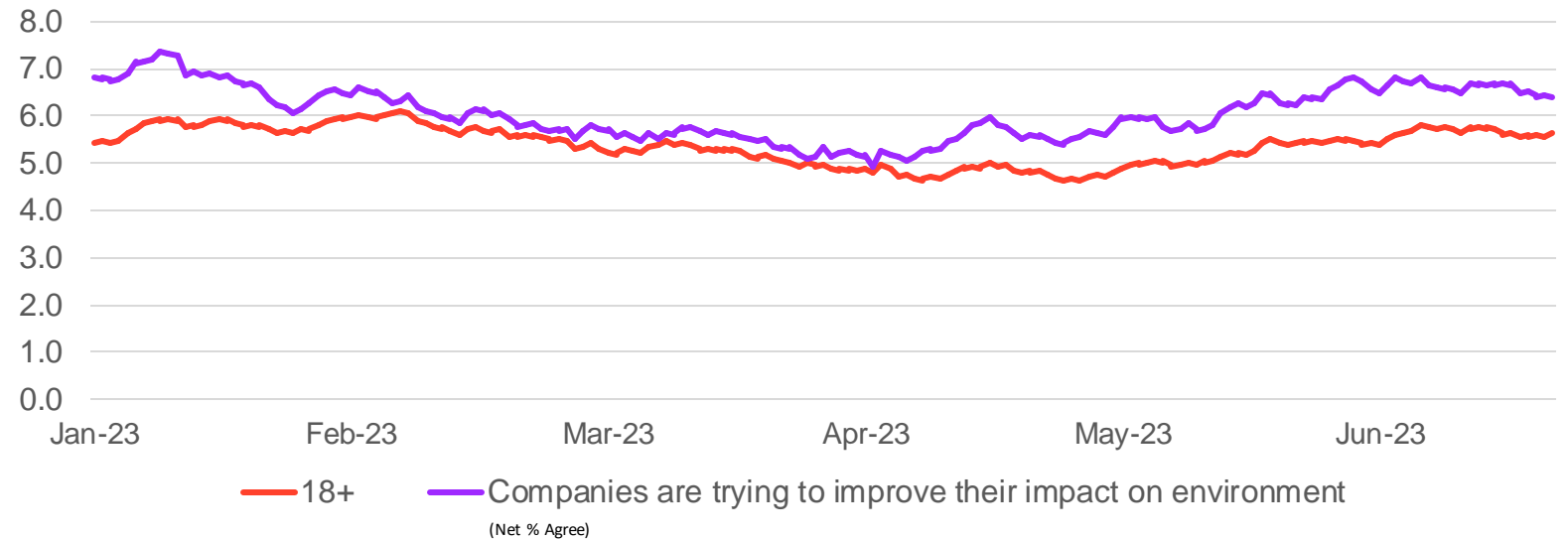
Q ▶ Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?

SALOMON



YouGov BrandIndex

Corporate Reputation



Moving Average = 12 weeks - 18+, n=4400 - Target, n=1470

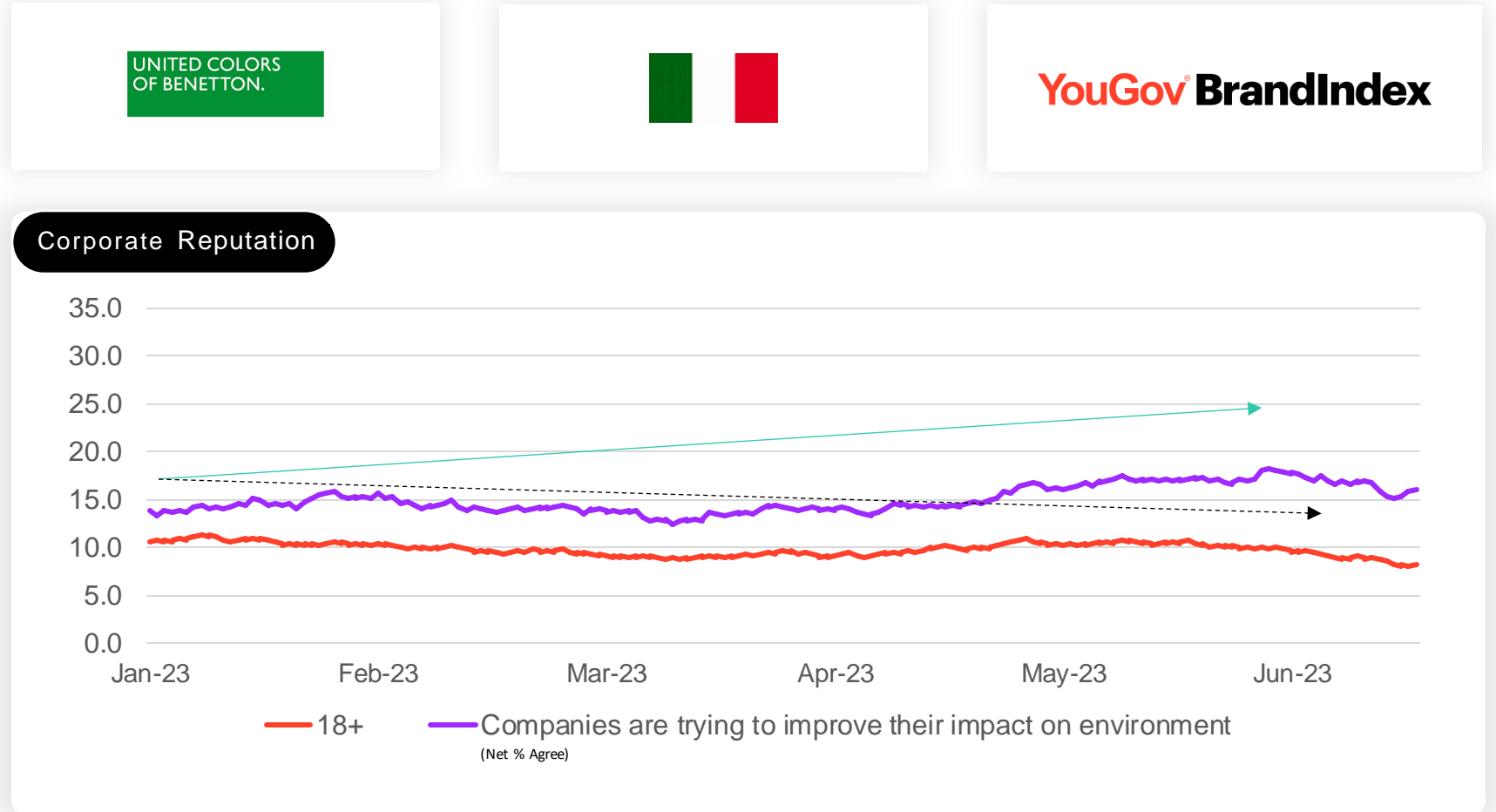
[Explore living data >](#)

Focus

The Corporate Reputation for Benetton improves among Italians who agree that “companies are trying to improve their impact on environment.”

Corporate Reputation

Q ► Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?



Moving Average = 12 weeks - 18+, n=3080 - Target, n=660

[Explore living data >](#)

Focus

The Corporate Reputation for Zara has increased among Americans over 2023, more notably among those who agree that “companies are trying to improve their impact on environment.”

Corporate Reputation

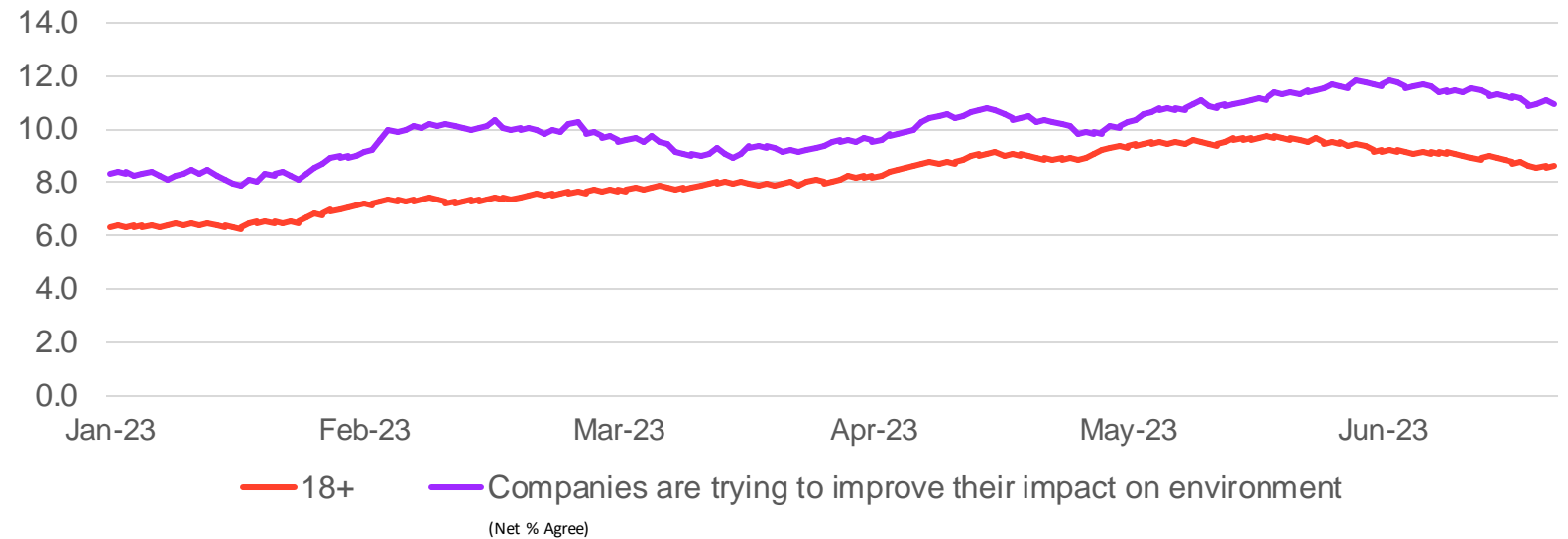
Q ► Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?

ZARA



YouGov BrandIndex

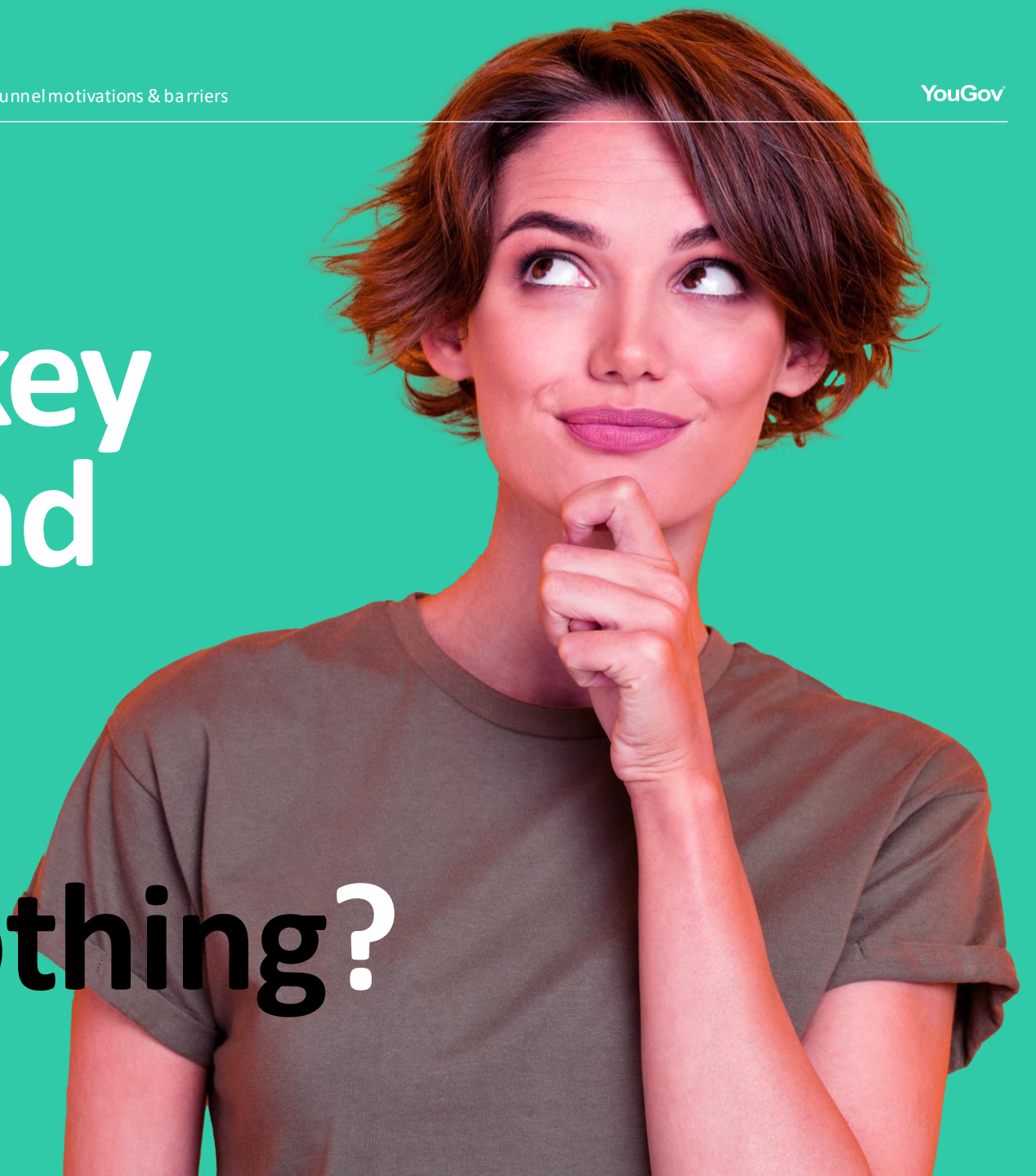
Corporate Reputation



Moving Average = 12 weeks - 18+, n=10700 – Target, n=2290

[Speak to sales >](#)

What are the key motivations and barriers to purchasing sustainable clothing?



Across all markets, price remains the first key purchase criteria, followed by the clothes themselves and quality. In a distant fourth place, the environment is important to nearly 3 in 10 clothing shoppers.

What are all the criteria that are important to you when purchasing clothing articles?

Nat Rep (%)	France	GB	Germany	Italy	USA
The price	1 81% ▲	1 82% ▲	1 72%	2 78%	2 73% ▼
The clothes themselves (NET fabric / fit)	3 66% ▼	2 80% ▲	2 72%	1 81% ▲	1 74%
The quality (NET quality / product longevity)	2 72%	3 73% ▲	3 71%	3 71%	3 69% ▼
The environment (NET manufacturing condition / manufacturing location / Being sustainable)	30% ▲	27%	25% ▼	27%	28%
The brand	27% ▲	22% ▼	19% ▼	21% ▼	28% ▲
Being fashionable	11% ▼	13% ▼	17% ▲	14%	18% ▲
Recommendation (NET Friends / Family / Influencers)	8%	7% ▼	8% ▼	5% ▼	14% ▲
Other	2%	2% ▲	1%	1% ▼	2%
None of the above	2% ▼	3%	3% ▲	1% ▼	3% ▲

Overcome sustainable clothing purchase barriers by communicating:



Price perception

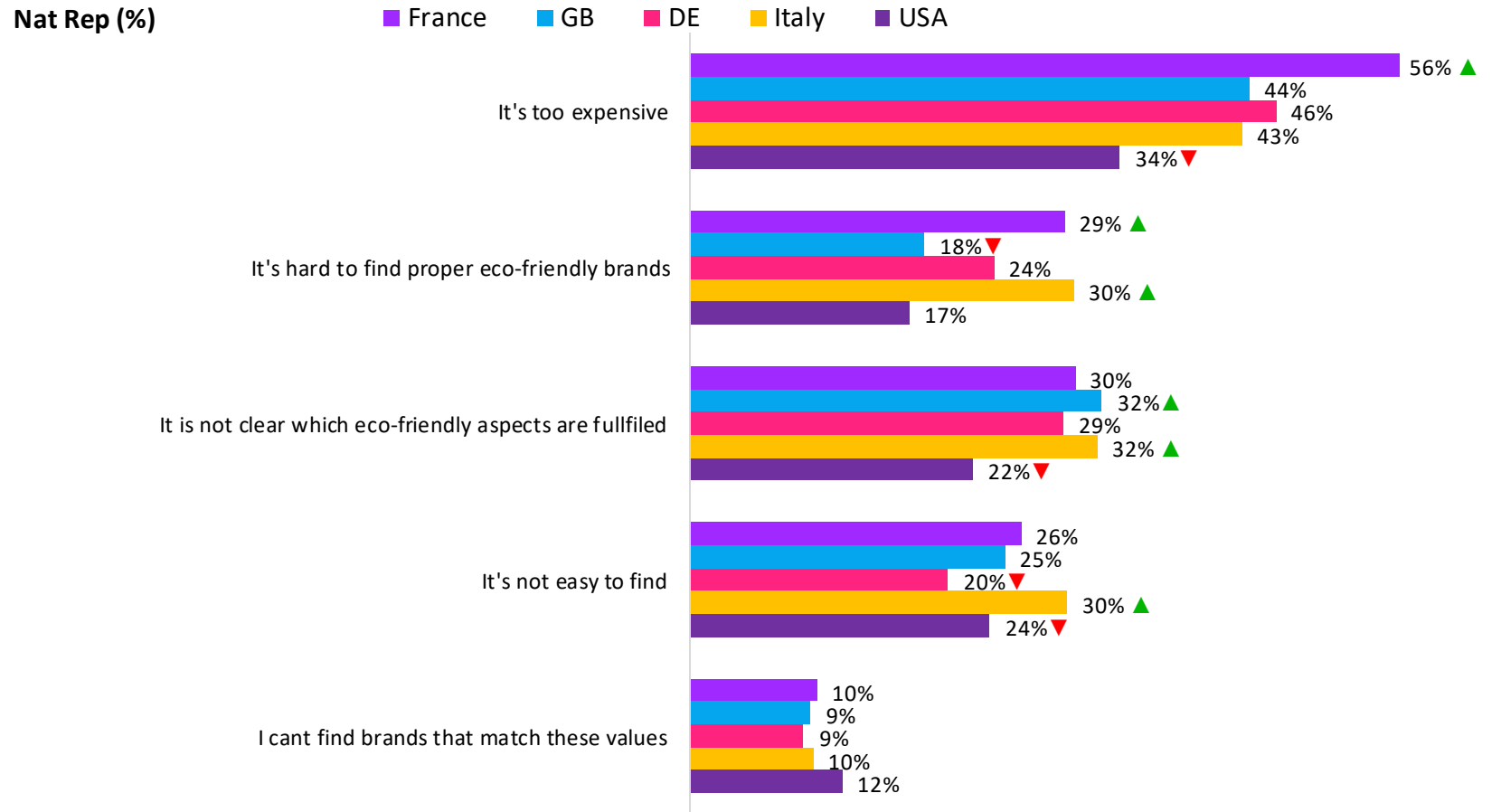


Eco-friendly aspects



Distribution channels

Reasons not to buy sustainable clothes



France N=2940 – GB N=2008 – Germany N=1949 – Italy N=2027 – USA N=3132

▲ ▼ Significant difference at 95% vs Total countries

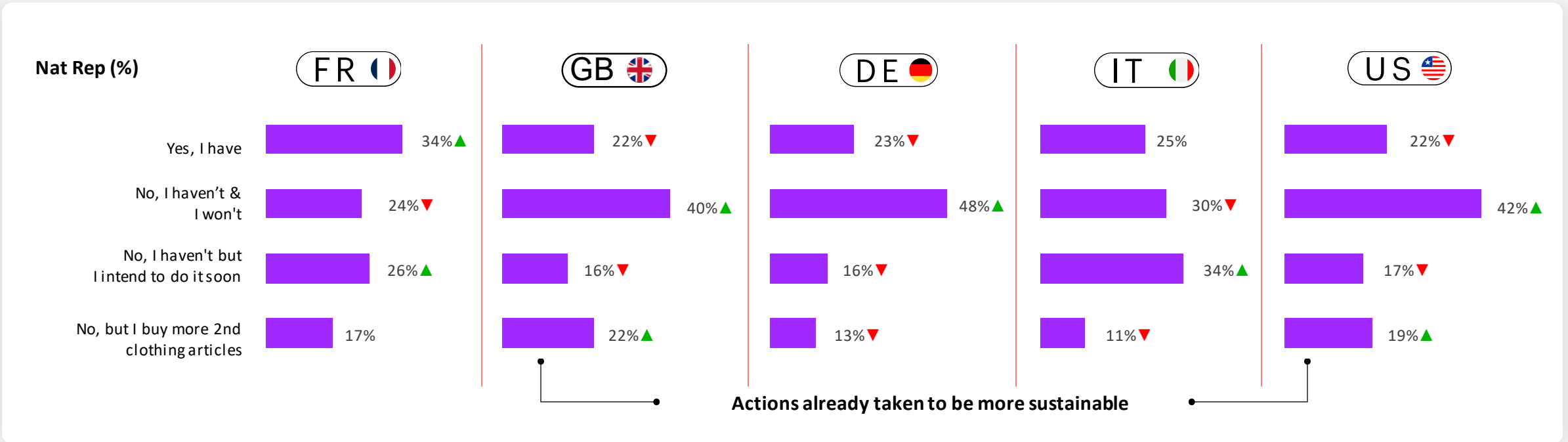
Q: What would stop you from buying sustainable clothing articles?

Individual consumers are willing to group their clothing purchases and wait longer for shipping if it will help



Nearly 1 in 4 consumers have purchased less clothing for sustainable reasons. More Italian and French shoppers are likely to cut back, while 2 in 10 Brits and Americans are doing more secondhand shopping

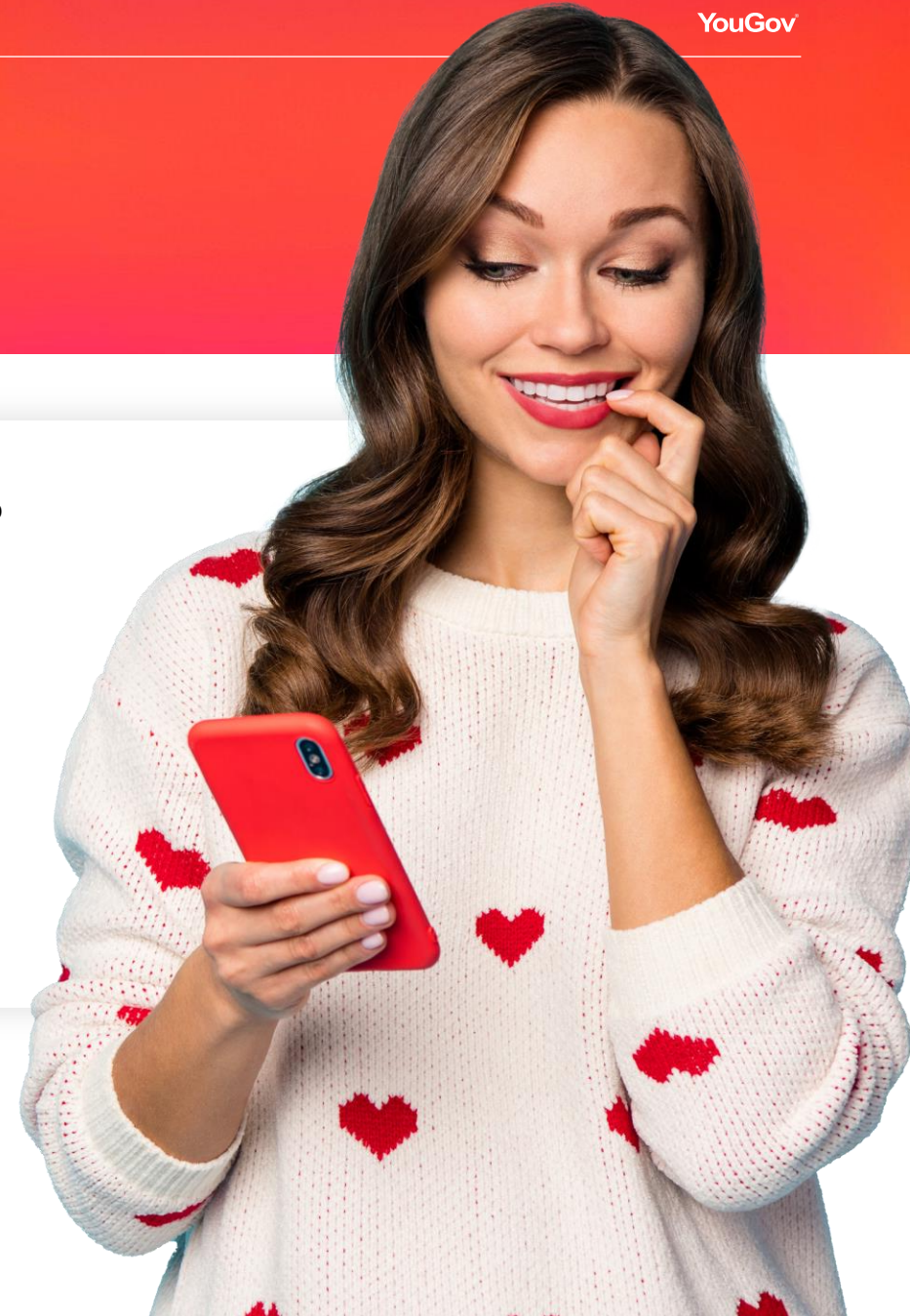
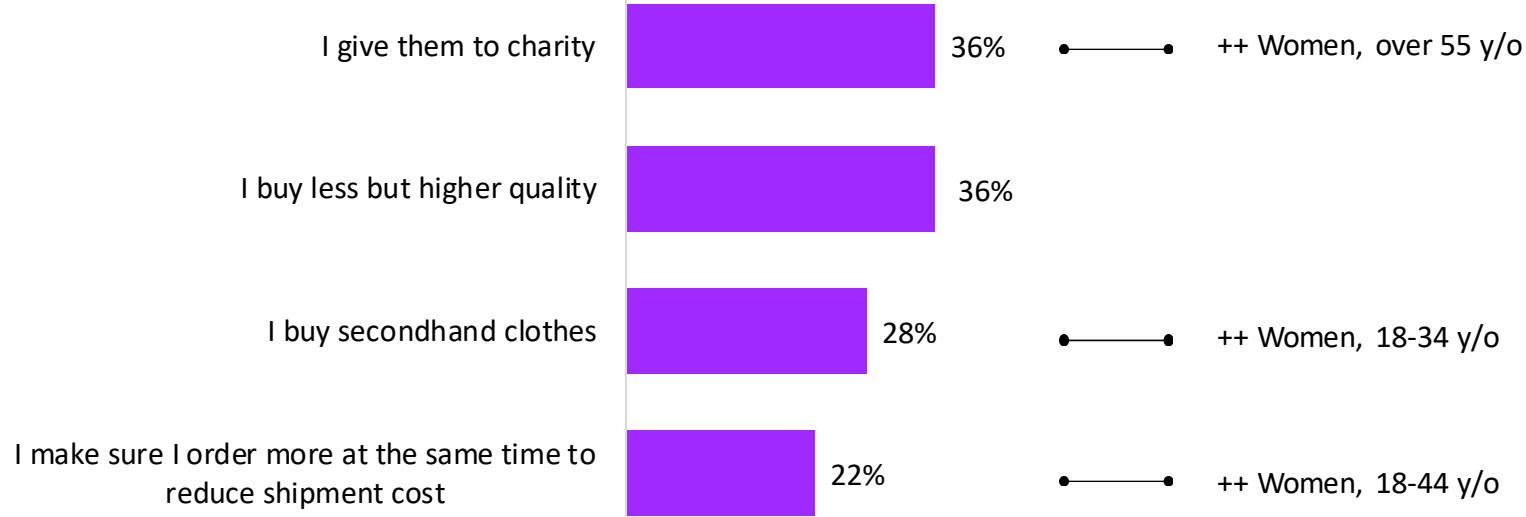
“Have you reduced your clothing purchases for sustainable reasons”



Several actions taken by global consumers to be more sustainable.

What type of actions have you taken to be more sustainable in your purchase of clothing articles?

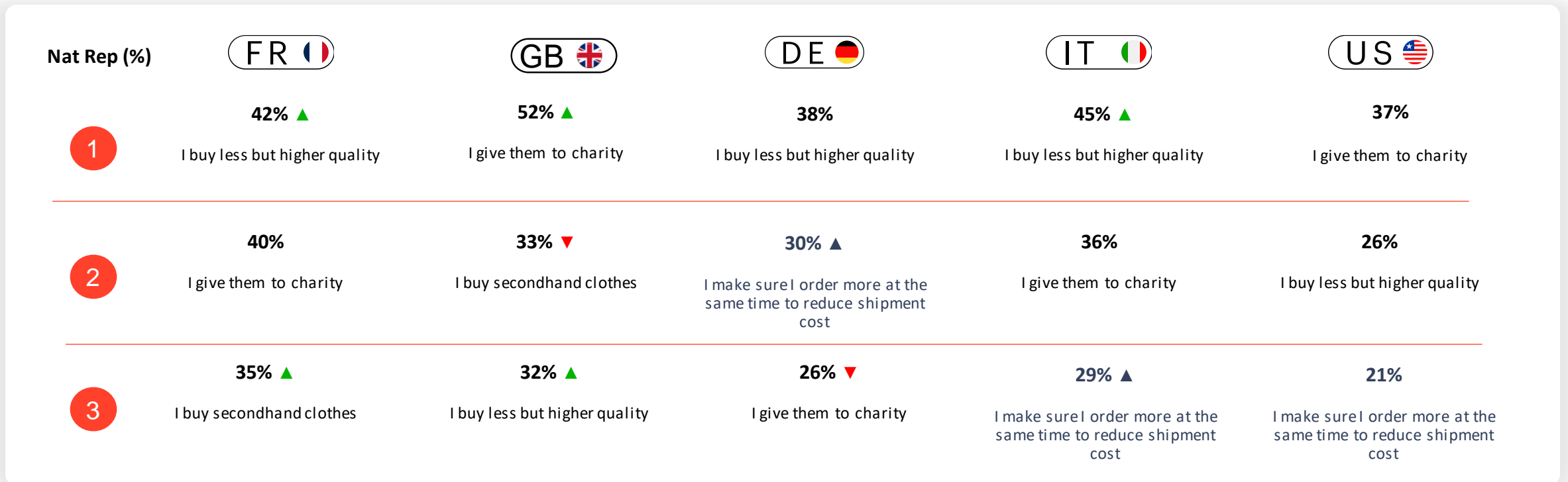
% Global consumers



French, German and Italian consumers take a more proactive approach to sustainability, whereas British and American are more likely to be reactive (e.g. give clothes to charity).

What type of actions have you taken to be more sustainable in your purchase of clothing articles?

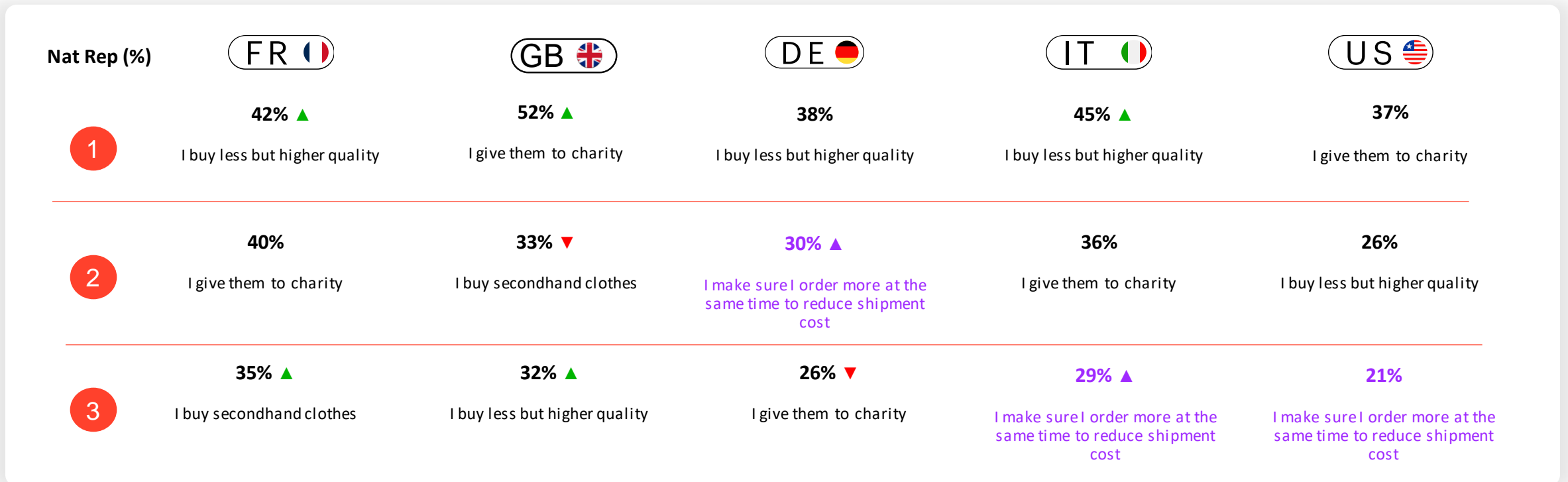
TOP 3 ACTIONS



Clothing shoppers will order more at once to simultaneously reduce shipment costs and be more sustainable.

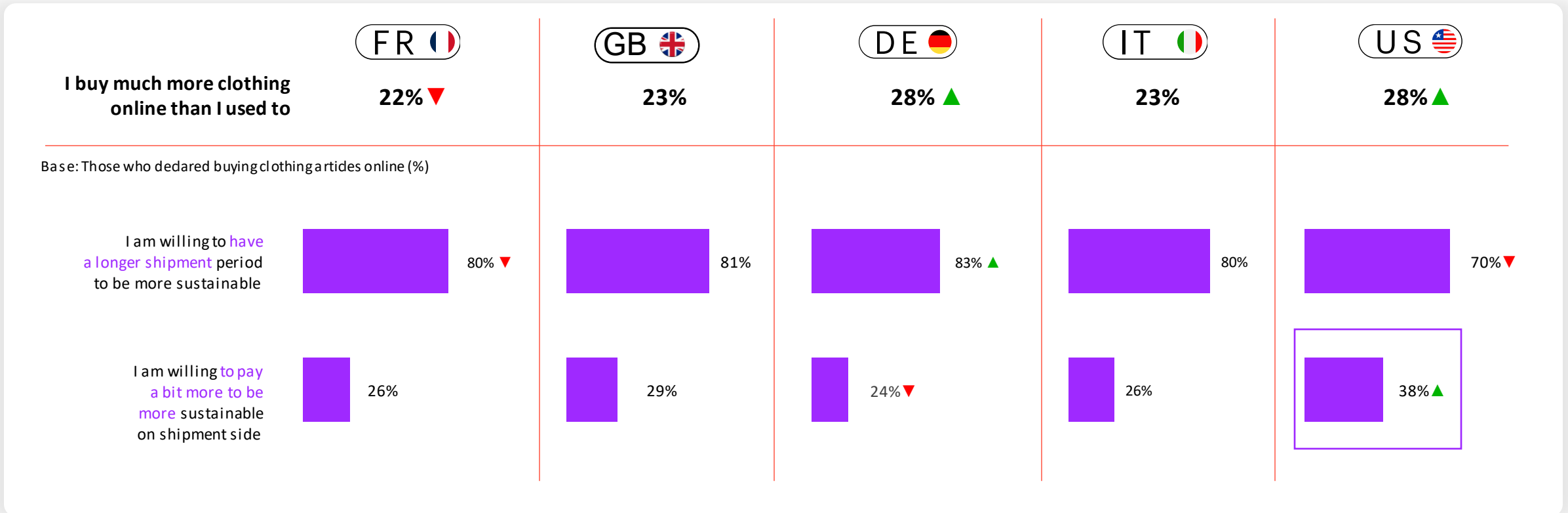
What type of actions have you taken to be more sustainable in your purchase of clothing articles?

TOP 3 ACTIONS



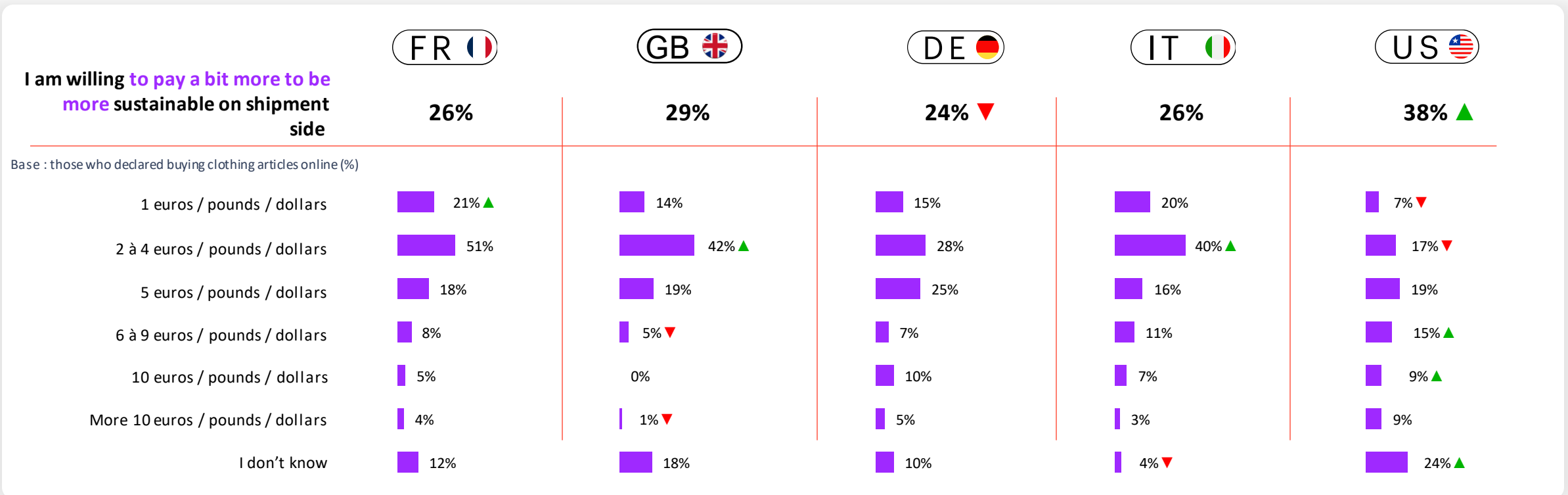
Consumers buying clothing online are willing to wait longer for their shipments to be more sustainable. American are most also willing to pay more for sustainable shipping.

You said that you buy some of your clothing articles online. Do you agree or not with the below sentences ?



Readiness to pay up to 5 €/£/\$ for a more sustainable shipment overall.

You said that you buy some of your clothing articles online. Do you agree or not with the below sentences ?



The younger generation (18-34) is more willing to pay more for a sustainable delivery...

Q: I am willing to pay a bit more to be more sustainable on shipment side



Base: those who declared buying clothing articles online (N=4126)

... but they most likely won't pay more than 5 €/£/\$!

	18-24	25- 34	35-44	45-54	+55
<i>Base</i>	475	781	794	620	1456
I am willing to pay a bit more to be more sustainable on shipment side	40% ▲	37% ▲	31%	24% ▼	22% ▼

How much are they willing to pay?

1 euro	7%	16%	12%	16%	19% ▲
2 to 4 euros	33% 65%	26%	32%	28%	31%
5 euros	25% ▲	21%	17%	16%	17%
6 to 9 euros	15% ▲	13% ▲	11%	9%	3% ▼
10 euros	7%	8%	6%	4%	5%
More than 10 euros	4%	7%	7%	5%	2% ▼
I don't know	9% ▼	9% ▼	15%	22% ▲	24% ▲

You said that you buy some of your clothing articles online. Do you agree or not with the below sentences ?

▲ ▼ Significant difference at 95% vs Total countries

What do consumers who care about the environment expect?



Sustainability Segmentation at YouGov

Nat Rep %

US 

51%

Are either very engaged or care for the environment*

estimated market size = 129.8 million adults

GB 

63%

Are either very engaged or care for the environment*

estimated market size = 33.2 million adults



Planet protectors

Engaged environmentalists, happy to pay more for products that are good for the environment, interested in issues related to sustainability



On the green fence

Unconcerned and disengaged, uninterested in sustainability issues



Price point green

Caring about the environment and making an effort to protect it, but the key factor that affects their purchase decisions is a price



Green rejectors

Negative views on environmental sustainability, skeptical about climate change, prioritizing economic and political issues over the environment



Green when keen

Recognize that climate change is a problem, agree we should do more to protect the environment, but sustainability is not entrenched in their lifestyle

*Planet protectors + Price point green + Green when keen



51%

Are either very engaged or care for the environment*

These Americans women based in the Midwest who have a lower income than the average US adult.

They are more interested TV and movies (potential communication channels for brands) and have a stronger affinity towards brands that are environmentally friendly.

Market Estimate ~
129.8 million (18+)

* Among Planet protectors + Price point green + Green when keen

Gender

Female	59%▲
Male	41%

General Interest

Politics	70%
Television	63%▲
Music	54%
Movies	54%▲
Books	48%

Religion

Midwest	27%▲
Northeast	22%
South	33%
West	18%▼

Income

High income	6%
Middle income	35%
Low income	49%▲

Parents kids >18 y/o

Yes	45%▲
-----	------

Ethnicity

White	66%
Hispanic	15%
Black	13%

Psychographics

▲ "I think all fashion brands should consider addressing social issues."

▲ "I think green energy is the future"

"I try to buy only from companies who are socially and environmentally responsible" ▲

"When I buy clothes, I tend to choose comfort over style"

"Online shopping make my life easier"



51%

Are either very engaged or care for the environment*

Pushing communication through sponsoring of TV program or on streaming services would be beneficial as this audience is more likely than the average to regularly watch major TV networks, and 43% use streaming services like Netflix and Amazon Prime.

Type of sponsorship noticed

Product placement	30%
Sponsoring of TV program	27%
Sponsor of an event	21% ▼
Sponsor of UGC	19%
Sponsor of a social media post	16%
Sponsor of a sport team	13%

Attitudes towards Retail

- 87% "I like owning good quality products"
- 71% "I prefer to shop a local businesses"
- 69% "I like to know where my products were manufactured"

TV Networks watched regularly

CBC	46% ▲
NBC	40% ▲
ABC	39% ▲
FOX	27%
MSNBC	20% ▲

Methods used to watch movies

Via subscriptions streaming services	43% ▲	47% using Netflix regularly
Free TV channels	36%	
Free streaming/downloading sites	26%	34% using Amazon Prime video regularly
At the cinema/ theatre	25%	
On DVD	16%	

* % Among Planet protectors + Price point green + Green when keen



US 

51%

Are either very engaged or care for the environment*



* % Among Planet protectors + Price point green + Green when keen

Attitudes towards Advertising

▲ "I like brands that are willing to get involved with moral issues."

▲ "I like when companies have a moral message."

Member of social network



78%



37% ▼



34%



41%



14% ▼





51%

Are either very engaged
or care for the environment*

These are the fashion brands
they say they are most likely to
consider buying from the next
time they are in-market to buy
clothing.

Top 10 considered fashion brands – Sustainable Americans

1	Skechers	40%
2	Levi's	39%
3	Nike	30%
4	Lee	28% ▲
5	New Balance	27%
6	Adidas	24%
7	Wrangler	24%
8	Converse	17%
9	Under Armour	17%
10	Dr. Scholl's	16%

* % Among Planet protectors + Price point green +
Green when keen

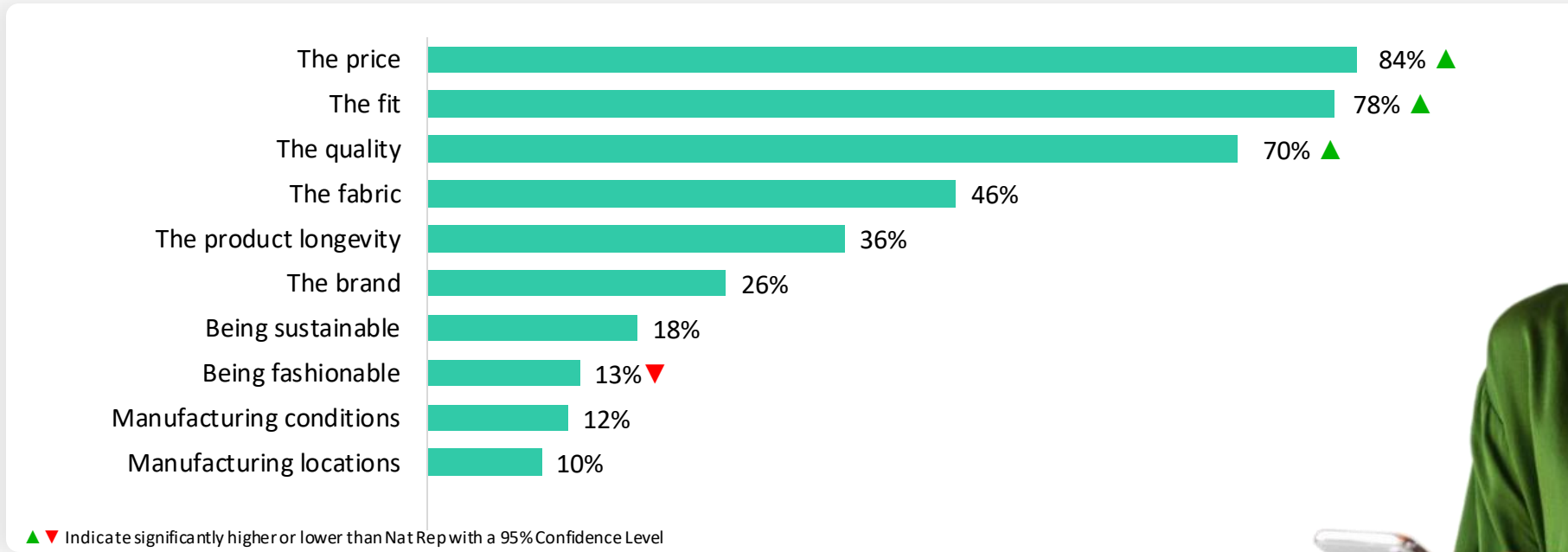
Base: Planet protectors + Price point green + Green when keen



**Even among the
eco-conscious, price is more
compelling than
sustainability**

What matters when buying clothes?

Sustainably-focused Americans are even more conscious to the price, fit and quality than the average American.

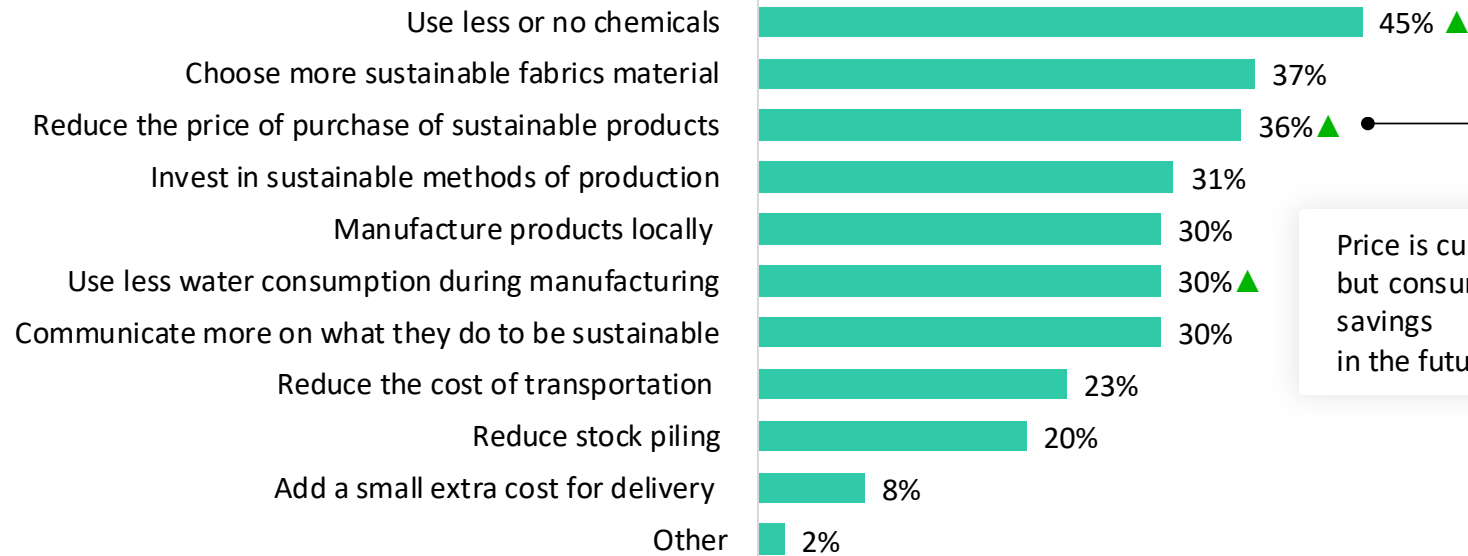


Q. What are all the criteria that are important to you when purchasing clothing articles?

Base -> (Planet protectors + Price point green + Green when keen) - USA N=345

What should clothing brands do to be more sustainable?

Base: 51% are either very engaged or care for the environment

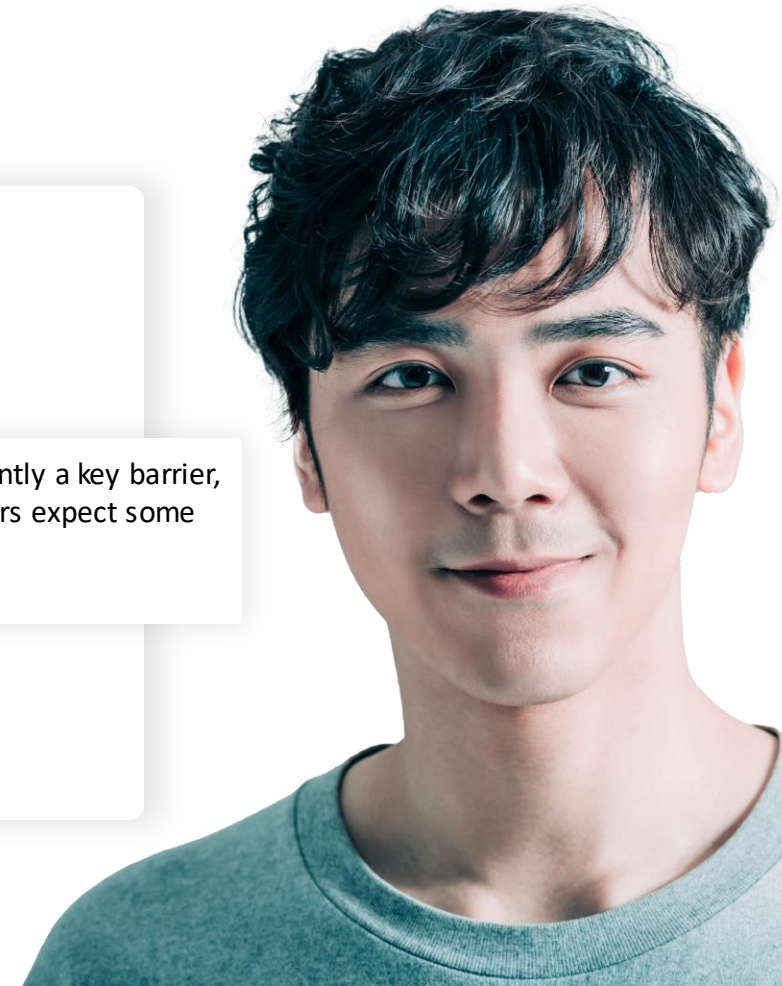


Price is currently a key barrier, but consumers expect some savings in the future

▲ ▼ Indicate significantly higher or lower than Nat Rep with a 95% Confidence Level

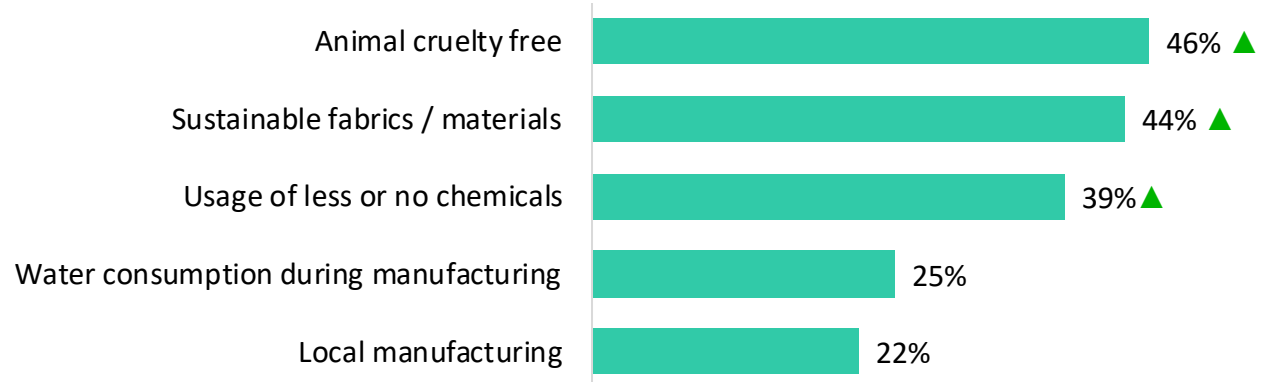
Which actions should clothes brands take to be more sustainable?

Base: (Planet protectors + Price point green + Green when keen) - USA N=345



Which eco-friendly actions matter when buying clothes?

Base: 51% are either very engaged or care for the environment



▲ ▼ Indicate significantly higher or lower than Nat Rep with a 95% Confidence Level



Q. Which eco-friendly elements are important when you buy clothing articles?

Base: (Planet protectors + Price point green + Green when keen) - USA N=345



**Communicate how your use of
fewer chemicals impacts the
price**



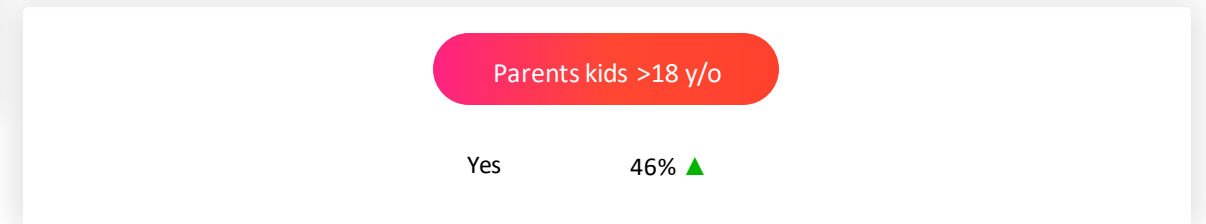
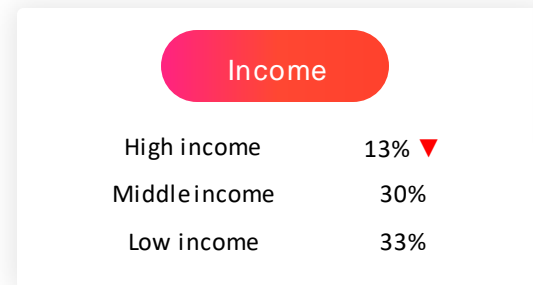
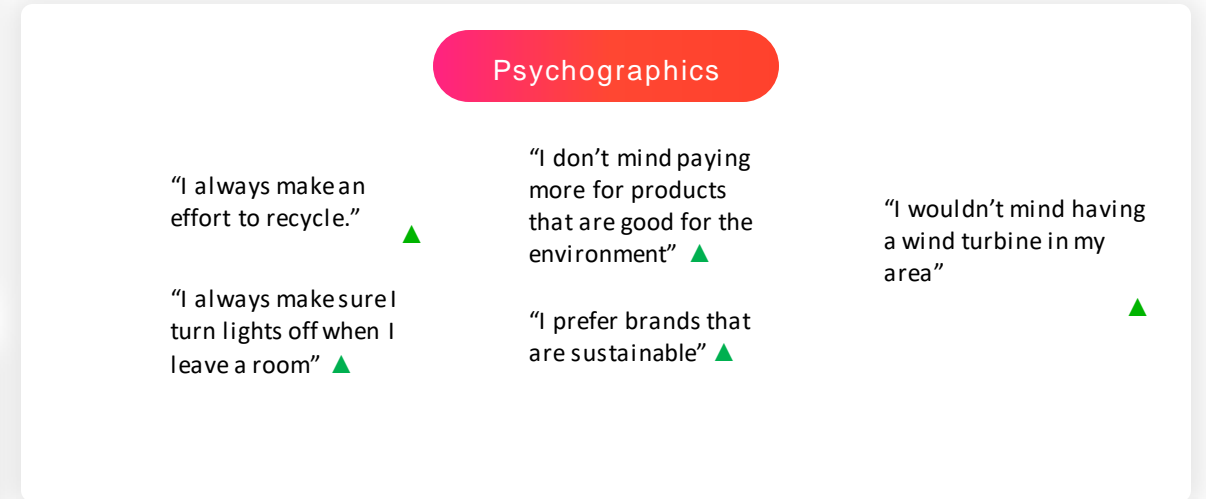
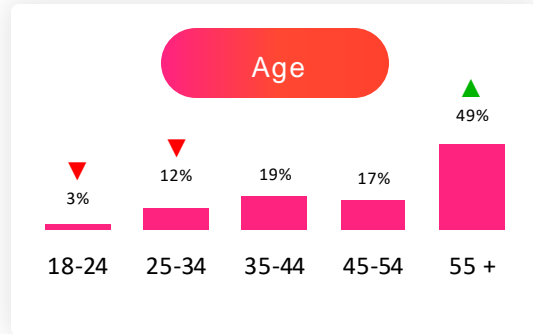
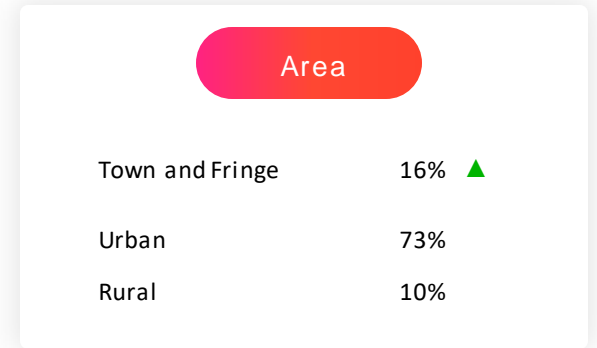
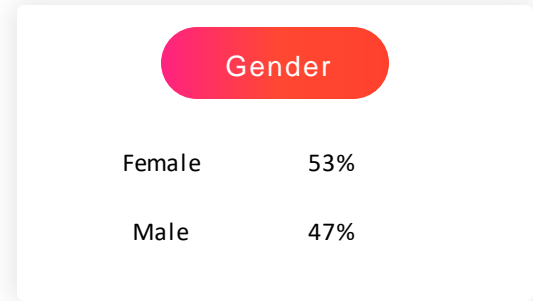
63%

Are either very engaged or care for the environment*

An audience that is older, living in town and fringe, with less high income than total population. Being interested in news (national or international), they are clearly more engaged towards brands that are environmentally friendly.

Market Estimate ~
33.2 million

* % Amongst Planet protectors + Price point green + Green when keen



GB **63%**Are either very engaged
or care for the environment*Sponsoring of TV program or even
event would be a good way to
address these consumers,
especially as they are more
attentive to the sustainable
dimension during events.**Type of sponsorship noticed**

Sponsoring of TV program	38%
Sponsor of an event	31%
Product placement	22% ▼
Sponsor of a sport team	22%
Sponsor of user generated content	15% ▼
Sponsor of a social media post	10%

TV Networks watched regularly

BBC One	57%
ITV	41%
Channel 4	40%
BBC Two	33%
Channel 5	23%

Attitudes towards Retail

"I make an effort to buy fair trade products" ▲

"I think all fashion brands should consider addressing social issues" ▲

"If I have a choice, I buy products made in my home country" ▲

"I think it's important that loyalty programmes and promotions help
People live more sustainably and support the environment" ▲* % Amongst Planet protectors + Price point green +
Green when keen

GB 

63%

Are either very engaged or care for the environment*



* % Amongst Planet protectors + Price point green + Green when keen

Attitudes towards Advertising

"I think brands should consider environmental sustainability when putting on events" ▲

Member of Social Network



69%



38%



36%



36%



GB **63%**

Are either very engaged
or care for the environment*

These are the fashion brands
they say they are most likely to
consider buying from the next
time they are in-market to buy
clothing.

Top 10 considered fashion brands – Sustainable Brits

1	Marks & Spencer	39%
2	Primark	29%
3	Matalan	27%
4	Next	21%
5	F&F Clothing	18%
6	TK Maxx	18%
7	White Stuff	17%
8	George	17%
9	TU Clothing	17%
10	New Look	16%

* % Amongst Planet protectors + Price point green +
Green when keen

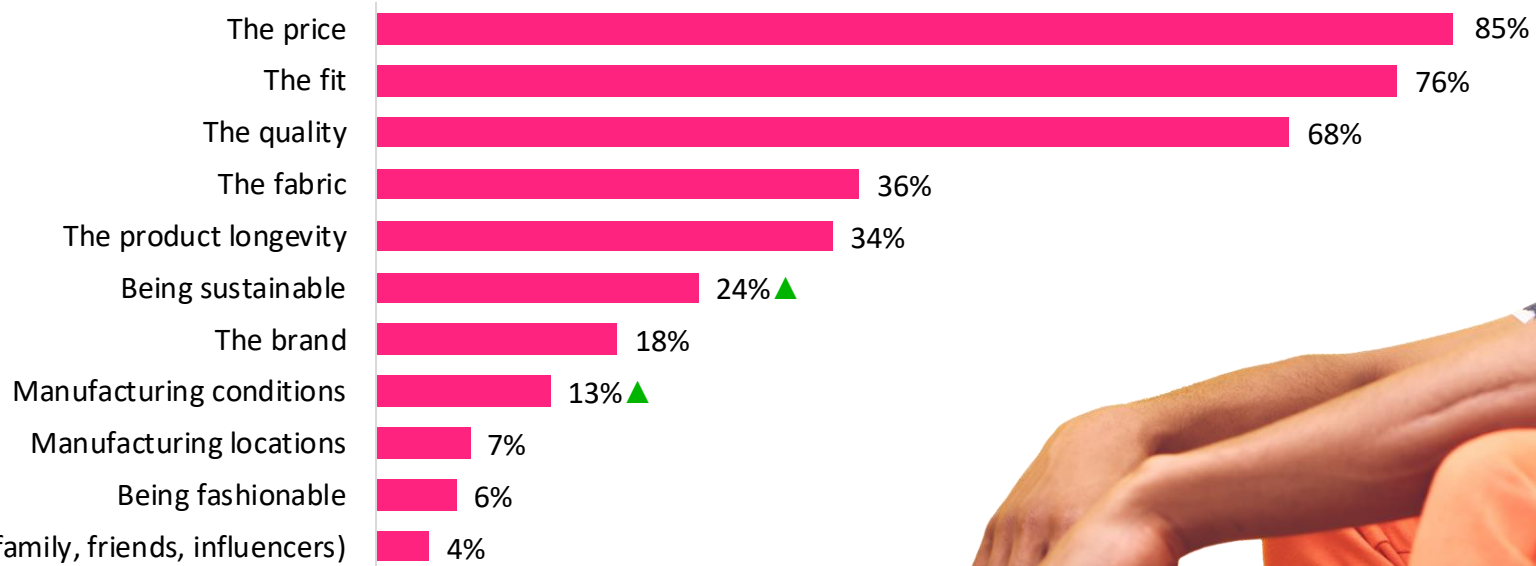
Base: Planet protectors + Price point green + Green when keen



Price and core essence of clothes are more important than being sustainable

What matters when buying clothes?

While this audience emphasized sustainability and manufacturing conditions more than average Brit, price remains much more important.



▲ ▼ Indicate significantly higher or lower than Nat Rep with a 95% Confidence Level



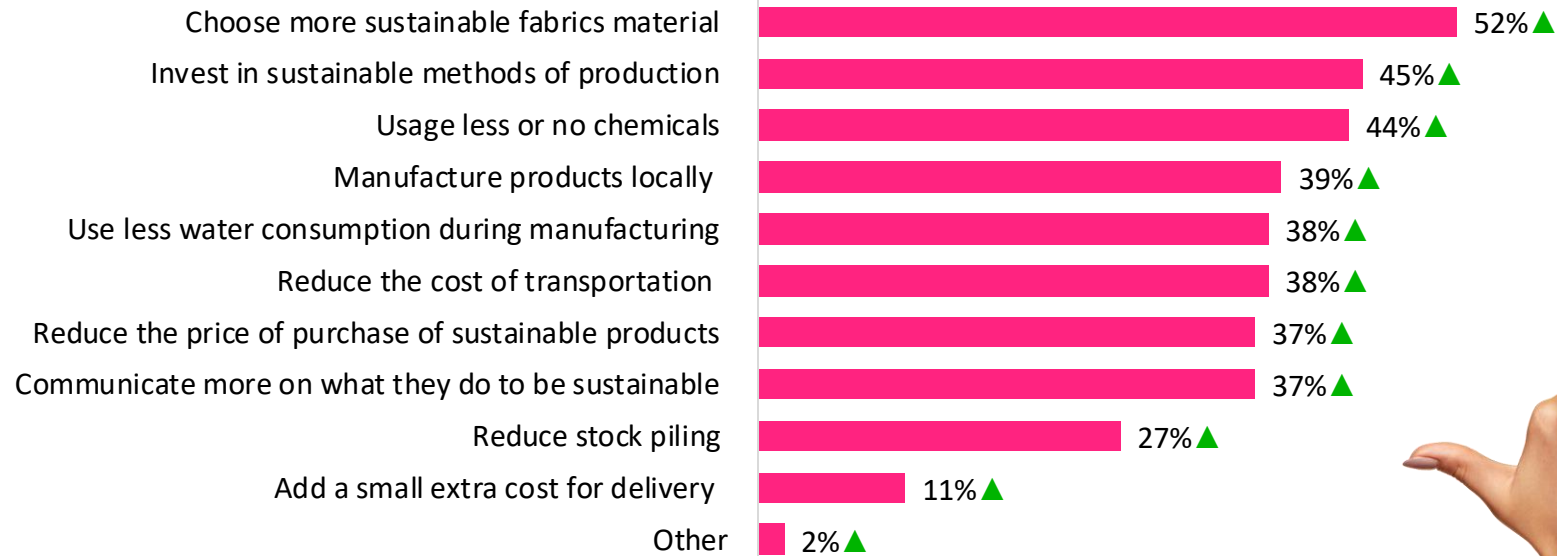
Q. What are all the criteria that are important to you when purchasing clothing articles?

Base -> (Planet protectors + Price point green + Green when keen) - GB N=367



Which actions should clothes brands take to be more sustainable?

Base: 63% are either very engaged or care for the environment



▲ ▼ Indicate significantly higher or lower than Nat Rep with a 95% Confidence Level

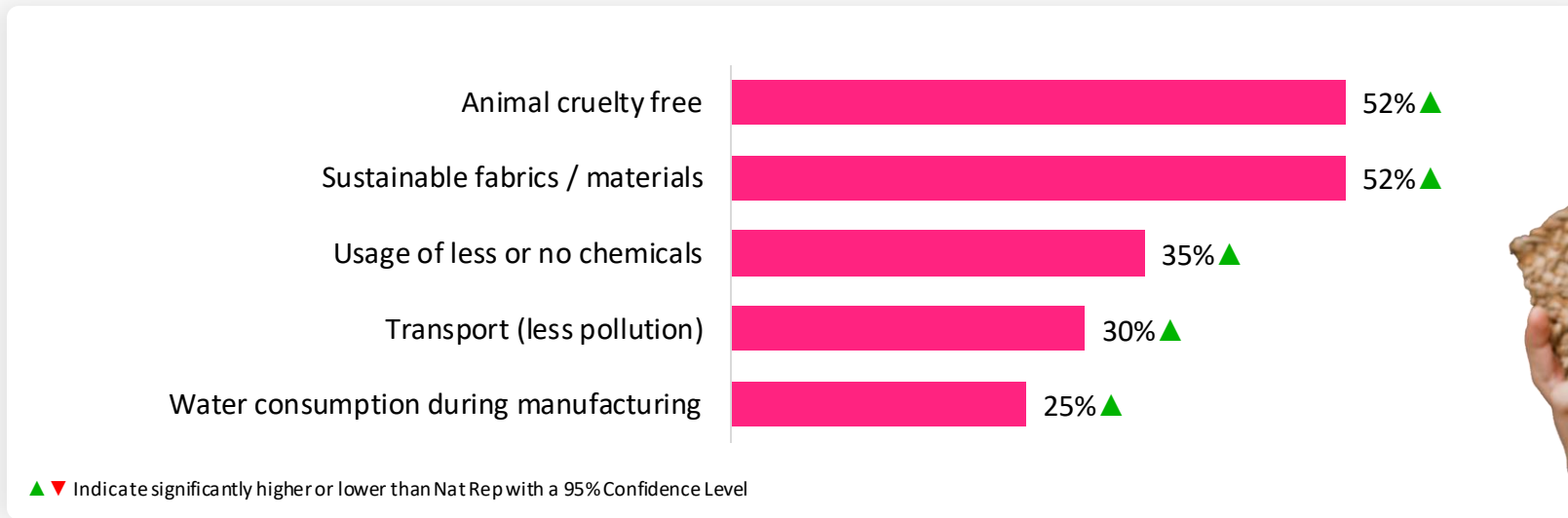


Which actions should clothes brands take to be more sustainable?

Base: (Planet protectors + Price point green + Green when keen) - GB N~367

TOP 5 eco-friendly elements important when buying clothing articles?

Base: 63% are either very engaged or care for the environment



Q. Which eco-friendly elements are important when you buy clothing articles?

Base: (Planet protectors + Price point green + Green when keen) - GB N=367

Base: Planet protectors + Price point green + Green when keen



**Communicate about your
policies on animal welfare and
your fabrics**

Key Findings

Sustainable Fashion - Status

In a market where consumers keep purchasing clothes, and even tend to keep them for shorter period of time (less than 1 year), how can fashion brand push for more sustainable fashion? Is that even an expectation from consumers?

Market status

- Consumers are very involved in the fashion market: **7 out of 10 have bought more than one item of clothing in the last 12 months.**
- Their **relationship to clothes is changing**, particularly in France and Italy, where consumers will keep their clothes for longer, whereas in the **USA, fast fashion** is still firmly entrenched compared to other countries.
- Overall, shoppers are **sensitive** to the **concept of sustainability** (important for more than half), which influences their perception of brands, especially in France.
- Individual consumers are **willing to group their clothing purchases or wait for longer delivery times in order to be more sustainable.** Younger consumers are even more willing to pay more for sustainable delivery (between 1 and 5 euros).

Motivations & barriers

- For both the general public and those engaged towards the environment, and in an inflationary context, price and the core essence of clothes (fit & quality) are the key purchase criteria in this sector. **Sustainability is a secondary consideration.**
- However, fashion brands should consider some elements which are still important to consumers when purchasing clothes.
- **To ensure greater sustainability in the future, consumers expect brands to take action around animal welfare, the materials/fabrics used and fewer/no chemicals.**

Thank you

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