

Sustainability in fashion

Part 1: **Market Status**

France, GB, Italy, Germany, USA, Spain



- 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)

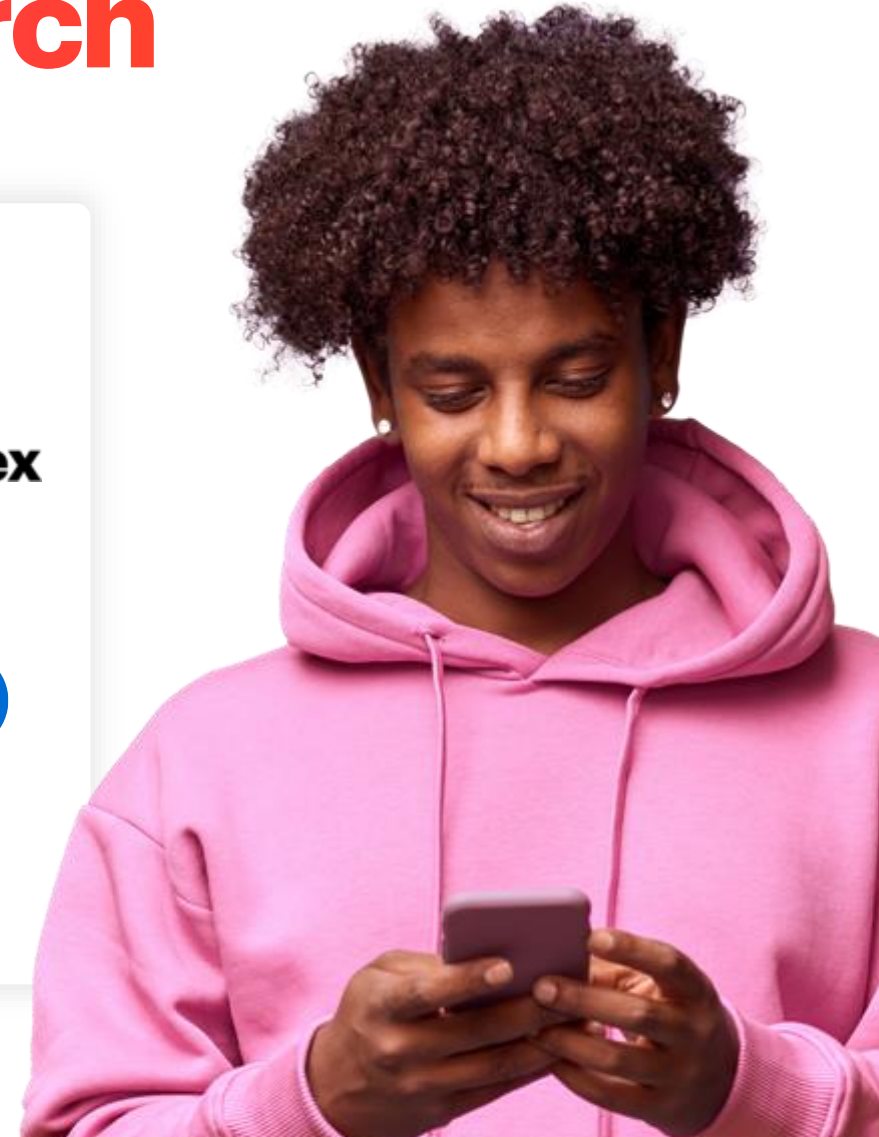
- USA N=3132
- GB N=2008
- France N=2940
- Germany N=1949
- Italy N=2027
- Spain N=1063



Fieldwork: March/July 2023

YouGov Surveys
YouGov BrandIndex
YouGov Profiles

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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?



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

Nat Rep (%)



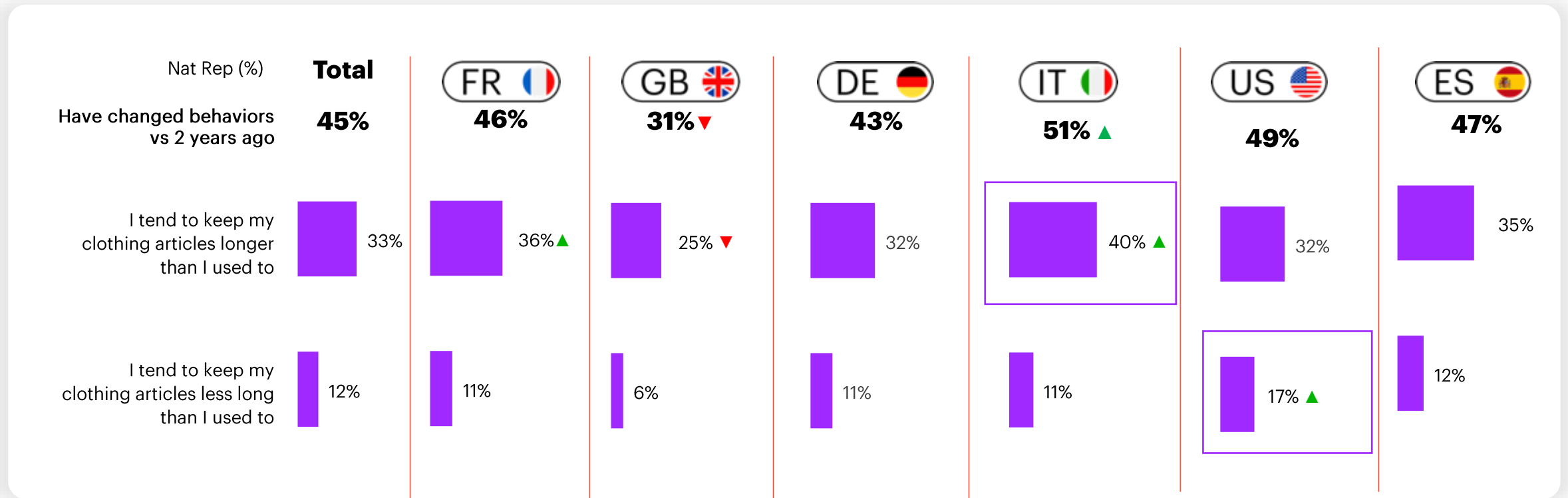
**Clothing items is the most purchased category by all countries.
Spain and Italy have a very similar profile with high levels of purchase across the different categories.**

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

Nat Rep (%)	France	GB	Germany	Italy	USA	Spain
More than one category	73%	72%	69% ▼	79% ▲	67% ▼	82% ▲
Clothes (e.g. trousers, jeans, tops..)	71%	77% ▲	73%	79% ▲	58% ▼	80% ▲
Shoes / Trainers	63%	60%	59% ▼	71% ▲	59% ▼	73% ▲
Underwear, lingerie	49%	49%	51%	56% ▲	47% ▼	55% ▲
Accessories (e.g. belts, hats, gloves...)	25% ▼	28%	25% ▼	36% ▲	31% ▲	28%
Activewear / Sportswear	32% ▲	26%	20% ▼	20% ▼	30% ▲	42% ▲
Handbags	20%	14%	15%	29% ▲	21%	21%
None of the above	8%	10%	9%	5% ▼	11% ▲	2% ▼

45% of global consumers indicated changing the duration of clothes ownership since the beginning of the COVID-19 pandemic. Consumers in Italy, France and Spain report keeping their clothes longer. 2 in 10 Americans keep clothes for a shorter period.

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

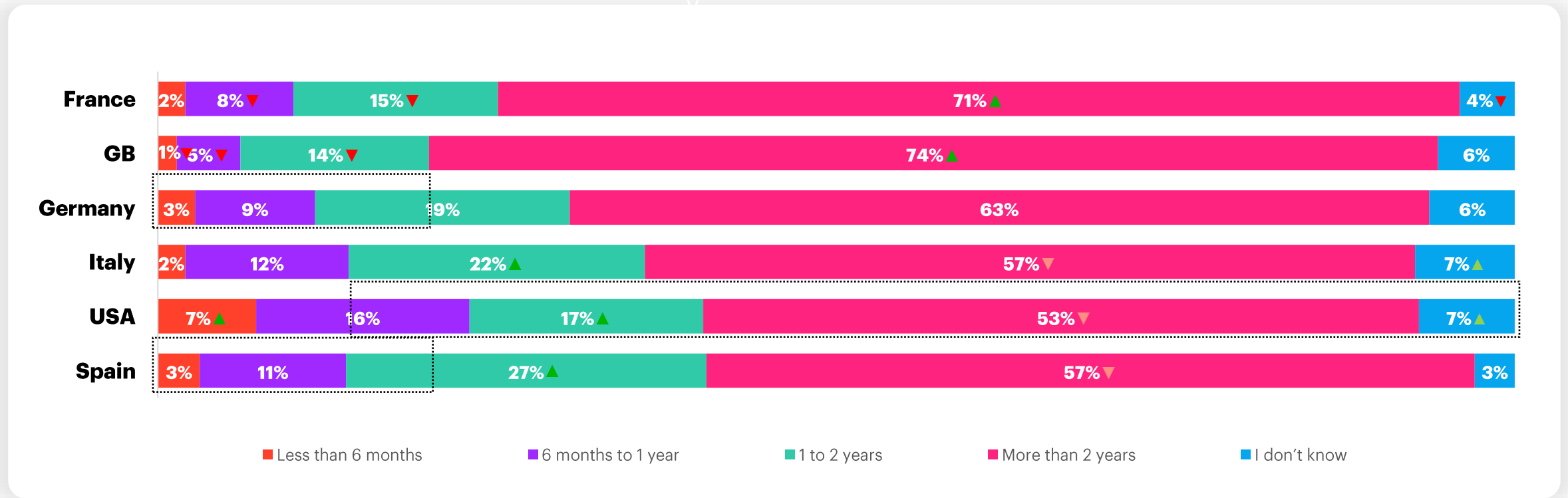


All N=13147 - USA N=3132 - GB N=2008 - Germany N=1949 All N=13147 - Italy N=2027 - France N=2940 - Spain N=1063

▲ ▼ 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. Europeans are keeping their clothes for more than 1 year.

How long would you say you are keeping, in average, your clothes articles nowadays?
 Nat Rep (%)



France N=2940 – GB N=2008 – Germany N=1949 – Italy N=2027 – USA N=3132–Spain N=1063

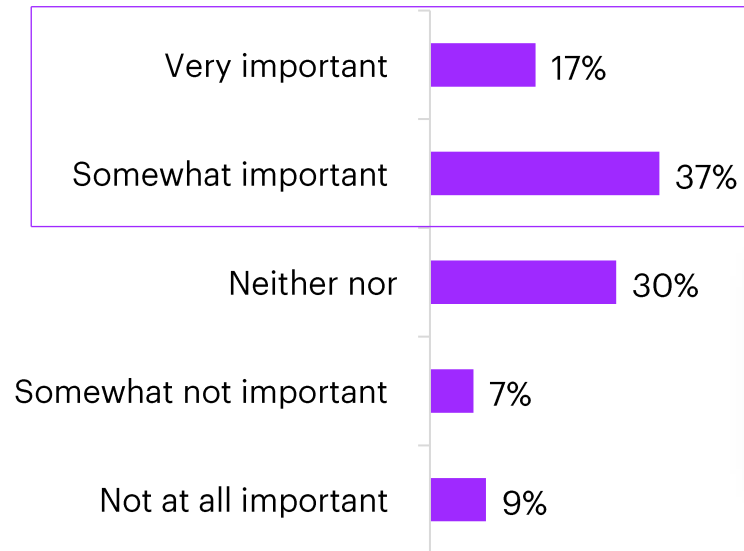
▲ ▼ Significant difference at 95% vs Total countries

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. Spanish and German are the least concerned about sustainability.

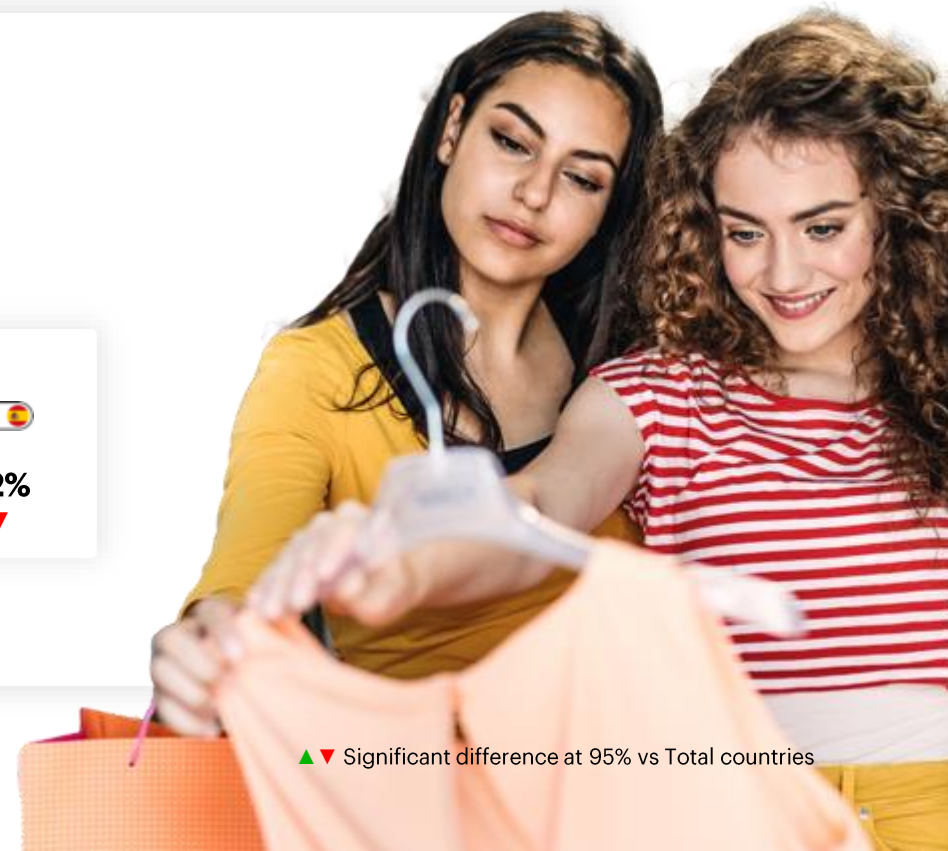
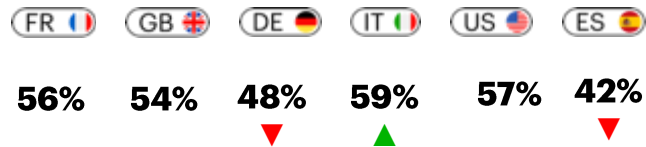
How important is it to you to buy sustainable clothing articles?

% Global consumers



55%

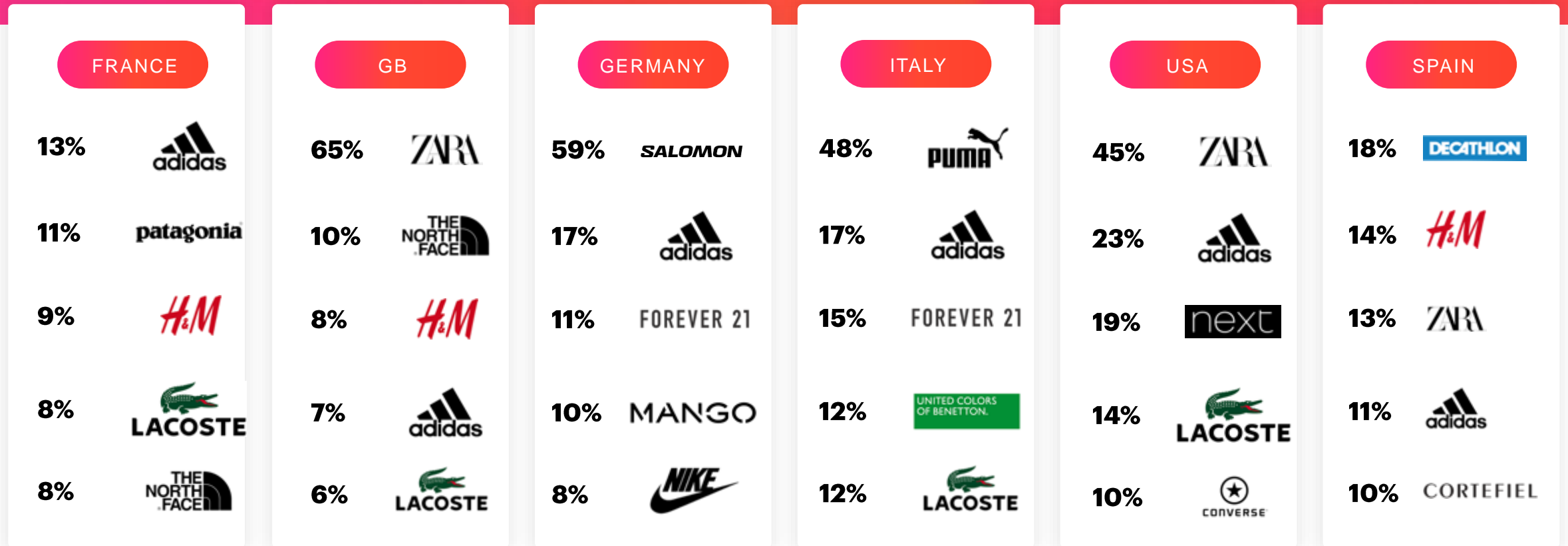
Nat Rep (%)



Top five brands perceived as sustainable

Which of these brands is sustainable according to you?

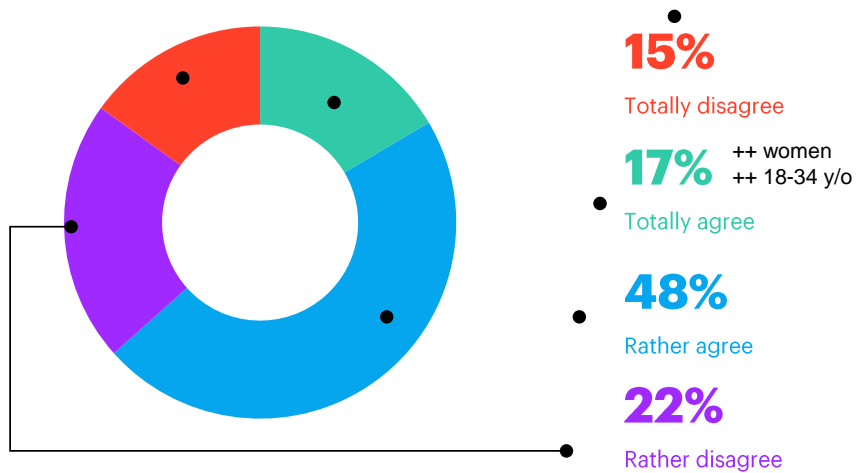
Nat Rep (%)



The majority of global consumers agree that a brand's sustainability impacts its reputation. Spanish and French consumers come out top with net scores of 75% and 71% respectively. However, in both countries' brands are perceived as less sustainable overall.

% 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	Spain
Base N=	2940	2008	1949	2027	3132	1063
Net agree	71% ▲	66%	59% ▼	69%	59% ▼	75% ▲
Totally agree	20% ▲	18%	14% ▼	13% ▼	18% ▼	22% ▲
Rather agree	51% ▲	48%	45% ▼	56% ▲	41% ▼	53% ▲

All N=13147 (France, GB, Germany, Italy, USA, Spain)

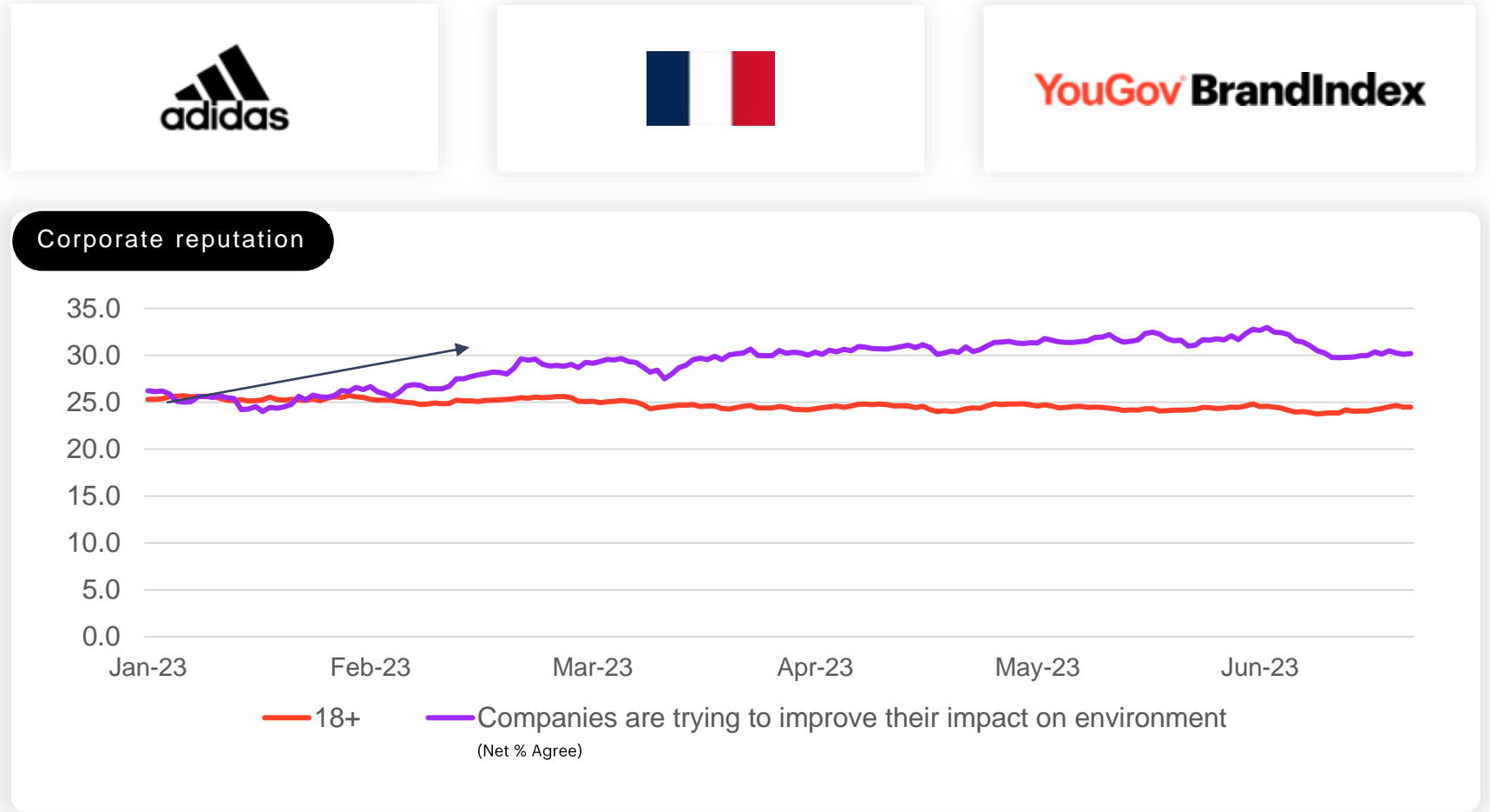
▲ ▼ Significant difference at 95% vs Total countries

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?*



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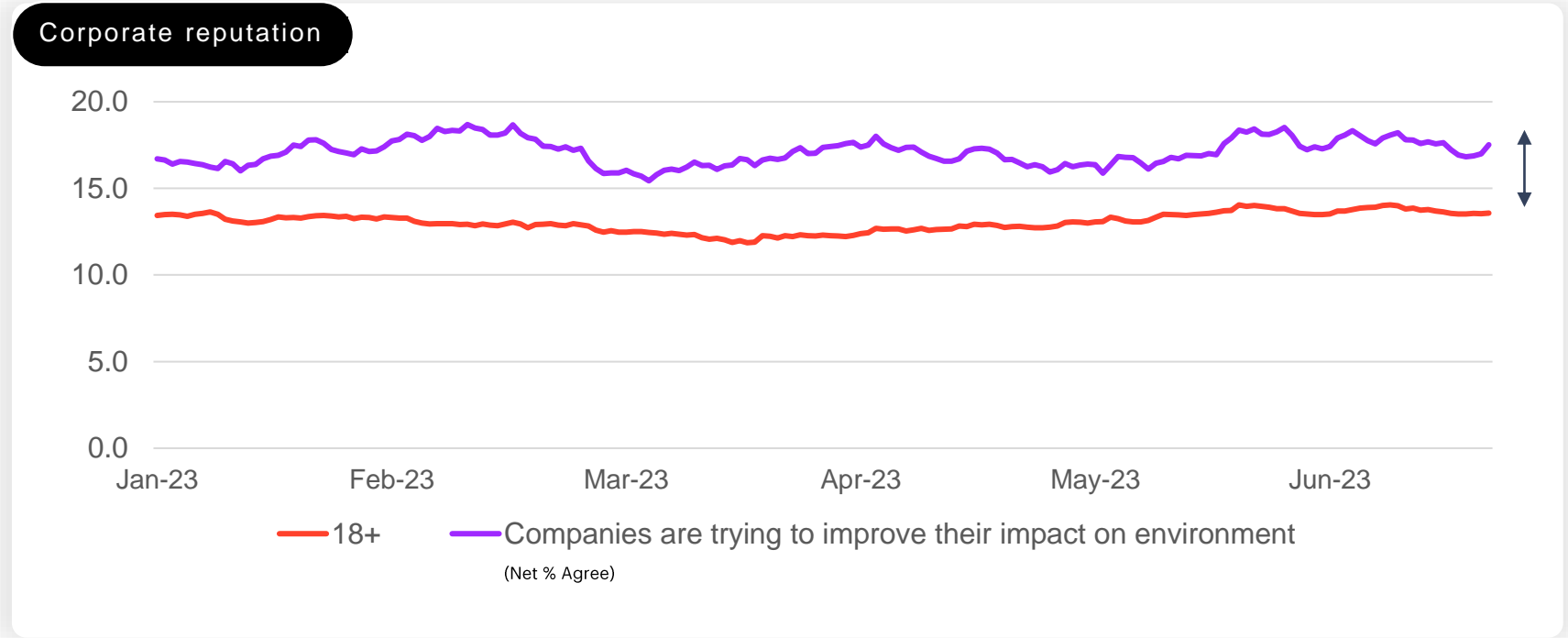
Focus

The Corporate reputation for Zara remains consistent among Brits who are 18+.

However there has been a slight increase in perception of Corporate reputation among Brits who agree that **“companies are trying to improve their impact on the 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=5580 - Target, n=960

[Explore living data >](#)

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.”**

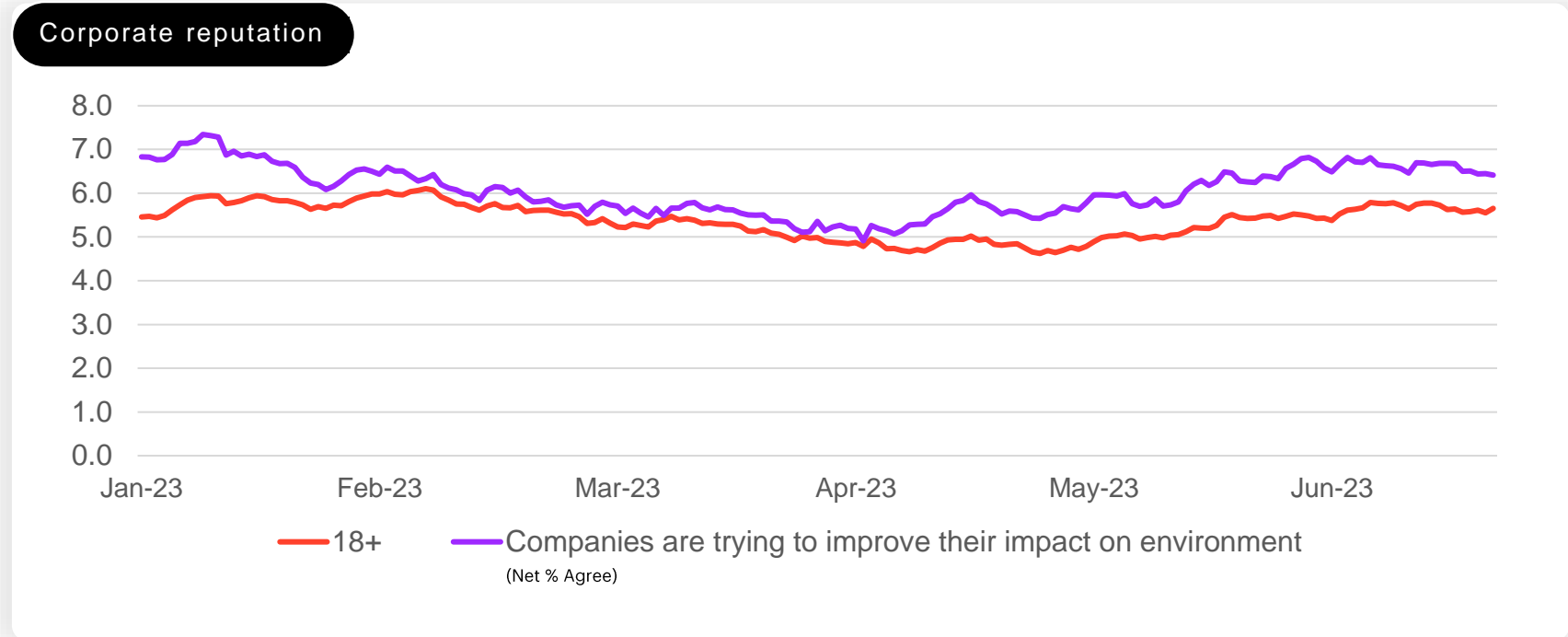
Corporate reputation

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



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

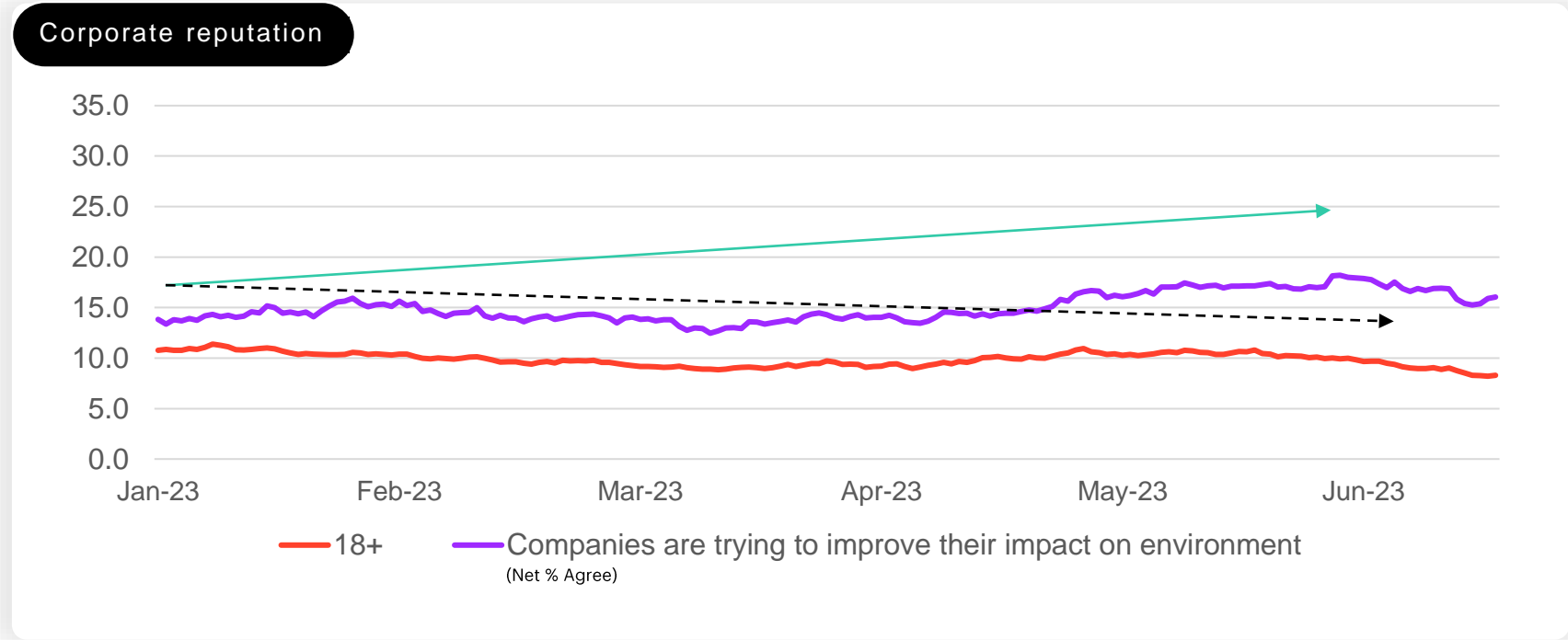
[Explore living data >](#)

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

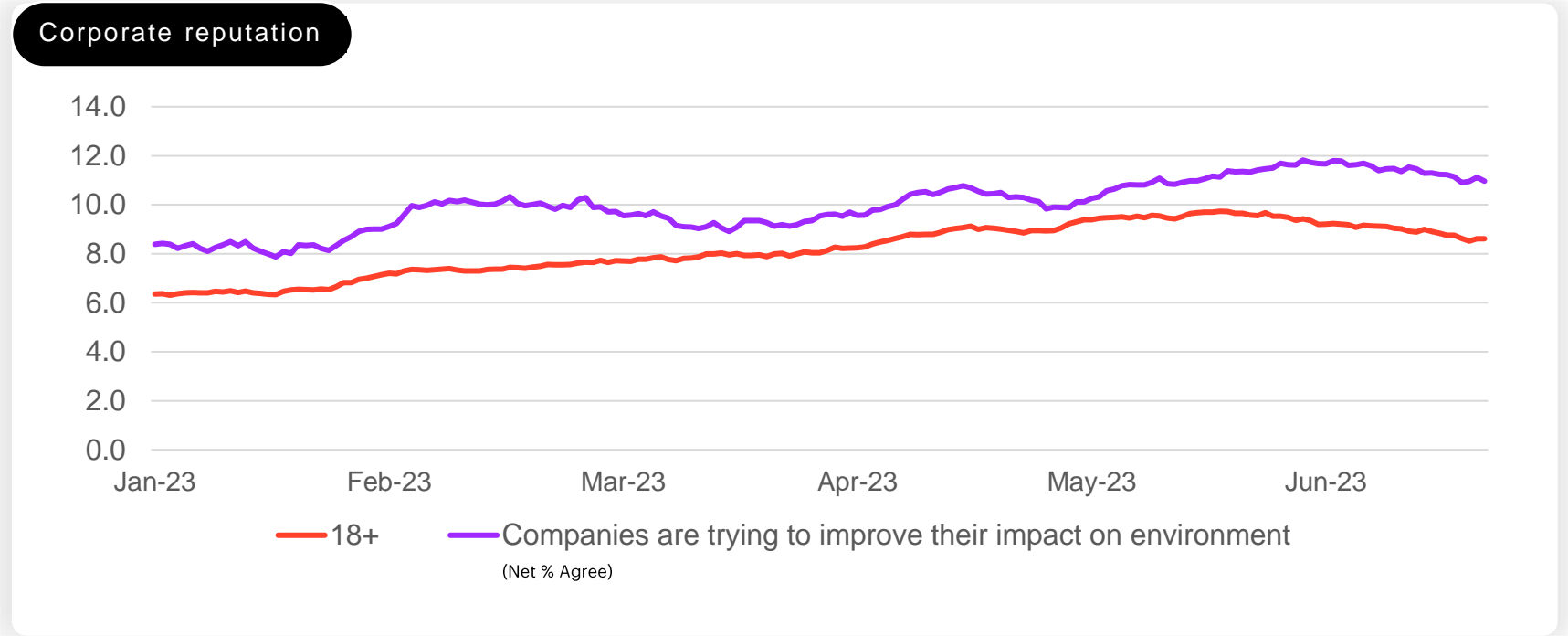
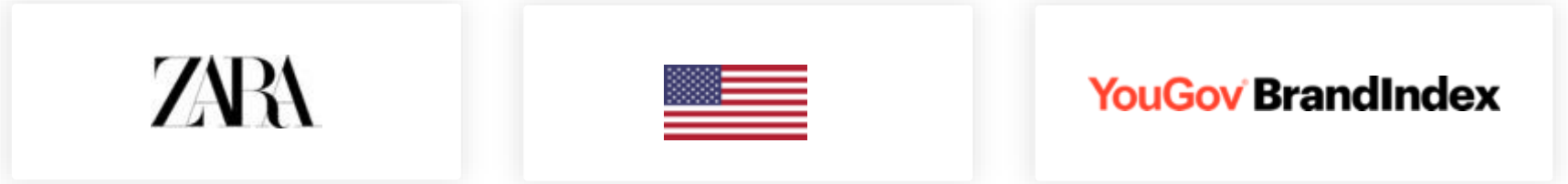
[Explore living data >](#)

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?*



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

[Speak to sales >](#)

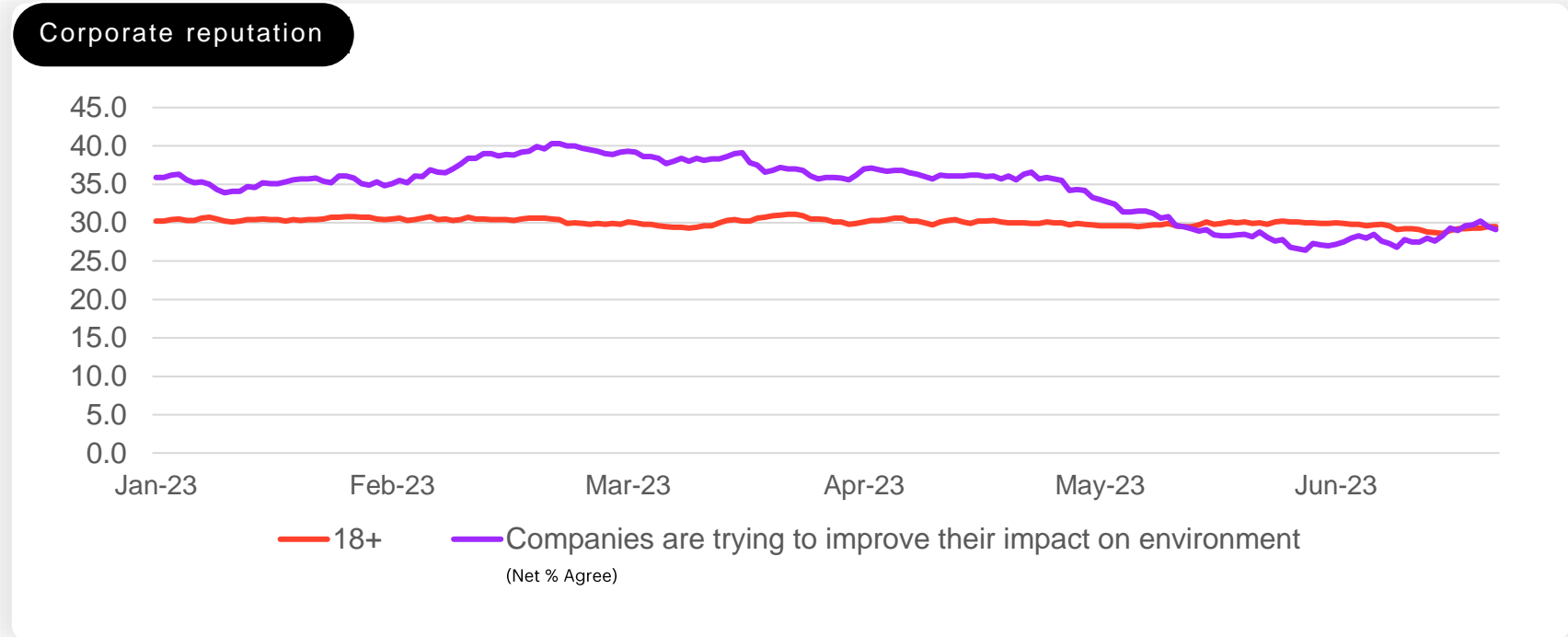
Focus

The Corporate reputation for Decathlon has remained stagnant among Spanish consumers who are 18+.

However, there has been a slight decrease in perception of Corporate reputation among Spanish consumers who agree that **“companies are trying to improve their impact on environment”**.

Corporate reputation

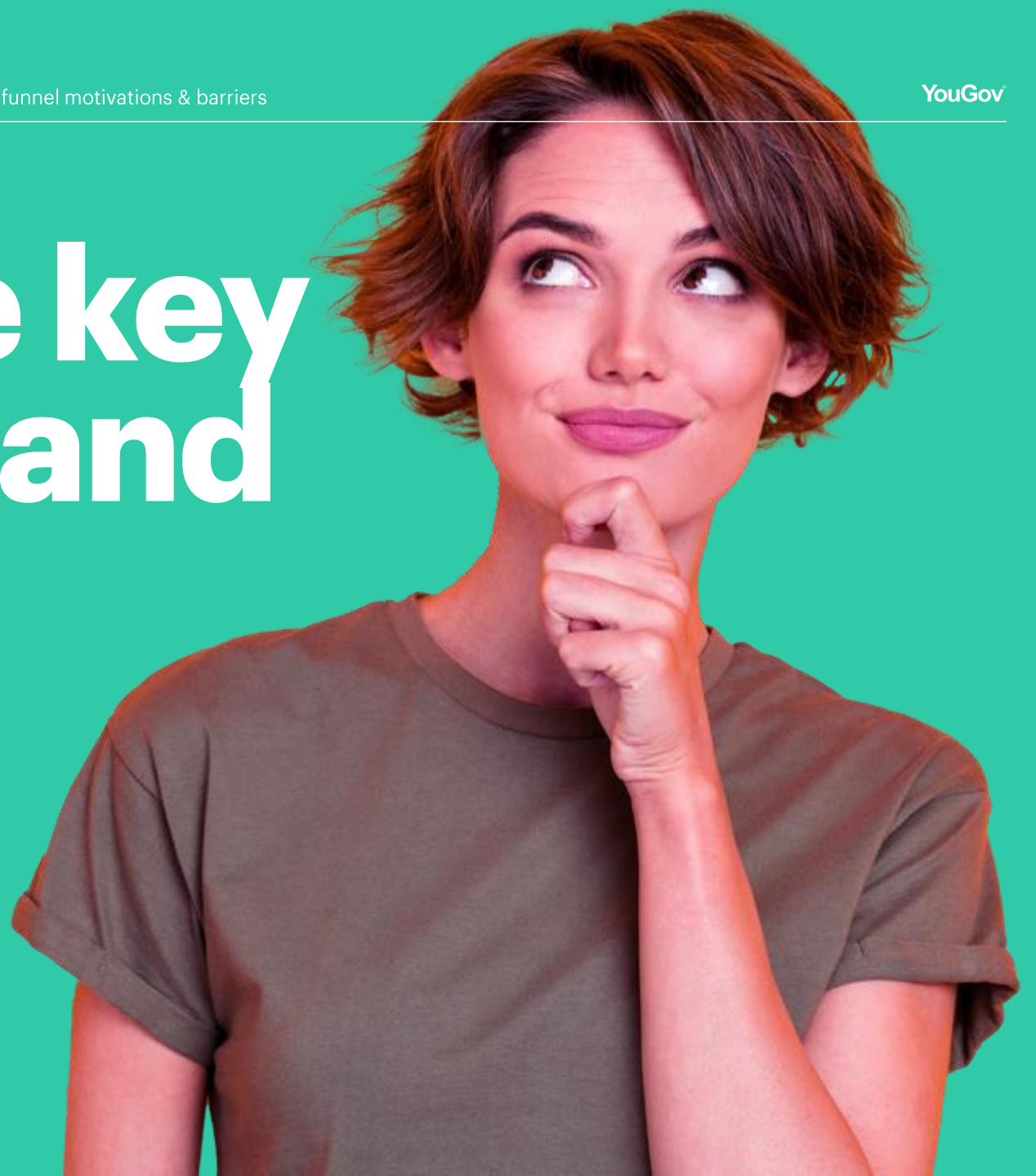
Q► *Imagine you were looking for a job (or advising a friend looking for a job), which of the following brands would you be PROUD / EMBARRASSED to work for?*



Moving Average = 12 weeks - 18+, n= 1063 – 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	Spain
The price	① 81% ▲	① 82% ▲	① 72%	② 78%	② 73% ▼	① 82% ▲
The clothes themselves (NET fabric / fit)	③ 66% ▼	② 80% ▲	② 72%	① 81% ▲	① 74%	③ 55% ▼
The quality (NET quality / product longevity)	② 72%	③ 73% ▲	③ 71%	③ 71%	③ 69% ▼	② 79% ▲
The environment (NET manufacturing condition / manufacturing location / Being sustainable)	30% ▲	27%	▼ 25%	27%	28%	33% ▲
The brand	27% ▲	22% ▼	▼ 19%	21% ▼	28% ▲	25%
Being fashionable	11% ▼	13% ▼	▲ 17%	14%	18% ▲	13% ▼
Recommendation (NET Friends / Family / Influencers)	8%	7% ▼	▼ 8%	5% ▼	14% ▲	12%
Other	2%	2% ▲	1%	1% ▼	2%	4%
None of the above	2% ▼	3%	▲ 3%	1% ▼	3% ▲	1%

Overcome sustainable clothing purchase barriers by communicating:



Price perception



Eco-friendly aspects

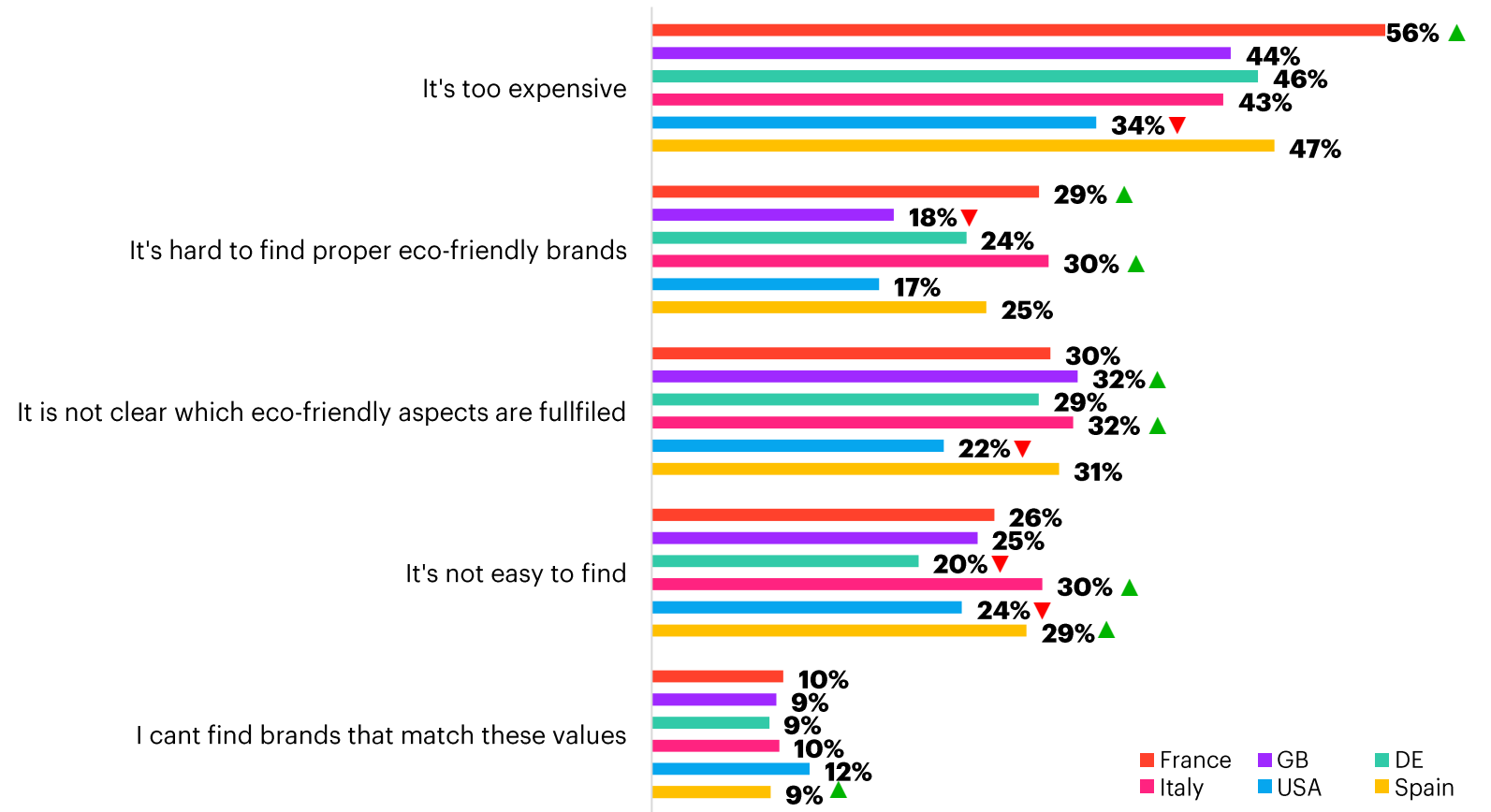


Distribution channels

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

Reasons not to buy sustainable clothes

Nat Rep (%)



France N=2940 – GB N=2008 – Germany N=1949 – Italy N=2027 – USA N=3132 – Spain N=1063

▲ ▼ Significant difference at 95% vs Total countries

Individual consumers are willing to group their clothing purchases and wait longer for shipping.

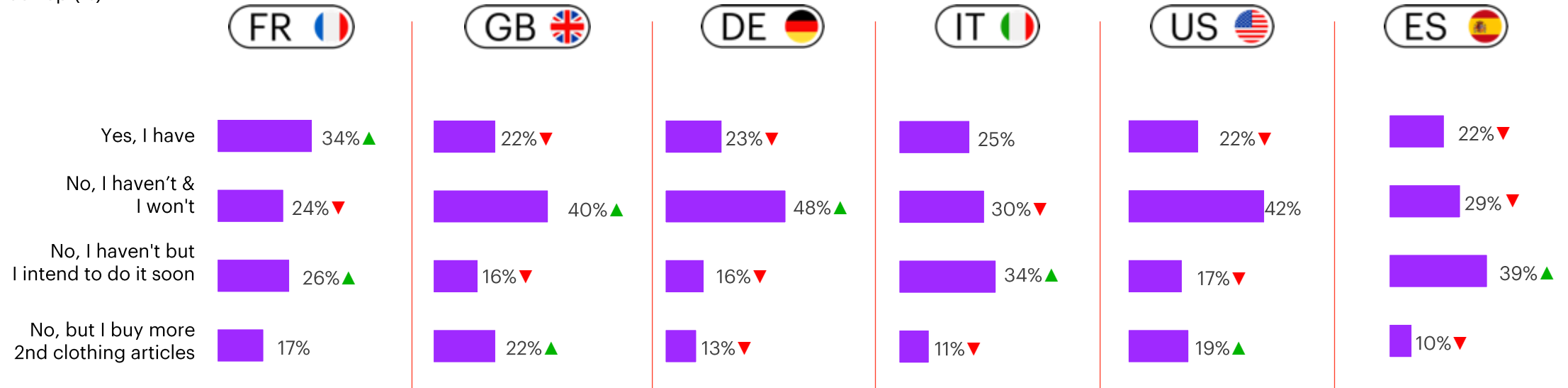


Nearly 1 in 4 consumers have purchased less clothing for sustainable reasons, with Italian and French shoppers more likely to cut back. Nearly 2 out of 5 Spanish and Italians are willing to reduce their clothes purchases soon

“Have you reduced your clothing purchases for sustainable reasons”

Actions already taken to be more sustainable

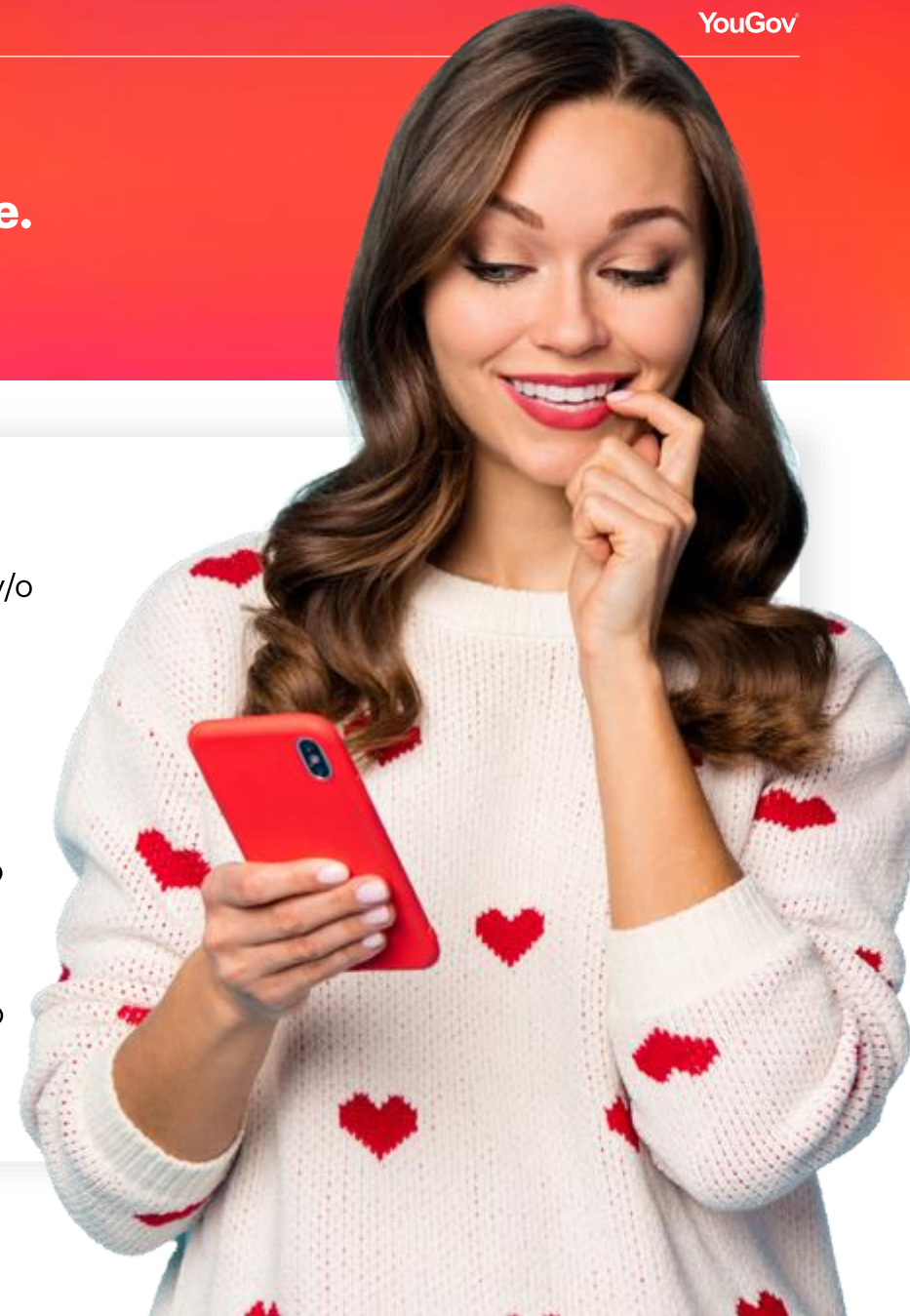
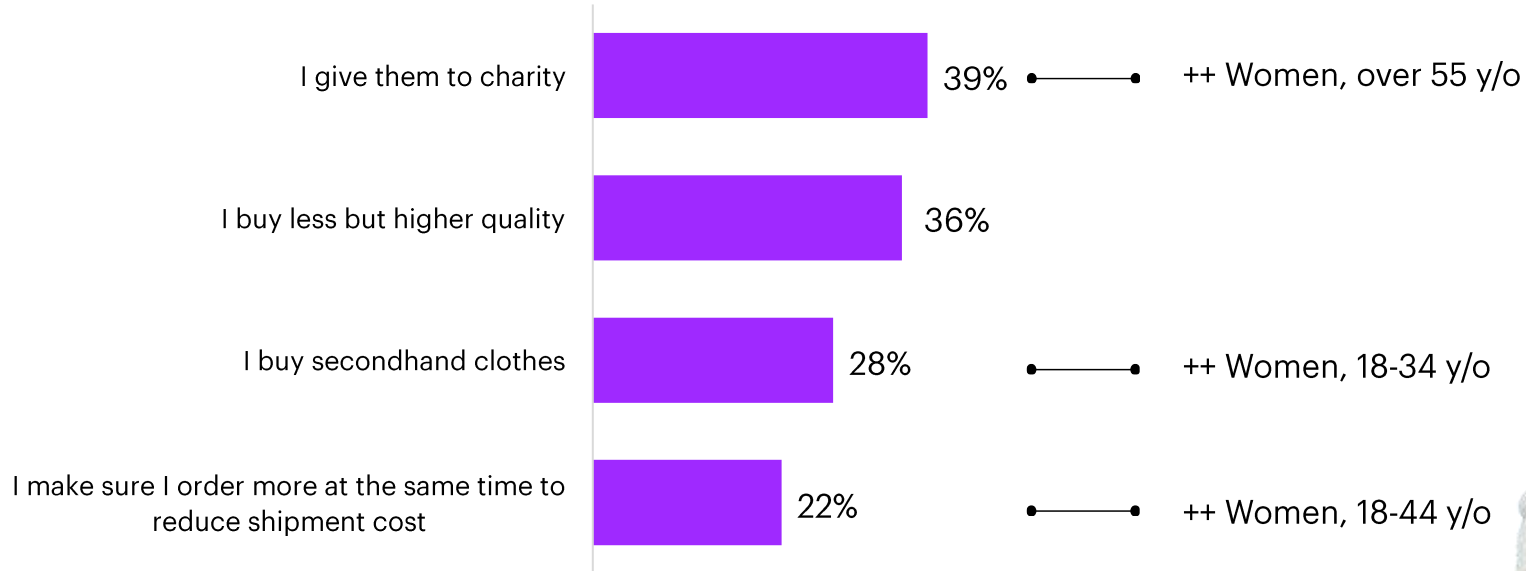
Nat Rep (%)



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

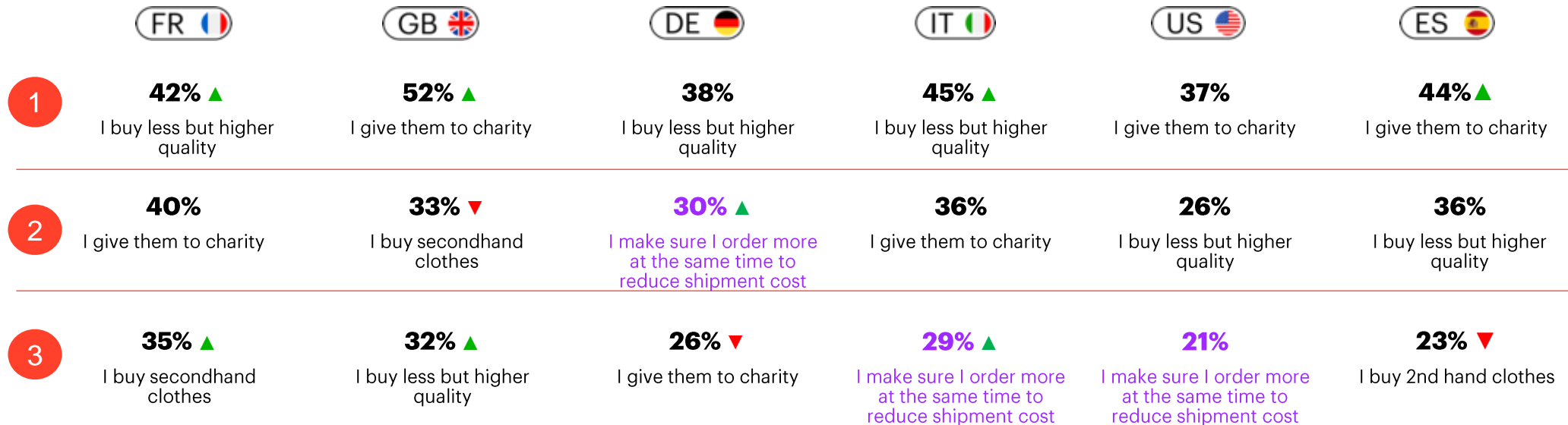


Consumers in France, Germany and Italy are more likely to be proactive, whereas British, American and Spanish consumers are more likely to be reactive (e.g. give clothes to charity).

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

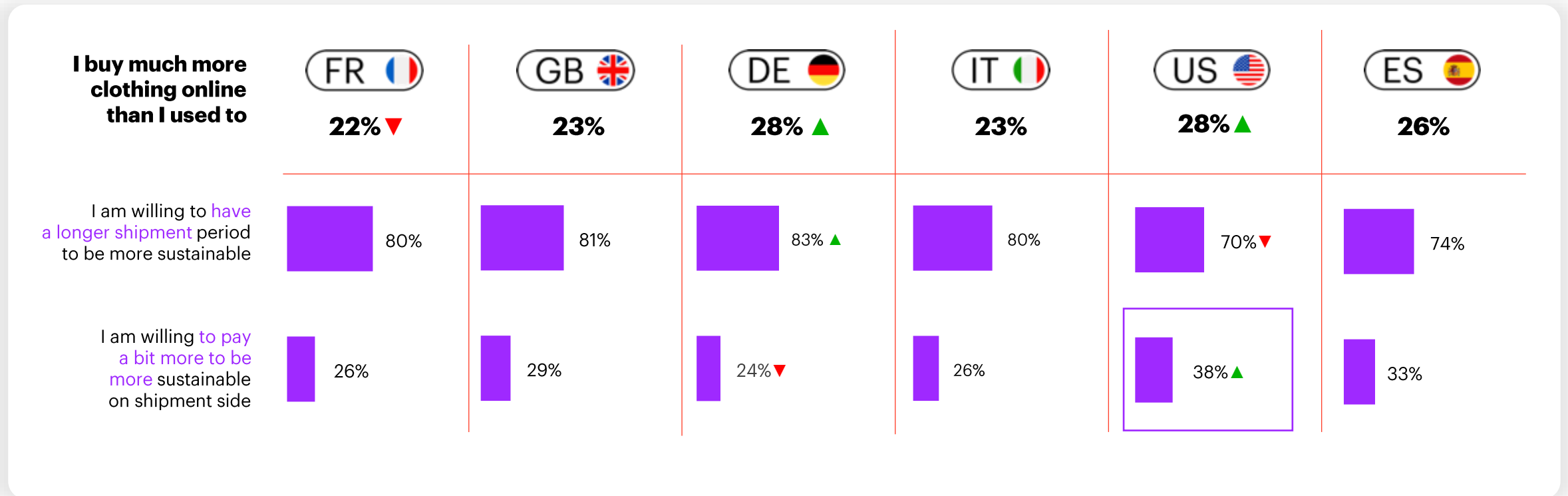
Top 3 actions

Nat Rep (%)



Consumers buying clothing online are willing to wait longer for their shipments in order to be more sustainable. American consumers are also most 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 ?



Base: Those who declared buying clothing articles online (%)

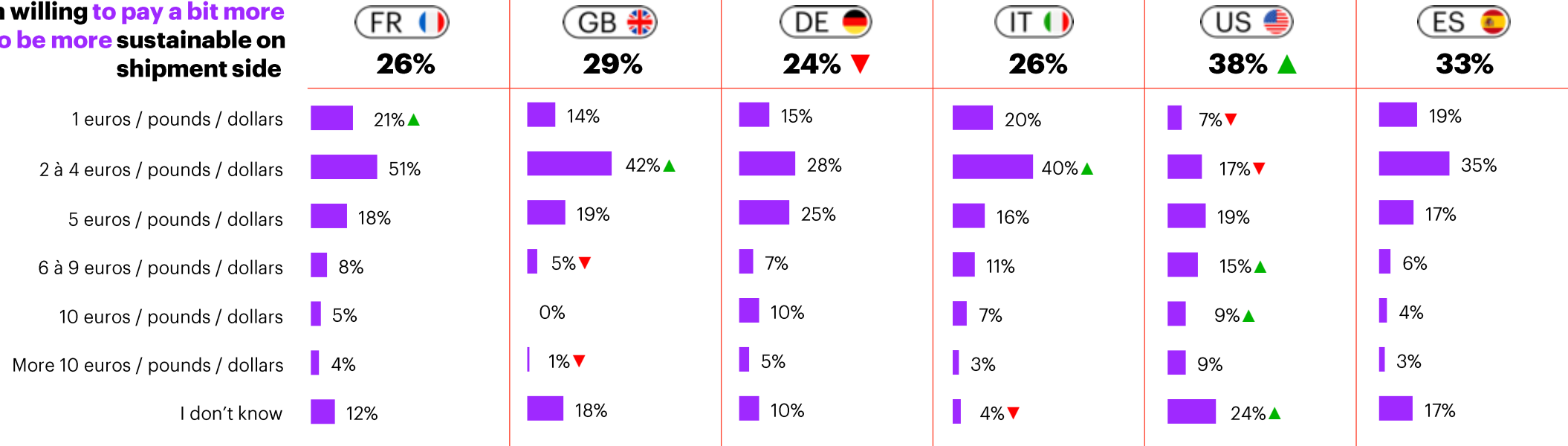
France N=1280 – GB N=759 – Germany N=726 – Italy N=373 – USA N=988 Italy N=373 – USA N=988 – Spain N=237

▲ ▼ Significant difference at 95% vs Total countries

Readiness to pay up to 5 €/£/\$ for a more sustainable shipment overall. In Southern Europe, the willingness of payments is slightly lower.

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

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

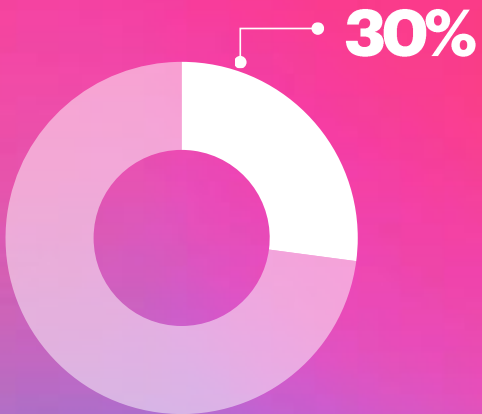


Base : those who declared buying clothing articles online (%)

Global consumers

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=4342)

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

	18-24	25-34	35-44	45-54	+55
Base	401	160	756	598	1433

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

43% ▲	30%	31%	25% ▼	22% ▼
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How much are they willing to pay?

1 euro	7% ▼	15%	12%	17%	19%
2 to 4 euros	34%	35%	33%	28%	31%
5 euros	29% ▲	16%	16%	15%	16%
6 to 9 euros	14%	12%	10%	7%	3% ▼
10 euros	5%	6%	6%	4%	5%
More than 10 euros	3%	6%	7%	5%	2% ▼
I don't know	9% ▼	16%	16%	24% ▲	25% ▲

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?



Who are the Spanish consumers that care about Sustainability in fashion?



41%

think is important or very important to buy sustainable clothing*

estimated market size = 15.9 million adults

Nat rep %



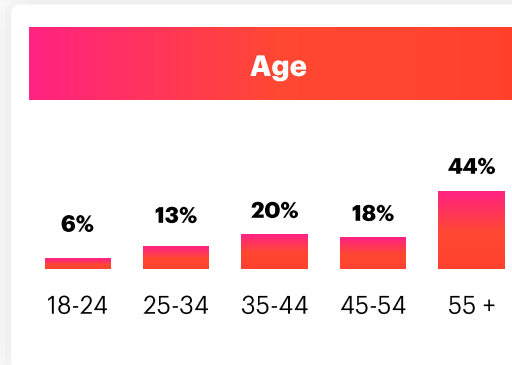
41%

think it is important or very important to buy sustainable clothing*

This segmentation is primarily older, with 52% being 55+ years old.

This group is interested in the national news, travel and vacations and health and medicine. They are clearly more engaged towards brands that are environmentally friendly.

Gender	
Female	57% ▲
Male	43% ▼



Income	
High income	5%
Middle income	50%
Low income	35%

General Interest	
National news	55% ▲
Travels and vacations	51%
Health and medicine	50% ▲
Environment, sustainable development	46% ▲
International news	46%

Area	
A1 Northeast	23%
A2 Levante	15%
A3 South	25%
A4 Center	22%
A5 Northwest	9%
A6 North	7%

Psychographics		
"I make an effort to support local businesses." 80% ▲	"I don't mind paying more for products that are good for the environment" 66% ▲	"I wouldn't mind having a wind turbine in my area" 48% ▲
"I like design trends that are that are simple" 79% ▲	"I prefer brands that are sustainable" 74% ▲	

Parents kids >18 y/o	
Yes	33%



41%

think it is important or very important to buy sustainable clothing*

Product placement, TV program sponsorship and event sponsorships are the most effective way to communicate with this audience.

Antena 3 is their main TV network with 49% saying that they watch this network regularly.

87% of this target group say that they need to be informed before a making abig purchase.

Type of sponsorship noticed

Product placement	42%▲
Sponsor of TV show	35%
Sponsor of an event	35%
Sponsor of user generated content	25%▲
Sponsor of a social media post	22%
Sponsor of a sports team	18%

TV Networks watched regularly

Antena 3	51%
La 1	43%▲
La Sexta	36%▲
Cuatro	35%▲
Telecinco	26%

Attitudes towards retail

“I never make big purchases without being well informed” 87%▲

“I feel sorry for small businesses that had to close because of multinational companies or global online businesses” 81%

“I like having good quality products” 79%

“I prefer to buy in local businesses” 75%▲

ES 

41%

think it is important or very important to buy sustainable clothing*



Attitudes towards advertising

"I like brands that are willing to get involved in social issues." ▲

Membership of social network

72%

Facebook

58%

Instagram

53%

YouTube

41%

X/Twitter



41%

think it is important or very important to buy sustainable clothing*

Decathlon is the top (43%) fashion brand considered among Spanish consumers.

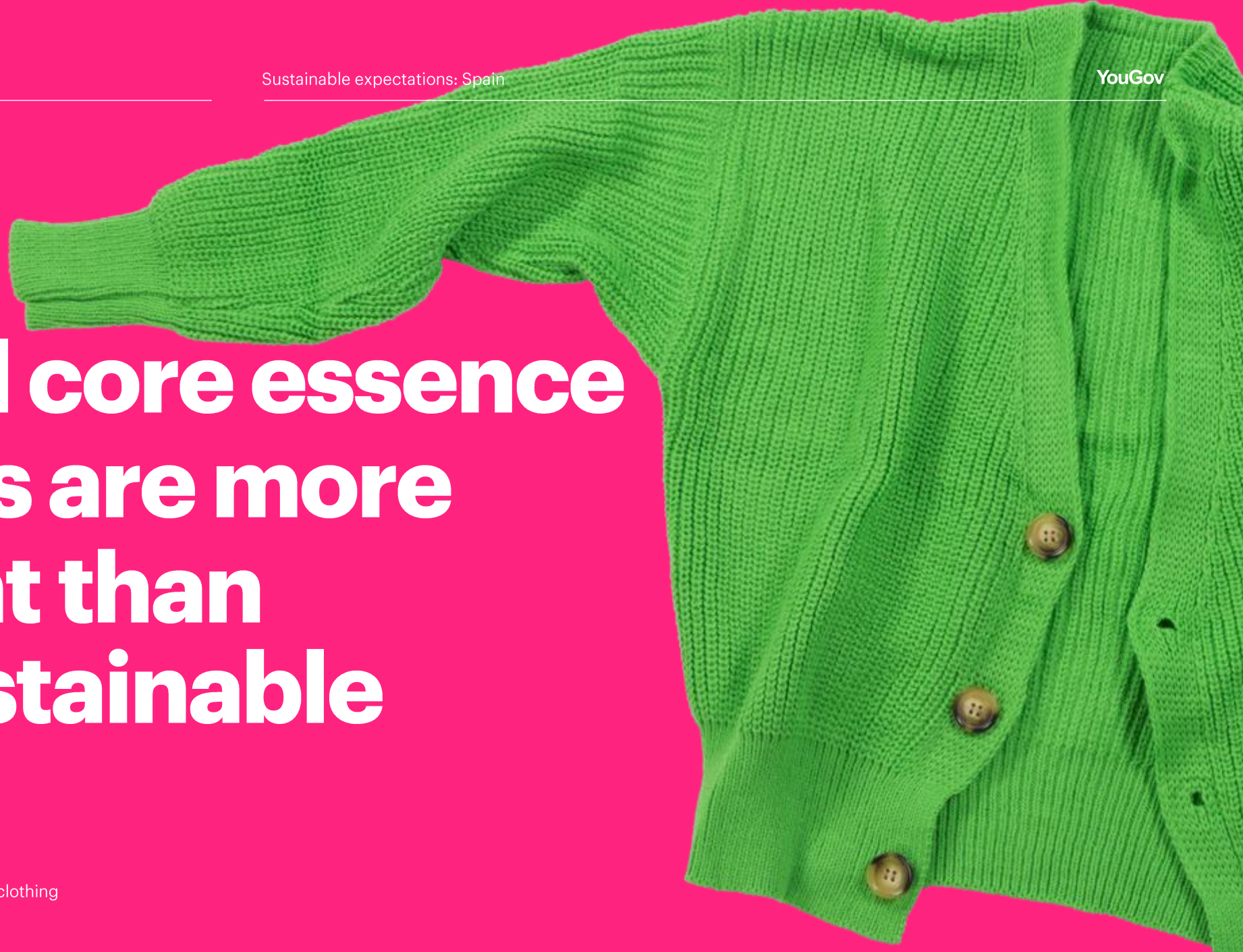
Top 10 considered fashion brands – sustainable Spanish


1	Decathlon	43%
2	Zara	37%
3	Primark	28%
4	El Corte Inglés	27%
5	H&M	27%
6	Springfield	26%▲
7	Adidas	24%
8	Nike	23%
9	Pull & Bear	20%
10	Reebok	18%



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

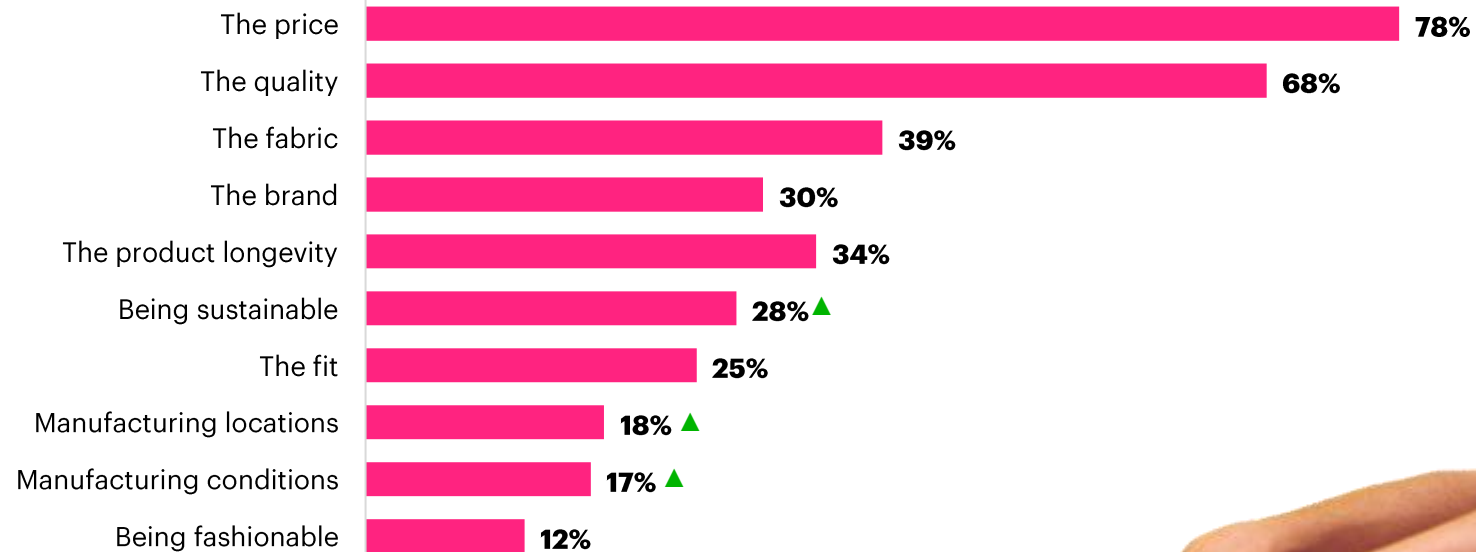
Base: important or very important to buy sustainable clothing



ES 

What matters when buying clothes?

While this audience emphasizes sustainability and manufacturing conditions, price remains much more important.




▲ ▼ Indicate significantly higher or lower than Nat rep with a 95% confidence level

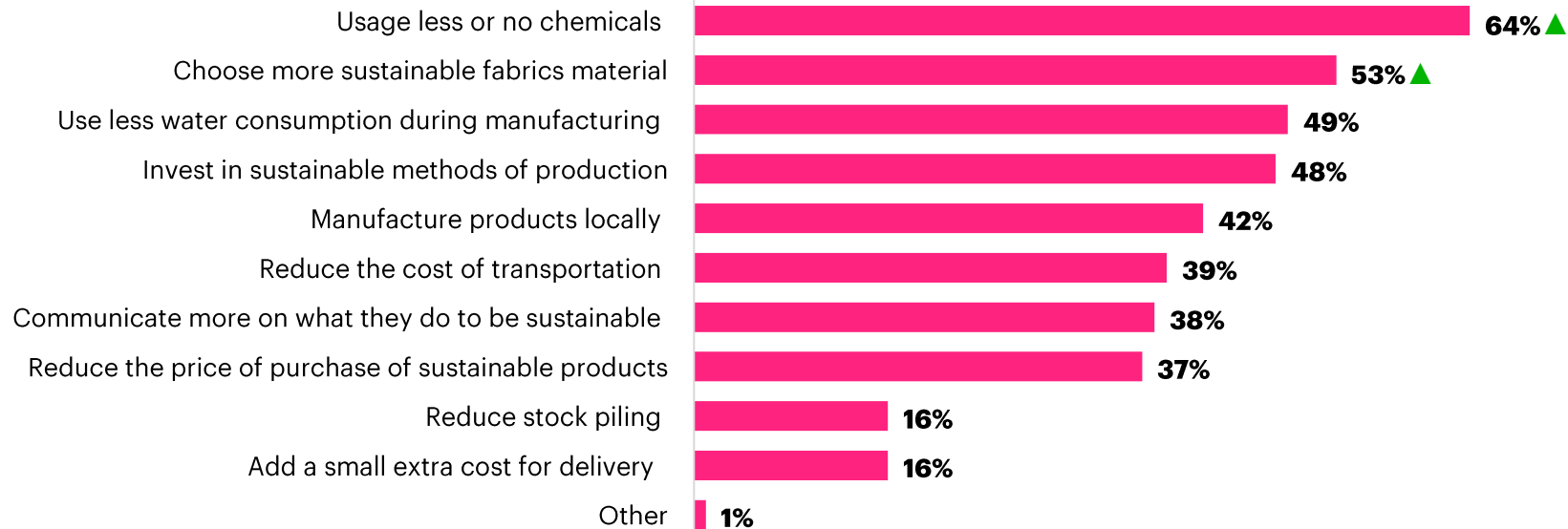
Q. What are all the criteria that are important to you when purchasing clothing articles?

Base -> Care about sustainability- Spain N=355



ES 

What can clothing brands do to be more sustainable?



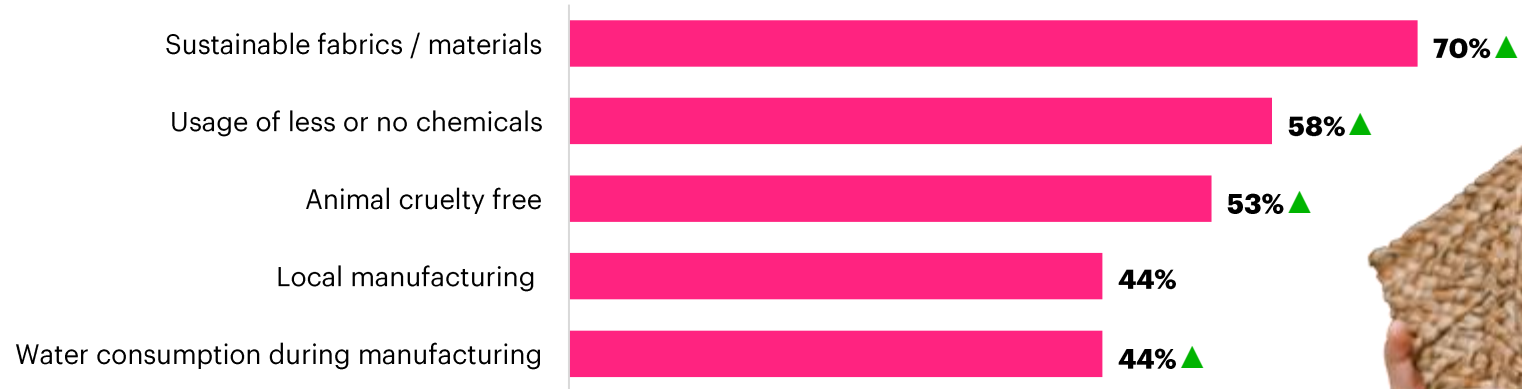
Base: 41% think is important or very important to buy sustainable clothing

▲ ▼ Indicate significantly higher or lower than Nat rep with a 95% confidence level



ES 

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



Base: 41% think is important or very important to buy sustainable clothing

▲ ▼ 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 -> Care about sustainability- Spain N=355



Brands should communicate reduction/removal of chemical usage

Base: 41% think is important or very important to buy sustainable clothing



Key findings

Part 1: Market status

Consumers are interested in and are becoming more engaged with the environment. However, price is still the greatest motivational and influential factor for most global consumers.

Market status

- **7 out of 10** consumers have bought more than one item of clothing in the last **12 months**.
- **Consumers' relationship with clothes is changing**. Consumers are keeping their clothes for longer, especially in France and Italy. British and Italian consumers keep clothes for the longest time (more than 2 years) compared to consumers in other markets. 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 to be more sustainable**. Younger consumers are willing to pay more for sustainable delivery (between 1 and 5 £/\$/€).

Motivations & barriers

- **The price and essence of clothes (fit, quality, fabric) are key purchase motivators** for the general public, including those engaged with the environment. **Sustainability is a secondary consideration, ranking 4th as most important motivator** among global consumers.
- For consumers in the UK and the US, **animal cruelty free and sustainable fabrics/materials are the top two most important elements** when buying clothes.
- **Reducing the chemicals** used in clothes production, investing in **sustainable fabrics, reducing the cost of sustainable products** and investing **in sustainable production methods** are **the top actions consumers in the UK and the US want to see from fashion brands**.

Part #2: Market potential for brands and converting new sustainable fashion shoppers

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