



Consumer Survey:

SUSTAINABILITY IN FASHION RETAIL



Introduction

Currently almost 20% of global water waste is produced by the fashion industry, according to the UNECE¹. However, there have been recent efforts aimed at improving sustainability in fashion — from the promotion of eco-friendly clothing by brands like Everlane and Reformation² to a French initiative championed by French president Emmanuel Macron³. Nosto recently commissioned an online study to further understand consumer perspectives around sustainability and the results revealed a number of interesting insights and contrasts. Here are some of the findings.

Survey Methodology

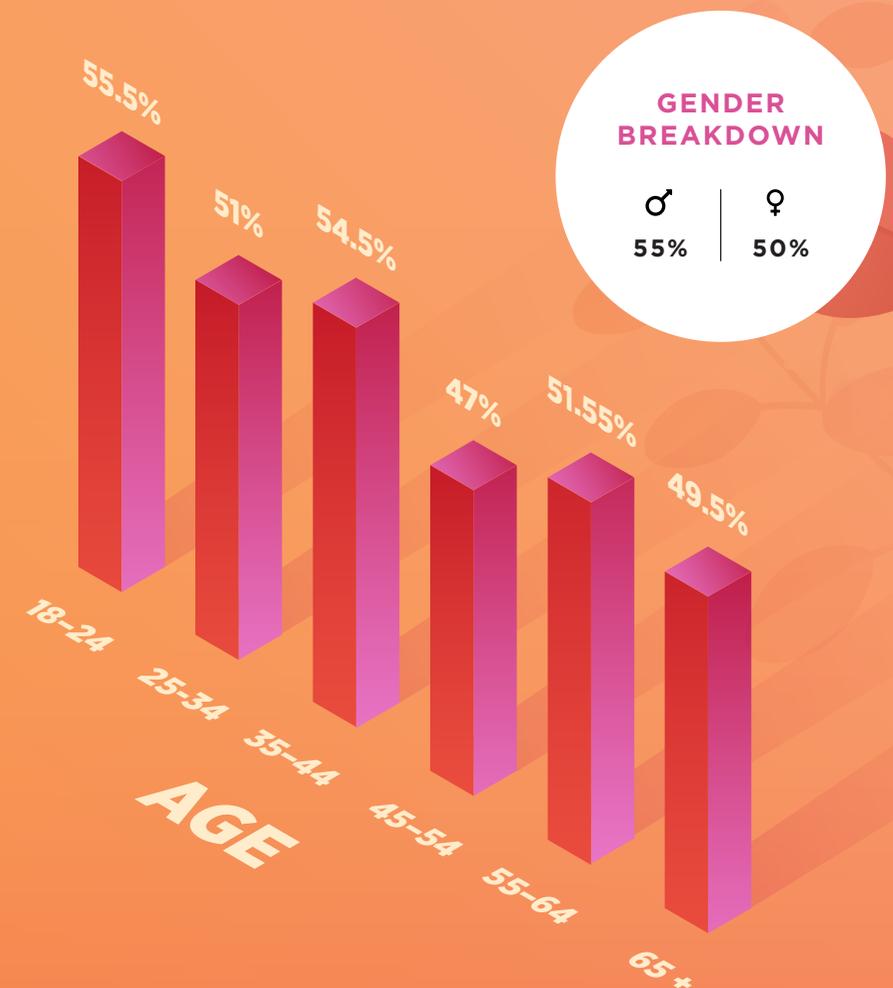
Nosto commissioned an online survey of 2,000 consumers (1,000 in the US and 1,000 in the UK) through online survey company Maru/Usurv⁴ in April 2019. An online methodology was utilized for this survey, and respondents were recruited from double opt-in market research panels to complete the questionnaire. The questionnaire consisted of 3 multiple choice questions designed to elicit responses regarding sustainability in the fashion industry.

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(1) <https://www.unece.org/info/media/presscurrent-press-h/forestry-and-timber/2018/un-alliance-aims-to-put-fashion-on-path-to-sustainability/doc.html>
(2) <https://www.thegoodtrade.com/features/fair-trade-clothing>
(3) <http://fortune.com/2019/05/15/france-ban-unsold-clothing-sustainable-fashion/>
(4) <http://www.maruusurv.com/>
(5) <https://www.nielsen.com/eu/en/insights/news/2015/green-generation-millennials-say-sustainability-is-a-shopping-priority.html>

Consumer Perspectives on Sustainable Fashion, Summarized

Over half of survey respondents (**52%**) said they want the fashion industry to become more sustainable. This opinion was broadly similar across both men (**55%**) and women (**50%**). Notably, the desire for sustainability was also broadly similar across most age groups — suggesting a shift in the trend that has been historically associated with millennial (25-34) and Generation Z (18-24) consumers⁵.



How Strong is Consumer Commitment to Sustainable Fashion Brands?

Survey results revealed that **50%** of consumers who desire sustainable fashion would be more likely to buy clothes from companies they know are committed to sustainability, while **28%** of them would stop buying clothes from a company if they find out it is not committed to the cause. Additionally, **57%** try to keep clothes longer because it's better for the environment — though survey results revealed a larger gap between men and women in this category (**52%** vs. **60%** respectively).

While a large number of consumers desire sustainable fashion products, research reveals many people aren't willing to pay extra for them. Only **32%** of consumers would pay more for a product from a brand that they believe is committed to sustainability. At the same time, **46%** say they prefer to buy clothes that are made sustainability rather than buying them just because they're from a well-known brand, and only **29%** would pay more for a sustainably-made version of the same item. Nevertheless, these results show that a subset of consumers feel strongly about paying for products that are environmentally friendly.

» **32% of consumers would pay more for a product from a brand that they believe is committed to sustainability**

Gender and Demographic Breakdown

	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
I would be more likely to buy clothes from companies that I know are committed to sustainability	50%	48%	51%	49%	45%	49%	55%	50%	48%
I would stop buying clothes from a company if I find out that it is not committed to sustainability	28%	32%	26%	28%	27%	33%	32%	24%	20%
I try to keep clothes for longer because it's better for the environment	57%	52%	60%	60%	46%	56%	61%	59%	64%
I will pay more for a sustainably made version of the same item	29%	31%	28%	29%	30%	33%	32%	26%	18%
I will pay more for items from a brand that I believe is committed to sustainability	32%	32%	31%	30%	33%	31%	34%	33%	22%

Percentages based on subset of survey respondents who desire sustainability in fashion.

Consumer Expectations of Sustainable Fashion Brands

Environmentally-conscious consumers have clear ideas of how they want fashion brands to become more sustainable. Survey results revealed the most important areas consumers believe fashion retailers should focus on to become more sustainable:

- Reduce the amount of packaging **(75%)**
- Provide fair pay and good working conditions **(74%)**
- Use renewable and recyclable materials **(73%)**
- Make clothes that are designed to last longer **(71%)**
- Use fewer resources — e.g power, water, materials **(64%)**
- Focus on innovation to come up with new environmentally-friendly materials and methods for making clothes **(61%)**
- Create initiatives to help people resell or recycle their old clothes **(59%)**
- Make clothes in classic styles that will stay in fashion longer (to encourage people to keep them longer **(49%)**)

» **75% of consumers believe that fashion retailers should reduce the amount of packaging to become more sustainable**

Gender and Demographic Breakdown

	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Reduce the amount of packaging	75%	72%	77%	71%	69%	72%	79%	84%	76%
Provide fair pay and good working conditions	74%	68%	78%	70%	71%	74%	73%	77%	78%
Use renewable and recyclable materials	73%	74%	72%	72%	68%	69%	76%	79%	75%
Make clothes that are designed to last longer	71%	70%	72%	75%	71%	71%	66%	72%	74%
Use fewer resources — e.g power, water, materials	64%	64%	64%	63%	58%	59%	66%	70%	71%
Focus on innovation to come up with new environmentally-friendly materials and methods for making clothes	61%	62%	61%	56%	61%	60%	61%	65%	66%
Create initiatives to help people resell or recycle their old clothes	59%	55%	62%	64%	55%	57%	61%	59%	64%
Make clothes in classic styles that will stay in fashion longer (to encourage people to keep them longer)	49%	42%	53%	51%	44%	47%	50%	50%	56%

Percentages based on subset of survey respondents who desire sustainability in fashion.

Opportunities for Fashion Brands to Embrace Sustainability

There are a number of ways fashion brands can do their part for the environment while still driving growth. One of the most crucial ways they can do so is to be more transparent about the steps they're taking to embrace sustainability — but transparency remains a huge question mark in the eyes of consumers.

While environmentally-conscious fashion brands like Patagonia⁶ and Everlane⁷ are vocal about the steps they're taken to produce sustainable products, identifying which brands are actually committed to the cause remains a grey area. **45%** of survey respondents say it is difficult to know which fashion companies are truly committed to sustainability, while only **23%** of them say they have a generally good idea of what fashion brands mean when they say they are committed to sustainability. This presents retailers with an opportunity to capitalize on the confusion surrounding sustainability, **and define their stance on sustainability in a way that resonates with their customers.**

One key opportunity for fashion brands is increasing their sustainability messaging — although the opinion of *how* they should do it differs across some age demographics. While **62%** of consumers agreed that brands should be doing more to promote clothing made in sustainable ways, consumers between the ages of 18-24 showed the highest affinity for the use of online influencers and celebrities to promote sustainable products (**51%** vs. **35%** overall). This suggests that using influencer marketing to promote sustainability may be a turnoff for some consumers — thus, brands should be more conscious of their target audience when using this strategy to raise awareness.

Meanwhile, **43%** of consumers want brands to be more aggressive about showing sustainable products on-site to further personalize their shopping experience, while incentive still proves to go a long way with shoppers: **62%** of consumers would like to receive discounts on clothing ranges that are more sustainable.

(6) <https://www.retaildive.com/news/patagonia-doubles-down-on-sustainability/546144/>
 (7) <https://www.everlane.com/about>

Gender and Demographic Breakdown

Here is a roundup of the top 7 initiatives consumers believe retailers should embrace, broken down by gender and age demographic:

	Total	Male	Female	18-24	25-34	35-44	45-54	55-64	65+
Clearly label clothes that are made in sustainable ways	74%	72%	75%	62%	70%	71%	77%	84%	80%
Do more to advertise + promote clothing made in sustainable ways	62%	58%	64%	63%	61%	61%	59%	68%	55%
Work with online influencers/celebrities to promote close that are made sustainably	35%	36%	35%	51%	39%	36%	36%	28%	20%
Offer discounts on clothing ranges that are more sustainable	62%	59%	65%	62%	57%	62%	64%	65%	69%
Automatically show people more sustainable alternatives to items they are viewing online	43%	41%	45%	43%	40%	45%	40%	45%	48%
Always recommend/promote the most sustainable items first to online shoppers	41%	40%	41%	46%	45%	45%	36%	30%	46%
Allow online shoppers to trade in their used clothes for discounts on new items	54%	47%	59%	63%	57%	58%	53%	46%	46%

Percentages based on subset of survey respondents who desire sustainability in fashion.



Nosto enables retailers to deliver personalized digital shopping experiences at every touch point, across every device. An AI-Powered Personalization Platform designed for ease of use, Nosto empowers retailers to build, launch and optimize 1:1 omnichannel marketing campaigns and digital experiences without the need for dedicated IT resources or a lengthy implementation process. Leading commerce brands in over 100 countries use Nosto to grow their business and delight their customers. Nosto supports its clients from its offices in Helsinki, Berlin, Stockholm, London, New York, Los Angeles and Paris.

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