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# Can the fashion industry sustain its sustainability?

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A REPORT BY NOSTO SOLUTIONS LTD  
SEPTEMBER 2022



A survey of shoppers in North America and the UK highlights **how the cost of living crisis is shifting consumer sentiment** around sustainability within fashion—and shows **what retailers should prioritise** as consumer spending tightens

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# Executive summary

This report discusses the findings of new international research that surveyed consumers on their attitudes and behaviors around sustainability within the fashion industry.

The aim was to give fashion retailers fresh insight into consumers' perspectives on this, and to help those retailers align their offerings with evolving consumer needs. Specifically, the research sought to investigate how current global inflationary pressures could be impacting intentions around sustainable fashion consumption.

To carry out the research, Nosto commissioned international market research consultancy, Censuswide, to conduct an online survey of 2,019 adult consumers. This survey took place between 13 June and 16 June, 2022, and includes a mix of 1,002 US-based respondents, and 1,017 UK-based respondents. Both samples are nationally representative based on age, gender and region.



# Introduction

The last decade saw promising demand for sustainable fashion. Public awareness of the industry's environmental impact grew. Throwaway consumption sparked greater pressures from activists and governments alike. Meanwhile, consumers reassessed their values to make sustainability more of a focus.

But today, the world is undergoing a severe cost of living crisis. Unprecedented food and energy price surges, coupled with COVID-19's disruption, have sparked extreme financial pressures that are being felt sharply around the planet.

Recessions are imminent across much of the developed world, including both the US and UK, while 71 million people have already been pushed into poverty.

Consequently, consumers globally are having to drastically change their spending habits. In the UK and US, pullbacks aren't limited to discretionary categories, either, with the likes of clothing impacted. So how might sustainable fashion—an industry whose consumption was broadly deemed 'expensive' even before today's inflationary strains—be affected?



*We ask: As the cost of living crisis deepens, is sustainable fashion sustainable?*

We turn to consumers to investigate this topic and unravel the key findings of the research throughout this analysis. You can find the comprehensive **data** at the end of this report.



Shifts in  
consumer  
sentiments  
around  
sustainability  
within the  
fashion  
industry

# 1. Price takes priority over sustainability as cost of living soars



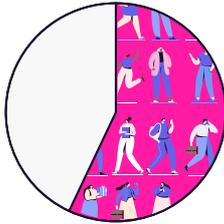
First and foremost, the research shows that most people (57%) do still want the fashion industry to become more sustainable. However, 61% say they're more concerned about price as the cost of living crisis continues, with even those in high-income groups likely to agree.

In addition, more than half (55%) agree that sustainable fashion products are too expensive, and those in the highest income groups are most likely to agree.

Fewer than half the respondents (39%) say they'd pay more for sustainably-made versions of the same fashion item. And even of those who claim they want the fashion industry to be more sustainable, only 52% say they would be willing to.

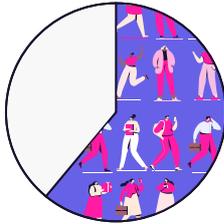
While there's demand for greater sustainability within fashion, might retailers need to offer more accessibility to enable consumers to continue embracing it—especially given the cost of living crisis is only worsening?

TOTAL UK + NA POPULATION  
667.5 MILLION



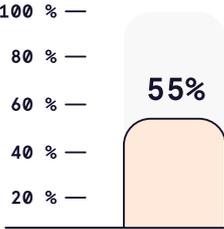
380.5  
MILLION

57% want the fashion industry to become more sustainable

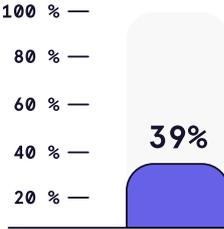


407  
MILLION

61% are more concerned about price



55% agree that sustainable fashion products are too expensive



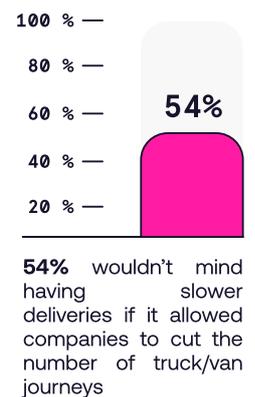
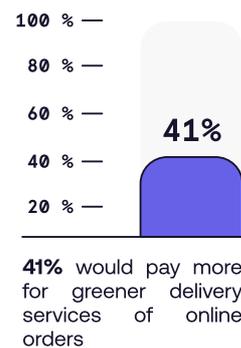
39% would pay more for sustainably-made versions of the same fashion item

## 2. Shoppers are now willing to wait longer to allow for greener deliveries

One example of how retailers can enable consumers to support fashion sustainability without coming at a monetary cost is around delivery services, which the research suggests there's opportunity within.

For instance, the research found that 41% say they'd pay more for greener delivery services of online orders. However, the majority (54%) say they wouldn't mind having slower deliveries if it allowed companies to cut the number of truck/van journeys (and reduce carbon emissions).

It is promising to see consumers' willingness to delay product deliveries for the sake of sustainability, given how expectations in recent years have increasingly demanded exceptionally fast fulfillment from the fashion industry.



### 3. Consumers don't want to pay for returns but are receptive to other ways of preventing them

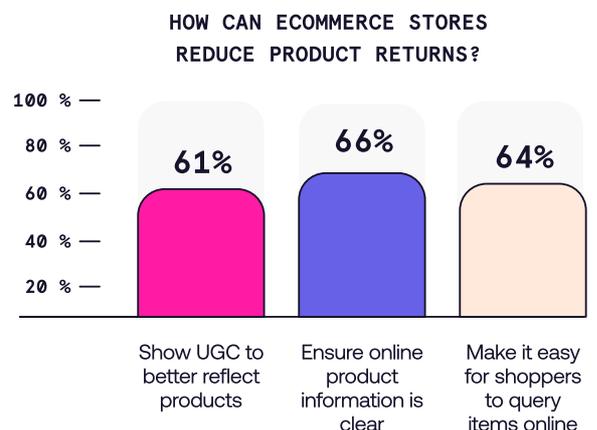
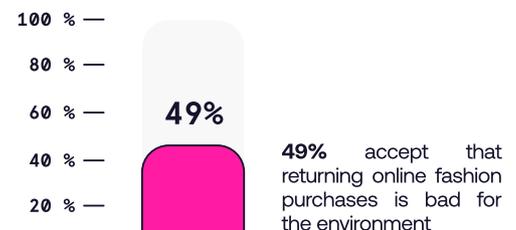


An even greater environmental strain than deliveries—and one of fashion's biggest concerns right now—is the returns crisis. Return rates are heavily costing retailers as well as the environment. Many fashion brands such as Uniqlo and Zara have begun charging customers for them in an attempt to prevent them.

When questioning consumers specifically on their beliefs of how fashion returns could be prevented, unsurprisingly, the research showed that charging shoppers for returns was the least popular option, with fewer than half the respondents supporting it.

However, 49% did accept that returning online fashion purchases is bad for the environment, and showed good receptivity to other ideas of how to prevent returns that don't involve a cost. These included: showing user-generated content (UGC) to better reflect products; ensuring online product information is clear; and making it easy for shoppers to query items online such as through live chats.

Each of the above was deemed a feasible way of reducing returns by over 60% of respondents, highlighting the opportunity to tackle the returns crisis without risking sales (as charging consumers for these most likely would).



# 4. People want to keep clothing longer, but don't think retailers facilitate this



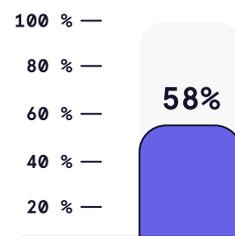
Another interesting area of the research was around consumers' opinions on garments' longevity. In recent years, the rise of throwaway fashion has become an enormous strain on the environment, with so many shoppers buying outfits that are worn just once.

The research revealed, however, that 58% of today's consumers actually try to keep clothes for longer to help the environment, though 54% believe they aren't built to last.

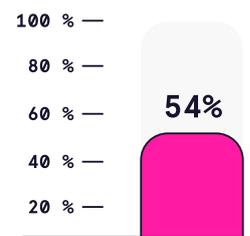
This seems to have sparked a demand for the likes of repair services, too.

Forty-two percent of respondents say they've had to throw clothes as a result of not being able to get them repaired, and 60% say they believe that offering repair services will make fashion more sustainable.

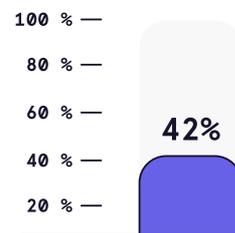
Is there a gap for more retailers to create or push aftercare services more heavily, such as how Selfridges recently pledged to? Will the industry figure out a way to solve the current drawbacks associated with offering repair services, such as the ability to do so at scale?



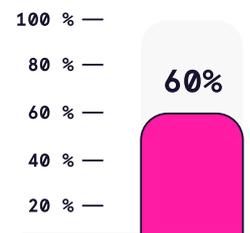
58% try to keep clothes for longer to help the environment'



54% believe they aren't built to last



42% have had to throw clothes as a result of not being able to get them repaired

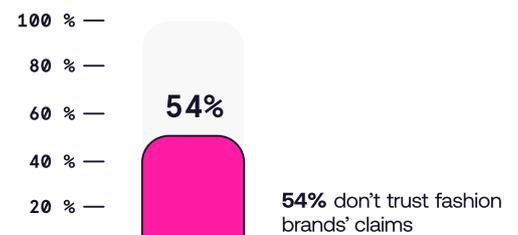


60% believe that offering repair services will make fashion more sustainable

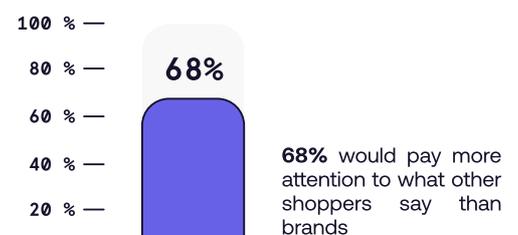
# 5. Broken confidence in brands' sustainability claims is causing consumers to rely on other shoppers for guidance

With fashion's sustainability claims under scrutiny, and even well-known brands under investigation for greenwashing, it is unsurprising that consumer trust has dwindled in recent years.

The research confirmed that most people (54%) say they don't trust the claims that fashion brands make about their commitment to sustainability. Interestingly, of those who want fashion to be more sustainable, 68% say they'd pay more attention to what other shoppers say than the brands.



Consumer skepticism remains, and people want proof before buying into sustainable fashion. With shoppers more trusting of other consumers, perhaps brands could leverage consumer social proof as a way of allaying shopper doubt.



# 6. Consumers need more clarity on which products are sustainable

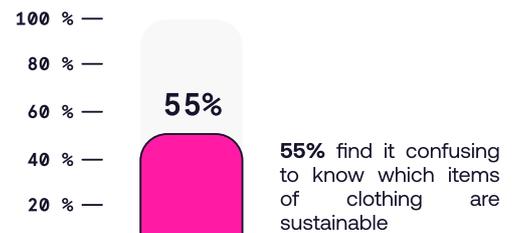


What can't be helping consumer doubt is a lack of clarity over what actually is sustainable—something else the research brought to light.

It showed that most people (55%) say they find it confusing to know which items of clothing are sustainable when shopping, and even of those who want the industry to improve—and most likely have a better idea of what to look for—68% say they can't identify whether or not an item is sustainable.

The challenge for brands is that sustainability covers many complex issues, from how and where individual raw materials are sourced, to manufacturing processes and how garments are packaged and transported. They can't simply label goods as 'sustainable' without being sure of every link in the chain. Plus, they rightly have concerns about the danger of misleading consumers.

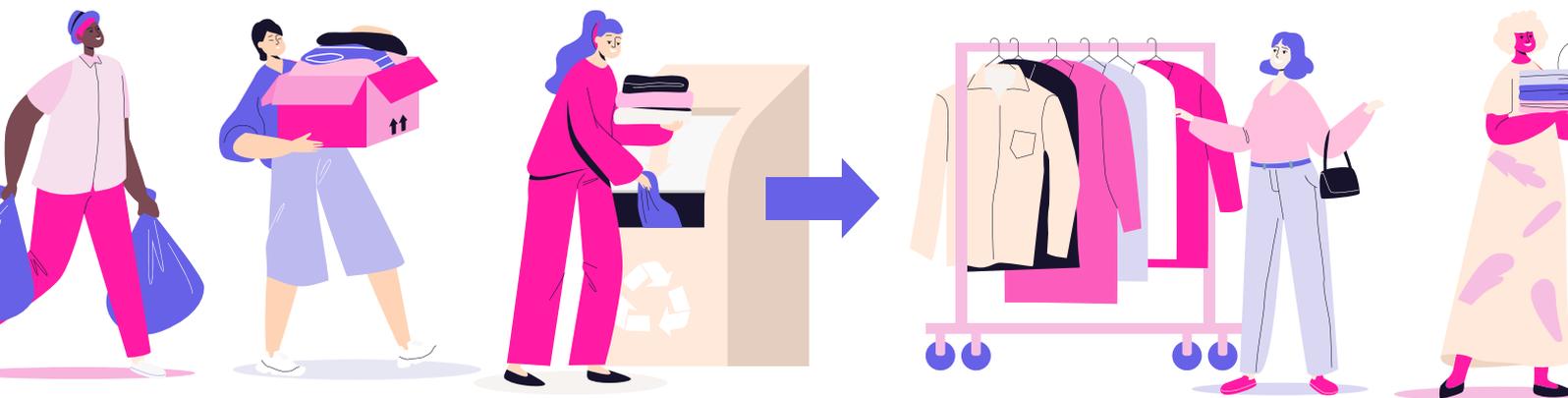
How can brands look to be clearer in communicating which products in their catalogs are sustainable, and perhaps be more specific on which elements are, in helping consumers identify these?



# Conclusion

Overall, the cost of living crisis has exacerbated the financial barriers to supporting sustainable fashion. It is clear that, to allow consumers to embrace sustainable fashion as the planet demands, retailers must offer greater affordability and availability of relevant options—especially as the cost of living crisis prevails.

Consumers do want the fashion industry to become more sustainable, and while they are looking to businesses to make it so, they are also willing to take responsibility, should relevant options be accessible.



# Key takeaways

From the key findings of the research, here are the actions fashion retailers can take and prioritize in response to these shifts in consumer demand around sustainable fashion.



# 1

As a means of enabling greener deliveries, retailers should offer customers more options that require a longer delivery time, as opposed to requiring a greater cost.

# 2

Rather than charging for ecommerce returns, brands should prioritize ways of preventing them that don't come at a monetary cost to the customer, such as:

- showing UGC on their ecommerce stores to better reflect products in reality, on everyday people
- ensuring online product information is clear so as to help shoppers learn more about an item before its arrival
- making it easy for shoppers to ask questions about items online such as through live chats to gain more information before purchasing

# 3

To enable customers to keep items for longer, retailers should introduce garment repair services, or better signpost existing ones to ensure consumers are aware of their availability.

# Key takeaways

## 4

In building credibility around their sustainability claims, brands should look to leverage UGC within the product or category pages of sustainable garments, so as to alleviate doubt and provide validation.

## 5

Brands making sustainability claims should also look towards other methods of building relationships with consumers given the broader consumer doubt, such as by offering loyalty programs.

## 6

To be clearer on what specific products are and aren't sustainable, brands should consider merchandising their products using clear sustainability categories. They should also look to use the likes of content badges and other trust signals to highlight garments' specific sustainability details.



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[Full research data](#)

