

CHAIR

institut
FRANÇAIS
de la MÔDE

PREMIÈRE**VISION**

The true picture of sustainable fashion consumption behaviors

4th July 2023

CHAIR

institut
FRANÇAIS
de la MÓDE

PREMIÈRE**ViSiON**

- Sustainable fashion: consumer perception
- The importance of material
- Sustainable fashion purchasing
- Conclusion

CHAIR

institut
FRANÇAIS
de la MÓDE

PREMIÈRE**VISION**

- Sustainable fashion: consumer perception
- The importance of material
- Sustainable fashion purchasing
- Conclusion

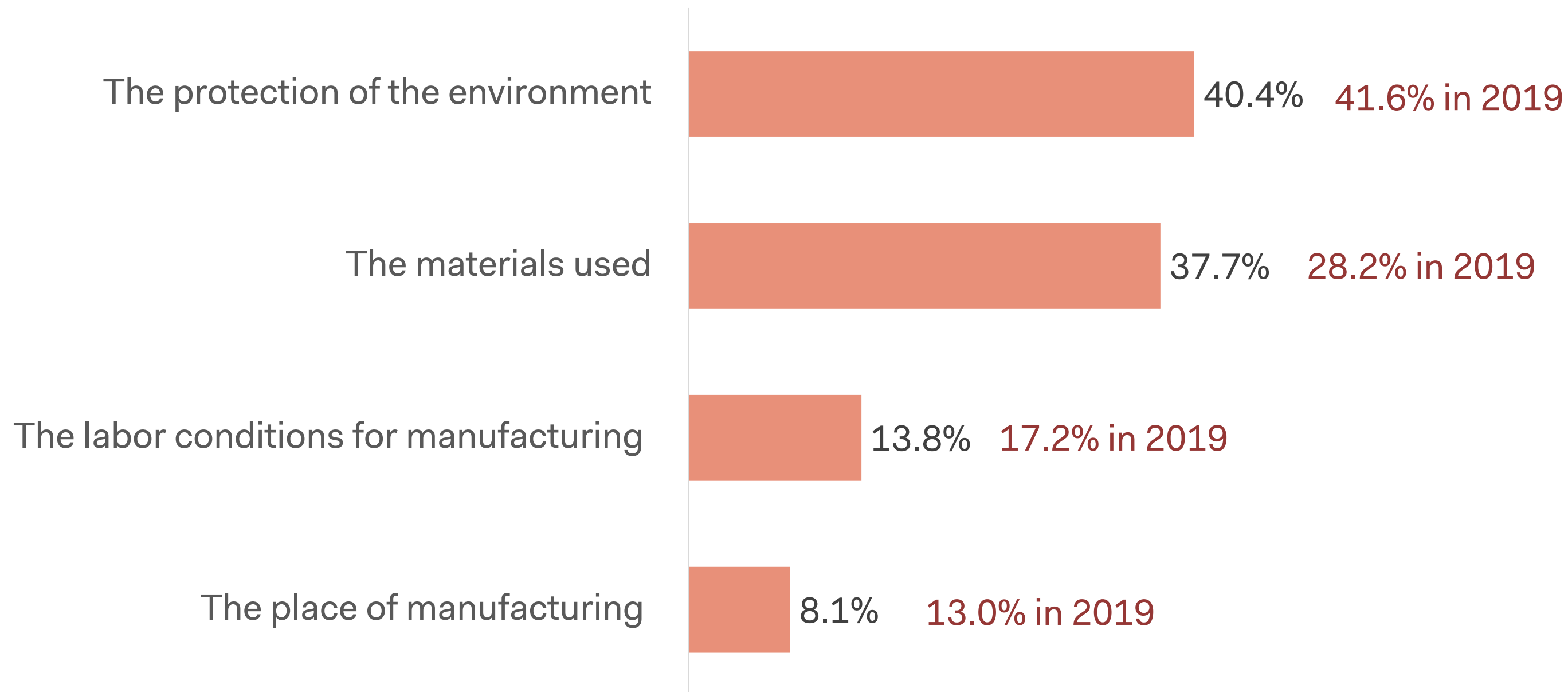
Fashion is becoming more and more "sustainable"

What, in your opinion, defines a "sustainable" fashion item?

(Only 1 answer)

The importance of the material is growing:
it is the # 1 requirement in Germany, Italy and USA

France:



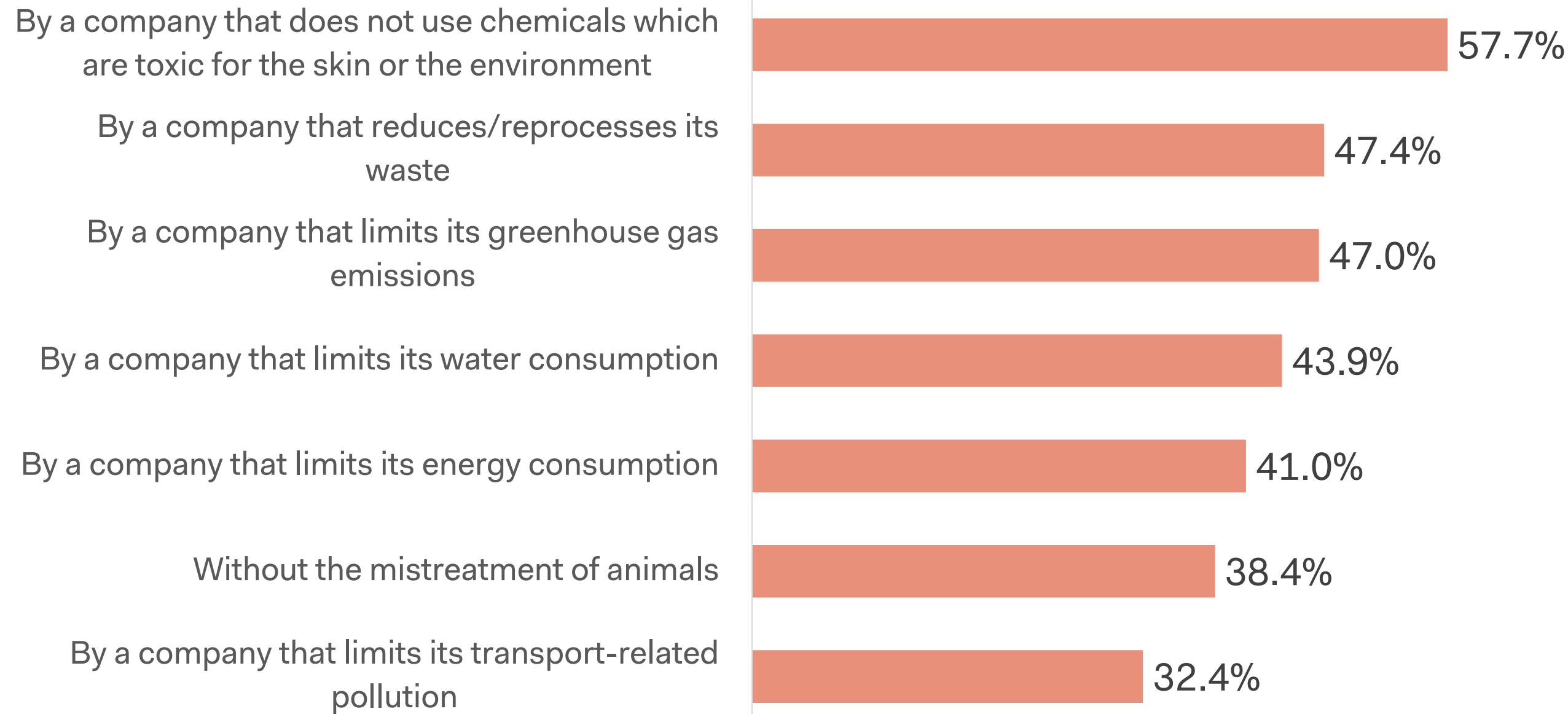
	Germany	Italy	United Kingdom	United States
The protection of the environment	29.8%	40.6%	50.1%	37.2%
The materials used	37.6%	46.7%	34.6%	46.7%
The labor conditions for manufacturing	23.4%	8.6%	9.4%	8.0%
The place of manufacturing	9.3%	4.1%	5.9%	8.1%

In your opinion, for a fashion product to be "sustainable", it should be manufactured:

(1 to 4 possible answers)

France:

The protection of the environment



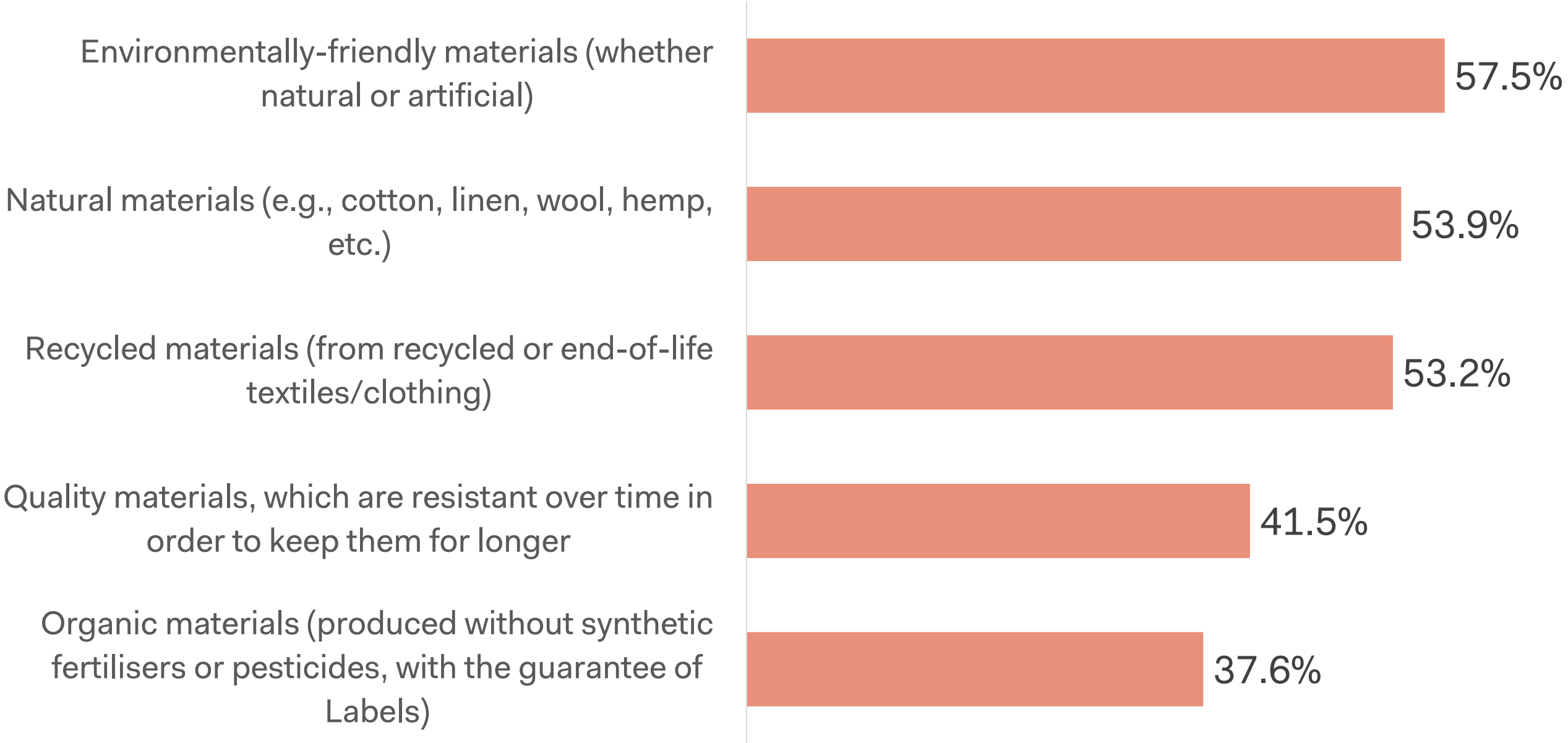
Germany	Italy	United Kingdom	United States
63.0%	60.5%	52.0%	55.1%
48.5%	56.1%	56.8%	50.1%
37.1%	51.8%	53.9%	45.5%
44.1%	38.7%	38.5%	29.0%
41.8%	42.3%	46.4%	36.9%
53.0%	36.7%	39.4%	37.8%
29.5%	31.9%	38.4%	41.5%

What in your opinion, in order to be sustainable, a fashion item should be made from?

(1 to 3 possible answers)

France:

The material used



Recycled materials are making progress. There are even #1 in Italy and UK

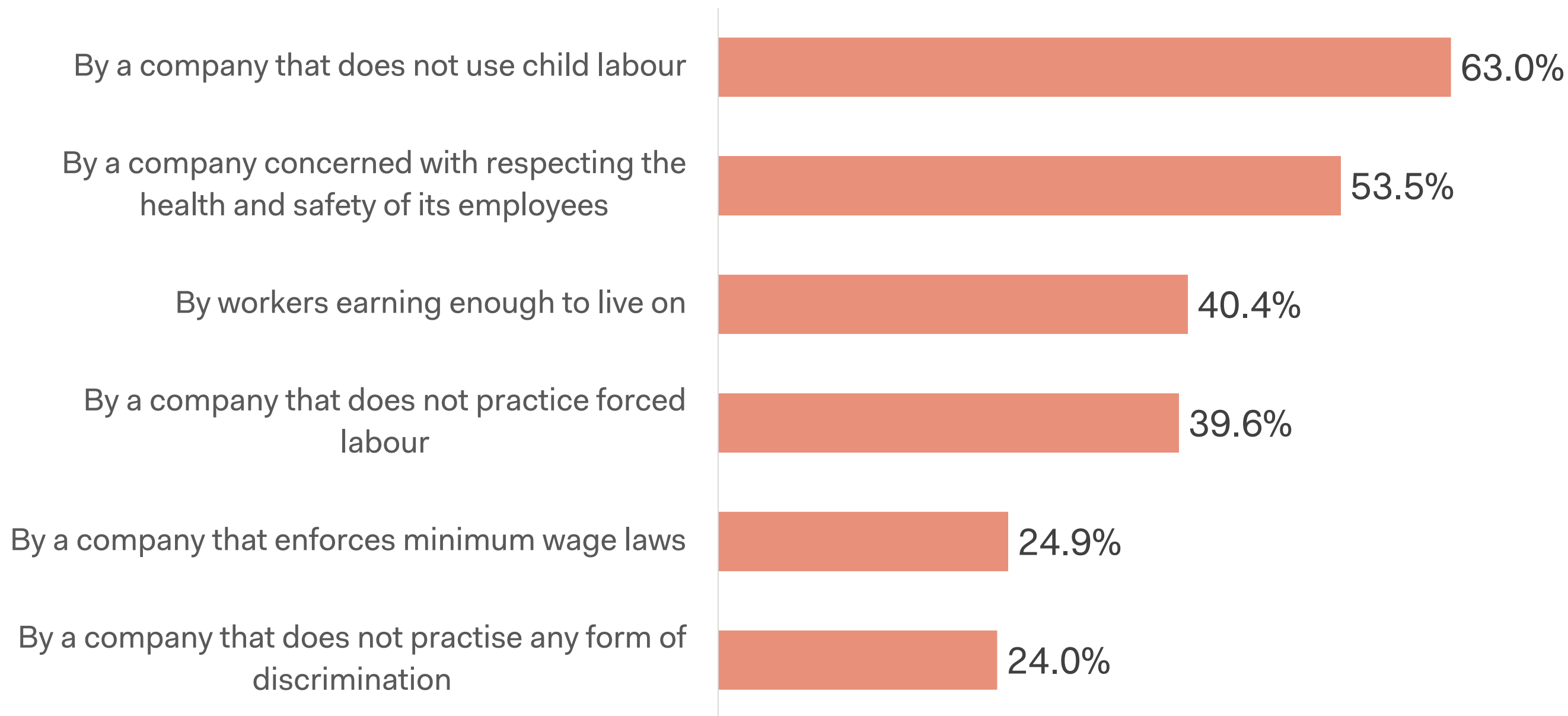
	Germany	Italy	United Kingdom	United States
Environmentally-friendly materials (whether natural or artificial)	45.6%	47.3%	53.6%	50.8%
Natural materials (e.g., cotton, linen, wool, hemp, etc.)	58.2%	57.9%	52.0%	51.5%
Recycled materials (from recycled or end-of-life textiles/clothing)	51.0%	59.0%	61.9%	51.4%
Quality materials, which are resistant over time in order to keep them for longer	48.1%	38.6%	45.8%	40.9%
Organic materials (produced without synthetic fertilisers or pesticides, with the guarantee of Labels)	41.4%	44.8%	38.5%	44.7%

In your opinion, for a fashion product to be "sustainable", it should be manufactured:

(1 to 3 possible answers)

France:

The labor conditions



Strong support against child labor

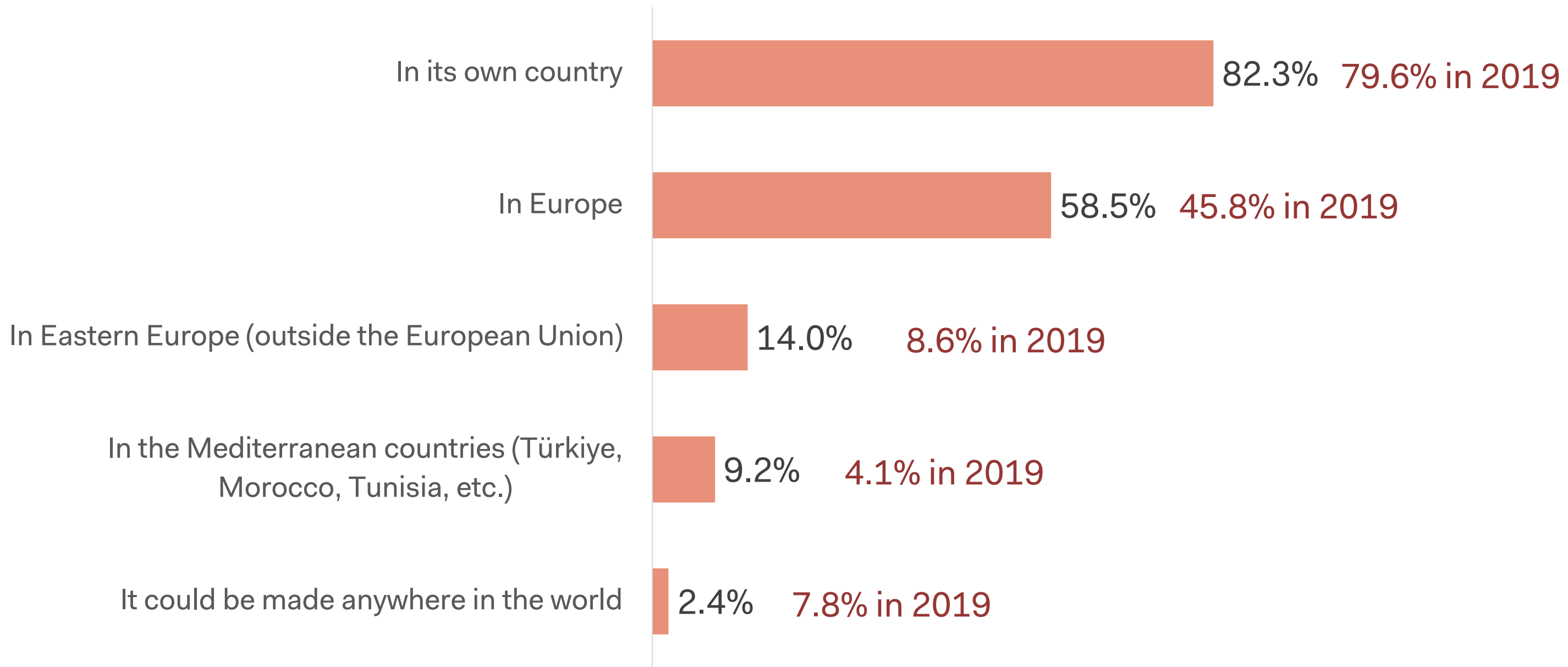
Germany	Italy	United Kingdom	United States
62.5%	58.0%	60.4%	46.4%
44.9%	58.2%	51.9%	58.6%
41.2%	34.3%	43.0%	38.3%
48.5%	36.5%	48.0%	39.7%
31.1%	26.8%	29.1%	25.4%
26.1%	32.6%	23.7%	28.1%

In your opinion, for a fashion product to be "sustainable", it can be manufactured:

(1 to 3 possible answers)

France:

The place of manufacturing



Euromed zone gets stronger

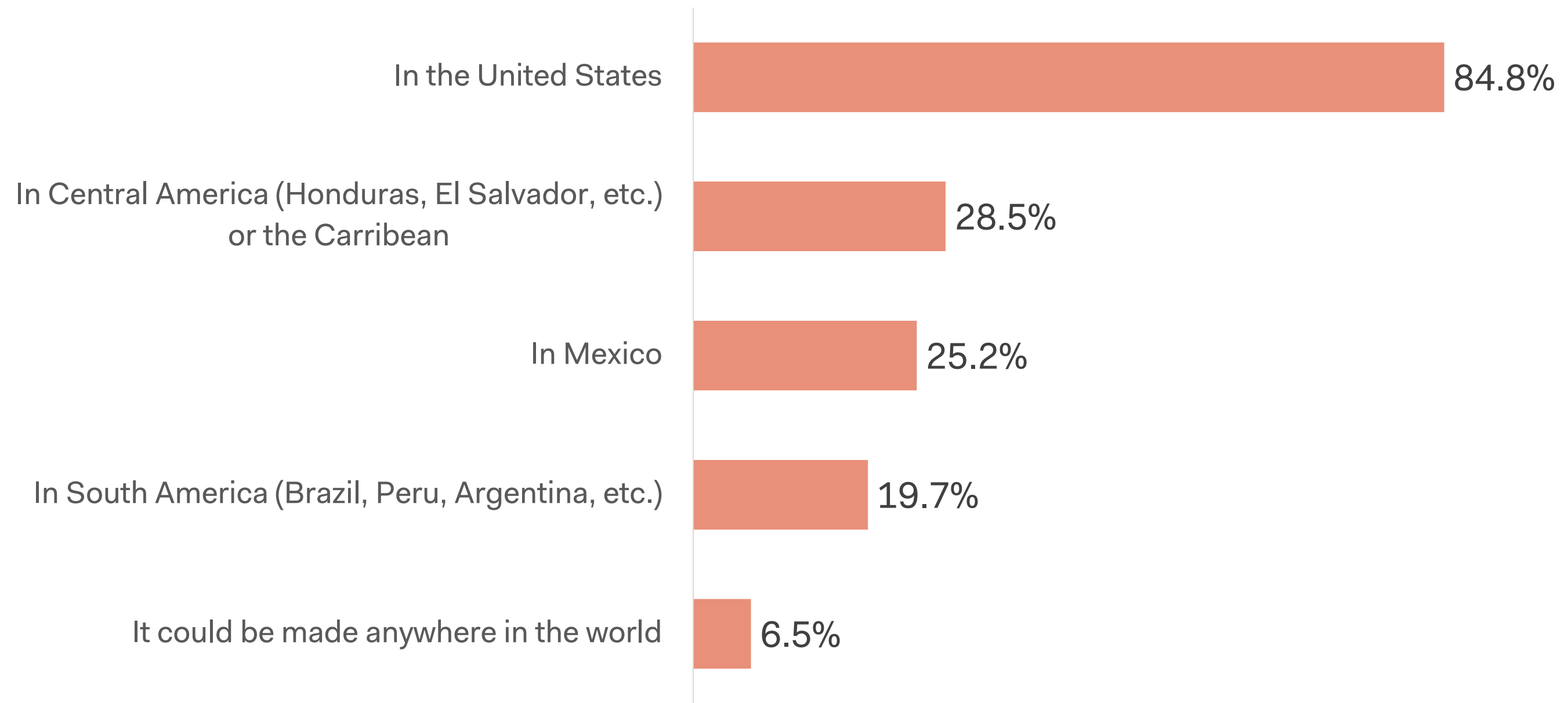
	Germany	Italy	United Kingdom
In its own country	81.0%	79.0%	78.4%
In Europe	69.2%	57.9%	56.7%
In Eastern Europe (outside the European Union)	22.7%	15.2%	25.6%
In the Mediterranean countries (Türkiye, Morocco, Tunisia, etc.)	11.5%	8.9%	16.6%
It could be made anywhere in the world	4.7%	5.3%	8.1%

In your opinion, for a fashion product to be "sustainable", it can be manufactured:

(1 to 3 possible answers)

United States:

The place of manufacturing



The true picture of sustainable fashion consumption behaviors

CHAIR

institut
FRANÇAIS
de la MÓDE

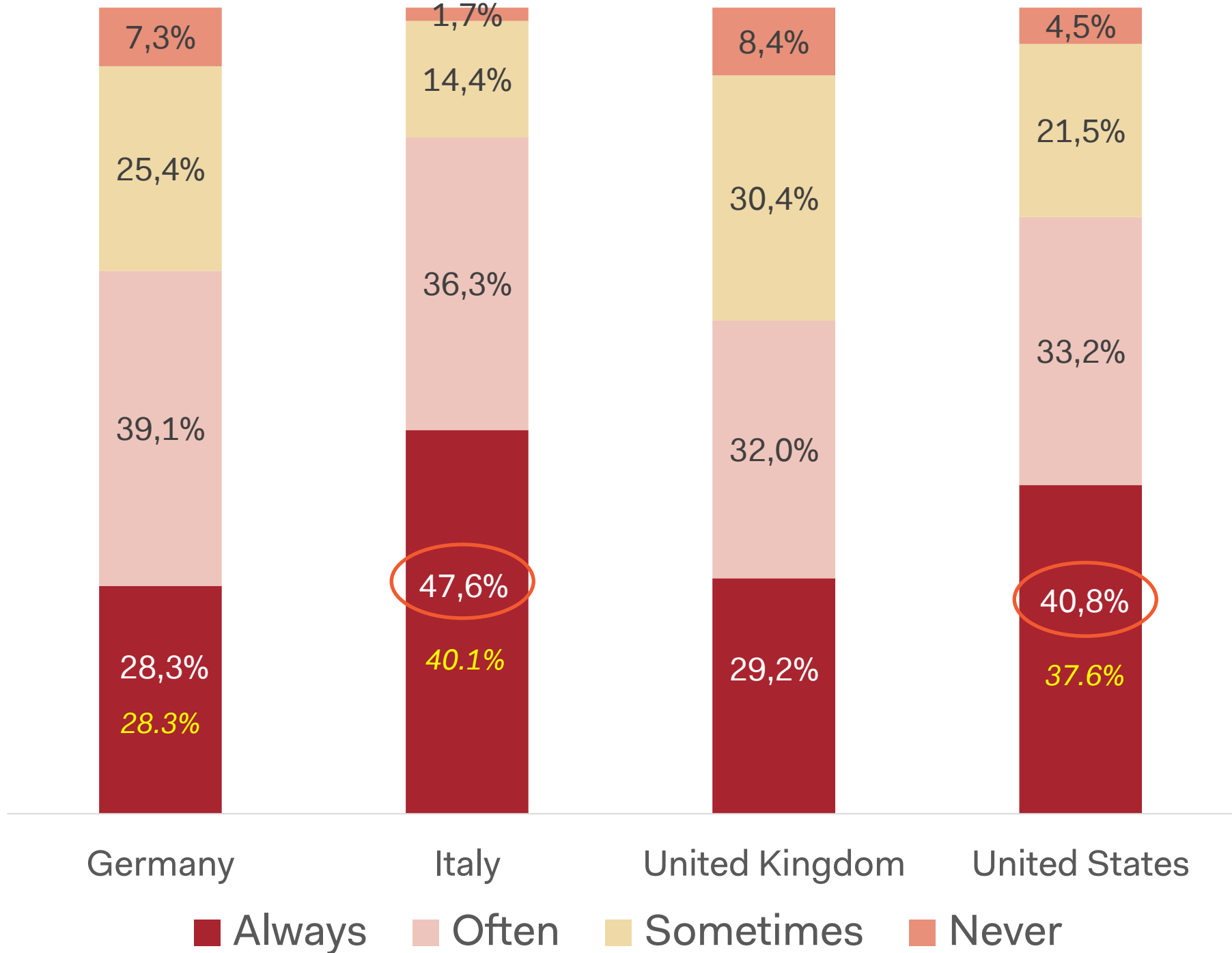
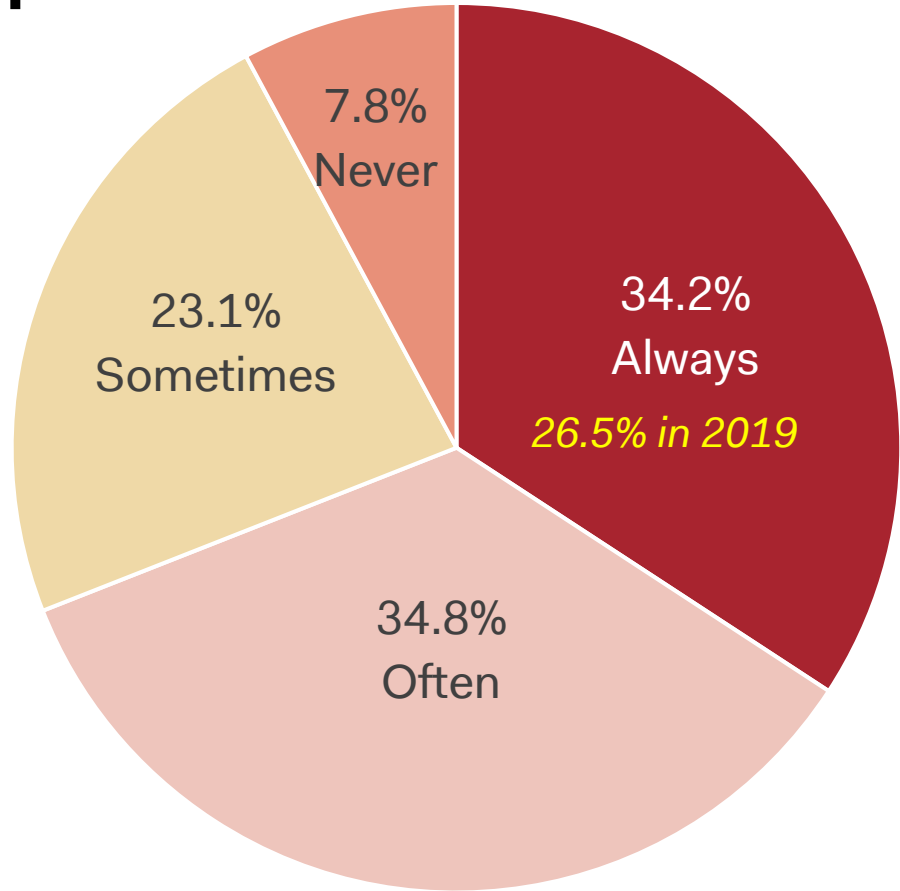
PREMIÈRE**ViSiON**

- Sustainable fashion: consumer perception
- **The importance of material**
- Sustainable fashion purchasing
- Conclusion

When you buy a fashion item, do you look at the label indicating the composition of the fabric?

(Clothing, lingerie/underwear, shoes, leather goods.)

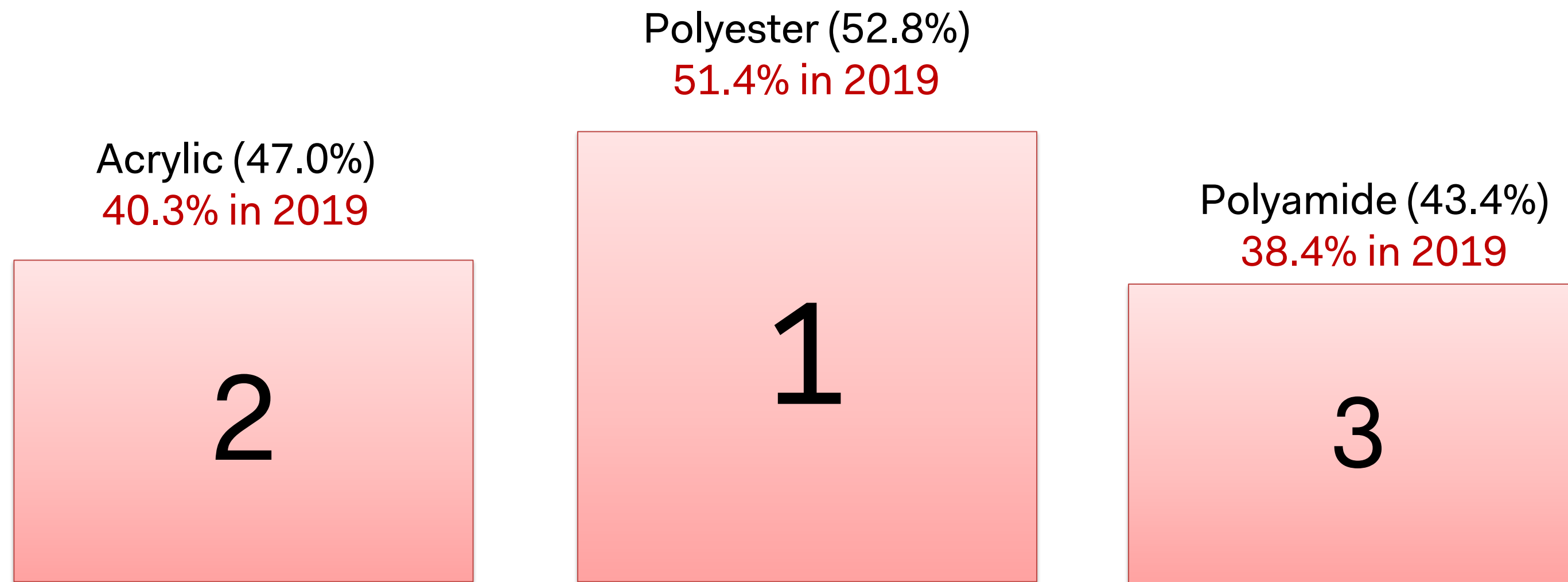
France:



Which of these materials, do you think has the most negative impact during its production?

(Top 3 most harmful materials for the environment)

France:



Which of these materials, do you think has the most negative impact during its production?

(1 to 3 answers possible)

France	Germany	Italy	United Kingdom	United States
1. Polyester (52.8%)	1. Polyester (53.5%)	1. Polyester (59.5%)	1. Polyester (51.9%)	1. Acrylic (43.0%)
2. Acrylic (47.0%)	2. Polyamide (47.3%)	2. Acrylic (52.5%)	2. Acrylic (45.4%)	2. Polyester (41.9%)
3. Polyamide (43.4%)	3. Acrylic (47.2%)	3. Polyamide (47.6%)	3. Polyamide (42.6%)	3. Polyamide (40.5%)
4. Viscose (25.4%)	4. Viscose (23.2%)	4. Viscose (24.3%)	4. Viscose (28.4%)	4. Viscose (20.5%)
5. Leather (17.4%)	5. Leather (18.1%)	5. Leather (22.6%)	5. Leather (19.1%)	5. Leather (19.8%)
6. Cotton (20.1%)	6. Cotton (16.5%)	6. Cotton (11.0%)	6. Cotton (14.6%)	6. Silk (16.7%)
7. Silk (11.4%)	7. Silk (11.9%)	7. Wool (10.9%)	7. Silk (14.3%)	7. Wool (15.9%)
8. Wool (12.7%)	8. Cashmere (11.5%)	8. Silk (9.6%)	8. Cashmere (13.9%)	8. Hemp (15.2%)
9. Cashmere (11.2%)	9. Wool (11.1%)	9. Cashmere (9.2%)	9. Wool (11.9%)	9. Cotton (14.6%)
10. Hemp (10.2%)	10. Linen (9.5%)	10. Hemp (7.9%)	10. Linen (10.1%)	10. Cashmere (13.9%)
11. Linen (10.1%)	11. Hemp (9.1%)	11. Linen (7.8%)	11. Hemp (7.9%)	11. Linen (10.3%)

CHAIR

institut
FRANÇAIS
de la MÓDE

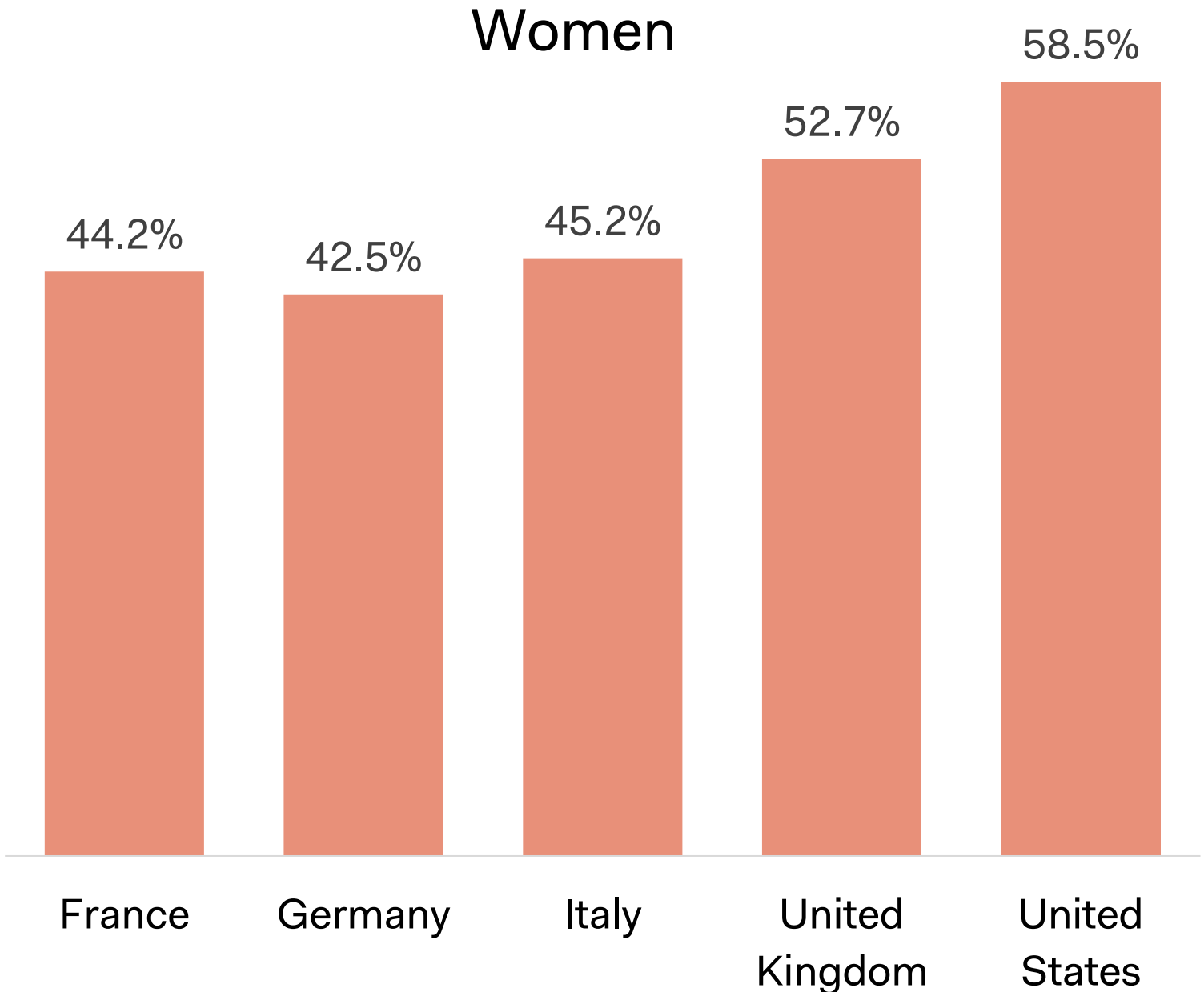
PREMIÈRE**ViSiON**

- Sustainable fashion: consumer perception
- The importance of material
- **Sustainable fashion purchasing**
- Conclusion

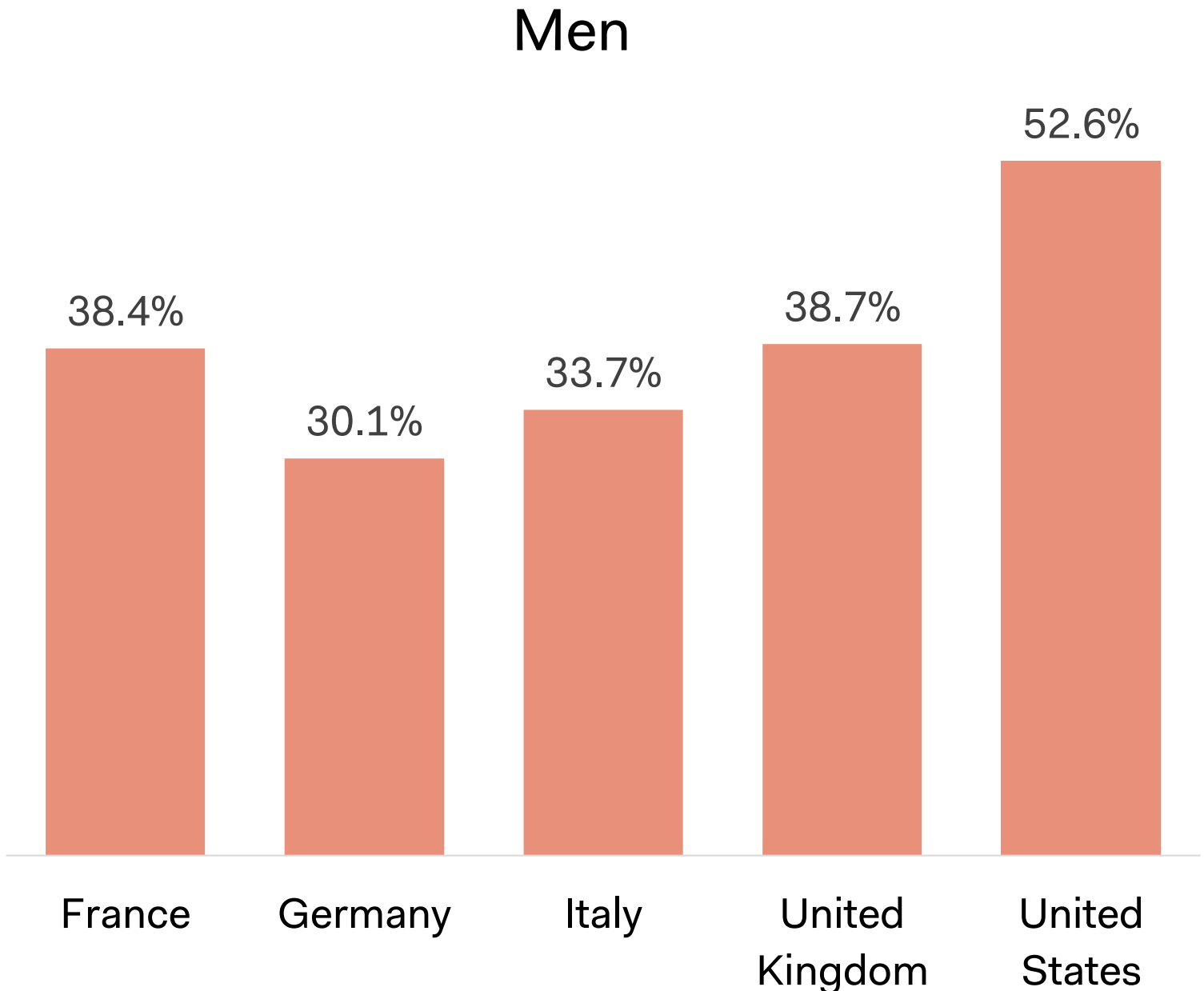
Did you buy second-hand clothing in 2022?

Share in% of "Yes"

Women



Men



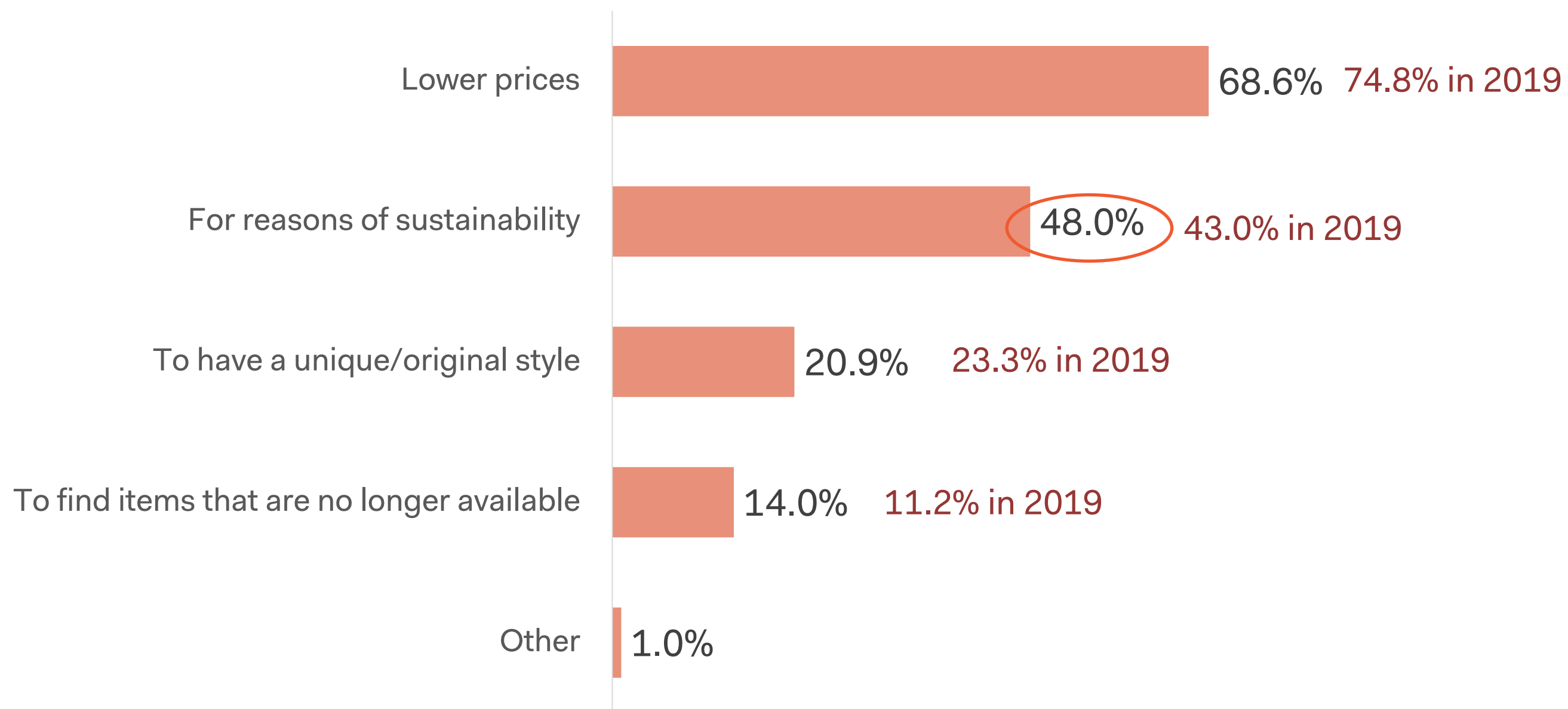
In 2019	France	Germany	Italy	United Kingdom	United States
	42.2%	38.2%	35.5%	NA	56.1%

In 2019	France	Germany	Italy	United Kingdom	United States
	34.5%	26.1%	32.6%	NA	49.7%

What was your main raison for buying second-hand clothing?

(1 to 2 possible answers)

France:



	Germany	Italy	United Kingdom	United States
Lower prices	64.0%	56.0%	60.1%	62.1%
For reasons of sustainability	44.2%	47.0%	46.8%	40.6%
To have a unique/original style	32.1%	25.6%	30.2%	43.9%
To find items that are no longer available	18.1%	19.1%	17.8%	15.9%
Other	0.7%	0.4%	1.5%	0.9%

Clothing durability: In 2022, did you...?

- Yes:

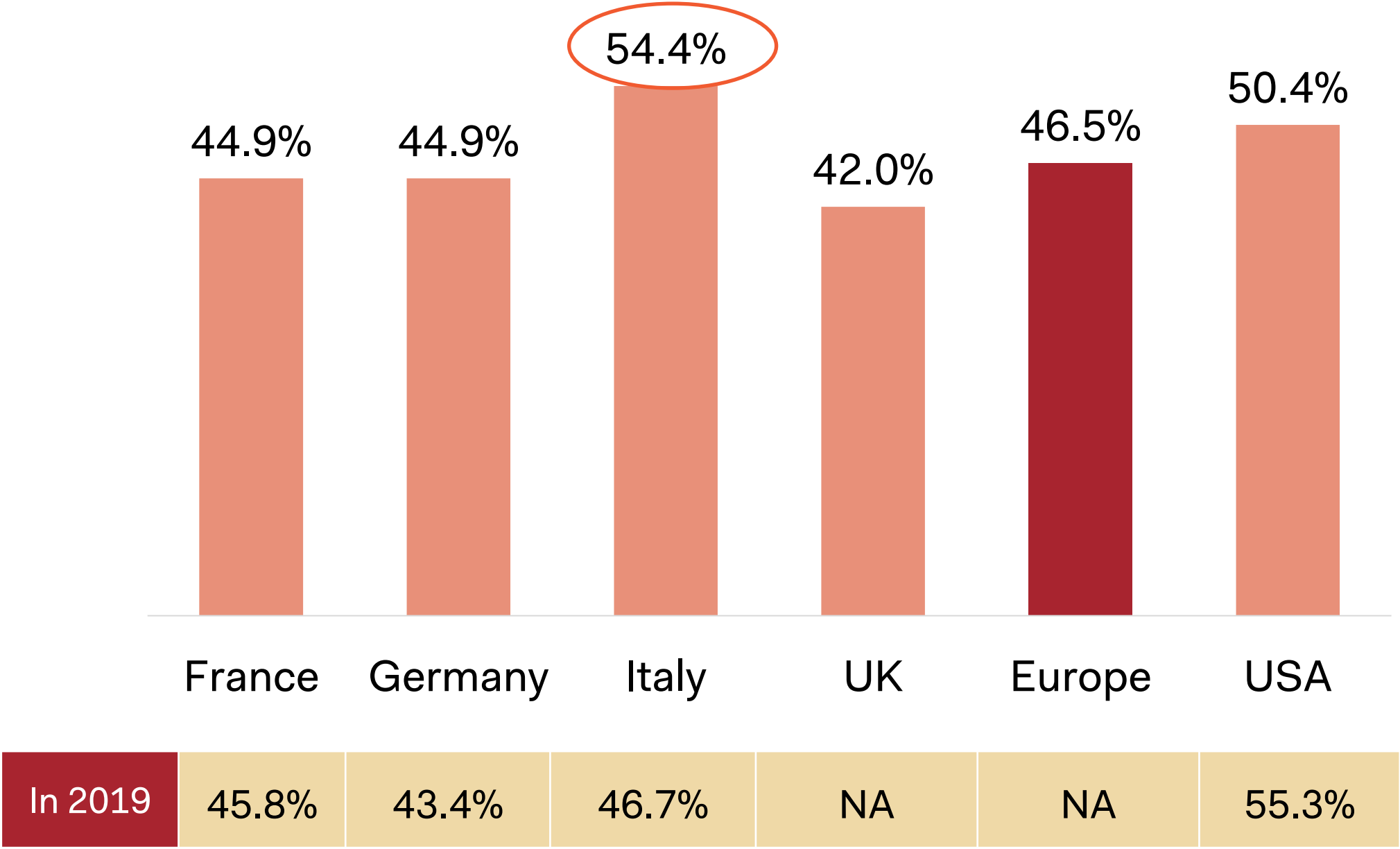
France:



Germany	Italy	United Kingdom	United States
46.7%	61.6%	72.2%	77.9%
74.5%	82.4%	59.9%	58.0%
46.7%	45.2%	46.0%	44.4%
27.8%	20.0%	18.6%	43.7%
26.3%	24.1%	29.0%	47.3%
27.1%	24.0%	21.1%	42.1%

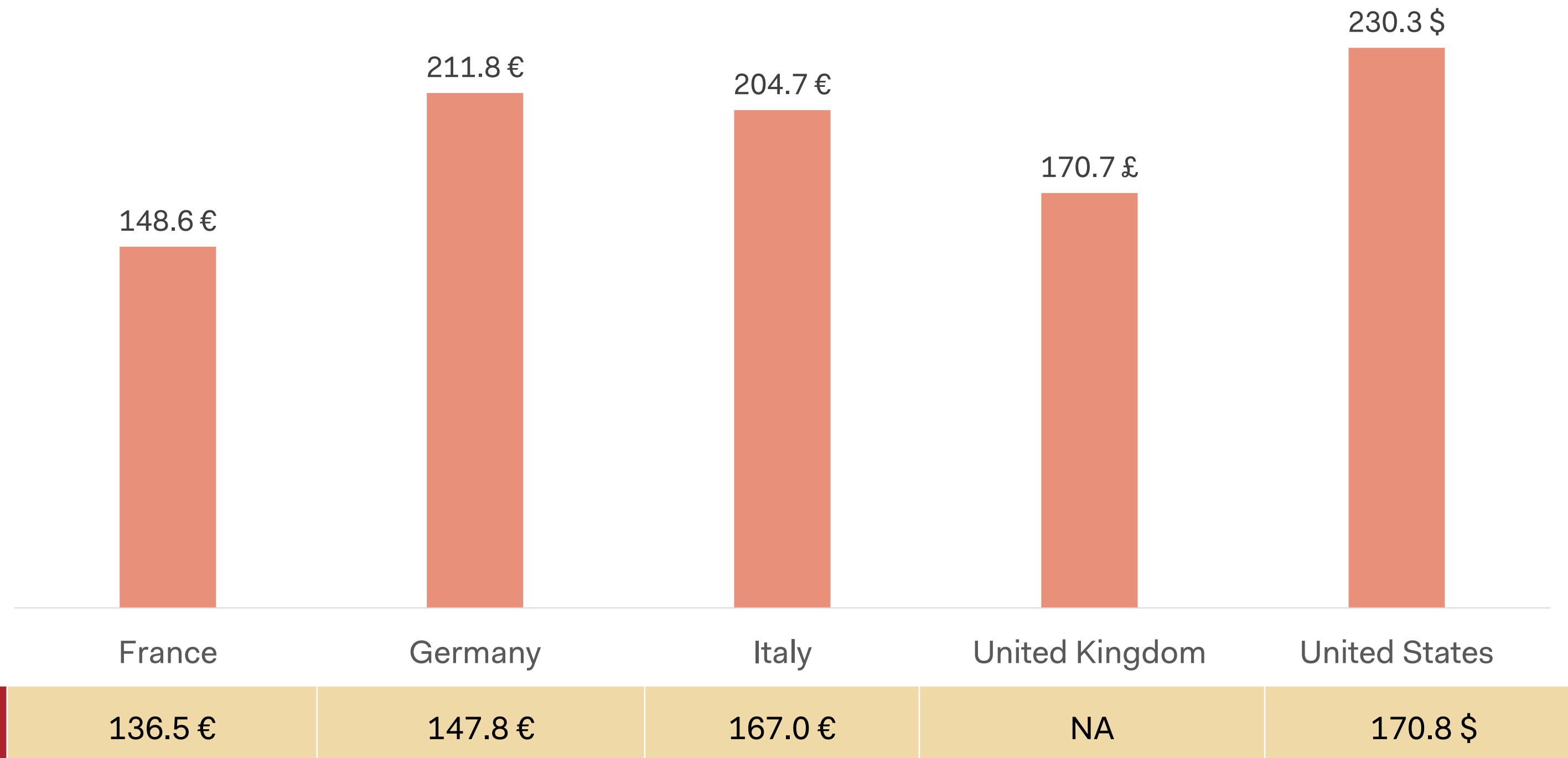
In 2022, did you buy any sustainable fashion items: (Example: recycled textile and/or organic materials, certified products and/or Made in the country, and/or second-hand items, etc.)?

Share in% of "Yes"



In 2022, what budget did you allocate to your sustainable fashion purchases? (Clothing, lingerie/underwear, shoes, leather goods.)

About a quarter of the fashion budget is spent on eco-responsible products



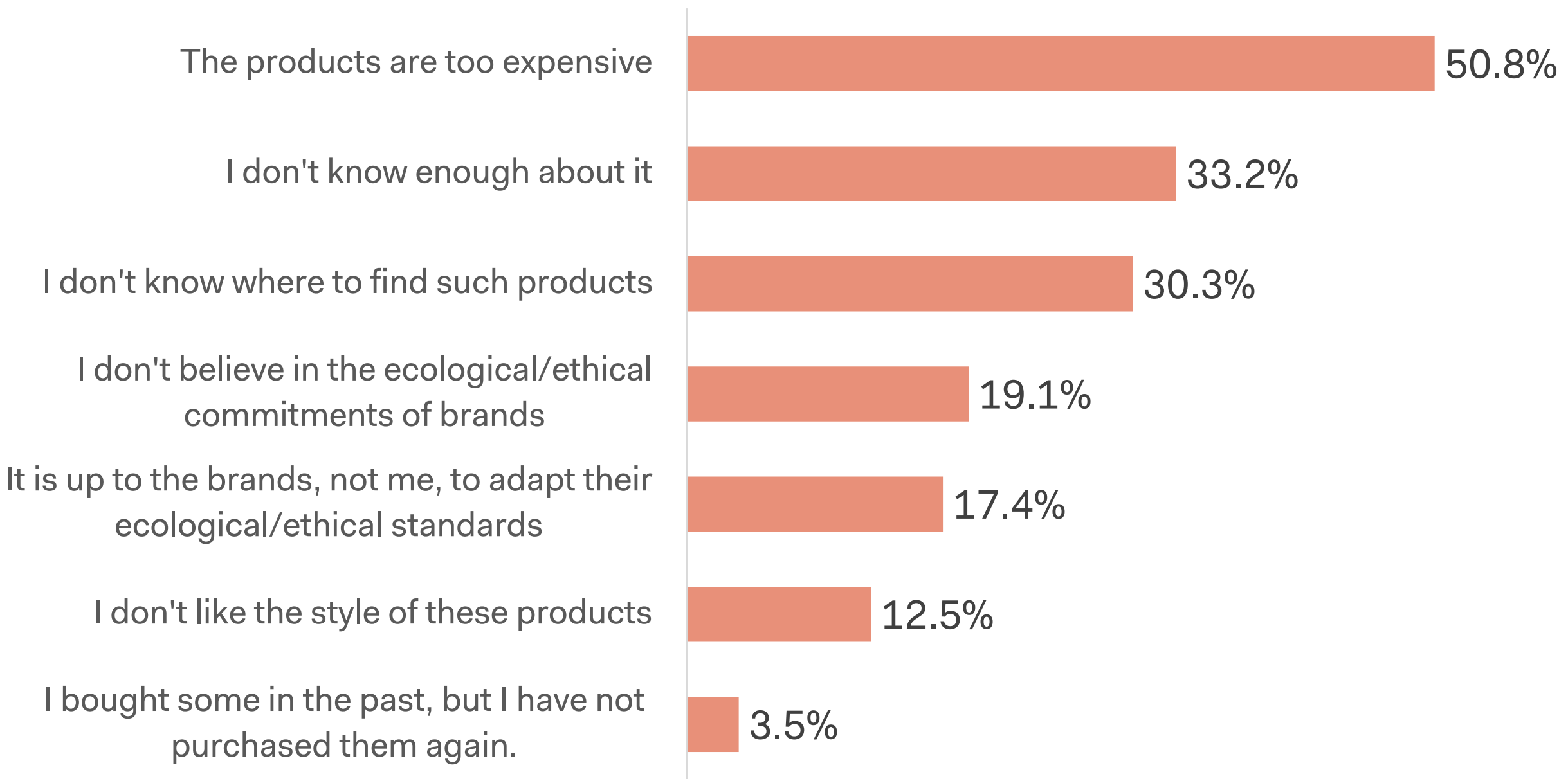
In 2022, you bought sustainable fashion items from which brands? (1 to 3 answers possible)

TOP 10:

France	Germany	Italy	United Kingdom	United States
1. Kiabi (11.1%)	1. Adidas (19.2%)	1. H&M (13.2%)	1. Marks & Spencer (18.4%)	1. Nike (27.8%)
2. H&M (9.2%)	2. Nike (17.4%)	2. Zara (12.9%)	2. Primark (14.4%)	2. Adidas (23.3%)
3. Patagonia (8.1%)	3. H&M (15.9%)	3. Ovs (11.5%)	3. H&M (12.5%)	3. Gucci (7.8%)
4. Nike (6.8%)	4. C&A (13.5%)	4. Timberland (11.2%)	4. Next (10.8%)	4. Patagonia (6.9%)
5. Adidas (6.2%)	5. Puma (6.3%)	5. Patagonia (9.8%)	5. Adidas (8.7%)	5. Zara (6.7%)
6. Zara (5.7%)	6. Tchibo (4.8%)	6. Adidas (8.0%)	6. Nike (8.7%)	6. Amazon (6.4%)
7. Vinted (5.1%)	7. Hess Natur (4.5%)	7. Nike (8.0%)	7. Patagonia (5.4%)	7. Puma (6.1%)
8. Decathlon (4.9%)	8. Zalando (4.2%)	8. Zalando (6.8%)	8. Zara (4.3%)	8. Levis (5.1%)
9. Lacoste (4.6%)	9. Boss (3.9%)	9. Benetton (6.8%)	9. Vinted (4.1%)	9. H&M (4.5%)
10. C&A (4.1%)	10. Esprit (3.6%)	10. Intimissimi (6.3%)	10. Gucci (4.1%)	10. Hanes (4.0%)

Why haven't you purchased any sustainable fashion product? (1 to 3 possible answers)

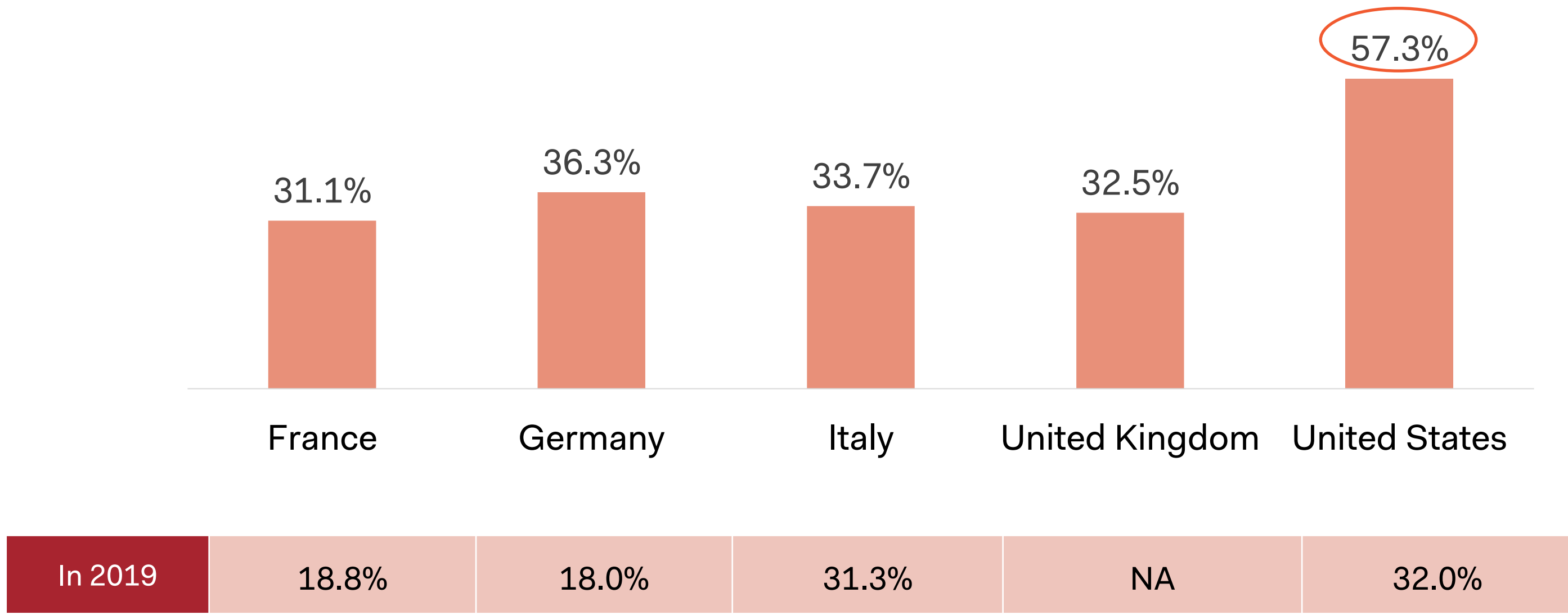
France:



	Germany	Italy	United Kingdom	United States
The products are too expensive	41.6%	29.5%	41.3%	38.7%
I don't know enough about it	35.4%	37.1%	40.4%	42.9%
I don't know where to find such products	28.2%	44.0%	41.1%	38.4%
I don't believe in the ecological/ethical commitments of brands	20.0%	12.9%	12.5%	11.0%
It is up to the brands, not me, to adapt their ecological/ethical standards	15.9%	17.5%	18.3%	21.9%
I don't like the style of these products	24.8%	14.7%	14.9%	15.2%
I bought some in the past, but I have not purchased them again.	7.7%	8.6%	7.4%	11.2%

In your opinion, do you have enough information about sustainable fashion?

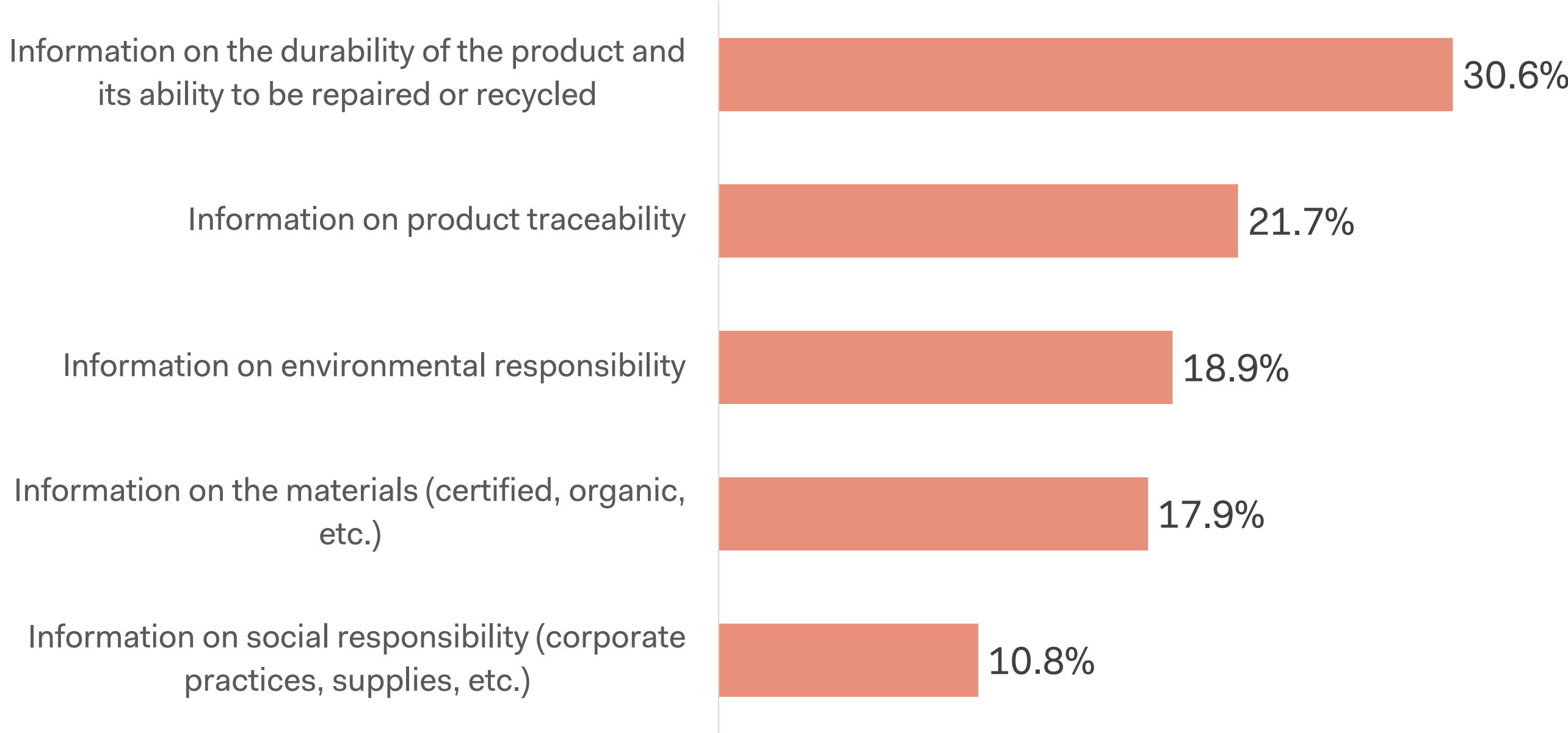
Share in% of "Yes"



What kind of information would you personally like to receive from a brand?

(Only 1 answer)

France:



	Germany	Italy	United Kingdom	United States
Information on the durability of the product and its ability to be repaired or recycled	27.2%	21.7%	26.8%	28.4%
Information on product traceability	14.3%	18.2%	9.1%	10.6%
Information on environmental responsibility	17.3%	25.0%	28.5%	23.1%
Information on the materials (certified, organic, etc.)	25.8%	23.6%	20.7%	23.7%
Information on social responsibility (corporate practices, supplies, etc.)	15.4%	11.4%	14.9%	14.2%

CHAIR

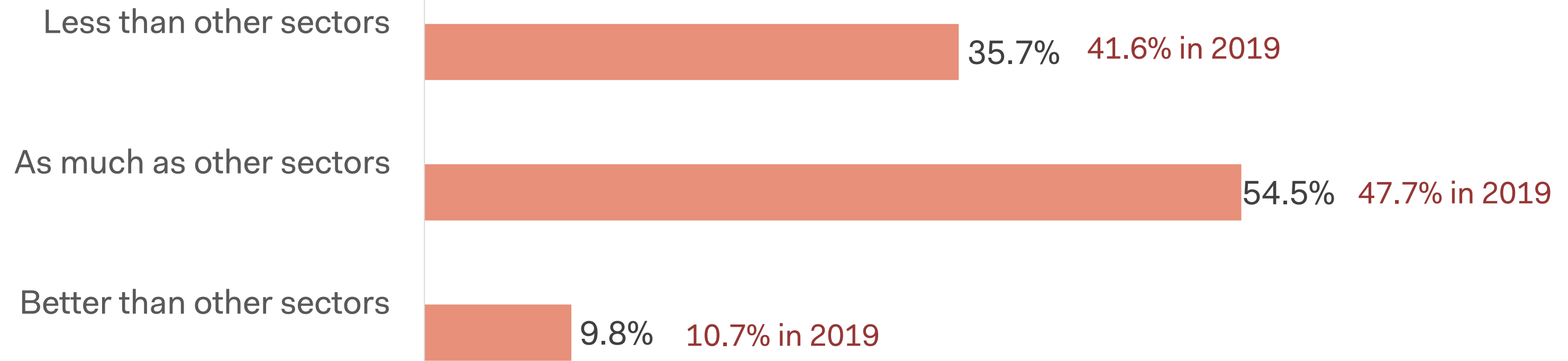
institut
FRANÇAIS
de la MÓDE

PREMIÈRE**VISION**

- Sustainable fashion: consumer perception
- The importance of material
- Sustainable fashion purchasing
- **Conclusion**

Do you think the fashion industry respects the criteria for being "sustainable"?

France:



	France	Germany	Italy	United Kingdom	United States
Less than other sectors	35.7%	32.2%	25.4%	32.5%	18.5%
As much as other sectors	54.5%	56.8%	60.0%	57.4%	55.9%
Better than other sectors	9.8%	11.0%	14.7%	10.1%	25.6%

A new law on the environmental labelling of clothing products (similar to the Nutri-Score in the food sector) will soon come into effect. Will this information impact your consumption habits?

France:



	France	Germany	Italy	United Kingdom	United States
It will not change my shopping in any way	42.0%	45.3%	27.9%	33.9%	44.8%
I will take this into account in order to consume more products with a lower environmental impact.	58.0%	54.7%	72.1%	66.1%	55.2%