

# WOVN

## Consumer views on Sustainability in Fashion 2021



# Sustainability in fashion post-COVID

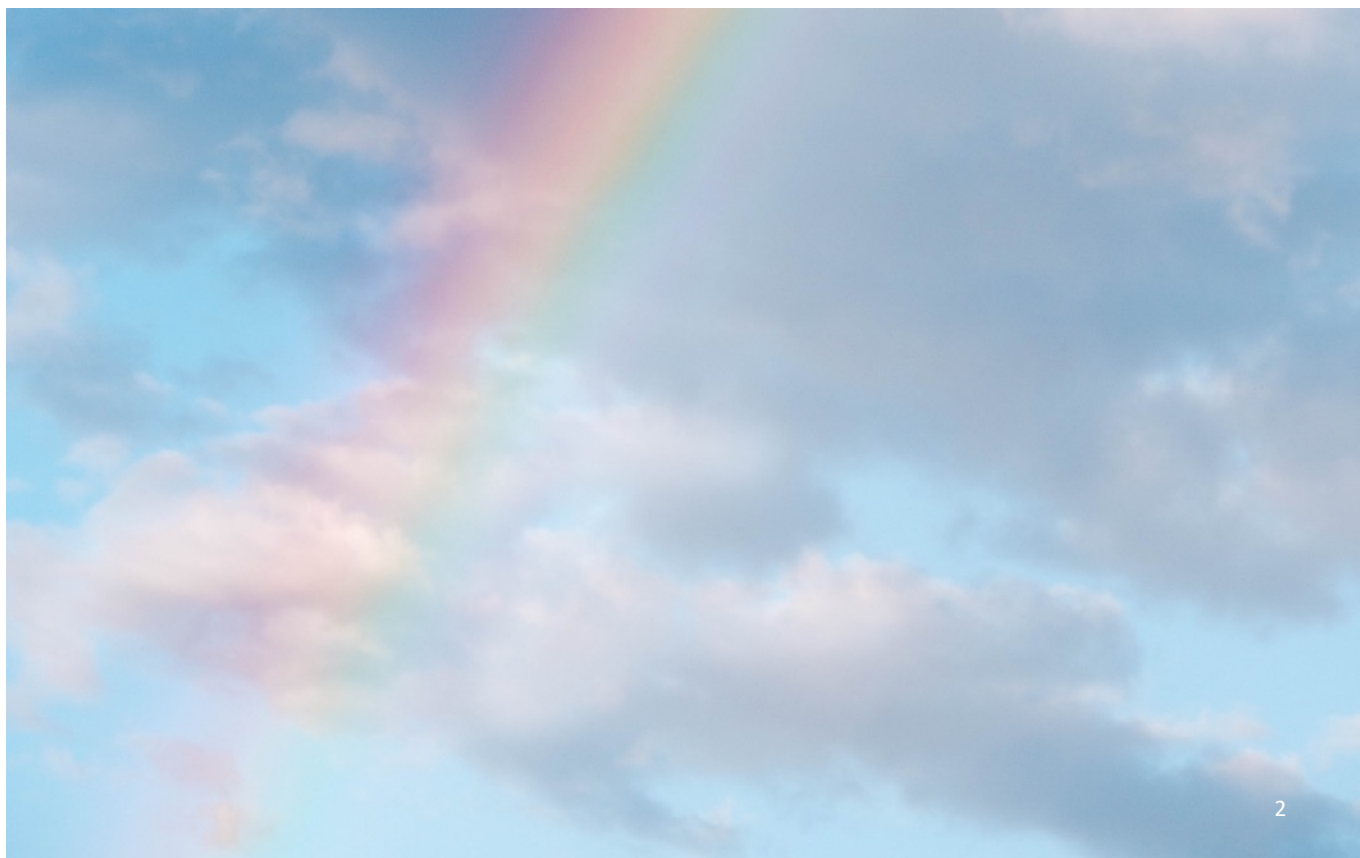
As the world haltingly emerges from nearly two years of pandemic-induced whiplash and turbulence, it's still unclear how the post-COVID future will take shape. One thing is certain: it will take years to fully understand the impacts of the pandemic across our way of life, economies, and industries. This includes the fashion industry, which arguably has undergone more turbulence than most.

Here's what hasn't changed in the \$2.7T dollar global fashion industry in the past two years: it still has a huge carbon footprint, and consumers are still increasingly concerned with the implications of that footprint. Not only is the industry responsible for up to 10% of global carbon emissions, but emissions are set to increase by a third over the next decade – to 2.7b tonnes a year by 2030<sup>(1)</sup>.

Our research shows that consumers are increasingly savvy about fashion's impact on the planet, and are spending more time thinking about the effects of their own consumption habits.

We surveyed over 500 consumers to gauge how they're currently thinking about sustainability in fashion, what changes they've made to their own behaviour and how they're assessing brands' sustainability efforts.

The results reveal that 96% of consumers think it's at least somewhat important that their fashion choices be sustainable, that they're aware of the impact that volume and overconsumption have on the environment, and that they expect more meaningful effort and transparency from brands when it comes to sustainability.



# Heightened awareness of fashion's impact

Awareness of the climate crisis continues to gain momentum. Climate-related natural disasters are sharply and noticeably on the rise<sup>(2)</sup>. A study from Imperial College London explores the myriad ways in which climate change is negatively impacting the mental health and wellbeing of people around the world<sup>(3)</sup>.

Consumers have never been more aware of climate change. That awareness extends to the fashion industry – an industry that we all, on some level, participate in. In general, COVID has had the effect of slowing down day to day life and enabling all of us to pause and contemplate our lifestyles and consumption habits. In the early months of the pandemic, searches for terms like “sustainable,” “ethical,” “Fair Trade” and “eco-friendly” clothing were up 84% compared to the previous year<sup>(4)</sup>.

## Three quarters of respondents reported making changes to their fashion shopping habits to reduce their environmental footprint.

The pandemic also laid bare uncomfortable aspects of the global fashion supply chain that many consumers previously may not have been aware of. As labour rights abuses in garment manufacturing made news over the past two years, consumers took notice<sup>(5)</sup>.

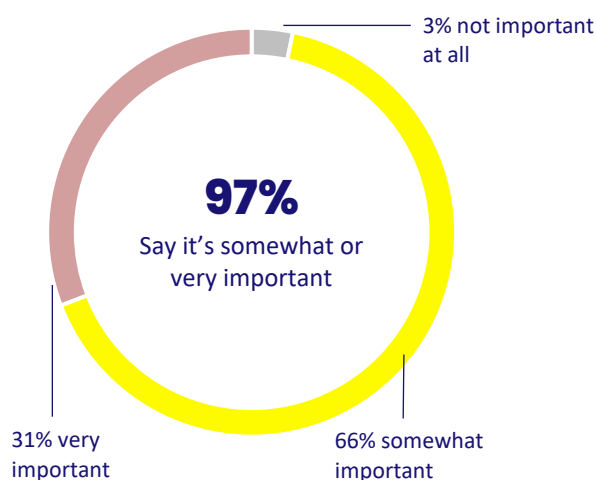
The increased awareness of climate change and changes wrought by the pandemic have combined to make consumers more aware than ever before of the fashion industry's carbon footprint and of the implications of their own consumption behaviours.

In our survey, 97% of consumers said that it was somewhat or very important to them that their fashion choices be sustainable. Furthermore, nearly three quarters of respondents said they had made changes to their own fashion shopping habits to reduce their environmental impact.

Notably, older consumers were more likely to report having made changes to reduce their footprint, with 68% of those under 35 reporting that they had made changes compared to 76% of those over 35. This could indicate that Gen Z consumers have a shorter consumption history to address and change, or perhaps that Millennial and Gen X consumers have greater means to spend more on more sustainable shopping habits, which are generally perceived to be more expensive.

Regardless, a majority of consumers across all age groups indicated having made some changes to their consumption behaviours.

### How important is it to you that your fashion choices be sustainable?



When asked which changes they've made to their clothing shopping habits, the most frequent response fit into the category of "buying fewer clothes". This is consistent with analysis we conducted in 2020, in which this was also the most commonly cited change.

But there are also some notable differences between the data from 2020 and 2021. In 2020, the second most popular change to consumption behaviour was "choosing sustainable brands", but this year that category dropped to the fourth most popular spot, behind "buying secondhand" and "recycling old clothes". The categories of "buying higher quality" and "avoiding fast fashion" also dropped in popularity from 2020 to 2021. These changes may indicate that over the past year, consumers have begun to focus more on behavioural shifts that have to do with recycling and buying secondhand and less on shifts that have to do with buying new.

These numbers make clear that the volume of clothing matters to consumers when it comes to sustainability. Brands must address this in their sustainability initiatives – it can't just be about better fabrics.

Of course, it's worth noting that fashion sales are still on the rise, with sales up 7.4% for January through June 2021 compared to the same period in 2019<sup>(6)</sup>. So it's not always the case that consumers self-reported behavioural shifts around sustainability square with their actual consumption habits. Still, it's revealing that the top two categories of responses have to do with buying fewer new clothes. It remains to be seen what this will portend for the future of the industry.

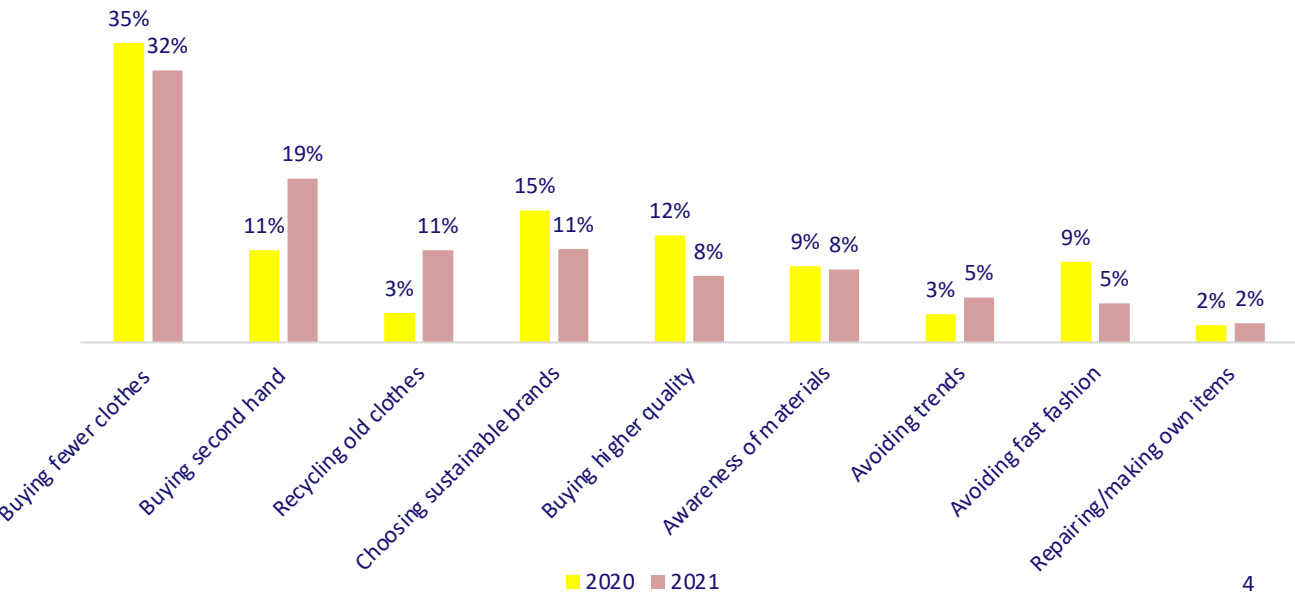
**Consumers are increasingly focused on sustainable shopping behaviours that have to do with recycling and buying secondhand.**

In any case, there is a subset of consumers who are already buying less, and there's a greater emphasis than ever before on downstream behaviours like recycling and buying secondhand that extend the useful life of garments.

Given that consumers say they want to buy less, brands should give serious thought to slimming down and rationalising assortments.

**What changes have you made to your own fashion shopping habits to reduce your environmental impact?**

Free-text response; numbers represent percentage of total responses that fell into the indicated category



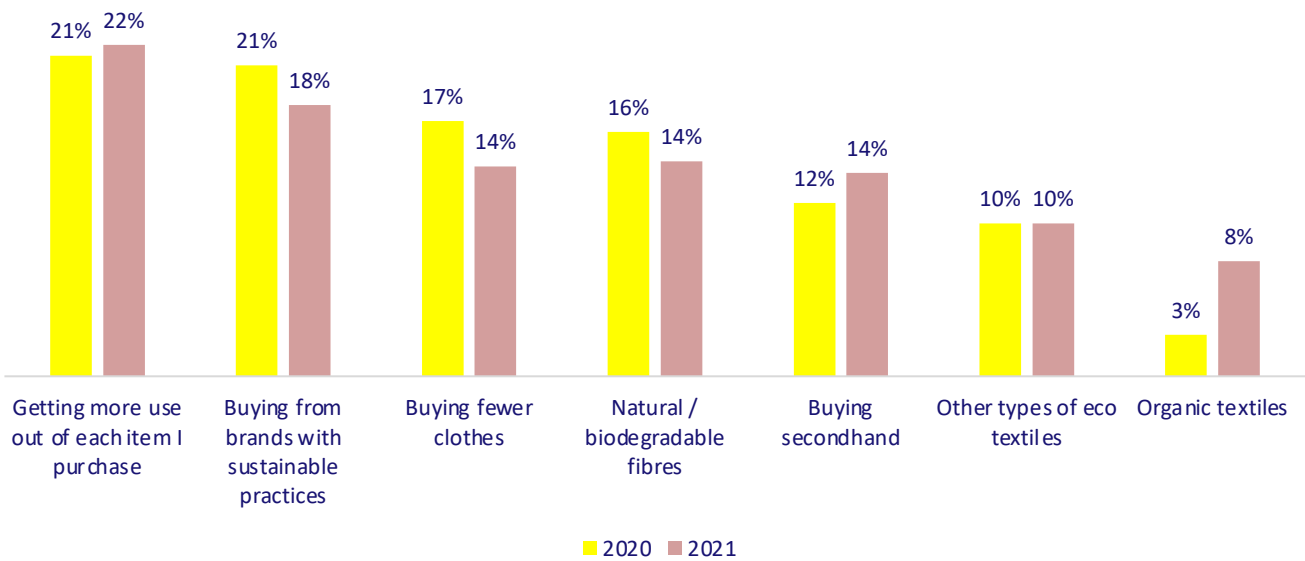
# What sustainable fashion means

When asked the related question “What does sustainable fashion mean to you?”, respondents indicated that getting more use out of each purchase, buying from brands with sustainable practices, and buying fewer clothes were all at the top of the list.

These results are consistent with the results from 2020, with minimal shifts between categories. One category that showed a marked increase in 2021 was “organic textiles”, which now is almost on par with “other types of eco textiles” in importance to consumers.

## What does sustainable fashion mean to you?

Multiple choice





# The perils of greenwashing

In last year’s analysis greenwashing emerged unprompted as a key concern of fashion consumers. This year, we decided to probe this topic more deeply.

When we asked respondents if they ever feel sceptical of fashion brands’ sustainability claims, a whopping 80% said yes.

Respondents were asked, in free text format, which types of sustainability claims made them the most sceptical. The top category of answer was “lack of transparency or supporting evidence”, with respondents saying that vague claims such as “100% sustainable”, or other claims without detailed evidence, were problematic.

Workers’ rights also emerged as a top concern, with many respondents saying they felt that environmental sustainability claims

were hypocritical or worthless without accompanying commitments to fair labour practices.

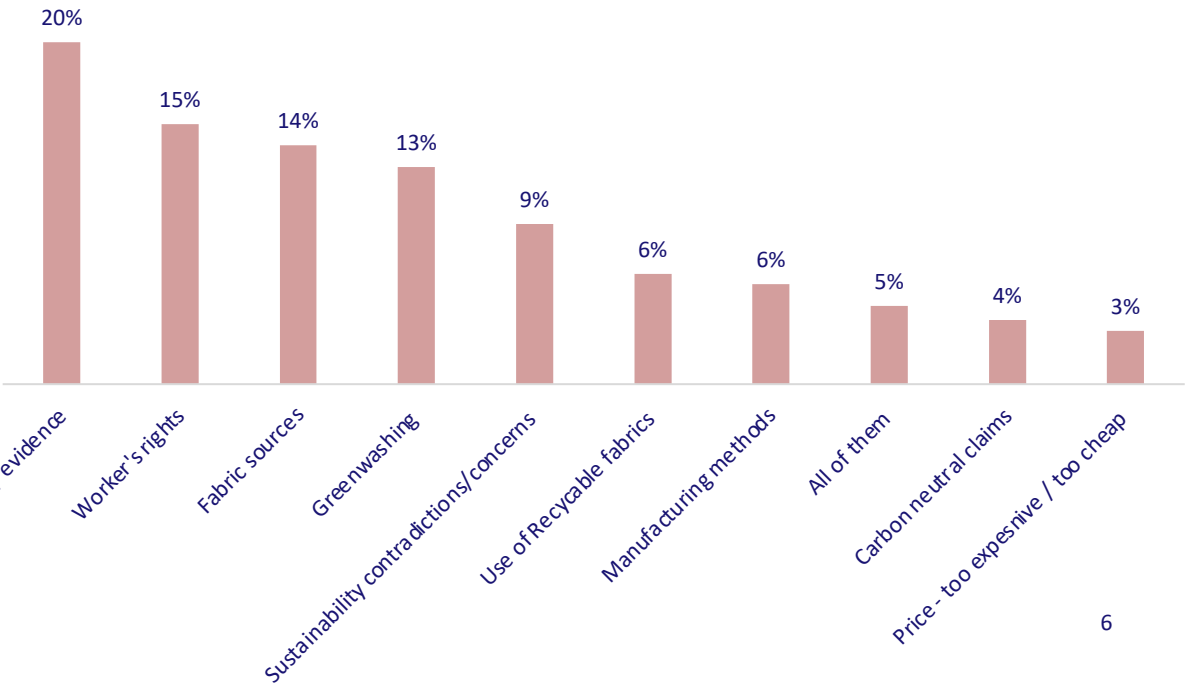
**80% of respondents report being sceptical of fashion brands’ sustainability claims.**

Many respondents also reported feeling sceptical about claims having to do with fabric sources, indicating that there is often no evidence to prove the provenance of organic fabrics and that they find “100% recycled” claims to be dubious.

A smaller subset of respondents said they are sceptical about *all* sustainability claims from fashion brands, and “greenwashing” emerged as a top buzzword, indicating how top of mind it is.

## Which types of sustainability claims make you the most sceptical?

Free-text response; numbers represent percentage of total responses that fell into the indicated category



# Navigating what comes next

Life may feel more certain than it did in the midst of the pandemic, but it's far from clear how consumers' long-term behaviours will change as a result. However, whether it's a result of COVID or the natural evolution of consumers' increased awareness of climate change, it's apparent that consumers are starting to care a lot more about sustainability in fashion.

Brands must be aware of consumers' growing demands for more sustainable practices, but sustainability efforts must also be genuine – greenwashing isn't likely to dupe an increasingly savvy consumer base.

The way consumers feel is shifting rapidly. Brands must keep a finger on the pulse of this changing sentiment to survive.

In particular, brands should consider that for consumers, consumption volume is a key ingredient in sustainability. This means it will become increasingly important that brands produce the items consumers actually want to buy, in the right quantities.

**The brands that can quickly measure and respond to consumer sentiment will be the winners.**

As we reported earlier this year, most brands still don't use technology to predict demand <sup>(7)</sup>. The brands that can most quickly innovate to measure and respond to consumer sentiments will be the winners in this new landscape.



## About Wovn:

We help fashion brands access real-time insights to better predict demand and engage with customers. Find out more at [www.wovn.co](http://www.wovn.co)

## Research methodology:

Wovn surveyed 533 consumers for this research. 88% of respondents came from the UK and the US, with the remainder mostly spread across Europe.

## Endnotes:

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