

WOVN

Consumer views on Sustainability in Fashion 2020



Uncertainty and hope

2020 was supposed to be the year that fashion consumers woke up to climate change. Instead it became the year of Covid-19. In the initial months of the pandemic, as the global economy ground to a halt, climate gains suddenly seemed within reach. Pollution disappeared from urban skies. Daily fossil fuel emissions dropped by an astonishing 17 percent before they began to tick back up again⁽¹⁾.

Consumer fashion habits, too, have changed drastically overnight. Facing looming economic uncertainty and with nowhere to go, consumers stopped buying most categories outside of athleisure.

What impact has the crisis had on consumer attitudes towards sustainability, in particular in the realm of fashion? Our research shows that not only do they care,

they're also beginning to change their consumption habits accordingly.

The overwhelming majority of the more than 500 respondents we surveyed (99%) said that it is somewhat or very important to them that their fashion choices be sustainable. This is even more pronounced amongst Gen Z consumers, nearly 50% of whom told us that it's very important.

Does consumer behaviour bear this out? According to our research, it does. 83% of respondents told us they've made changes to their own shopping behaviour to reduce their environmental impact.

These results give us great hope that changing consumer attitudes – and consumption habits – will stick. Brands would do well to mind the message consumers are sending loud and clear.



Consumer attention focuses on fashion

As the climate crisis has gathered awareness over the past few years, consumer attention has shifted to personal habits. In the UK, almost half of all consumers say they feel guilty about their plastic consumption⁽²⁾. In the US, two-thirds of consumers say they are eating less meat⁽³⁾.

The fashion industry is responsible for 10% of annual global carbon emissions, more than all international flights and maritime shipping combined⁽⁴⁾. Fashion choices are inherently intimate and universal; clothing touches our skin, and we all need to wear it. For most people, it's the most immediate and obvious outward expression of personality.

The fashion industry is responsible for 10% of annual global carbon emissions, more than all international flights and maritime shipping combined⁽⁴⁾.

Given how fraught clothing choices are with personal meaning, are consumer attitudes towards fashion shifting in the same way that they are towards other industries? Our research indicates the answer is yes.

99% of the consumers we surveyed said that it is somewhat or very important to them that their fashion choices be sustainable. This was most pronounced among Gen Z respondents – those ages 24 and under – almost half of whom (49%) told us that it's very important. The only demographic with more than 1% responding that it's not important that their choices be sustainable was the 55+ age group, 5% of whom responded “not important at all.”

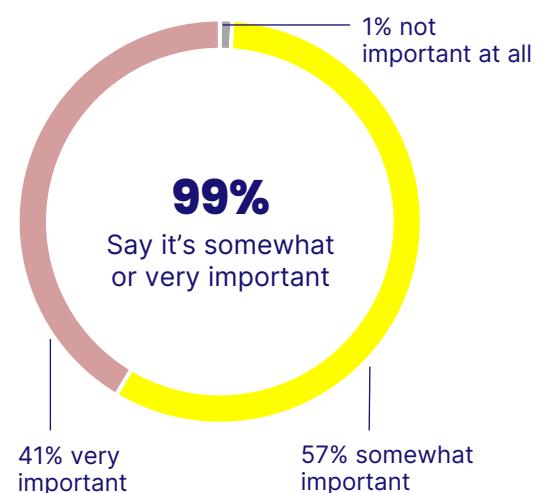
Consumers are also increasingly savvy about greenwashing across industries, and fashion is no exception.

They are no longer willing to accept at face value brands' claims that their collections are “sustainable” or “conscious” without proof or transparency⁽⁴⁾. Social media serves as a platform for amplifying the voices of sceptical and disenchanted consumers questioning brands' sustainability claims. This has become even more true as social media use has soared during lockdown and become a greater channel for social activism.

Perhaps this is why in our survey many respondents cited greenwashing concerns without being prompted.

Like meat consumption, fashion consumption on the whole is expected to increase over the next several years as the world population grows bigger and richer. But that doesn't mean that habits aren't already shifting, which for certain consumers in certain markets, they clearly are.

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



When we asked consumers whether they have made any changes to their own fashion shopping habits to reduce their environmental impact, the answer was a resounding yes. 83% of respondents told us they had made changes, with many of those outlining more than one specific change.

The most commonly cited change respondents said they had made, by a wide margin, was buying fewer clothes. Other common responses included choosing sustainable brands, buying higher quality clothes that will last longer, buying second hand, and avoiding fast fashion.

Brands should take notice, because the self-reported efforts of consumers to reduce personal environmental impact do not completely square with most brands' public sustainability initiatives. These initiatives tend to focus on manufacturing practices, including using organic or recycled fabrics, less water-intensive processes, and less harmful dyes. But these efforts are not likely to be sufficient for planet-conscious consumers whose first answer to the question of how to be more sustainable is to buy less.

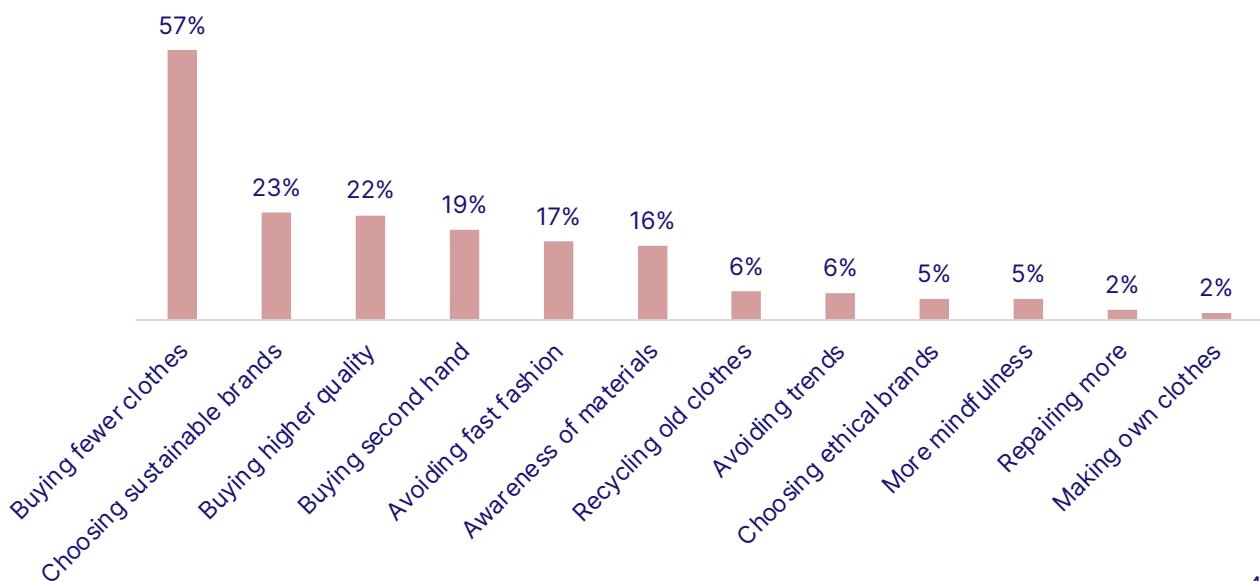
Consumers understand that there are problems of excess and waste in the fashion industry, and this awareness is sure to continue to grow. Brands will need to become better at managing the problem of waste in their supply chains and will have to do a better job of communicating their efforts to their customers.

The self-reported efforts of consumers to reduce personal environmental impact do not completely square with most brands' public sustainability initiatives.

Furthermore, if consumers are really beginning to follow through on buying fewer clothes, brands will need to become smarter and more efficient in their operations to remain profitable. If the pie is going to shrink, then the brands that are able to truly understand the psychology of consumers around sustainability and can execute efficiently will have a huge advantage.

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

Free-text response; numbers represent percentage of respondents whose response fell into the indicated category



What better means, and how much it's worth

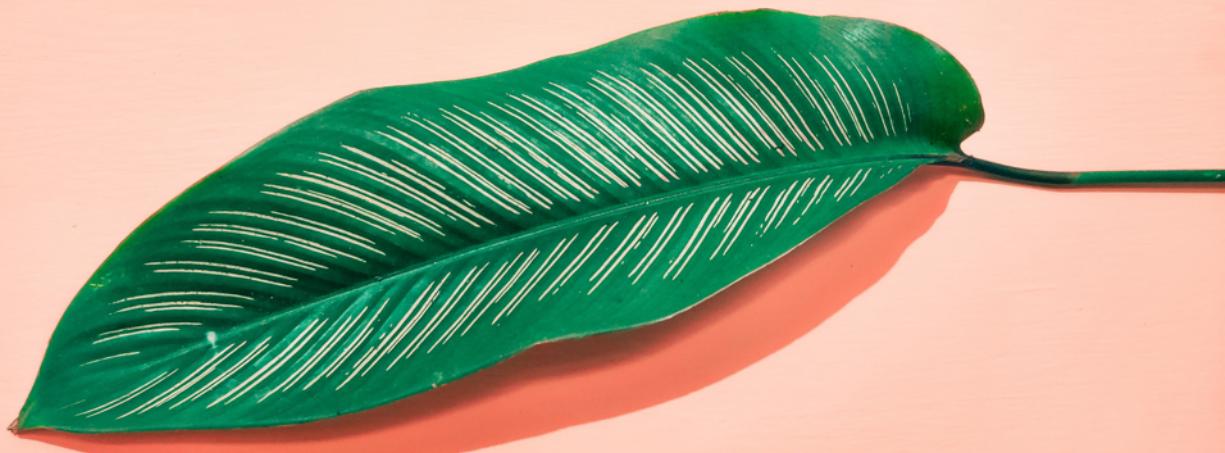
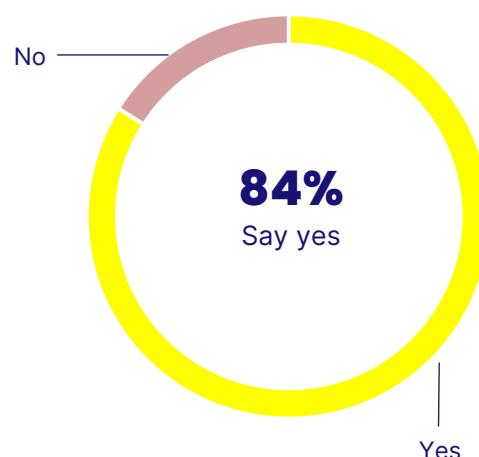
It's clear that not only are consumers shifting their own habits; they also have new demands of the brands they purchase from. When we asked the slightly different question "What does sustainability in fashion mean to you?" 69% of respondents said that it meant buying from brands with sustainable practices.

When asked "What does sustainability in fashion mean to you?" 69% of respondents said that it meant buying from brands with sustainable practices.

However, It's clear that just claiming to be sustainable isn't enough; many respondents identified specific practices they find problematic, noting for instance that organic cotton isn't necessarily low-impact. One respondent noted she finds organic cotton and recycled polyester initiatives meaningless when they come from brands whose entire business model is built on producing unsustainable volumes of product.

No matter how they define it, consumers are, on the whole, very willing to pay a premium for sustainable fashion. When we asked whether they would be willing to pay more for clothing from a sustainable brand, 84% of respondents said yes.

Would you pay more for clothing from a sustainable brand?



Gen Z consumers spend less but care more

On almost every measure, the Gen Z respondents in our research, those ages 18-24, were the most likely to prioritise sustainability in their fashion choices.

It's highly likely that as Gen Z's spending power grows, so will their willingness to pay more for sustainable fashion.

They say it's very important generally that their fashion choices be sustainable (49%), they've made changes to their fashion shopping habits to limit their impact (83%), and they have clear ideas about what sustainability means to them (buying less, getting more out of each item they purchase, and buying from sustainable brands).

However, Gen Z was not the demographic most likely to spend more on sustainable fashion. That distinction goes to Gen X respondents, ages 45-54, an astonishing 92% of whom said they would pay more for clothing from a sustainable brand.

It may be the case that Gen Z consumers, while they clearly prioritise sustainability in fashion, don't feel that they have the spending power to pay the premium commanded by sustainable brands. It's highly likely that as their spending power grows, so will their willingness to pay more for sustainable fashion.



Consumers want to hold brands to account

The evidence clearly demonstrates that consumers understand that it's the quantity, not just the quality, of the clothing they consume that determines their impact on the environment.

94% of respondents said if they learned a fashion brand was making a commitment to reducing waste, it would make them more inclined to purchase from that brand.

Likewise, consumers are also beginning to understand the scale of the waste the industry creates by way of overproduction. Brands typically overproduce by 40%, and 20 billion garments that are produced every year are never sold. Burberry famously outraged consumers by burning \$37 million of excess inventory in 2017; in 2018, the brand banned the practice⁽⁶⁾.

When we asked, consumers confirmed that they care about waste in fashion and want to hold brands to account; 98% of survey respondents said if they learned a fashion brand was making a commitment to reducing waste, it would make them feel more positively about that brand. 94% of respondents said it would make them more inclined to purchase from that brand.

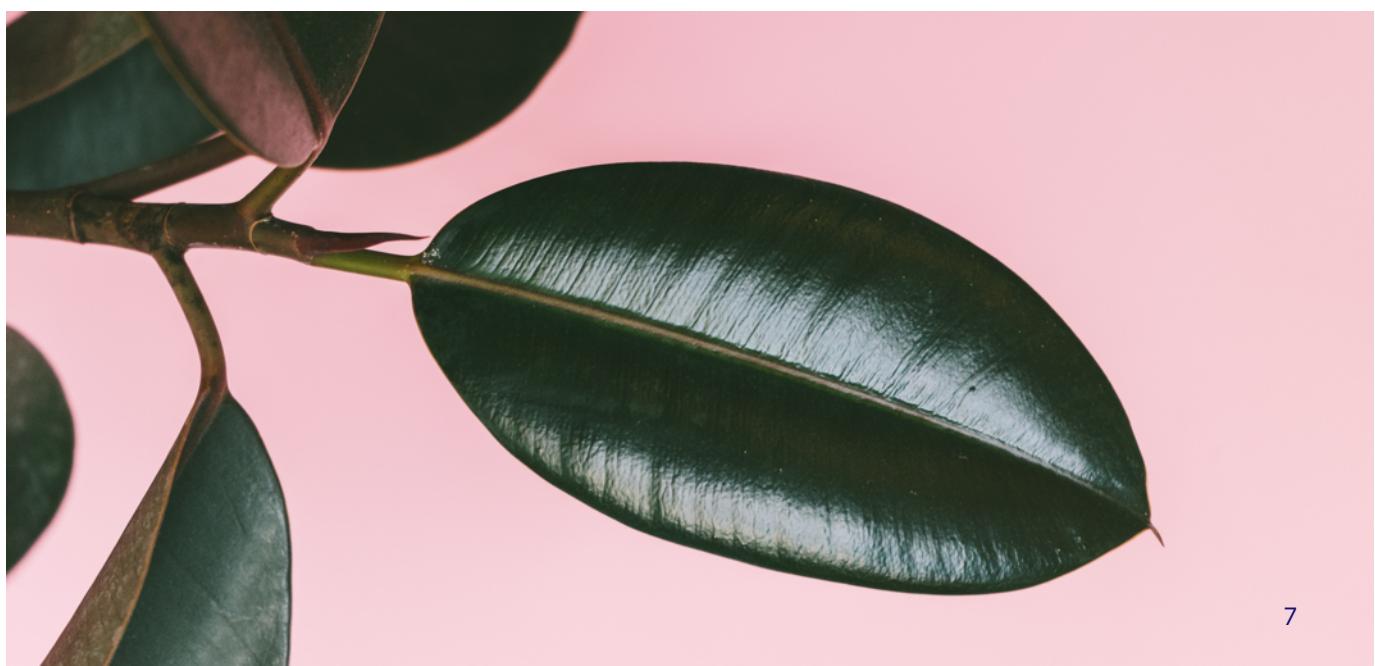
If you learned that a fashion brand was making a commitment to reducing the amount of waste they produce, would it make you...

Feel more positively about the brand?

98% say yes

More inclined to purchase from the brand?

94% say yes



Weathering the storm and seizing opportunity

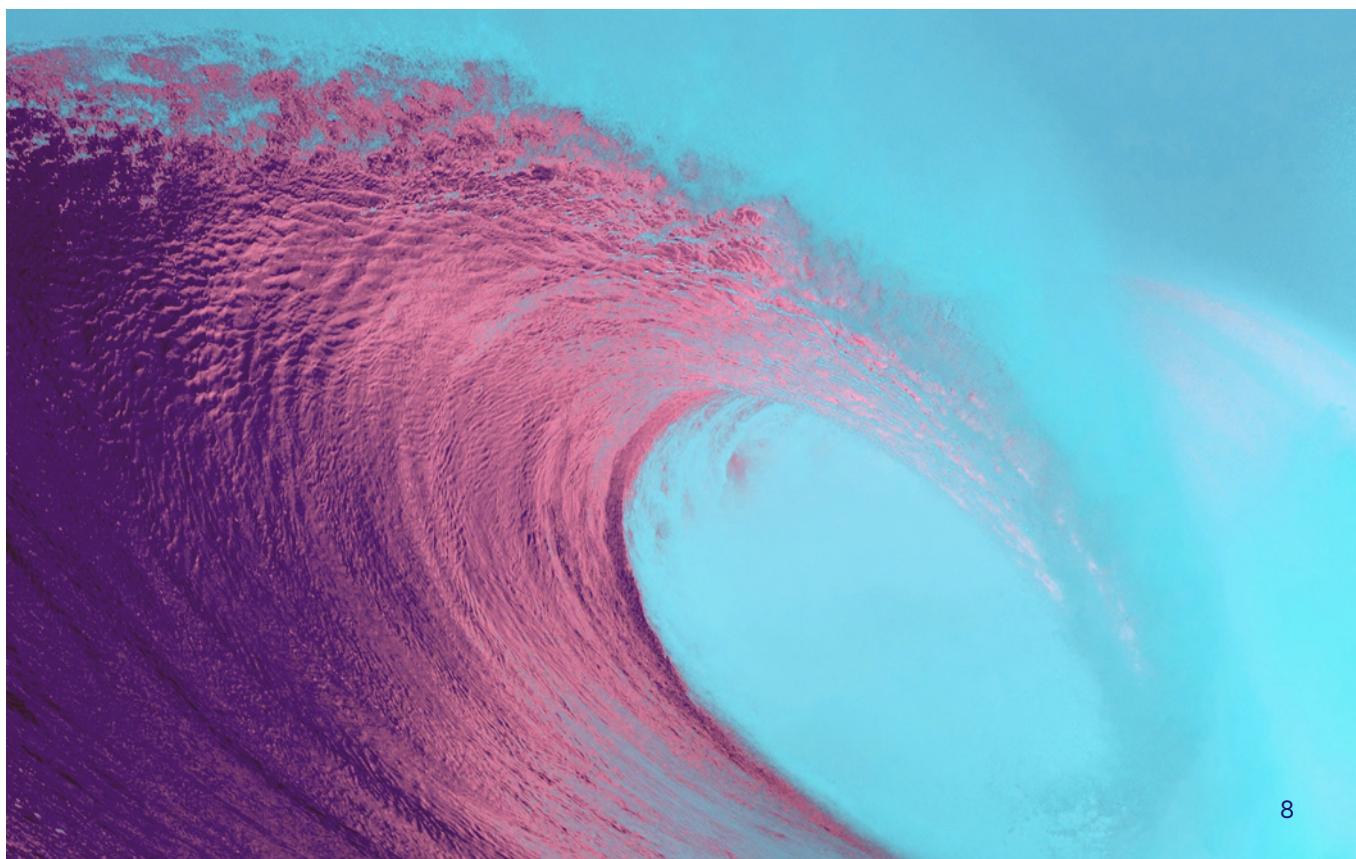
At no other time in living memory has the fashion industry – or the world – faced so much uncertainty. The pace of change is dizzying. Much ink has already been spilled over the reckoning that the industry surely faces, and many brands won't make it. The brands that thrive are likely to be the ones that can develop a sharply honed understanding of what their customers want and can deliver on those desires efficiently.

And what do their customers want? They want to buy certain things and not others, yes. Brands need to understand these desires in real time. But consumers also want to purchase from brands that are doing what they can to produce clothing sustainably and without generating so much waste, and brands need to understand that too.

Brands will have to produce less, for the sake of our planet but also to appeal to customers who are increasingly concerned about the impact of their consumption habits and are voting with their wallets.

The brands that thrive are likely to be the ones that can develop a sharply honed understanding of what their customers want and can deliver on those desires efficiently.

Staying afloat will require hard work, ingenuity, and innovative technologies. We're confident that brands can meet the challenge – those that can't will surely be held to account by consumers whose awareness of fashion's impact on the planet is growing every day.



About Wovn:

We help fashion brands access real-time insights through social audiences to better predict demand and engage with new customers. Find out more at www.wovn.co

Endnotes:

1. Plummer, Brad and Nadja Popovich, "Emissions are surging back as countries and states reopen", The New York Times, 17 June 2020, <https://www.nytimes.com/interactive/2020/06/17/climate/virus-emissions-reopening.html>
2. Watts, Jonathan, "Half of UK consumers willing to pay more to avoid plastic packaging", The Guardian, 19 April 2019, <https://www.theguardian.com/environment/2019/apr/19/half-of-uk-consumers-willing-to-pay-more-to-avoid-plastic-packaging-survey-shows>
3. Coffman, Vannessa and Darcy Milburn, "Two-thirds of U.S. consumers say they are eating less meat", Johns Hopkins University Hub, 12 September 2018, <https://hub.jhu.edu/2018/09/12/consumers-cut-back-on-meat-consumption/>
4. "How much do our wardrobes cost to the environment?", The World Bank, 23 September 2019, <https://www.worldbank.org/en/news/feature/2019/09/23/costo-moderno-medio-ambiente#:~:text=The%20fashion%20industry%20is%20responsible,more%20than%2050%20%25%20by%202030>
5. Mondalek, Alexandra, "How to avoid the greenwashing trap", The Business of Fashion, 18 May 2020, <https://www.businessoffashion.com/articles/professional/greenwashing-fashion-sustainability-marketing>
6. Cernansky, Rachel, "Fashion has a waste problem. These companies want to fix it", Vogue Business, 6 January 2020, <https://www.voguebusiness.com/sustainability/fashion-waste-problem-fabrics-deadstock-pashko-burberry-reformation>