

CONSUMER SURVEY REPORT (RESULTS-ONLY)

NOVEMBER 2018

*A condensed, results-only version of the baseline survey on
EU consumer attitudes to sustainability and supply chain
transparency in the fashion industry.*

**FASHION
REVOLUTION**

INTRODUCTION

Fashion Revolution commissioned a survey of 5,000 people aged 16–75 in the five largest European markets, including Germany, United Kingdom, France, Italy and Spain, to find out how supply chain transparency and sustainability impacts EU consumers' purchasing decisions when shopping for clothing, accessories and shoes.

5000

RESPONDENTS

16 - 75

AGES

05

COUNTRIES

We wanted to find out what information consumers would like fashion brands to share when it comes to social and environmental impacts and to better understand what roles consumers think that governments and laws should play in ensuring clothing is sustainably produced.

The survey questions were designed to correlate with the following United Nation's Sustainable Development Goals:

- SDG 1 – End poverty in all its forms, everywhere.
- SDG 5 – Achieve gender equality and empower all women and girls.
- SDG 8 – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all.
- SDG 12 – Ensure sustainable production and consumption patterns.
- SDG 13 – Take urgent action to combat climate change and its impacts.

This survey was conducted by Ipsos MORI 5th – 9th October 2018. The analysis and report was written by Fashion Revolution.

Technical notes: All figures are percentages. Interviews were conducted online. Numbers may not always add up to 100% due to computer rounding or multiple answers.

Base: 1088 adults aged 16–70 in Germany; 1100 adults aged 16–75 in France; 1094 adults aged 16–70 in Italy; 1098 adults aged 16–65 in Spain; 1129 adults aged 16–75 in the UK.

Fashion Revolution will use this research to inspire consumers, companies and governments to each play their role in driving long-term industry-wide change towards a fairer, safer, cleaner and more transparent future of the fashion industr

This is a baseline survey and will be conducted again in 2020 in order to measure changes in consumer attitudes.

QUICK KEY FINDINGS

When buying clothes, more than one in three consumers surveyed across the five largest EU markets said that they consider social (38%) and environmental impacts (37%).

More people (39%) said that buying clothes made by workers paid a fair, living wage was important than any other topic surveyed, including: environmental protection (37%), safe working conditions (31%), animal welfare (30%), local production (10%) and use of recycled materials (6%).

The majority of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty (84%), climate change (85%), environmental protection (88%) and gender inequality (77%).

More than one in three people consider social and environmental impacts when buying clothes.

The majority of consumers want to know more about the clothes they buy:

- 67% of people would like fashion brands to tell them where the materials used in their products come from;
- 59% would like to know how their clothes are manufactured;
- 61% of people are interested in learning about what fashion brands are doing to minimise their impacts on the environment and to protect their workers' human rights;
- 59% of people are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products.

The majority of consumers (68%) agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced.

The majority of consumers also agreed that fashion brands should be required by law to:

- respect the human rights of everybody involved in making their products (77%)
- protect the environment at every stage of making their products (75%)
- provide information about the social impacts of their business (68%)
- provide information about the environmental impacts of their business (72%)
- say if they are paying the workers who make their products a fair, living wage (72%)

72% of people said that fashion brands should do more to improve the lives of women making their clothes, shoes and accessories.

When choosing a fashion brand to buy, consumers said it is important for brands to:

- publish how products are sustainable on the packaging (72%)
- explain what products are made from on the packaging (77%)
- make it clear where they source materials, ingredients and components from and who manufactured the product (77%)
- share detailed information about wages and working conditions for people in its global supply chain (66%)
- provide information about how they apply socially responsible practices (70%)
- provide information about how they apply environmentally responsible practices (74%)

A large majority of consumers think that fashion brands should publish the factories used to manufacture their clothes (80%) and which suppliers they use to source the materials used in their clothing (77%).

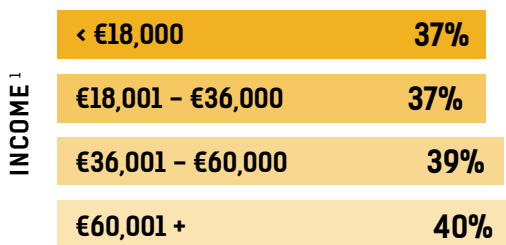
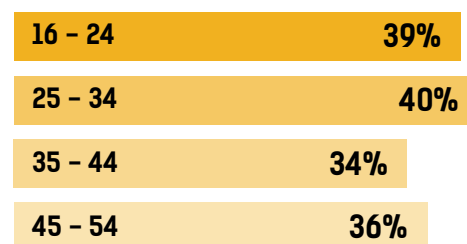
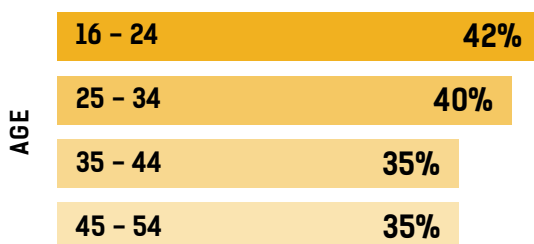
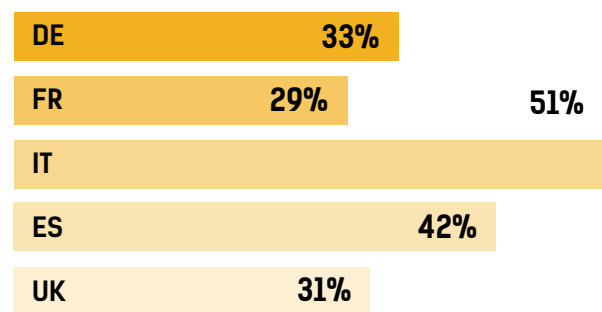
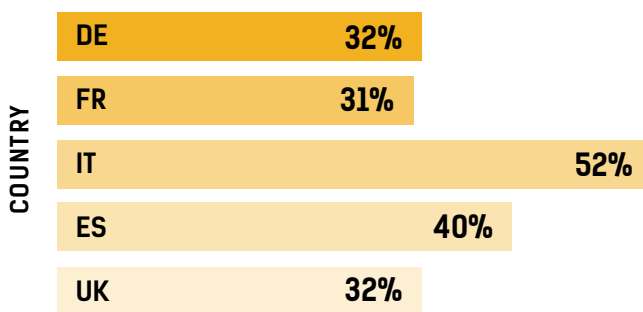
80% of people think fashion brands should disclose their manufacturers.



When purchasing an item of clothing, 38% of people consider the social impact prior to deciding whether or not to purchase the item.



When purchasing an item of clothing, 37% of people consider the environmental impact prior to deciding whether or not to purchase the item.



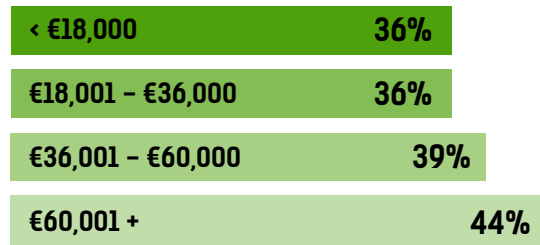
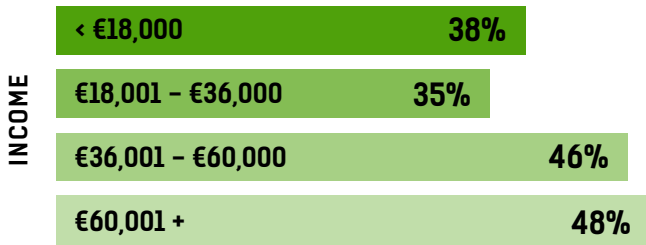
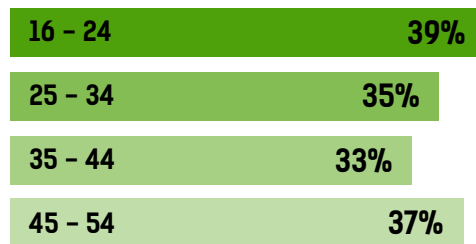
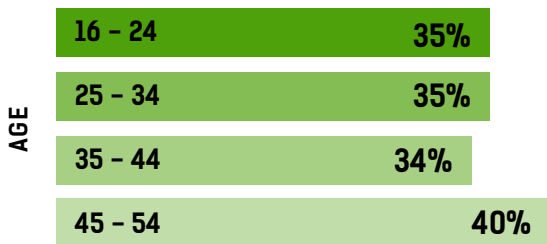
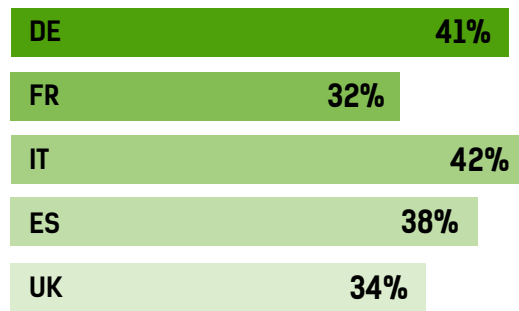
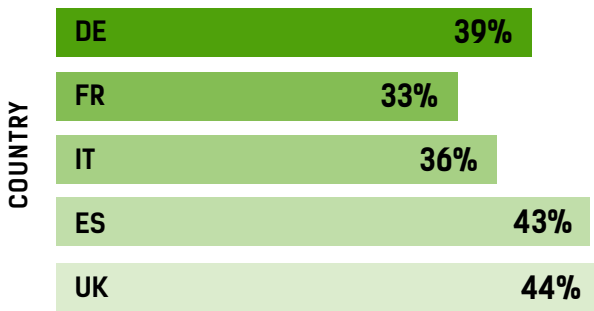
Data represents the percentage of those who answered 'a great deal / a fair amount'.



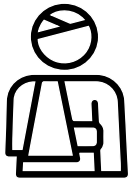
39% of people said it is important that the clothing (including shoes & accessories) they buy is made by workers paid a fair, living wage.



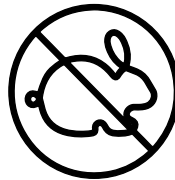
37% of people said it is important that the clothing (including shoes & accessories) they buy is produced in a way that is not harmful to the environment.



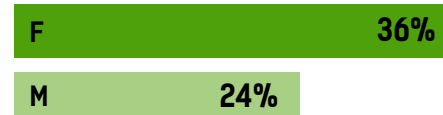
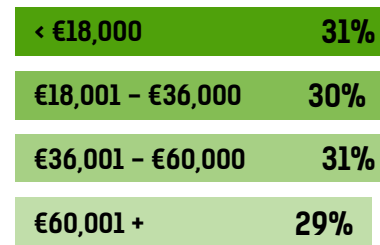
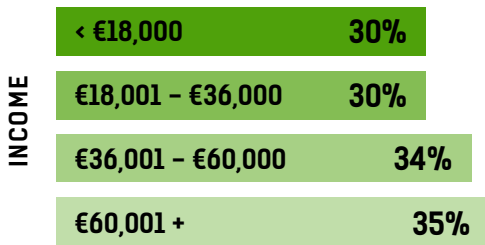
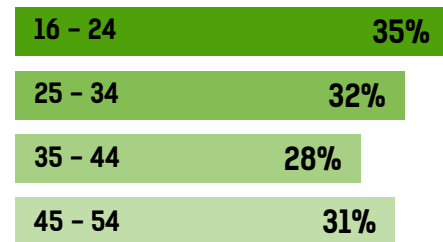
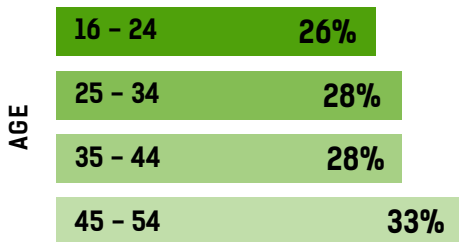
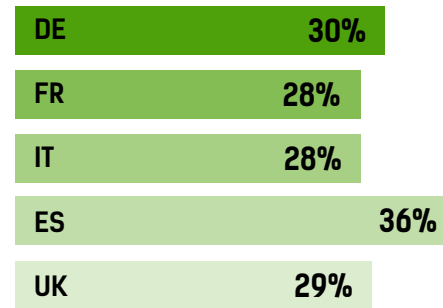
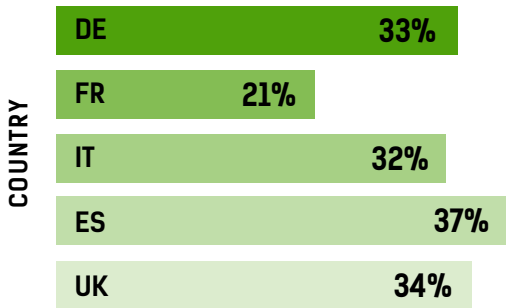
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



31% of people said it is important that the clothing (including shoes & accessories) they buy is produced in safe working conditions.



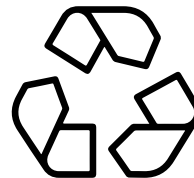
30% of people said it is important that the clothing (including shoes & accessories) they buy is produced without harming animals.



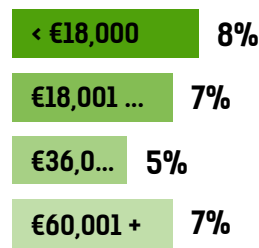
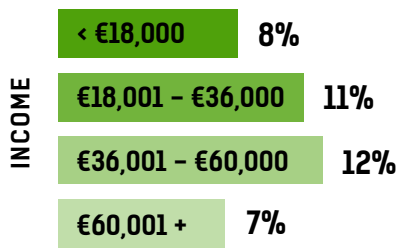
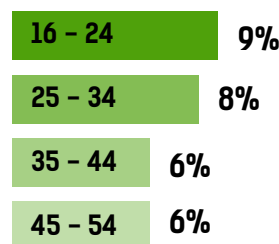
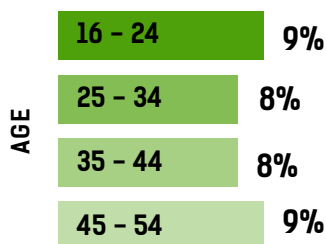
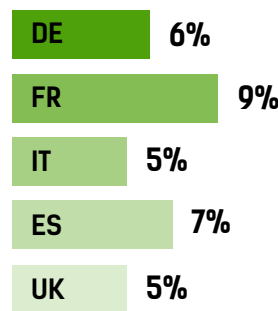
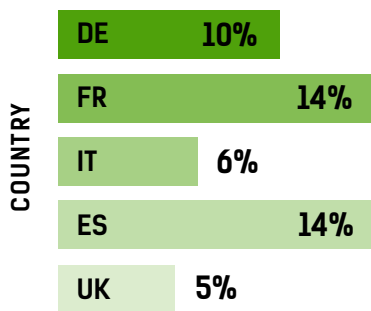
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



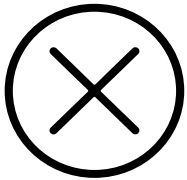
10% of people said it is **important** that the clothing (including shoes & accessories) they buy is produced locally.



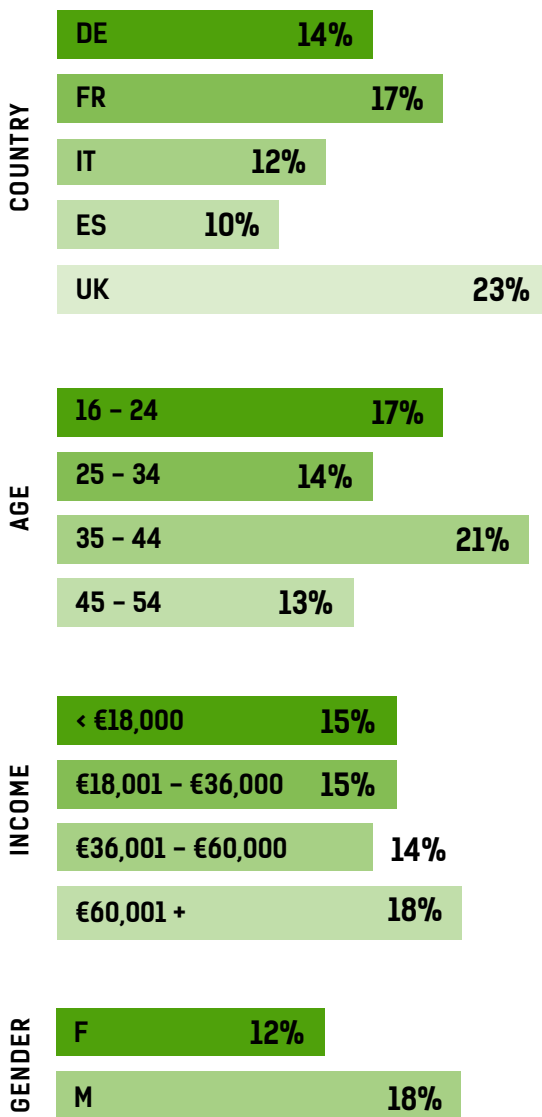
6% of people said it is **important** that the clothing (including shoes & accessories) they buy is made using recycled materials.



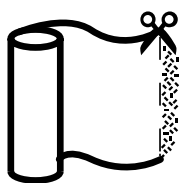
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



15% of people said none of these things are important when it comes to buying clothing.



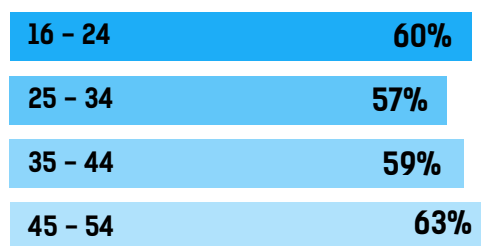
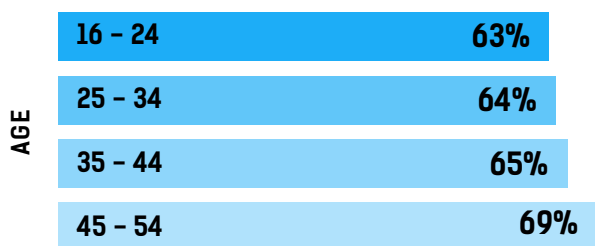
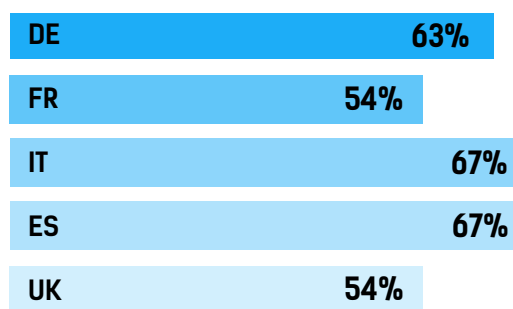
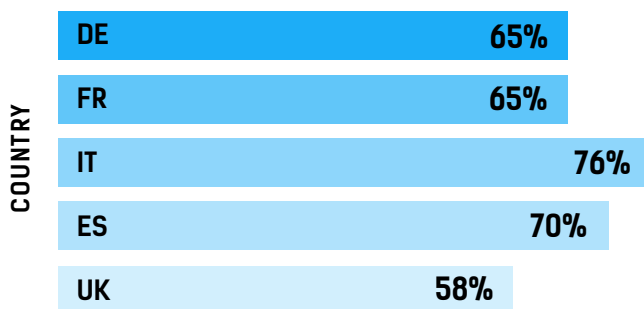
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



67% strongly / somewhat agreed that they 'would like fashion brands to tell me about where the materials used in their products come from.'



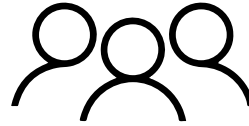
61% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to minimise their impact on the environment.'



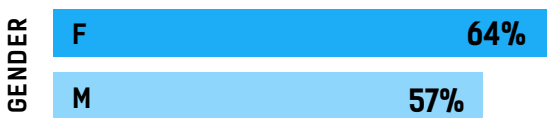
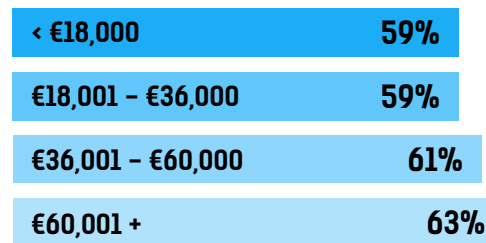
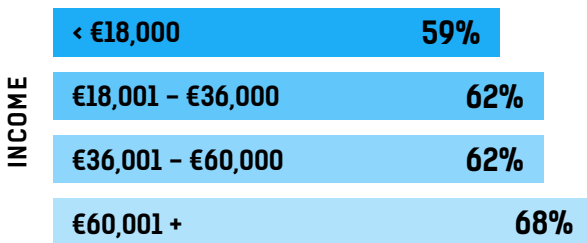
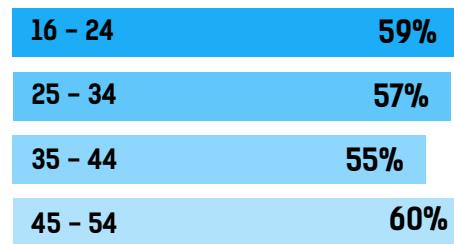
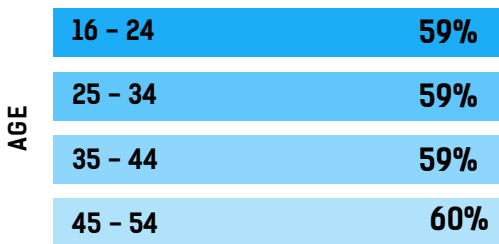
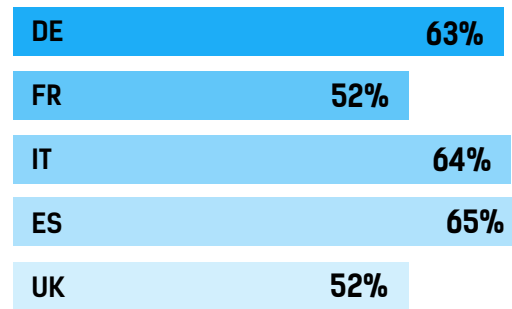
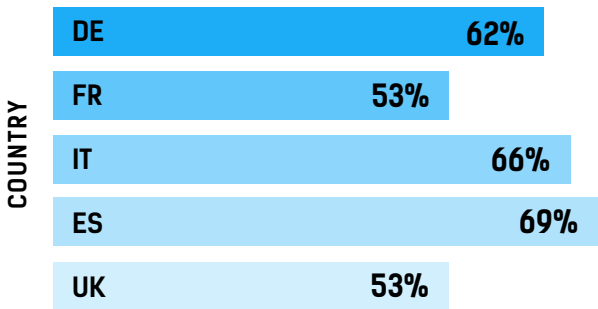
Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



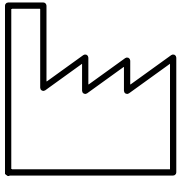
61% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to protect their workers' human rights.'



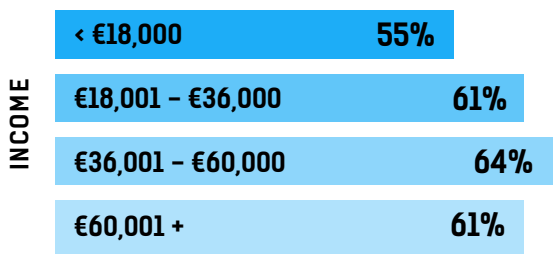
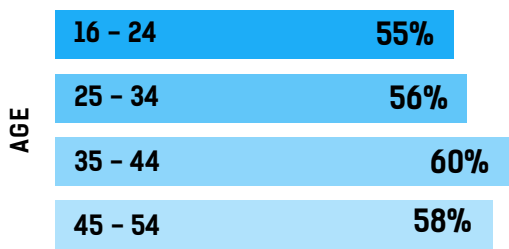
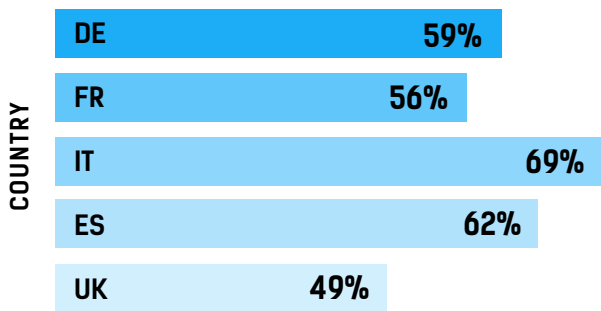
59% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to improve the lives of people in the societies where they manufacture their products.'



Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



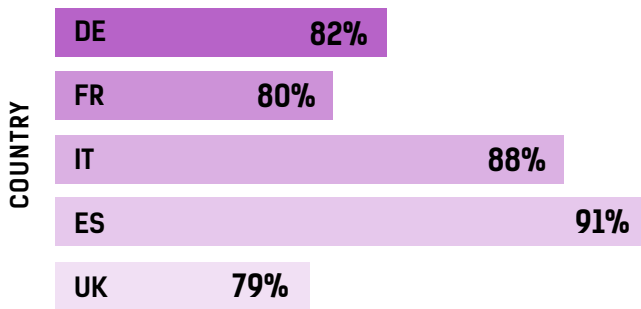
59% strongly / somewhat agreed that they 'would like to know how my clothes were manufactured.'



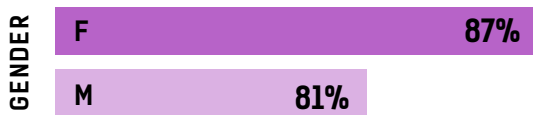
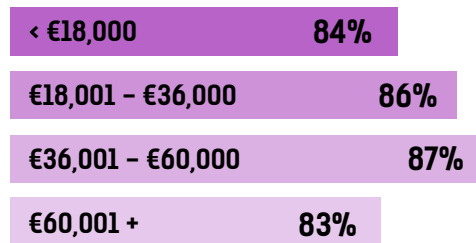
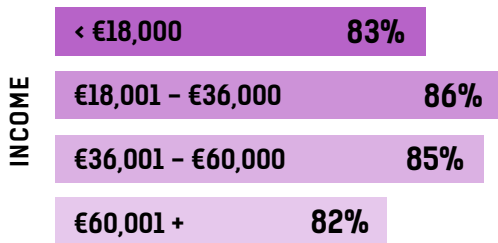
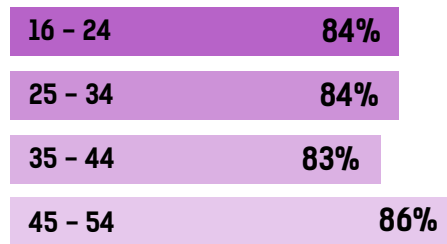
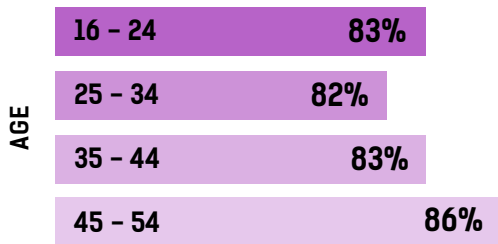
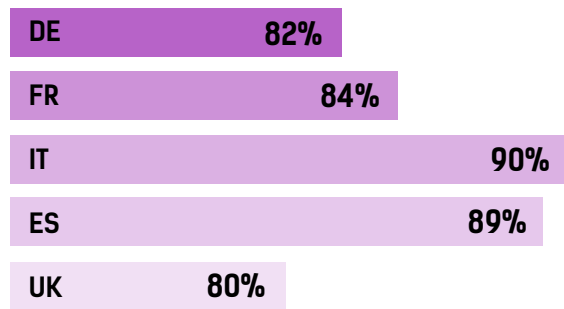
Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



84% think it is **very/somewhat important** that fashion brands tackle global poverty.



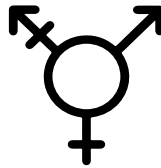
85% think it is **very/somewhat important** that fashion brands tackle climate change.



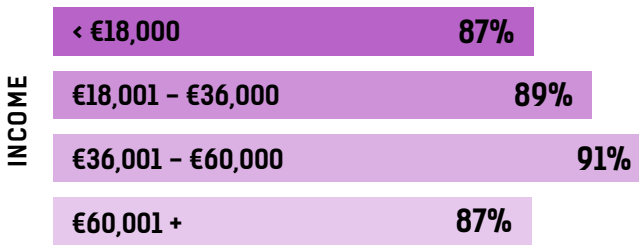
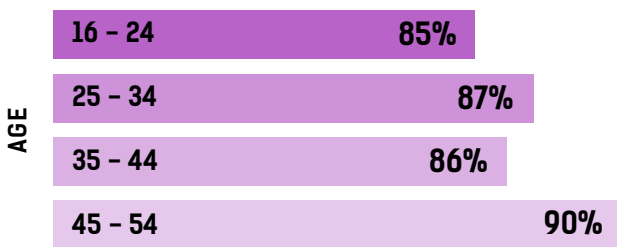
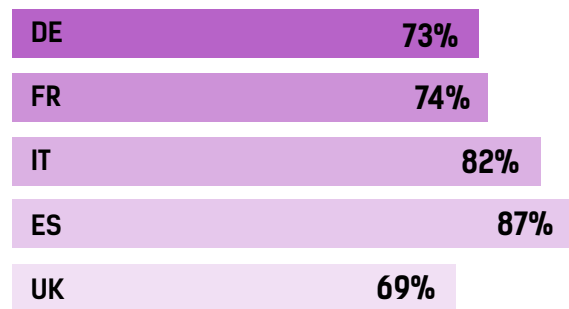
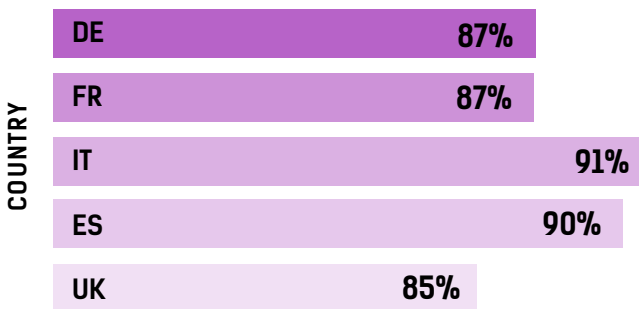
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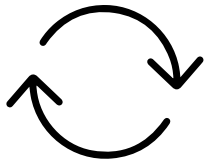
88% think it is **very/somewhat important** that fashion brands tackle environmental protection.



77% think it is **very/somewhat important** that fashion brands tackle gender inequality.



Data represents the percentage of those who answered 'very important' / 'somewhat important'.



68% strongly / somewhat agree that 'The Government has a role to play in ensuring clothing (including shoes and accessories) is sustainably produced.'

77% strongly / somewhat agree that 'fashion brands should be required by law to respect the human rights of everybody involved in making their products.'

COUNTRY	DE	56%
	FR	71%
	IT	75%
	ES	75%
	UK	63%

DE	73%
FR	77%
IT	81%
ES	82%
UK	74%

AGE	16 - 24	68%
	25 - 34	65%
	35 - 44	66%
	45 - 54	71%

16 - 24	76%
25 - 34	73%
35 - 44	75%
45 - 54	79%

INCOME	< €18,000	68%
	€18,001 - €36,000	70%
	€36,001 - €60,000	69%
	€60,001 +	67%

< €18,000	77%
€18,001 - €36,000	78%
€36,001 - €60,000	80%
€60,001 +	77%

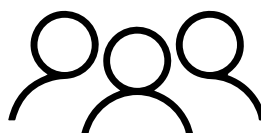
GENDER	F	71%
	M	64%

F	81%
M	74%

Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



75% strongly / somewhat agree that 'fashion brands should be required by law to protect the environment at every stage of making their products.'



68% strongly / somewhat agree that 'fashion brands should be required by law to provide information about the social impacts of their business.'

COUNTRY	Percentage
DE	70%
FR	75%
IT	80%
ES	81%
UK	69%

COUNTRY	Percentage
DE	62%
FR	68%
IT	76%
ES	75%
UK	59%

AGE	Percentage
16 - 24	73%
25 - 34	70%
35 - 44	73%
45 - 54	77%

AGE	Percentage
16 - 24	68%
25 - 34	63%
35 - 44	67%
45 - 54	71%

INCOME	Percentage
< €18,000	75%
€18,001 - €36,000	77%
€36,001 - €60,000	77%
€60,001 +	73%

INCOME	Percentage
< €18,000	67%
€18,001 - €36,000	70%
€36,001 - €60,000	69%
€60,001 +	67%

GENDER	Percentage
F	77%
M	73%

GENDER	Percentage
F	71%
M	65%

Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



72% strongly / somewhat agree that 'fashion brands should be required by law to provide information about the environmental impacts of their business.'



72% strongly / somewhat agree that 'fashion brands should be required by law to say if they are paying the workers who make their products a fair, living wage.'

COUNTRY	Percentage
DE	68%
FR	73%
IT	78%
ES	77%
UK	65%

COUNTRY	Percentage
DE	66%
FR	72%
IT	75%
ES	76%
UK	71%

AGE	Percentage
16 - 24	71%
25 - 34	67%
35 - 44	71%
45 - 54	75%

AGE	Percentage
16 - 24	72%
25 - 34	68%
35 - 44	71%
45 - 54	73%

INCOME	Percentage
< €18,000	71%
€18,001 - €36,000	74%
€36,001 - €60,000	74%
€60,001 +	72%

INCOME	Percentage
< €18,000	73%
€18,001 - €36,000	72%
€36,001 - €60,000	75%
€60,001 +	72%

GENDER	Percentage
F	75%
M	69%

GENDER	Percentage
F	76%
M	68%

Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



72% strongly / somewhat agree that 'fashion brands should do more to improve the lives of women making their clothes, shoes or accessories.'

53% strongly / somewhat agree that 'clothing manufacturers provide a source of income for women who would not have one otherwise.'

COUNTRY	DE	68%
	FR	75%
	IT	75%
	ES	76%
	UK	67%

DE	49%
FR	55%
IT	54%
ES	49%
UK	57%

AGE	16 - 24	69%
	25 - 34	66%
	35 - 44	70%
	45 - 54	75%

16 - 24	50%
25 - 34	46%
35 - 44	50%
45 - 54	56%

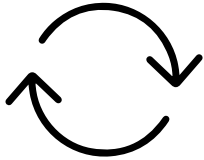
INCOME	< €18,000	71%
	€18,001 - €36,000	75%
	€36,001 - €60,000	74%
	€60,001 +	71%

< €18,000	51%
€18,001 - €36,000	54%
€36,001 - €60,000	55%
€60,001 +	56%

GENDER	F	77%
	M	67%

F	56%
M	50%

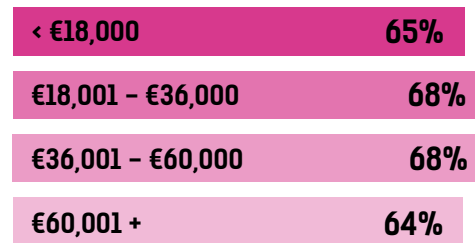
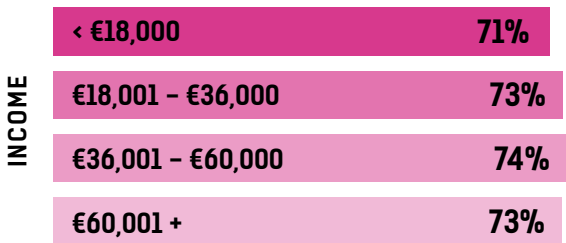
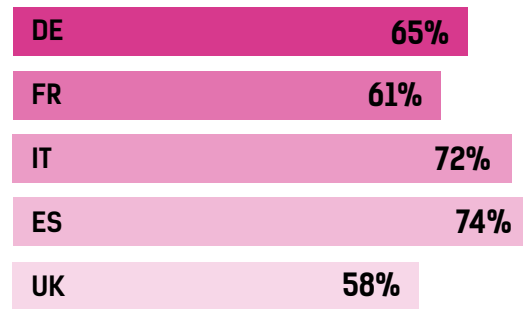
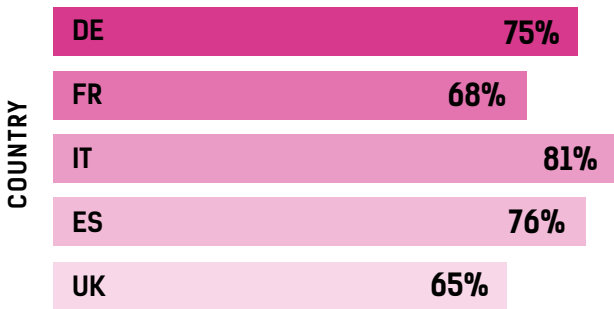
Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



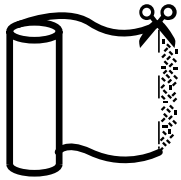
73% said it is **very or somewhat important** for fashion brands to publish how their products are sustainable on the packaging.



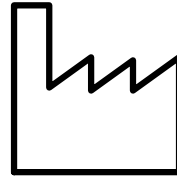
66% said it is **very or somewhat important** for fashion brands to share detailed information about wages and working conditions for the people in its global supply chain.



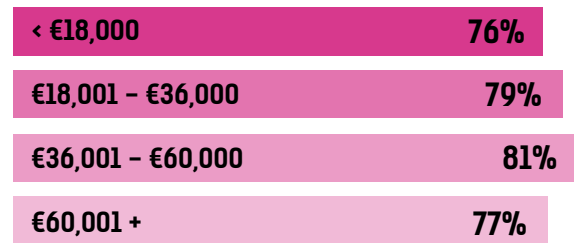
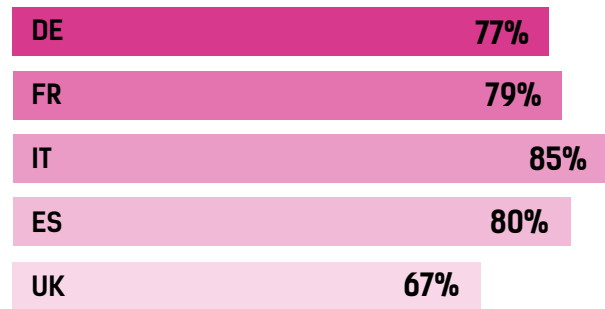
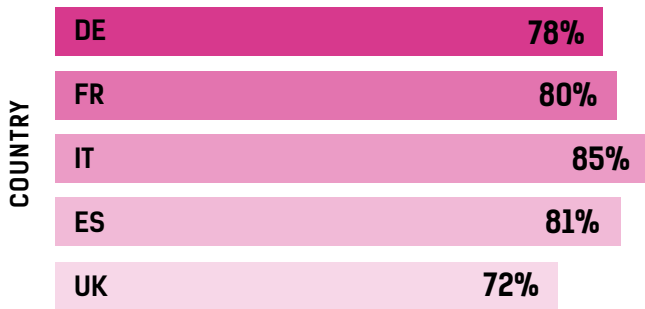
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



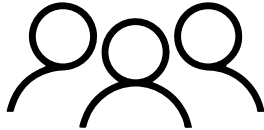
79% said it is **very or somewhat important** for fashion brands to explain what their products are made from on the packaging.



77% said it is **very or somewhat important** for fashion brands to make it clear where they source raw materials, components or ingredients from and who manufactured the products.



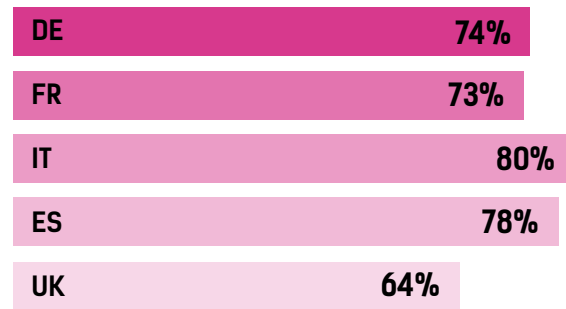
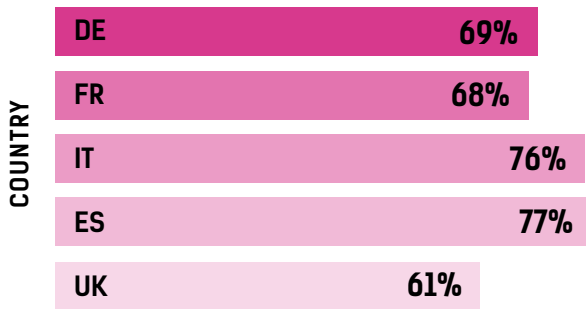
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



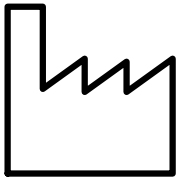
70% said it is **very or somewhat important** for fashion brands to provide information about how they apply socially responsible practices.



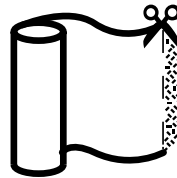
74% said it is **very or somewhat important** for fashion brands to provide information about how they apply environmentally responsible practices.



Data represents the percentage of those who answered 'very important' / 'somewhat important'.



80% said fashion brands should publish which factories are used to manufacture their clothes.



77% said fashion brands should publish which suppliers they use to source the materials used in their clothing.

COUNTRY	Percentage
DE	77%
FR	76%
IT	88%
ES	86%
UK	72%

COUNTRY	Percentage
DE	71%
FR	72%
IT	87%
ES	84%
UK	72%

AGE	Percentage
16 - 24	79%
25 - 34	78%
35 - 44	76%
45 - 54	81%

AGE	Percentage
16 - 24	76%
25 - 34	76%
35 - 44	76%
45 - 54	79%

INCOME	Percentage
< €18,000	78%
€18,001 - €36,000	81%
€36,001 - €60,000	81%
€60,001 +	80%

INCOME	Percentage
< €18,000	77%
€18,001 - €36,000	80%
€36,001 - €60,000	78%
€60,001 +	76%

GENDER	Percentage
F	80%
M	79%

GENDER	Percentage
F	78%
M	76%

Data represents the percentage of those who answered 'strongly agree / somewhat agree'.

CONCLUSIONS

What does this information tell us?

- A significant number of people consider social and environmental impacts when shopping but the vast majority of **people would like to learn more about where their clothes are made and who makes their clothes** as well as what fashion brands are doing to address social and environmental issues.
- The majority of people also think that **the government has a crucial role to play** in ensuring clothes people buy are made sustainably. The majority of people also think that governments should be responsible for holding fashion brands to account for disclosing information about the way their products are made, what suppliers they are working with and how they're applying socially and environmentally responsible practices in their supply chains.
- The results show that **consumers place the onus on fashion brands and governments** to ensure that clothes are produced sustainably and that key issues such as global poverty, fair wages, environmental protection, climate change and gender inequality are being addressed.
- When it comes to buying clothes, more **people care about workers being paid fair, living wages and environmental protection** than they do about clothes being produced locally or made without harming animals or using recycled materials.
- **Consumers expect fashion brands to be more transparent** by sharing detailed information about the factories where their clothes are made and the suppliers they use to source the materials, ingredients and components used in their clothes.

CREDITS

This survey was conducted as part of a baseline study in the 'Trade Fair, Live Fair' project.

'Trade Fair, Live Fair' is a 3-year project funded by the European Commission and brings together 31 partners from the Fair Trade community across the EU, including Fashion Revolution, Fairtrade International, Fairtrade Foundation, World Fair Trade Organisation, Fair Trade Advocacy Office and many others.

Together, we are undertaking a wide range of awareness raising and public mobilisation actions to reach out to 49 million EU citizens: The overall aim is to directly contribute to meeting target 12.8 of the SDGs framework: *"ensure that, by 2030, people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature"*.

This survey was conducted by Ipsos MORI on the behalf of Fashion Revolution in October 2018.

The survey results were analysed and report was written by Sarah Ditty, Policy Director at Fashion Revolution.

The report was designed by Emily Sear, Head of Design at Fashion Revolution.

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