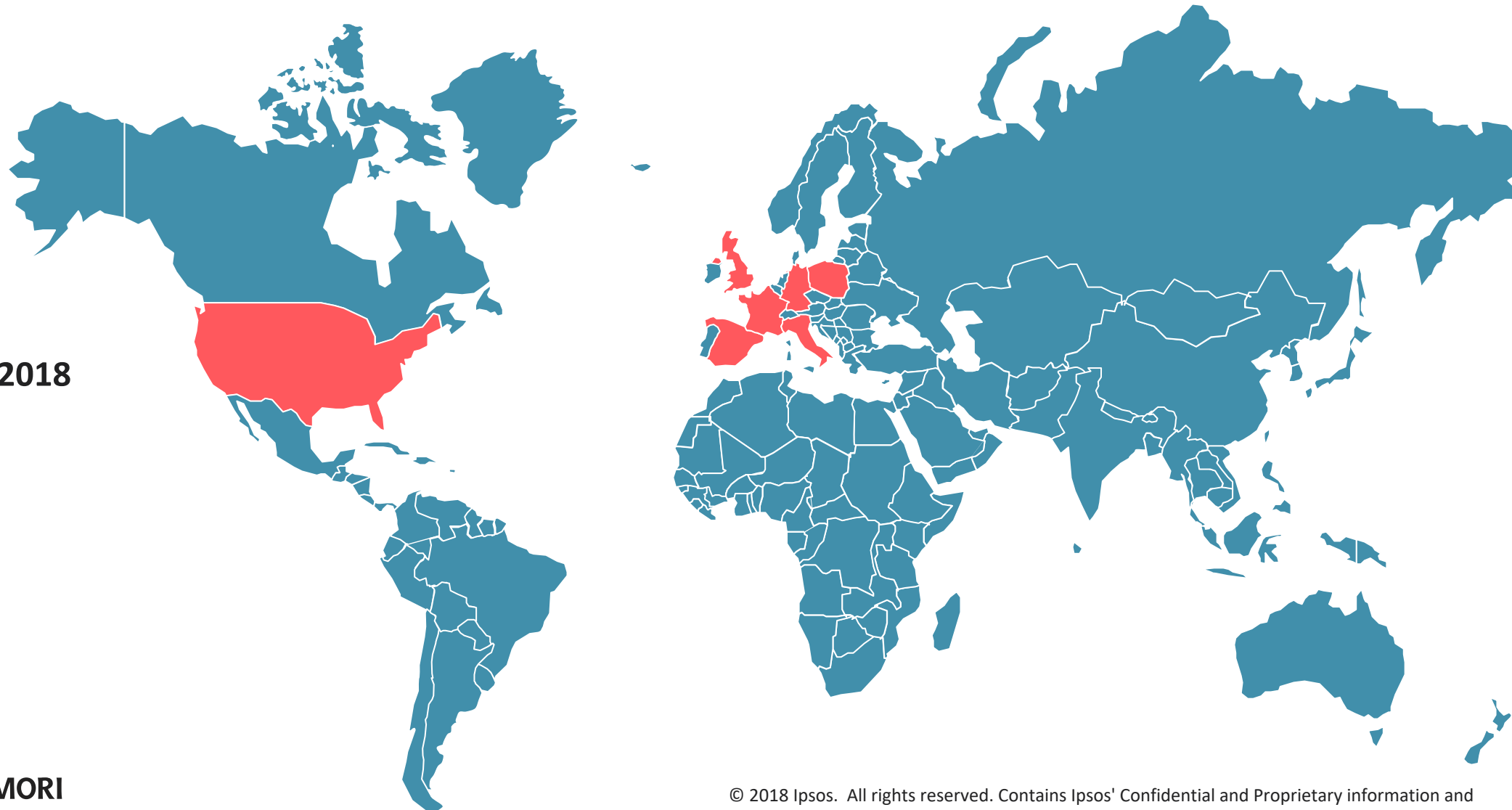


# Sustainable Fashion Survey

Prepared for Changing Markets Foundation

November 2018



# Research design



Ipsos MORI were commissioned by The Changing Markets Foundation to commission a consumer poll amongst adults aged 16-75 in seven different countries; UK, US, France, Germany, Italy, Poland and Spain. **This presentation is the summary of the main findings.**

The survey was carried out online, via Ipsos MORI's online omnibus panel (i:omnibus). The questionnaire included the following topics:



- Questions related to how people purchase their clothes, and the choices they make relating to sustainability.
- Perceptions of sustainability issues within the fashion industry, and the supply chains of clothing brands.
- Views on workers rights and pay in the garment manufacturing industry.
- Specific views on the use of Viscose in the clothes manufacturing process.
- Views on current and alternative clothes certification schemes.



- The survey was hosted on the i:omnibus panel between 19<sup>th</sup> – 26<sup>th</sup> October 2018.
- A total of 7,701 interviews were carried out, with over 1,000 interviews achieved in each country.
- Quotas for age, gender, work status and region were set in each country in order to achieve a representative sample.
- Data have also been weighted to match the profile population of each country.

# Technical note

- Where figures do not add up to 100%, this is the result of computer rounding or multiple responses.
- An asterisk indicates a score less than 0.5%, but greater than zero.
- Where statistically significant differences occur between the total sample and those of a sub-group, these have been indicated by colour. Figures statistically lower than the average have been shaded **pink**, whereas figures higher than the average have been shaded **green**.
- Any sub-group differences mentioned in the commentary of the report are **statistically significant**, unless specified otherwise.
- A full explanation of statistical significance has been provided in the appendices to this report. Please refer to the full data tables for a detailed breakdown of significant differences between the overall sample and sub-group samples, and between individual sub-group samples.

# Environmental issues and transparency



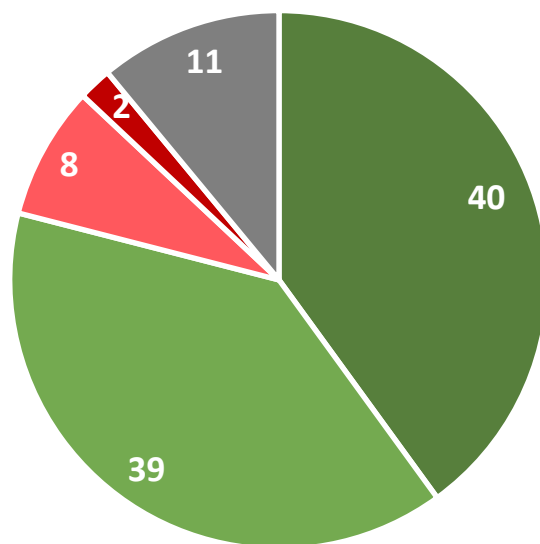
Four in five (79%) think it is important that clothing brands provide information on their environmental commitments

Seven in ten (70%) feel the names and locations of factories used in the clothing supply chain should be disclosed

Q.13 How important, or not, do you think it is that clothing brands should provide information on the following?

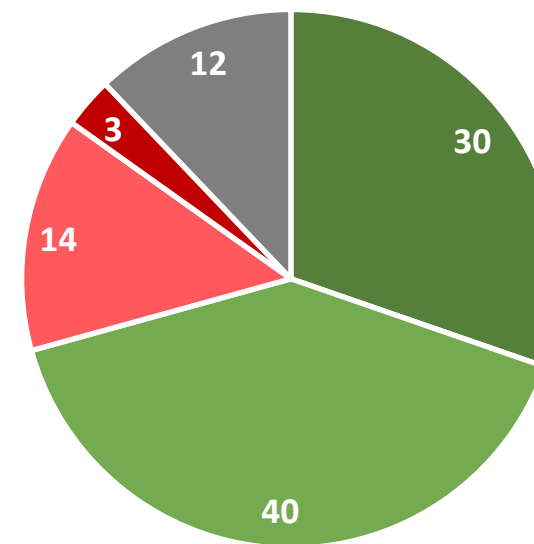
■ % Very important    ■ % Somewhat important    ■ % Not very important    ■ % Not at all important    ■ % Don't know

**Their environmental commitments and measures they are taking to help minimise the pollution in their supply chain**



Important	79%
Not important	10%

**The names and location of the factories they use throughout their supply chain**

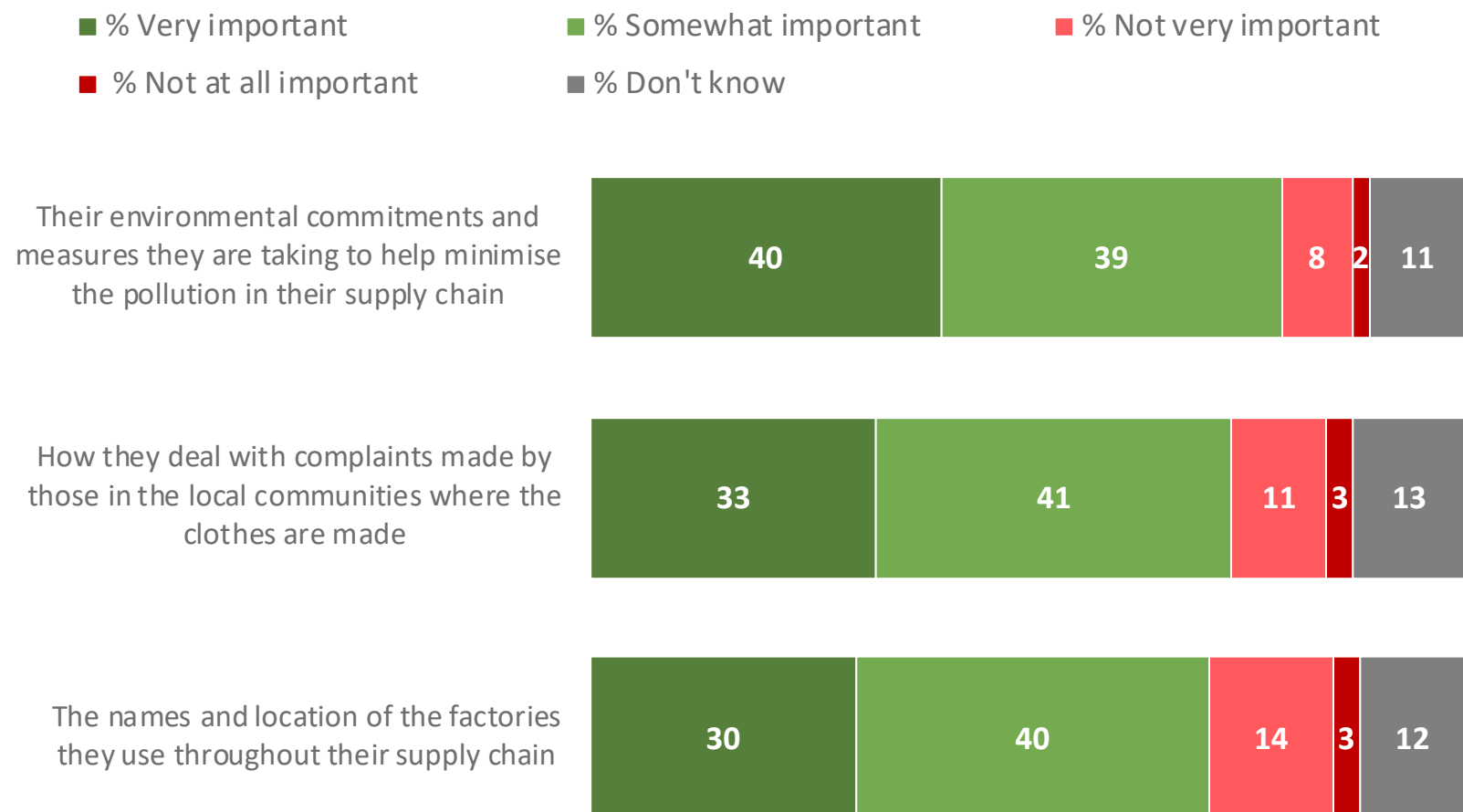


Important	70%
Not important	18%

## Four in five (79%) think clothing brands should provide information on their environmental commitments

Spanish and Italian consumers are more likely than average to think this. Three quarters feel brands should disclose how they deal with complaints made by communities where clothes are made (74%) – with those in Spain and the USA feeling particularly strongly about this. Seven in ten feel the names and locations of factories used in their clothing supply chain should be provided.

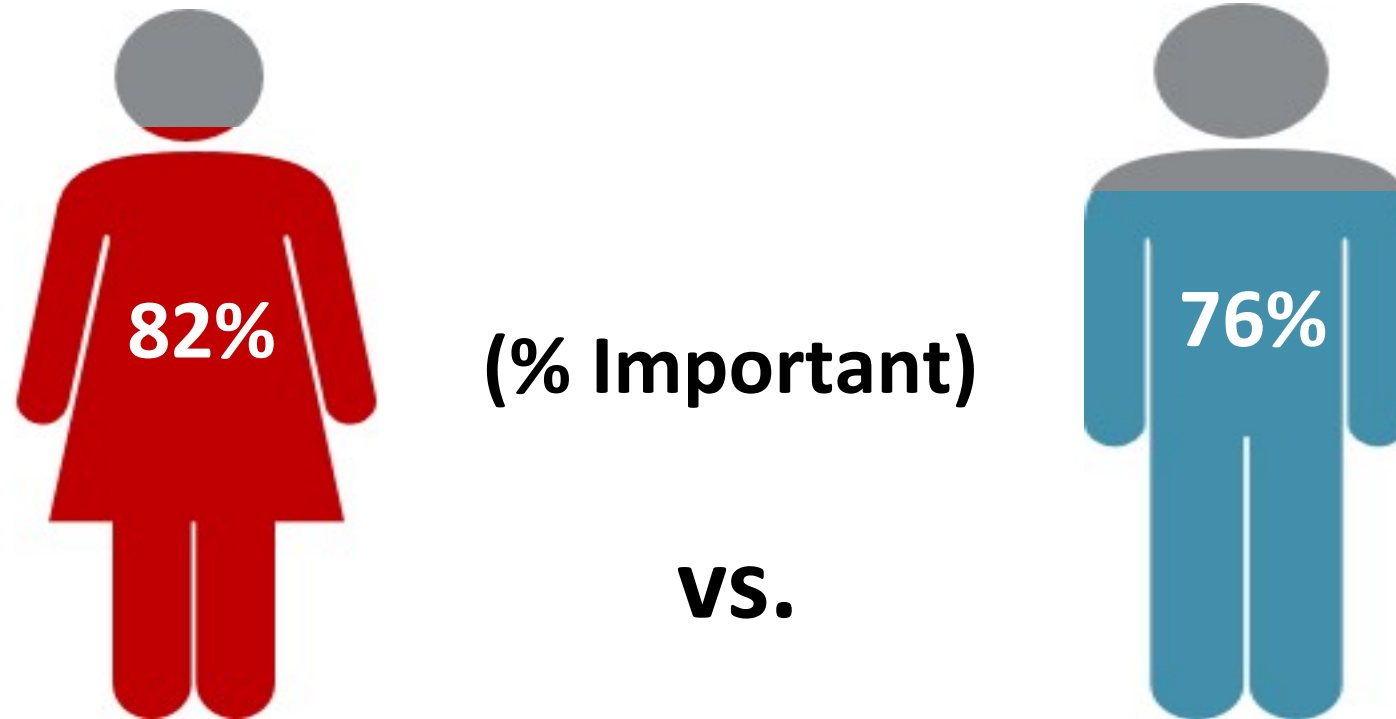
Q.13 How important, or not, do you think it is that clothing brands should provide information on the following?



Total	% important						
	Poland	France	Italy	Germany	Spain	USA	UK
79%	72%	80%	82%	79%	82%	79%	79%
74%	69%	76%	75%	67%	78%	77%	75%
70%	65%	75%	75%	66%	74%	70%	67%

Over four in five female shoppers (82%) deem it important that brands provide information on their environmental commitments and measures they are taking to minimise pollution in their supply chain

Q.13 How important, or not, do you think it is that clothing brands should provide information on the following?

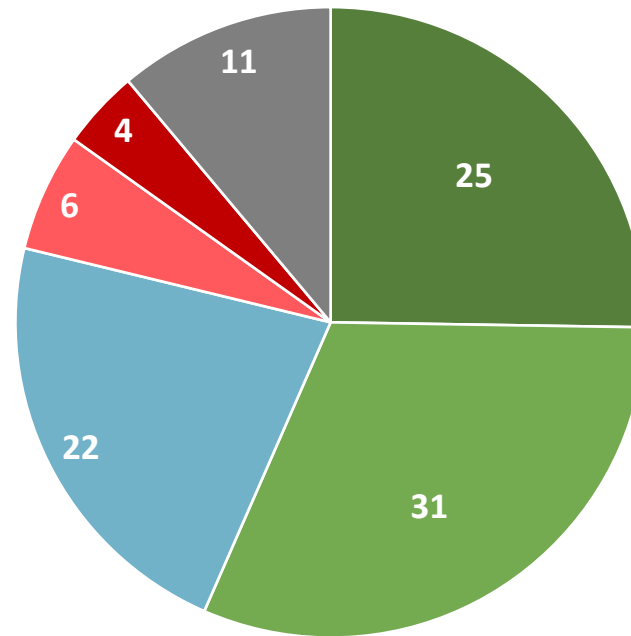


*“Their environmental commitments and measure they are taking to minimise pollution in their supply chain”*

# The majority of consumers (56%) would be put off buying from a brand that was associated with pollution in its manufacturing processes

Q.9 How likely or unlikely would the following things be to put you off buying clothing from a brand that you currently buy from?  
If the clothing brand was associated with environmental pollution in its manufacturing processes

■ % Very likely   ■ % Fairly likely   ■ % Neither/nor   ■ % Fairly unlikely   ■ % Very unlikely   ■ % Don't know



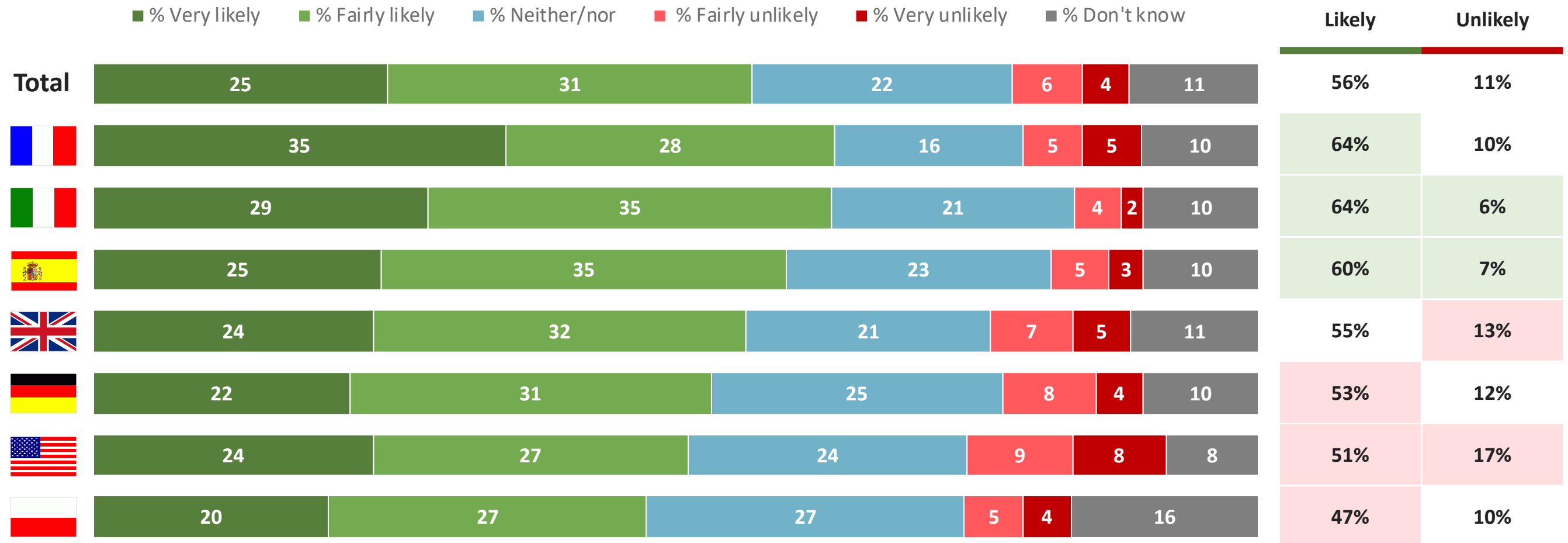
Likely	56%
Unlikely	11%



# The majority of consumers (56%) would be put off buying from a brand that was associated with pollution in its manufacturing processes

Those in France, Italy and Spain would be significantly more likely than the average to say this – while those in Germany, USA and Poland are less likely.

Q.9 How likely or unlikely would the following things be to put you off buying clothing from a brand that you currently buy from?  
If the clothing brand was associated with environmental pollution in its manufacturing processes

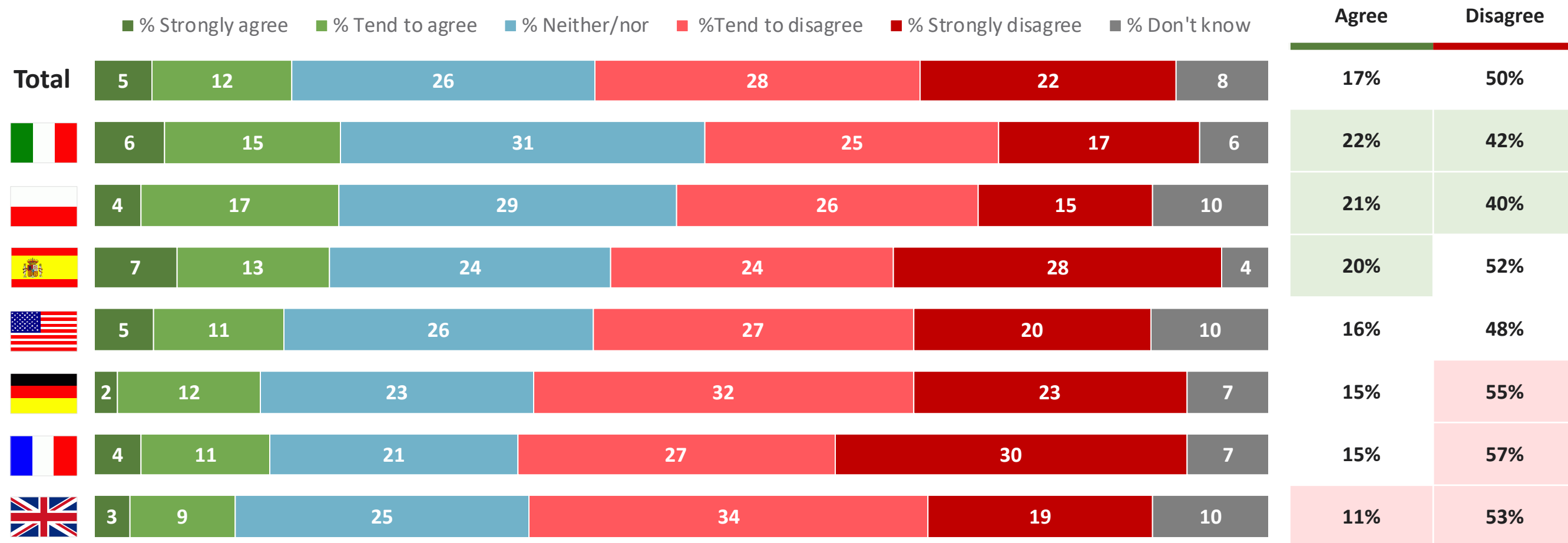


## Less than one in five feel informed about the fashion industry's environmental and social impacts

Overall, 17% feel informed about the impacts of clothing manufacturing on the environment and societies. Those in Italy, Poland and Spain are more likely than the average to feel informed. Consumers in the UK, France & Germany are more likely to disagree that the fashion industry keeps consumers informed.

Q.3 To what extent do you agree or disagree with the following statement?

The fashion industry informs consumers about the environmental and social impacts of the manufacturing of their clothes



Ipsos Public Affairs

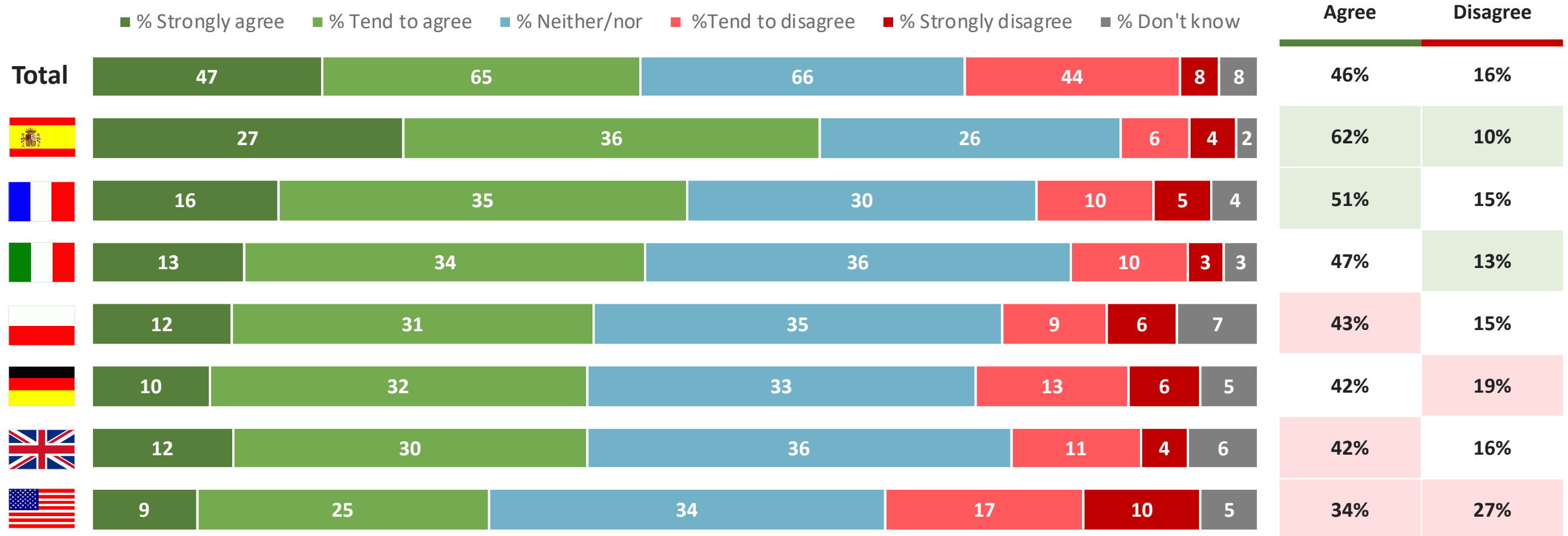
Base: All adults aged 16-75 in Poland (1109), France (1100), Italy (1076), Germany (1093), Spain (1089), USA (1117) and the UK (1117). Fieldwork dates: 19th – 26th October 2018

## Just under half are concerned about the environmental impacts of their clothing purchases

Overall, 46% of consumers feel that the manufacturing of the clothes they purchase is harming the environment. Concern is particularly high amongst Spanish consumers (62%) and the French (51%). Those in the USA, UK & Germany are all significantly less likely to say that they are concerned than the overall.

Q.3 To what extent do you agree or disagree with the following statement?

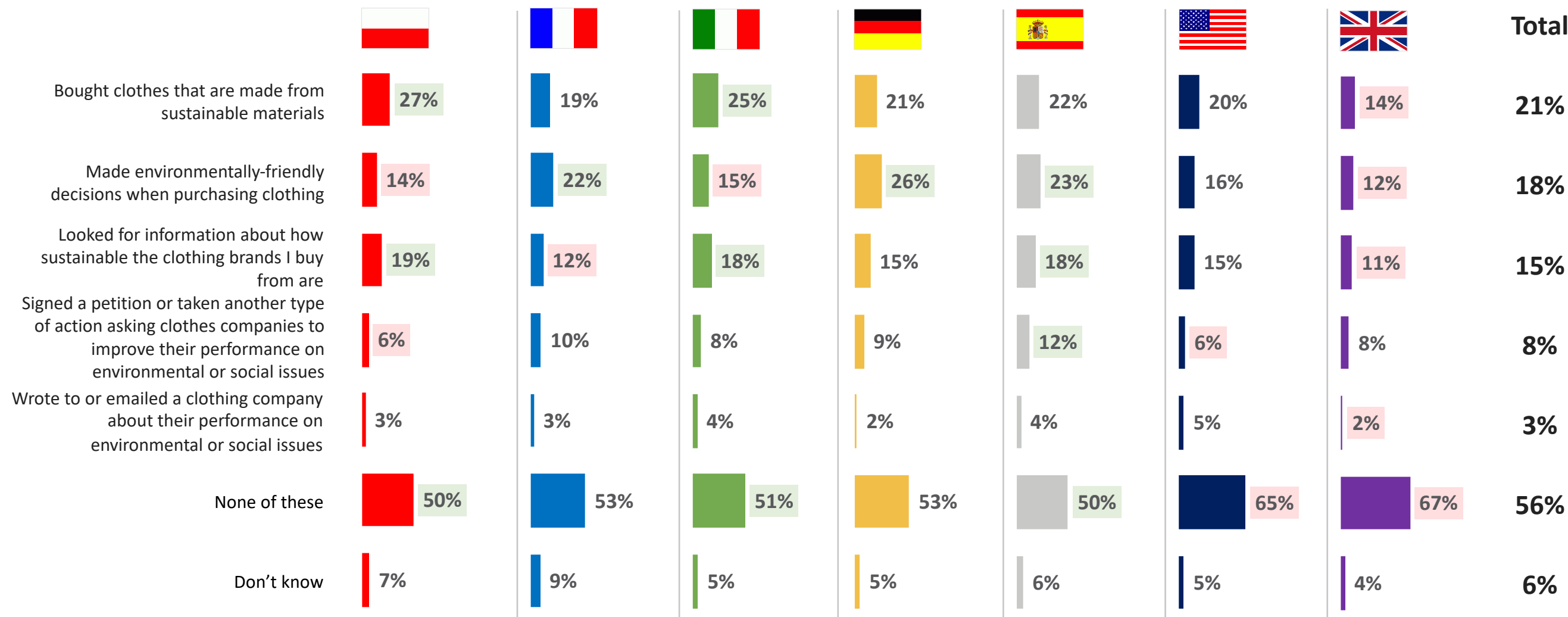
I am concerned that the manufacturing of clothes that I buy has a negative impact on the environment



## Two in five consumers have undertaken some form of sustainable action in the past year

We asked consumers whether they had done a range of sustainable actions in the past 12 months. 38% have done at least one of the actions listed below, while three in ten have made a sustainable purchasing decision. Italians are most likely to have bought clothes from sustainable materials, while those in the UK are less likely than average to have done all but one of the actions.

Q.4 Which of the following, if any, have you personally done in the past year?



## Perception of supply chain issues

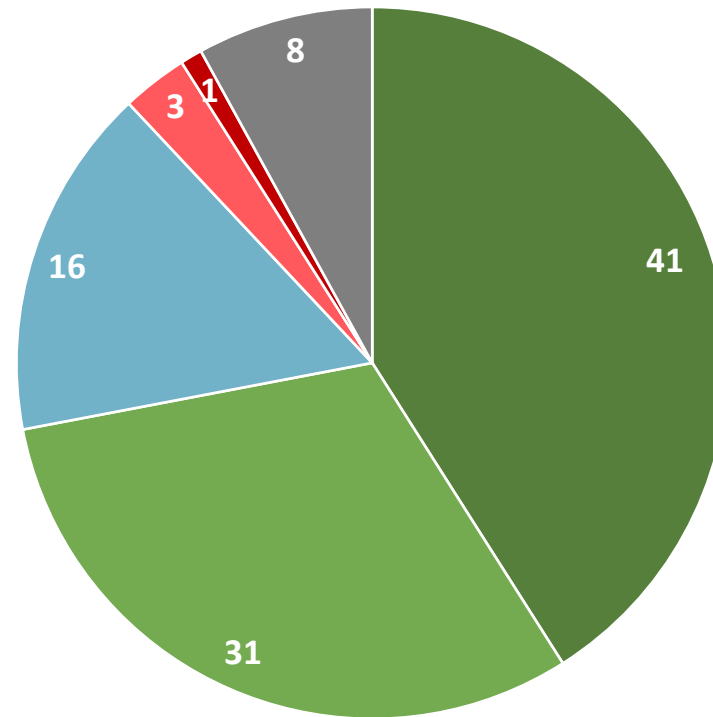
The focus here was on viscose supply chain, as this is one of the on-going campaigns by the Changing Markets Foundation

For more information visit: <https://changingmarkets.org/portfolio/dirty-fashion/>

# Close to three quarters (72%) of the public believe clothing brands should be responsible for what happens in their manufacturing processes

Q.12 To what extent do you agree or disagree with the following statements? Clothing brands should be responsible for what happens in their manufacturing processes and should take measures to ensure that the clothes are manufactured in an environmentally friendly way

■ % Strongly agree   ■ % Tend to agree   ■ % Neither/nor   ■ % Tend to disagree   ■ % Strongly disagree   ■ % Don't know

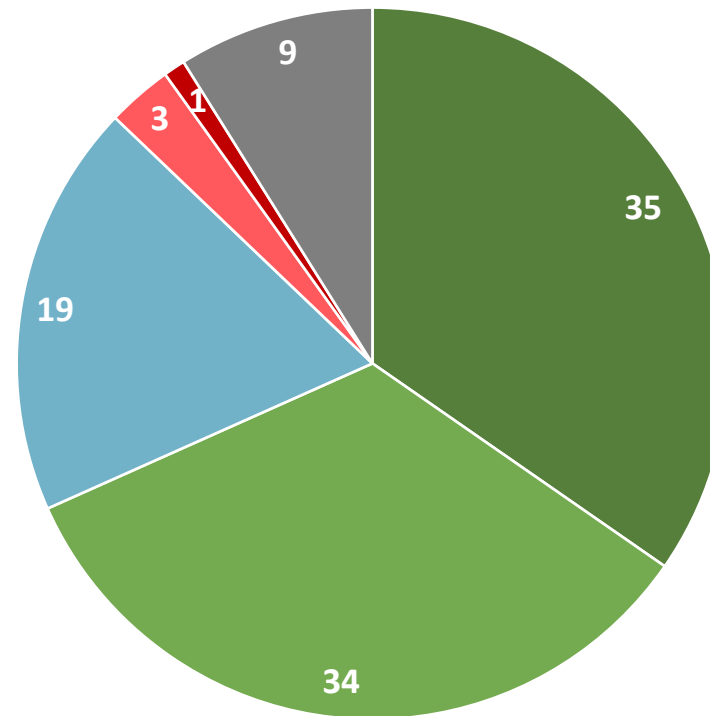


Agree	72%
Disagree	4%

# Seven in ten (68%) believe brands should have to provide information on their viscose manufacturers and how it affects the environment

Q.12 To what extent do you agree or disagree with the following statements? Clothing brands should have to provide information on their viscose manufacturers and how their production affects the environment

■ % Strongly agree   ■ % Tend to agree   ■ % Neither/nor   ■ % Tend to disagree   ■ % Strongly disagree   ■ % Don't know



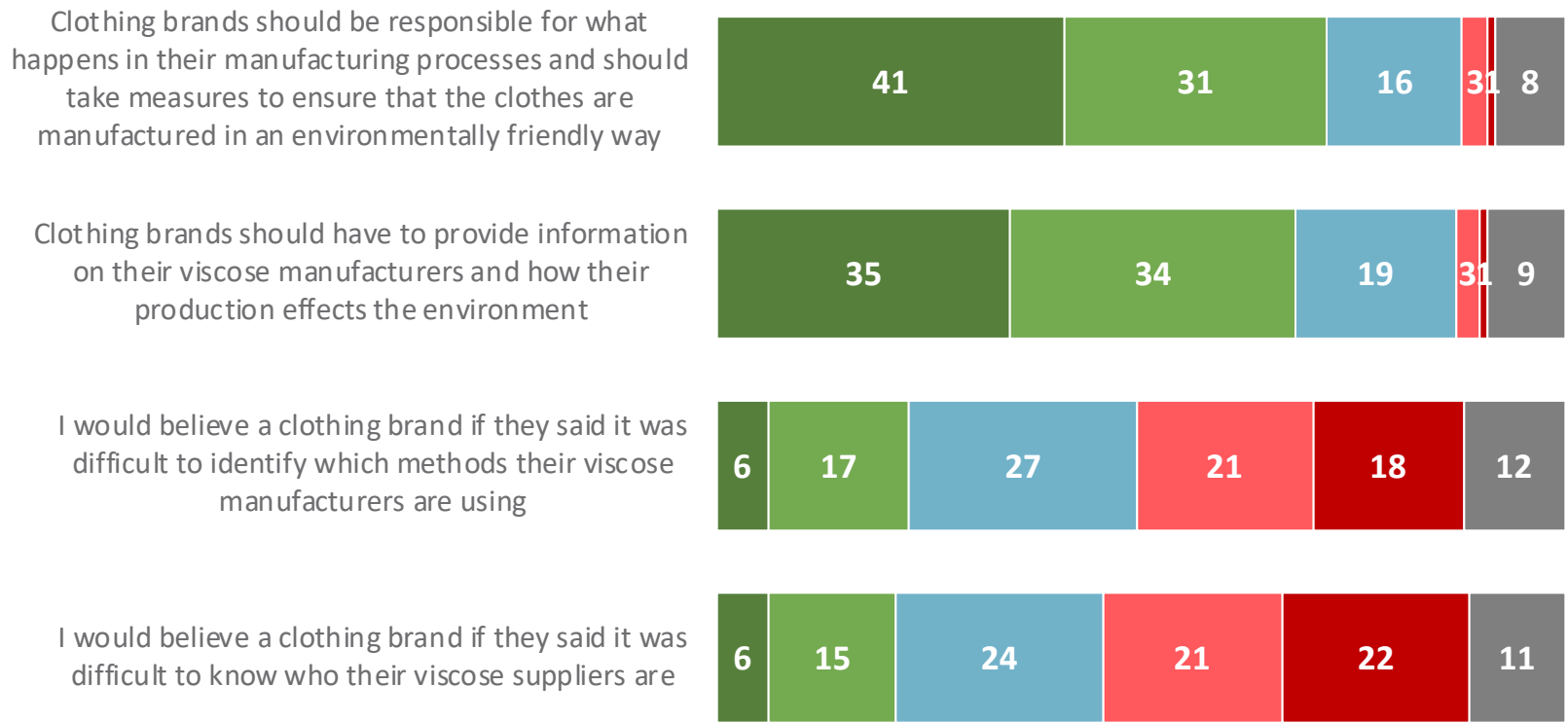
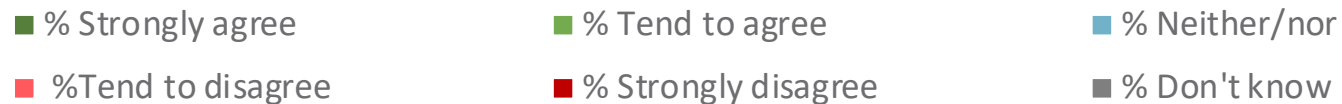
Agree	68%
Disagree	4%

# Consumers tend to feel brands should take responsibility for their viscose supply chain, and would be sceptical if brands

## were unable to disclose information about them

The majority in all countries feel clothing brands should be responsible for what happens in the manufacturing processes. A further seven in ten (68%) believe brands should have to provide information on their viscose supply and how it affects the environment. Less than a quarter (23%) say they would believe a brand if it said it was difficult to know the methods its viscose suppliers are using, and one in five (21%) would believe a brand if it said it was difficult to know who its suppliers of viscose are - those in the UK and Germany are more likely to be sceptical.

Q.12 To what extent do you agree or disagree with the following statements?



Total	% agree						
	Poland	France	Italy	Germany	Spain	USA	UK
72%	67%	75%	72%	71%	73%	73%	74%
68%	63%	72%	71%	69%	70%	66%	66%
23%	21%	25%	31%	17%	28%	24%	15%
21%	20%	21%	27%	15%	27%	22%	14%





## Workers rights

The focus here was on living wages and working conditions, as this is one of the on-going campaigns by the Clean Clothes Campaign

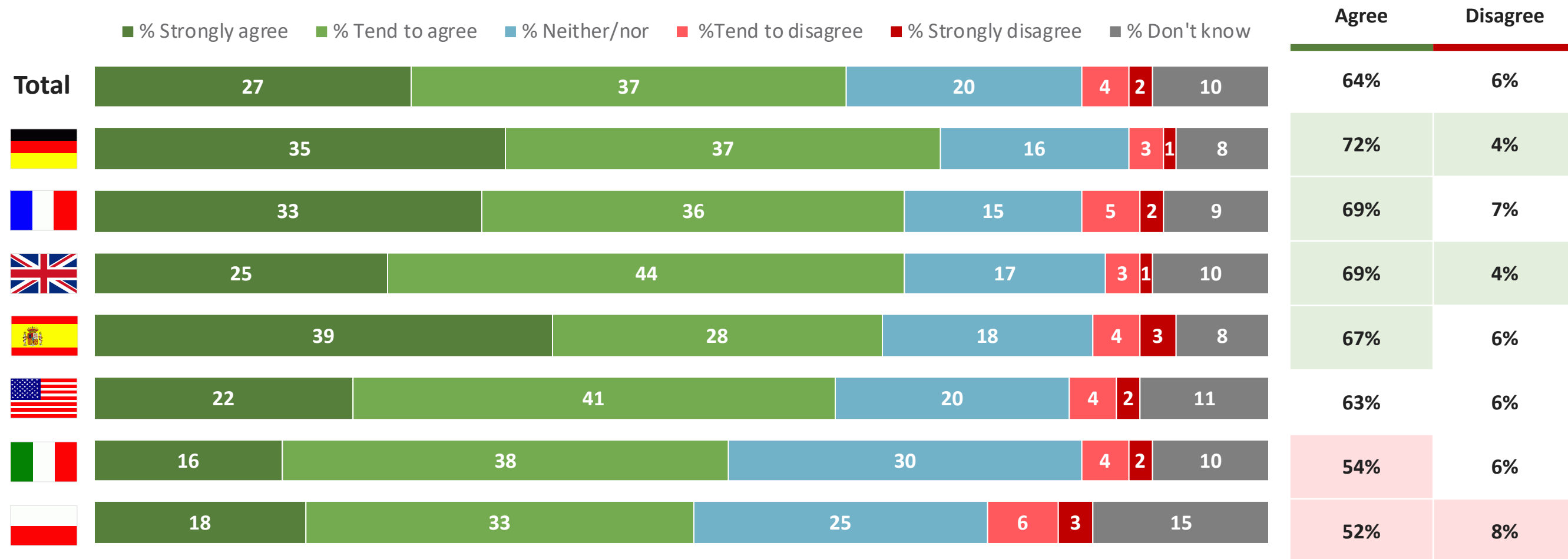
For more information visit: <https://cleanclothes.org/livingwage>

## The majority agree that the fashion industry generally pays factory workers low wages

Overall, two in three consumers (64%) agree that factory workers are paid low wages by the industry. Agreement is higher in Germany, France, Spain and the UK. While the majority still agree, Polish and Italian consumers are less likely than the average to feel this way about the wages of factory workers.

Q.3 To what extent do you agree or disagree with the following statement?

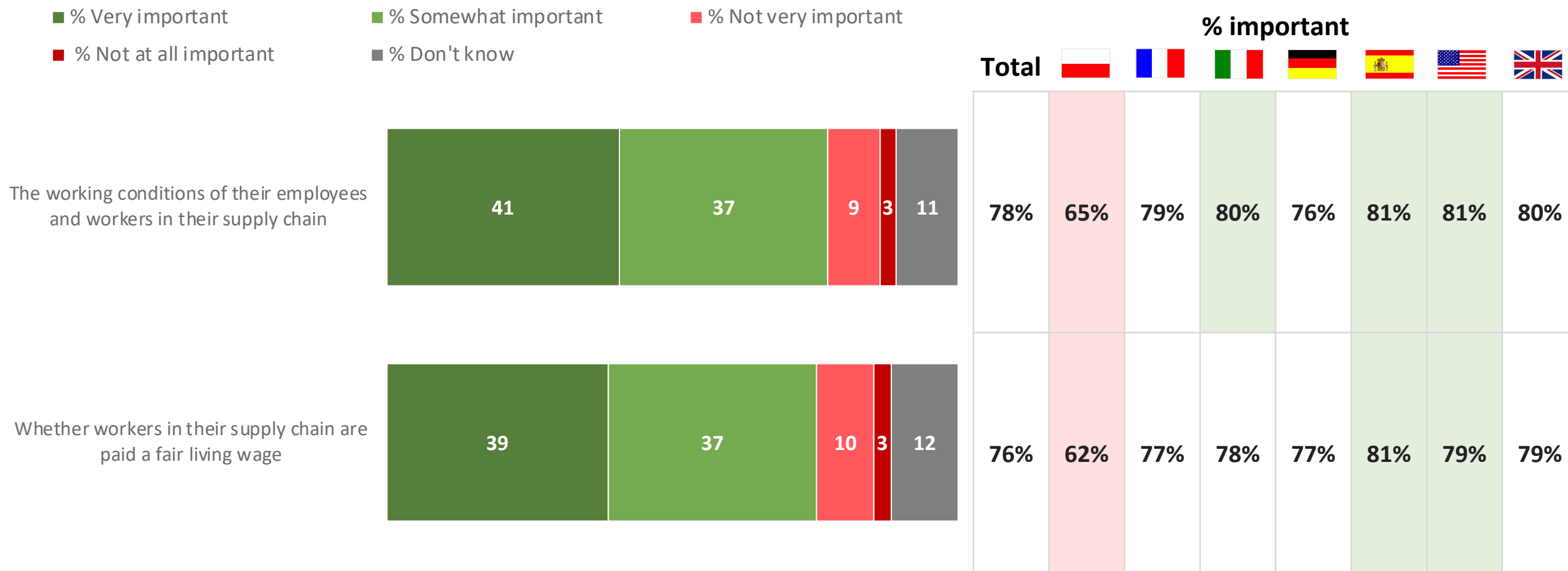
Generally, the fashion industry pays factory workers who make their clothing low wages



## Over three quarters feel brands should provide information on the working conditions of its employees

78% of consumers feel working conditions should be disclosed to the public – with those in Italy, Spain and USA all more likely than average to agree with this, while those in Poland are less likely. It is a similar story when it comes to whether a brand should disclose if its workers earn a fair living wage – 76% agree overall, with those in Spain and the US more likely to agree, and the Polish less so.

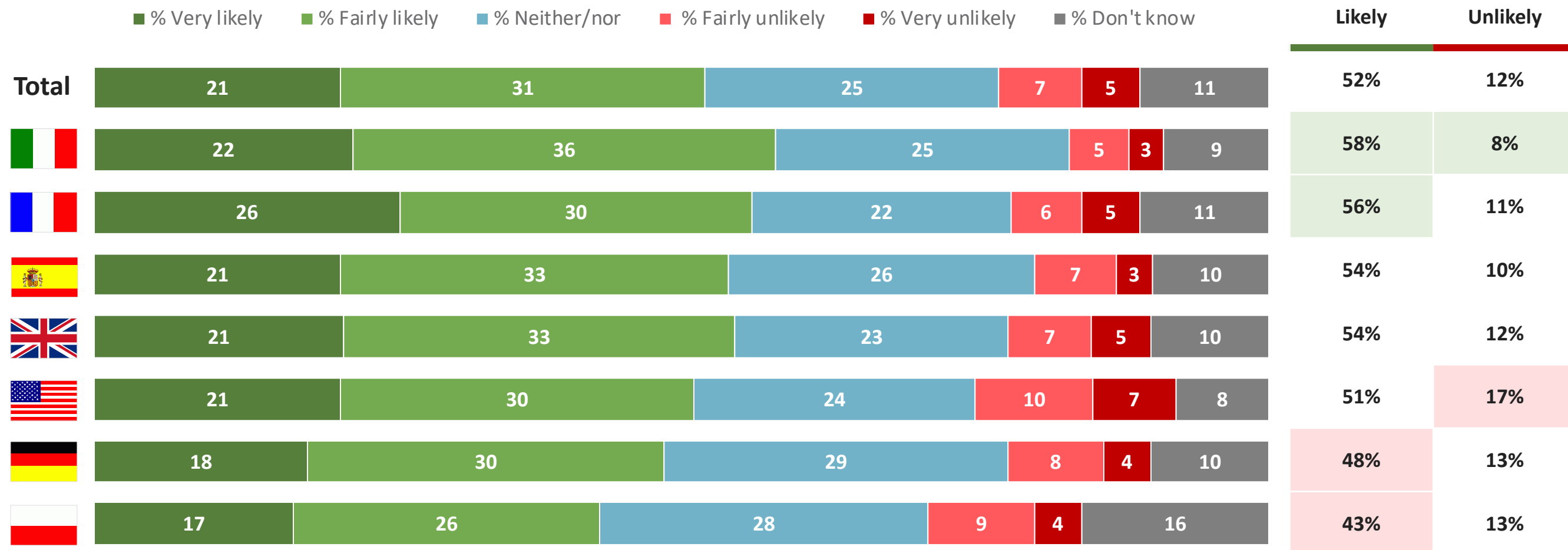
Q.13 How important, or not, do you think it is that clothing brands should provide information on the following?



## Around half (52%) would be put off if they found out brands were not paying factory workers a fair living wage

Other than in Germany and Poland, the majority across countries would be put off buying from a brand that doesn't pay factory workers a fair living wage. Italian and French consumers are more likely than average to say they would be put off.

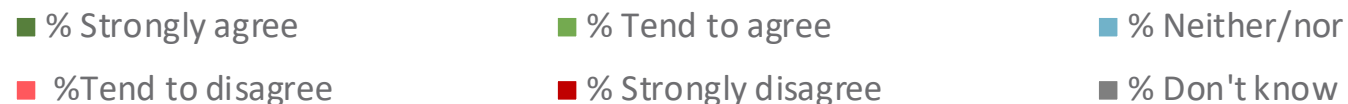
Q.9 How likely or unlikely would the following things be to put you off buying clothing from a brand that you currently buy from?  
If the clothing brand was not paying fair living wages to factory workers that make their clothing



## Three in five consumers would pay more for their clothes to allow factory workers a fair living wage

Three in five (62%) agree that they would pay 2-5% more for more expensive items of clothing, while just over half (51%) would pay 5-10% more for cheaper items if it meant factory employees were paid a fair living wage. Those in Germany are particularly likely to say they would happily pay more. Just over half (55%) also say that they would be more likely to buy clothes from companies that pay a fair living wage to employees, and would support their government if it demanded this be done in order to sell clothes in their country (62%).

Q.14 To what extent do you agree or disagree with the following statements?



I would support my government if they demanded that clothing brands have to pay its factory employees a fair living wage in order to sell clothes in this country



I would pay between 2-5% more for more expensive items of clothing, provided the company proves that it does pay workers with a fair living wage



I would be more likely to buy clothes from companies that pay a fair living wage for its employees, even if it means they are more expensive



I would pay between 5-10% more for cheaper items of clothing, provided the company proves that it does pay workers with a fair living wage



	% agree						
Total	Poland	France	Italy	Germany	Spain	USA	UK
I would support my government if they demanded that clothing brands have to pay its factory employees a fair living wage in order to sell clothes in this country	62%	53%	66%	64%	58%	67%	60%
I would pay between 2-5% more for more expensive items of clothing, provided the company proves that it does pay workers with a fair living wage	58%	47%	61%	56%	66%	58%	60%
I would be more likely to buy clothes from companies that pay a fair living wage for its employees, even if it means they are more expensive	55%	46%	60%	53%	61%	56%	53%
I would pay between 5-10% more for cheaper items of clothing, provided the company proves that it does pay workers with a fair living wage	51%	42%	52%	50%	58%	55%	53%

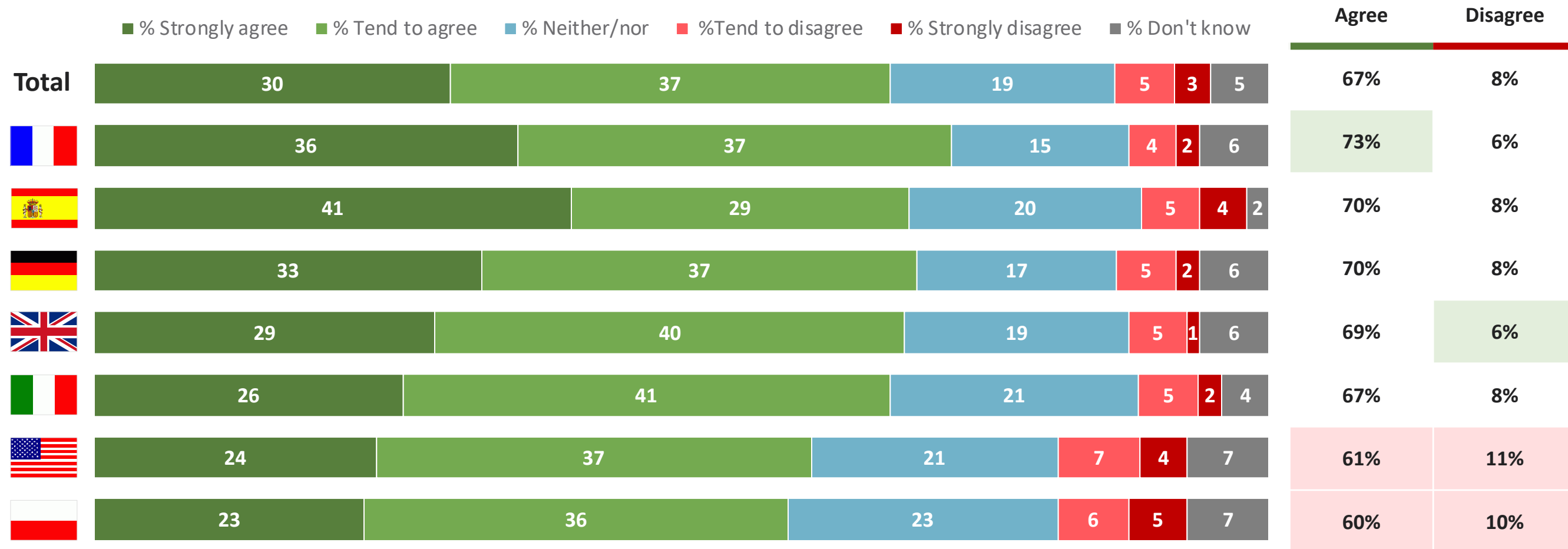
# Lack of trust in brands

## The majority say they find it difficult to know which brands meet higher ethical standards

Around two thirds of consumers (67%) find it difficult to know which clothing brands or companies meet higher ethical standards – those in France are particularly likely to say this (73% vs. 67% overall), while US consumers perceive themselves to be more knowledgeable.

Q.3 To what extent do you agree or disagree with the following statement?

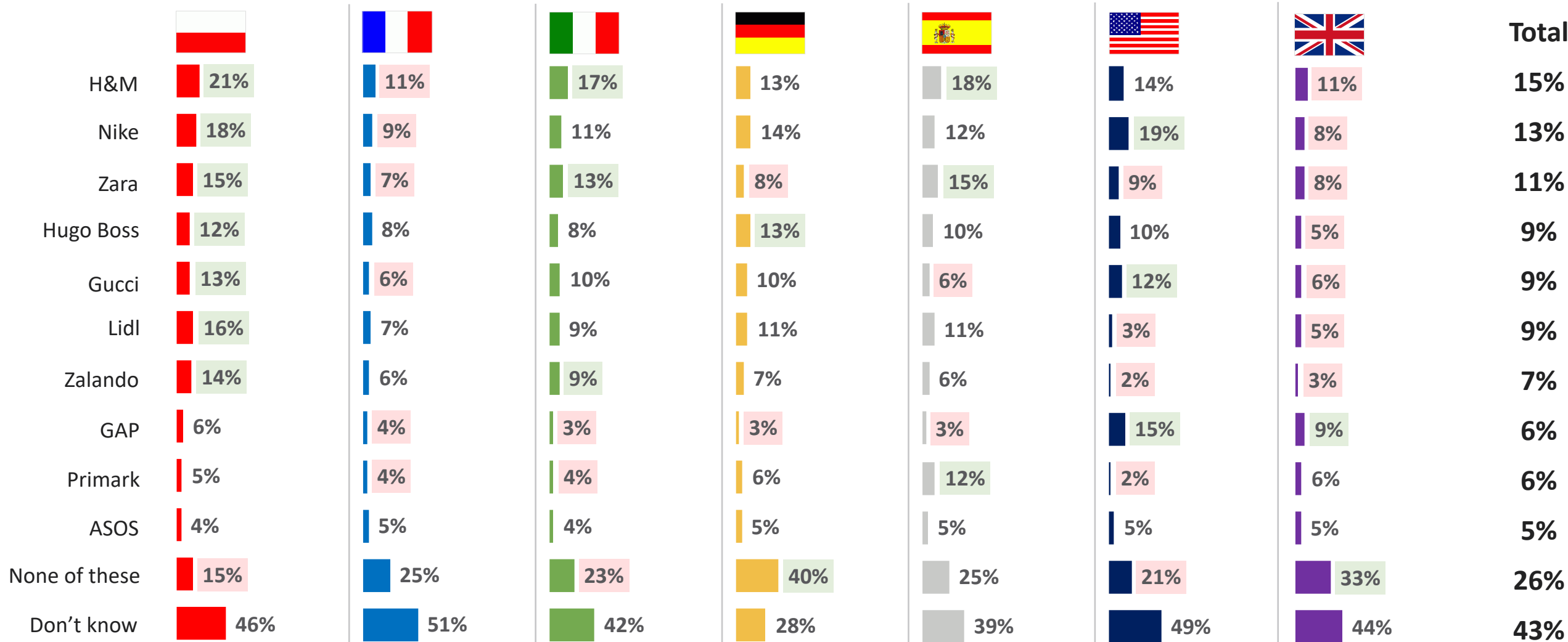
I generally find it difficult to know which clothing brands or companies meet higher ethical standards



## Around two in five do not know if any of the brands listed are associated with a sustainable supply chain

As seen previously, consumers generally find it difficult to know how ethical brands they buy from are – and this rings true when asked about a selection of major clothing companies. H&M generally comes out as top across most countries, closely followed by Nike. However, the margins between perceptions of brands are small, and a quarter (26%) do not think any of these brands have a sustainable supply chain.

Q.7 Which, if any, of the following fashion brands or shops do you associate with having a sustainable supply chain?

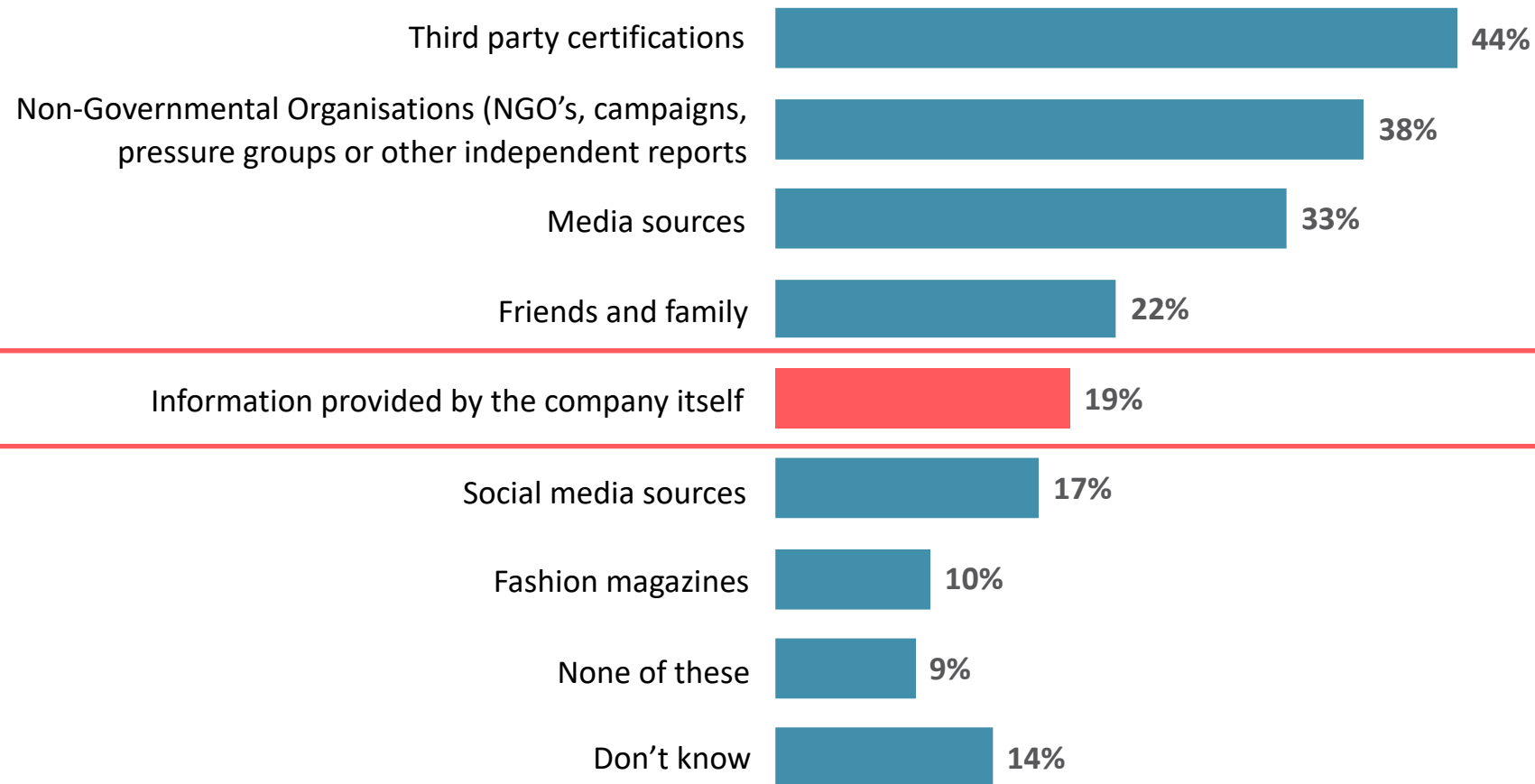


Base: All adults aged 16-75 (7701), n Poland (1109), France (1100), Italy (1076), Germany (1093), Spain (1089), USA (1117) and the UK (1117). Fieldwork dates: 19th – 26th October 2018



# Less than one in five (19%) find information provided by the company itself as the most trusted source of information about how sustainable a clothing brand is

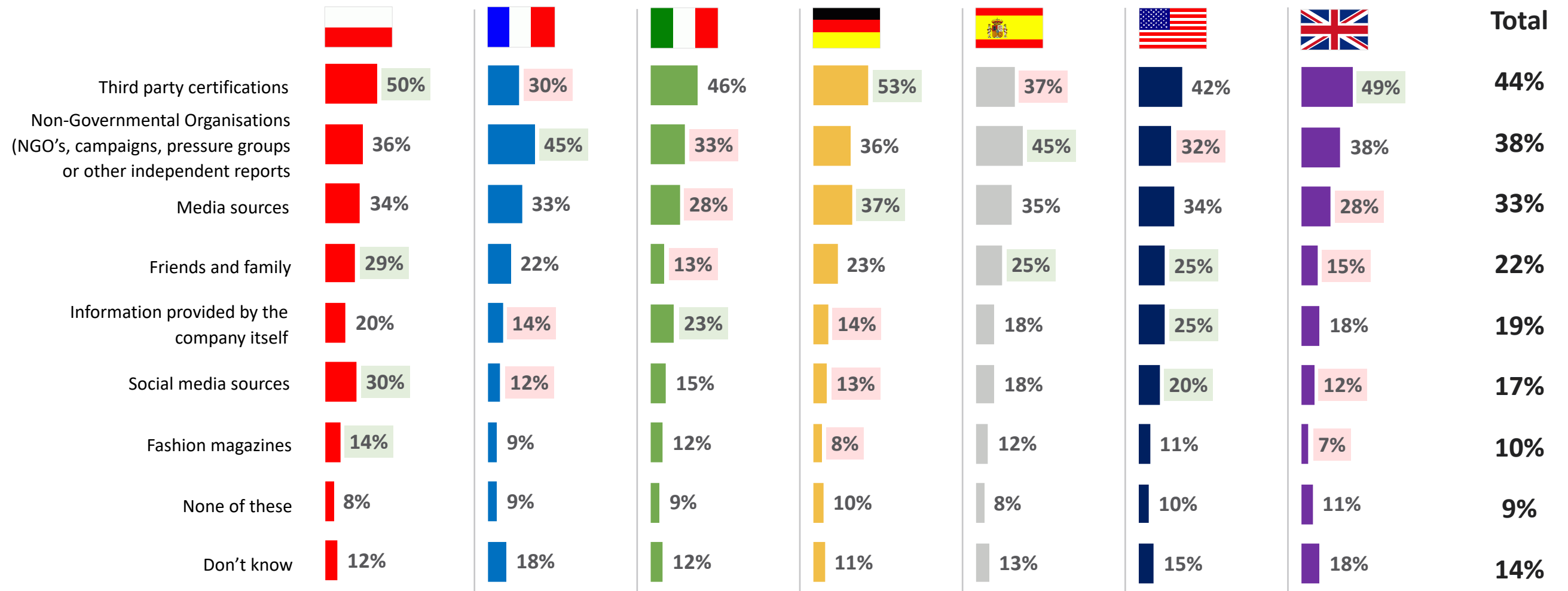
Q.10 Which sources of information, if any, would you trust if you wanted to find out how sustainable a clothing brand is?



# Less than one in five (19%) find information provided by the company itself as the most trusted source of information about how sustainable a clothing brand is

Those in Germany, Poland and the UK are more likely to trust third party certifications, whereas the French and Spanish are more likely to choose NGO's / campaigns and pressure groups.

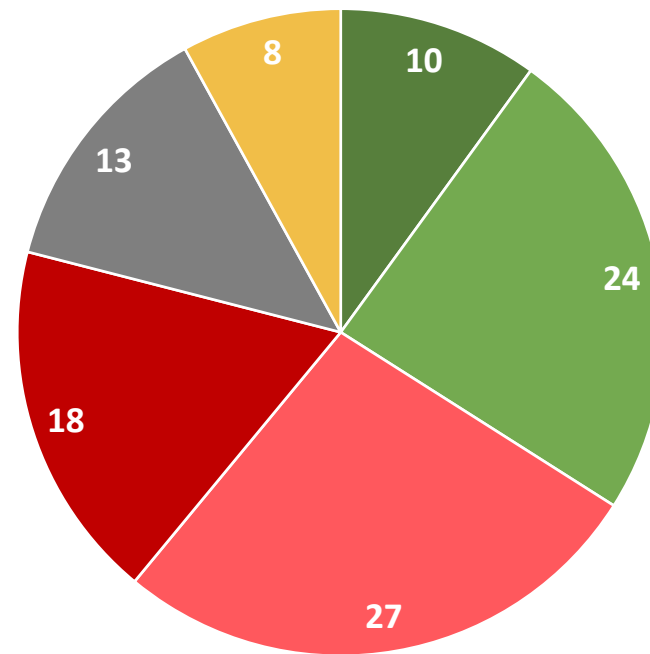
Q.10 Which sources of information, if any, would you trust if you wanted to find out how sustainable a clothing brand is?



# Only a third (34%) consider the fashion industry self-regulating to be effective in improving environmental impacts

Q.8 How effective, or not, do you think each of the following are at improving the impact that the fashion industry has on the environment?

■ % Very effective   ■ % Fairly effective   ■ % Not very effective   ■ % Not very effective   ■ % Don't know   ■ % No opinion



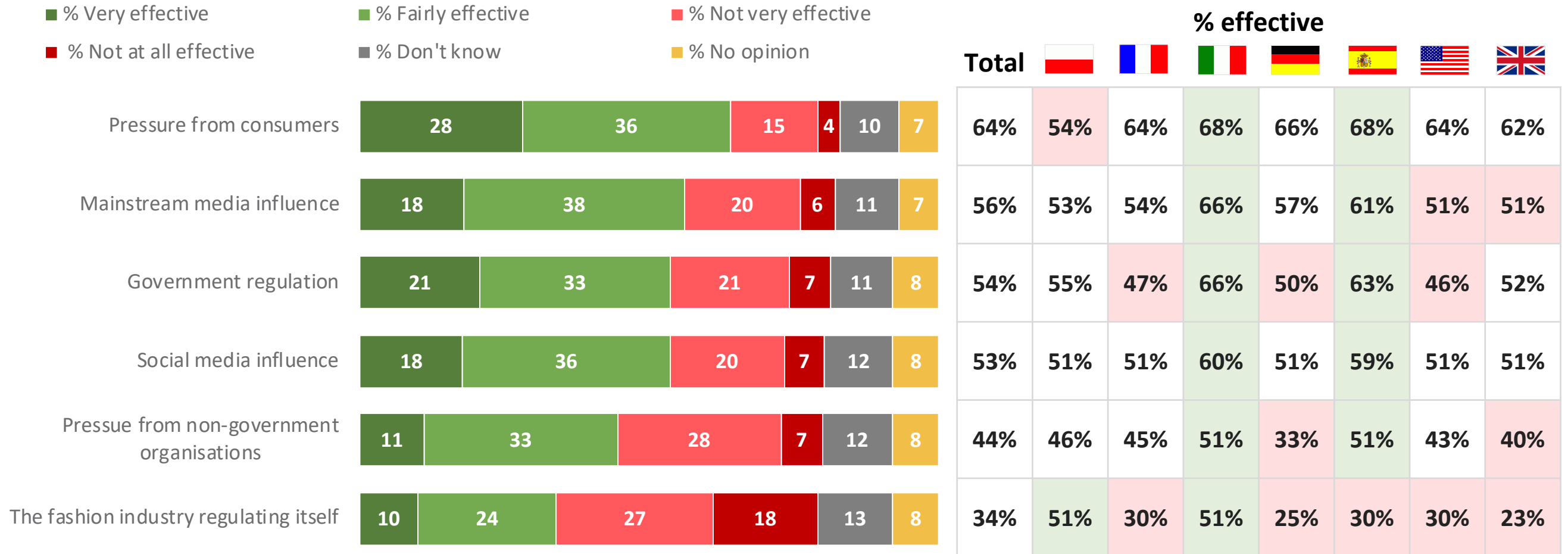
*“The fashion industry regulating itself”*

Effective	34%
Not effective	45%

# A majority find consumer pressure (64%) and government regulation (54%) as more effective ways in improving environmental impacts

This sentiment is seen across most countries, with the exception of Italy and Poland. In contrast, two thirds across all those surveyed (64%) consider consumer pressure to be the most effective way of improving the impact the fashion industry has on the environment.

Q.8 How effective, or not, do you think each of the following are at improving the impact that the fashion industry has on the environment?



# Appendix.



# Demographics

Total



		Total	Poland	France	Italy	Germany	Spain	USA	UK
Gender	Male	49%	49%	49%	50%	50%	50%	49%	50%
	Female	51%	51%	51%	50%	50%	50%	51%	50%
Age	16-24 years	14%	15%	15%	13%	14%	13%	15%	16%
	25-34 years	18%	21%	17%	16%	18%	19%	19%	18%
	35-44 years	19%	18%	18%	21%	17%	25%	17%	18%
	45-54 years	20%	17%	19%	23%	23%	23%	18%	19%
	55-75 years	28%	29%	31%	28%	28%	19%	31%	29%
Working status	Working	61%	69%	57%	52%	67%	57%	66%	59%
	Not working	39%	31%	43%	48%	33%	43%	34%	41%

# Guide to statistical reliability

The public who took part in the survey are only a sample of the total "population" of all seven countries, so we cannot be certain that the figures obtained are exactly those that would have been reached if everyone had responded (the "true" values). We can, however, predict the variation between the sample results and the "true" values from knowledge of the size of the samples on which the results to each question is based, and the number of times a particular answer is given.

The confidence with which we can make this prediction is usually chosen to be 95% - that is, the chances are 95 in 100 that the "true" value will fall within a specified range. The following illustrates the predicted ranges for different sample sizes and percentage results at the "95% confidence interval":

Size of sample in the survey	Approximate sampling tolerances applicable to percentages at or near these level		
	10% or 90%	50%	30% or 70%
1,087 responses (Italy)	1.8	3.0	2.7
7,701 responses (Overall)	0.7	1.1	1.00

For example, with a sample size of 7,701 where 30% give a particular answer, the chances are, 19 in 20 that the "true" value (i.e. the one which would have been obtained if the whole population had been interviewed) will fall within the range of  $\pm 1.0$  percentage points from the survey result (i.e. between 29% and 31%.)

# Guide to statistical reliability (cont...)

When results are compared between separate groups within a sample (e.g. males versus females), different results may be obtained. The difference may be "real," or it may occur by chance (because not everyone in the population has been interviewed). To test if the difference is a real one - i.e. if it is "statistically significant" - we again have to know the size of the samples, the percentage giving a certain answer and the degree of confidence chosen.

If we once again assume a "95% confidence interval", the differences between the results of two separate groups must be greater than the values given in the following table, using males and females in this sample as an example:

Size of sample on which survey result is based	Differences required for significance at or near these percentage levels		
	10% or 90% ±	30% or 70% ±	50% ±
500 vs. 500	3.7	5.7	6.2
1,000 vs. 1,000	2.6	4.00	4.4
3,812 vs. 3,889	1.3	2.00	2.2



# Ipsos MORI's standards and accreditations

Ipsos MORI's standards and accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



## ISO 20252:2012

The international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos MORI was the first company in the world to gain this accreditation.



## MRS Company Partnership

By being an MRS Company Partner, Ipsos MORI endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation.



## ISO 9001:2008

International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



## ISO 27001:2005

International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos MORI was the first research company in the UK to be awarded this in August 2008.

## Data Protection Act

Ipsos MORI is required to comply with the Data Protection Act; it covers the processing of personal data and the protection of privacy

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**This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos MORI Terms and Conditions.**



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