

The Fashion Fix

Issue 2

The paradox of fashion,
can fast ever slow down?



**What people
think, feel
and do**

Introduction

We're excited to introduce the second issue of our 'Fashion Fix' thought leadership, as the latest addition to **Opinium's Sustainability Series**.

This year sees an evolution of the original 'Fashion Fix' study that ran in 2019 – repeating a number of core measures from that study, in order to track shifts over time. Along with deep dives into new topic areas, which unveil answers to questions hot in the mind of many fashion retailers today:

Are consumers choosing to shop for clothing sustainably?

What does shopping sustainably mean to them?

Are they willing to pay more for sustainable clothing?

Where do they go when researching and shopping for sustainable clothing?

Before we jump into the latest results, let's recap on the key findings from the previous study, in terms of what consumers are looking for retailers to do:

Educate and lead the way

Consumers are confused about this topic and their main sources of knowledge are the news or social media. Getting ahead of this and setting the agenda will help raise retailers' profile in what is really an eventuality – make a positive name for your brand.

Provide transparency

#whomademyclothes has already gained great traction and signs are that this movement is only likely to continue. Where possible, providing visibility of the social and environmental impact of retailers' products will be the greatest influencer on perceptions.

Offer consumer friendly solutions

There is openness to the new 'sustainable' initiatives being launched across the industry, however it is important barriers to these are known and overcome to generate the strength of motivation required for true behaviour change.

Covid-19 has caused a divide in environmental concerns

When we sat down to write the first round of 'The Fashion Fix' in 2019*, with the best intentions to repeat this on an annual basis, I think it is fair to say that not one of us could have anticipated the world we would be living in a year later. And so, as we are making our way out the other side of the Covid-19 pandemic, we were keen to take stock of how the pandemic has impacted Brits' feelings towards the environment and their fashion buying habits.

Whilst concern for the environment has edged forward (74% vs 71% in 2019), consumers are undecided as to whether Covid-19 has some responsibility in the deterioration of our environmental stability. 43% of adults are more concerned about the environment as a result of the pandemic, whilst 52% feel it has had no impact.



43%

of adults are more concerned about the environment as a result of the pandemic.

The reasons as to why people are more likely to be concerned are threefold:

"A lot more plastic waste from masks, gloves and PPE"

The increased waste from masks, PPE etc

"Amount of waste produced and masks littering countryside and waterways"

"It became more apparent with the decreased pollution levels over lockdown and how much it rose again when things opened back up that it really hit home how badly we have treated the environment"

The rise in carbon emissions, again, post lockdown

"After a lull in carbon output during lockdowns our carbon output had increased to a higher level than pre-pandemic"

"Because a lot of the green efforts like reusing and recycling have been dropped in concerns over contamination"

The perception that the Government's focus has been elsewhere

"Because concerns for the economy seem to be at the fore at the moment which usually relegates the environmental issues"

SUSTAINABLE FASHION:

Awareness and behaviours

Recovery will take time

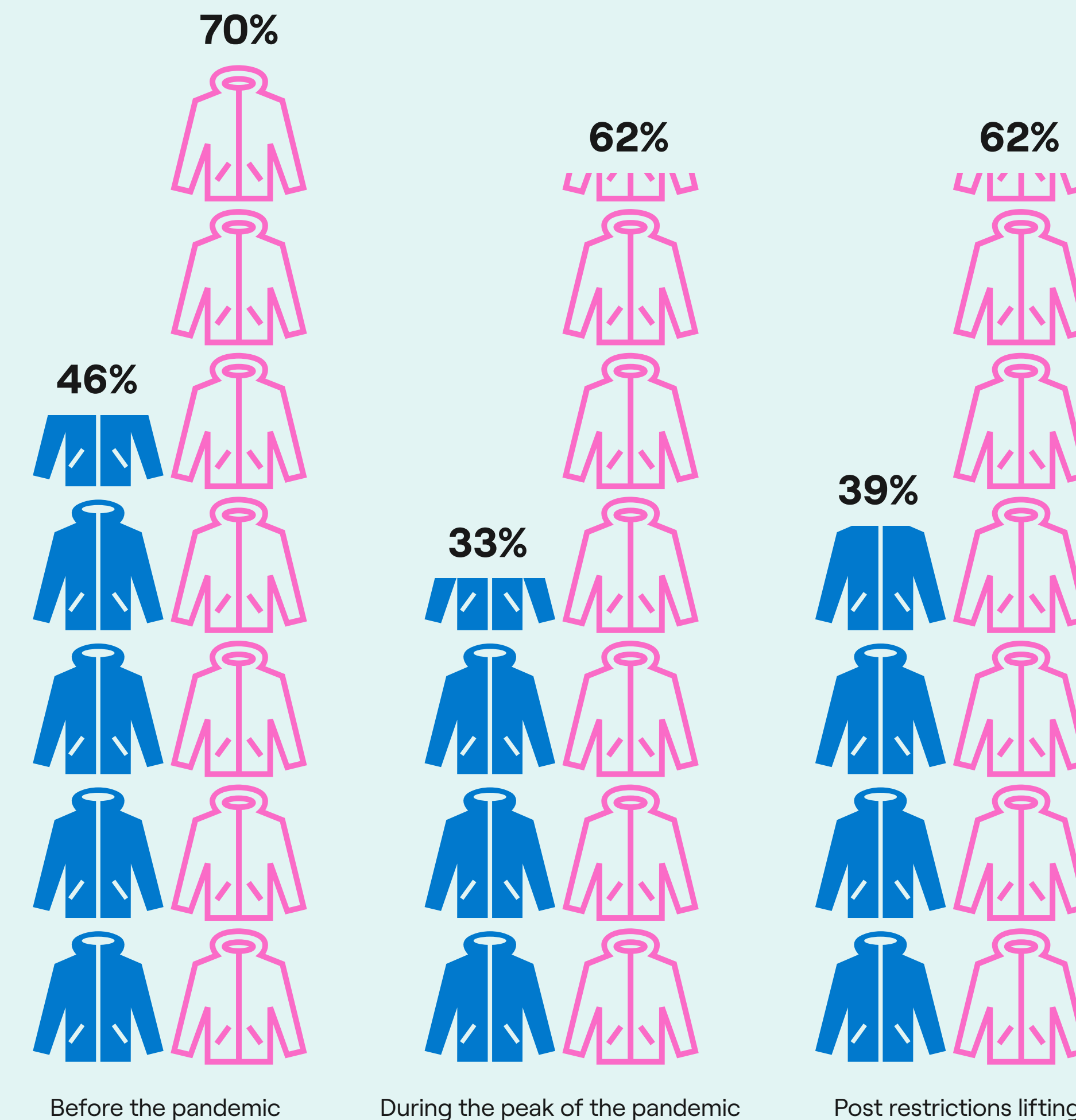
Constrained to our homes with no real reason to change out of our loungewear in the last 18 months, apart from the heavily scheduled zoom get togethers, it is perhaps unsurprising to see that there was a reduction in shopping for fashion items. Yet for many, these levels are yet to return to what they were in a world pre-covid.

Many are instead excited about having the chance to wear the old clothing they haven't had opportunity to wear again (52%). Which is great from a sustainability perspective! But will mean that any recovery in fashion sales may take some time; few claim they are likely to spend more on fashion items now things are opening up again (24%) and an even greater number no longer see the value in spending lots of money on fashion items (58%).

Even if sales do return to normal, the types of clothing being purchased are likely to continue to meet our more causal needs; 44% disagree that they will be wearing less casual clothing going forwards and 50% disagree that they will need to start buying more work appropriate clothing.

Shop for fashion items
at least once a month:

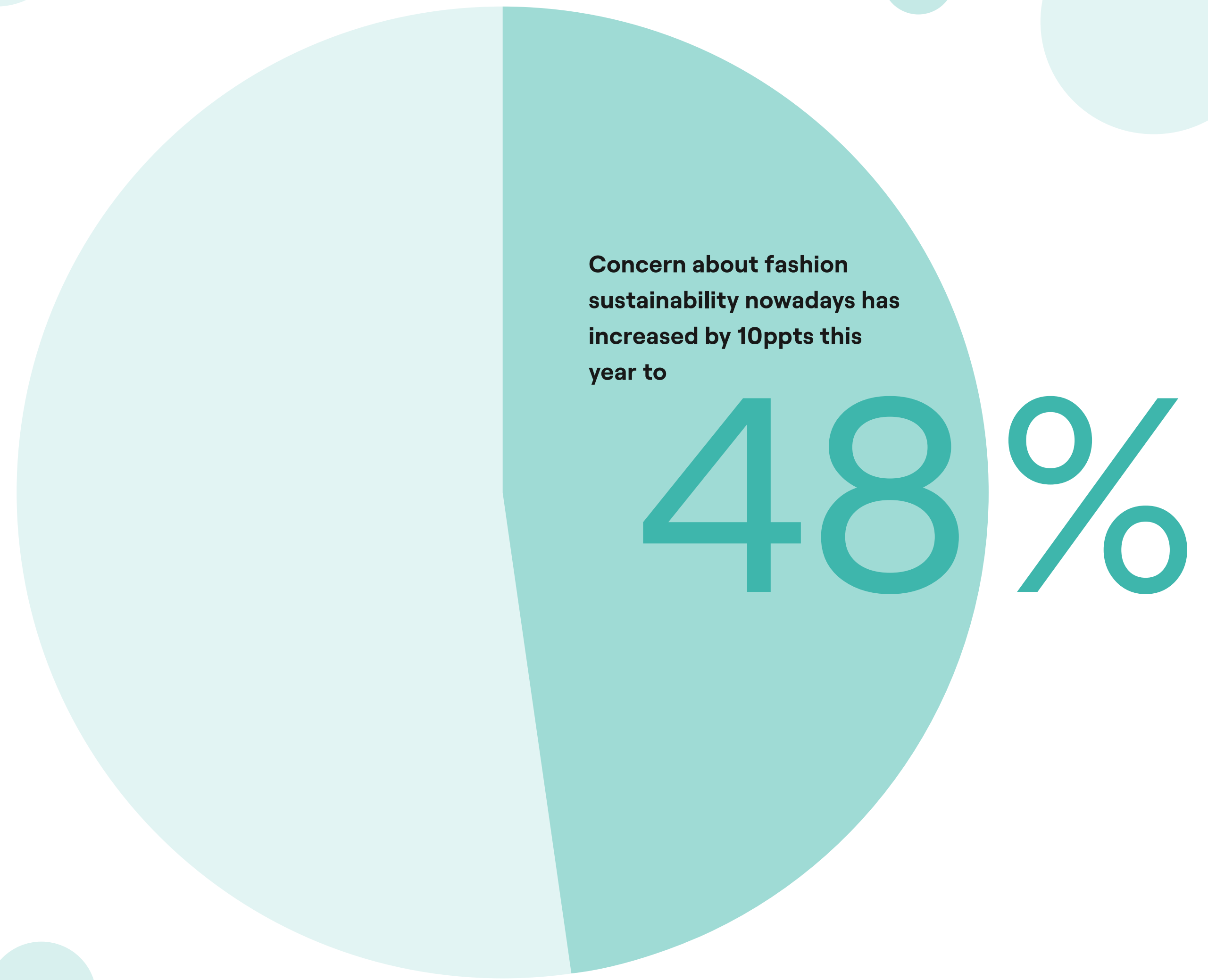
 UK Adults
 18-24-year-olds



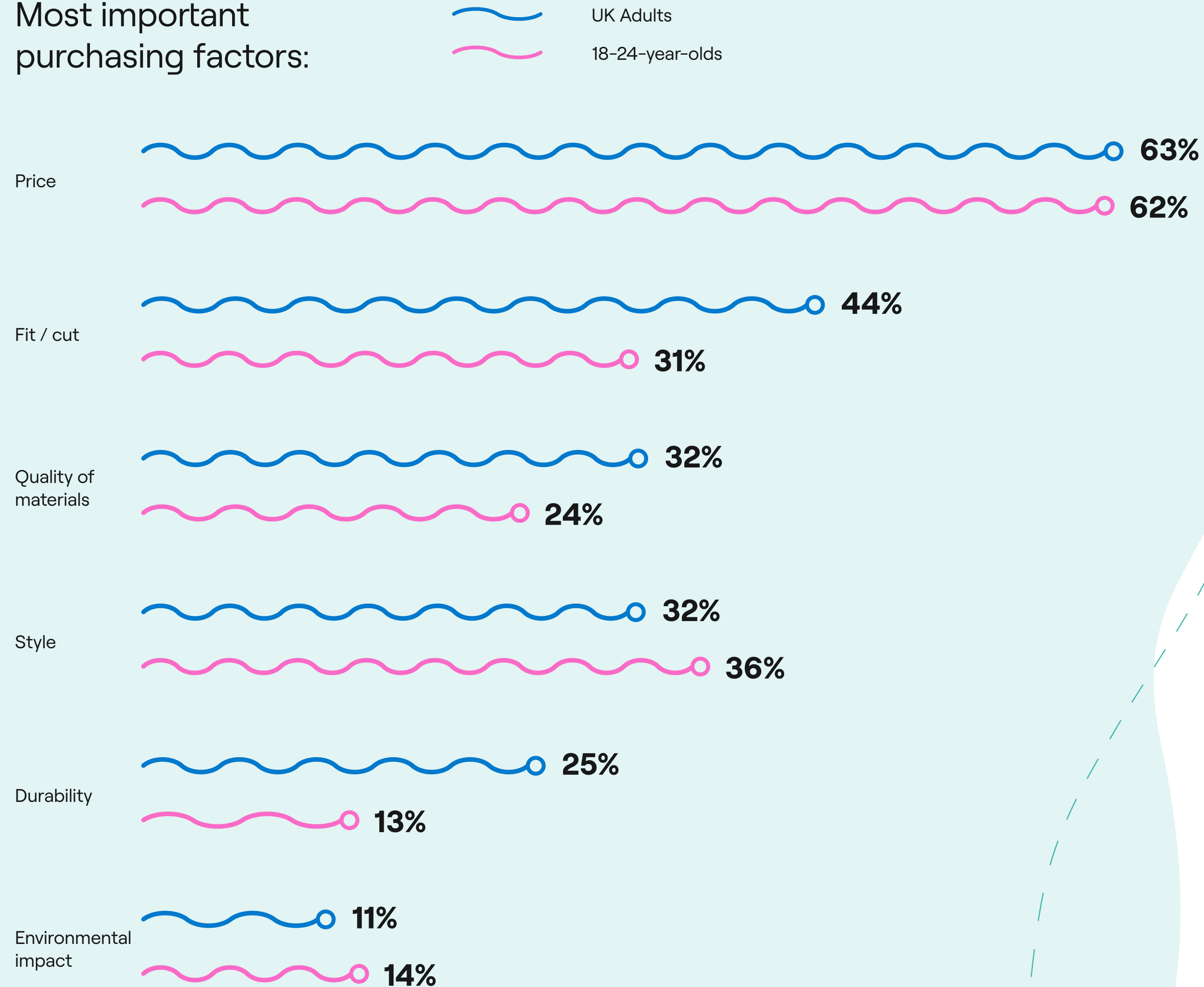
A slow but steady climb for sustainable fashion, with some barriers along the way

To the average UK adult, the fashion sector remains the second least sustainable industry (behind Travel), with there being an increased awareness in the term 'Sustainable Fashion' this year - 33% claiming to know at least a little about it and 47% aware amongst 18-24s (up from 39% in 2019).

Concern about fashion sustainability nowadays has increased by 10ppts this year to 48%, with younger generations showing the greatest concern (18-24s – 62% vs 43% in 2019).



Most important purchasing factors:



However, this doesn't seem to be enough to drive a change in consumer behaviours. Whilst an item's 'environmental impact' is becoming an increasingly important factor when making a fashion purchase (11% vs 9% in 2019), it stills falls very low down the rank of key drivers of purchase.

And despite not having anywhere to go in the last year, spending time shopping for clothing has remained an enjoyable and impulse driven hobby, as 36% of adults claim to like to spend their free time shopping (vs. 31% in 2019) and 39% often buy clothes on impulse (vs 34% in 2019). The impact of social media drives a need for constant 'newness', resulting in 32% claiming to not like to repeat outfits too often (vs. 27% in 2019) and 34% claiming to own a lot of clothes they have only worn once (vs. 25% in 2019). All of these attitudes are even more prevalent amongst younger shoppers, regardless of their increased concern in this area.

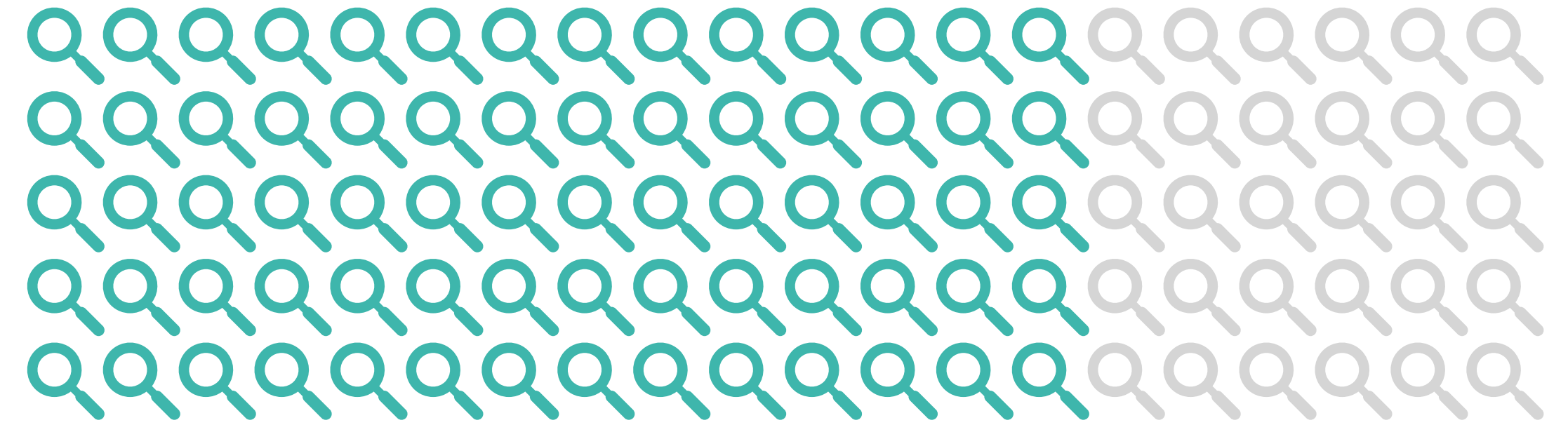


Ignorance is often bliss when it comes to fashion buying

The demand for fashion clearly isn't slowing any time soon and we know that sustainability isn't top of the agenda in buying preferences. But how proactive are consumers in seeking out guidance in shopping more sustainably? The simple answer is, unfortunately, not very.

70% of consumers say that they have never thought to look for information on how to shop more responsibly when it comes to fashion. Over half of this group (55%) mention that it would be something they may look to do in the future, whilst the remaining 45% (30% of the UK adults) say that looking for guidance on sustainable fashion purchases just isn't something that interests them.

That said, 3 in 10 UK adults claim that they have sought out resources to broaden their knowledge in sustainable fashion shopping, either frequently (10%) or in the past (21%). Those that fall into the 'engaged' category skew younger (50% 18-34-year-olds vs 30% total sample), with a higher proportion living in urban areas such as London (44%).

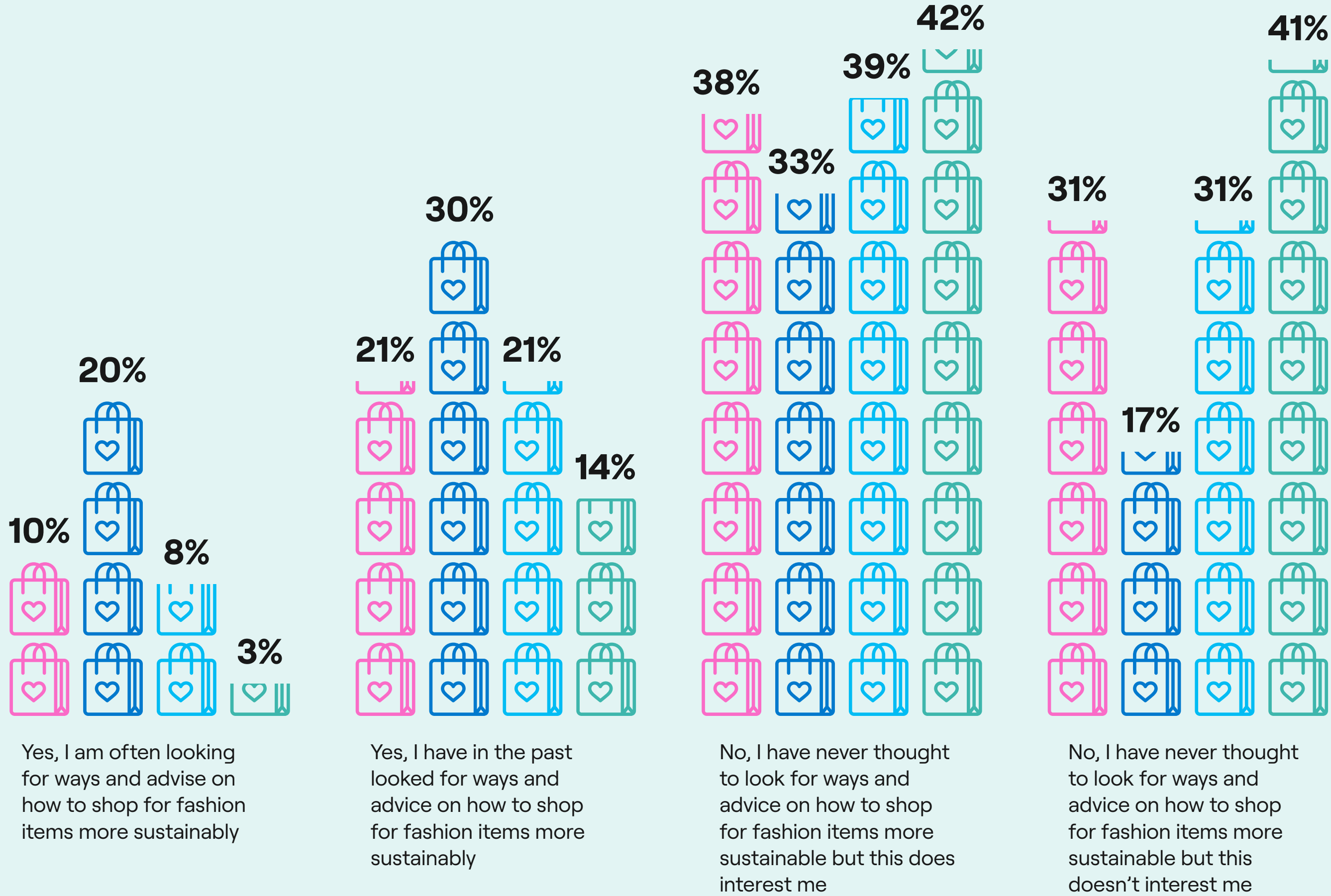


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of consumers say that they have never thought to look for information on how to shop more responsibly when it comes to fashion

Internet searches are the most common research channel for seeking out such information (42%) amongst those who have done this before, whilst advice from family and friends or via a retailer website come in at joint second (22%). For the 18-34 audience, bloggers / vloggers (23%), influencers (20%) and online forums (20%) are more likely to be utilised than in comparison with other age groups.

Guidance seeking behaviours by age group



Despite greater accessibility, buying sustainably still isn't top of mind for most

With many retailers and brands now offering 'conscious' or 'responsible' lines within their fashion portfolios, consumers have more opportunities to buy sustainably than ever before. But with convenience and value topping the main purchase drivers, accessibility to sustainable fashion items alone may not necessarily be a direct catalyst for purchase.

A third (32%) of the population can't be sure whether they've purchased a sustainable fashion item whilst 37% said they haven't bought any at all, rising to 47% amongst those over the age of 55. Amongst those who haven't bought a sustainable fashion item, lack of thought once again is the main reason (47%). On the other hand, 16% claim that they just wouldn't know where to buy a sustainable fashion item, highlighting a lack of education.

31% of UK adults claim to have purchased a sustainable fashion item in the last 12 months, at an average of 2 items per person - this number rising to 3 amongst younger consumers. A gentle demonstration of their attitudes to sustainability beginning to be expressed through their purchase behaviour.



1/3

**of the population can't
be sure whether they've
purchased a sustainable
fashion item**

‘Sustainable’ materials is the most persuasive driver of buying responsibly

Consumer understanding of sustainability in regard to fashion is often limited. And, truthfully, it’s no wonder. The topic is complex and multifaceted. So how are consumers who claim to have bought a sustainable fashion item in the last 12 months navigating this challenge? What are the attributes or indicators that lead them to believe they are buying responsibly?

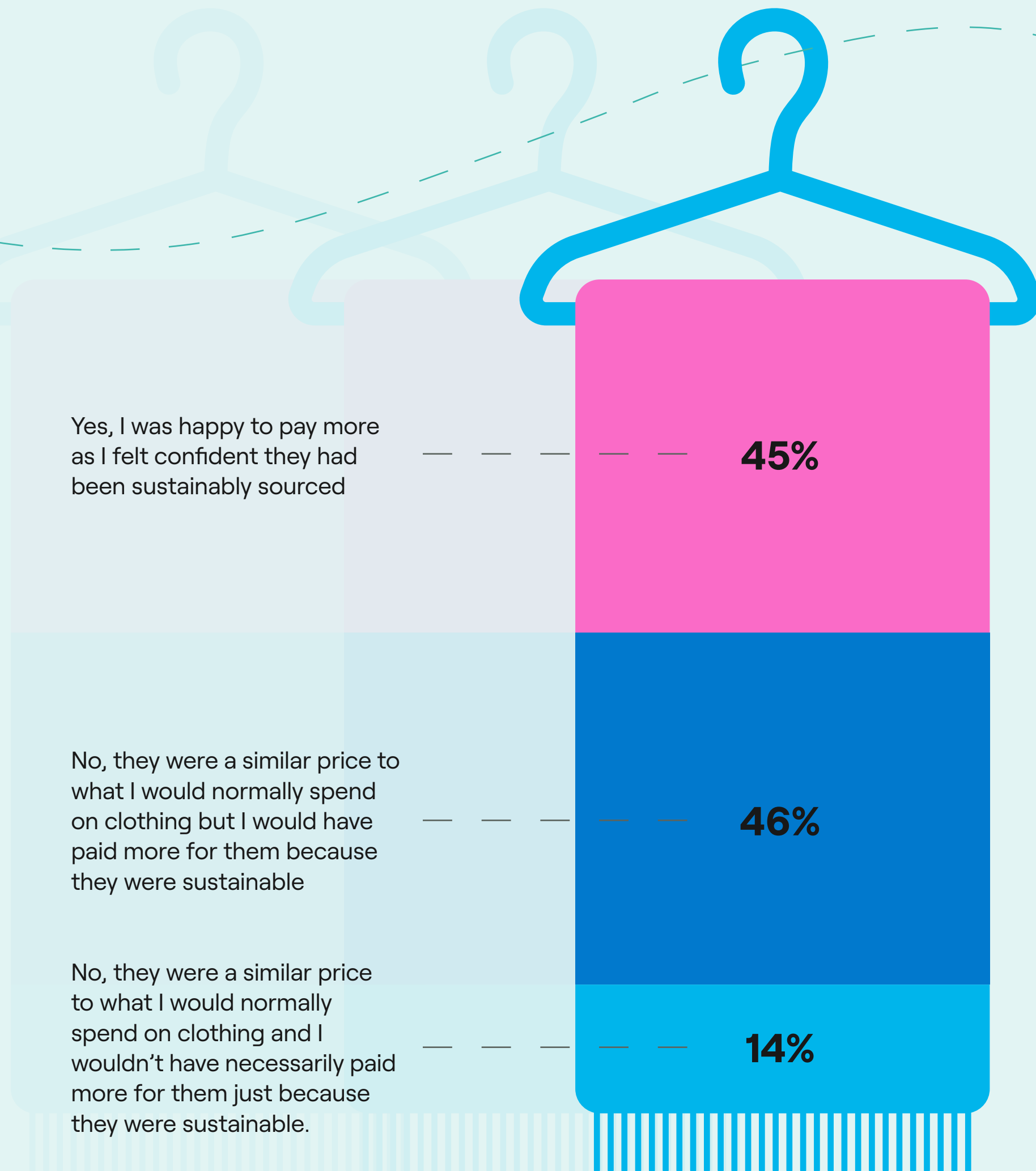
Well, over half (53%) said that the items were made from ‘sustainable materials’, whilst just under a third claimed that the online delivery packaging was recyclable (31%). The same proportion believed that the workers who made the garment were paid a fair wage (31%) and 3 in 10 thought that the clothes / accessories were made locally in the UK. So with such assurances on conscious purchasing, were consumers willing to spend more on their fashion items to account for extra costs associated with responsible sourcing?



Of the responsible buyers, 45% mentioned that they paid more than they usually would for an item because of its sustainability credentials



Willingness to spend more for sustainable garments



Of the responsible buyers, 45% mentioned that they paid more than they usually would for an item because of its sustainability credentials, rising to 57% of 25-34-year-olds. A similar number (46%) said that the price of an item was similar to what they usually pay but they would have happily spent more for the sustainability status. Conversely, 1 in 7 (14%) said that the cost was similar to usual pricing and they wouldn't have paid more for it just because it was sustainably sourced, rising to 20% amongst those aged 55+, who typically show less environmental concern.

SUSTAINABLE FASHION:

Taking responsibility

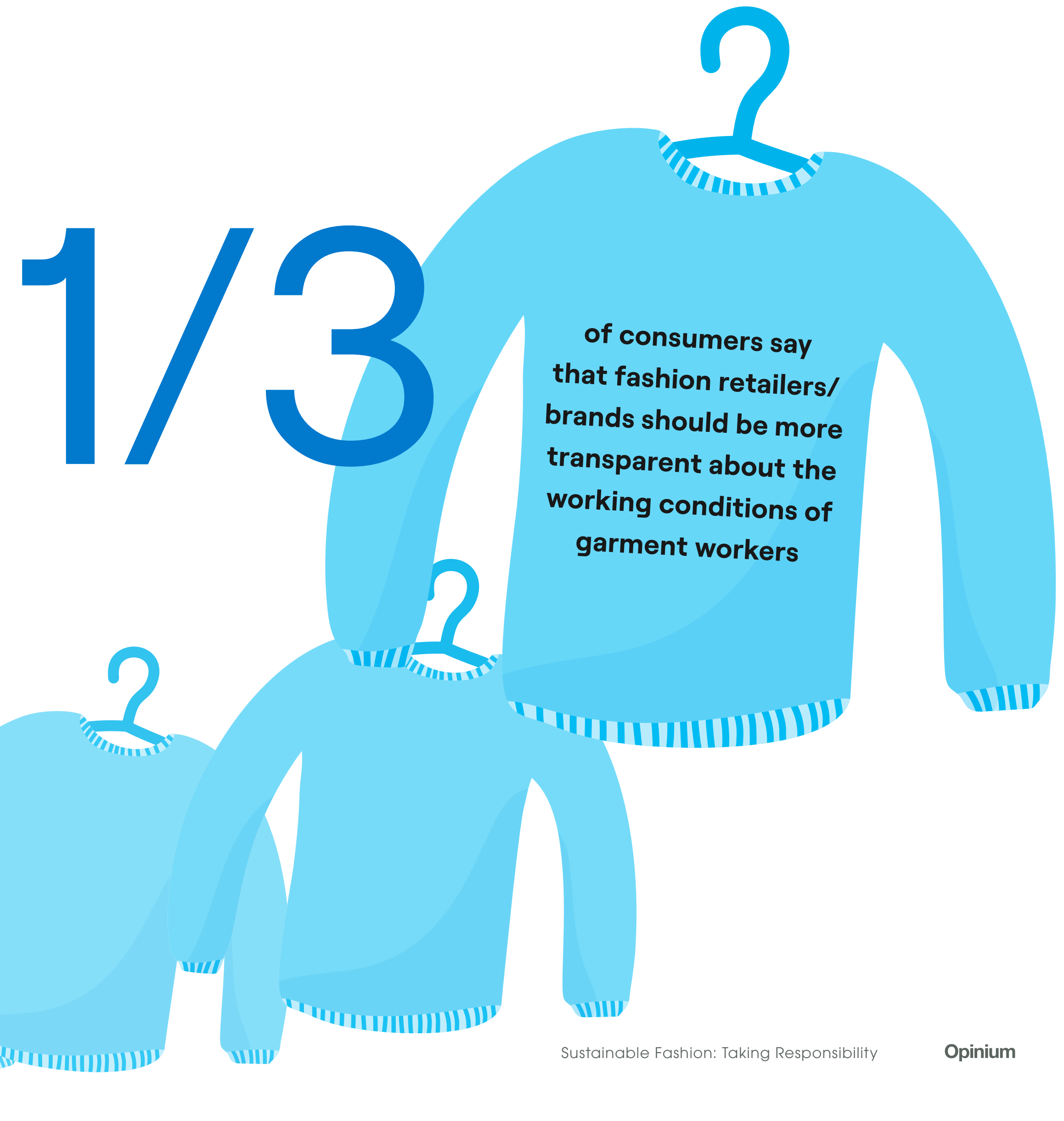
It's not my problem!

Consumers look to retailers and brands to drive change

UK consumers equally believe it is the brand and retailer's responsibility for encouraging more sustainable shopping behaviours (27% each), with only 15% of adults believing it is up to them as individuals to make the change. This is something that is exaggerated further amongst 18-24-year-olds, who believe the government have a greater role to play (26% vs 21% for retailers and 28% for brands)

So, what is it that is expected of fashion retailers/brands?

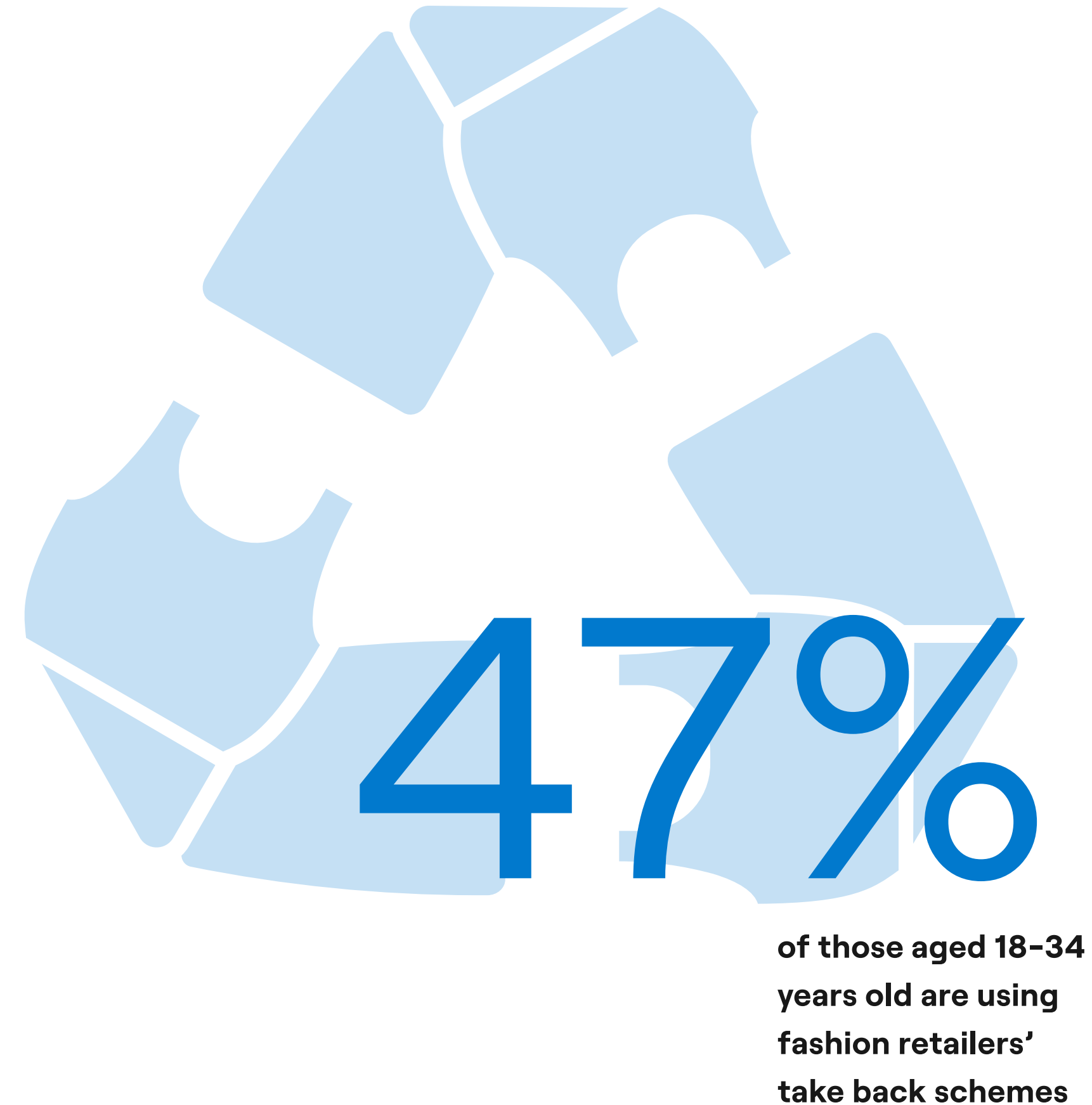
In the main, to be more transparent about the working conditions of garment workers (34%) and the brand's environmental impact (30%), as well as setting sustainability targets (32%).



Out with the new, in with the old. From recycling to re-wearing, second-hand markets are a growing opportunity

The second hand market is expected to double over the next 5 years, reaching \$77bn by 2025¹. As consumers become increasingly aware of the detrimental effects of purchasing brand new items, many are turning their interests to new methods being offered by retailers.

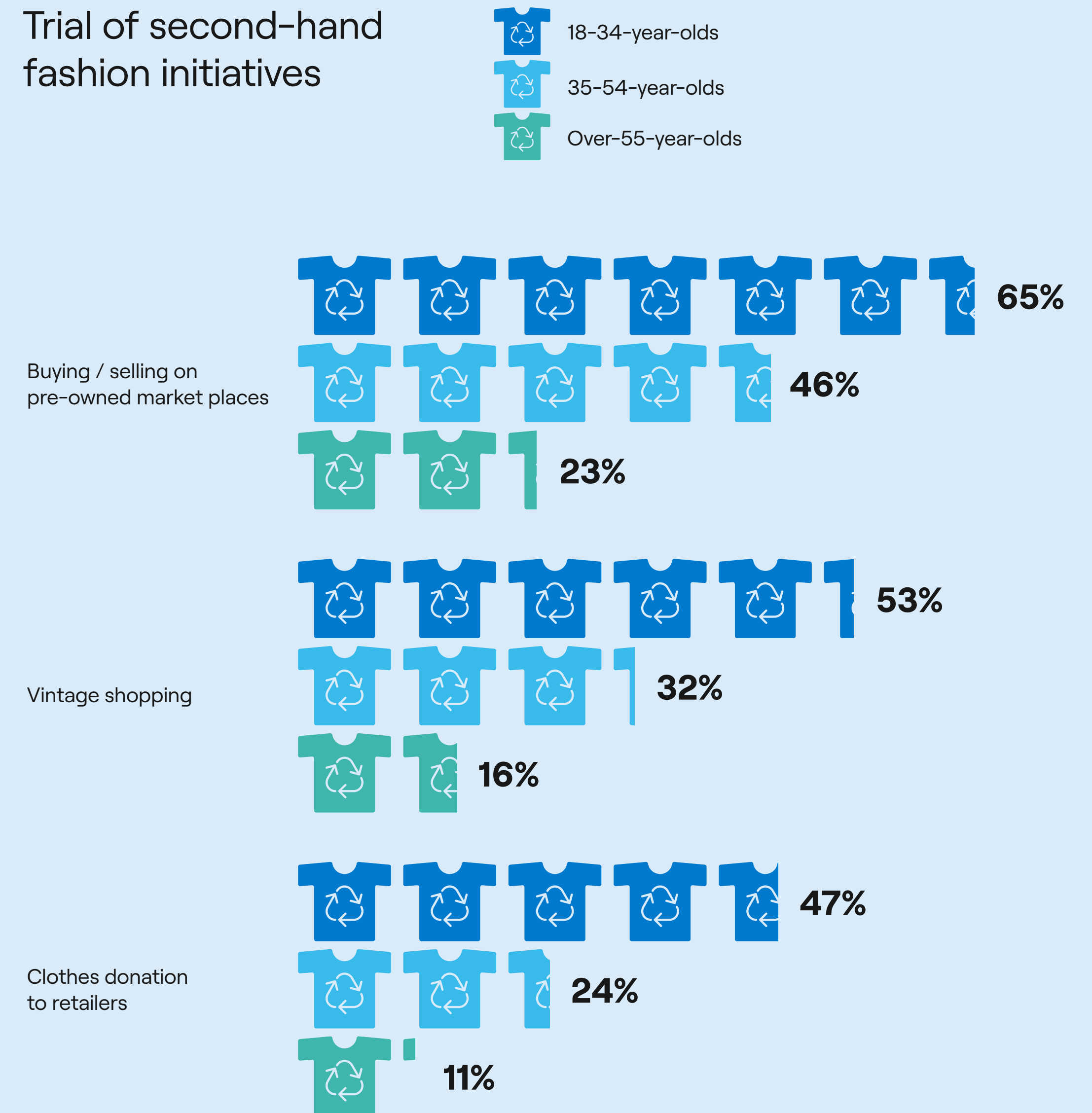
Retailers are branching out into the world of second hand, from pre-loved ranges to vintage renewals, and this is something we are seeing from both high end and high street. With a fifth of consumers (19%) wanting to see their favourite retailers offer second-hand ranges to buy from, it's the perfect time for new initiatives to be implemented.



Four fifths of consumers (82%) have donated their clothes to charity shops, with 70% planning to continue doing this in the future – though this is much more likely among over 55s (83%) than 18-34-year-olds (54%). This disparity may be due to younger consumers turning to alternative methods of donation, with almost half (47%) of those aged 18-34 years old using fashion retailers' take-back schemes. And with 41% of consumers open to the idea of using take back schemes for the first time, there is certainly opportunity for retailers to grow in this space.

Consumers are also taking business into their own hands, with 43% of respondents having tried buying or selling pre-owned clothing via online marketplaces (e.g. Depop, eBay and Vinted), compared to 39% in 2019. Over half of women aged 18-24 years old (56%) have tried and will continue to use online marketplaces, compared to 32% of overall respondents.

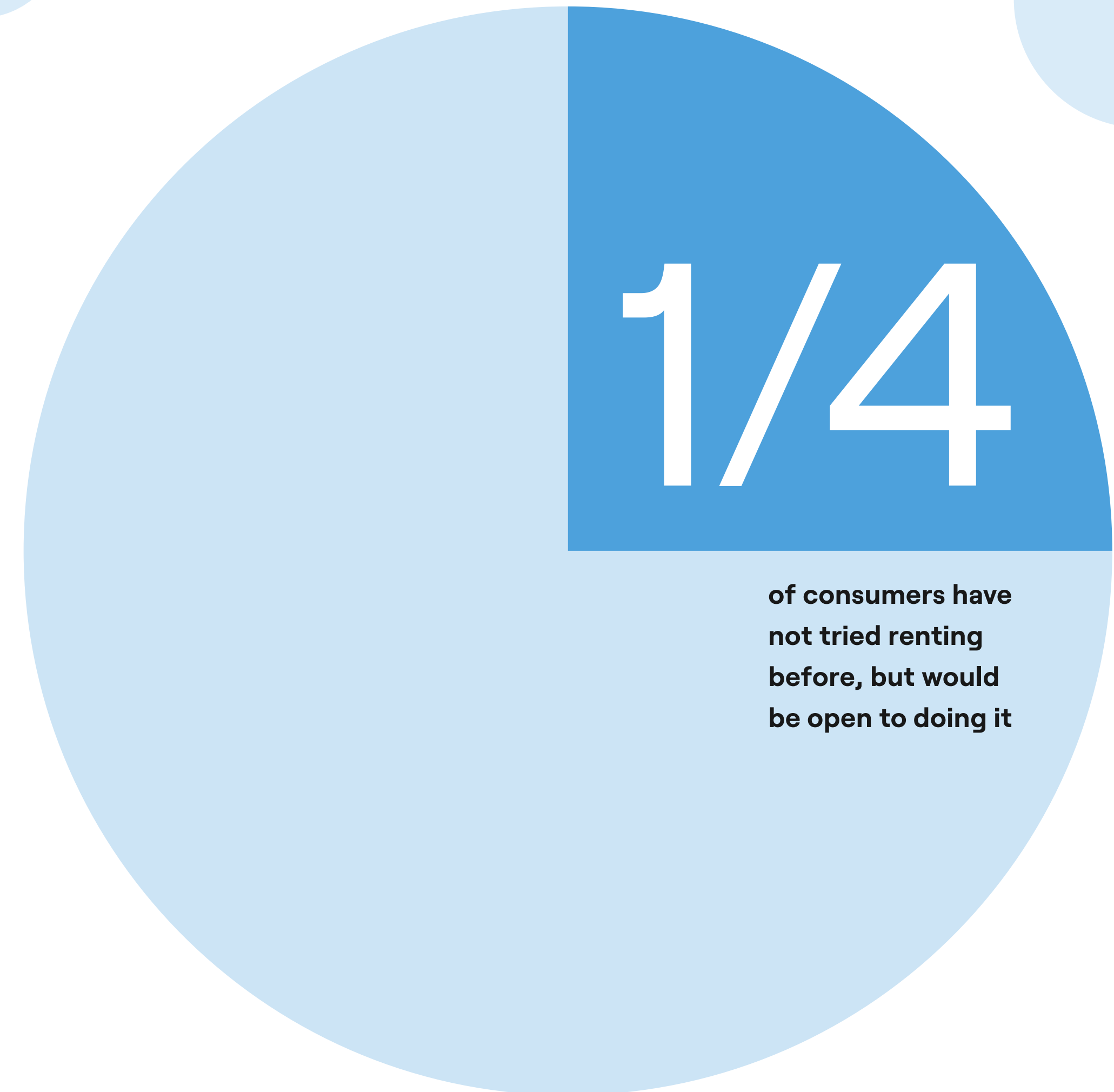
Trial of second-hand fashion initiatives



Environmental concerns are top reasons for renting

Over the past few years, there has been a lot of noise around the rise of new business models, with the new golden word being rental. Historically in the west, rental has been associated with the hiring of occasion wear, most commonly for weddings or events, and so, unsurprisingly, our research shows that almost a quarter (23%) of men have tried clothing rental, compared to only 10% of women. Overall, around one in six consumers have tried renting (16%), up from just 12% in 2019. Of respondents who would be open to renting, over half (59%) stated they would do this as a one-off occasion-based rental directly from a retailer, compared to a quarter (24%) who said a one-off occasion-based rental from a peer-to-peer platform.

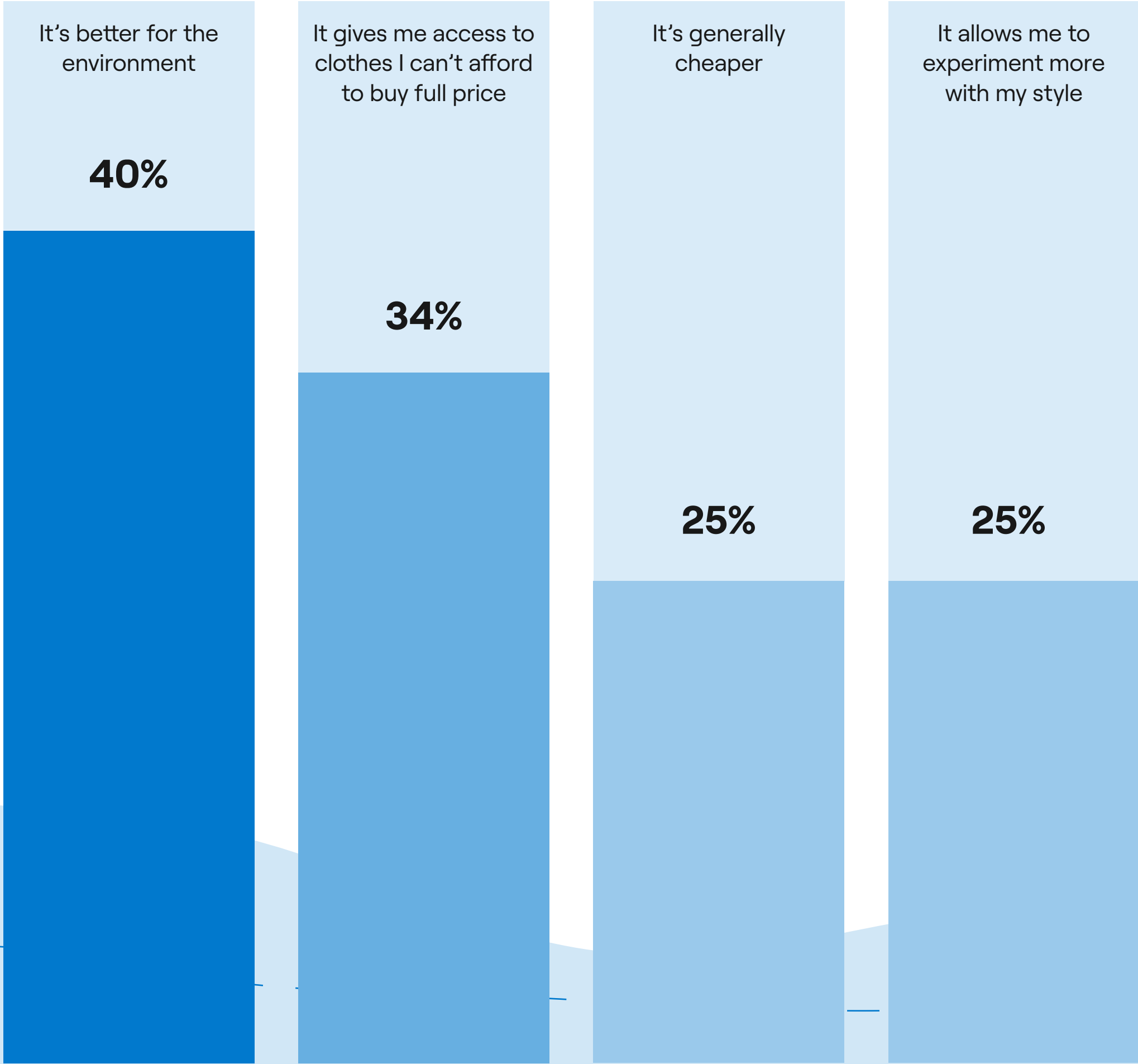
Zeitgeist rental platforms such as Hurr, Rent the Runway, and My Wardrobe HQ, have not only been democratising the accessibility to luxury garments, but also creating a new mindset towards consumption. Clothing rental is being driven by younger consumers, with 32% of 18-34-year-olds having tried renting, compared to only 6% of those aged 55+. In addition, almost two fifths (39%) of those in London have tried clothing rental, which may be reflective of the prominence of initiatives in flagship and larger stores.



Reasons for renting/potential renting of fashion items

Shifting mindsets means that a quarter of consumers (25%) that have not tried renting before would be open to doing it. Consumers’ biggest reasons for renting items is that it is better for the environment (40%), and that it gives them access to clothing they couldn’t afford to buy at full price (34%). Three quarters of respondents would be open to renting clothing for themselves (75%), followed by accessories (59%) and shoes (42%). A fifth of 35-54-year-olds (20%) would also be open to renting clothing for their children, a niche but needed market space being transformed by retailers such as Bundlee.

However, after over a year of heightened concerns around health and safety, it is no surprise that almost half of respondents (45%) said that hygiene was the biggest barrier to renting fashion items, up from 41% in the pre-pandemic landscape of 2019. Almost two fifths (37%) are also afraid that they will damage the items and so it will be important that retailers are clear on what the process is if that were to happen.



The repair market is the underdog for new business models

With a mindset of 'make do and mend', it is perhaps unsurprising that our research highlighted a divide in behaviours between the generations when it comes to repairing clothing. Amongst those aged over 55, many of whom experienced the hardships of a post-war economy, 61% have repaired items of clothing themselves, compared to only 40% of 18-34-year-olds. However, 46% of 18-34-year-olds have used clothing repair services, compared to only 29% of those aged 55+. This demonstrates that a lack of knowledge or resources, as well as time sensitivity, may be a barrier to people carrying out the work themselves. As a result, one in seven consumers (15%) stated that they would like to see the fashion brands they love offer a repair service, and one in ten (11%) would like repair information included on clothes' care labels.

Wrapping up

So how engaged are the UK audience with shopping sustainably? Do those who want to / think they shop sustainably, really know what they are doing? And are the steps retailers are making in this space driving the change desired?

01

Recovery will take time

1 in 2 adults are excited to start wearing clothes they haven't had the opportunity to wear again. And only 1 in 4 claim they are likely to spend more on fashion items now things are opening up again. So it could be a long road of recovery for fashion retailers.

02

A slow but steady climb for sustainable fashion

1 in 3 consumers claim to know at least a little about fashion sustainability and their concern has grown significantly since 2019. However, price remains the ultimate driving factor of purchase choice and an item's environmental impact falls much further down the list.

03

Ignorance is often bliss when it comes to fashion buying

7 in 10 British adults have still never thought to look for information on how to shop more sustainably when it comes to fashion. But amongst those that do, the top sources of information are internet searches, peer recommendation and retailer websites.

04

Buying sustainably still isn't top of mind for most

1 in 3 consumers can't be sure whether they have purchased a sustainable fashion item in the last 12 months – the main reason being that they just haven't thought to do so. But for a small group, there is also the lack of guidance on where to even start if they did!

05

***It's not my problem!* Consumers look to retailers and brands to drive change**

Only just over 1 in 10 adults believe it is their responsibility to encourage more sustainable shopping behaviours. Instead, consumers are looking to retailers and brands to take the lead by setting targets and providing transparency on their ways of working.

06

Out with the new, in with the old: second- hand markets are a growing opportunity

4 in 5 Brits have donated old clothing to charity shops, 4 in 10 are open to the idea of retailer take back schemes, and a further 4 in 10 have trialled selling their clothing on second-hand sites such as Depop, eBay etc. The demand for circular is clear, present and growing.

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What people think,
feel and do

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