

# Fashion Sustainability Report 2023

Exploring attitudes and behaviours towards fashion and sustainability amongst the UK public in 2023



What people  
think, feel  
and do





# How we conducted the research

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2,000 UK adults aged 18+, weighted to be representative of the UK population



Interviews conducted via a 15-minute online survey



Fieldwork conducted June 2023



3<sup>rd</sup> wave of Fashion Sustainability research, including tracked questions for YoY comparisons:

- Environmental concern
- Knowledge and concern with Sustainable Fashion
- Sustainable Fashion behaviours



# Environmental concern in the wake of a cost- of-living crisis

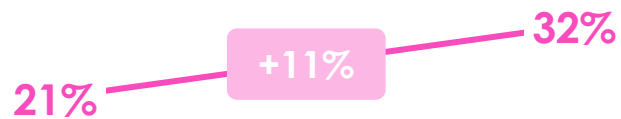
## Over the last few years, consumer concern toward the environment has declined

Since 2019, there has been a significant decrease in the number of people claiming that the environment was a key concern with considerably more UK adults, 1 in 3, suggesting that the environment is not something they are particularly concerned about.

NET: **Concerned** about the environment



NET: **Not concerned** about the environment



2019

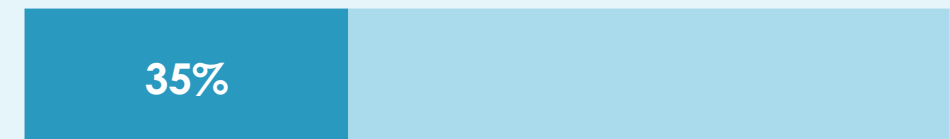
2023

It could very well be that concern toward environmental issues has fallen naturally, however it is more than likely that **recent global issues, such as the pandemic and the cost-of-living crisis, have had more of a direct financial impact, consuming our capacity for external worries.**

Feel **unsatisfied** with their ability to live within their means each month



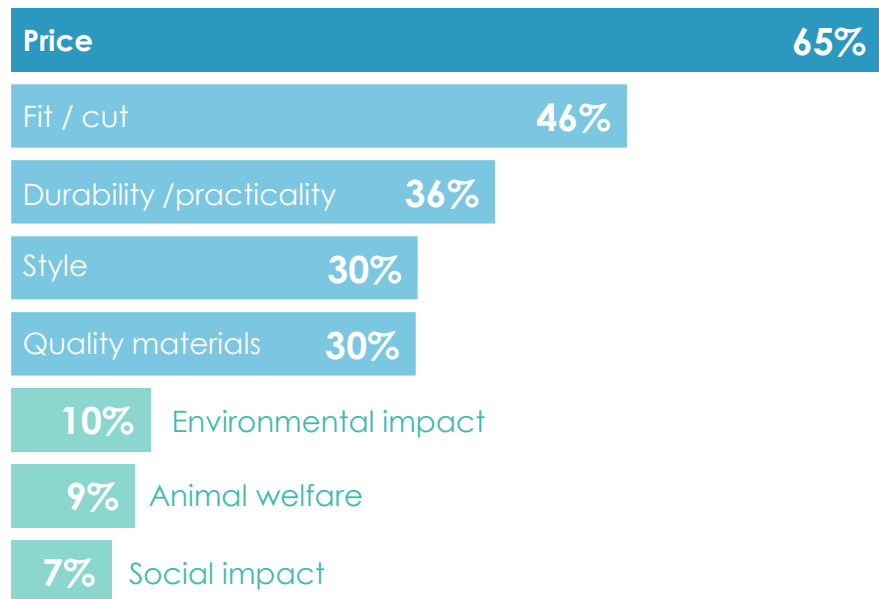
Feel **unsatisfied** with their ability to spend on non-essential items



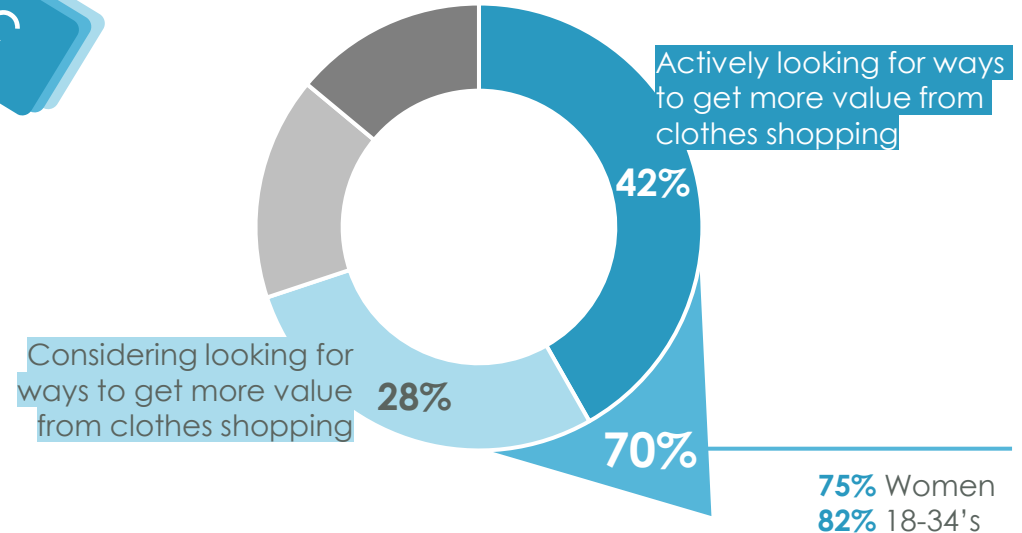
## With finances being a primary worry for many households, consumers are looking for ways to save.

Amongst British adults, price is the top factor when thinking of purchasing a fashion item. 70% are either actively or considering looking for ways to get more value from clothing and fashion items, particularly women and 18-34's.

Q - Which of the following factors are most important to you when purchasing a fashion item?

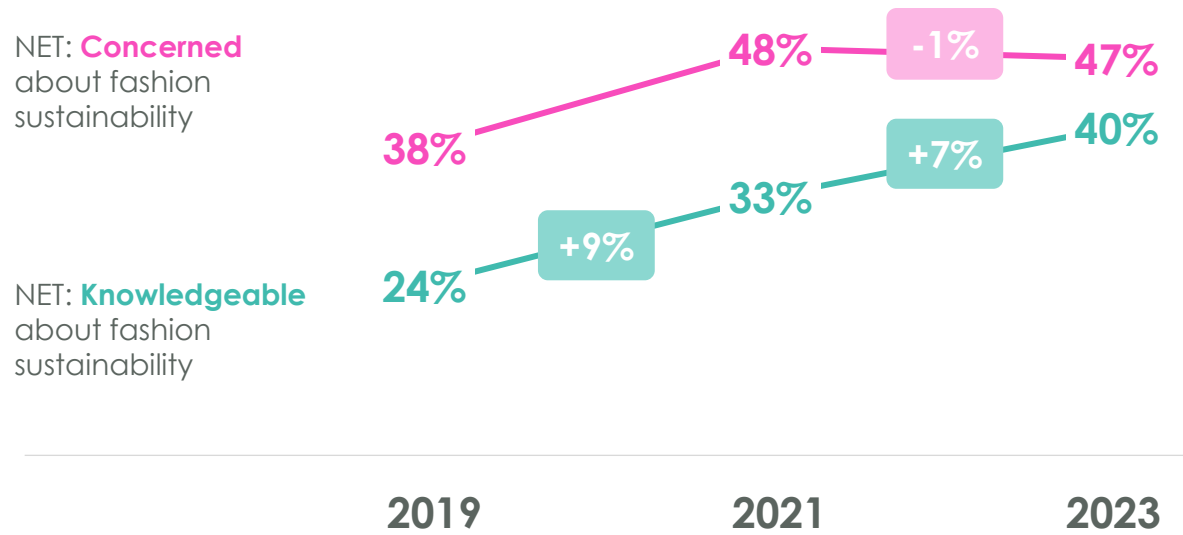


Q - Thinking about shopping for clothes, which of the following best apply to you regarding your current financial situation?



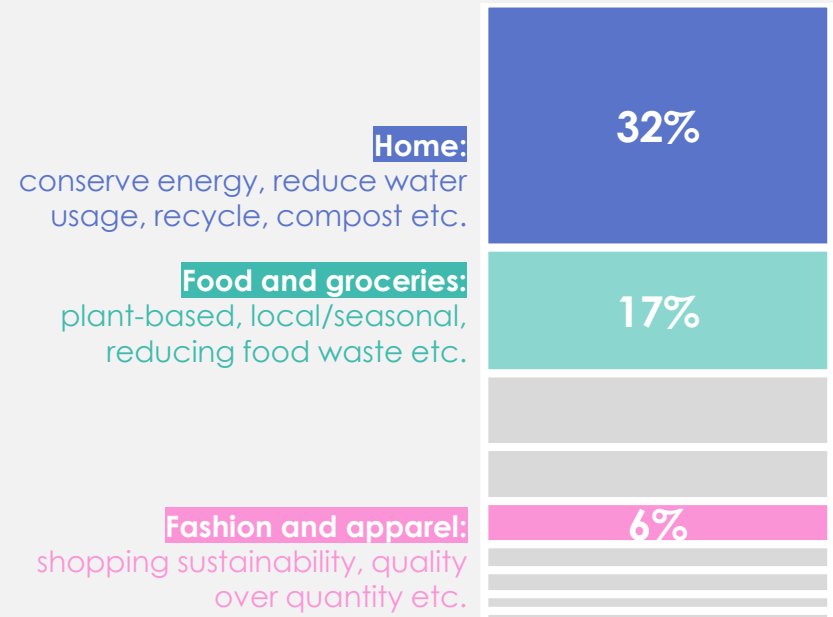
## So, with price top of mind, where does sustainability come in?

Despite claimed knowledge of fashion sustainability growing significantly over the last 4 years, concern has remained static since 2021...



Q - How much do you feel you know about Sustainable Fashion?  
 Q - Using the scale below, please tell us how concerned you are about sustainable fashion...

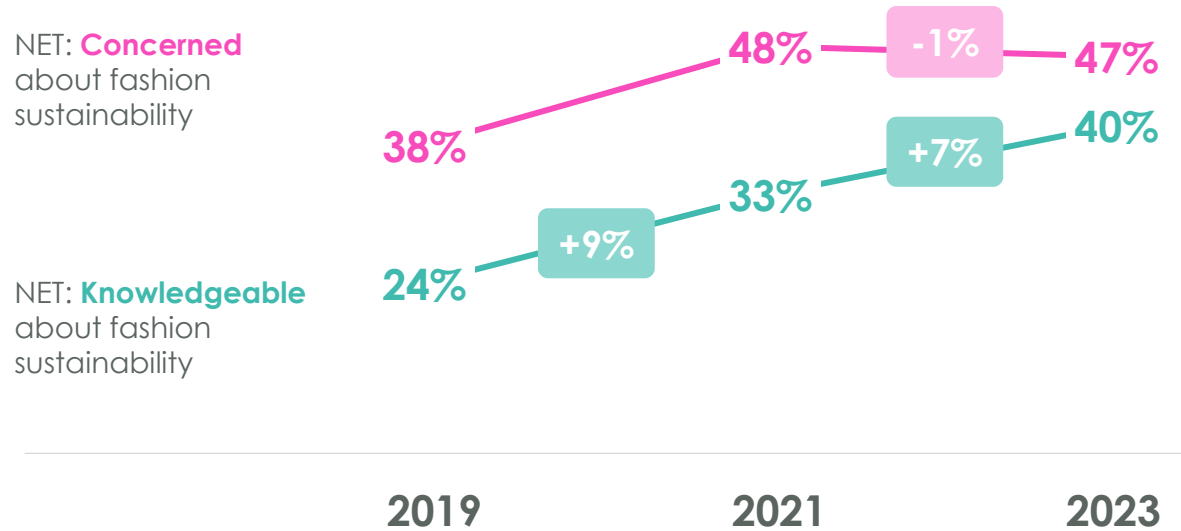
...and compared to other sustainable endeavours, fashion sustainability isn't a priority for many consumers.



Q - For you personally, which of the following is the biggest priority with regards to shopping sustainability and lifestyle?

## So, with price top of mind, where does sustainability come in?

Despite claimed knowledge of fashion sustainability growing significantly over the last 4 years, concern has remained static since 2021...



Q - How much do you feel you know about Sustainable Fashion?  
 Q - Using the scale below, please tell us how concerned you are about sustainable fashion...

...However, this is not to say that consumers haven't adopted more sustainable practices when it comes to clothing and fashion, but typically such behaviours are likely a consequence of a primary desire to save money:

82%

"I buy less clothes now than I did a year ago"

Not the case for the majority of Gen Z – 57% claim to be buying more

51%

Likely to limit the amount of new clothes they're buying in the future

Only 32% amongst Gen Z

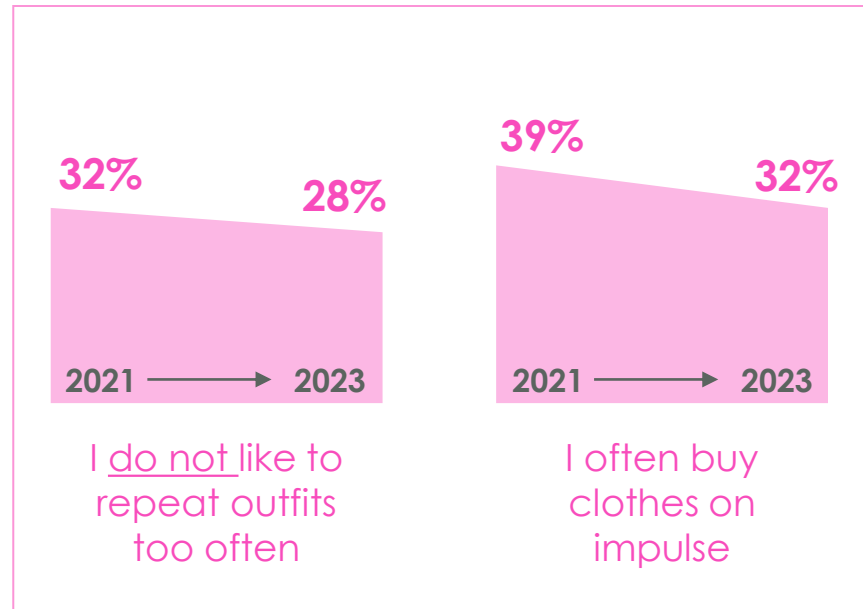


# Considered buying, quality and fabrics

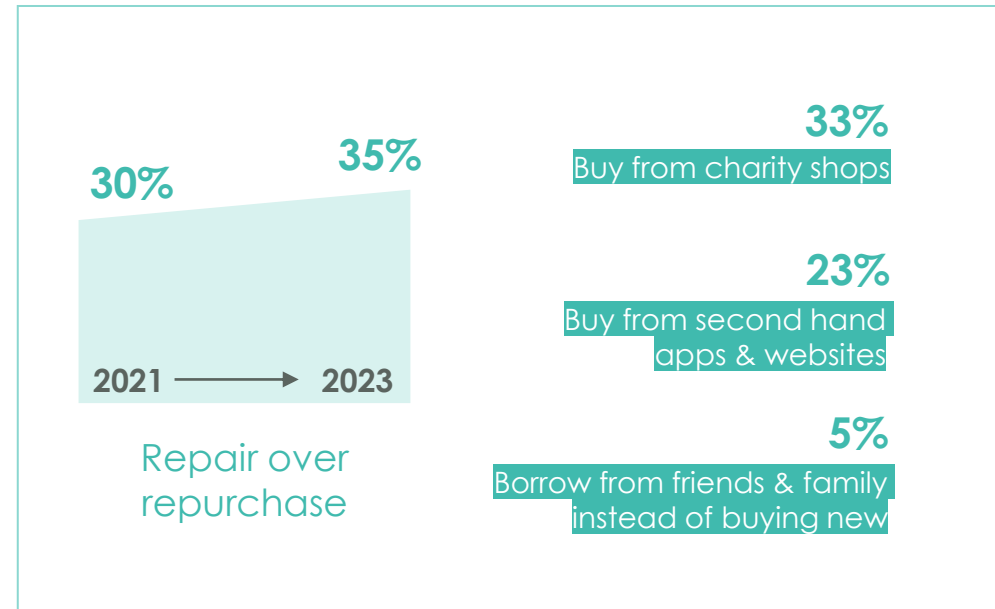
## UK adults are making more considered choices when it comes to fashion, which are sustainable in nature but also more financially rewarding

Compared to 2021 less agree with the statement 'I don't like to repeat outfits too often', less people are buying clothes on impulse, and more are deciding to repair an item, rather than purchase a new one.

### Less of this...



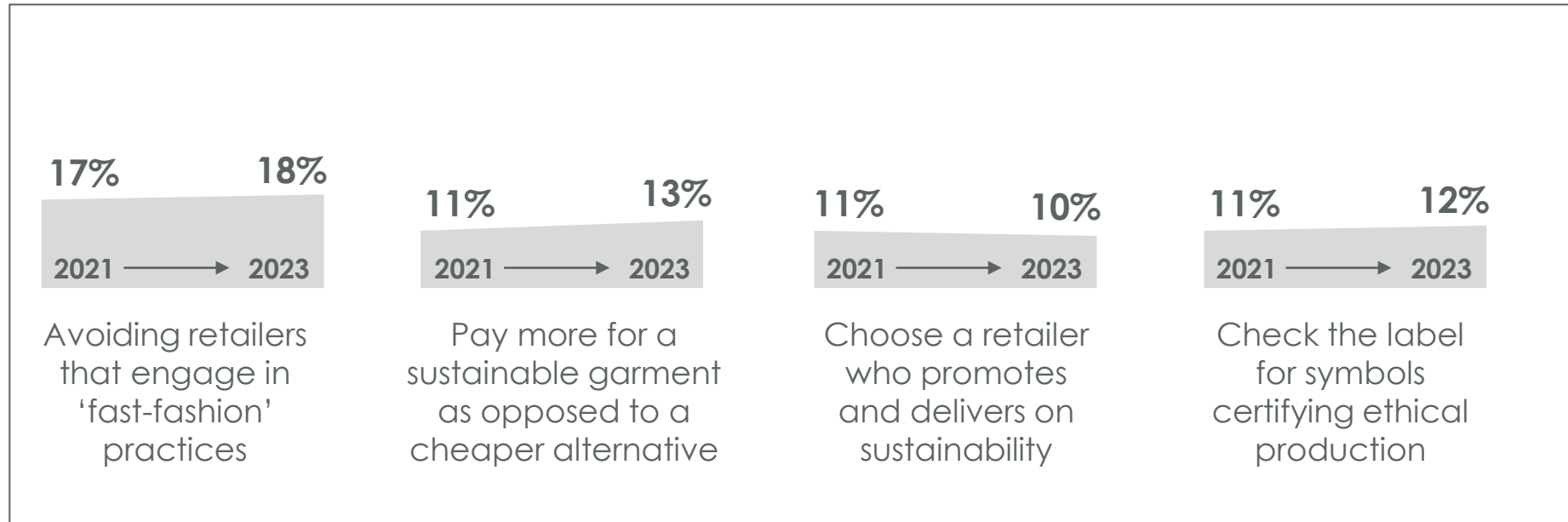
### Instead, more of this...



## When it comes to sustainable behaviours that don't have a financial benefit to the consumer, there is less engagement.

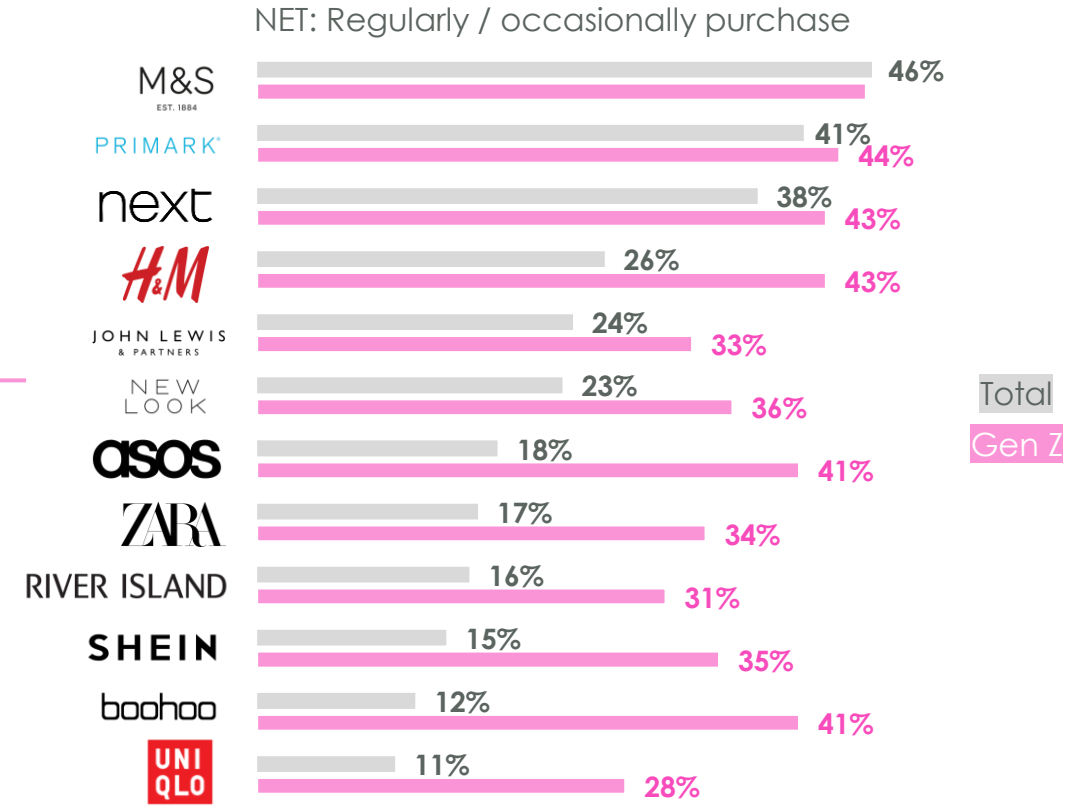
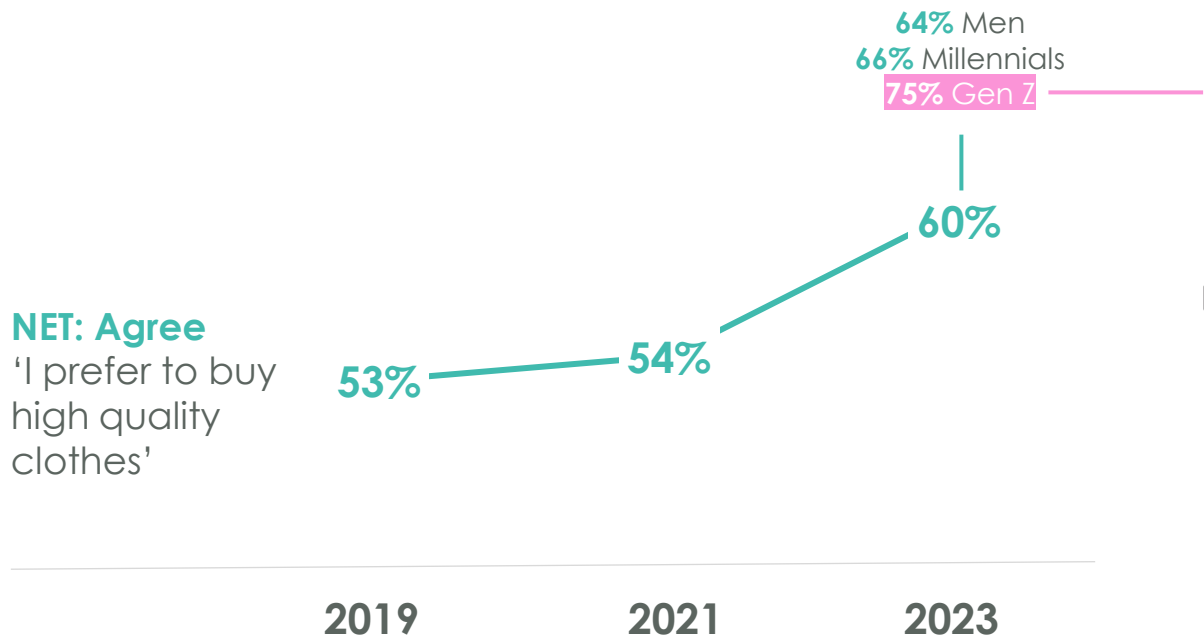
For example, those avoiding retailers that engage in fast-fashion and consumers paying more for a sustainable garment as opposed to a cheaper alternative remain static since 2021. The number of Brits that are choosing a fashion retailer who promotes and delivers on sustainability once again hasn't shifted since 2021, nor has checking the care label for ethical production.

### But no change in these...

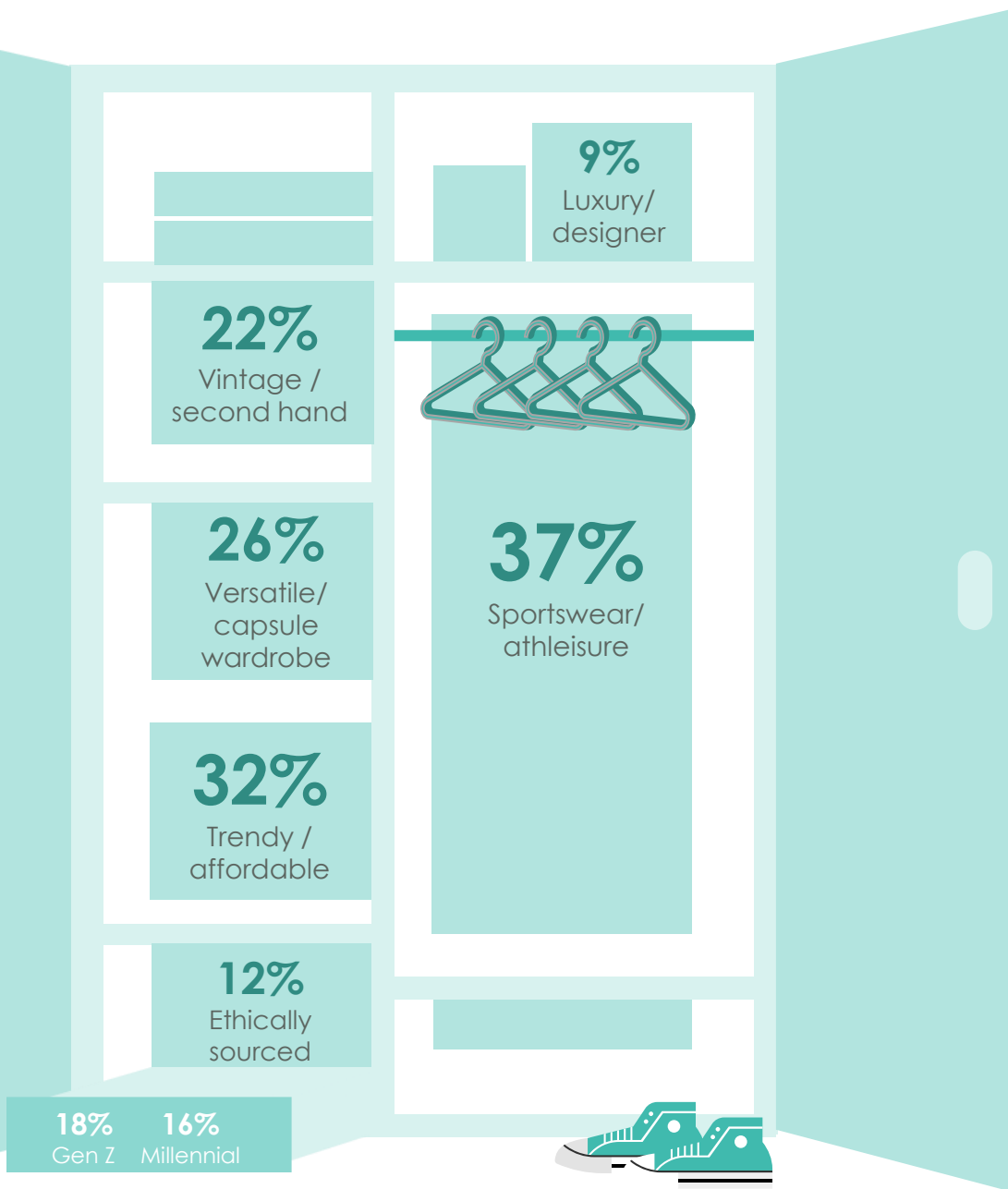


## However, the desire for quality clothing is increasing

60% of Brits prefer buying high quality clothes. This is more so the case for men, millennials and Gen Z, who agree with this more so than other demographic groups.



Despite this claim, Gen Z remain a contradictory generation, as this age group are considerably more likely to purchase from retailers across the board – including those who's ethical and sustainable credentials have come into question in recent years.



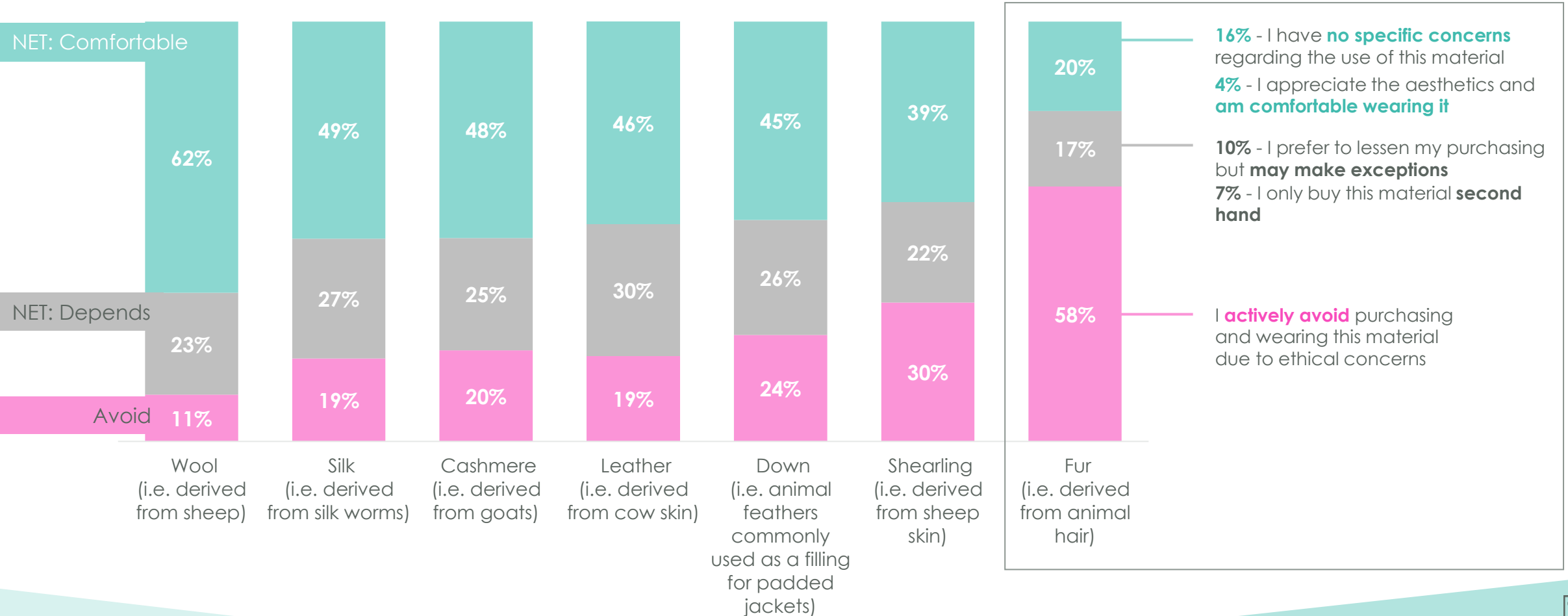
## A look inside the average Brit's wardrobe

The average Brit's wardrobe tends to contain mostly practical & durable sportswear/athleisure (39%), with a mix of trendy/affordable pieces (32%) and versatile/timeless clothing that you'd associate with a capsule wardrobe (26%).

However, Millennials, are more likely to own trendy/affordable clothing (44%), particularly compared to their younger counterparts (29% Gen Z). Despite their differences, both generations own more ethically sourced, designer & unisex clothing than the older Gen X or Boomer generations.

In the last decade, there has been mounting pressure on fashion brands to seek out alternative materials, to cater to a growing base of consumers that want to shop for climate, animal and people friendly products.

## But how do consumers currently feel about animal-derived materials in their wardrobe?



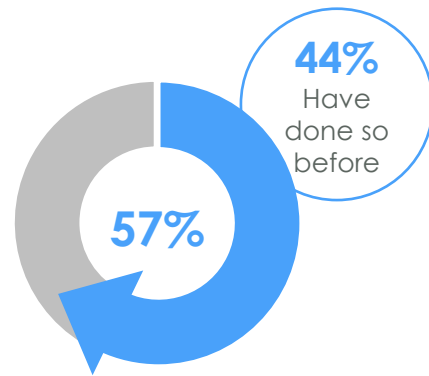
# Looking to the future

## The concept of a circular economy when it comes to fashion has become increasingly popular in recent years

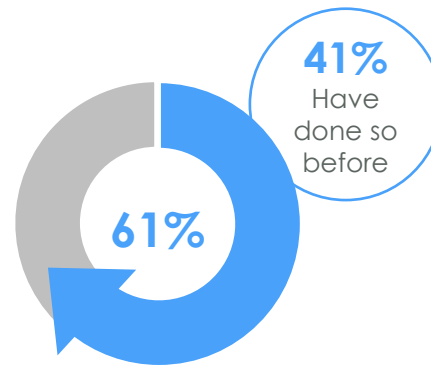
Looking to the future, are consumers going to embrace circular behaviours when it comes to fashion?

NET: Will continue to do or open to doing in future

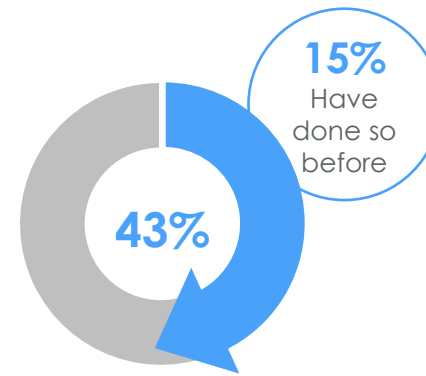
Q – How familiar are you with the following?



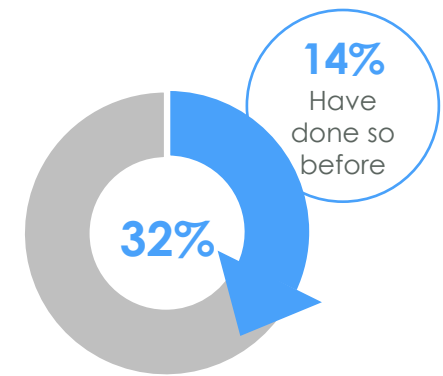
Buying pre-owned clothing via **online marketplaces**



Selling pre-owned clothing via **online marketplaces**



**Clothes swapping** initiatives



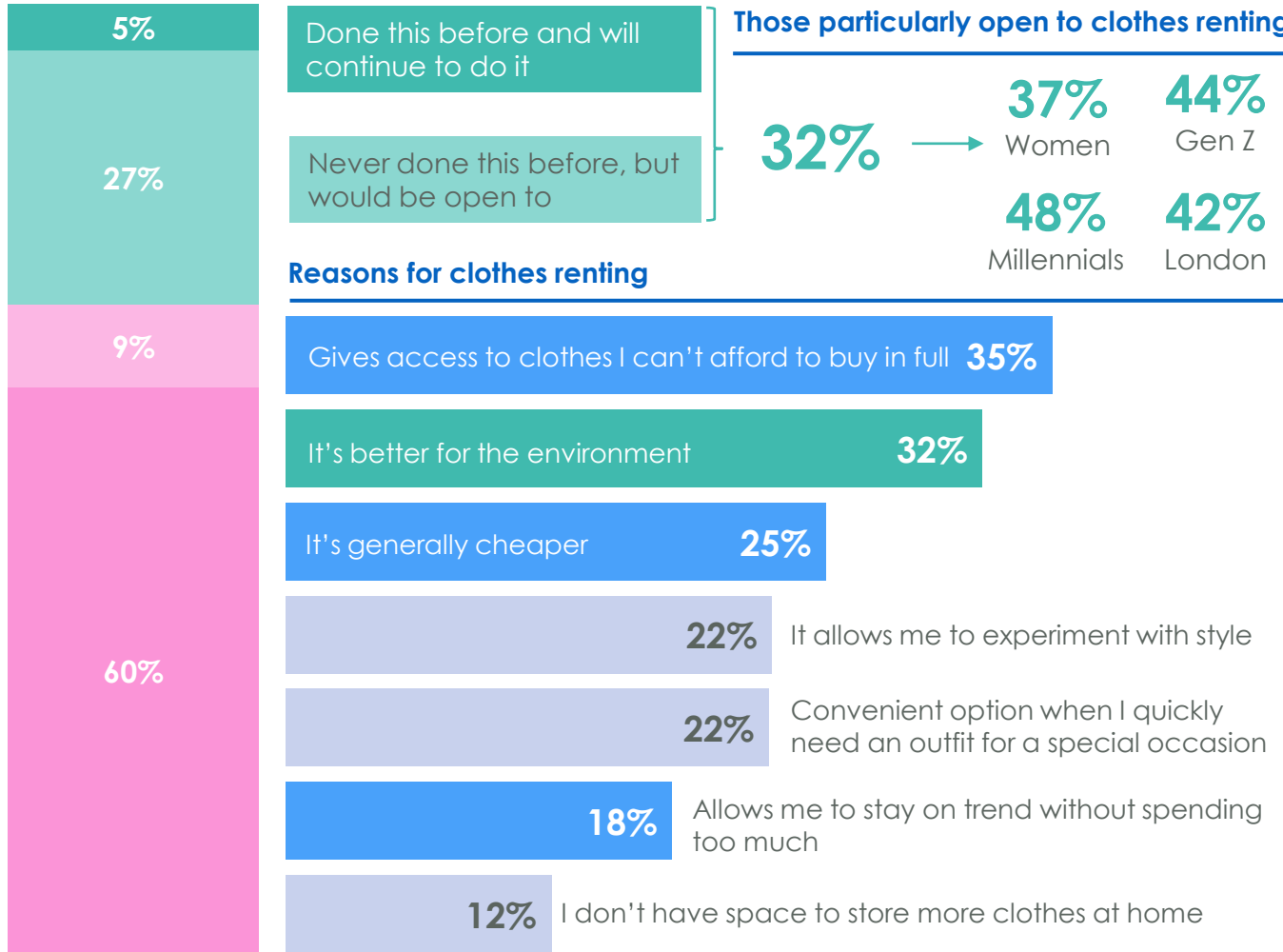
**Clothes renting**

We may see online marketplaces continue to grow in popularity with around three fifths of UK adults open to buying/selling pre-owned clothes, shoes & accessories through sites like Depop, Vinted and Facebook marketplace.

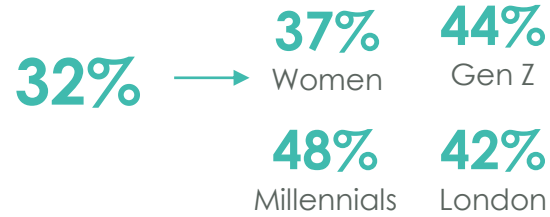
Whilst the environmental benefit of buying pre-loved can be attractive for many, the financial element in the current climate is no doubt a pull factor for these routes too.



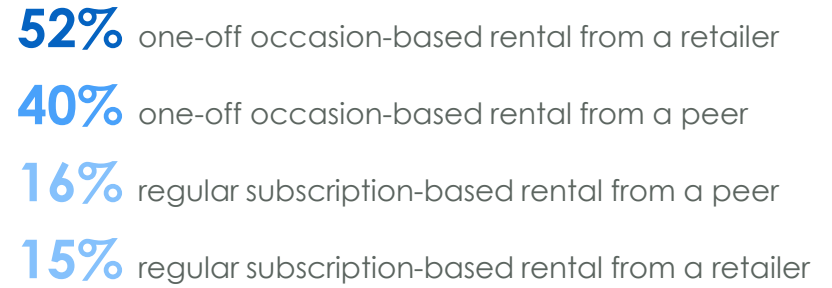
# Clothes renting 101 | The 'Who?', 'Why?', 'What?' And 'When?' of clothes renting



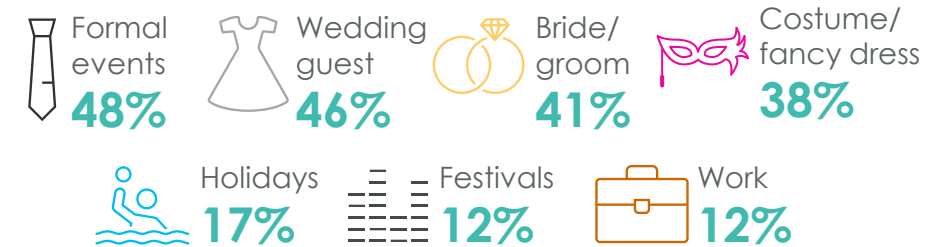
## Those particularly open to clothes renting



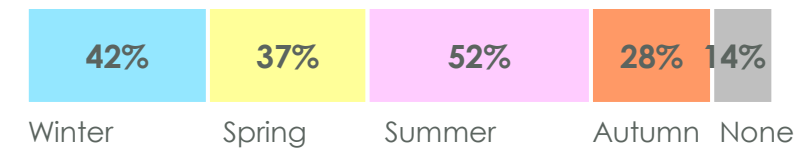
## Ways open to clothes renting



## Occasions open to clothes renting

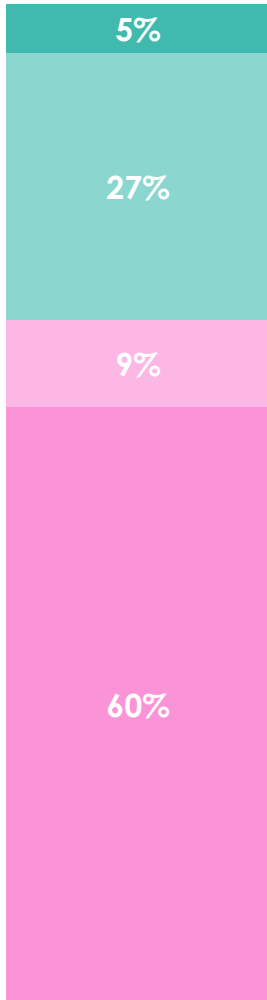


## Seasons open to clothes renting



## Clothes renting barriers

With 60% of Brits having never rented, nor would be open to it in the future – what are the barriers? Over a third (36%) say that hygiene and cleanliness of the item being rented is the key concern, followed by damage worries. Amongst Gen Z, the audience most like to have already tried renting, lack of trust in the rental provider (19%) is significantly higher vs the total.



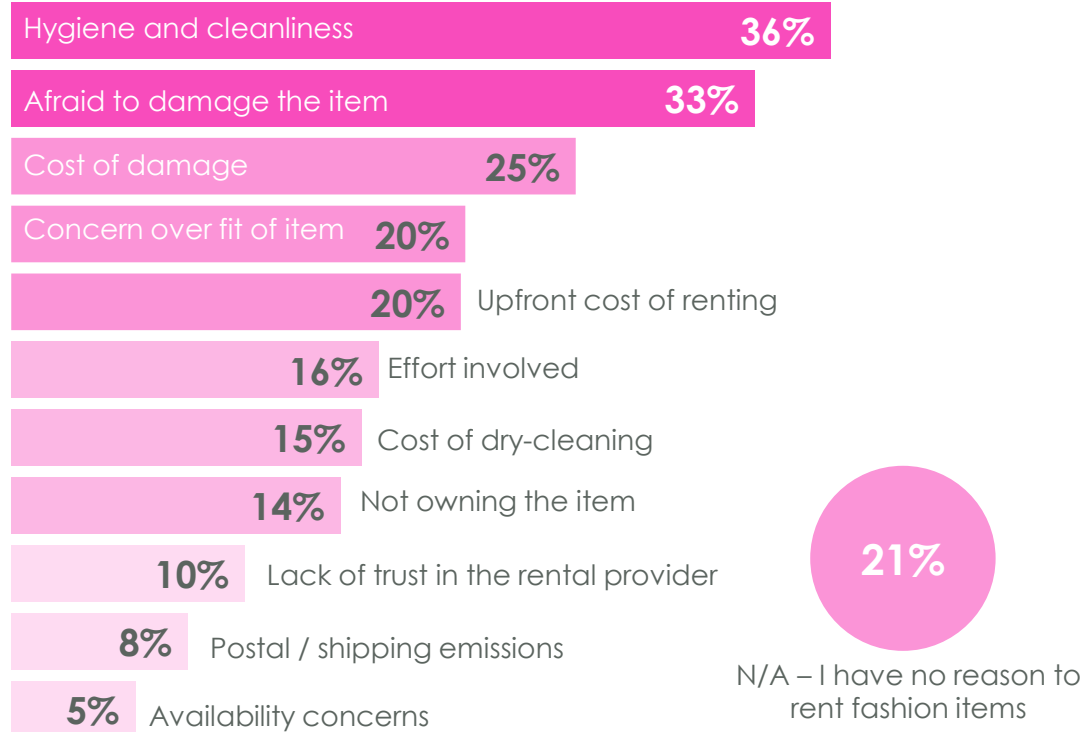
### Those particularly closed to clothes renting

**63%** Men  
**64%** Gen X  
**79%** Baby Boomers

**64%** Not concerned about the environment  
**63%** In-store shoppers

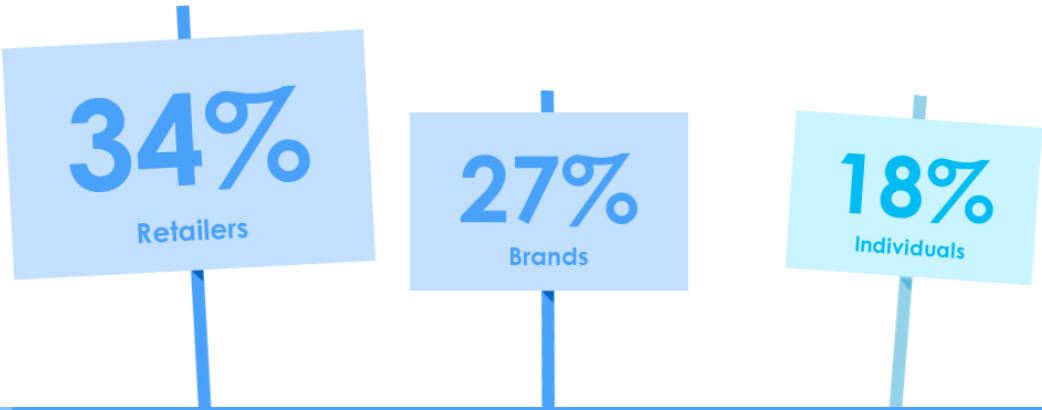
Never done this before, and **not** would be open to

### Reasons against clothes renting

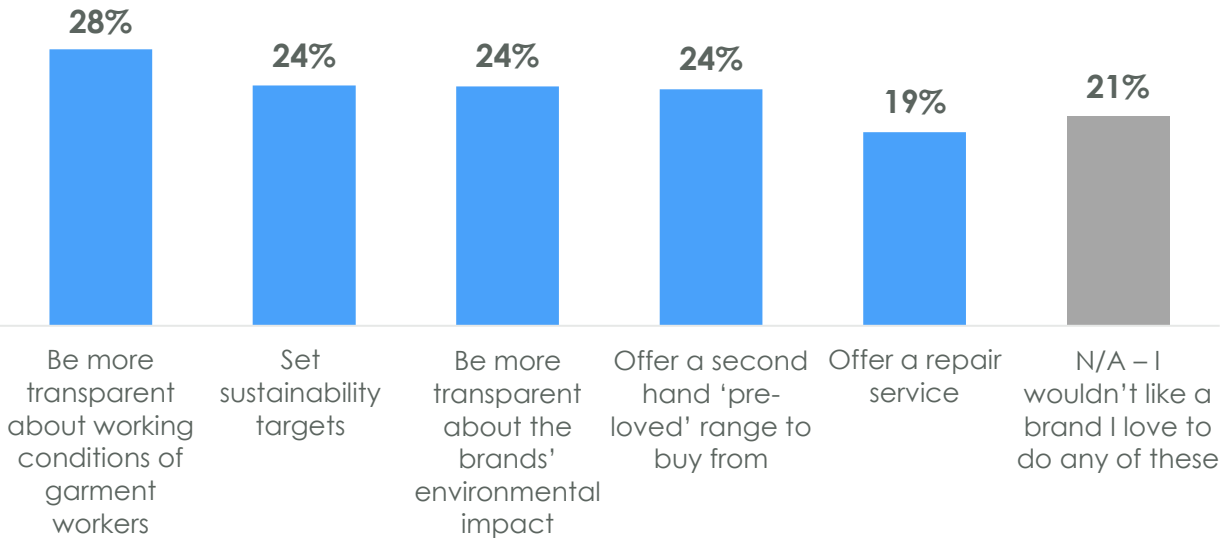


Q -Thinking about the fashion sector – who do you think is responsible for encouraging change to sustainable shopping behaviours?

In order to shift behaviour to more sustainable shopping, Fashion Brands & retailers are considered most responsible...



Q -Which of the following would you like to see the fashion brands you love do? – Top 5



Looking to the future 27% of consumers would like the brands they love to be more transparent about working conditions of garment workers, 24% would like to see sustainability targets, 24% believe brands should offer second-hand items and a further 24% would like brands to be more transparent about its environmental impact.

**However, there is large share of the population who wouldn't be interested to see brands engage in any sustainable initiatives (21%), increasing to 29% of 55+.**

## The key things to know...

1

Environmental concern has declined significantly in the last 4 years, likely accelerated by the cost-of-living crisis

2

Despite an increase in knowledge about sustainability in fashion, concern remains stagnant

3

However, behaviours are moving in a more sustainable direction but only when there's a cost saving

4

Usage of circular economy initiatives such as rental and using online marketplaces are growing in popularity, but consumers are looking towards brands and retailers to take responsibility in this space

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