



CONSUMER SURVEY REPORT

NOVEMBER 2018

*A baseline survey on EU consumer attitudes to sustainability
and supply chain transparency in the fashion industry.*

**FASHION
REVOLUTION**



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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%)

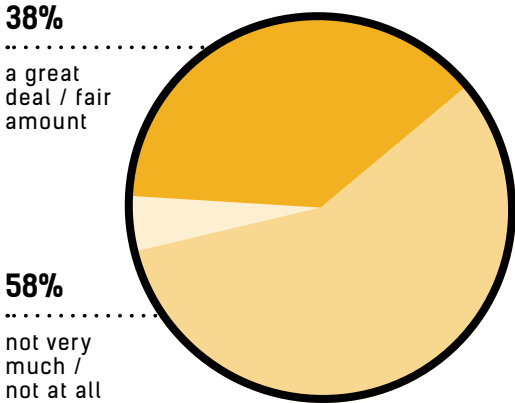
A large majority of consumers think that fashion brands should publish the factories used to manufacture their clothes (80%) and which suppliers they use to source the materials used in their clothing (77%).

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

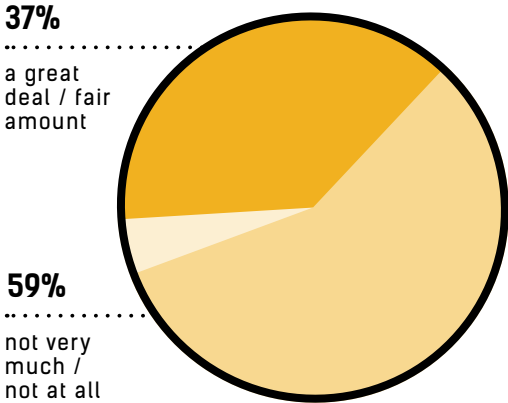
QUESTION 1

When purchasing an item of clothing, to what extent do people typically consider the social or environmental impact prior to deciding whether or not to purchase the item?

SOCIAL IMPACT



ENVIRONMENTAL IMPACT

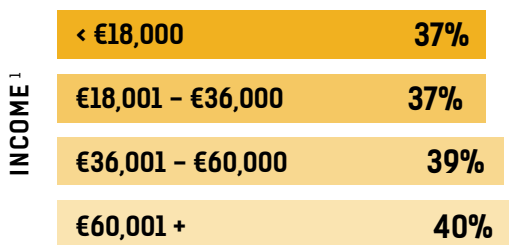
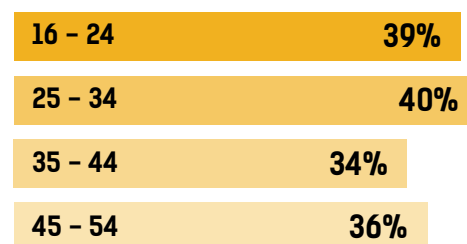
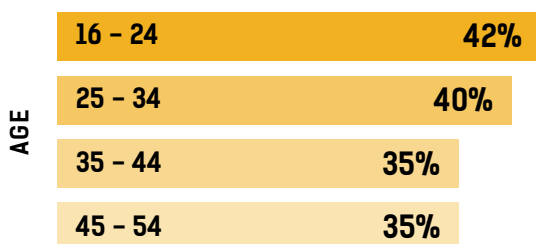
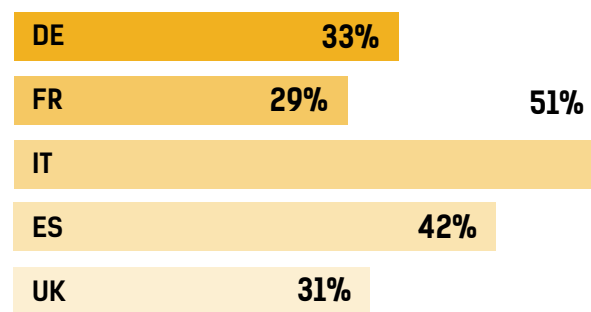
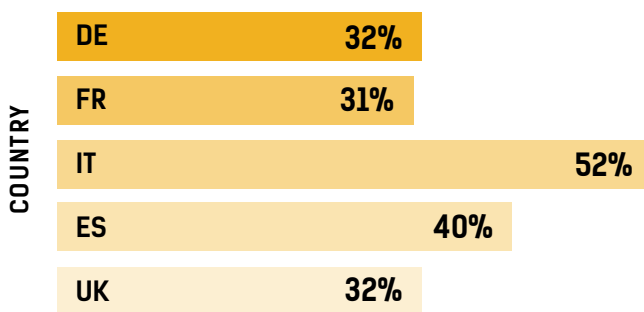




When purchasing an item of clothing, 38% of people consider the social impact prior to deciding whether or not to purchase the item.



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'.

Q1: REFLECTIONS

38% of people said that they consider social impacts when deciding whether to purchase an item of clothing.

8% of people said they consider social impacts a great deal. 30% of people said they consider social impacts a fair amount. 39% said they do not consider social impacts very much and 19% said they do not consider social impacts at all when deciding whether to purchase an item of clothing.

More people in Italy said they consider social impacts a great deal (11%) or fair amount (42%) when deciding whether to purchase an item of clothing than in any other country surveyed, whereas more people in Germany (44%) said they do not consider social impacts very much compared to other countries surveyed. More people in France (27%) said they do not consider social impacts at all when deciding whether to purchase an item of clothing than in any other country.

When you drill down into the data, it shows that 60% of 25-34 year olds in Italy said that they consider social impacts when deciding whether to purchase an item of clothing, the highest percentage across any demographic who said the same thing and compared to only 27% of their peers in the same age group in France. Fewer 35-44 years in France (21%) said that they consider social impacts when deciding whether to purchase an item of clothing than in any other demographic surveyed.

53% of women in Italy said they consider social impacts when deciding whether to purchase an item of clothing, compared to 31% in France, 32% in Germany and 34% in the UK.

52% of men in Italy said they consider social impacts when deciding whether to purchase an item of clothing, compared to 30% in France, 31% in the UK and 32% in Germany.

55% of people earning under €18,000 annual income in Italy said that they consider social impacts when deciding whether to purchase an item of clothing, compared to 26% of people earning the same in Germany.

Some similar patterns unfold when we asked whether people consider environmental impacts when purchasing an item of clothing.

37% of people said that they consider environmental impacts when deciding whether to purchase an item of clothing.

7% of people said they consider environmental impacts a great deal. 30% of people said they consider environmental impacts a fair amount. 40% said they do not consider environmental impacts very much and 19% said they do not consider environmental impacts at all when deciding whether to purchase an item of clothing.

27% of people in France said they do not consider environmental impacts at all, and 46% of people in Germany said they do not consider environmental impacts very much. However, 41% of people in Italy said they consider environmental impacts a fair amount, compared to 21% of people who said the same thing in France. 10% of people in Italy said they consider environmental impacts a great deal, compared to 6% in Germany.

50% of men in Italy said they consider environmental impacts when deciding whether to purchase an item of clothing, compared to 28% of men in France and 32% in the UK. 52% of women in Italy said they consider environmental impacts when deciding whether to purchase an item of clothing, compared to 30% in France and 31% in the UK.

More 25-34 year olds in Italy (58%) said they consider environmental impacts when deciding whether to purchase an item of clothing than their peers in the same age group or any other demographic. Fewer 35-44 year olds in France (21%) said they consider environmental impacts when deciding whether to purchase an item of clothing than their peers in the same age group or any other demographic.

51% of people earning under €18,000 annual income in Italy said that they consider environmental impacts when deciding whether to purchase an item of clothing, compared to 27% of people earning the same in Germany.

¹ Income groups are arranged by income in euros, not in the distribution/value of those incomes in each country. This means someone with €45,000 income in Spain will likely be doing much better than someone with the same income in Germany, due to the different cost of living in each country.

QUESTION 2

Which, if any, of the statements below do people consider to be important when choosing the following products for themselves and their family?

It is important to me that the clothing (including shoes and accessories) I buy...

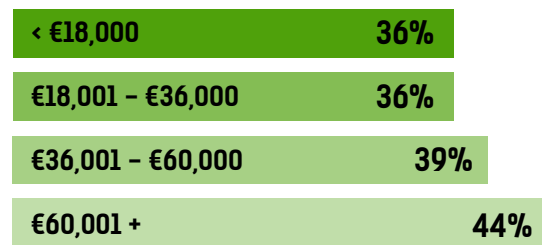
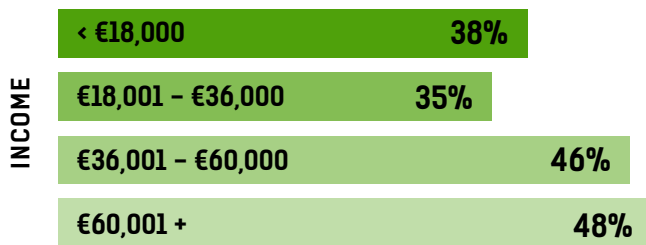
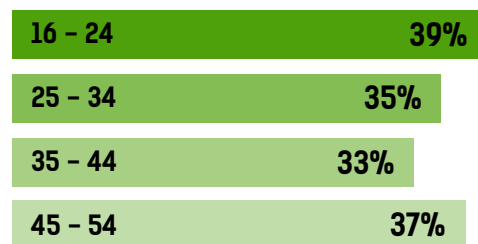
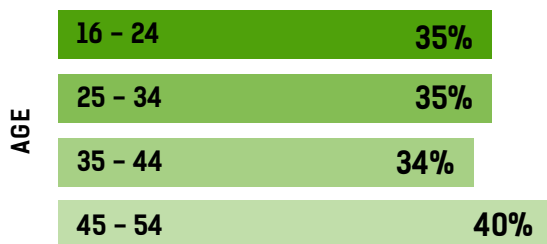
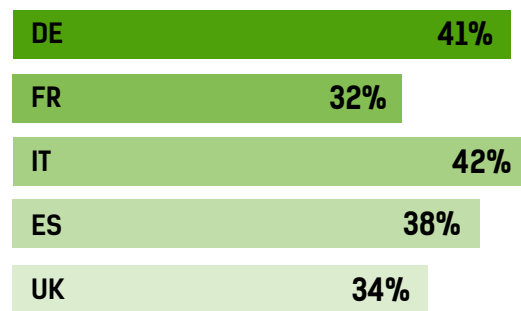
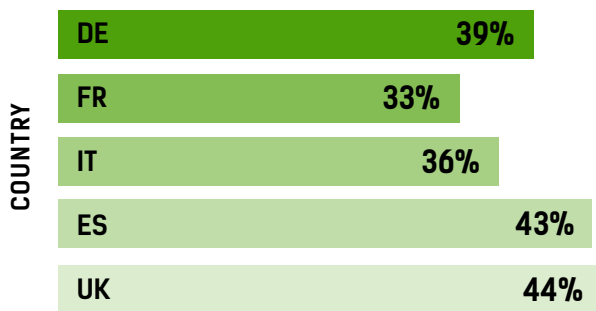
- are made by workers paid a fair, living wage;
- are produced in a way that is not harmful to the environment;
- are produced in safe working conditions;
- are produced without harming animals;
- are produced locally;
- use recycled materials/recycled packaging;
- none of these things are important when it comes to buying clothing.



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.



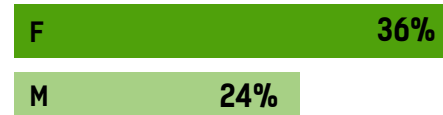
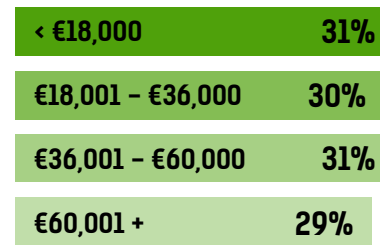
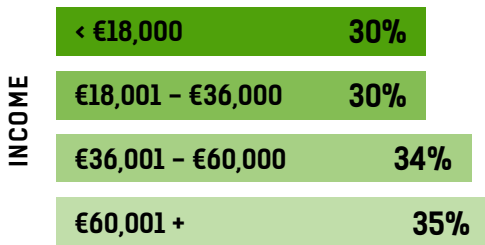
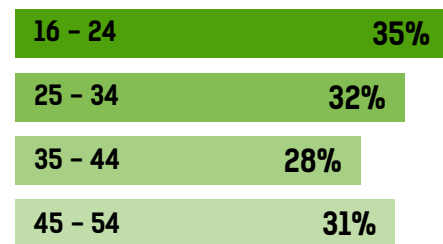
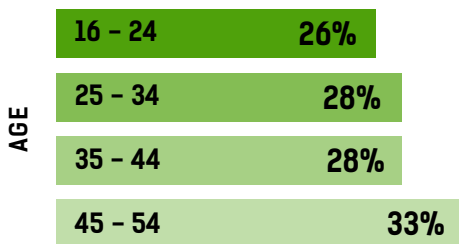
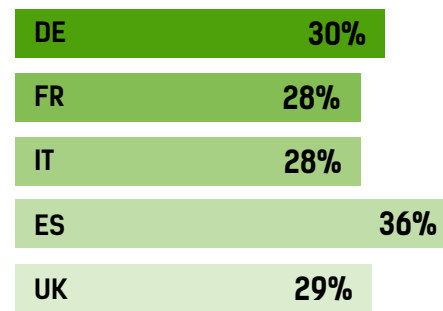
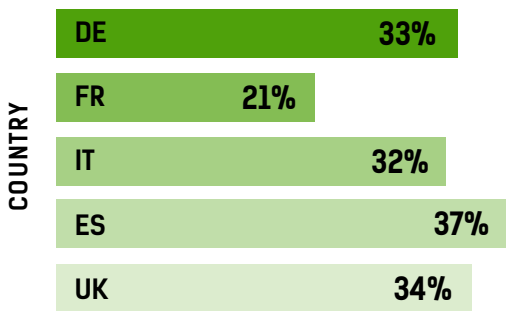
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



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



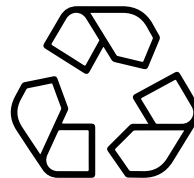
30% of people said it is important that the clothing (including shoes & accessories) they buy is produced without harming animals.



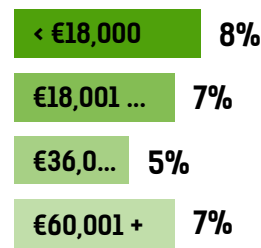
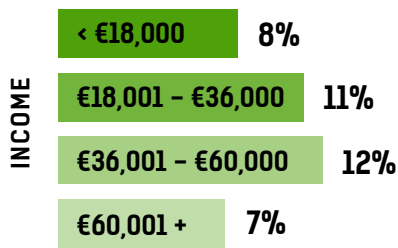
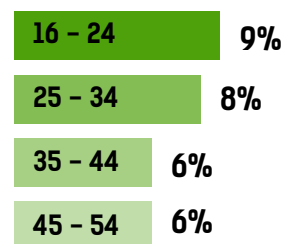
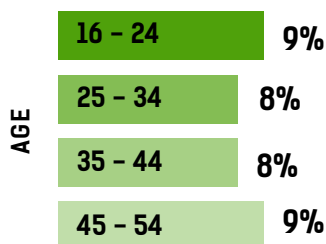
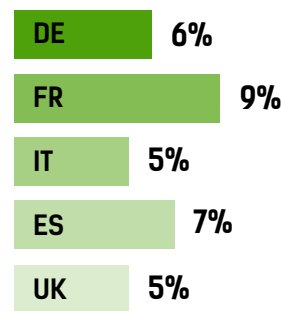
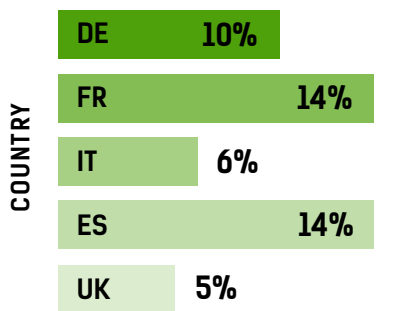
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



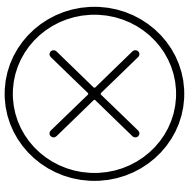
10% of people said it is **important** that the clothing (including shoes & accessories) they buy is produced locally.



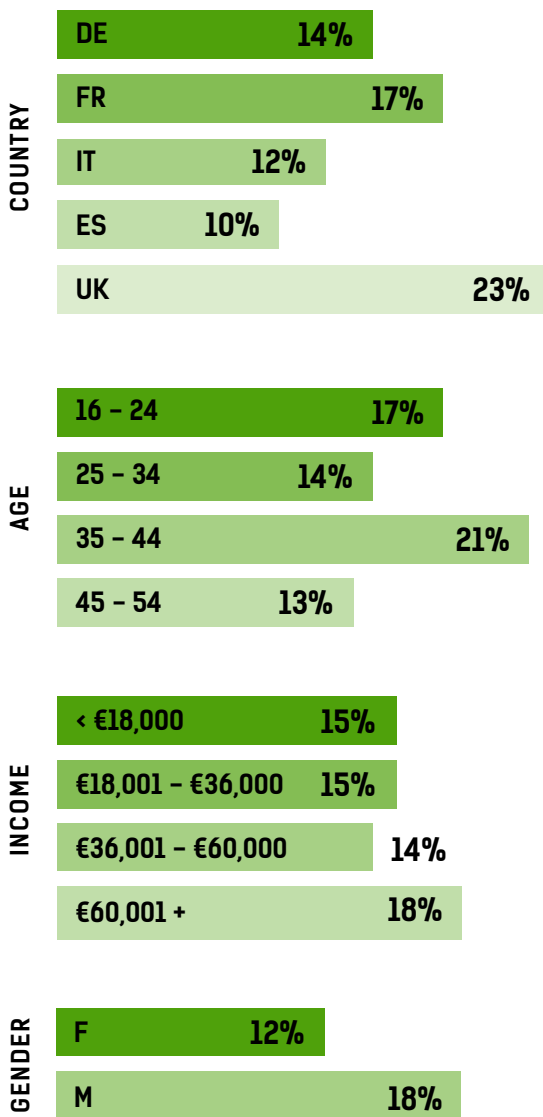
6% of people said it is **important** that the clothing (including shoes & accessories) they buy is made using recycled materials.



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'.

Q2: REFLECTIONS

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%).

More people in the UK (44%) said that buying clothes made by workers paid a fair, living wage was important than in any other country surveyed.

In fact, more 16–24 year olds (45%) and 45–54 year olds (49%) in the UK said that buying clothes made by workers paid a fair, living wage was important than in any other country surveyed. Likewise, more people earning under €18,000 annual income in the UK (46%) said that buying clothes made by workers paid a fair, living wage was important than in any other country surveyed.

More people in Spain (36%) said that buying clothes made without harming animals was important, compared to any other country. Likewise, more people in Spain (37%) said that buying clothes produced in safe working conditions was important than in any other country surveyed.

In fact, 44% of 35–44 year olds in Spain said that buying clothes produced in safe working conditions was important, compared to just 13% of 35–44 year olds in France.

42% of women in Spain said that buying clothes made without harming animals was important, compared to 30% of men in Spain and 32% of women in the UK.

49% of people earning over €60,001 annual income in Spain said that buying clothes made without harming animals was important, compared to just 17% of people with the same income in France.

More women in the UK (40%) said that buying clothes made in safe working conditions was important than in any other country surveyed, and compared to 27% of men in the UK.

52% of people earning over €60,001 in Spain said that buying clothes made in safe working conditions was important, compared to 29% of people earning the same in the UK and 34% in France. However, 50% of people earning over €60,001 in France said

that buying clothes made without harming the environment was important, compared to 39% of people earning the same in Spain and 40% in the UK.

42% of people in Italy said that buying clothes made without harming the environment was important, compared to 32% in France and 34% in the UK.

48% of women in Spain and 46% of women in the UK said that buying clothes made by workers paid a fair, living wage was important, compared to 35% of women in France, whereas 15% of women in France said that buying clothes that are produced locally was important, compared to just 4% of women in Italy.

14% of people in France and Spain said that buying clothes that are produced locally was important, compared to just 5% of people in the UK and 6% in Italy.

19% of people earning between €36,001–€60,000 in Spain and France said that buying clothes that are produced locally was important, compared to just 6% of people making the same income in the UK and 9% of people earning under €18,000 in France.

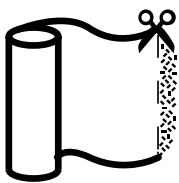
More men in the UK (42%) said that buying clothes made by workers paid a fair, living wage was important compared to any other country surveyed, whereas 43% of men in Germany and Italy said that buying clothes made without harming the environment was important, compared to 30% of men in France and 35% of men in the UK.

9% of women in France said that buying clothes made with recycled materials was important compared to just 3% of women in Italy. More 16–24 year olds in Germany (15%) said that buying clothes made using recycled materials was important than in any other country or age group surveyed. However, 14% of people earning less than €18,000 annual income in France said that buying clothes made using recycled materials was important, compared to just 4% of people earning the same in Italy and just 3% of people earning over €60,001 in France.

QUESTION 3

To what extent do people agree or disagree with the following statements:

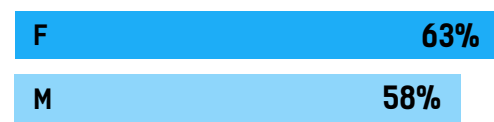
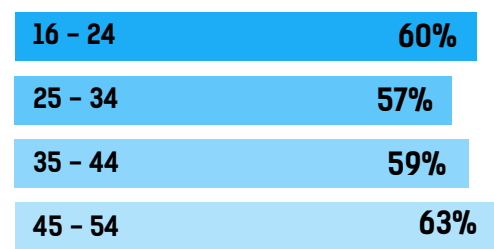
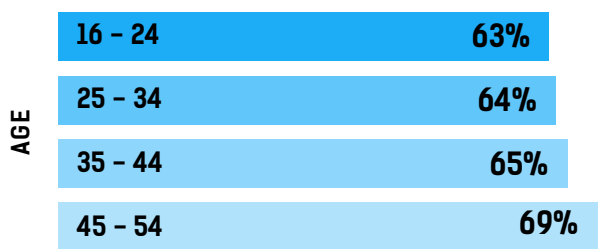
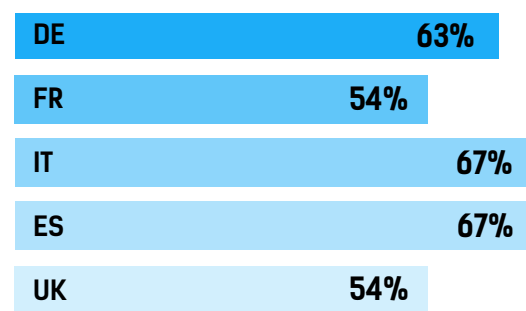
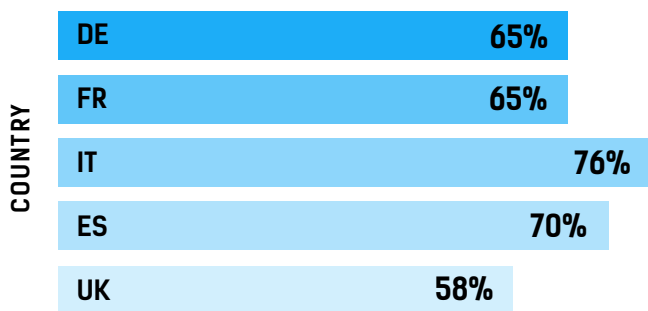
- I would like fashion brands to tell me about **where the materials used in their products come from.**
- I am interested in learning about what, if anything, fashion brands do to **minimise their impact on the environment.**
- I am interested in learning about what fashion brands do to **protect their workers' human rights.**
- I am interested in learning about what fashion brands do to **improve the lives of people** in the societies where they manufacture their products.
- I would like to know **how my clothes were manufactured.**



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



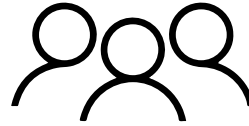
61% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to minimise their impact on the environment.'



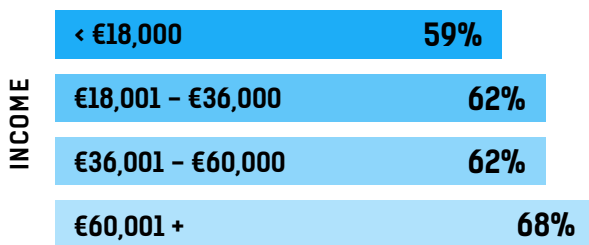
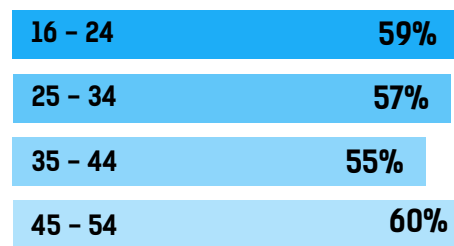
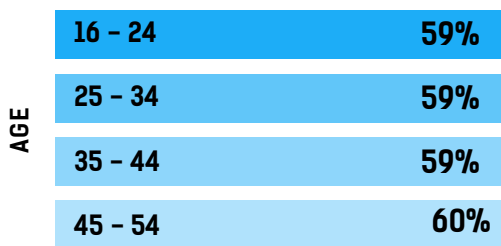
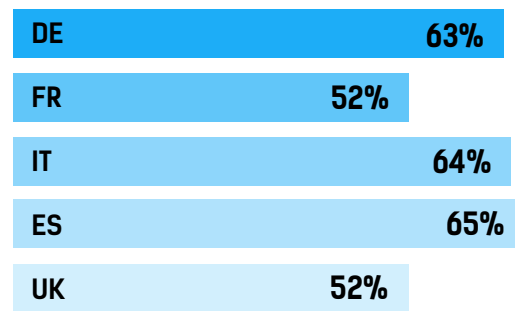
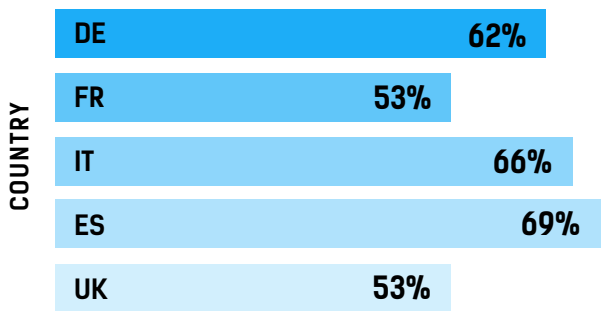
Data represents the percentage of those who answered 'strongly agree / somewhat agree'.



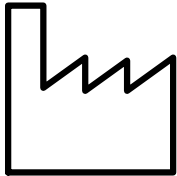
61% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to protect their workers' human rights.'



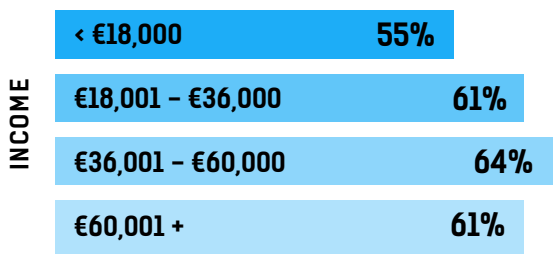
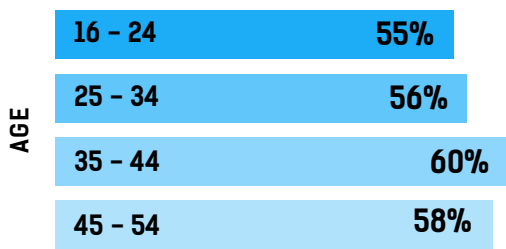
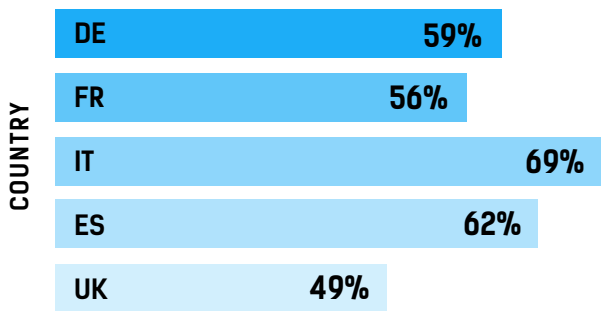
59% strongly / somewhat agreed that they are 'interested in learning about what fashion brands do to improve the lives of people in the societies where they manufacture their products.'



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'.

Q3: REFLECTIONS

The majority of people want to know how their clothes were manufactured, where the materials used in their clothing comes from and what fashion brands are doing to minimise environmental impacts, protect workers' rights and improve the lives of people in the societies where their clothes are made.

67% of people would like fashion brands to tell them where the materials used in their products come from, with 32% of people strongly agreeing with this statement. 59% would like to know how their clothes are manufactured, with 25% strongly agreeing with this statement.

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.

76% of people in Italy would like fashion brands to tell them where the materials used in their products come from, compared to 58% of people in the UK.

67% of consumers would like fashion brands to tell them where the materials used in their products come from.

42% of people in Spain strongly agreed that they would like fashion brands to tell them where the materials used in their products come from, compared to 20% of people in the UK .

80% of women in Italy would like fashion brands to tell them where the materials used in their products come from, compared to 72% of men in Italy and 61% of women in the UK.

More 35–44 year olds in Spain (76%) would like fashion brands to tell them where the materials used in their products come from than any other age group in any country. But overall, more 45–54 year olds (69%) would like fashion brands to tell them where the materials used in their products come from than in any other age group.

More people earning over €60,001 in Italy (86%) would like fashion brands to tell them where the materials used in their products come from than in any other demographic. 81% of those earning €36,001–€60,000 in Italy said the same thing, which is also more than in any other demographic.

67% of people in Italy and Spain are interested in learning about what fashion brands are doing to minimise their impacts on the environment, compared to 54% of people in France and the UK.

69% of women in Spain are interested in learning about what fashion brands are doing to minimise their impacts on the environment, compared to 56% of women in the UK, 52% of men in the UK and 49% of men in France.

72% of 35–44 year olds in Spain are interested in learning about what fashion brands are doing to minimise their impacts on the environment, compared to 48% of their peers in the same age group in France and the UK.

More people earning over €60,001 in Italy (80%) are interested in learning about what fashion brands are doing to minimise their impacts on the environment than in any other demographic, followed by those earning €36,001–€60,000 in Spain (75%).

69% of people in Spain are interested in learning about what fashion brands are doing to protect their workers' human rights, compared to 53% of people in France and the UK.

73% of women in Spain are interested in learning about what fashion brands are doing to protect their workers' human rights, compared to 47% of men in France and the UK.

More 35–44 year olds in Spain (75%) are interested in learning about what fashion brands are doing to protect their workers' human rights than in any other age group in Spain or any age group in other countries surveyed.

More people earning between €36,001–€60,000 in Spain (81%) are interested in learning about what fashion brands are doing to protect their workers' human rights than in any other demographic.

68% of women in Spain are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products, compared to 56% of women in the UK and 45% of men in France. Overall, 62% of women and 59% of men are interested in learning what fashion brands do to improve the lives of people in the societies where their products are manufactured.

More 35–44 year olds in Spain (69%) are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products than in any other age group in Spain or country surveyed.

72% of people earning between €36,001–€60,000 in Spain are interested in learning what fashion brands do to improve the lives of people in the societies where they manufacture their products, compared to 50% earning the same in the UK and 63% of those earning under €18,000 in Spain.

69% of people in Italy would like to know how their clothes are manufactured, compared to 49% in the UK.

72% of women in Italy would like to know how their clothes are manufactured, compared to 66% of men in Italy, 51% of women in the UK and 47% of men in the UK.

72% of 35–44 year olds in Spain would like to know how their clothes are manufactured, compared to 46% of their peers in the same age group in the UK.

78% of people earning over €60,001 in Italy would like to know how their clothes are manufactured, compared to 50% of people earning the same in France.

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.

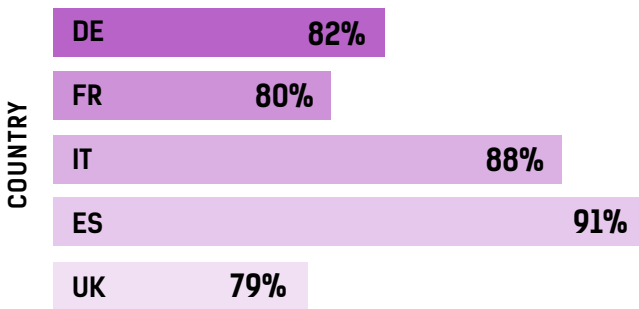
QUESTION 4

How important is it to people that fashion brands tackle the following issues in order to reduce their long-term impacts on the world?

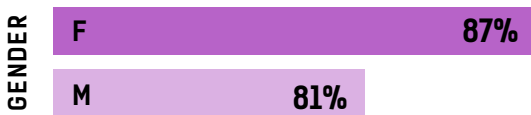
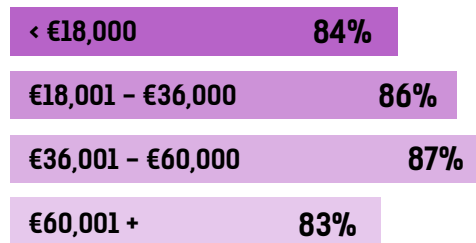
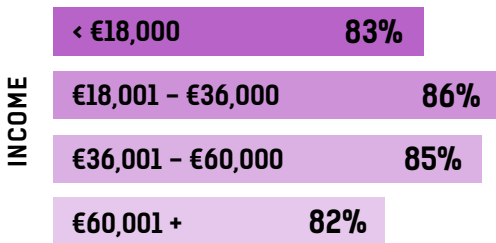
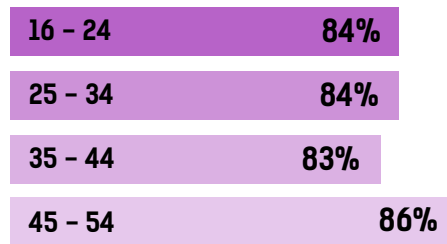
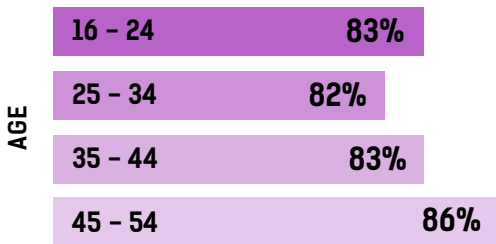
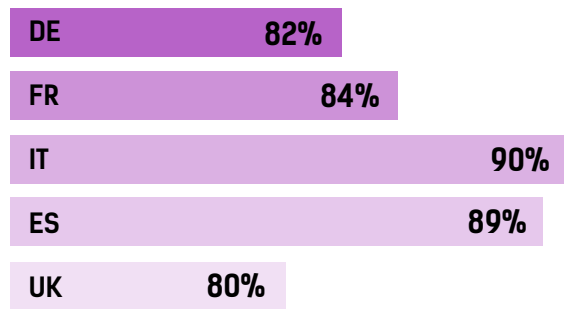
- Global poverty
- Climate change
- Protection of the environment
- Gender inequality



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



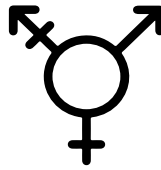
85% think it is **very/somewhat important** that fashion brands tackle climate change.



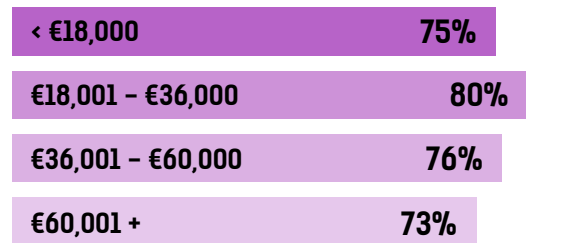
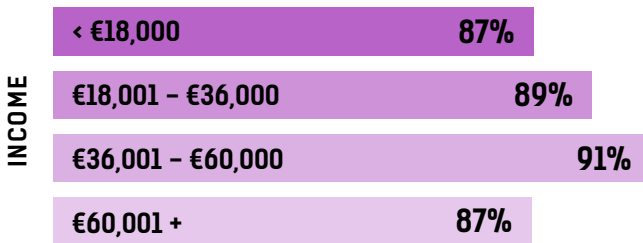
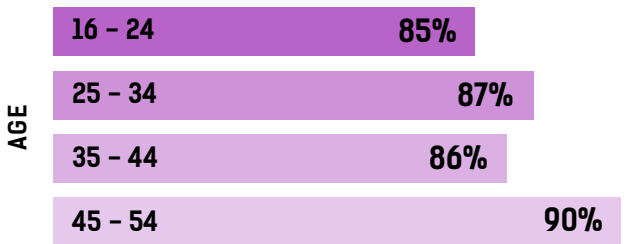
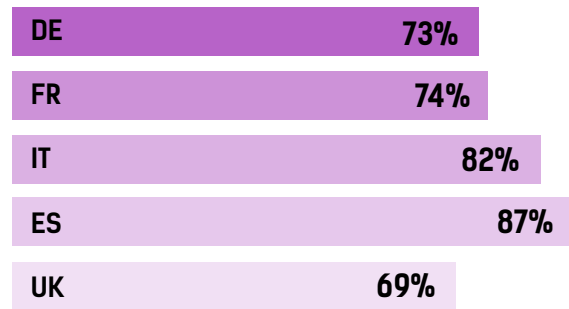
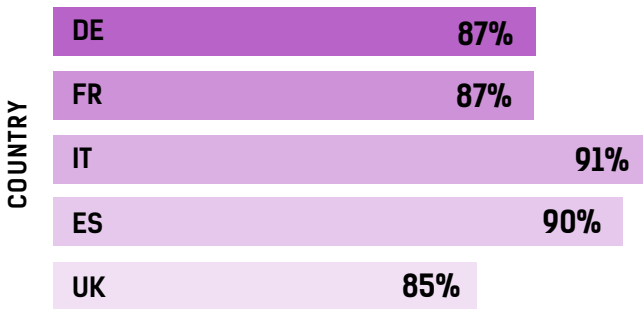
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



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'.

Q4: REFLECTIONS

A large majority of people think it is important for fashion brands to reduce their long-term impacts on the world by tackling global poverty, climate change, environmental protection and gender inequality.

Global poverty

84% of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty, with 50% saying it is very important.

91% of people in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty, compared to 79% of people in the UK.

87% of women and 81% of men think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty. 93% of women in Spain and 91% of women in Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty, compared to 76% of men in the UK and 77% of men in France.

More 44–54 year olds (86%) think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty than people in younger generations.

94% of 45–54 year olds and 91% of 35–44 year olds in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing global poverty, compared to 75% of 16–24 year olds in France and 75% of 35–44 year olds in the UK.

Climate change

85% of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change, with 56% saying that it is very important.

90% of people in Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change, compared to 80% of people in the UK.

86% of women and 83% of men think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change.

90% of women in Spain and Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change, compared to 79% of men in the UK.

More 45–54 year olds in Italy (93%) think it is important for fashion brands to reduce their long-term impacts on the world by addressing climate change than in any other age group in any countries surveyed.

Environmental protection

88% of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection, with 59% saying that it is very important.

91% of people in Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection, compared to 85% of people in the UK.

93% of women in Italy and 92% of women in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection, compared to 85% of men in the France.

90% of 45–54 year olds think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection, compared to 85% of 16–24 year olds. In fact, 94% of 45–54 year olds in Italy and Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection.

95% of people earning between €36,001–€60,000 and 94% of those earning over €66,001 in Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing environmental protection.

Gender inequality

77% of people think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality, with 41% saying that it is very important.

87% of people in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality, compared to 69% of people in the UK.

81% of women and 72% of men think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality.

90% of women in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality, compared to 73% of women in the UK, 78% in Germany, 79% in France and 85% in Italy.

81% of women think it is important for fashion brands to tackle gender inequality.

83% of men in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality, compared to 78% of men in Italy, 68% in France and Germany and 65% in the UK.

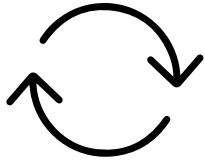
It is interesting that more men in Spain and Italy think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality than women in the UK.

90% of 45–54 year olds and 88% of 35–44 year olds in Spain think it is important for fashion brands to reduce their long-term impacts on the world by addressing gender inequality, compared to 61% of 16–24 year olds in Germany and 67% of 35–44 year olds in France.

QUESTION 5

To what extent do people agree or disagree with the following statements?

- **The Government** has a role to play in ensuring clothing (including shoes and accessories) is sustainably produced.
- Fashion brands should be **required by law to respect the human rights** of everybody involved in making their products.
- Fashion brands should be **required by law to protect the environment** at every stage of making their products.
- Fashion brands should be **required by law** to provide information about the **social impacts** of their business.
- Fashion brands should be **required by law** to provide information about the **environmental impacts** of their business.
- Fashion brands should be **required by law** to say if they are paying the workers who make their products a **fair, living wage**.
- Fashion brands **should do more to improve the lives of women** making their clothes, shoes or accessories.
- Clothing manufacturers **provide a source of income for women** who would not have one otherwise.



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%

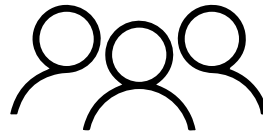
GENDER	F	71%
	M	64%

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'.

Q5: REFLECTIONS

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 or accessories.

75% of people in Italy and Spain agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced, compared to 56% in Germany and 63% of people in the UK.

Only 7% disagreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced. Notably, 12% of people in Germany disagreed with this statement.

Interestingly, 71% of women agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced, compared to 64% of men. If you dig a little deeper into the data, it shows that 80% of women in Spain agreed with this statement, compared to 54% of men in Germany.

73% of 16–24 year olds in Spain agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced, compared to 58% of their peers in the same age group in Germany.

More 45–54 year olds agreed that the government has a role to play in ensuring that clothing (including shoes and accessories) is sustainably produced than in younger generations.

82% of people in Spain and 81% of people in Italy agree that fashion brands should be required by law to respect the human rights of everybody involved in making their products, compared to 73% of people in Germany and 74% of people in the UK.

Only 4% of people disagreed that fashion brands should be required by law to respect the human rights of everybody involved in making their products.

81% of women and 74% of men agreed that fashion brands should be required by law to respect the human rights of everybody involved in making their products.

87% of women in Spain, compared to 70% of men in the UK and Germany, agreed that fashion brands should be required by law to respect the human rights of everybody involved in making their products.

76% of people in Italy and 75% of people in Spain agreed that fashion brands should be required by law to provide information about the social impacts of their business, compared to 59% of people in the UK and 62% of people in Germany.

Only 6% disagreed that fashion brands should be required by law to provide information about the social impacts of their business.

Again, more 45–54 year olds (79%) agreed that fashion brands should be required by law to respect the human rights of everybody involved in making their products than in younger generations.

76% of people in Italy and 75% of people in Spain agreed that fashion brands should be required by law to provide information about the social impacts of their business, compared to 59% of people in the UK and 62% of people in Germany.

Only 6% of people disagreed that fashion brands should be required by law to provide information about the social impacts of their business.

71% of women and 65% of men agreed that fashion brands should be required by law to provide information about the social impacts of their business. 80% of women in Spain agreed with this statement, compared to 56% of men in the UK.

71% of 45–54 year olds agreed that fashion brands should be required by law to provide information about the social impacts of their business, compared to 63% of 25–34 year olds.

81% of people in Spain and 80% of people in Italy agreed that fashion brands should be required by law to protect the environment at every stage of making their products, compared to 69% of people in the UK, 70% of people in Germany and 75% of people in France.

Only 4% of people disagreed that fashion brands should be required by law to protect the environment at every stage of making their products.

77% of women and 73% of men agreed that fashion brands should be required by law to protect the environment at every stage of making their products. 86% of women in Spain agreed that fashion brands should be required by law to protect the environment at every stage of making their products, compared to 70% of women in Germany and 67% of men in the UK.

More 45–54 year olds (77%) agreed that fashion brands should be required by law to protect the environment at every stage of making their products than in younger generations.

78% of people in Italy and 77% of people in Spain agreed that fashion brands should be required by law to provide information about the environmental impacts of their business, compared to 65% of people in the UK.

Only 5% disagreed that fashion brands should be required by law to provide information about the environmental impacts of their business.

75% of women and 69% of men agreed that fashion brands should be required by law to provide information about the environmental impacts of their business. 83% of women in Spain agreed with this statement, compared to 61% of men in the UK.

More 45–54 year olds (75%) agreed that fashion brands should be required by law to provide information about the environmental impacts of their business than in younger generations.

76% of people in Spain and 75% of people in Italy agreed that fashion brands should be required by law to say if they are paying the workers who make their products a fair, living wage, compared to 66% of people in Germany, 71% in the UK and 72% in France.

Only 5% disagreed that fashion brands should be required by law to say if they are paying the workers who make their products a fair, living wage.

76% of women and 68% of men 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. 81% of women in Spain agreed with this statement, compared to 63% of men in France.

76% of people in Spain and 75% of people in Italy and France said that fashion brands should do more to improve the lives of women making their clothes, shoes or accessories, compared to 67% of people in the UK and 68% of people in Germany.

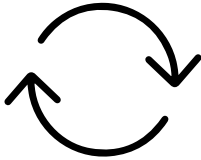
77% of women and 67% of men said that fashion brands should do more to improve the lives of women making their clothes, shoes or accessories. 83% of women in Spain agreed with this statement, compared to 62% of men in the UK. 75% of 45–54 year olds agreed with this statement, compared to 66% of 25–34 year olds.

53% of people agreed that clothing manufacturers provide a source of income for women that would not otherwise have one. In fact, 57% of people in the UK agreed with this statement, compared to 49% in Germany and Spain.

QUESTION 6

When choosing a fashion brand to buy, how important is it to people that brands...

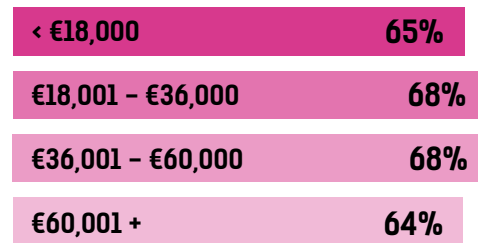
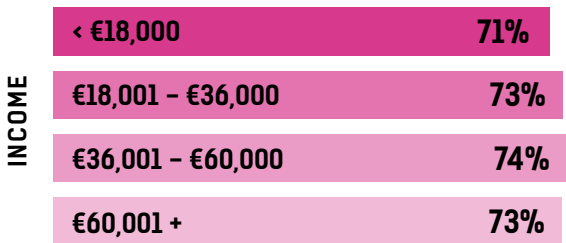
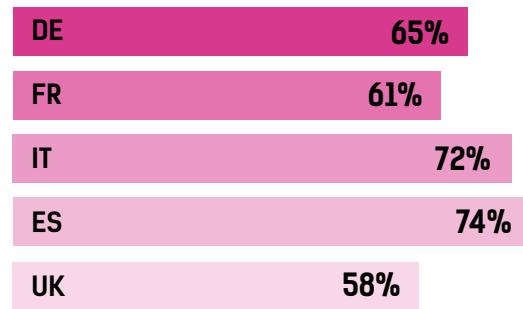
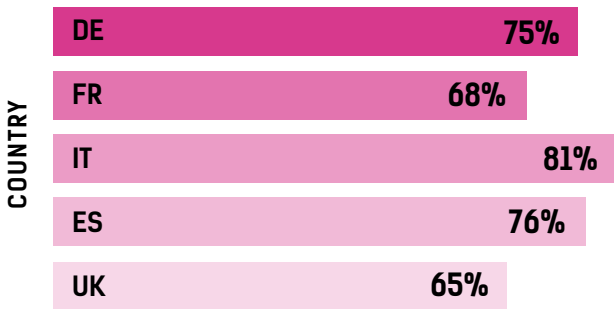
- Publish how their products are sustainable on the packaging;
- Share detailed information about wages and working conditions for the people in its global supply chain;
- Explain what their products are made from on the packaging;
- Make it clear where they source their raw materials, components or ingredients from and who manufactured the product;
- Provide information about how they apply socially responsible practices;
- Provide information about how they apply environmentally responsible practices.



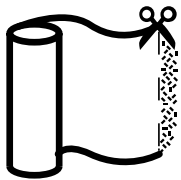
73% said it is **very or somewhat important** for fashion brands to publish how their products are sustainable on the packaging.



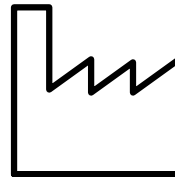
66% said it is **very or somewhat important** for fashion brands to share detailed information about wages and working conditions for the people in its global supply chain.



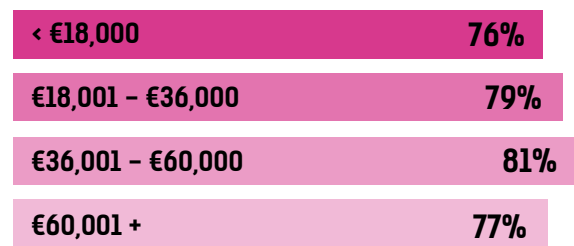
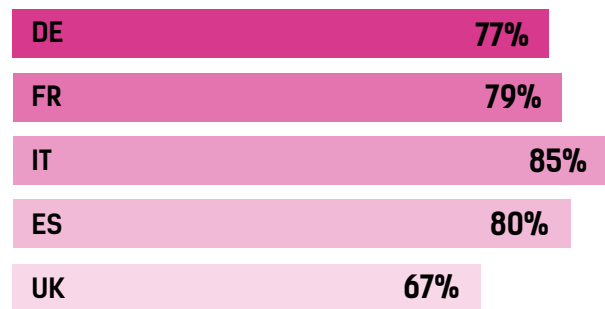
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



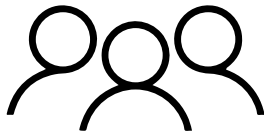
79% said it is **very or somewhat important** for fashion brands to explain what their products are made from on the packaging.



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.



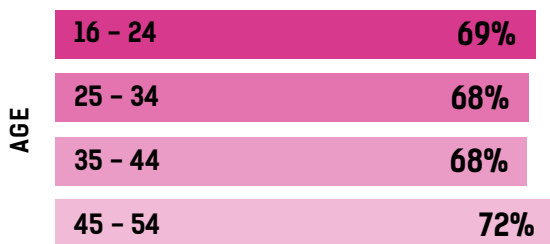
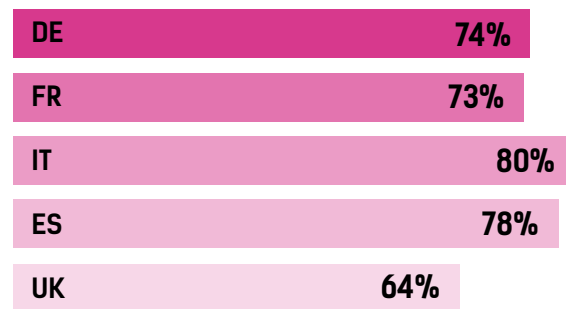
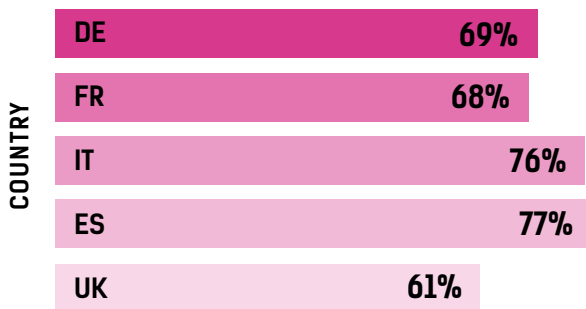
Data represents the percentage of those who answered 'very important' / 'somewhat important'.



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'.

Q6: REFLECTIONS

When choosing a fashion brand to buy, the majority of people think it is important for fashion brands to publish where clothes are manufactured, how products are manufactured and where materials are sourced.

The majority of consumers also said it is important for fashion brands to explain how the products are sustainable, what wages and working conditions are like for people working in the supply chain and how brands are applying socially and environmentally responsible practices.

When choosing a fashion brand to buy, consumers said that 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%)

73% of women and 70% of men said it is important for fashion brands to publish how their products are sustainable on the packaging.

80% of women in Italy said it is important for fashion brands to publish how their products are sustainable on the packaging, compared to 61% of men in the UK. Similarly, 83% of women in Italy said that it is important for fashion brands to explain what their products are made from on the packaging, compared to 82% of men in Italy and 68% of men in the UK.

More 16–24 year olds in Spain (77%) said that it is important for fashion brands to publish how their products are sustainable on the packaging than their peers in the same age group.

80% of 45–54 year olds said that it is important for fashion brands to explain what their products are made from on the packaging, compared to 74% in younger age groups.

At least 80% of women in France, Germany, Italy and Spain said that it is important for fashion brands

to make it clear where they source materials, ingredients and components from and who manufactured their products, compared to 71% of women in the UK.

68% of women and 64% of men said that it is important for fashion brands to share detailed information about the wages and working conditions for people in its global supply chain. Notably, 75% of women in Spain said it is important for fashion brands to share detailed information about the wages and working conditions for people in its global supply chain, compared to 53% of men in the UK.

80% of people in Italy said that it is important for fashion brands to provide information about how they apply environmentally responsible practices, compared to 65% of people in the UK. 77% of people in Spain said that it is important for fashion brands to provide information about how they apply socially responsible practices, compared to 62% of people in the UK.

80% of women in Italy said that it is important for fashion brands to provide information about how they apply environmentally responsible practices, compared to 60% of men in the UK.

79% of women in Spain said that it is important for fashion brands to provide information about how they apply socially responsible practices, compared to 56% of men in the UK.

86% of people earning between €36,001–€60,000 in Spain and 81% of people earning the same in Italy said that it is important for fashion brands to provide information about how they apply environmentally responsible practices. Similarly, 85% of people earning between €36,001–€60,000 in Spain said that it is important for fashion brands to provide information about how they apply socially responsible practices, compared to 59% of people from the same income group in the UK.

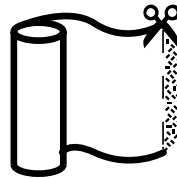
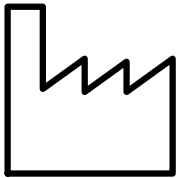
79% of 35–44 year olds in Spain said that it is important for fashion brands to provide information about how they apply socially responsible practices, compared to 59% of people in the same age group in the UK.

80% of 35–44 year olds in Spain and 83% of 45–54 year olds in Italy said that it is important for fashion brands to provide information about how they apply environmentally responsible practices.

QUESTION 7

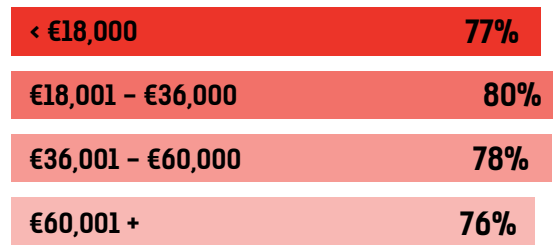
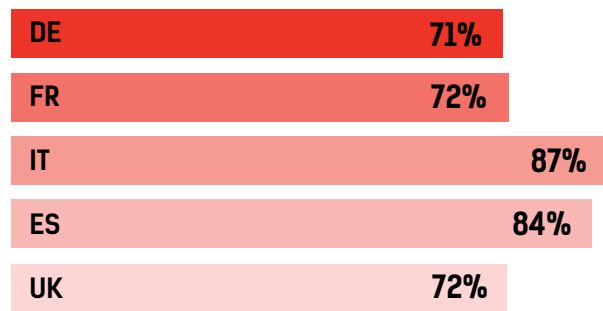
Do people think fashion brands should...

- Publish which factories are used to manufacture their clothes;
- Publish which suppliers they use to source the materials used in their clothing.



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.



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

Q7: REFLECTIONS

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

88% of people in Italy think that fashion brands should publish which factories are used to manufacture their clothes, compared to 72% of people in the UK.

There is not much overall difference between men and women. 80% of women and 79% of men think that fashion brands should publish which factories are used to manufacture their clothes. However, 88% of women in Italy think that fashion brands should publish which factories are used to manufacture their clothes, compared to 71% of men in the UK.

When we look at age groups, 81% of 45–54 year olds think that fashion brands should publish which factories are used to manufacture their clothes, compared to 76% of 35–44 year olds.

81% of people earning between €18,001 and €60,000 think that fashion brands should publish which factories are used to manufacture their clothes, compared to 80% of those earning over €60,001 and 78% of those earning under €18,000.

87% of people in Italy think that fashion brands should publish which suppliers they use to source the materials used in their clothing, compared to 71% of people in Germany.

78% of women and 76% of men think that fashion brands should publish which suppliers they use to source the materials used in their clothing. 88% of women in Italy, compared to 69% of men in the UK, think that fashion brands should publish which suppliers they use to source the materials used in their clothing.

79% of 45–54 year olds think that fashion brands should publish which suppliers they use to source the materials used in their clothing, compared to 76% of people under the age 45. 88% of people aged 45+ in Italy think that fashion brands should publish which suppliers they use to source the materials used in their clothing.

91% of people earning between €18,001–€36,000 in Italy and €36,001–€60,000 in Spain think that fashion brands should publish which suppliers they use to source the materials used in their clothing, compared to 68% of people earning between €36,001–€60,000 in the UK.

77% of people think fashion brands should publish which suppliers they use to source materials used in their clothing.

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.

RECOMMENDATIONS FOR FASHION BRANDS

1 Provide more social and environmental information to your customers.

- Disclose your suppliers: The large majority of consumers think fashion brands should publish their manufacturers (80%) and which suppliers they use to source materials (77%).

2 Prioritise and communicate social and environmental issues that people care about the most.



- More consumers care about workers being paid fair, living wages and environmental protection than animal welfare, recycling and local manufacturing. Consider how you might better prioritise living wages and environmental protection throughout the business and supply chain. Consider how you might help consumers better understand your efforts to protect animal welfare, use recycled materials and build local supply chains and, crucially, explain why these issues are important.
- The large majority of consumers it is important that fashion brands are addressing global poverty, climate change, environmental protection and gender inequality. Tell your customers what you're doing to tackle these issues.
- Consumers expect brands to be doing more to improve the lives of women making the products they buy (72% said this is important).

3 Include more of info/data on your packaging (over 70% of consumers said important).

- Make it clear how products are made, where manufactured/sourced and how responsible practices are implemented.

RECOMMENDATIONS FOR GOVERNMENTS & POLICYMAKERS

1 Better recognise the responsibility that policymakers & governments have in ensuring that clothing is an important part of sustainable consumption.

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

2 Commit to considering what interventions and regulations could be adopted or better implemented based on what your own citizens say is important.

- The majority of people think that the government should be regulating fashion brands to protect human rights and the environment and to be more transparent about their business practices and impacts.

3 Prioritise more funding and technical support in order to achieve sustainable production and consumption in the fashion industry.



RECOMMENDATIONS FOR CITIZENS



- 1 Many people think about the social and environmental impacts of clothing when they're out shopping. However, too many people do not consider these impacts at all when they're buying clothes.**

 - We encourage everyone to ask more questions about the social and environmental impacts of the clothes you want to buy when you're out shopping. Get into the habit! Educate yourself before you hit the shops. Research the brands and products you might want to buy before you go shopping. Are you comfortable with the level of information you can access? If not, ask for more evidence from the brands you love.
- 2 Ask the brands you buy #whomademyclothes**

 - Ask the brands you buy #whomademyclothes in order to demand more transparency about the social and environmental impacts of your clothing purchases.
- 3 Write to your elected officials and ask them to do more.**

 - Write to your elected officials and ask them to do more to guarantee that the clothing you are able to buy and wear has been made sustainability and with respect to the human rights of the people who make them.
- 4 Finally, talk to your friends and family about the social and environmental impacts of their clothes.**

 - How can you make your friends and family more aware about making responsible shopping choices? What can they learn from you, and what can you learn from them? Build a community of people who care and want to wear clothes made without harming the planet or the people who make them.

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.

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