Fashion markets in Europe and the United States: towards sustainable consumption?
Fashion is becoming more and more "sustainable"

What, in your opinion, defines a "sustainable" fashion item?
(Only 1 answer)

The protection of the environment is top priority for France and Italy. Labor conditions and materials used are number 1 for German consumers and the materials used is the first criteria for US.

France:

- The protection of the environment (How?): 41.6%
- The materials used (What?): 28.2%
- The labor conditions for manufacturing (Who?): 17.2%
- The place of manufacturing (Where?): 13.0%

Germany

- The protection of the environment: 23.8%
- The materials used: 29.0%
- The labor conditions for manufacturing: 30.3%
- The place of manufacturing: 16.8%

Italy

- The protection of the environment: 40.7%
- The materials used: 34.0%
- The labor conditions for manufacturing: 15.8%
- The place of manufacturing: 9.6%

USA

- The protection of the environment: 24.9%
- The materials used: 47.1%
- The labor conditions for manufacturing: 13.3%
- The place of manufacturing: 14.7%
How in your opinion, in order to be sustainable, a fashion item has to be made above all?
(1 to 3 answers)

“Renounce the use of toxic chemical products” is considered to be the most important criteria

France:

- By a company that does not use toxic chemical products that harm the environment: 64.1%
- By a company that does not use toxic chemical products that harm the skin: 50.3%
- Without maltreatment of animals: 40.4%
- By a company that limits its emissions of greenhouse gasses: 37.3%
- By a company that limits pollution from transport: 33.0%
- By a company that limits its water usage: 32.1%

Germany: 63.0%
Italy: 69.7%
USA: 66.1%

By a company that limits its water usage

By a company that limits its emissions of greenhouse gasses

By a company that limits pollution from transport

By a company that does not use toxic chemical products that harm the skin

Without maltreatment of animals

By a company that does not use toxic chemical products that harm the environment

“Renounce the use of toxic chemical products” is considered to be the most important criteria
What in your opinion, in order to be sustainable, a fashion item should be made from?

(1 to 3 answers)

The use of natural materials seems to be the priority for consumers, even though some natural fibers might have a negative impact on the environment.

### France:
- Natural materials (e.g. cotton, linen, hemp ...)
- Materials that respect the environment (whether natural or man-made)
- Recycled materials (from textiles/clothing that are recycled at the end of their lifespan)
- Organic materials (products without traces of synthetic pesticides and a label quality guarantee)
- Materials that are durable so they can be kept for longer

### Germany
- Natural materials (e.g. cotton, linen, hemp ...)
- Materials that respect the environment (whether natural or man-made)
- Recycled materials (from textiles/clothing that are recycled at the end of their lifespan)
- Organic materials (products without traces of synthetic pesticides and a label quality guarantee)
- Materials that are durable so they can be kept for longer

### Italy
- Natural materials (e.g. cotton, linen, hemp ...)
- Materials that respect the environment (whether natural or man-made)
- Recycled materials (from textiles/clothing that are recycled at the end of their lifespan)
- Organic materials (products without traces of synthetic pesticides and a label quality guarantee)
- Materials that are durable so they can be kept for longer

### USA
- Natural materials (e.g. cotton, linen, hemp ...)
- Materials that respect the environment (whether natural or man-made)
- Recycled materials (from textiles/clothing that are recycled at the end of their lifespan)
- Organic materials (products without traces of synthetic pesticides and a label quality guarantee)
- Materials that are durable so they can be kept for longer
By who in your opinion, in order to be sustainable, a fashion item should be made?
(1 to 3 answers)

Health and safety for workers and the opposition to child labor are the most important social criteria

France:
- By a company that is committed to respecting the health and safety of its workers: 53.4%
- By a company that does not use child labor: 50.1%
- By workers who earn a high enough salary to live on: 31.8%
- By a company that does not practice forced labor: 27.4%
- By a company that applies the law on minimum wage: 23.4%
- By a company that does not practice any form of discrimination: 15.8%

Germany: 44.9%
Italy: 61.2%
USA: 54.6%

Germany: 56.7%
Italy: 57.5%
USA: 43.0%

Germany: 35.0%
Italy: 34.6%
USA: 32.0%

Germany: 37.2%
Italy: 18.5%
USA: 39.3%

Germany: 26.2%
Italy: 23.2%
USA: 18.3%

Germany: 13.7%
Italy: 23.7%
USA: 26.9%
Where do you think a fashion item can be made to be sustainable?
(1 to 3 answers)

Local production (including Europe) is strongly associated with sustainable development compliance

France:

- In its own country: 79.6%
- In Europe: 45.8%
- In Eastern Europe (outside EU): 8.6%
- In the Mediterranean countries (Turkey, Morocco, Tunisia, etc.): 4.1%
- It could be made anywhere in the world: 7.8%

Germany:
- In its own country: 71.4%
- In Europe: 57.3%
- In Eastern Europe (outside EU): 8.7%
- In the Mediterranean countries: 4.7%
- It could be made anywhere in the world: 7.3%

Italy:
- In its own country: 64.6%
- In Europe: 55.2%
- In Eastern Europe (outside EU): 11.2%
- In the Mediterranean countries: 13.1%
- It could be made anywhere in the world: 11.7%
Where do you think a fashion item can be made to be sustainable? (1 to 3 answers)

Local production is also strongly associated with sustainable development compliance in the US.
Which of these materials have the most negative impact on the environment when they are produced?
(1 to 3 answers)

A similar perception of the pollution degree of synthetic materials

<table>
<thead>
<tr>
<th>TOP 10</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>Germany</td>
<td>Italy</td>
<td>USA</td>
</tr>
<tr>
<td>1. Polyester (51.4 %)</td>
<td>1. Polyester (56.7 %)</td>
<td>1. Polyester (57.2 %)</td>
<td>1. Acrylic (46.1 %)</td>
</tr>
<tr>
<td>2. Acrylic (40.3 %)</td>
<td>2. Acrylic (48.5 %)</td>
<td>2. Acrylic (53.3 %)</td>
<td>2. Polyester (42.0 %)</td>
</tr>
<tr>
<td>3. Polyamide (34.8 %)</td>
<td>3. Polyamide (45.9 %)</td>
<td>3. Polyamide (43.4 %)</td>
<td>3. Polyamide (36.7 %)</td>
</tr>
<tr>
<td>4. Leather (26.1 %)</td>
<td>4. Leather (25.1 %)</td>
<td>4. Leather (30.2 %)</td>
<td>4. Leather (28.0 %)</td>
</tr>
<tr>
<td>5. Viscose (22.1 %)</td>
<td>5. Viscose (17.0 %)</td>
<td>5. Viscose (22.1 %)</td>
<td>5. Viscose (15.5 %)</td>
</tr>
<tr>
<td>6. Cotton (18.5 %)</td>
<td>6. Cotton (15.1 %)</td>
<td>6. Cotton (12.0 %)</td>
<td>6. Cotton (14.6 %)</td>
</tr>
<tr>
<td>7. Cashmere (13.1 %)</td>
<td>7. Cashmere (8.1 %)</td>
<td>7. Cashmere (9.6 %)</td>
<td>7. Wool (13.4 %)</td>
</tr>
<tr>
<td>8. Silk (8.9 %)</td>
<td>8. Wool (7.7 %)</td>
<td>8. Wool (9.2 %)</td>
<td>8. Cashmere (12.8 %)</td>
</tr>
<tr>
<td>9. Hemp (8.8 %)</td>
<td>9. Silk (7.7 %)</td>
<td>9. Linen (8.7 %)</td>
<td>9. Silk (12.7 %)</td>
</tr>
<tr>
<td>10. Linen (8.4 %)</td>
<td>10. Linen (6.2 %)</td>
<td>10. Hemp (7.6 %)</td>
<td>10. Hemp (9.2 %)</td>
</tr>
</tbody>
</table>
Did you buy at least one sustainable fashion item for yourself in 2019?
(For example: recycled textile and/or organic materials and/or "made in" and/or second-hand items...)
- Yes

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2019 Average annual budget for those who bought sustainable fashion items:

<table>
<thead>
<tr>
<th>Item</th>
<th>In €</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clothing</td>
<td>136</td>
<td>144</td>
<td>166</td>
<td>166</td>
<td>166</td>
</tr>
<tr>
<td>Underwear, lingerie</td>
<td>104</td>
<td>95</td>
<td>110</td>
<td></td>
<td>123</td>
</tr>
<tr>
<td>Shoes</td>
<td>134</td>
<td>169</td>
<td>180</td>
<td></td>
<td>191</td>
</tr>
<tr>
<td>Leather goods</td>
<td>172</td>
<td>183</td>
<td>212</td>
<td></td>
<td>191</td>
</tr>
</tbody>
</table>
Did you buy organic food, organic beauty or sustainable fashion in 2019?

An important potential of growth for sustainable fashion

Sustainable fashion: recycled textile and/or organic materials and/or "made in" and/or second-hand items…
Did you buy any second-hand clothing in 2019?
- Yes

The second-hand market is most important in France and the United States.
Do you know any fashion brands that sell sustainable items (even if you didn't buy anything)?

- Yes

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>22.8%</td>
</tr>
<tr>
<td>Germany</td>
<td>26.9%</td>
</tr>
<tr>
<td>Italy</td>
<td>30.0%</td>
</tr>
<tr>
<td>United States</td>
<td>30.8%</td>
</tr>
</tbody>
</table>
Do you feel you have enough information about sustainable fashion?
Why didn't you buy any sustainable fashion items?
(1 to 2 answers)

France:

<table>
<thead>
<tr>
<th>Reason</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't know enough about the subject</td>
<td>50.4%</td>
<td>42.9%</td>
<td>43.6%</td>
<td>61.0%</td>
</tr>
<tr>
<td>I don't know where to find these products</td>
<td>39.8%</td>
<td>37.3%</td>
<td>59.0%</td>
<td>45.3%</td>
</tr>
<tr>
<td>The products are too expensive</td>
<td>33.4%</td>
<td>38.9%</td>
<td>25.5%</td>
<td>25.4%</td>
</tr>
<tr>
<td>I don't like the style of these products</td>
<td>7.5%</td>
<td>19.0%</td>
<td>9.4%</td>
<td>8.0%</td>
</tr>
<tr>
<td>I bought these in the past (in 2018 or before) but I don't make this type of purchase any more.</td>
<td>5.1%</td>
<td>5.8%</td>
<td>7.9%</td>
<td>9.9%</td>
</tr>
</tbody>
</table>