

CHAIR

institut
FRANÇAIS
de la MÔDE

PREMIÈRE**VISION**

Fashion markets in Europe and the
United States: towards sustainable
consumption?

Fashion is becoming more and more "sustainable"

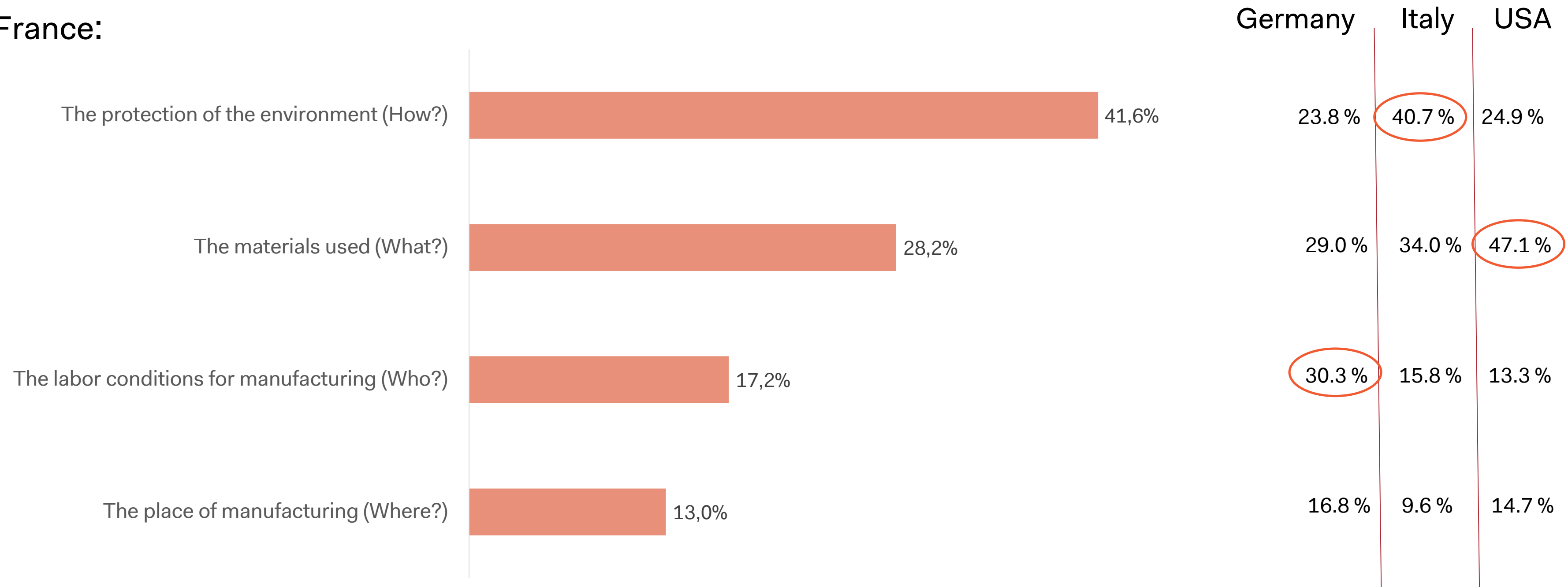
What, in your opinion, defines a "sustainable" fashion item?

(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:

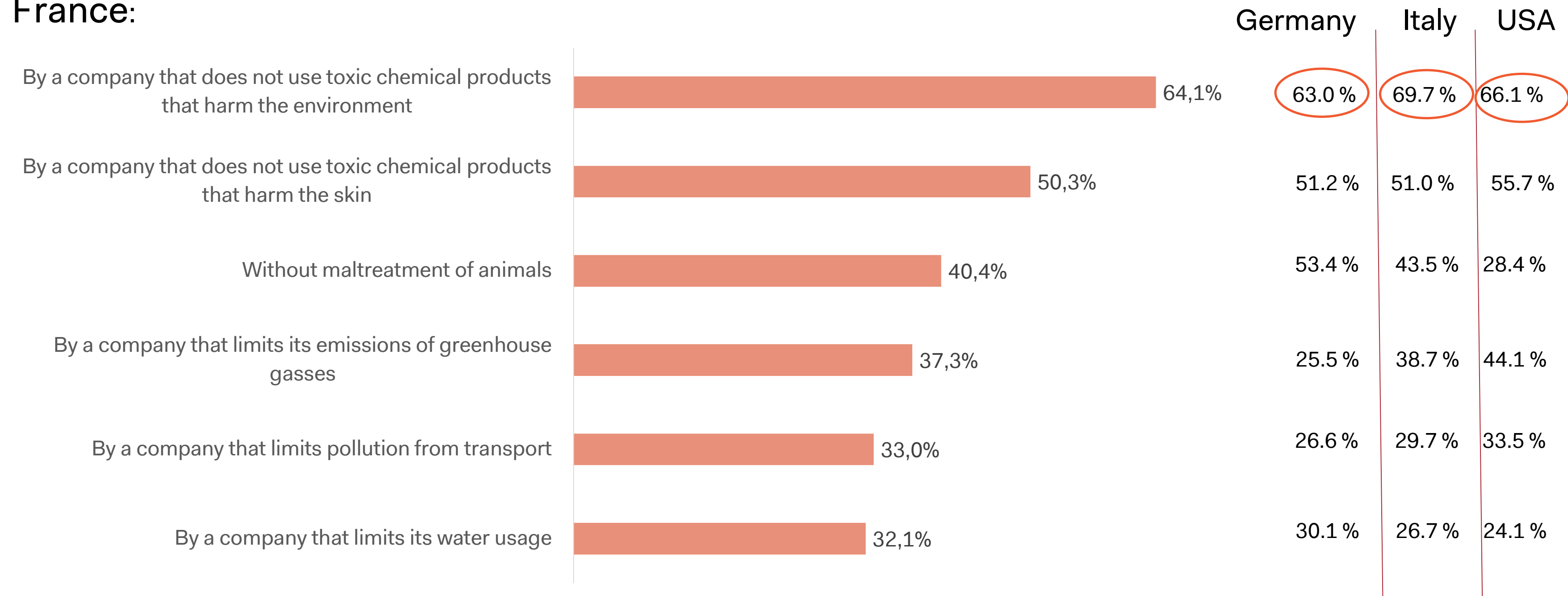


How in your opinion, in order to be sustainable, a fashion item has to be made above all?

(1 to 3 answers)

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

France:

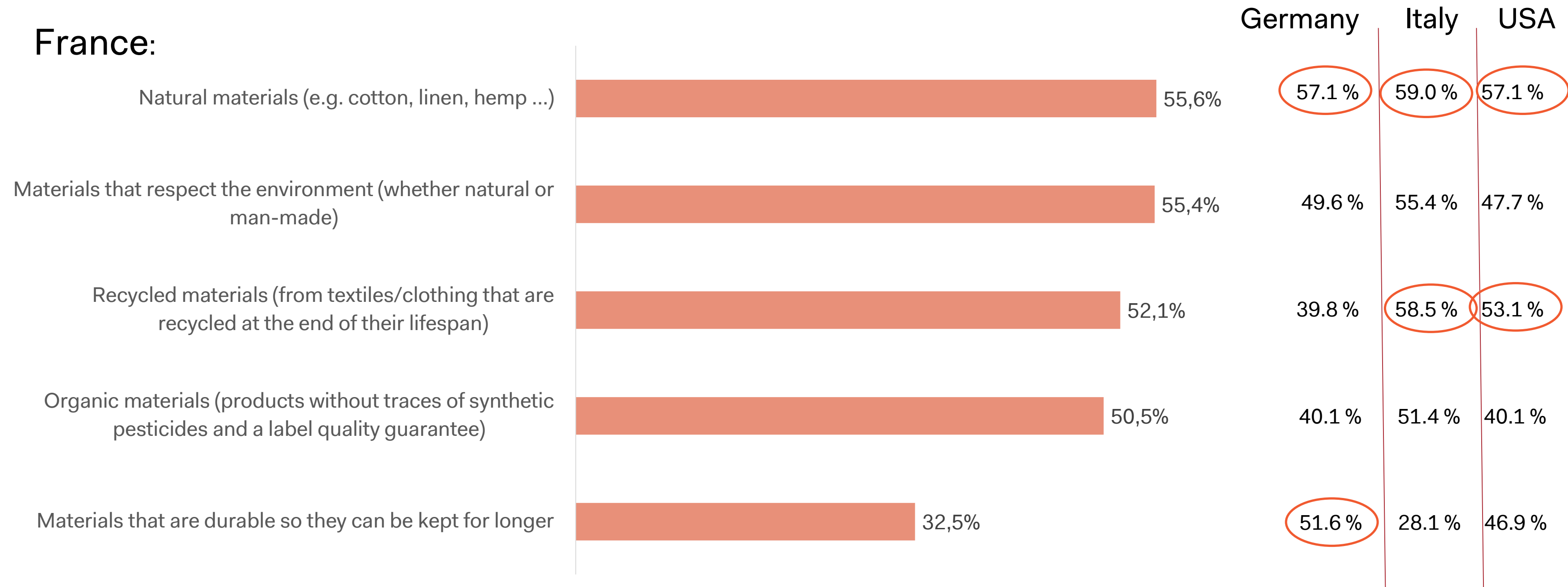


What in your opinion, in order to be sustainable, a fashion item should be made from?

(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:



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

Italy

USA

44.9 %

61.2 %

54.6 %

56.7 %

57.5 %

43.0 %

35.0 %

34.6 %

32.0 %

37.2 %

18.5 %

39.3 %

26.2 %

23.2 %

18.3 %

13.7 %

23.7 %

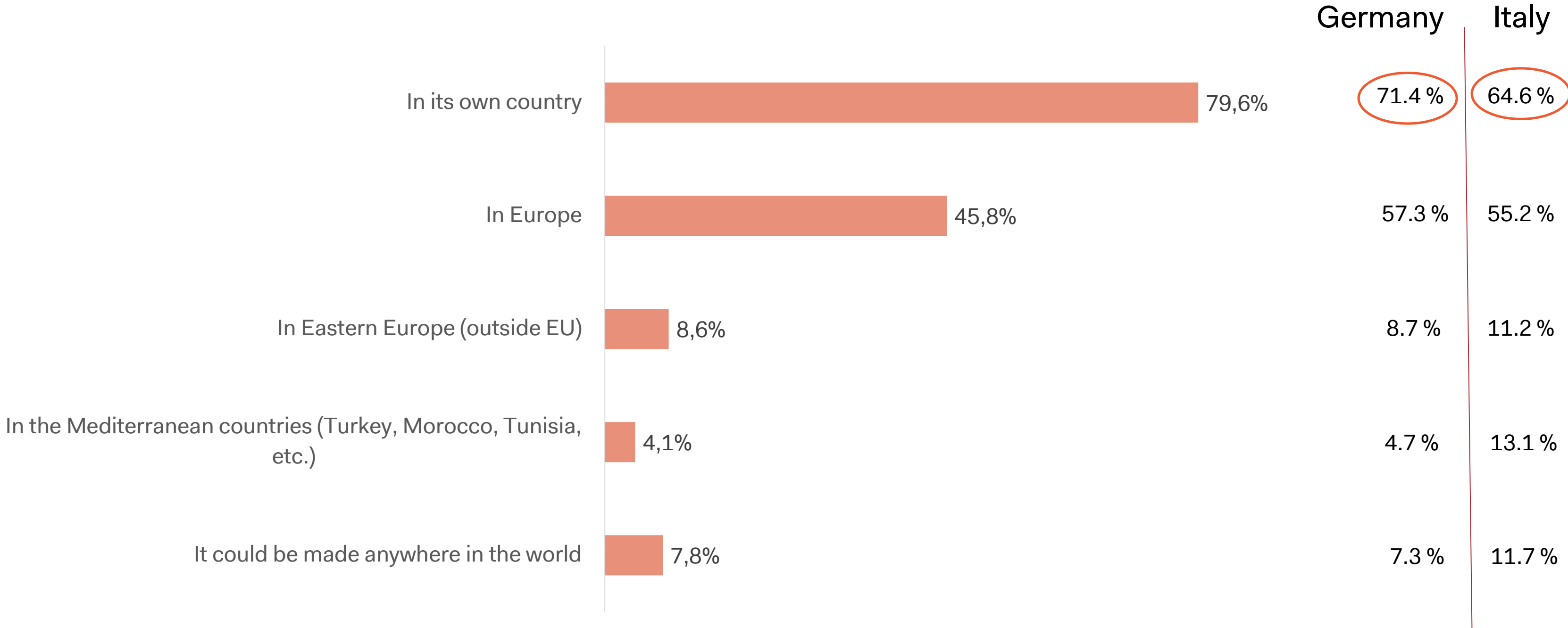
26.9 %

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

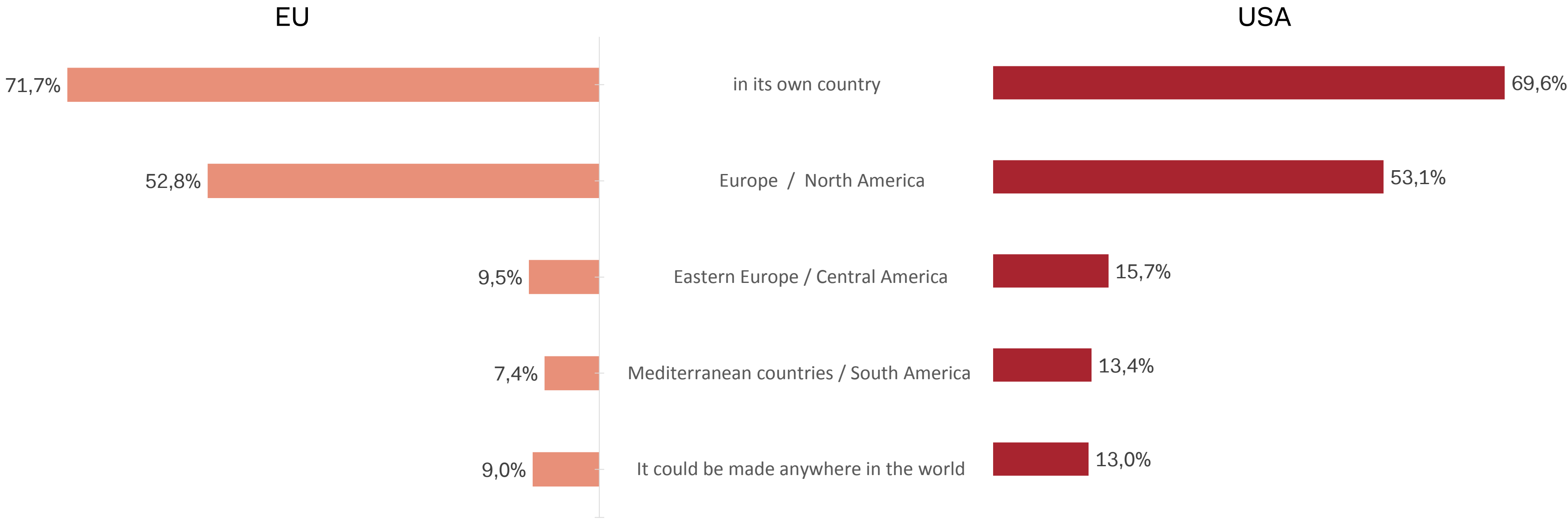
France:



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

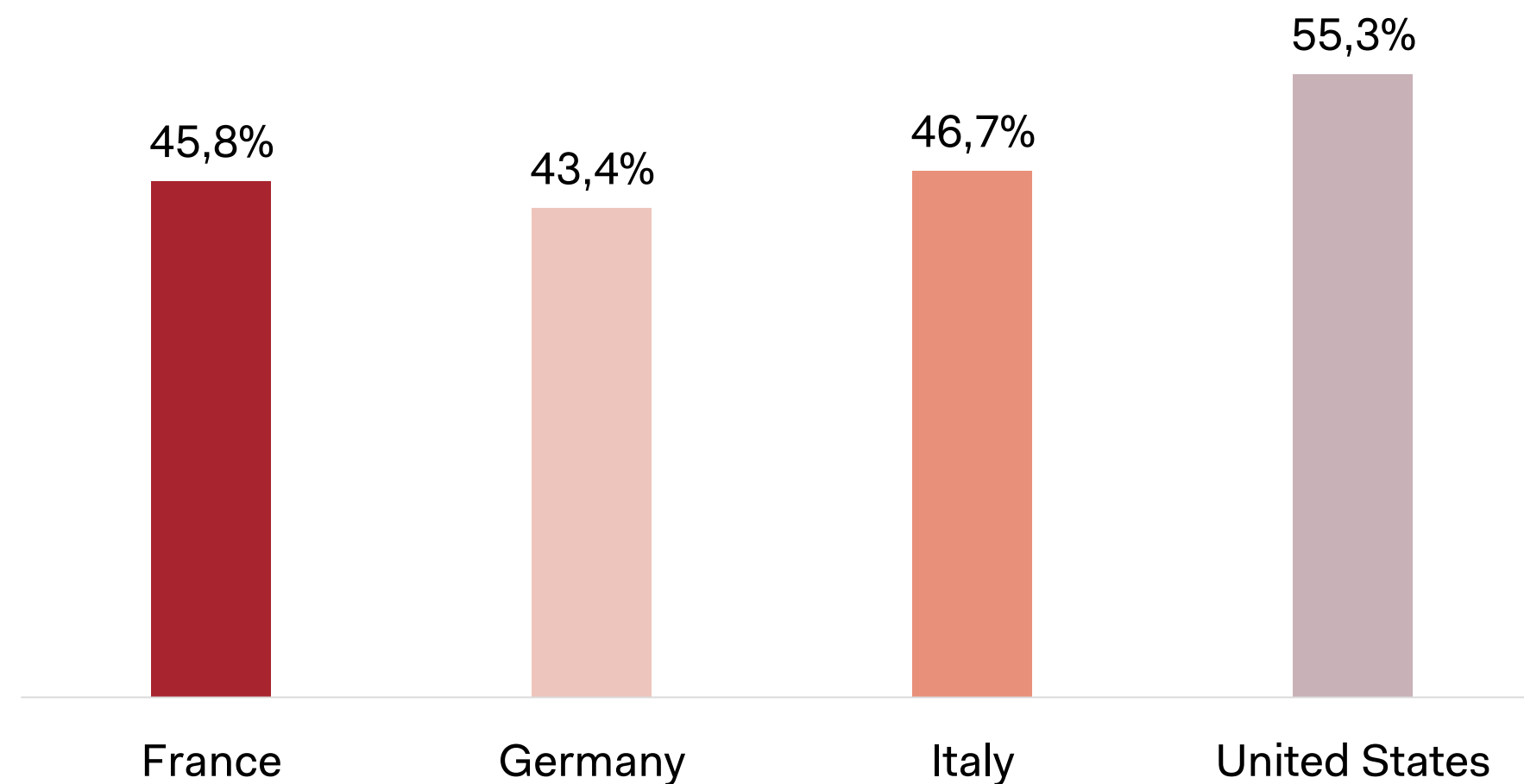
TOP 10

France	Germany	Italy	USA
1. Polyester (51.4 %)	1. Polyester (56.7 %)	1. Polyester (57.2 %)	1. Acrylic (46.1 %)
2. Acrylic (40.3 %)	2. Acrylic (48.5 %)	2. Acrylic (53.3 %)	2. Polyester (42.0 %)
3. Polyamide (34.8 %)	3. Polyamide (45.9 %)	3. Polyamide (43.4 %)	3. Polyamide (36.7 %)
4. Leather (26.1 %)	4. Leather (25.1 %)	4. Leather (30.2 %)	4. Leather (28.0 %)
5. Viscose (22.1 %)	5. Viscose (17.0 %)	5. Viscose (22.1 %)	5. Viscose (15.5 %)
6. Cotton (18.5 %)	6. Cotton (15.1 %)	6. Cotton (12.0 %)	6. Cotton (14.6 %)
7. Cashmere (13.1 %)	7. Cashmere (8.1 %)	7. Cashmere (9.6 %)	7. Wool (13.4 %)
8. Silk (8.9 %)	8. Wool (7.7 %)	8. Wool (9.2 %)	8. Cashmere (12.8 %)
9. Hemp (8.8 %)	9. Silk (7.7 %)	9. Linen (8.7 %)	9. Silk (12.7 %)
10. Linen (8.4 %)	10. Linen (6.2 %)	10. Hemp (7.6 %)	10. Hemp (9.2 %)

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

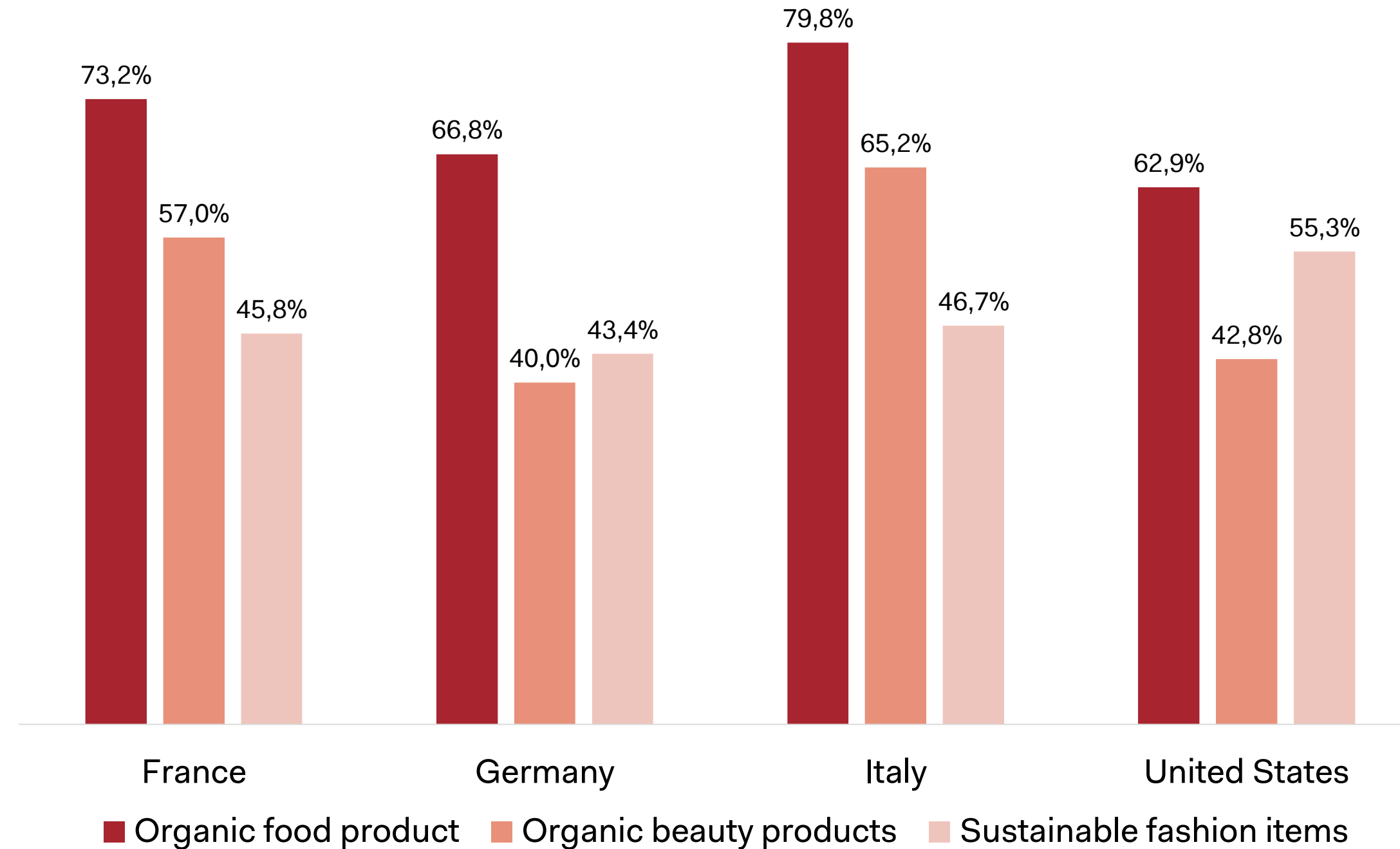


2019 Average annual budget for those who bought sustainable fashion items :

In €	France	Germany	Italy	United States
Clothing	136	144	166	166
Underwear, lingerie	104	95	110	123
Shoes	134	169	180	191
Leather goods	172	183	212	191

Did you buy organic food, organic beauty or sustainable fashion in 2019?

An important potential of growth for sustainable fashion

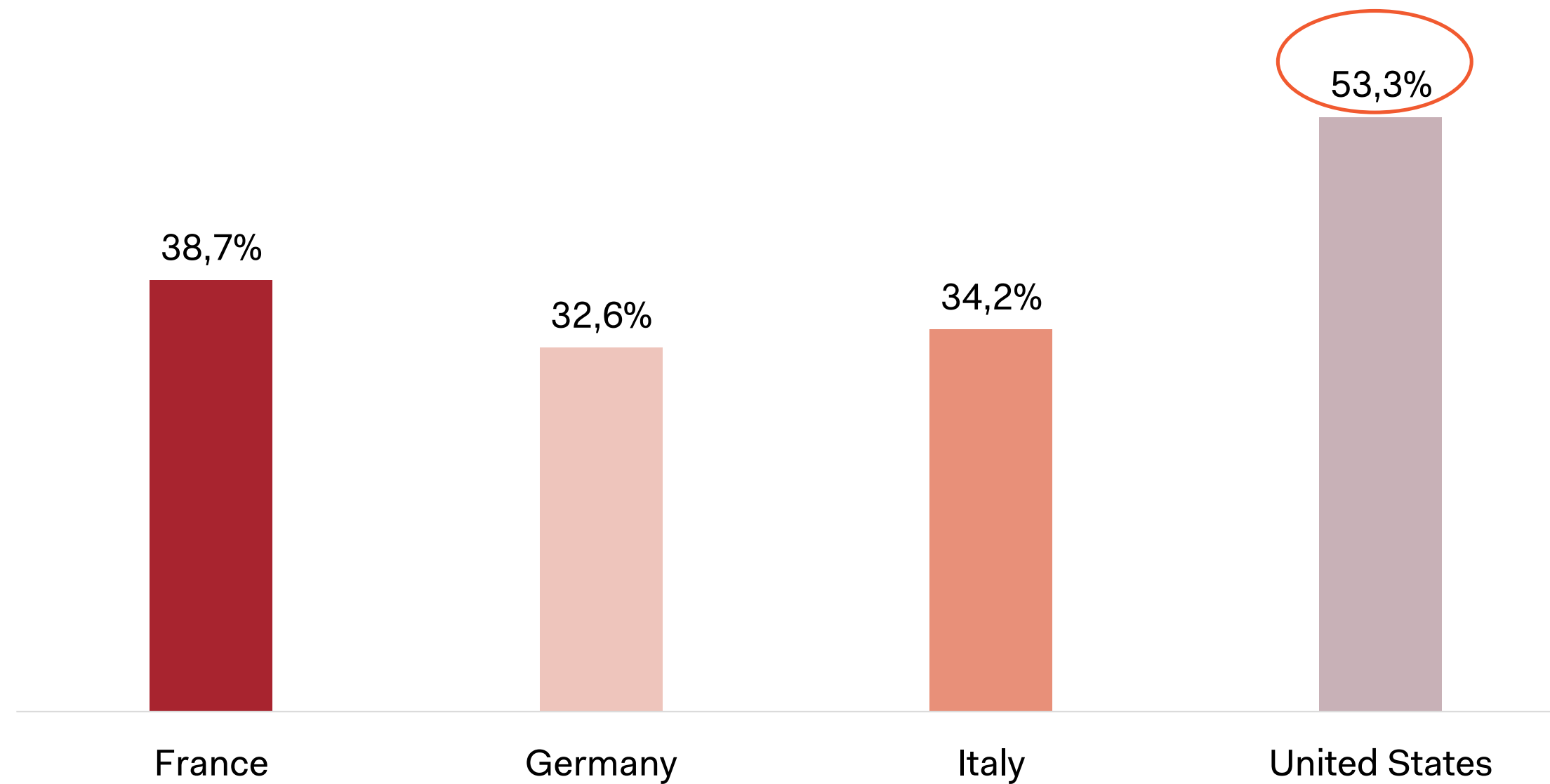


Sustainable fashion: recycled textile and/or organic materials and/or "made in" and/or second-hand items...

Did you buy any second-hand clothing in 2019?

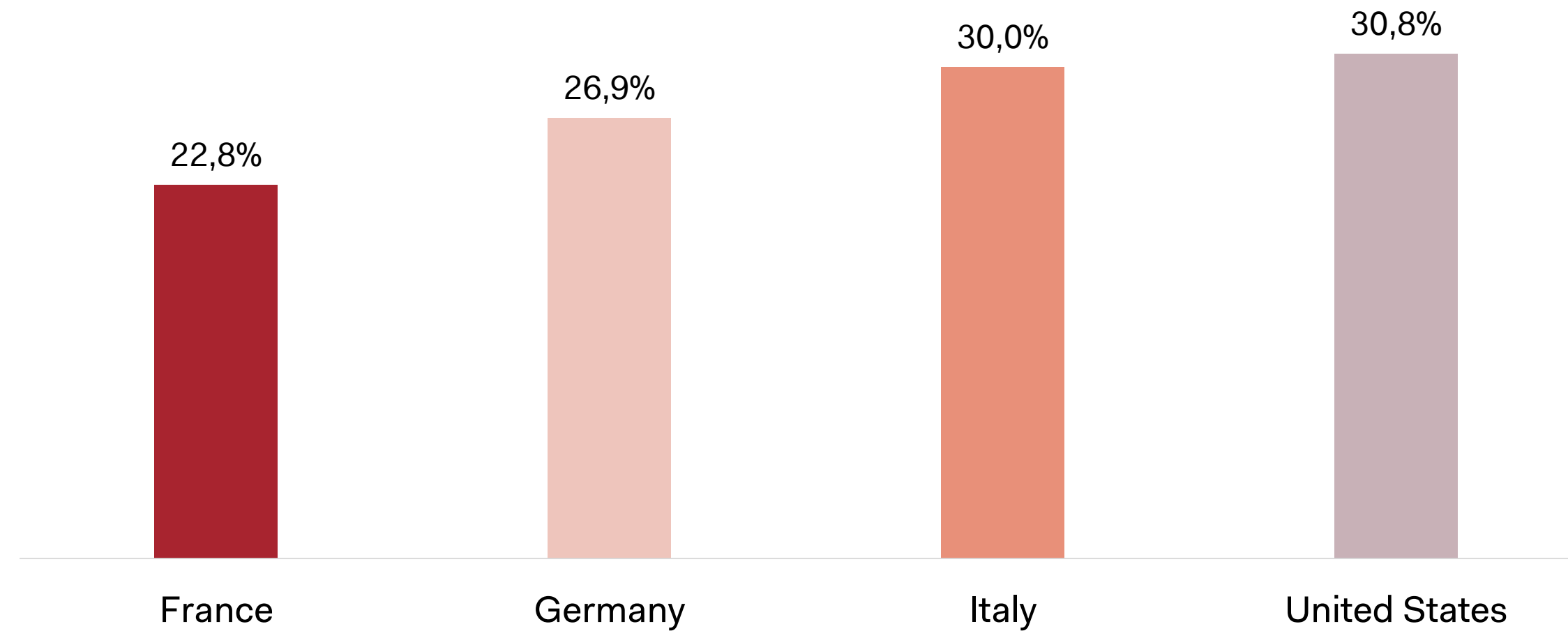
- Yes

The second-hand market is most important in France and the United States

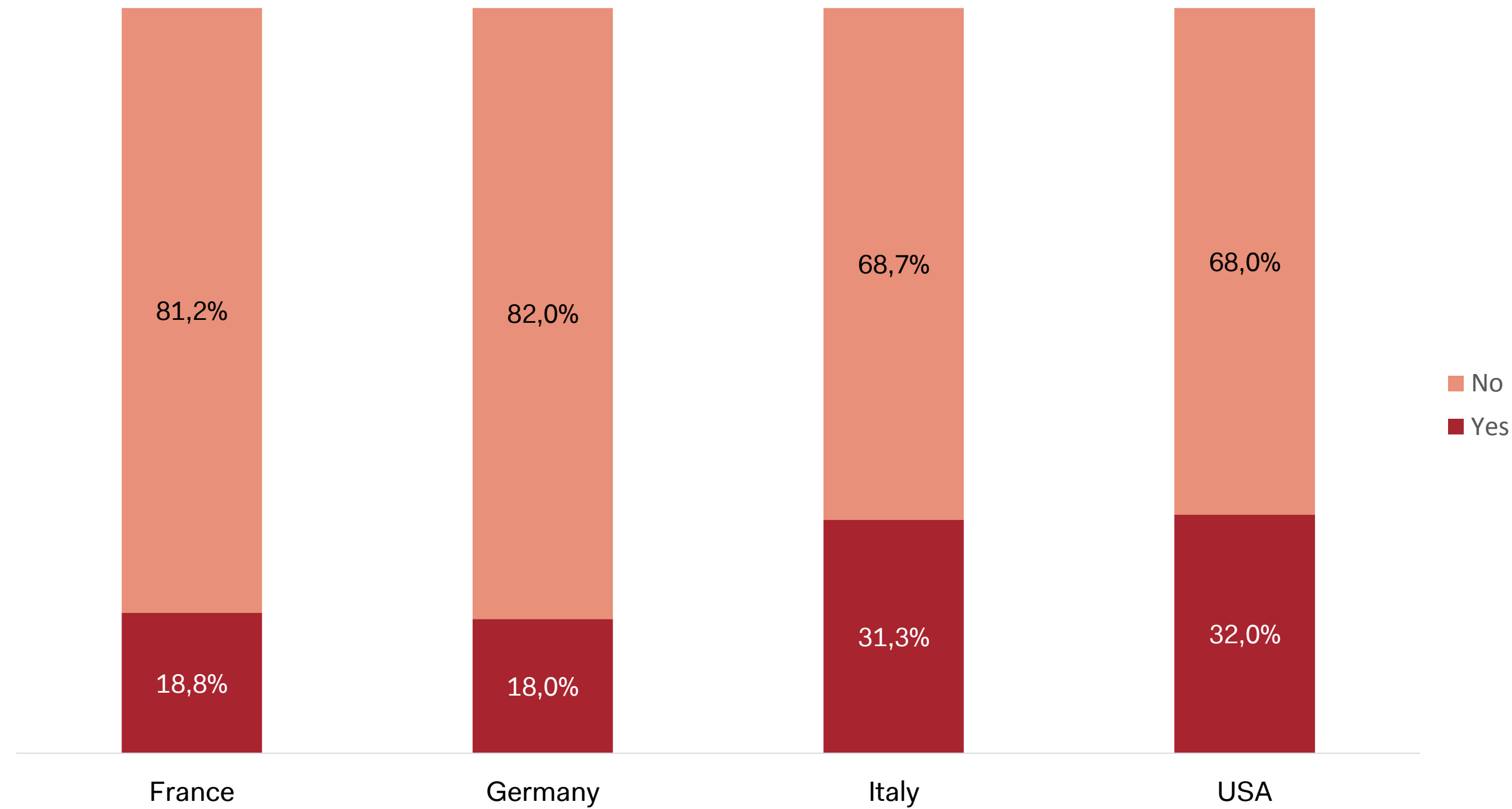


Do you know any fashion brands that sell sustainable items (even if you didn't buy anything)?

- Yes



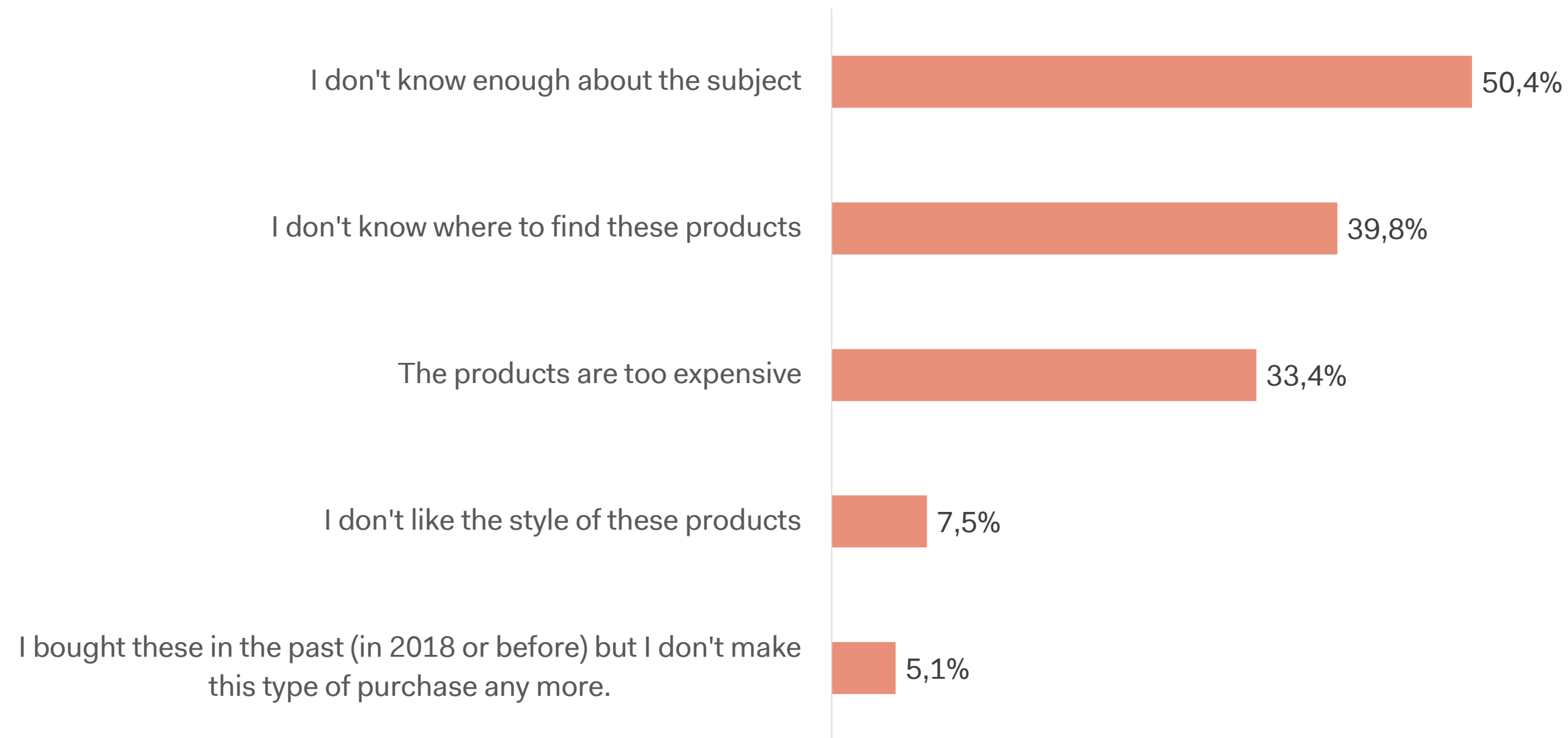
Do you feel you have enough information about sustainable fashion?



Why didn't you buy any sustainable fashion items?

(1 to 2 answers)

France :



	Germany	Italy	USA
I don't know enough about the subject	42.9 %	43.6 %	61.0 %
I don't know where to find these products	37.3 %	59.0 %	45.3 %
The products are too expensive	38.9 %	25.5 %	25.4 %
I don't like the style of these products	19.0 %	9.4 %	8.0 %
I bought these in the past (in 2018 or before) but I don't make this type of purchase any more.	5.8 %	7.9 %	9.9 %