



Press Release

Sustainability megatrend – German consumers’ expectations of the fashion industry

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Eva Böhm
Public Relations
T +49 911 395 4440
public.relations@gfk.com

Nuremberg, Germany, April 20, 2022 – Consumer awareness of sustainability is growing steadily. This also has a huge impact on the fashion industry. 69 percent of German consumers say that environmental and social compatibility are very or fairly important to them when purchasing clothing and footwear. Brands and manufacturers are responding accordingly to this increasing demand. Thus, eco-labels in the fashion industry and offers of used clothing, also among major retailers, are recording significant growth. These are GfK’s findings ahead of the Earth Day on April 22, 2022, with the German motto “Your clothes make the man – Sustainable, Organic & Fair suits you and the Earth better.”

Sustainability has gained enormously in importance among German consumers in recent years, not the least driven by the pandemic. The group of Glamour Greens in particular, a consumer group that consciously displays its ecological actions to the outside world, has grown significantly over the past ten years. A qualitative GfK survey of consumers confirms that sustainability has become an expression of a lifestyle and that conscious consumption has become a status symbol rather than renunciation.

Sustainability in the fashion industry

From the consumer’s perspective, “green fashion” is about topics such as manufacturing conditions, materials, slow fashion and recycling. “When it comes to sustainable clothing, German consumers attach importance to fair pay and decent working conditions during production, as well as ecological materials, such as those from organic cultivation. But slow fashion and recycling also play a central role,” **says Petra Dilleuth, GfK expert in the fashion sector.** “For one-third of consumers, the responsibility for complying with these aspects and therefore overall for the issue of sustainability in the fashion industry lies with the companies. Establishing themselves in this area accordingly holds immense potential for retailers and manufacturers to make their mark.”

GfK SE
Sophie-Germain-Strasse 3 – 5
90443 Nuremberg
Germany

T +49 911 395 0

Executive Board:
Lars Nordmark (Interim CEO)
Joshua Hubbert

Chair of the Supervisory Board:
Thomas Ebeling

Commercial Register:
Nuremberg CRB 25014

Growing market for used clothing

On average, 43 percent of Germans throw away damaged clothing instead of repairing or reusing it. Higher-quality processing by manufacturers could extend the service life of textiles and thus also increase consumers' appreciation of the products. In addition to recycling fabrics, second-hand clothes and reselling used clothing is also an important aspect of consumers' sustainability approach. Whereas in 2017, 25 percent of respondents said they would resell clothing in good condition; by 2021, that figure had risen to 44 percent.

Such steady growth rates represent opportunities for both retailers and manufacturers. In addition to classic second-hand stores, the market has therefore not only seen the emergence of numerous new online platforms in recent years, but even established players have launched "pre-owned" sections on their websites. This new, hybrid business model of offering both new and used items in the same store opens up additional opportunities for retailers and access to a new customer group. To provide companies with corresponding insights into the purchasing behavior of consumers, the GfK Fashion Panel in Germany has therefore also been tracking used clothing since 2021. It shows that it is primarily product groups with a high purchase price that are acquired second-hand. In the case of coats, for example, the percentage bought used is 6 percent. Above-average demand for second-hand clothing comes from the Millennials age group (25 to 39 years).

Eco-labels are gaining in importance

When looking for fairly produced clothing, consumers are primarily guided by eco-labels such as *Confidence in Textiles* or *GOTS* (Global Organic Textile Standard): 65 percent of Germans confirm that they trust these labels. On average, every second consumer specifically looks for such eco-labels when making a purchase. However, the actual percentages vary widely among the different types of buyers, depending on their sustainability values. Among consumers who consistently pursue a green lifestyle across all areas of life, 84 percent look for seals on clothing. By contrast, the proportion of consumers who do only the minimum for environmental and social responsibility is only 9 percent. Eco-labels are particularly relevant to the Glamour Greens group, as they are considered an important indicator to declare environmentally and socially conscious purchases to the outside world. Overall, both qualitative and quantitative studies by the GfK Fashion Panel confirm in the long term that eco-labels are playing an increasingly central role in the fashion industry due to rising demand. Accordingly, the number of eco-label buyers already increased by 40 percent from 2012 to 2021.

This is not a short-term trend, but a long-term change.

Consumer awareness of sustainability is here to stay. Various aspects have already recorded continuous growth over a longer period of observation, which will continue in the future. Clothing based on materials of animal origin can be highlighted as an example. These are becoming less and



less attractive to consumers. For example, whereas in 2015, 58 percent of consumers still said they would not buy clothing with fur features; by 2021, that figure had risen to 81 percent. “For consumers, key sustainability aspects in the clothing sector are in some cases even more important than in other non-food areas. Due to the lower complexity of the products, they seem easier to implement than for smartphones or refrigerators, for example. Retailers and manufacturers must meet these consumer expectations to establish themselves as “green fashion” in the long term. This is the only way they can reach the group of buyers who are also willing to spend more money on sustainable clothing,” **adds Petra Dillemoth.**

About the Study

The GfK Consumer Panel Fashion in Germany records all clothing and footwear purchases made by around 14,500 people from approximately 7,000 households. The GfK Consumer Panel thus provides a continuous and representative picture of the fashion purchasing behavior of private households in Germany.

Media contact: Eva Böhm, T +49 911 395 4440, public.relations@gfk.com

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