

IFM study conducted in partnership  
with Première Vision - July 2022

PREMIÈREVISION

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FRANÇAIS  
de la  
MODE

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## **ECOLOGICALLY RESPONSIBLE FASHION:** WHAT WE (REALLY) THINK ABOUT IT


**90,5 %** of respondents intend to change the way they buy clothes  
in the near future.

## A MARKET THAT CANNOT BE IGNORED

**2** OUT OF **3** EUROPEANS

say they have bought at least one eco-responsible fashion item in the past year:

 **78,4%** of Italians  
*(vs. 45% in 2019)*

 **65,4%** of the French  
*(vs. 45,3% in 2019)*


 **65,3%** of Germans  
*(vs. 43,4% in 2019)*


 **56,9%** of British


 **58%** of Americans




**Eco-responsible fashion products are an important part of the clothing budget:**

 **45%** of Italian budget

 **33%** of French budget

 **30%** of German budget

 **21%** of American budget

## PRICE, COMFORT, AND QUALITY: THE WINNING TRIFECTA



**Podium of criteria for choosing a garment in 2022**



**PRICE**



**QUALITY**


*for Europeans*



**COMFORT**

*for Americans*





Style is no longer a consideration linked to the ecological dimension: only **12%** of French people  believe that it could be a brake to buy eco-responsible clothing.


## MATERIALS AND “MADE IN”: TWO PILLARS OF ECO-RESPONSIBILITY



**The material is seen as the main lever for more responsible fashion** in Germany, the UK and Italy

 **38,6%** of Italians

 **31,5%** of Germans

 **30,1%** of British



**Made in**, i.e. local production, also takes precedence in the choice of an eco-responsible item for **33.4% of the French**  and **42.6% of Americans** .



### The three drivers of *made in*:



**The impact on the environment**



**The feeling of guarantee**




**The lever of industrial and artisanal sovereignty**



**The social responsibility of production** is also an important criterion, cited by **12 to 18%** of respondents.



### WHERE DO WE BUY OUR CLOTHES?


However, the populations of the five countries  surveyed rank the well-known textile multinationals in the top five eco-responsible brands: sports equipment manufacturers, fast fashion chains.


## EDUCATION ABOUT MATERIALS



### The brakes on buying sustainable fashion items

#### Lack of information

 **65,4%** of the French

 **49%** of Americans



#### Not knowing where to find products

**1** in **3** customers

**9 out of 10 people** intend to change the way they buy clothes and those who do not yet do so are waiting to learn more about the subject.

## KNOWLEDGE VERSUS PERCEPTION : THE CASE OF LEATHER




Leather is one of the five materials pointed out for its impact on the environment.

**27 %** of the French , **35 %** of British  and **more than 40%** of Italians ) even though it is the first recycled material to be produced from waste from the food industry.

Leather still has a prominent place in the wardrobe with over **50 % of Italian women**  and **58,5% of American men**  having purchased at least one item in the last 12 months.

**However, the image it conveys betrays the relative knowledge of production methods:**

→ **28%** of people refusing to buy leather are motivated by animal suffering (**35% in Italy** ).

→ **23,1%** refuse to buy any product of animal origin.

Yet only **1 in 2 people** know that leather comes from animals intended for meat consumption.

**This type of material also exposes cultural differences:**

→ In the United States , the country of breeding and leather reign supreme, and in Germany , **more than 70%** of those questioned believe that **leather** can be considered as an **eco-responsible material**.

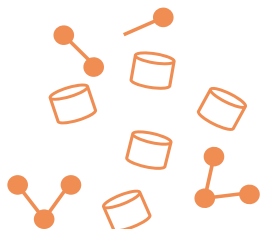
→ There is also a **10 points** gap between women, who are more sceptical about the possible eco-responsibility of leather, and men.



## Beyond materials: Cultures

Permanent power struggle between knowledge and perception:

**Polyester, acrylic and polyamide** come out on top as environmentally harmful materials



**Cotton, wool, linen and silk** are highly appreciated by respondents



## Innovation storytelling

New organic, recycled or plant-based materials are very little known to the general public.

- Only **5,2% of the French** 🇫🇷 and **3,7% of the Germans** 🇩🇪 know about materials derived from agricultural waste.
- Biopolymers (textiles synthesised from renewable resources) are known by only **1,8% of the French** 🇫🇷, **1,5% of Germans** 🇩🇪, **3% of Italians** 🇮🇹 and **Americans** 🇺🇸 and **2,1% of British** 🇬🇧.



In a world where **3 out of 4 people** say they want to «buy less but better», the advisory role of professionals will be decisive in continuing the adventure.

Study carried out by the IFM in partnership with Première Vision in April 2022.  
Sample of 7,000 people in 5 countries (France, United Kingdom, Italy, Germany and United States).

### MEDIA CONTACTS

#### PREMIÈREVISION

**Claudie Le Souder**  
Directrice Marketing Communication  
M. +33 (0)6 85 80 67 33  
c.lesouder@premierevision.com

**Igor Robinet-Slansky**  
Responsable Presse  
T. +33(0)1 70 38 70 30  
M. +33(0)6 42 06 31 02  
i.robinet@premierevision.com

#### 2<sup>e</sup> BUREAU

T. +33(0)1 42 33 93 18

**Sylvie Grumbach**  
sylvie.grumbach@2e-bureau.com

**Marie-Laure Girardon**  
M. +33(0)6 82 40 73 27  
m.girardon@2e-bureau.com

#### MONET+ASSOCIÉS

T. +33(0)4 78 37 34 64

**Véronique Bourgeois**  
M. +33 (0)6 64 22 55 56  
vb@monet-rp.com

**Justine Dupuis**  
M. +33 (0)6 98 98 95 80  
jd@monet-rp.com