Ethical Fashion Consumer Monitor

Consumer Profiles (Mini Report)

Our market research surveys provide big data for small budgets. Dedicated to investing in sustainable brands we are committed to providing actionable insights for the ethical apparel industry through our syndicated surveys.

Noreena Hertz once said…

"Transparency, accountability and sustainability have become the slogans of the market leaders. Companies carry out environmental and social audits to court the consumer, and even the bluest chips woo organisations such as Greenpeace and Amnesty."

- The consumer survey
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- Attitudes driving engagement

Introduction

The findings in this report are based on an online survey run by the Ethicologist, interviewing 2000 people about their fashion buying habits. The sample is nationally representative of the UK population, based on Gender, age, region and social grade.

This mini report is a brief look into some of the findings. The full reports or more detailed analysis are available on request.

Objectives of the research

The main objective of the survey is to measure levels of engagement with ethical apparel amongst UK consumers and provide an insight into the growth potential of this industry. The findings answer questions like: To what extent are consumers aware of issues that affect sustainability within the apparel industry and how does this effect their fashion buying? What level of awareness is there of brands that claim to be ethical and to what extent do people engage with these ethical brands? Is there a market for ethical apparel/fashion in the UK and if so how can producers reach it?

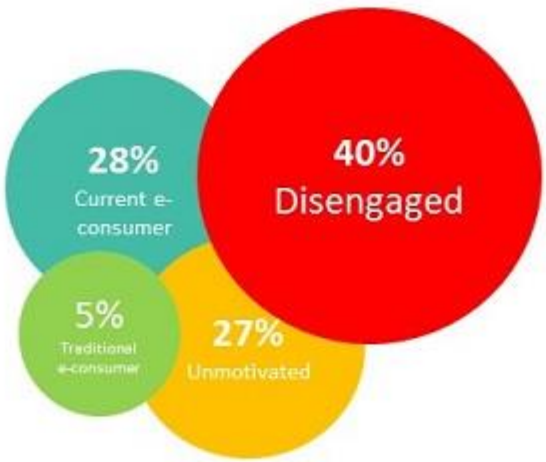
Survey outline

The respondents were shown some 50 brands that claim to be ethical in some way to gauge levels of awareness and were then asked about their engagement with these brands. They were also asked about other ways they might try and be sustainable and their attitude towards issues of sustainability. The results of the survey enable us to identify 4 specific consumer segments, allowing apparel suppliers to apply more targeted marketing efforts to meet these specific needs.

What the consumer want

On the whole the majority of UK consumers are looking for ethical brands that provide everyday affordable clothes. They are also looking for more information on products, clarity and transparency on the efforts companies make to be more sustainable. However, looking more closely at the 4 specific consumer segments, suppliers can use this data to retain the committed ethical consumers, develop a stronger bond with the less engaged and perhaps even influence the currently disengaged.

Consumer profiles



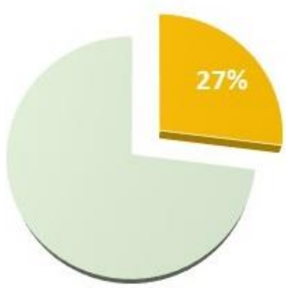
The Disengaged

Not aware of the ethical brands shown and have not bought from any other ethical labels.

Significantly more males are present in this segment than any of the other segments.

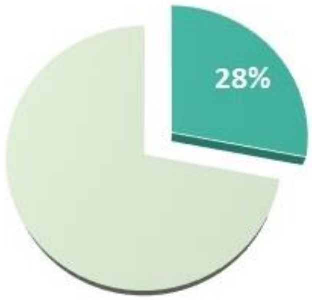
They are also most likely to have the smaller budget, spending less than £100 per month on clothes, shoes and accessories.

Slightly lower percentage are in full time employment than on average and marginally more in full time education and not working and not looking for work i.e. housewives/husbands, Carer etc. Almost 3rd of the segment fall into social grade DE. They do not do any research on ethical fashion but 25% have bought fair trade food and 16% have bought organic foods in the last 12 months.



Aware but unmotivated

Are aware of some of the brands shown but have not bought from any or from other brands that claim to be ethical in anyway. 75% spend less than £100 per month on clothes/accessories and shoes which is significantly less than the disengaged group. A higher proportion than the disengaged also spend between £100 and £199 per month. When replacing items of clothing the unmotivated group have a slightly larger budget and a significantly higher proportion in this group buy spontaneously compared to the disengaged. Though this group is unmotivated to engage with sustainable apparel they are much more active in other sustainable practices than the disengaged for example 36% have bought fair trade foods and 28% organic foods in the last 12 months, higher percentage also donate old clothes, shop at charity shops and repair old clothes.



Current ethical consumer

Aware and have bought from ethical brands. A significant proportion of the UK population are current ethical consumers. They display the highest levels of awareness of the ethical brands shown in the survey and 46% have taken some kind of action as result of discovering unethical practices amongst apparel suppliers. They generally have a bigger monthly budget for apparel and also spend more on replacing items as well as spontaneous and planned buying. The current ethical consumer is the most active across the board on other sustainable practices measured in this survey with 58% having ever bought fair trade foods and 51% ever bought organic foods. This consumer group tend to be more online savvy, do their own research into products including ethical products and seem to have bought from the ethical brands listed on this survey without realizing they are ethical.

Traditional ethical consumer

Not aware of brands shown but engage with ethical suppliers. Though a small group they throw some light into how older age groups concerned about unethical practices behave. This group are not aware of the ethical brands shown in this survey but have bought other brands claiming to be ethical in some way. Almost a 3rd of this group are over the age of 65 and despite a small monthly budget for clothes buying, 18% most frequently buy their clothes at M&S, whilst 45% have bought fair trade foods and 20% organic foods in the last 12 months.

The growing potential for a sustainable clothing brand

Further analysis of these consumer segments help understand not only the growth potential for the ethical apparel market but also the changing attitudes and expectations among consumer segments and how they drive engagement with brands and products.

Interestingly all of the segments, including the disengaged (in ethical apparel) buy fair trade and organic foods. They also participate in other sustainable practices like donating clothes, shopping in charity/ 2nd hand shops and even support campaigns. The main difference between these segments is not so much a gap in income as perhaps a gap in knowledge, information and access to reliable sources of information.

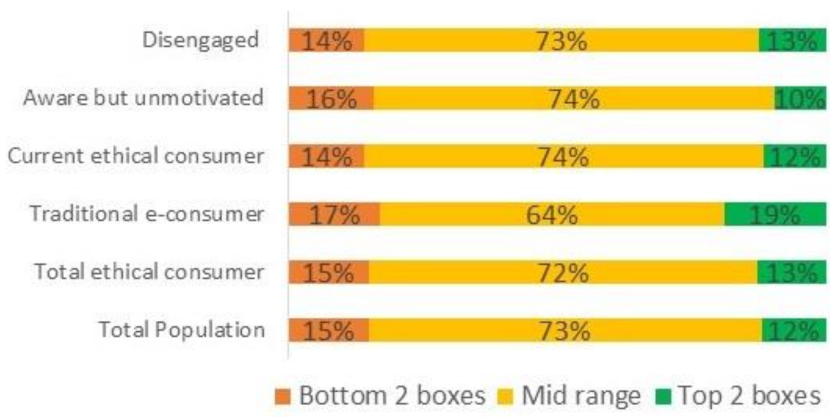
Though attitudes and opinions vary regarding the extent of personal responsibility to be taken for ethical shopping, there is a general understanding that sustainability is an issue that needs to be addressed and an openness to participate is evident.

<u>Some underlying attitudes effecting levels of engagement</u>

A number of statements were shown to the respondents to try and understand some of the underlying attitudes and opinions that might differentiate these segments from each other. They were asked to state to what extent they agree or disagree with each statement on a scale of 1 to 10, where 1 was completely disagree and 10 was completely agree. The findings provide some useful insights, identifying the potential market for ethical fashion in each of the segments and allowing for a more targeted marketing strategy.

Statement 1

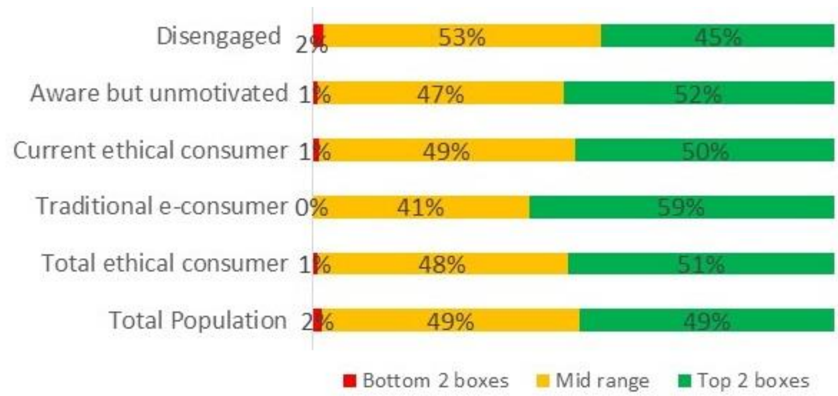
It is very difficult if not impossible for fashion companies to guarantee that there are no human rights abuses being committed in their supply chains



The underlying attitude across the board is that companies can take responsibility and should. As almost all segments are slightly more likely to disagree with this statement than agree with it though the majority take the middle ground. The only exception being the slightly older age group of consumers, (Traditional e-consumers) possibly due to less familiarity with business issues. Suppliers already going to great lengths in ensuring that human rights are upheld in their supply chain can only stand to gain vocalizing this.

Statement 2

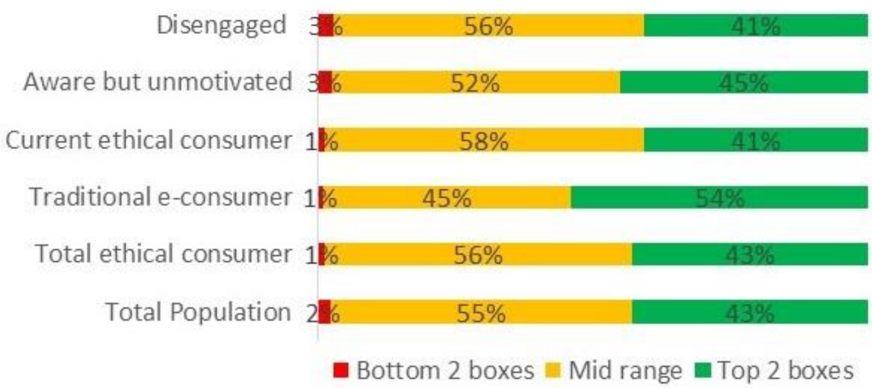
It is the responsibility of any business to ensure that there is no human rights abuses committed in their supply chain



The general understanding amongst consumers is that this is in fact a taken. The majority within almost all segments, hold the view, that responsibility lies with the business. Though the disengaged differ slightly, even appealing to the 45% of this consumer segment by highlighting measures taken as a business to eliminate human rights abuses such as using fair trade suppliers, ethical fashion labels stand to gain a substantial growth in customers. Bearing in mind the disengaged segment is the largest consumer group identified in this study accounting for 40% of the UK population.

Statement 3

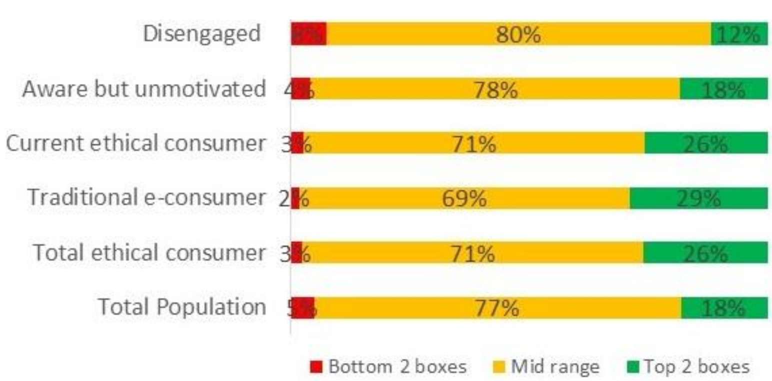
Companies that are involved in human rights abuses in any part of their supply chain should be held accountable by governments of their originating countries.



Interestingly consumers are less likely to hold governments responsible compared to businesses. Only in the Traditional e-consumer group do the majority agree with this statement (54%). However, government intervention is still very much seen as a requirement to deal with human rights abuses, with even 41% of those disengaged with ethical shopping agreeing with this statement.

Statement 4

If a fashion company was committed to producing sustainable fashion in any way I am more likely to shop with them



A significant % within each consumer segment would be swayed to shop at a supplier committed to sustainable fashion. Interestingly this includes even the disengaged section (12%) i.e. those that were not aware of the brands we had shown and those who had never bought ethical labels

The full report is available for purchase on request.

Fashion images featured on this report are courtesy of http://kittyferreira.co.uk & http://deployworkshop.com