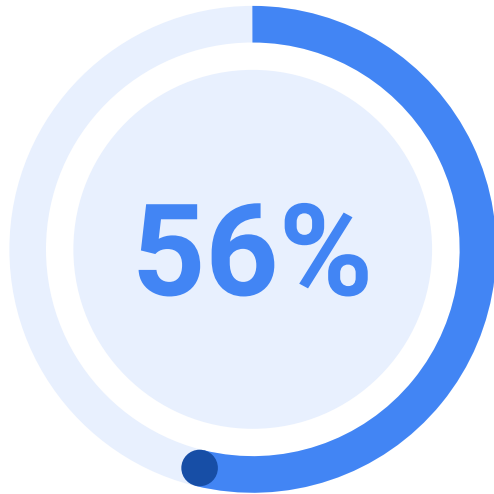




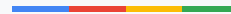
Google

The business case for sustainable fashion

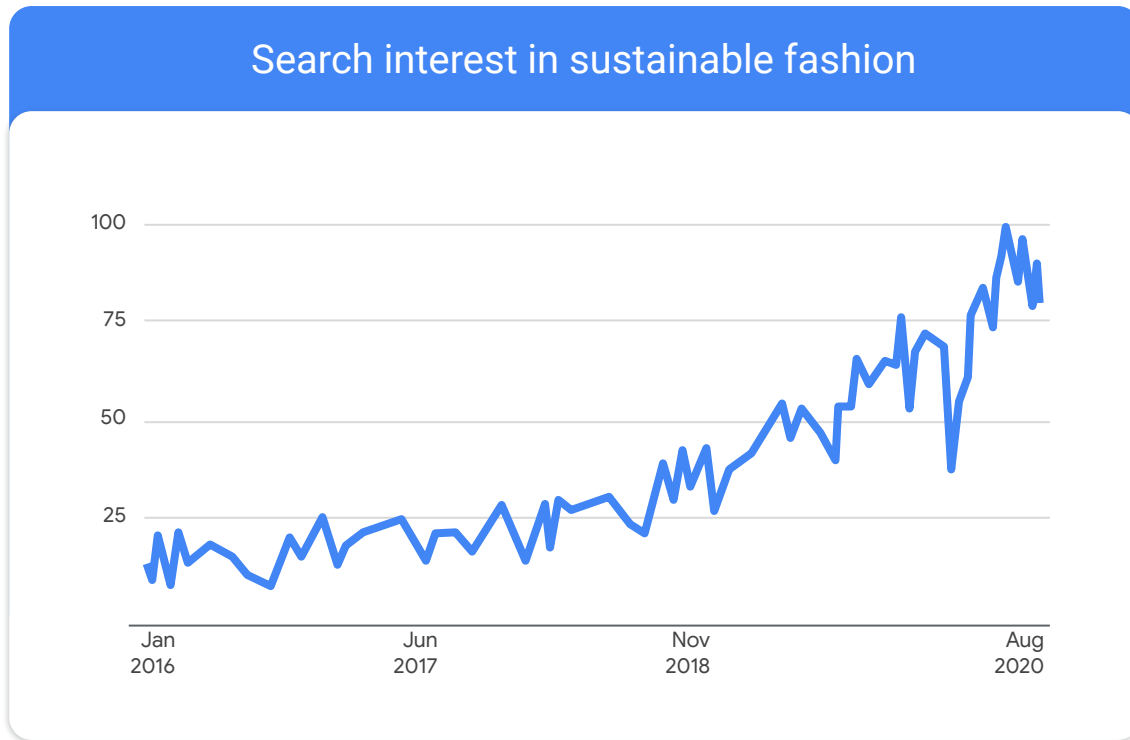
Consumers care about sustainability



Actively seek out *or* prefer sustainable fashion items



Interest in sustainable fashion is growing fast, what does this mean for the future?



Sustainable credentials create a more attractive product



Made from natural materials



+4pp

Uplift in product appeal

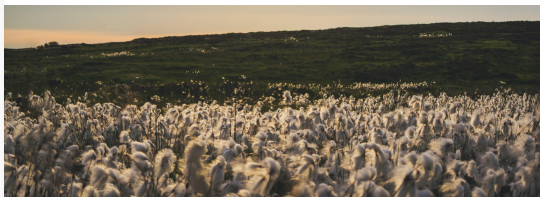
Handmade in the UK



+5pp

Uplift in product appeal

Responsibly sourced



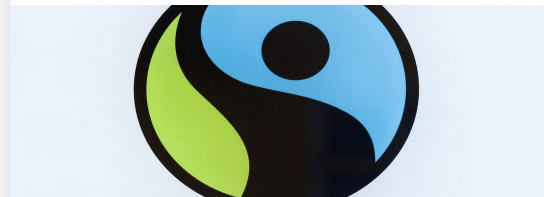
+6pp

Uplift in product appeal & value

+5pp

Uplift in quality

Fairtrade certification



+8pp

Uplift in quality

+6pp

Uplift in value

Shopper's intuition is pretty good, despite the lack of understanding

Only **8%** of shoppers (12% of 18-34 year olds) have a strong understanding of fashion sustainability.

So they turn to proxies to judge.

Top proxies to increase perceived sustainability:

Responsibly sourced **+18pp**

Fairtrade **+18pp**

Better Cotton **+11pp**

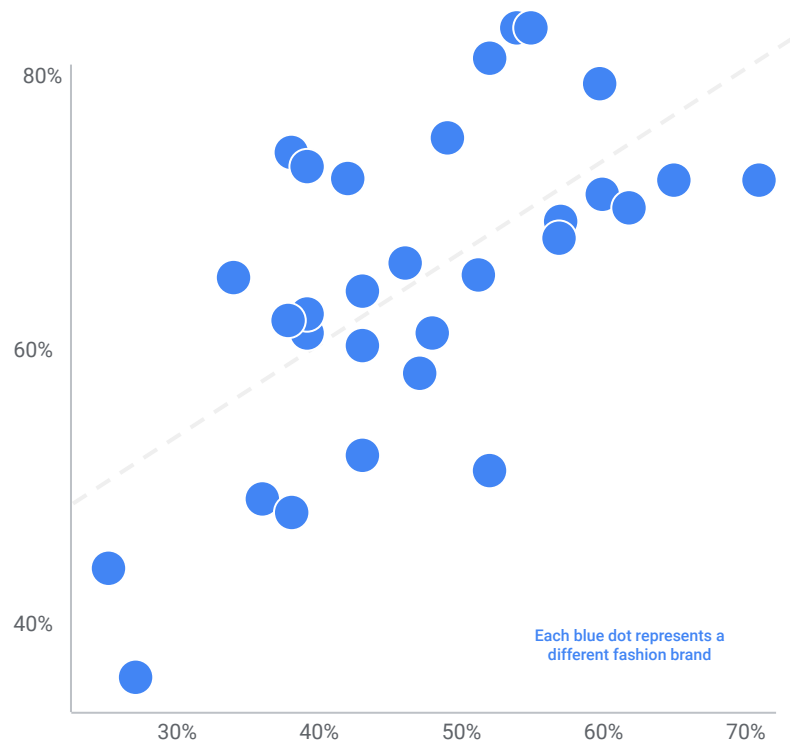
Recycled packaging **+11pp**

Natural materials **+9pp**

Brand perceptions of sustainability correlate with perceptions of brand quality



Consumer perception of brand quality

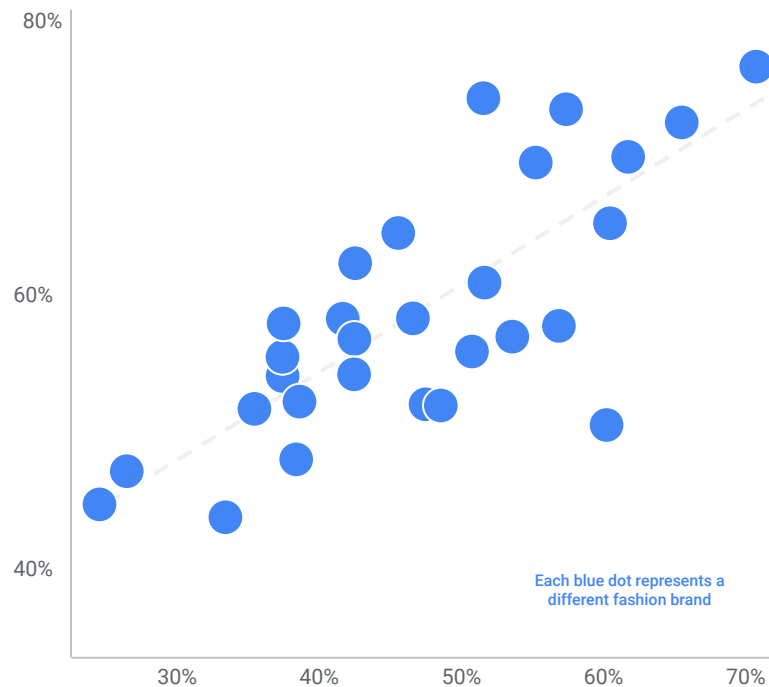


Consumer perceived sustainability by brand

Brand perceptions of sustainability correlate with perceptions of how innovative a brand is perceived



Consumer perception of brand innovation



Consumer perceived sustainability by brand

Sustainability and innovation go hand in hand

59%

Purchases made
offline are considered
sustainable

65%

Purchases made
online are considered
sustainable

Purchases made from
a retailer are considered
sustainable

60%

Purchases made
directly from a brand are
considered sustainable

70%

