THE BETTER consumer IN EUROPE:

The trends fashion companies should watch to make good decisions

texSture

Texsture Limited
March 2013
www.texsture.com

The better consumer in Europe: the trends fashion companies should watch to make good decisions

Contents

About the terminology in this report:

In this report we use the term 'better product' or 'better produced products' throughout to describe products that meet more stringent environmental and social criteria, i.e. are more sustainable. For the purpose of this present report, the term also includes products that are organic, and fair trade, as well as certified or accredited under other schemes.

However, as we review existing research, we have left the terminology untouched when quoting data or insights from the research we surveyed.

Executive Summary

"Show me there is demand, and we'll be happy to cater to it" is the most frequently received answer when asking CEOs of consumer goods companies (fashion and apparel in particular), as to why they are not producing better, more sustainable (ecological and ethical) products.

It is unfortunate that there is, as of yet, little recognition for the relatively straight-forward business case that better production implies [Willard, 2012]: from cost and energy savings, to vastly lower product liability risks and benefits for investors. However, the sheer lack of fundamental business knowledge and understanding of the benefits of producing in a more sustainable way, and subsequently producing more sustainable goods, deserves a dedicated report in its own right.

The focus of this present report is the opinion and stance of end-consumers, notably concerning the above mentioned, frequently heard statement. The report combines – to the best of our knowledge – all available data about this increasingly popular consumer demand for more responsible products in EU countries.

The summarised data holds a clear message: Generally speaking, consumers are neither purposely ethical nor unethical. In this report we show that, contrary to conventional views, the majority of consumers make purchasing decisions on an individual basis, as opposed to on pre-meditated evaluations with a specific ethical intent. Instead, we show that purchase decisions are made as a response to very particular needs and choices related to the range of products available. Importantly however, given choice, sufficient information and a comparable price/quality ratio among products, we found that a majority of consumers are willing to choose the most ethical product among those available to them, despite being valued at a slightly higher price.

It is clear that convenience remains an important factor in the equation. There is only so much time and effort consumers are willing – and able — to spend. It is without doubt that brands and retailers are required to play their part in order to give consumers easier access to the products they truly wish to purchase.

To summarise the findings of this report, the following issues will be highlighted:

The price/quality ratio is of high importance to consumers. People are willing to pay extra for better products, however, this is only the case when such products perform at least on the same level as their conventional equivalents.

Consumers are reliant on, and generally trust product labels, as well as certification and accreditation labels for better products. However, they maintain the view that sufficient information is still unavailable to them, and is not presented in a clear and easily digestible format, to fully rationalise their purchasing decisions. It is in fact product and certification labels that lead consumers to their purchasing decisions.

If chain retailers and department stores were willing to offer a larger range of better products, the market will be ready for them. Consumers want to shop for everything at their habitual grocery and department store. They expect these to offer a variety of options of better products, as part of their range. They also expect to be given a fair price for their purchases: a small price increase of up to 20% is acceptable, although only if product performance is at least on the same level as conventional alternatives. It is also necessary for credentials to be reliable, easily visible, and highlighted transparently.

Consumers resort to buying locally in order to buy sustainably, because they perceive large brands and businesses to be non-transparent and therefore untrustworthy. With more locally produced goods, the automatic assumption is that EU labour legislation and smaller transportation distances will guarantee that there will be a minimum baseline for superior ethical credentials, as well as the added value that there will be a benefit to the local economy. Factually, there is no research that supports these assumptions, however, from a consumer point of view, and given the limited resources available to the public to verify producer claims, they are understandable.

Terminology varies from country to country, as do the nuances of what is considered a better, more sustainable, product. This evidently not only affects consumer-based communications, but also the products that are most popular among manufacturers and retailers, and hence are most likely to be found in their ranges. These nuances are bound to dominate the discussions within national borders in the near and mid-term future.

We hope that this report provides the factual data for what so far seems a typical catch-22 situation: producers and brands which claim to be 'all ear' yet neglect to acknowledge the demands consumers put forward; and consumers who want to invest in better products but who equally feel that producers are inattentive to either their needs or demands as consumers.

March 2013,
Pamela Ravasio & Ilaria Pasquinelli,
Directors, texSture

1. The consumer market

There exists very little and very limited research on consumer trends and adoption of fashion products that perform better for example in terms of health impacts or sustainability. Such products are not identified by specialised product codes in the trade data of the large national and international statistics bureaus, but absorbed by their respective parent categories. As a result, research has primarily focused to date on consumer attitudes and behaviour.

The primary reason for this status quo is that it is a relatively new trend, of which the vast majority of official quantitative research figures have only been published from the mid-2000s onwards. Furthermore, the products, with the exception of organic and/or recycled fibres in particular cases, are not normally identified as being 'sustainable' and hence could not be identified for statistical purposes.

This present report therefore summarises, to the best of our knowledge, all current and relevant data in the EU with regard to consumer purchasing behaviour and strategies. It is important to note that the extent and context of available data varies from country to country, and in many cases is not directly comparable. Global data is usually released by market research agencies and other interested organisations. This therefore means that biased views supporting their own opinions cannot unfortunately be entirely excluded.

Nevertheless, the entirety of what is presented in this report is the pinnacle of available trend data broadly concerning consumer responses to products which were designed to be 'better': i.e. more environmentally friendly, produced under better social conditions, with materials and technology which address the demands of current situations.

The image this data represents gives valuable insights into how far the market for better products has evolved over the past 15 years, and what consumer expectations, opinions, strategies, and demands have become.

It can therefore be concluded that, without doubt, the overall competition landscape in fashion and textiles has come to change in a rather unexpected and challenging way. The same alterations, however, also offer fresh and as of yet unrealised market and innovation potential.

The data clearly depicts the many opportunities businesses have by becoming involved in the production of better products, therefore bringing more sustainable products to market, and engaging with consumers successfully with regards to their environmental and ethical preferences. This 'mega trend', as it is often referred to, is here to stay, and invariably will become part of our everyday lives – in a similar way to the development of the internet from a toy for geeks to a basic appliance indispensable both at home and in the workplace.

1.1. EU13: Status quo and key market trends

Consumers have never historically trusted business much. In the present, research shows that over 75% of consumers are suspicious of corporate sustainability pledges [Vaughn, 2011], and do not trust businesses fully; peer feedback and word of mouth has become more important than ever.

An equal percentage (75%) is of the opinion that large companies do not care about the environment [RD, 2012].

Additionally, 82% of all consumers have noticed a form of 'environmental friendly' claim from companies. However, among these, 54% state that they do not trust any advertised 'eco', 'green' or 'sustainability' claims (Illustration 1).

The opposite trend is surfacing with regards to brands: consumers increasingly place their trust in the value of individual product brands, and, importantly, are heavily influenced by certifications (Illustration 2).

Illustration 1:

Aware of advertiser claims but do not find them credible: 82% of people have noticed advertisers claim that their brands are environmentally friendly. Of those who have noticed, just over half (54%) do not believe these claims. Scepticism about advertiser claims is greatest in France and Netherlands [RD, 2012].

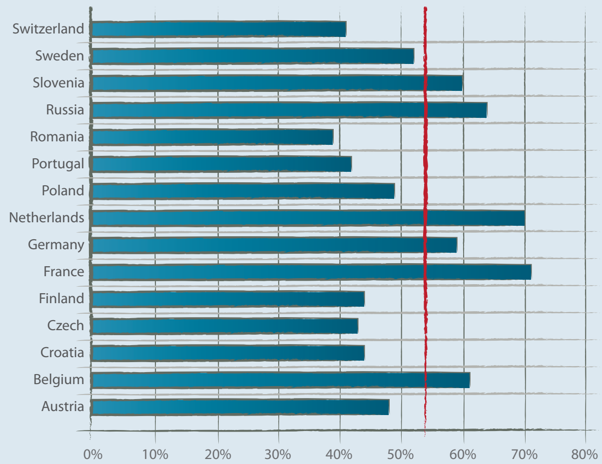
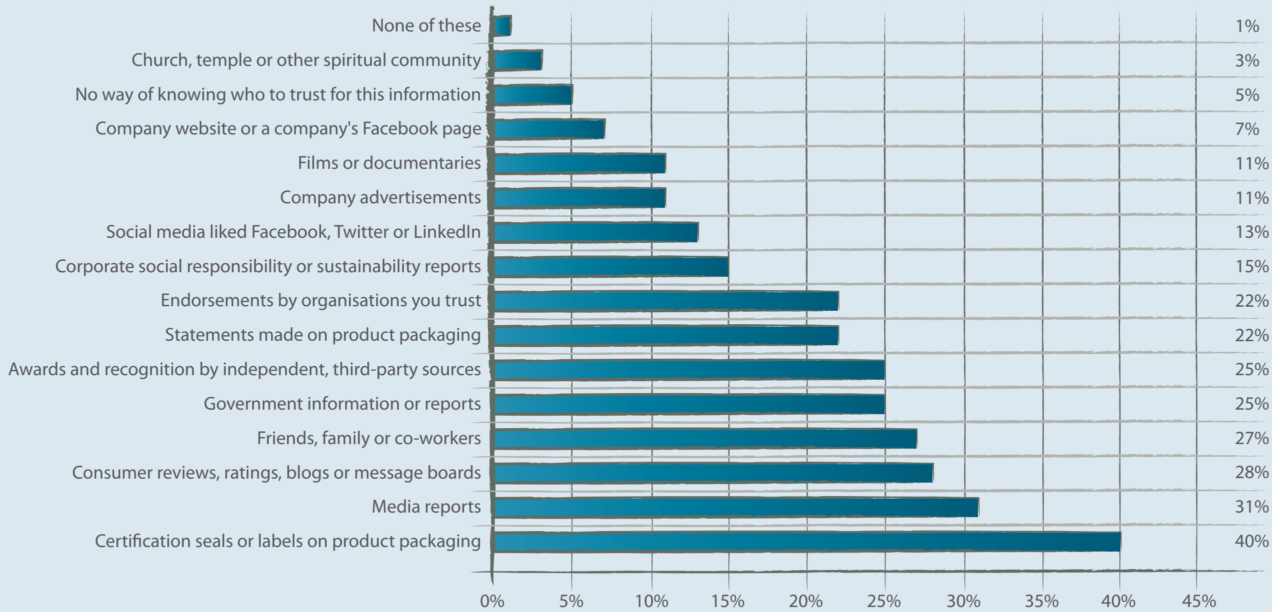


Illustration 2: Source of Trust [Bemporad, 2012].



These insights are coherent with others who found that across Europe, 65% of consumers stated a preference for purchasing fair trade brands and products over conventional ones [RD, 2012]. Bemporad (2012) further found that nearly two-thirds (66%) of respondents in six different markets believe that "as a society, we need to consume a lot less to improve the environment for future generations," and 65% say they feel "a sense of responsibility to purchase products that are good for the environment and society." As a consequence, these people prefer to buy fair trade products.

The preference is notably high in countries in Eastern Europe, such as Croatia, Romania and Russia, where only few certified products are available. (Illustration 3) This demand also correlates with the development highlighted in digital media research: when searching for the term "socially responsible products" on Google in 2011, 1.26 million hits were returned [Hawkins Brookshire, 2011]. The same Google search by the authors of this report in February 2013 returned a staggering 5.8 million hits.

Indeed, despite the continued economic defects Europe has experienced during the financial crisis starting in 2008, the Fairtrade Labelling Organisation (FLO) has registered a continued growth in their sales of all certified commodities, such as cotton. Between 2004 and 2011, Fairtrade certified goods experienced record retail sales across Europe ([FLO, 2012], Illustration 4). Interestingly, this development was not dampened, but rather quickened, by the 2008/9 financial crises and the most recent recession. The same trend applies to the retail sales of WFTO certified products which are sold through an independent network of fair trade shops across Europe, and include commodities (food), as well as handicraft products, home decoration & home textiles and clothing. Between 2001 and 2009, sales have nearly doubled from € 150 to € 290 million with a small decline in 2008. According to the most recent available data, sales continued to grow until 2011 despite the economic recession [DAW, 2011].

Further, global retail sales of organic certified products (cotton apparel, home, and personal care products) experienced a steady annual growth year on year (Illustration 5). This development aligns with the stable and steady growth of demand for global organic fibre cotton: up until 2011, there was a steady 15% growth rate in fibre production. The bulk of the consumption market growth centred around companies in the United States and Europe. In 2010, retail sales of organic cotton products were expected to reach an estimated $7.4 billion by 2012 [TE, 2011].

In 2012, the global production of organic cotton products achieved the forecast levels. However, fibre production levels fell in absolute terms for the first time in its history.

A similar development in popularity was experienced at the Better Cotton Initiative (BCI) which began in 2005 as a holistic approach aiming to minimise environmental impact and maximising social ben-

Illustration 3:

65% of consumers say they prefer to buy fair trade. This preference is greatest in Croatia, Romania, and Russia [RD, 2012].

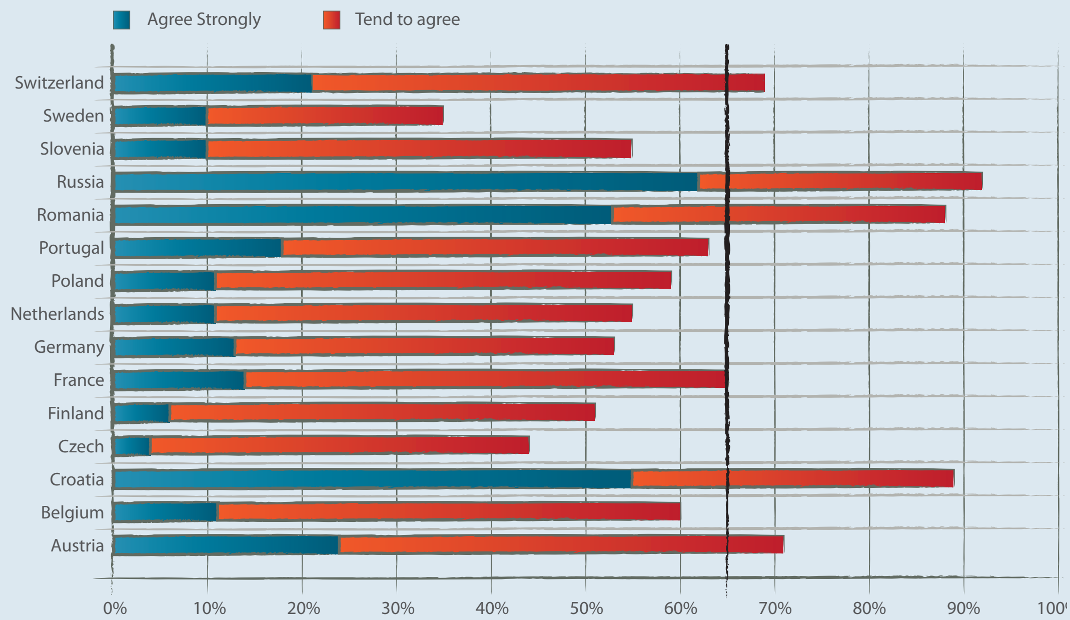


Illustration 4:

EU27 FLO Fairtrade Retail Sales, 2004 – 2011, [FLO, 2012]. Illustration by texSture.

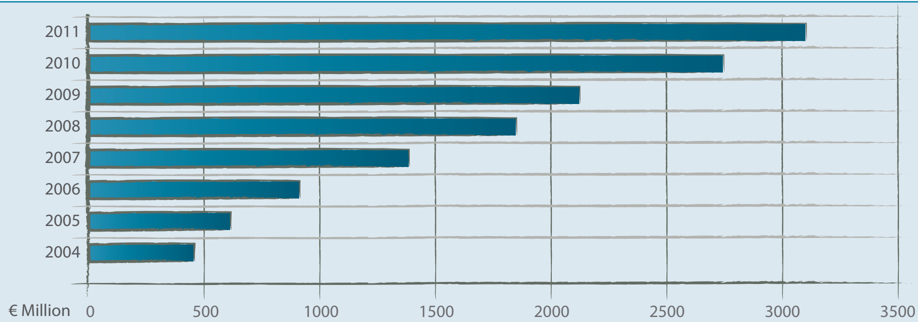
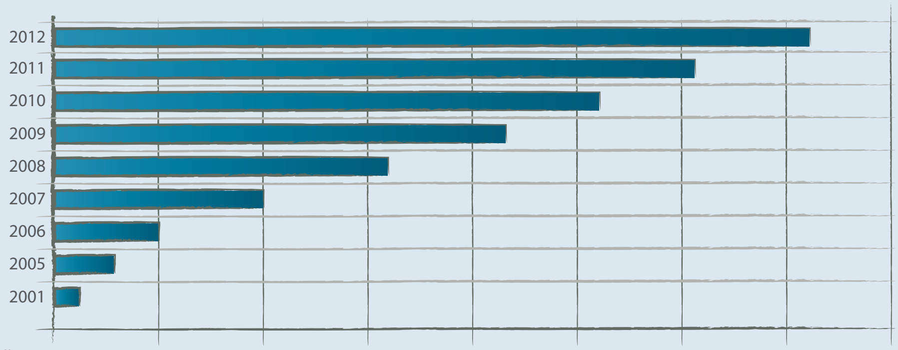


Illustration 5:

Historic and forecast retail sales of global organic cotton products as at 2010 [TE, 2011]. Illustration by texSture

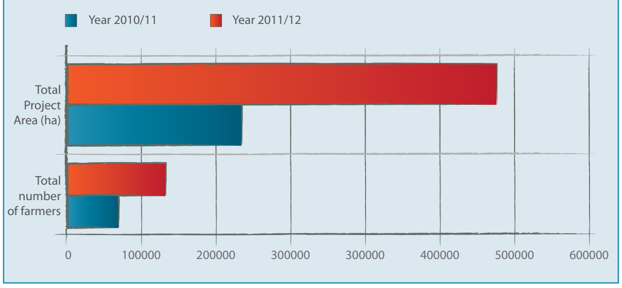


efits. Unlike Fairtrade or organic, BCI is not a certification concept, but instead follows a 'continuous process improvement' approach. It is hence a multi-stakeholder project that involves all members of the cotton supply chain from small producers to global brands and retailers.

In the period from 2010 to 2013 – the initiative's first two harvest seasons – BCI experienced significant growth ([BCI, 2012]; Illustration 6): The number of members across the whole supply chain rose from

Illustration 6:

2011 and 2012 numbers of farmers participating in BCI projects, and the respective total project area [BCI, 2012



less than 30 (January 2010) to 200 (July 2012), the majority of which were manufacturers. The number of farmers joining the platform rose from 12,500 to 32,000 and alongside them the amount of land used to grow cotton increased from 16,000 hectares to 47,500 hectares.

Interestingly, however, as soon as it involves fashion items, the consumer's focus is not firmly set on buying better [Fischer, 2012]: 77% of surveyed fashion consumers do not actively look for environmentally friendly clothing whilst shopping.

One of the reasons how this still aligns with their desire to buy better, is the consumers' intent 'not to go out of their way', and to purchase such products found at their habitually visited supermarkets or clothing chains, which will be shown later in this report (page 26: 'Convenience is key: Better consumers want to buy on the high street').

Finally, over the past 12 to 24 months, it has without a doubt become clear that new forms of consumption are emerging. Two terms most commonly referred to in this context are the 'Circular Economy' [ANNC, 2012] and 'Sharing Economy' [Sundararajan, 2013]. Where the former still leaves much room for debate, notably also at the 2013 World Economic Forum (WEF) in Davos [Waughray, 2013], the latter economic model is, at the time of writing, valued in monetary terms at around £301 billion globally, estimated at £22 billion in the UK alone [Doshi, 2012], and approximately double that in the US. The Sharing Economy is expected to grow by at least 15% over the next 5 years. These figures include areas such as car, bike, and ride sharing, impromptu B&Bs, guest beds, knowledge sharing and specialist instruction by amateurs, as well as the rental household goods market, offering everything from outdoor gear to lawnmowers.

Whilst sharing is the common theme, the entirety of these offers are indeed a wholly service-based system, based upon three primary carrier columns: product-services systems such as ZipCar, redistribution markets such as eBay, and collaborative lifestyles solutions such as AirBnB or CouchSurfing. While the monetary benefit and convenience of individuals may have been at the origin of this new economic trend, the motivation of the individual to participate is closely linked to usage optimisation of existing personal and individual resources, as well as engagement with a community of peers.

The development of the Sharing Economy links with the 'paradox of spend' [Euromonitor, 2012]: higher consumer income and expenditure are normally seen as a positive sign for retailers and manufacturers of consumer goods, based on the idea that the more money there is available to be spent, the more market opportunities they will encounter. However, in reality the situation is more complicated, and has a different outcome: the more a consumer earns (and therefore is potentially able to spend) the larger the proportion of expenditure that is spent on services. This, therefore, means that a smaller proportion of the expenditure reaches the actual consumer goods. This is a well-documented phenomenon among the high earners of the population, and is commonly referred to as the 'cash-rich, time-poor' consumption effect.

1.2 EU: Consumer attitudes and behaviours

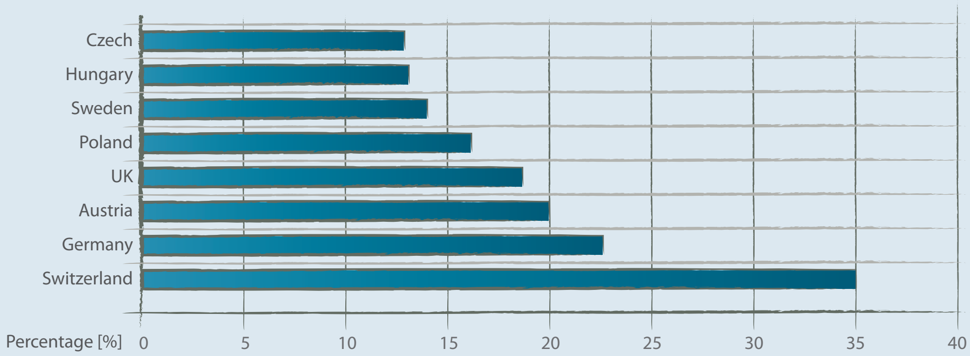
The EU27 (plus Norway and Switzerland), is a hugely differentiated market. Consumer behaviour varies significantly from north to south, and east to west.

According to a survey conducted by Goodbrand in 2012, Switzerland, Austria and Germany were the countries with the highest proportion of consumers that could be labelled as 'highly ethical' ([Goodbrand, 2012]; Illustration 7).

Generalising, it can be deduced that: The further north and west a market is, the more aware and demanding consumers are about resource optimisation and consequently better production. Accordingly, this is less often the case in markets further south and east. As a consequence, northern and western European countries are where better products are most in demand, and where consumers are the most aware. It is also these geographic areas where the 'Sharing Economy' services are the most popular.

Illustration 7:

The percentage of consumers identified by [Goodbrand, 2012] as 'highly ethical', per country



Not all of the large EU markets (UK, France, Germany, Italy, and Scandinavia), are covered to an equal extent by relevant and available research. This indicates that there are significant difference between countries concerning not only the perceived importance of better production and better products, but also precisely what this concept means and how it can be interpreted. Research has in fact identified differing perceptions between countries ([Pasquinelli et al., 2013]; Table 1).

EU country	Main dimension
Germany	Environmental
France	Environmental awareness Social (fair trade) to some extent
UK	Social and fair trade Environmental gaining momentum
Switzerland	Social & environmental Dimensions balanced equally
Scandinavia	Environmental Social assumed as a 'given' (basic prerequisite) and default characteristic

Table 1: The understanding of what better products and production are varies across different EU markets [Pasquinelli et al, 2013].

Consumer segmentation

The majority of the market research conducted so far across Europe divided consumers with better, i.e. more sustainable, consumption patterns broadly into:

- **Ethical consumers** - who regard social dimensions as the most important factor.
- **Green consumers** - who regard environmental dimensions as the most important factor.
- **'Better consumers'** - who regard both of the above as equally important. They more frequently choose to purchase, for varying reasons, high quality products with an established pedigree.

Bemporad et al. (2011) suggested a different approach to segmenting the market:

- Highly committed **Advocates** (14%)
- Style and social status-seeking **Aspirationals** (37%)
- Price and performance-minded **Practicals** (34%)
- Less engaged **Indifferents** (16%),

According to this approach, Aspirationals are the largest consumer segment, and seek both sustainability and consumption. They look for brands which provide solutions both improving their own lives as well as society at large. Aspirationals, being trendsetters, notably in emerging markets such as China and India, offer businesses opportunities to shape a new consumer environment by combining consumer aspirations and desires, with more sustainable products and lifestyle choices [Bemporad et al., 2011].

A different market segmentation was put forward as follows [Bathen et al., 2011]:

- **Deniers (8%)** are often relatively young, male consumers. They show hardly any interest in sustainability, do not believe that better consumption has any impact at all, and are resilient to new information.
- **Sceptics (25%)** are typically male and somewhat older then Deniers. Sceptics have a moderate interest in questions of consumption ethics, and are characterised by a lack of engagement.
- **Pragmatics (34%)** are either male or female, and mostly present among Generation X and baby boomers. These consumers are aware of their responsibility as consumer – for 82% ethical credentials are a firm part of their purchase decision. However, they consider it sometimes too complicated to shop ethically.
- **Activists (34%)** are people who look at the sustainability agenda from a holistic perspective; from environmentally and socially correct production and sales, to local production. They see a definite added value in responsible production.

Finally, the following consumer needs-based segmentation specifically applies to the EU market for home decoration and home textiles [Vermeulen, 2013]. The three presented segments then translate into 14 different sub-needs, with very separate underlying reasons-to-buy. Interestingly, they all inherently include sustainability-related needs:

- Driven by **Need for purpose**

Example of sub-need: Smart - products that are modular, collapsible, durable.

- Driven by **Need for meaning**

Example of sub-need: Buy-once - products that are considered investments.

- Driven by **Need for excitement**

Example of sub-need: Creative - products that allow consumers to modify them personally.

Consumer attitudes towards environmentally friendly, better products

***Note to the reader:** In this section, we use the terms as used in the original research cited in this chapter.*

Consumers around the world define 'green' (in this context strictly meaning 'more ecological') differently depending on the country and culture they live in ([Manget et al., 2009]; Illustration 8).

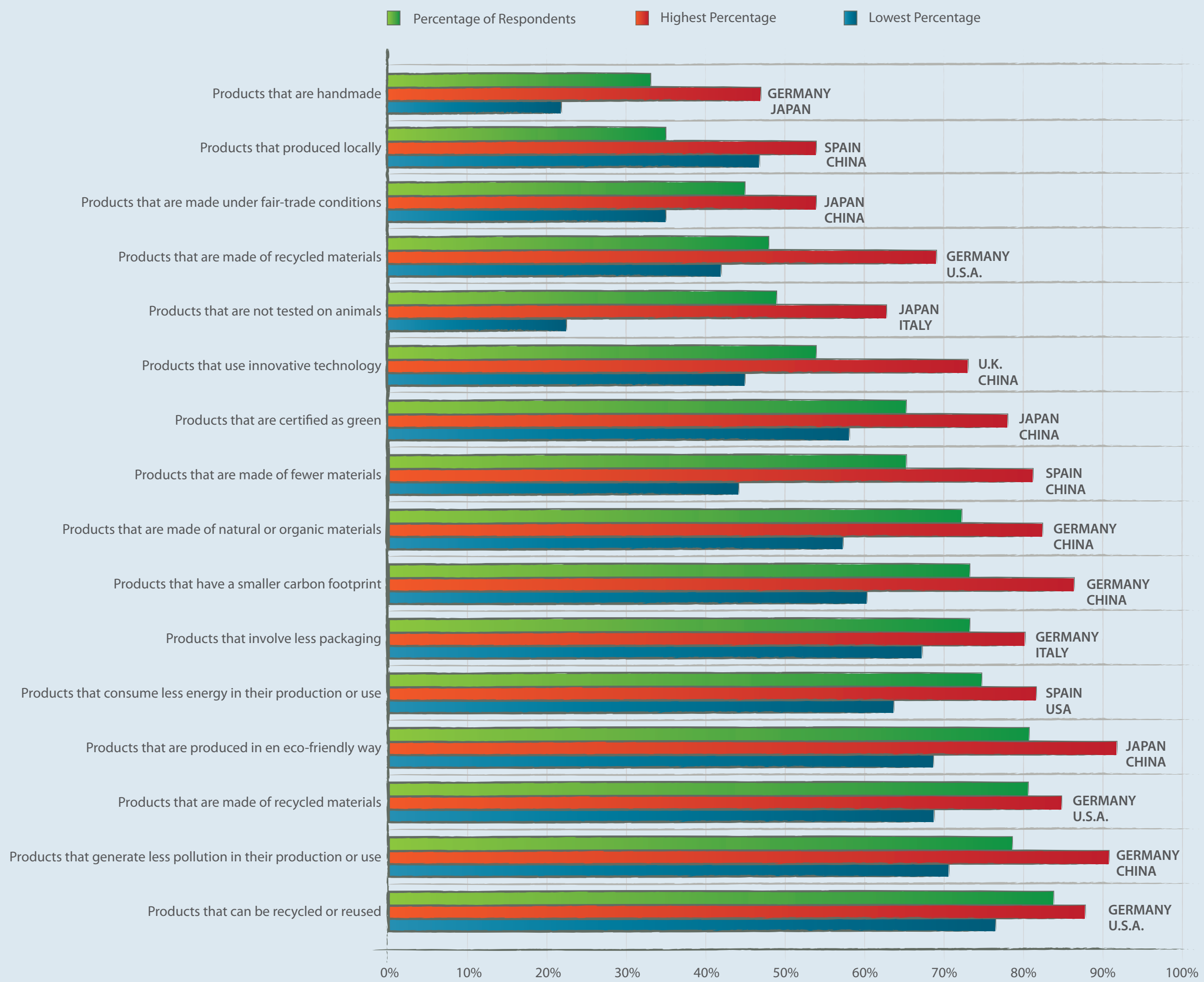


Illustration 8: What are green products? Consumers around the world define 'green' differently. Percentage of respondents who agreed or strongly agreed with the above statements. [Manget et al., 2009].

Surveys have shown that consumers, in principle, are willing to spend more for greener, or more ethically produced products[1]; the development of the fair trade movement (pp. 7) proves this. However, the same research also shows that consumers are not willing to compromise on the quality, performance or design of a product. The historic legacy of early consumer movements has produced a cliché of expensive, under-performing but well intended 'green' products (Table 2). Whilst this may have been previously accurate if the product quality is now investigated, it is no longer true (Illustration 9): In the present consumers generally rate green products as more favourable to conventional alternatives.

This is in agreement with two further studies: First, Bemporad et al. (2012) (Illustration 10, Illustration 11) reported that the majority of consumers globally

1 Consumers in developing markets (Brazil, China, India) are more than twice as likely as their counterparts in developed markets (Germany, United Kingdom, United States) to report that they purchase products because of environmental and social benefits (51% to 22%), are willing to pay more for sustainable products (60% to 26%) and encourage others to buy from companies that are socially and environmentally responsible (70% to 34%). [Bemporad et al., 2012] For 3 years in a row, those who would pay a premium for a product produced in a responsible way increased from 44% last year to 53% in 2011 [HM, 2012].

agree or strongly agree that they would "purchase more products that are environmentally and socially responsible" if they "performed as well as, or better than, products they usually buy" (75%), "it didn't cost more" (70%), and "companies' health and environmental claims were more believable" (64%). Similarly,

Agree Strongly / Tend to agree	2012
Environmental brands are too expensive	78%
I'd like to buy brands that are good for the environment, but they're not as effective	52%
I prefer to buy Fair Trade	65%

Table 2: Reputation of environmental brands [RD, 2012].

Nielsen (2012)'s results also suggested that 45% of consumers are willing to pay extra for products and services from responsible companies. Håvik Austgulen (2013) reported similar numbers.

Finally, research into the willingness of consumers to pay premium prices for organic cotton garments suggests that two main factors explain the willingness to pay premium prices [Ellis et al., 2012]. Both factors reflect attributes that are, unsurprisingly, also driving price premiums for products with conventional (non-green) pedigree credentials:

- Higher Overall Quality: Consumers who believe that organic cotton clothing is of higher quality are generally ready to pay a premium price.
- Tactile Quality Characteristics: Shoppers who place a slightly higher level of importance on the touch and feel of apparel products are generally more willing to pay a premium price for organic cotton. This may be connected with the consumer's belief that organic cotton is softer than conventional cotton due to the lack of harsh chemicals used in growing and processing the cotton.

Illustration 9:

How does the quality of green products compare with that of conventional alternatives? [Manget et al., 2009].

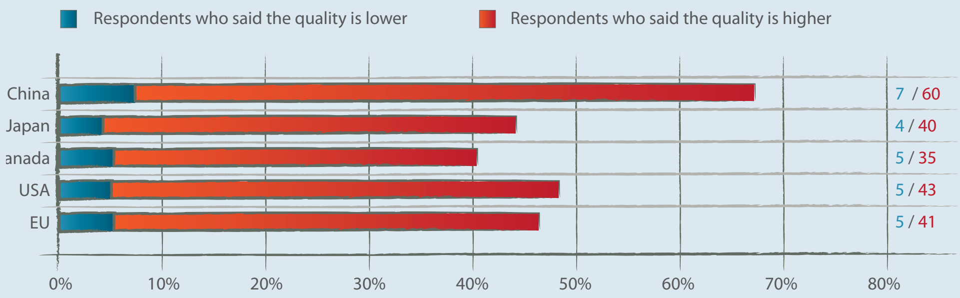


Illustration 10:

The most common good behaviours. Question: 'Please indicate how often you have done each of the following in the past year'. Scale: 1 = Never done; 5 = do it all the time. Shown: Percentage who chose 4 or 5 shown. [Bemporad et al., 2012]

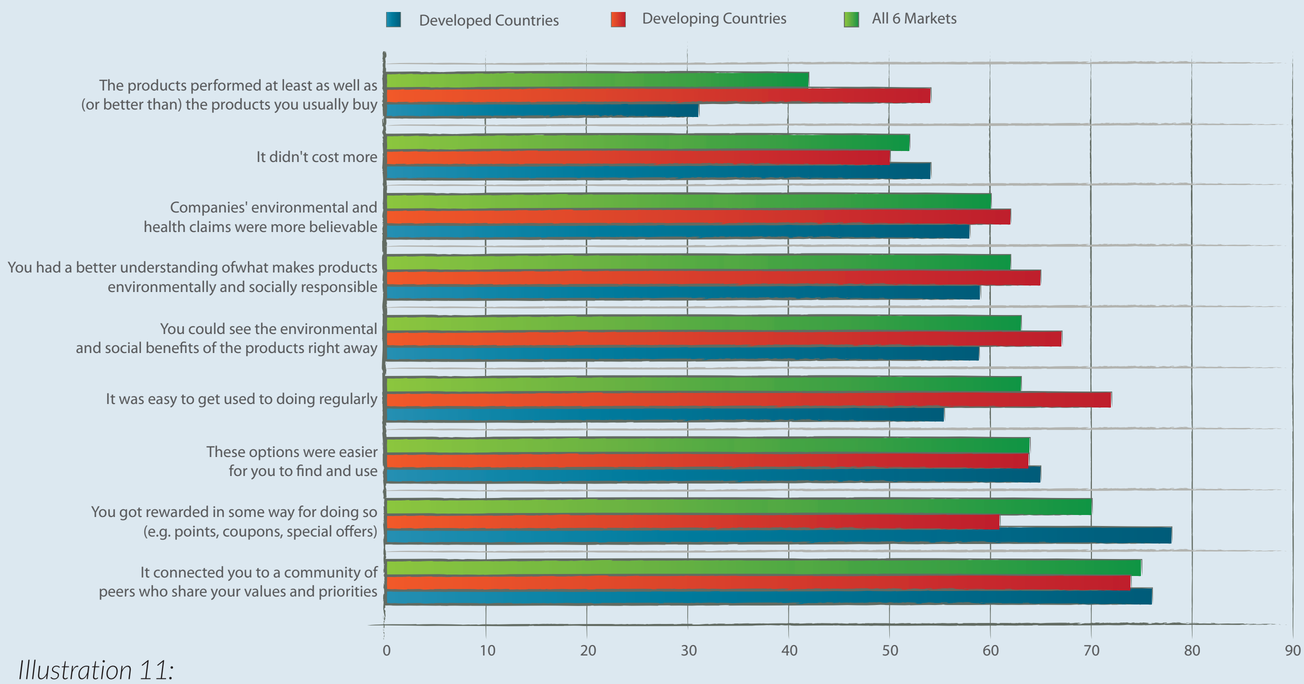


Illustration 11:

Common barriers and levers to sustainable purchasing. Question: 'You would purchase more products that are environmentally and socially responsible if …?' Scale: 1 = strongly disagree; 5 = strongly agree. Shown: Percentage who chose 4 or 5.[Bemporad et al., 2012]

Consumer attitudes towards better companies

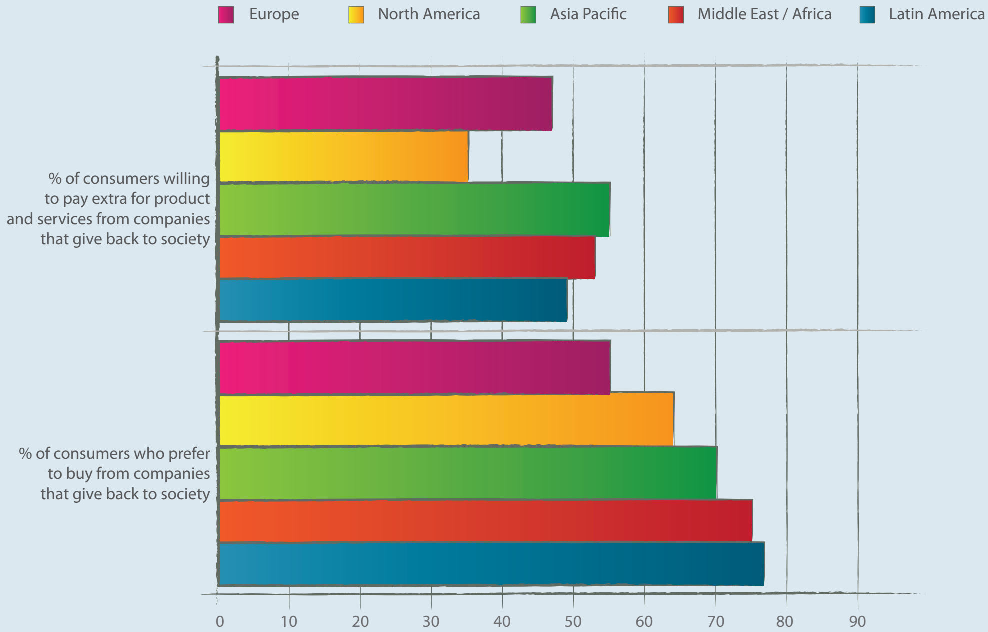
Two-thirds of consumers globally (67%) are "interested in sharing their ideas, opinions and experiences with companies to help them develop better products or create new solutions," while seven in ten consumers globally (72%) believe in voting and advocating for issues important to them [Bemporad et al., 2012]. Also, those prepared to reward responsible companies by choosing to purchase their products has increased by 11% from 2010 to 2011 [HM, 2012], amounting to more than half of all consumers (51%).

Nielsen (2012) also reported similar figures: "Two thirds (66%) of consumers around the world say they prefer to buy products and services from companies that have implemented programs to give back to society. That preference extends to other matters, too: they prefer to work for these companies (62%), and invest in these companies (59%)" (Illustration 12).

Further, three in four respondents globally say that the government (76%), businesses (74%), and consumers (74%) should be very or extremely responsible for "working to improve the environment and society for future generations." Two-thirds of respondents (65%) said that they personally "feel a sense of responsibility to society" [Bemporad et al., 2012] .

Illustration 12:

Alignment of personal values with shopping preferences, by continent [Nielsen, 2012]. Illustration by texSture.



Similar numbers were reported by Håvik Austgulen (2013) where between 43% (Sweden) and 63% (France) of consumers believe that it is "the government's job to implement measures to address environmental concerns in the textile and clothing industry". However, 45% of consumers believe that they have a responsibility as a consumer to purchase products which are as environmentally friendly as possible.

Furthermore, SAGC (2011) found that 78% of consumers think that "businesses have a duty to offer sustainable product lines instead of, rather than in addition to, unsustainable ones". Importantly however, 61% of consumers do not trust brand advertisements claiming to support the environment [RD, 2012].

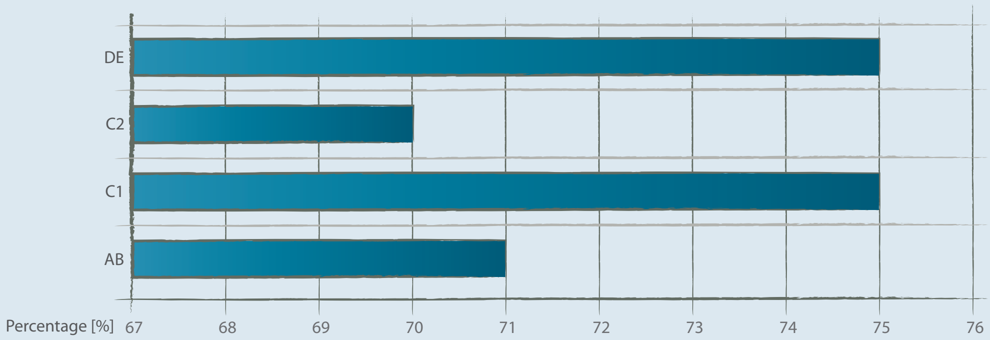
Illustration 13:

Most consumers think it is important or very important for companies to be green [Manget et al., 2009].

These results are reinforced by Manget et al. (2009) (Illustration 13): Even during the financial crisis of 2008, or maybe because of it, 75% of consumer wanted companies to release information on their environmental impact; 73% said that to them it was important that companies had a good environmental track record; while 66% demanded that companies offer 'greener' products. In France 55% of consumers even think that companies should be a role model for consumers [Pastore-Reiss, 2012].

Broken down by socioeconomic group, British retailer Sainsbury found that 71% of AB consumers, 75% of C1 consumers, 70% of C2 consumers, and 75% of DE Consumers considered it important "to do business in a responsible manner". In other words: two-thirds of the entire population considers it important that companies act responsibly in their core operations ([Cole, 2012]; Illustration 14).

Illustration 14: Importance of 'doing business in a responsible manner', by socio-economic group. [Cole, 2012]



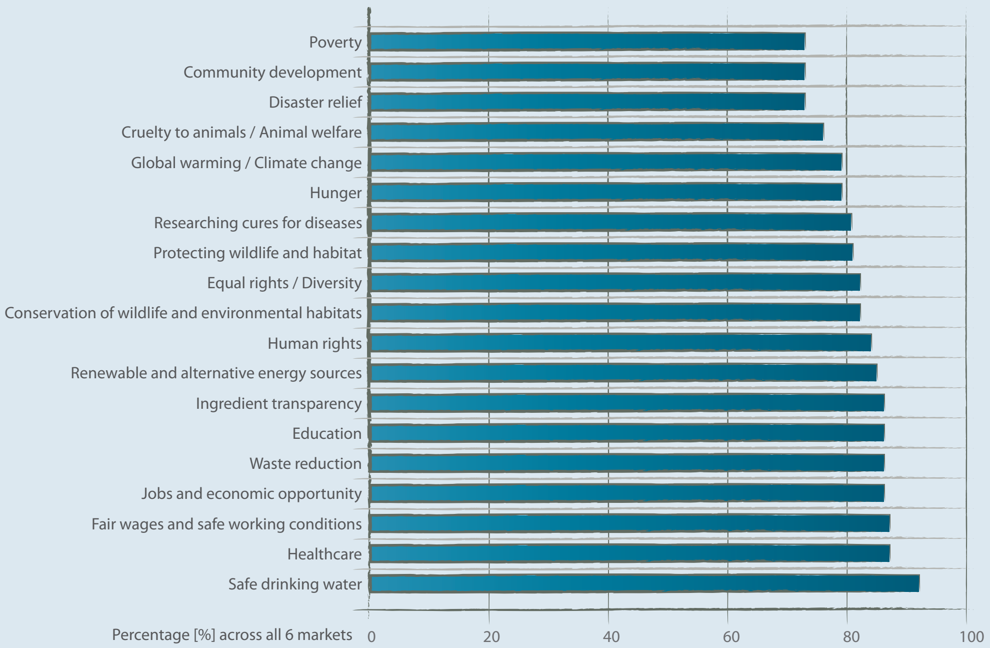
But what do consumers consider the primary issues companies should address as part of their products, services and operations?

92% of consumers say that safe drinking water is top priority. 87% consider healthcare the most prevailing issue, a percentage matched by those considering fair trade and safe working conditions the main priority; 86% of consumers believe that jobs and economic opportunity is the most important issue, with an equal number of consumers considering waste reduction of highest importance ([Bemporad et al., 2012]; Illustration 15).

The importance of environmental sustainability in the minds of consumers is reiterated by Nielsen (2012). Presented with a list of 18 causes drawn from the United Nations' Millennium Development Goals [MDG, 2000] and other globally popular corporate social responsibility topics, 66% of socially-conscious consumers present environmental sustainability as a cause companies should support. 56% consider improvements to science, technology, and mathematical education as key. Finally, 53% think that brands should act to help eradicate extreme poverty and hunger.

Illustration 15:

The most important issues in the eyes of consumers, that companies should address as part of their products, services and operations. [Bemporad et all, 2012].



2. Consumer attitudes and behaviours, by EU country

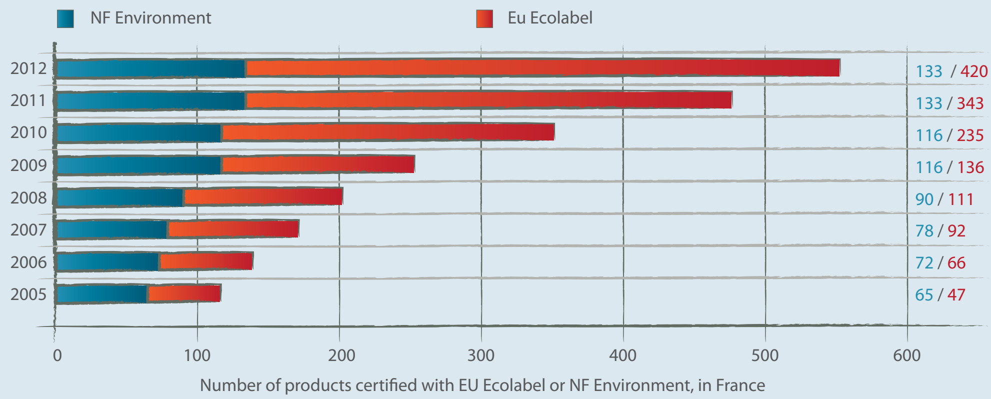
In the north and west of Europe consumer attitudes towards better production methods (both food and non-food) as well as the products themselves, have changed. This is as a result of a larger proportion of the population being well-informed and demanding more action from companies regarding environmental and social dimensions.

France

The number of EU eco-label or NF Environment (the official French ecological accreditation) certified products nearly tripled (from 201 to 553) since the beginning of the financial crisis in 2008 ([Ecolables, 2010]; Illustration 16).

Illustration 16:

Number of certified Ecolabel EU and NF Environment products in France [Ecolables, 2010]



Despite this increase in popularity of eco-certified products, the historic cliché as to who makes better fashion choices still prevails: The stereotypical view of consumers of 'better fashion' is female, aged 40+, unfeminine, with an outdated taste, a simple and healthy life, activist opinions and a focus on environmental issues.

The reality however, is different. It is in fact younger career women who mostly intend to buy better. The outdated perception can be explained through the historic link between ethical fashion and fair trade products, the latter of which is associated with a political consumerist movement. Hence, today, despite a changed consumer landscape and data proving otherwise, sustainable fashion consumption is still, by the population at large, perceived as conservative if not even extremist, backward, and with strong solidarist values [Ricchetti et al., 2011]

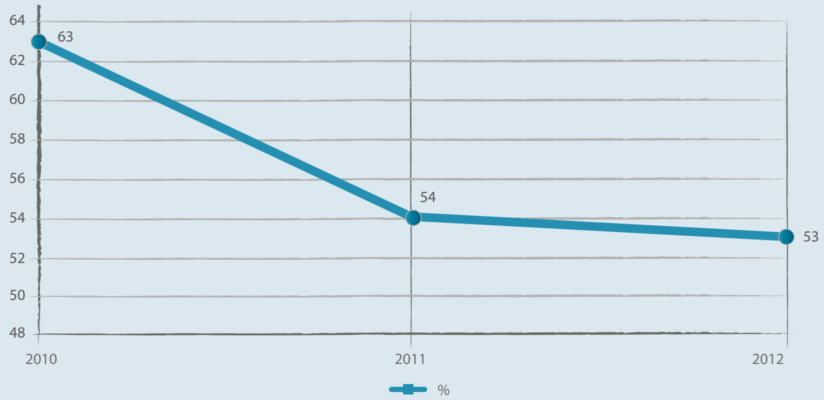
It therefore comes as no surprise that the majority of French consumers interpret sustainability mainly as products holding social attributes (e.g. made according to fair trade principles). As far as fashion is concerned, many consumers are sceptical about the ethical claims of high-street retailers, although it is this retail channel that is currently leading in the production of goods with ethical credentials, by making them available to consumers on a broad scale. 77% of consumers state that for 'ethical fashion', 'no child labour' is an important criterion; and 58% feel that 'respecting employee working conditions and paying them a decent wage' is absolutely necessary. Furthermore 60% of consumers believe it is predominantly about 'helping develop the underprivileged population'. 38% of consumers state that a label would help them to buy better and be confident of their purchases [IFM, 2009].

Three in ten French consumers say they try to buy used or pre-owned rather than new items, although almost the same proportion (27%) say the extra cost of environmentally friendly products is not worth it [NG, 2013]. This said, consumers are not in principle averse to higher prices for better products (49% saying a price increase can be justified on occasions), but are reluctant to give companies a blank cheque to do so. 60% of consumers consider it as absolutely key that the increase of prices as a result of either environmentally friendly or social responsible production claims, are accompanied by respective material and verifiable proof [IFM, 2010].

Whilst the quality and performance reputation of better products has changed for the better in the last few years (63% of consumers lacked confidence in product quality in 2010 opposed to 'only' 53% in 2012), the lack of transparency has been identified as a continuing cause for concern: 51% of consumers would like to have further detail about the origin of raw materials, and 49% would like to have further detail on the production location ([Pastore-Reiss, 2012]; Illustration 17, Illustration 18).

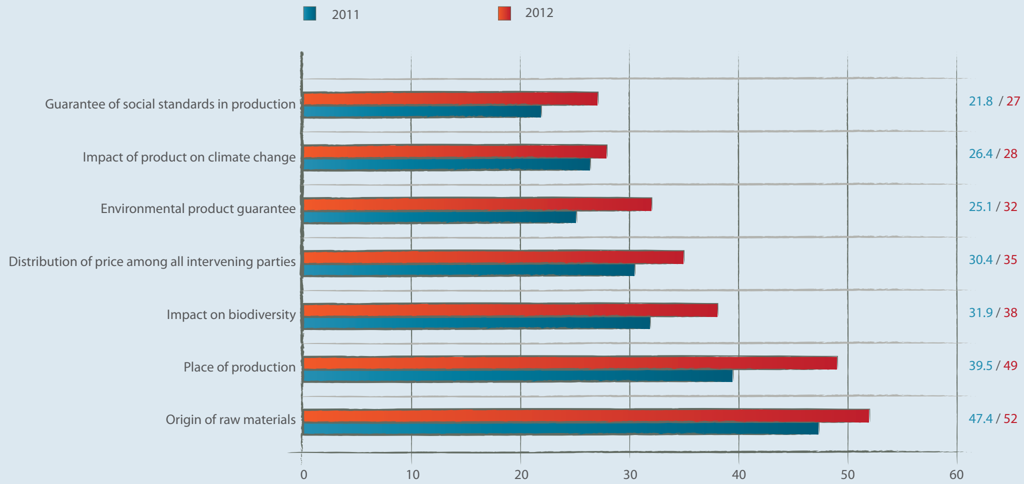
Illustration 17:

Trust in the quality of better products has increased, although half of consumers are still wary. Statement: 'I'm not sure about the quality of sustainable products'. Percentage of respondents responding affirmatively. Trust in quality of sustainable products [Pastore-Reiss, 2012]



llustration 18:

Question: 'What information would consumers like to have on product labels?' [Pastore-Reiss, 2012]



Germany

With regard to environmental dimensions, Germany has been at the forefront for several years, particularly in regards to food. Only relatively recently have environmental considerations become important in non-food items as well. There is though little evidence that ethical issues have any effect on consumers' fashion purchase behaviour, specifically in fashion and textiles [Joergens, 2006]. When making fashion purchases, personal needs are primarily what motivates consumers into buying garments. Personal needs therefore take precedence over ethical issues in fashion purchases.

Yet, a 2011 investigation among German consumers has indicated that 72% of consumers hold ethical criteria as a key influence on their purchase decisions [Bathen et al., 2011]. 85% also say that they at least occasionally buy products which have been produced 'ethically correctly', and 41% say they do so frequently (increased from 26% in 2009)

However, consumers feel that they are often unable to make good choices, and indeed 61% feel overwhelmed when trying to buy better. 83% of consumers want garment labels to be used to display the credentials of production and the brand. However, only 70% of consumers state that they are actually well-informed about the brands' and manufacturers' production practises [2hm, 2012] Only 30% could name one brand with better credentials. Among the mentioned brands HessNatur was, at 34%, the most frequently mentioned brand, followed by Trigema (28%). Other brands scored less than 10% of votes. While only 35% of consumers have trust in companies, a huge 77% say that they experience an automatic, immediate basic trust in companies that offer better products [Bathen et al., 2011].

The awareness of German consumers extends to the area of interior design and furnishings [Huber et al., 2012]: A survey involving 1,000 consumers of furniture and furnishings aged between 16 and 69 revealed how these concerns and demands for information translates into the interior design and furnishings area. It is important to take note the way in which the details of ingredients and manufacturing processes are clearly at the forefront of German consumer awareness (Table 3):

Age range[years] in %	16-24	25-30	31-40	41-50	51-59	60-69	Total
% of population	11	12	17	26	19	15	100
When I dispose of old home furnishings, it is important to me that these should be either reused or recycled in an environmentally compatible way.	44	43	53	54	66	66	56
Protecting the environment and natural resources is important to me when buying home accessories, even if this means paying more for them.	29	26	36	37	42	49	37
When buying furniture and furnishings, I make sure that it was produced in line with sustainable and socially responsible standards.	28	18	29	35	39	42	33
In my choice of home furnishings I take care only to use products that do not have a negative impact on my health.	40	35	37	55	55	59	49
When I buy textile home furnishings I pay attention most of all to the type of material.	43	40	42	48	57	56	48
When buying furnishings, I know exactly what materials to avoid in regards to allergies or intolerances.	35	29	33	45	45	43	39
It is very important for me to have innovative home textiles with special functions (e.g. that absorb sound, reduce odours or regulate moisture or that are hypo-allergenic and antibacterial).	32	22	22	34	38	44	33
I make sure that only natural substances and materials are used for the furnishings in rooms in which I spend a lot of time.	21	22	26	34	36	39	31

Table 3: Sustainability: Green lifestyle is changing consumption. Attitudes to sustainability and environmental awareness, from lifestyle to healthstyle, by age (agreement in %) [Huber et al., 2012].

Looking at household incomes, it can be concluded that the vast majority of surveyed people are middle income, and, to some extent, affluent consumers (ABC1). While there do exist important numbers of less-affluent consumers who are well aware of sustainability or sustainable design and save money to purchase the products which really correspond to their needs, the same survey revealed a greater concern about environmental issues among German consumers with an income higher than € 2,000, as is shown below (Table 4).

Net Household Income [1000€] per month / in %	< 0.6	0.6-1	1-2	2-3	3-4	> 4	Total
% of population	11	12	17	26	19	15	100
When I dispose of old home furnishings, it is important to me that these should be either reused or recycled in an environmentally compatible way.	40	54	57	57	53	62	56
Protecting the environment and natural resources is important to me when buying home accessories, even if this means paying more for them.	27	35	33	39	45	43	37
When buying furniture and furnishings, I make sure that it was produced in line with sustainable and socially responsible standards.	20	24	29	36	41	41	33

Table 4: Sustainability: Green lifestyle is changing consumption. Attitudes to sustainability and environmental awareness by income (agreement in %). [Huber et al., 2012].

Asked if they were prepared to pay a higher price for various attributes related to purchased home goods (e.g. curtains, carpets, decorative fabrics, bed linen etc.), consumers stated that they were prepared to pay up to 20% more if the product was sustainably produced (Table 5). An earlier consumer survey, conducted in 2008, identified an equal percentage across yet a larger range of products [[GfK, 2008], as quoted in [Pirenz et al., 2009]].

Finally, more generally speaking, Germans are among those most likely to repair something rather than replace it, and are among the least likely to favour disposable household items over those that can be reused. Levels of recycling from German consumers are among the highest reported, with a 81% of consumers recycling all of the time or often [NG, 2013].

Willingness to pay a higher price [% of responses]	0% none	< +10%	< +20%	< +50%	> + 50%
Additional Health Benefits	22	36	32	8	3
Additional benefits (sound absorbent, odour absorbent, etc)	22	41	29	6	2
Sustainable Production	28	43	23	5	2
Stylish Design	36	30	25	8	2
Uniqueness	37	26	22	10	4

Table 5: Willingness to pay a higher price. Research question: 'How much extra would you be willing to pay for furniture and fittings (e.g. curtains, carpets, wallpaper, decorative fabrics, bed linen, etc.) that fulfilled the following criteria?' (Agreement in %). [Huber et al., 2012].

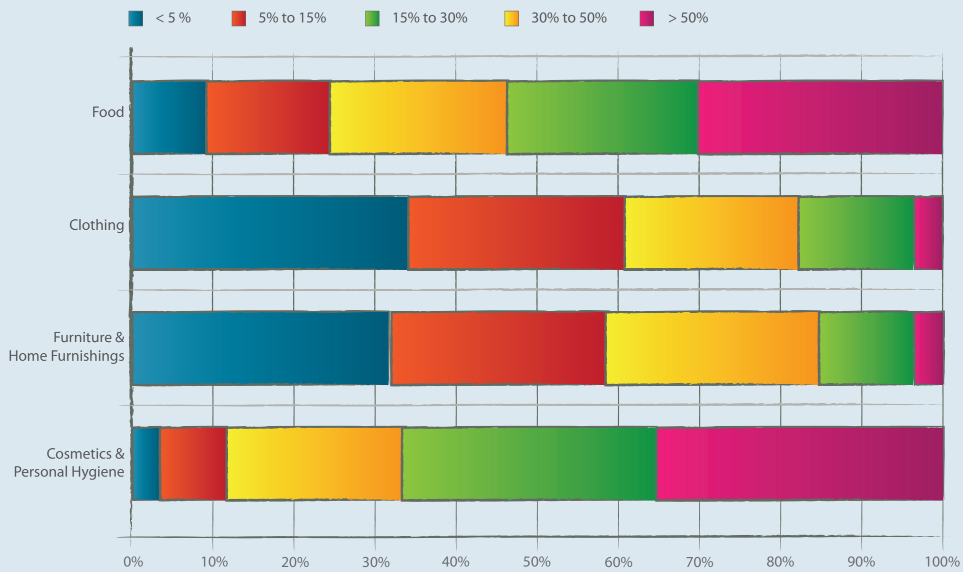
Italy

In Italy, it is also food and personal hygiene products, including cosmetics, that are most frequently bought based on 'better' decisions. However, 27% of consumers extend their decision-making along better consumption patterns, at least occasionally, to clothing and interior decoration. Another third have already developed, or are in the process of developing a regular buying habit in these areas ([AV, 2012]; Illustration 19).

A company's effort and credibility in how they build credentials is often a deciding factor in how and when better products are purchased. Social and environmental efforts are thereby almost equally as relevant (Illustration 20). Discounts, gifts, and loyalty points, however are irrelevant – they are a convenient extra, but do not cause any final purchasing decisions, which perhaps comes as a surprise to many shop owners and department stores. Finally, 64% of consumers state that if they were to choose between two brands, given an equal level of quality and price, they would definitely favour the brand taking measurable actions to protect the environment ([GPF, 2011]; Illustration 21).

Illustration 19:

Question: 'What percentage of your purchases in the following areas are eco?' [AV, 2012]. Illustrated by texSture.



It remains to be said however that Italians still share a frequent preconception that sustainable consumption automatically implies a compromise on aesthetics [Ricchetti et al., 2011].

Illustration 20:

Question: 'When having to choose between two products, price and quality being equal, which of the following factors influences your choice?' [AV, 2012] Illustration by texSture.

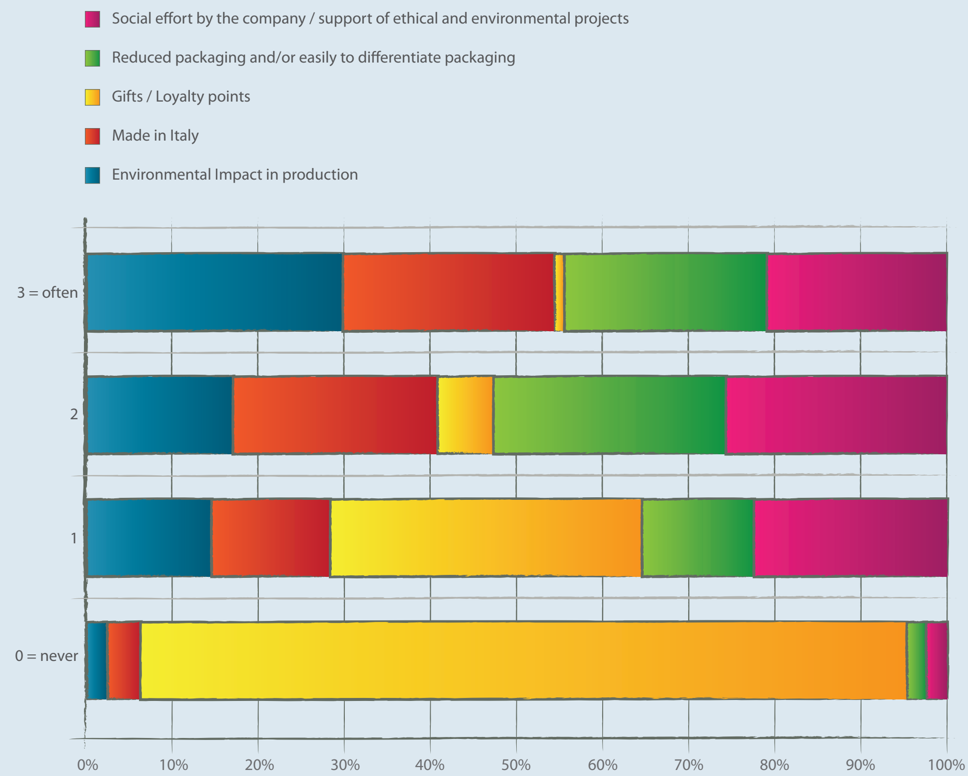
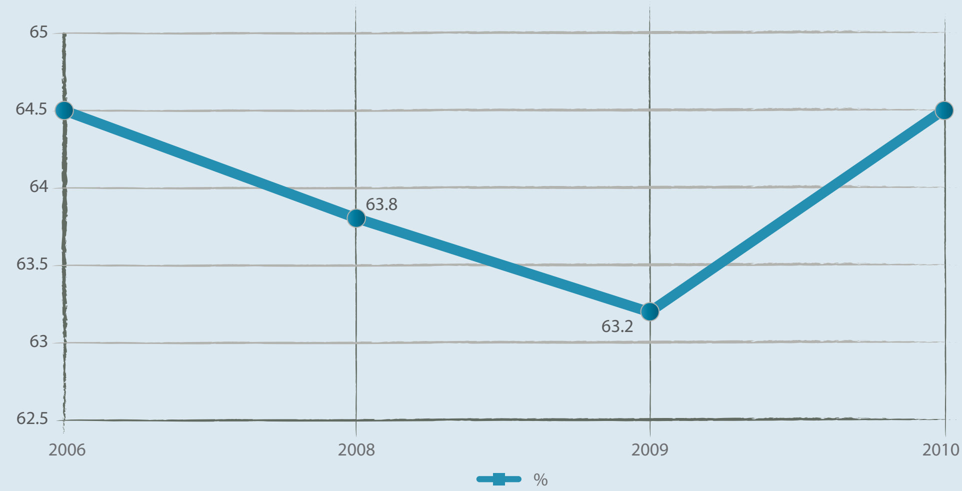


Illustration 21:

Question: 'If I have to choose between two brands, I'll choose the more environmentally responsible one'. [GPF, 2011]

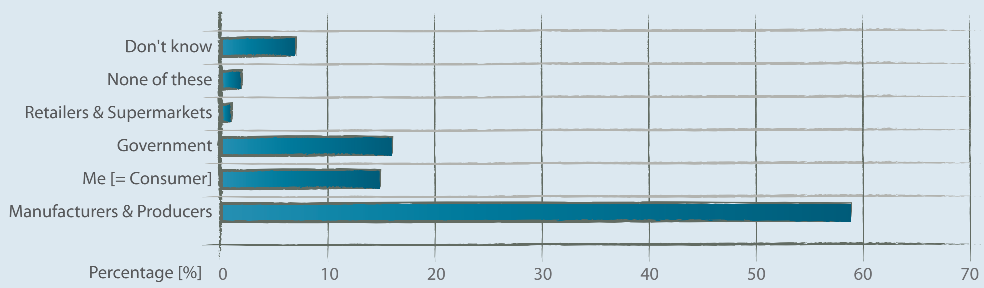


Scandinavia

Scandinavia is already relatively advanced regarding awareness on sustainable dimensions, and research suggests that the younger generations are increasingly buying into better and more sustainably produced apparel [Dielemans et al., 2012; Euromonitor,

Illustration 22:

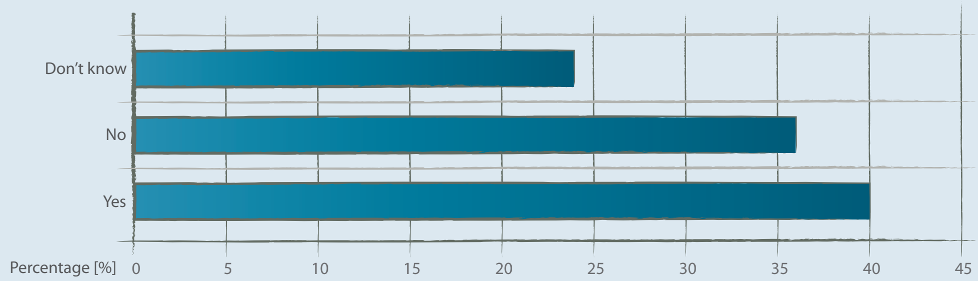
Consumer perception of responsibility to reduce product carbon footprints. Question: 'Who do you feel have the largest responsibility to minimise the carbon footprint from the services and products you buy?' [Hansen, 2010]



2012]. Consumers are well informed on available sustainable (design) products and ethical issues. Importantly: 40% of all Scandinavian consumers are willing to pay a premium for a product that offers a reduction in their carbon footprint, whilst 36% are not willing to pay more (32% of this 36% believe the products are a scam, and 29% cannot afford to pay extra; Illustration 22). 24% are not entirely sure about how they would decide ([Hansen, 2010]; Illustration 23). When asked how much extra they were willing to pay for a climate-friendly product, the respondents suggested approximately 30%.

Illustration 23:

Willingness to pay more for a reduced product carbon footprint. Question: 'Are you willing to pay a premium for a product to minimise your carbon footprint?' [Hansen, 2010]



Scandinavian consumers take it for granted that products are made according to fair social conditions. This results in their focus on the environmental credentials of products. Illustration 22 reveals that they hold the viewpoint that manufacturers are primarily responsible for ensuring that goods are eco-friendly. To verify the respective claims by some manufacturers, over 55% of consumers rely on product or certification labels when making their purchases [Iqbal, 2011].

Further research shows that Swedish consumers are globally the most likely to prefer to buy used or pre-owned goods rather than new ones (32% vs. a global average of 22%) [GN, 2012]. They are also the least likely to buy disposable products over goods that can washed and reused. Similar numbers can be expected from Norway, and – to a lesser extent – Denmark.

United Kingdom

The UK is possibly the most paradox among European regional markets. On the one hand it is the country with perhaps the strongest consumer awareness for better products; on the other, it is also the one EU country where the buy-to-trash model is the most widespread, and indeed ingrained in the national lifestyle.

In terms of awareness, over half of consumers feel familiar with organic (54%), fair trade (55.8%) and recycling issues (56.6%) [GEF, 2012]. The terms 'carbon footprint' (40.7%), 'climate change' (47.8%) and 'sustainable' (46%) are familiar to less than half. The terms which were least known are 'hazardous chemicals' with just 37.2% being very familiar with it, 'wastewater pollution' with 29.2% and 'permaculture' with only 15.9%.

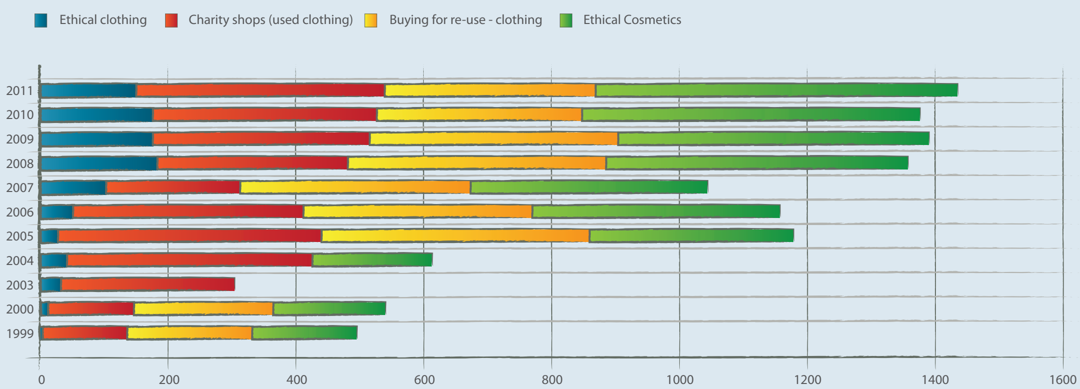
This level of knowledge contrasts strikingly with the fact that British consumers are less likely than others to avoid environmentally harmful products (27% vs. a global average of 42%), and purchase environmentally friendly products (26% vs. 39%) [NG, 2012].

In the UK, sales of organic textiles rose in 2010 by 7.8% (90% of which was organic cotton), driven by the sales of a very low number of brands such as Marks & Spencer, Nike and GAP, all of whom use organic cotton in their production [SA, 2011].

Ethically-sourced products (food and non-food) in the UK reached €50.76 billion in 2011 with a year-on-year increase between 2007 and 2011, with mar-

Illustration 24:

Total UK retail sales of ethical clothing and personal apparel products 1999 – 2011 (in GBP £) [Coop, 2012]. Data consolidated and illustrated by texSture.



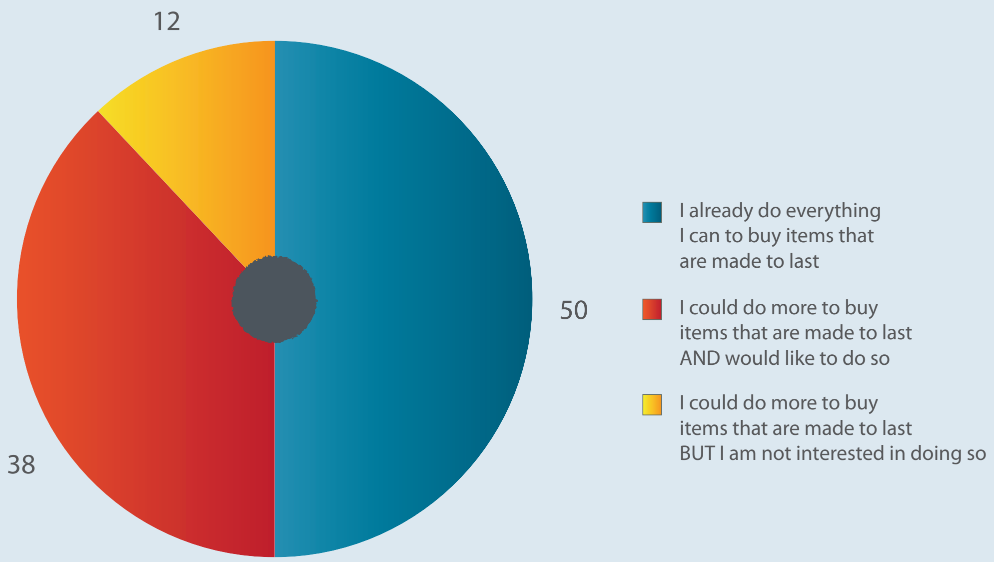
ket value rising by 39.2% during this 5-year period [KN, 2012]. Sales are forecast to increase by 40% between 2012 and 2016. The primary drivers of market growth will be innovations and the introduction of ethical products into the mainstream retail market. The market is expected to reach a total value of £76.7 billion in 2016 across all product types and customer segments.

The sales of better products among apparel have been constantly rising since the beginning of the targeted consumer surveys ([Coop, 2012]; Illustration 24). Importantly, these sales had only a negligible dip in volume during the 2008/9 financial crises, and have since been complemented by an increasingly important secondhand clothing market; sales by charity shops [Ward, 2012] in the 2011/2 period have increased by 34% over the previous year, reaching £1 billion.

The majority of consumers are aware that they vote with their money. 50% of consumers indeed use this consciously and opt to buy 'made to last' above all. A further 38% is motivated to buy better, and only a mere 12% is not interested in using their money to push brands to change their business behaviour at all ([IM, 2011, as cited in [WRAP, 2012]]; Illustration 25).

Illustration 25:

Question: 'Which of the following best describes your view about buying clothes that are made to last and look good for longer?' [IM, 2011, as cited in [WRAP, 2012]]

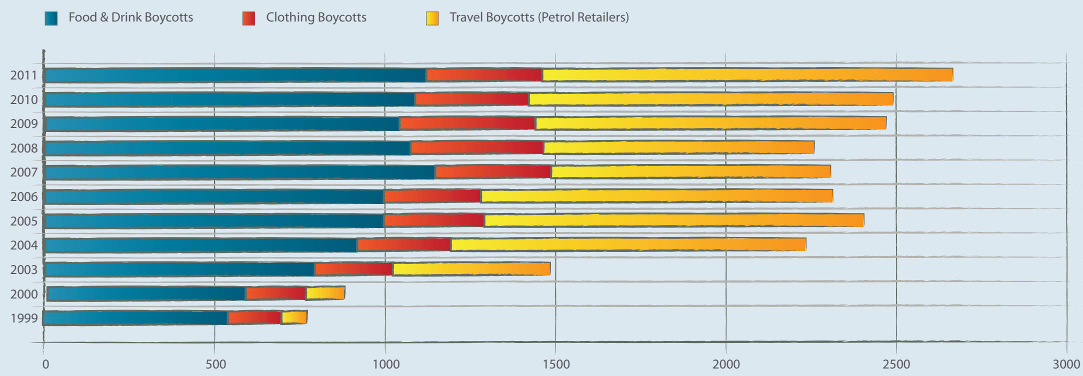


This development is also reflected in the number of consumer boycotts taking place since 1999 [Coop, 2012]. Illustration 26 shows that consumers are increasingly willing to boycott brands and companies due to their non-compliant behaviour. Developments in the political and economic landscape – such as the 2008/9 financial crises and the repeated banking scandals since – seem to have heightened consumers willingness to boycott specific brands, and therefore have impacted directly on the total number of registered boycotts. The total value lost to boycotts – travel, clothing and food – has in 2011 exceeded the £2.5 billion mark for the first time.

The Netherlands

Many Dutch consumers believe that sustainable products should last long periods of time and should have a low impact on the environment ([Erich et al., 2010]; Table 6). Similarly to other European countries, the Dutch feel that it is predominantly a responsibility of business to ensure products are

Illustration 26: Lost sales as a consequence of ethical boycotts in the UK [Coop, 2012]. Data consolidated and illustrated by texSture.



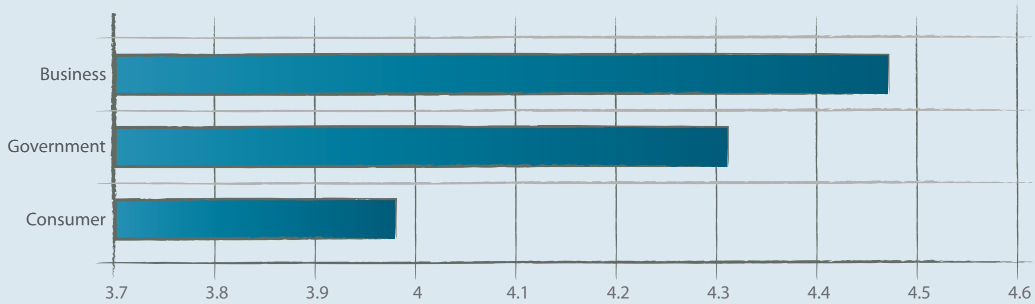
Percentage [%] / [years of age]	18 22	30 39	40 49	50 64	> 65	Total
Awareness of environmental / energy / nature / recycling	50	45	36	36	33	40
Something that will last long / decent / good quality	39	42	54	54	56	49
Do not know / other	11	13	10	10	11	11

Table 6: Consumer and the concept of sustainability. Research question: Can you briefly describe what you mean by sustainability? [Erich et al., 2010]

sustainable. However, contrary to Scandinavian consumers, the Dutch believe that governments and consumers themselves also have a role to play ([Erich et al., 2010]; Illustration 27). This aligns with the fact that the Dutch government was possibly globally the first to introduce the concept of "ecologically adjusted behaviour" as early as 1972 [Martens, 2005].

Illustration 27:

Consumer perception of responsibility. Question: 'To what extent are these parties responsible for sustainability?' (Scale: 1 = lowest; not responsible at all; 5 = highest; first and foremost responsible) [Erich et al. 2010]



3. Conclusions

In this report we show that, contrary to conventional knowledge and prior research, the majority of consumers do not base their purchasing decisions on premeditated ethical intent; decisions are instead made as a result of specific needs as well as the variety of choices related to the range of products available.

Generally, consumers are neither purposely ethical nor unethical. However, given choice, sufficient information and comparable price/quality ratios of products, the consumers often prefer the most ethical product over all the products available to them.

Convenience therefore, remains a key factor in the equation. There is only so much time and effort that consumers are willing – and able – to spend. Consequently there is a need to sensibilise grocery store chains and department stores of all sizes regarding both, their own business opportunities which remain yet unrealised, as well as their responsibility to meet consumer demand. In the UK, the popularity and wide consumer acceptance of Fairtrade certified products was originally promoted mostly by independent stores. However, it was in fact the introduction of private label Fairtrade brands at large grocery stores which triggered important sales growth in Fairtrade-certified products.

Importantly, this tendency grew even stronger during the economic recession from 2008 onwards. At the time when better products carrying certifications experienced record sales, consumers return, to some extent, to their own roots. Buying better for most consumers means to bring their focus back to the local, or at least national economy. As an immediate consequence, better consumption is now linked, as strongly with a trend towards buying locally and nationally produced goods and commodities, as was last seen in the 1960s.

On a wider scale, this most recent development will still require to find both its place as well as its justification. Buying locally does not necessarily imply ethical superiority, or even social and environmental responsibility. It is inevitable, therefore, that the label 'Made in [your country]' will encounter as many new challenges as opportunities, both of which we believe will ultimately strengthen it.

In the remainder of this conclusion the data supporting the above made statements is summarised and discussed in further detail.

3.1 Product quality vs. Price

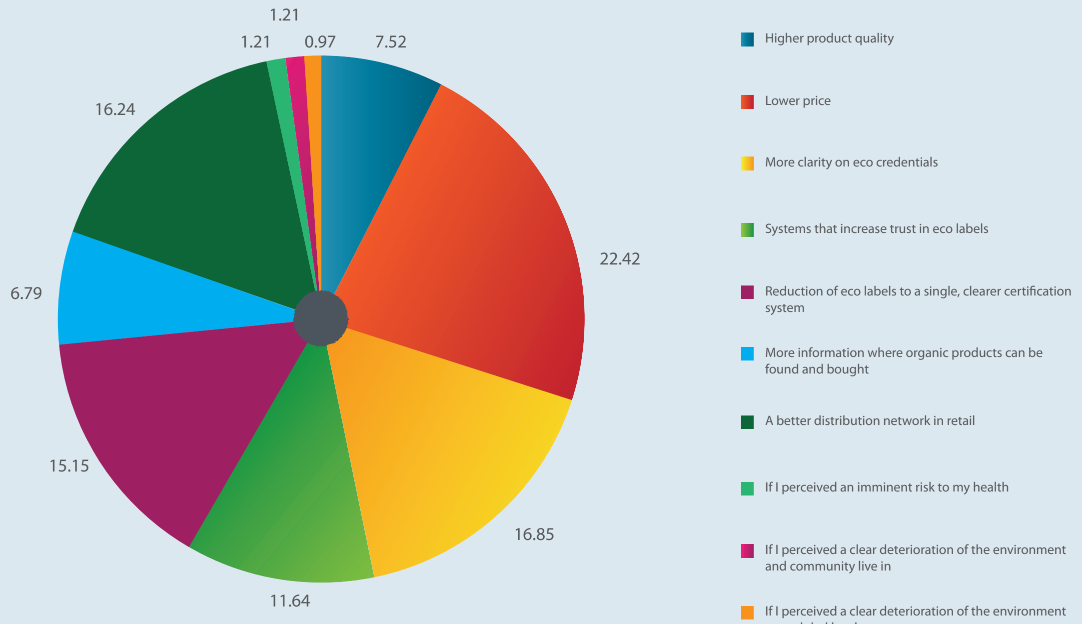
Consumers purchase products, notably fashion products, primarily according to the following four dimensions: Quality, price, colour, and design. Only after these four aspects that attributes such as health, the environment and fair trade play a role [Håvik Austgulen, 2013] in purchasing decisions. Negative stereotypes are perhaps the primary problems which responsibly produced products , of any kind, have to tackle in terms of consumer reputation. Even today, many consumers are worried that these products are either expensive, or are not of suitable quality (design, effectiveness), and often both. The lack of clarity with regards to their better credentials certainly does not help this issue either.

The following examples apply in their specifics to Italy. However, they are also valid as a general trend across the rest of the European region:

For approximately one third of consumers, either better quality or a lower price (the latter possibly suggesting a lack of quality) would encourage them to buy better products more often ([AV, 2012]; Illustration 28). Similarly, a purchasing decision between two products of equal price and quality would be influenced through credentials such as reduced packaging and the genuine effort of a brand to do business responsibly. Whether or not a product is 'Made in Italy' is of far less importance (Illustration 20, page 20).

Illustration 28:

Question: 'Which of the following characteristics would increase the chance of you buying ecologically responsible products?' [AV, 2012]



We have found that 60% of French consumers would be more easily persuaded to buy better products if they had concrete proof of their better quality. 54% were unsure as to the quality of sustainable products. Interestingly, 61% of consumers believe that that these products are not as easily and quickly repaired as their conventional equivalents. [Pastore-Reiss, 2012].

In the case of fashion, the range of reasons for non-purchase, specifically by the 37% of individuals aware of the better fashion offer of brands, is interesting. Availability remains an issue (see also page 22 below), although prices were identified as an equally important issue (judged too high for the specific offer), as well as the lack of reliable information, and finally, the style of clothing, which is not considered sufficiently fashionable (this last reason was the most common among young people) [Pastore-Reiss, 2011].

3.2 Convenience is key: Better consumers want to buy on the high street

Research has confirmed that between 25% (UK) and 51% (Sweden) of consumers hold the opinion that they would buy eco-labelled clothing more often if it were more easily available for purchase. This indicates that availability is a serious challenge for the success of eco-labels [Håvik Austgulen, 2013].

Hence, where do people buy, or aim to buy, better products? The answer is again identical across countries. It seems that, aligning with the demands of our time and age, convenience and pragmatism are the main considerations.

Consumers want to buy close by to where the majority of their shopping is done. This fact applies as much to groceries as to clothing, and is one of the main reasons behind the global growth of clothing sales in supermarkets (+8% between 2006 and 2010; [Euromonitor, 2012].

In Italy more than 25% of consumers purchase their eco products in department stores. This is followed by approximately 20% of consumers preferring to buy from specialist retailers (Illustration 29). The same research also clearly illustrateed the importance of department stores and supermarkets for the distribution of better products: 2/3 of respondents said they bought their products regularly or often in department stores, a total of 35% doing so often. It is clear that specialised shops and markets cannot compete for the convenience of supermarkets despite holding the second highest percentage of consumers preferring to purchase from them.

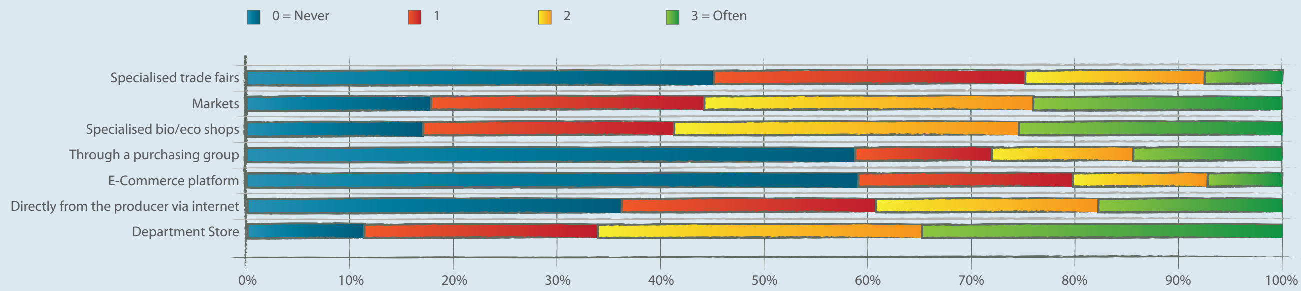


Illustration 29: Question: 'Where do you mainly buy environmental friendly products?' [AV, 2012].

This is a view shared by French consumers where 80% believe that department stores and supermarkets have a role to play to inform consumers about the better products they offer in store [Pastore-Reiss, 2011]. 25% also say that they would buy more of these products if they were displayed more prominently among the product ranges in supermarkets.

This picture translates also to the apparel domain: 36% of consumers purchase their better garments at hypermarkets, and 30% at apparel chain stores. Less than 12% ('others') buy in independent or specialised boutiques ([IFM, 2010]; Illustration 30).

Of those that buy in specialised 'ethical' boutiques, however, less than half (49%) believe the claims made by the shops (Table 7) and remain very critical with regards to claimed credentials. It is clear, therefore, that suspicion about greenwashing is widely spread.

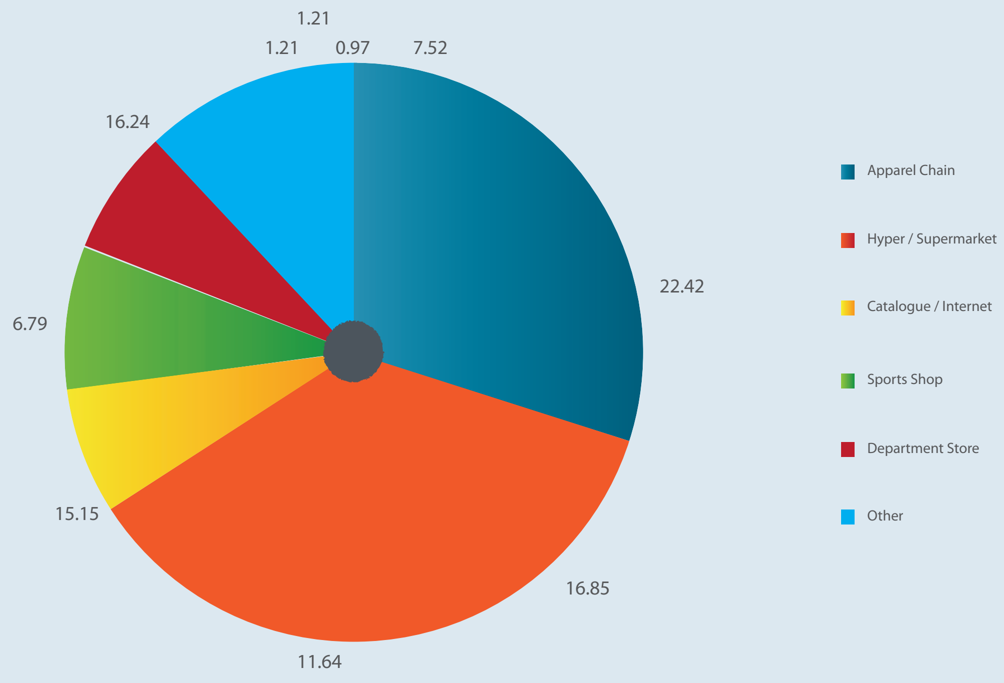
As a result of the recorded sales increase of Fairtrade products (pp. 7) and the continued growth of ethi-

Type of store	% of full confidence
Specialised 'ethical' boutiques	49%
Independent fashion boutiques	29%
Chain stores	26%
Department stores	18%
Internet	5%

Table 7: Question: 'What kind of store do you have most confidence in at the time of buying an 'ethical' garment?' [IFM, 2010]

Illustration 30:

Where do consumers buy better fashion in France, [IFM, 2010]



cal products even during the recession also in the UK, it can be assumed that the major supermarket chains account for a substantial proportion of the increased sales [Coop, 2012:2]. Over the last few years many grocery chains have indeed integrated certified Fairtrade or organic products under their own private label within their product range. This has also happened more recently in the apparel area, where all major chains now carry selective organic or fair trade ranges.

3.3 Product and certification labels may be worth their money

To consume better, consumers rely first and foremost on what holds their trust: product certifications and accreditation labels. Globally, 75% of expert consumers make their decisions based on independently verified sustainability labels [SAGC, 2011]. Approximately 80% of consumers state that labelling helps them make better choices when shopping [Håvik Austgulen, 2013].

This percentage is consistent across all markets where data is available, as can be seen in the overview provided in this chapter.

Information from trusted third parties is sought, but is of significantly lesser importance. However, it has also been shown that the level of knowledge about a specific label and certification correlates with the level of trust consumers have in a specific label. In other words, those that know a specific label well, tend to trust it more than those whose knowledge about it is limited.

Indeed, research has shown that consumers are much more familiar with the national labels than the global labels like GOTS or the EU-flower (possibly due to the relatively young age of global labels), and with labels of broader scope such as Fairtrade, rather than with those exclusively used on textiles such as Oeko-tex ([Håvik Austgulen, 2013]; Table 8).

How many of the following eco labels do you know?: EU Ecolabel, GOTS, Fairtrade, Oeko-Tex 100	Germany	UK	France	Norway	Sweden
None (0)	4.7	3.2	10.7	8.0	5.2
One (1)	7.2	17.5	12.6	20.3	13.7
Two (2)	11.9	12.7	16.9	21.6	17.2
Three (3)	22.6	20.3	20.1	23.2	23.6
Four (4)	53.7	46.3	39.6	26.8	40.3
Total Number of survey participants	1045	1039	1028	1003	1089

Table 8: Variation in awareness about global labels across five European countries, at the example of the EU Ecolabel, GOTS, Fairtrade and Oeko-Tex 100 [Håvik Austgulen, 2013].

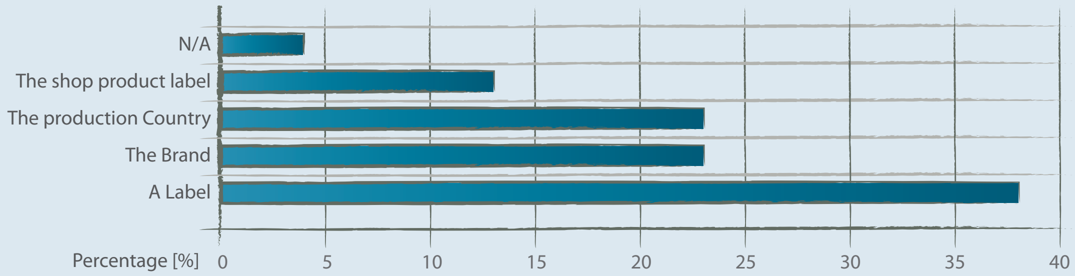
For labelling organisations and retailers this means, that consumer information and education is absolutely key. Specifically for fashion, but valid also on a general level, the label jungle is a major hurdle and challenge, especially considering the extent to which consumers rely on labels to justify and make their choices. This situation does not help to improve trust in sustainable products, and certainly does not support consumers in their purchasing decisions.

France

75% of French consumers trust products that carry a social or environmental label or certification. This is also the case for fashion, where 38% rely on a label ([Pastore-Reiss, 2011; IFM, 2009]; Illustration 31). However, 61% of consumers think that there are too many existing labels, and 56% believe that it is too difficult to really understand the details of labels, their certifications and what they really mean [Nargeot, 2011].

Illustration 31:

Question: 'What is the best way to guarantee the 'responsible' character of a garment?' [IFM, 2009]



Germany

In Germany, 61% of consumers orient themselves around independent labels such as the EU Ecolabel or the Fairtrade label when buying a product. Another 41% relies on producer information provided through avenues such as product packaging or company websites ([Ranalli, 2009]; Table 8). Yet, 83% of consumers state they would also like product labels, specifically on garments, to inform them about the better credentials of the product in question, as well as those of the company [2hm, 2012].

From where do you obtain information about the sustainability of a product?	
Independent labels (e.g. EU Ecolabel, Fairtrade)	61%
Producer information (e.g. packaging, homepage)	41%
TV reports	38%
Newspaper article	37.4
Internet (Blogs, online fora, search engine)	26.7%
Exchange with / word of mouth from friends	23.9%
Specialist advice in shop	22.6%
Associations	16.3%
Advertisement	11.7%
Other	5.1%
I'm not interested in sustainability	11%

Table 9: Question: 'From where do you mostly obtain information about the sustainability of a product?' As quoted in [Ranalli, 2009]

Italy

Italian consumers first and foremost rely on product labels to assess how environmentally friendly or unfriendly a product may be, followed by trusted third party information such as websites and independent blogs ([AV, 2012]; Illustration 32).

Italy is a typical case in which the familiarity and knowledge of a product label or certification is directly correlated with the trust in that label. As a consequence, the importance of the label or certification for a consumer's purchasing decision is high.

This relation is evident when comparing the following survey results for the organic food label, with the results of GOTS from the same survey (Illustration 33, Illustration 34). In the case of the organic food label, 82% of consumers know it well or fairly well. 73% percent have high or fairly high trust in it, and 22.4% say it directly influences their purchasing decisions. In contrast, only 6% of consumers say they know GOTS well or fairly well, 19% trust the label, and only 2.3% of consumers are are influenced by the GOTS label.

Illustration 32:

Question: 'To collect information on a product's environmental credentials, you rely mostly on ...?' [AV, 2012]. Illustrated by texSture.

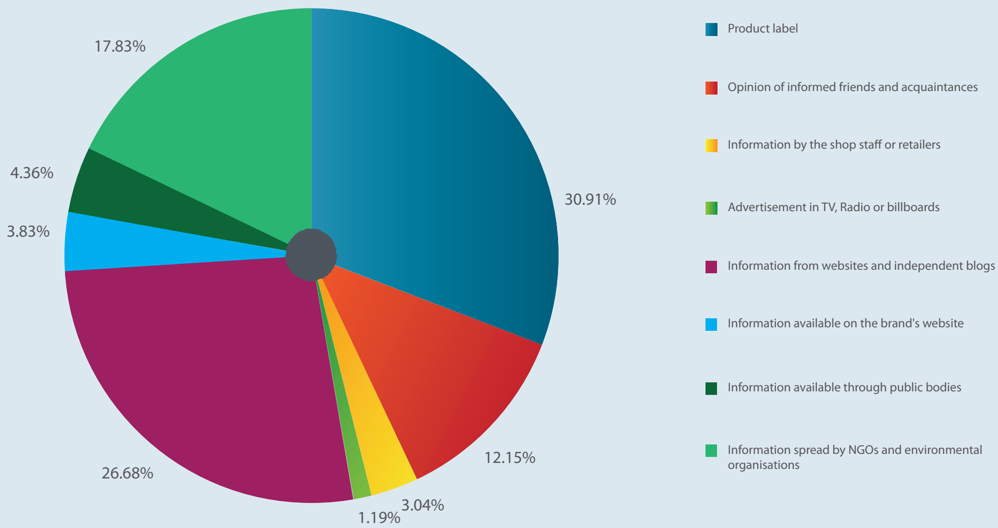


Illustration 33:

Question: 'Indicate the degree of knowledge you have about the following environmental labels and certifications.' [AV, 2012]. Illustrated by texSture.

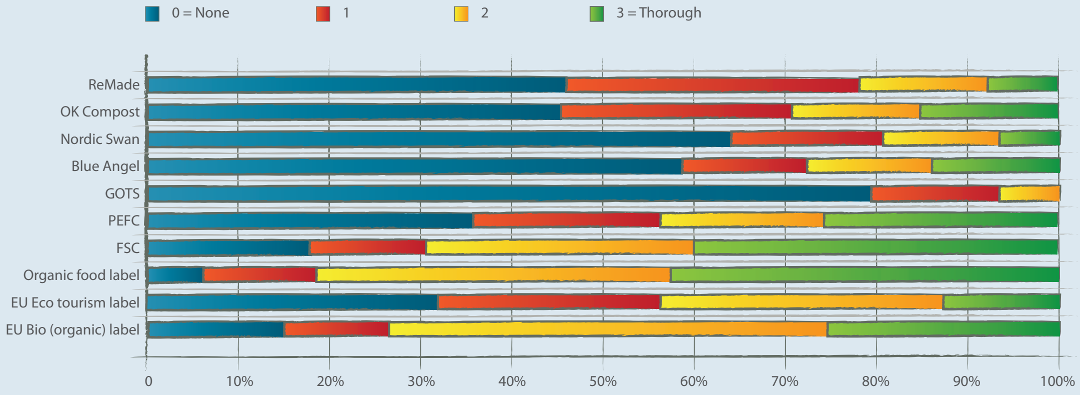
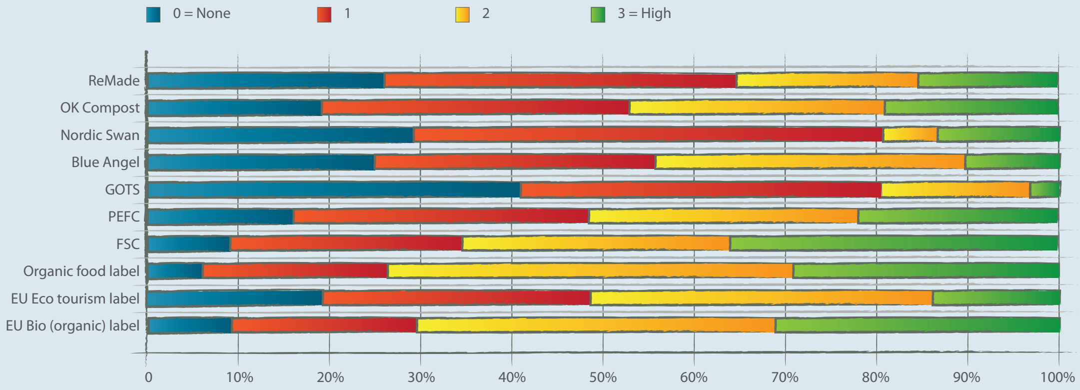


Illustration 34:

Question: 'Indicate the degree of trust you have in the following environmental certification and labels.' [AV, 2012]. Illustrated by texSture.



United Kingdom

A similar situation to Italy is evident in the UK ([Fletcher et al., 2011]; Illustration 35, Illustration 36, Illustration 37). For example, over 60% of consumers are familiar with the FSC (Forest Stewardship Council) label: over 40% have a considerable grasp of its meaning, and nearly 15% use it in their purchasing decisions. However, only just over 25% are familiar with the EU Ecolabel, approximately 5% have a reasonably good understanding of its meaning, and less than 10% of consumers consider it when buying products.

Illustration 35:

Question: 'To what extent, if at all, are you familiar with the following labels?' [Fletcher et al., 2011]

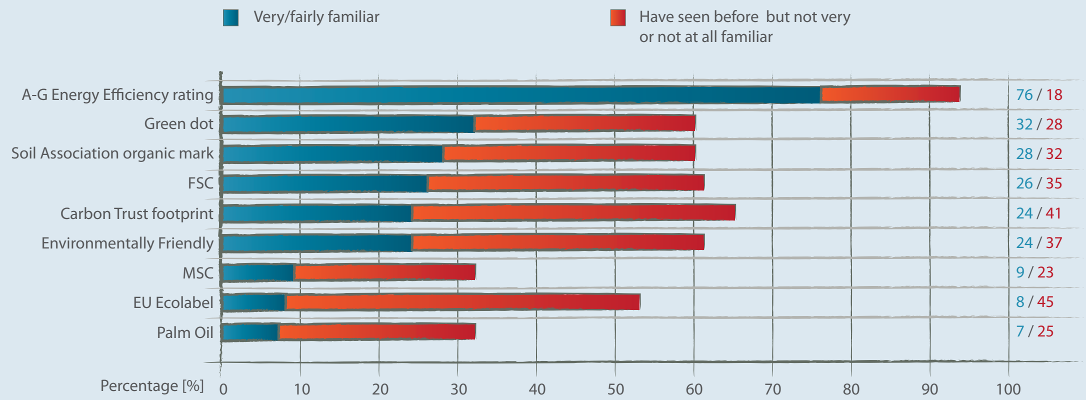


Illustration 36:

Question: 'What do you understand each of these labels to mean?' [Fletcher et al., 2011]

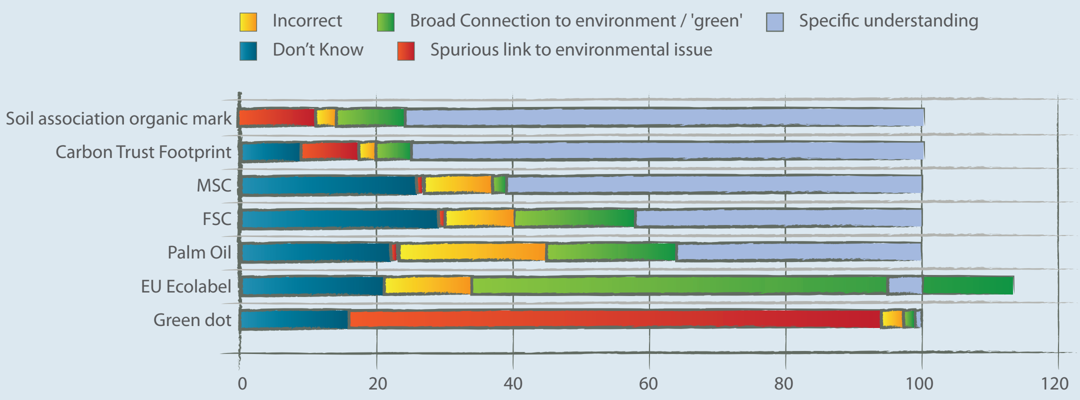
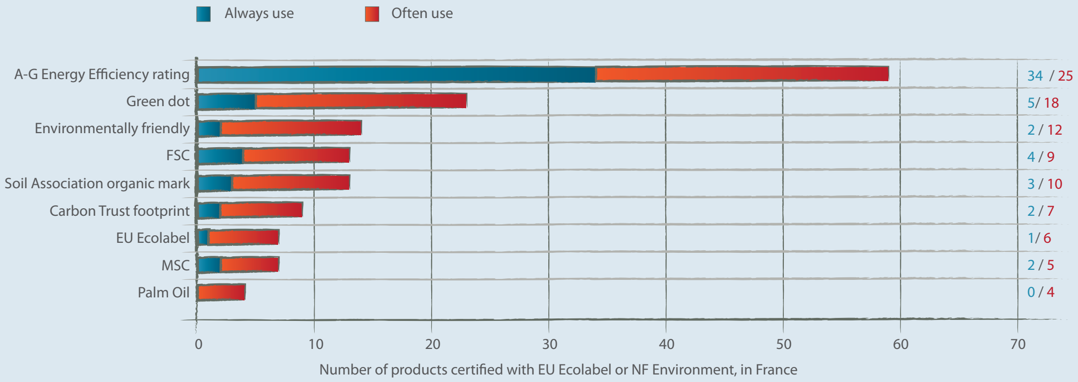


Illustration 37:

Question: 'When you are considering which products to buy, how often do you use these labels when they appear on product packaging?' [Fletcher et al., 2011]



3.4. Consumers buy locally in order to buy better

Over the course of the last decade, consumers as well as the wider industry have become aware that because of the movement mainly towards Far Eastern locations, supply chains have become longer, and their environmental and social footprint has increased. Simultaneously, local skills and jobs have disappeared. It is a somewhat more recent trend that these insights reflect in consumer attitudes and purchase decisions across all European markets. Buying responsibly is increasingly associated (again) with buying locally and nationally.

For instance, the majority of French consumers (51%) assume that products made locally allow them to consume responsibly. This is for two reasons: a) because it favours local employment (28%) and b) because shorter means of transport reduce the product's carbon footprint (23%) [Pastore-Reiss, 2011].

This result is supported by research specifically into the consumers' opinions with regards to garments where 69% consider 'Made in France', or at least 'Made in the EU' to be an indicator of better production ([IFM, 2009]; Table10).

A better produced garment is produced in France or at least Europe	2008	2009	Total 2009
Agree completely	29%	30%	69%
Mainly agree	38%	39%	
Mainly disagree	16%	14%	31%
Don't agree at all	16%	16%	
Don't know	2%	1%	

Table 10: Percentage of consumers that sees responsible garments as sourced only from France or Europe. [IFM, 2009]

In Italy, the reason for buying 'Made in Italy' products is considered by 41% to be the practise of better purchase patterns as it supports the national economy. This is also because they consider the quality superior to products made abroad (31%) [AV, 2012]. This reiterates trends reported elsewhere where 'Made in Italy' is strongly associated with attributes such as craftsmanship, furthering of traditions, and lasting enduring products. These products therefore also hold environmental as well as social credentials which Italians are proud to be associated with [Ricchetti et al., 2011]. The fact that this also implies a shorter supply chain and way to market, is of relevance only to 19% of consumers.

The consumer mood in the UK reflects the same trend: 55% of consumers state that their motivating factor in a 'buy British' purchasing decision is the desire to support UK jobs. It has also been found that consumers can be averse to buying imported products for ethical, health, and quality reasons. The researchers of one survey reported that they "had feedback from consumers that if they knew a product was made in China they would be concerned about buying it due to associated human rights concerns and even concerns over the types of chemicals used in the manufacturing process" [Gray, 2013].

4. Forecast

The overall developments depicted by the available data indicate that in the future the consumer as an individual, and neither products nor entire consumer market segments, will move further towards the centre of gravity of any type of commercial offer. Bearing this in mind, the following trends may become either more distinct and mainstream, or alternatively trigger fresh approaches in the retail and product landscape. Importantly though: The development is likely to take a different pathway in the old consumer countries in Europe than in the new and upraising consumer countries such as the BRIC states:

4.1. Global consumption landscape

Further expansion in legislation with either global jurisdictional reach or with a global practical impact; this will directly influence the retail environment either through increased prices or information dissemination.

Already extant examples of such legislation are: California Transparency in Supply Chain Act (USA); Grenelle II Law for carbon footprinting of products (France), or the British Anti-bribary Law.

It can be expected that environmental and social externalities, e.g. waste, usage of natural resources, job losses, working conditions, are required to be accounted for by corporations through similar far-reaching legislation. This again may impact consumer prices as well as the amount and type of information that consumers will eventually require in order to compare products.

Research suggests that this shift will eventually trigger a more value-based purchasing approach amongst consumers: "consumers who are given more information about the nature and breadth of social features will be more likely to make decisions based on ethical considerations. Specifically, we expect the negativity effect to be stronger when consumers are more thoroughly informed about the nature of social features, which should then increase the importance of social features in the purchase decision. Moreover, the additional information may also increase the salience of the social features, providing a similar impact on purchase decision" [Auger et al., 2008].

Optimisation of available consumer resources: Close loop sharing economy.

The new patterns of consumption capitalise on resource optimisation from consumers. Buy-to-own is not always a necessary precondition for access to, or use of a product, object or even service. Thanks to the easy availability of digital technology and processing power, offer-to-demand matching can also be made easy.

This development reduces not only the need for capital investment by consumers, but also increases the performance demand on such products. Whilst in the past, services of this type were primarily community driven, it can be expected that its continued development and global reach will be driven by corporations reinventing their current business models.

Consumer driven product design, consumer co-design

Furthermore, consumers and product developers will collaborate more commonly. Increasing numbers of designs may be crowdsourced (as is already evident), and consumers will as a result help companies to design beyond the cradle-to-gate threshold. This will also be the case for added value services of product-driven companies such as takeback schemes (which are the first steps for the recovery of valuable, highly technological resources), as well as 'buy for life' or 'lease not buy' schemes.

4.2. Old consumer countries (e.g. US, EU, Japan, Australia)

Shift from product-based retail to service-based retail:

In a society that remains, for the time being cash-rich but time-poor, products may become just the base of an entirely new landscape of end-consumer focused services. Personal shoppers, invented many years ago, are thereby the prototype of such services. Coincidentally, it is inevitable that the demand for value-added services will increase. Customer service quality, just like product quality previously, may become the decisive factor. Interestingly, this quality of outstanding customer service has long been known in countries such as Korea and Japan. In fact, upon careful analysis, the retail landscape in these countries already functions to a large extent on the promises of added value services and the quality it entails.

Increase in consumer faced product labels of non-food products with deep information:

Some of these label will be proprietary, whilst others will come into being by the consensus of labelling standardisation organisations. Many of these labels will include a product rating system. Their main focus however remains identical: give the consumers in-depth information about the product, which may reach beyond current practise and include more than exacting lists of (incomprehensible) ingredients, but explanation of the latter in everyday language, as well as the various processing countries the product has seen, and details about production facilities of every step.

These efforts are undertaken by brands and producers primarily in order to promote (partial) transparency as their USP against other brands. However, it may potentially lead to more straightforward product comparison abilities for consumers, and hence an easier as well as more value-driven purchase decision making process.

Polarisation of price segments: Squeezed mid segment may ultimately disappear

This polarisation directly aligns with a mid- to long-term increase of price per unit as a consequence of raw material bottlenecks, increased cost of transport, ethical and legal demands specifically with regards to corporate accountability of supply chain externalities such as waste, water, land usage etc.

The cheap price segment will remain focused around 'buy to trash' purchases, yet will undergo substantial technological innovation as a consequence of the above mentioned challenges.

The premium segment, in contrast, may capitalise on services, brand and product stories, and, importantly, product quality, longevity and sustainability. In an aging – or even aged – society, the values inherent in premium brands directly align with the demands of the most dominant consumer segment. Whilst there is little market growth to be expected, there is ample room for innovative products and services in this area.

The mid segment, which as yet is not quite 'buy to trash' but is certainly does not have the originality and uniqueness to justify higher prices, has been noticed as lacking a distinct USP. This will lead to its ultimate decline.

4.3. New consumer countries (BRIC and surrounding countries, Africa)

Roll out of transformational capacity increases, both in terms of production as well as consumption.

Similar to the development in the old consumer countries in the 1960s and 1970s, consumer demand is expected to grow substantially, as is local production for their own national markets (as opposed for overseas export). However, due to the availability of modern high-end and scientifically grounded technology, as well as lessons learned from areas such as Europe and the US, the direction of the development may be substantially different. This is particularly the case for raw materials, where a steady increase of superior raw materials originating from the recycling industry are streaming onto the market and are bought up by these countries. In new consumer countries, labour still is, overall, by far cheaper than imported materials, and relying on closed loop technologies will ultimately result as the cheapest and most economic way forward.

Global public digital media and activists are focusing on specific industrial development areas.

With the political changes in countries such as Burma, Cambodia and North Korea, low end mass manufacturing may aim to relocate to these countries which currently offer labour at a cost at the very bottom of the global ranking.

Environmental and social activists from around the globe, as well as local civil society organisations and labour unions, however, are willing to use digital media and novel technologies in order to prevent abuses to labourers such as those in Bangladesh as far as possible. Hence, citizen participation, whether as consumers or as activists, is likely to increase in the new consumer countries.

Climate change and resource scarcity will be felt and will impact productivity and price competitiveness.

The new consumer countries are disproportionally located in areas directly, and heavily affected by climate change. This may result in lost harvests, stalled production sites due to lack of either natural resources (energy, water) or raw materials (e.g. cotton and metals in particular), which again will affect the availability of goods on global markets, and therefore prices per unit.

Viewing these countries as up and coming consumers, it can be assumed that their awareness about sustainable production will be heightened beyond what is currently the case in the old consumer countries due to the effects of climate change. On a wider scale, further cultural clashes may arise as a consequence in the future.

The up and coming development, therefore highlights technology and a different approach towards globalised production and retailing landscapes, as two of the key variables. Consumers affected by climatic alterations will behave differently in their purchasing decisions. This, together with transparent communications – results of digitally networked consumers - and the distinctly different customer experiences shown will provide the most interesting challenges and opportunities, and will determine many newly arising opportunities and demands.

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Editorial Information

About this report

This report was written between December 2012 and February 2013 and is based on publicly available secondary data included in business reports, publications, and academic articles published between 2005 and 2013. The report includes an analysis of existing research on the latest key European consumer trends particularly related to sustainable consumption in fashion (or better consumption or alternative consumption). The report includes insights on consumer attitudes and behaviour towards better products and companies particularly in the following European countries and regions: France, Germany, Italy, Scandinavia, United Kingdom, and the Netherlands. The choice of the countries is dependant on the availability of research and data. The report also includes conclusions and forecasts drawn from the analysis and elaboration of existing research.

About texSture

texSture is a single port of call for the textile and fashion industry. Through expertise, practical solutions, research and training, we support good companies in making good decisions, and in this way mitigate risk and reduce uncertainty. To achieve this, we help companies look at how their stakeholders' needs change and adapt in response to cost, convenience and opportunities, as well as how these combined finally trigger important market shifts. As a result, our clients are able to identify and find solutions that address risk and uncover new market opportunities. Once the principle key questions that identify and address risk have been formulated, our consultants will lead the implementation at all levels from design, over marketing, to sourcing, manufacturing, or wet processing.

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To cite this report: Ravasio, P., Pasquinelli, I.: "The better consumer in Europe: the trends fashion companies should watch to make good decisions". TexSture Limited, March 2013.

The report is available for download from the following link: http://texSture.com/outreach/reports

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