

SUSTAINABILITY

## Honing in on sustainability, fashion shoppers' attitude-behavior gap is narrowing: Bain

October 25, 2022



*Bain & Co. has released a new report examining shifts in consumer behavior as it relates to sustainability and fashion. Image credit: Bain & Co./Getty Images*

By AMIRAH KEATON

Consumer stances toward sustainable practices are increasingly aligning with their purchasing patterns, according to a new report from Bain & Company.

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More than half of fashion buyers will purchase based on environmental impact versus a standing 15 percent, according to the firm. Penned in partnership with the World Wildlife Fund Italy (WWF), Bain & Co. has released [How Brands Can Embrace the Sustainable Fashion Opportunity](#), which examines consumer behaviors related to sustainability and fashion, shares insight as to what findings may mean for the fashion industry and reveals five sustainability personas for global fashion consumers.

"Sustainable shopping is an inevitable change," said Claudia D'Arpizio, global head of fashion & luxury at [Bain & Co.](#) and senior partner, Milan, in a statement.

"Concern for sustainability is strong among younger generations and growing overall," she said. "Hence, fashion brands need to embrace the sustainability conversation and make sustainable purchasing easier for all consumers.

"Brands that proactively design sustainability into their strategy and operations will cement their relevance and capture a windfall of unmet demand, now and into the future."

Findings arrive after a survey of nearly 5,900 fashion consumers across six countries, including China, France, Germany, Italy, Japan, the United Kingdom and the United States.

### Bain surveys sustainable fashion

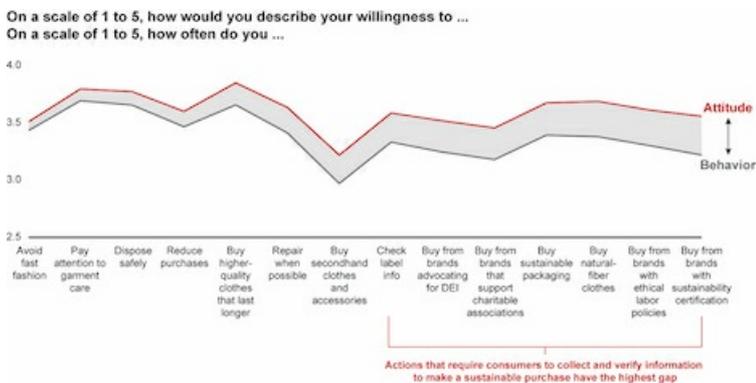
Sustainability in fashion has reached a Catch-22 of sorts while institutions await a specific set of consumer demands to appeal to, caring consumers lack the expertise to articulate their desires.

Thus, approximately 65 percent of fashion shoppers said they care about the environment, but only some regularly

prioritize sustainability in their shopping, per Bain's pool of results.

However, though 15 percent of global fashion consumers are already making consistent purchasing decisions to lower their impact out of concern, the consulting giant predicts that this percentage is likely to rise to more than 50 percent.

The difference between what fashion fans are saying and what they are doing is lessening, and this could provide an opportunity for heightened success among industry leaders.



Source: Bain analysis of global consumer survey

Bain's graph displays the discrepancy between fashion consumers' willingness to act sustainably and legitimate purchasing behavior. Image credit: Bain & Co.

To accommodate the coming change, Bain & Co. says that fashion brands will need to focus on action across three core areas brands must address the information gap, take advantage of an opportunity to leverage an existing emphasis on product quality and attempt to make sustainable purchases more convenient and appealing to combat the accompanying trio of issues.

First, lack of transparency is causing consumer confusion and deterring sustainable purchases.

One of every three Baby Boomer and Silent Generation respondents claimed that they do not know where to find sustainability information for brands or products. Conversely, one out of five Gen Z and Gen Y/Millennial respondents reported the same difficulty, though a 20 percent consumer confusion rate is arguably no more acceptable.

Brands must meet the moment, working to reverse a widening information gap by increasing transparency.

The baseline for brands is that In-store displays, labels and product descriptions should to be clear, easily available and reliable. Packaging is a great medium with which to communicate sustainability values, but this must be backed by actual practices.

Those outpacing the status quo are shining a light on their production processes, and are being upfront about supply chains and partner information and material descriptions.

Next, fashion is missing opportunities to engage consumers on product durability.

Which are, for you, the most important factors when purchasing clothing and accessories?



Source: Bain analysis of global consumer survey

Quality beats out price, fit and style as the leading purchasing factor for global fashion consumers. Image credit: Bain & Co.

Product quality is the leading purchasing factor for fashion consumers, beating out price, product fit, and style among shopper considerations.

Interestingly, fashion's attitude-behavior gap is most reduced when it comes to the proposed purchase of high-quality clothing, in comparison to many other proposed solutions that consumers are armed with, as quality and durability are more tangible and less abstract in nature. A silver lining lies therein, as durability and quality are so closely related to sustainability.

Quality also has the most impact on a product's life cycle, and can most closely extend a product's lifetime. Thus, it is crucial for fashion entities to remain actionable on this front, proving value and producing fashion that lasts, above all.

Positioning purchases as investments versus seasonal acquisitions is a solid first step. Additionally, providing background on cost-per-wear on product labels and tags is likely to increase sustainable consumption, as presenting impact alongside cost increases the likelihood that consumers opt for sustainable selects.

Finally, fashion must solve inconveniences such as limited assortments that are currently serving as strong barriers to entry for purchasing sustainably.

Consumer shopping habits remain heavily influenced by convenience, as compared to factors like social impact or public opinion.

Bain & Co. says issues like limited assortments and unclear methods of distinguishability between sustainable and non-sustainable items are among the obstacles faced by fashion consumers. The firm notes that these challenges only increase over time, and exist for multiple generations.

Simpler, more convenient options could increase inclinations to purchase sustainably.

In-store tools include zoning and dedicated space for sustainable products and displays and increased investment in and availability of sustainable styles or communication as to the reason behind sold-out SKUs, such as small batch production across the board is much needed.

Bain & Co.'s full report and research are now available for luxury players' use in the anticipation of and planning for future ESG needs. Readers can also access an interactive report presentation at a newly-constructed microsite, ready for review in Italian.

## Consumer profiles

In an effort to further illuminate gaps between consumers' attitudes and actual behaviors within specific audiences, Bain & Co.'s research resulted in the identification of five types of global fashion consumers.

The firm's research signals support for ESG action at varying levels across a wide spectrum of consumer profiles, from customers who care deeply about sustainable causes, to those who are unconcerned with ESG issues.

	Sustainability Champions	Idealists	Good Citizens	Opportunity Shoppers	Indifferents
Willingness to take sustainable action	Very willing	Usually willing	Usually willing	Sometimes willing	Low willingness
Frequency of sustainable purchases	Often or always	Hardly ever/ sometimes	Often or always	Sometimes	Never/hardly ever
Concern about sustainability	High or very high	High	Mid	Mid	Low or very low
Generation	Millennials and Gen Z	Millennials	Millennials and Gen Z	Gen X and older	Older generations
Education	Undergrad/ graduate school	Undergrad/ graduate school	Undergrad/ graduate school	Secondary school/ undergrad	Secondary school
Gross family income	€€€€	€€€	€€€	€€	€€
Annual apparel spending	€€€€	€€€	€€€	€€	€€
Pre-purchase engagement	Extensively research purchases	Gather information from social media, TV, and conferences/talks	Gather information from in-store displays, social media, and brand websites	Gather information from in-store displays and word of mouth	Do not research purchases
Consumers willing to pay a premium price for sustainable product	84%	67%	64%	55%	24%
(Average premium price %)	(+32%)	(+25%)	(+25%)	(+20%)	(+17%)

Source: Bain analysis of global consumer survey

Regarding sustainability sentiment, Bain says global fashion consumers fall into five different personas. Image credit: Bain & Co.

Overall, momentum continues to build from the bottom up (see story) as the climate crisis' increasing urgency hits younger generations.

Previous reports from Bain have supported the notion that luxury leaders must begin with strategic planning now, in order to ensure that more complex sustainability initiatives have time to yield results down the road (see story).

"One can easily see that the fashion industry is very closely linked to nature loss and degradation across its value chain, but this is also what makes it a sector that can lead in bringing about change and sustainability," said

Benedetta Flammini, marketing and communication director at WWF Italy, in a statement.

"Our planet will benefit greatly if brands take action and the fashion industry transitions from a polluting, overly-consumptive linear path to a circular one."

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