



esw.

GLOBAL
VOICES

**SUSTAINABLE
GLOBAL GROWTH**
and Apparel Shopper Expectations

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EXECUTIVE SUMMARY

The apparel industry continues to be under scrutiny for its often questionable sustainability record. And while the rise of fast fashion indicates that many consumers consider apparel to be a commodity, there is a backlash brewing. From the booming second-hand market to shoppers digging deeper to buy longer lasting, quality products, there is a growing call for brands to commit to transparent, honest sustainability practices.

But what does it mean for an apparel brand to be sustainable? What actions can brands take to meet customer demands and be environmentally responsible?

ESW surveyed more than 16,000 shoppers from 16 countries about their attitudes toward sustainable shopping and what steps apparel brands can take to earn their trust and their business.

The following report is meant to serve as a valuable source of consumer insight that helps you make data-driven decisions that are good for the bottom line and the planet.



APPAREL'S BEST CUSTOMERS DEMAND SUSTAINABILITY

More than **8 in 10** apparel shoppers **consider sustainability when making purchases**. A deeper look at the data shows that the customers brands want the most are even more environmentally conscious.



POWER SHOPPERS



CROSS-BORDER SHOPPERS



YOUNG SHOPPERS



94%

OF POWER SHOPPERS

(those *spending* >\$2,500 per year online) consider sustainability as part of their purchase decisions.



Values are percent of shoppers who responded Yes to survey questions: Do you consider sustainability when making a purchase decision. (N=4,958)

Source: Global Voices Survey conducted November 2022

GLOBAL SHOPPERS WEIGH SUSTAINABILITY WHEN BUYING APPAREL

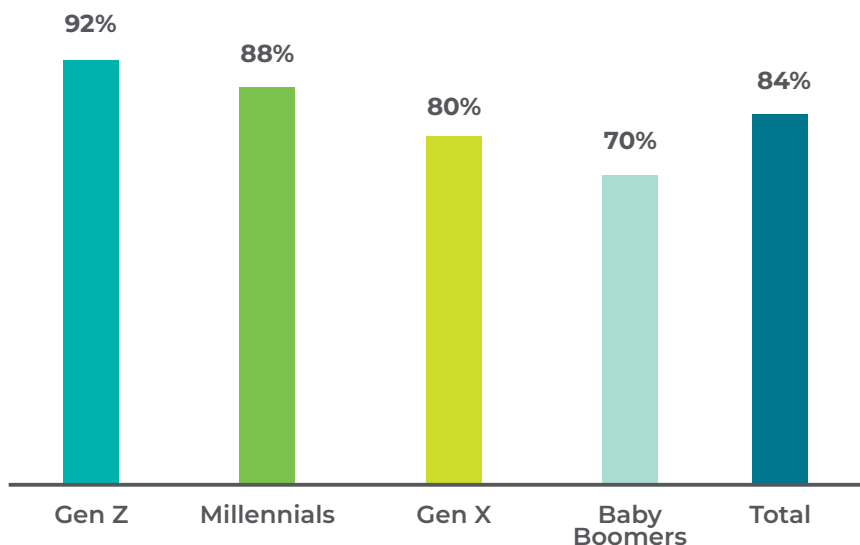
Do you consider sustainability criteria when making a purchase?



Values are percent of shoppers who responded Yes. (N=13,715)
Source: Global Voices Survey conducted November 2022

YOUNG SHOPPERS PRIORITISE SUSTAINABLE PURCHASES

Do you consider sustainability when making a purchase decision?



Values are percent of shoppers who responded Yes. Gen Z (N=2,098), Millennials (N=6,020), Gen X (N=3,317), Boomers (N=1,847)
Source: Global Voices Survey conducted November 2022



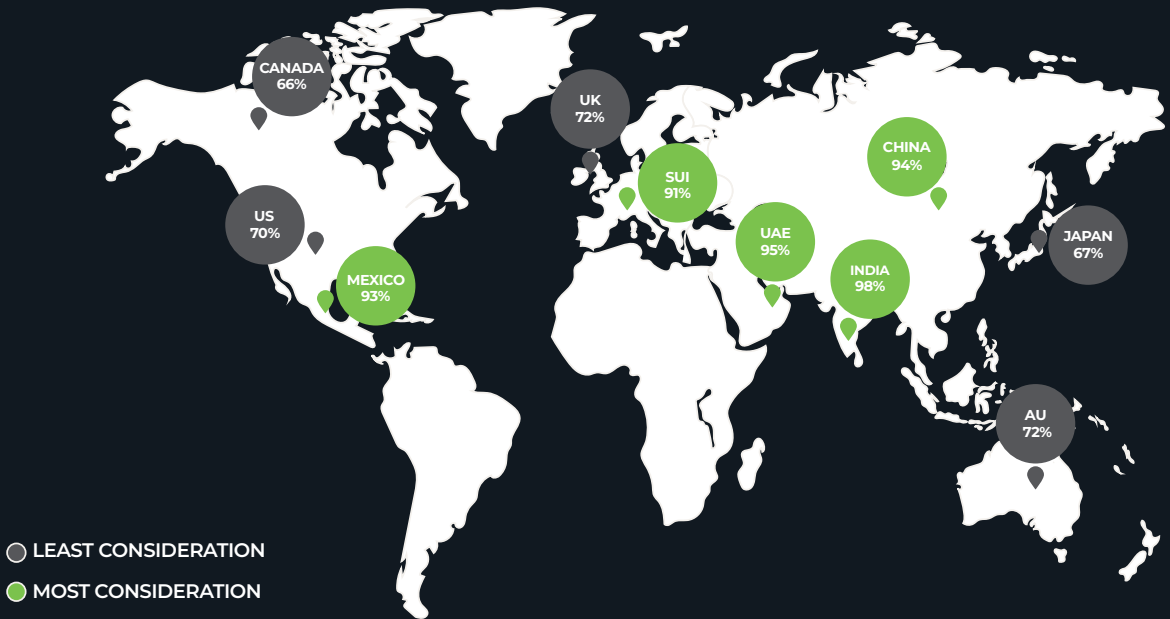
65% OF SHOPPERS
have significantly
changed shopping
behaviour to lessen
their environmental
impact

MARKETS WITH YOUNG POPULATIONS RANK HIGHEST FOR VALUING SUSTAINABILITY

Which global markets are the most sustainably minded? Apparel shoppers in countries with younger populations are more likely to consider sustainability when buying online.

MARKETS WITH YOUNG SHOPPERS ARE MOST LIKELY TO CONSIDER SUSTAINABILITY WHEN PURCHASING

When you shop online do you consider sustainability criteria in your purchase consideration?



Values are % of respondents who responded Yes. (N=625-1,000 per country)

Source: Global Voices Surveys conducted November 2022

BOTTOM LINE:

Brands entering new markets should prioritise sustainability from day one. The most valuable customers demand sustainable practices.



HOW APPAREL BRANDS CAN MEET SUSTAINABILITY EXPECTATIONS

Apparel shoppers want to buy from brands whose sustainable values align with theirs. But what do shoppers expect and what criteria do shoppers use when deciding to make a purchase?

SHOPPERS WANT APPAREL BRANDS TO BE TRANSPARENT AND ETHICAL

Consider sustainability and shopping, how strongly do you agree or disagree with the statement?



74%

I expect brands to be transparent about their environmental credentials



71%

I'm more willing to buy a product if it has a positive environmental impact



66%

I consider environmental impact (e.g. carbon emissions, dye water contamination, etc.) when shopping



67%

I would buy a product if the delivery was carbon neutral

Values are percent of consumers who Strongly Agree/Agree (N=15,875)
Source: Global Voices survey conducted November 2022

SUSTAINABLE PACKAGING AND GREEN DELIVERY DRIVE PURCHASE DECISIONS

When you shop online, do you include the following criteria in your purchase consideration?



Values are % of respondents who responded Yes to each question (N=15,875)
Source: Global Voices Survey conducted November 2023

BOTTOM LINE:
Apparel brands can demonstrate sustainable credentials by implementing incremental changes. Brands that engage partners for carbon neutral delivery and sustainable packaging satisfy consumers' sustainability demands.



SHOPPERS WILL REWARD APPAREL BRANDS THAT ARE SUSTAINABLE

Apparel shoppers want brands to be sustainable. But implementing new solutions is complicated and costly. Will shoppers respond? Do shoppers act on their beliefs and support sustainable brands? Our survey shows they do.

APPAREL SHOPPERS BUY ACCORDING TO THEIR VALUES

Consider sustainability and shopping, do you agree with the statement?



60%

I have purchased from a new brand specifically because of their sustainability practices



54%

I have stopped buying from certain brands because they lack environmental credentials



61%

I have spent more on a product because it was more sustainable



63%

I have gone out of my way to buy products in sustainable packaging

Values are percent of consumers who Strongly Agree/Agree (N=15,875)
Source: Global Voices Survey conducted November 2022

BOTTOM LINE:

Shoppers will seek out and spend more money with apparel brands that demonstrate a commitment to sustainability. Brands that engage with sustainable partners boost their own environmental credentials and win more customers.

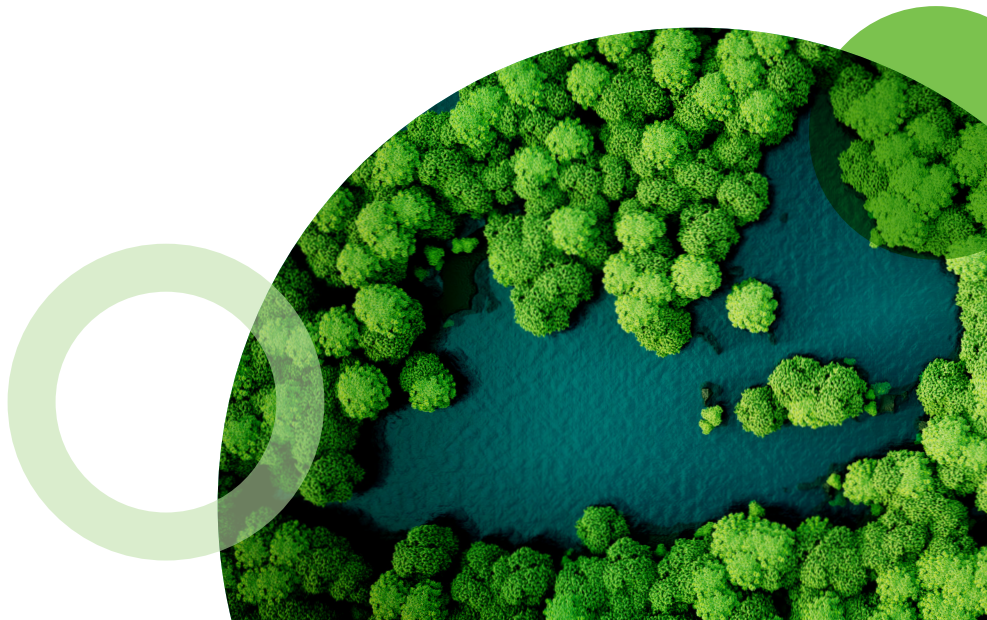
CONCLUSIONS AND RECOMMENDATIONS

When it comes to sustainability, apparel shoppers align their spending with their values. Brands that demonstrate a genuine commitment to sustainability will win and keep customers.

- + **94% of customers** who spend more than \$2,500 factor sustainability into purchase decisions
- + **54% of shoppers** have stopped buying from brands that lack environmental credentials
- + **61% of shoppers** have spent more money on a product that was sustainable

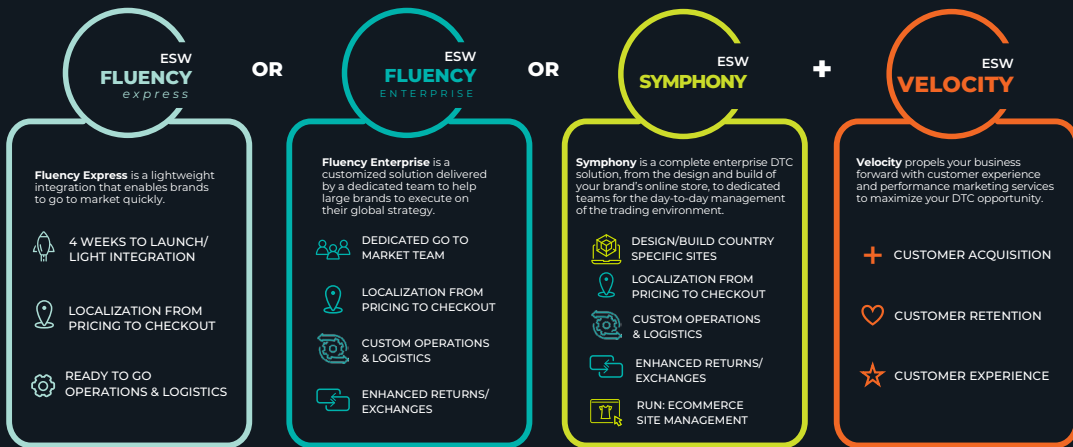
BRANDS SHOULD

- + Prioritise sustainability from day one
- + Reduce delivery footprints and increase sustainable packaging
- + Partner with sustainable vendors



ESW ENABLES GLOBAL GROWTH

ESW helps the world's best-loved brands accelerate DTC growth and meet shoppers' sustainability expectations with a suite of solutions that deliver a superior end-to-end consumer experience.



Contact us at growmybrand@esw.com or visit [esw.com](https://www.esw.com)

Methodology: ESW's latest *Global Voices* consumer survey was conducted in November 2022 in 16 countries (Canada, the United States, Mexico, the United Kingdom, Switzerland, Spain, France, Italy, Germany, South Africa, the United Arab Emirates, India, China, South Korea, Japan and Australia), with 16,557 people responding. In this report Gen Z is defined as those between 18 and 24; Millennials as those ages 25-40; Gen X as those ages 41-56; and Baby Boomers defined as those ages 57-75.