This report looks at the following areas:

- The impact of the cost of living crisis on the sustainable fashion market.
- Changes in the importance of sustainability when buying fashion and influential factors.
- Shift towards more sustainable behaviours when consuming fashion.
- Interest in ways retailers can be more transparent.
- What can drive more sustainable behaviours.

While almost seven in ten Gen Zs state that they place a high level of importance on sustainability when buying fashion, these concerns do not always feed through into their behaviours, as young women aged 16–24 are the highest intensity fashion buyers.

The cost of living crisis has played its part in helping consumers adopt more sustainable shopping behaviours, leading people to buy fewer items and shop less frequently, as well as boosting demand for resale and repairs. In many ways, these more conscientious behaviours benefit the environment as well as customers’ pockets. Women are significantly more likely than men to have bought second-hand fashion items and sold used and unworn pieces in the last 12 months, helped by a trend for thrifting and vintage.

Fashion retailers will need to prepare themselves to navigate new legislation making them accountable for the environmental impact of their supply chains and responsible for the lifecycle of their products including the waste they generate. Fashion brands can benefit from taking early action, investing in transparency and building circularity into their business models.

Given that over half of consumers have recycled fashion items in the last 12 months or plan to do so, improving recycling infrastructure in the UK presents a big opportunity. Several major fashion players including Inditex, H&M and Zalando have invested in innovative garment recycling partnerships in 2023.

“The cost of living crisis has played its part in helping consumers adopt more sustainable shopping behaviours, leading people to buy fewer items and shop less frequently, as well as boosting demand for resale and repairs. However, more radical changes will be required to reduce fashion’s environmental footprint.”

– Tamara Sender Ceron, Associate Director – Fashion Retail

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