

(SUSTAINABLE)
**FASHION
CONSUMPTION
IN AUSTRIA:**

a high level of awareness,
but potential to do more

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A study conducted by

GREENPEACE



WIEN

GERECHTIGKEIT MUSS SEIN

SUMMARY OF RESULTS

In a representative online survey on clothes consumption, commissioned by Greenpeace and the Vienna Chamber of Labour, the INTEGRAL Institute asked 1,506 Austrians about their clothing consumption and their attitudes towards it.

Charts (starting with p. 6 in this document, selection)

All charts can be downloaded here (German version): <https://wien.arbeiterkammer.at/modekonsum>

The long version of the Study (only German) can be downloaded here:

<https://emedien.arbeiterkammer.at/viewer/resolver?&urn=urn:nbn:at:at-akw:g-5834466>

GENERAL RESULTS

- Those surveyed said they spend an average of €800 on clothes per year.
- On average, respondents say they own 100 items of clothing.
- Around 25% of the clothing is only worn occasionally, 15% very rarely and 12% is never worn. The people surveyed wear half of their clothes regularly. This means that around 185 million items of clothing hang virtually unworn in wardrobes in Austria.
- Four fifths of those surveyed agreed with the statements that the overproduction of clothes takes a huge toll on the environment (86%) and that fast fashion is a serious problem (81%).
- On the other hand, around two thirds of respondents said they haven't bought second-hand or used exchange platforms in the last 12 months.
- 33% of those surveyed said they had thrown away clothes in the last 12 months. 52% had taken clothing to a clothes bank.
- 43% of those surveyed stated that they were willing in principle to buy longer-lasting products even if these were more expensive; 30% already do so.
- There is a high level of support for legal regulations: 91% are in favour of a supply chain law and 86% support a ban on destroying new goods.
- The lifespan is shortest for shoes (2.9 years), while jackets and coats are worn longest (an average of 4.8 years). The lifespan has slightly decreased in recent years. In a Greenpeace survey in 2019, 11% of respondents said they got rid of shoes after a year at most. The figure in the current survey was 14%. The situation is similar for trousers, which were worn by around 8% of respondents for no longer than one year in 2019; this figure is now 12%.
- When asked about the most important buying criteria, most of those surveyed said that functionality (92%) and high quality and finish (85%) are very or fairly important to them. Nonetheless, a low price is also a very or fairly important factor in purchasing decisions for 78%, while far fewer respondents cited high environmental standards (44%) or social standards (40%). Compared to the 2019 survey, however, quality marks and environmental standards have become more important.
- When asked about their main sources of clothes, half of those surveyed named branches of large fashion chains such as H&M or Zara (49%) as well as catalogues from large retailers or online shops such as Amazon or Shein (48%). Half of online buyers said they shop online for convenience.

- On average, respondents said they had bought 18 items of clothing within the last year, which is significantly lower than the 50-60 items of clothing per person per year reported by trade balances or Statista.¹
- Almost all of those surveyed agreed that people buy too many clothes (92%).
- 40% of respondents said they currently buy less clothing than before due to the increased cost of living.
- The urgent need to extend the lifespan of products and reduce overall consumption is also reflected in respondents' support for repairable or recyclable clothing (83%), government subsidies for repairs (79%) and minimum legal requirements for the durability of clothing (66%).

The results of the survey reveal a significant dissonance between people's high level of awareness of the issues and their actions. In principle, there is high demand among those surveyed for functional and long-lasting clothing. In reality, however, it is often price or convenience that drives purchasing decisions, and the social and ecological impact plays only a minor role. Minimum legal standards, restrictions on fast fashion and government subsidies for alternative consumption options meet with broad approval among those surveyed.

RESULTS FOR SPECIFIC TARGET GROUPS: YOUNG ADULTS

Young adults (aged 16-29) exhibit different behaviours in various aspects compared to the average consumer or to older age groups:

- The number of items of clothing purchased within the last year is significantly higher than average among young people (27 vs 18 items). At the same time, however, young people buy far more second-hand clothing (both online and offline – about 50% each); clothes swap parties are also popular in this age category.
- Young people are also far more likely than other age groups to order online. Moreover, young consumers return items more frequently, partly because they order several sizes and generally purchase more.
- The average lifespan of clothes is noticeably shorter among young people compared with the average consumer; for jackets/coats in particular, it is only 3.3 years (Ø 4.8 years; middle and older age groups: 5.2 years), for pyjamas 2.8 years (Ø 4.4 years; older age groups: 5.0 years) and for short-sleeve tops 2.2 years (Ø 3.4 years; middle and older age groups: 3.7 years).
- While worn-out clothing is also the main reason why young people get rid of items, the proportion (57%) is significantly lower than average (75%). One young person in five gets rid of items that are no longer in style, compared with one in ten among older consumers.
- Young people are less active than older age groups when it comes to repairing items (38% vs 60%), but they are more likely to share clothes with others, a practice that is virtually non-existent among older people (young people: 37%, older respondents: 3%).
- Attitudes: according to young people, fashion is an important way of expressing their personality (younger respondents: 66% vs older respondents: 45%) and a sign of success (59% vs 46%), which means that new fashion trends are also important to them (30% vs 6%).

¹ <https://de.statista.com/outlook/cmo/bekleidung/oesterreich>; <https://www.global2000.at/alte-textilien>; evaluation of the STATcube trade balance for shoes and clothing in Austria (by tonnes) also gives a result of 50 items per head.

- Young people have a slightly more positive view and think that sustainability in the textile sector is on the right track: clothes banks do good (68% young vs 57% older consumers); recycling works well (49% vs 37%); the fashion industry does a lot for sustainability (49% vs 23%).
- Young consumers in particular are buying less due to the increased cost of living.

For young people, clothing has an important emotional, experience-based and social component. It is apparent that young people are still searching for their identity. Clothes must be fashionable, and brands have comparatively high importance as well. For young people, the way in which they dress is also closely related to prestige and social success. The social aspect of clothing is important too, however, with young people more likely than other age groups to go to clothes swap parties and to pass on or lend clothing to friends. In terms of sustainability, an ambivalent picture is evident: although young people are more likely to buy second-hand clothes, they had bought far more items of clothing within the last year than other age groups, purchase more online and are more likely to return items. The lifespan of their clothes is also significantly shorter than among other consumers. With regard to sustainable development, young people are fairly upbeat and believe that a large number of positive steps have already been taken.

RESULTS: INCOME, GENDER, EDUCATION, SUSTAINABILITY

- The increased cost of living has resulted in women (46%), people who have completed only compulsory schooling (51%) and people with a low household income (43%) cutting back on their clothing purchases more than the average consumer (40%).
- Women (108 items) own significantly more of all items of clothing than men (78 items).
- However, women use all items of clothing for longer than men (e.g. tops, f: 3.7 years vs m: 3.2 years); on the other hand, they are more likely to get rid of clothes for personal reasons.
- For people with a low income, the price (83%) is the second most important factor after function.
- People with a low household income are more likely to buy second-hand or make their own clothes; however, both practices are also common among people for whom the durability of clothing is important.
- People who have completed only compulsory schooling (CS) tend to buy a lot (24 items vs 18 items on average), but spend significantly less per month on clothing than average (CS: 43 euros vs Ø: 66 euros).
- Lending clothes or sharing them with others is a more common practice among respondents with a low level of formal education than it is for the average respondent.
- People who already pay more for long-lasting clothes are more likely to want stricter legal regulations in terms of sustainable criteria. These respondents often believe that too much clothing is bought and that fast fashion is a serious problem.
- The respondents most likely to pay more for long-lasting clothes are older people, those who have a higher level of formal education and/or people with a higher household income.

With regard to sustainable aspects, there are sometimes ambivalent behaviours among these subgroups too: women own more items of clothing, but wear them for longer and are more likely to opt for a timeless style when buying clothes. In addition, women are more likely to try to repair worn-out clothes; the return rate for online purchases is higher among women, however.

On average, people with a low level of formal education spend 22 euros on an item of clothing – they buy a lot but do not pay much. The return rate for online purchases is quite high among these consumers as well, but they have cut back on their purchases within the last year due to the increased cost of living. From a sustainability perspective, one positive aspect is that this group of respondents often borrows clothes too.

For people with a low income, the price is the second most important factor when buying clothes; nevertheless, they spend more on average per item of clothing (33 euros) than people who have only completed compulsory schooling. On the other hand, they buy second-hand more often and try to sell clothes that they no longer want; interestingly enough, however, they are less likely than average to have clothes repaired.

DEMANDS FOR POLICY MEASURES

- A strong supply chain law. Manufacturers and retailers must provide transparency around all the stages in their supply chain and must be liable for human rights violations, damage to health or environmental damage in the production process. The Commission's current draft must be improved, also cover medium-sized companies and include stronger climate protection targets.
- Binding legal requirements for durability, repairability and recyclability: fast implementation and stricter binding measures of the EU Ecodesign for Sustainable Products Regulation
- Strict implementation of the EU Chemicals Directive.
- Transparency on product materials and manufacturing, for example by means of a digital product passport.
- Transparency and clear criteria for quality labels: these must fulfil more than the legal standard and must be verified independently.
- Ban on the export of textile waste outside the EU: only (old) clothes that can actually be reused as wearable clothing and that are needed in the destination country are allowed to be exported.

LIFESPAN

approx. *** years	OVER-ALL	GENDER		AGE			EDUCATION			HOUSEHOLD NET INCOME	
		Men	Women	16 to 29	30 to 59	60 to 75	Compulsory schooling	Voc. school, apprenticeship	Matriculation exam, university	Up to € 2.000	Over € 2.000
		n=750	n=752	n=333	n=849	n=324	n=339	n=704	n=462	n=425	n=1.039
Jackets, coats	4.8	4.5	5	3.3	5.2	5.2	4.9	4.5	5.1	5	4.7
Pyjamas, nightdresses	4.4	3.9	4.7	2.8	4.8	5	4.5	4.3	4.4	4.4	4.4
Skirts and dresses	4	1.9	4.3	2.8	4.2	4.9	3.3	4.1	4.4	4	4
Long-sleeve tops	3.7	3.4	3.9	2.5	4.1	3.8	4	3.3	4	3.8	3.6
Sportswear	3.5	3.2	3.8	2.4	3.8	3.9	3.7	3.3	3.7	4.1	3.3
Short-sleeve/ sleeveless tops	3.4	3	3.7	2.2	3.7	3.7	3.6	3.2	3.6	3.7	3.3
Trousers (including shorts)	3.3	3.1	3.5	2.3	3.6	3.5	3.5	3.1	3.5	3.6	3.2
Shoes	2.9	2.6	3.1	1.8	3.2	3.1	3.2	2.6	3	3	2.8

Q7: On average, how long do you use your items of clothing before you get rid of them?

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

Figures given in years

■ above average ■ below average

CRITERIA WHEN BUYING CLOTHES

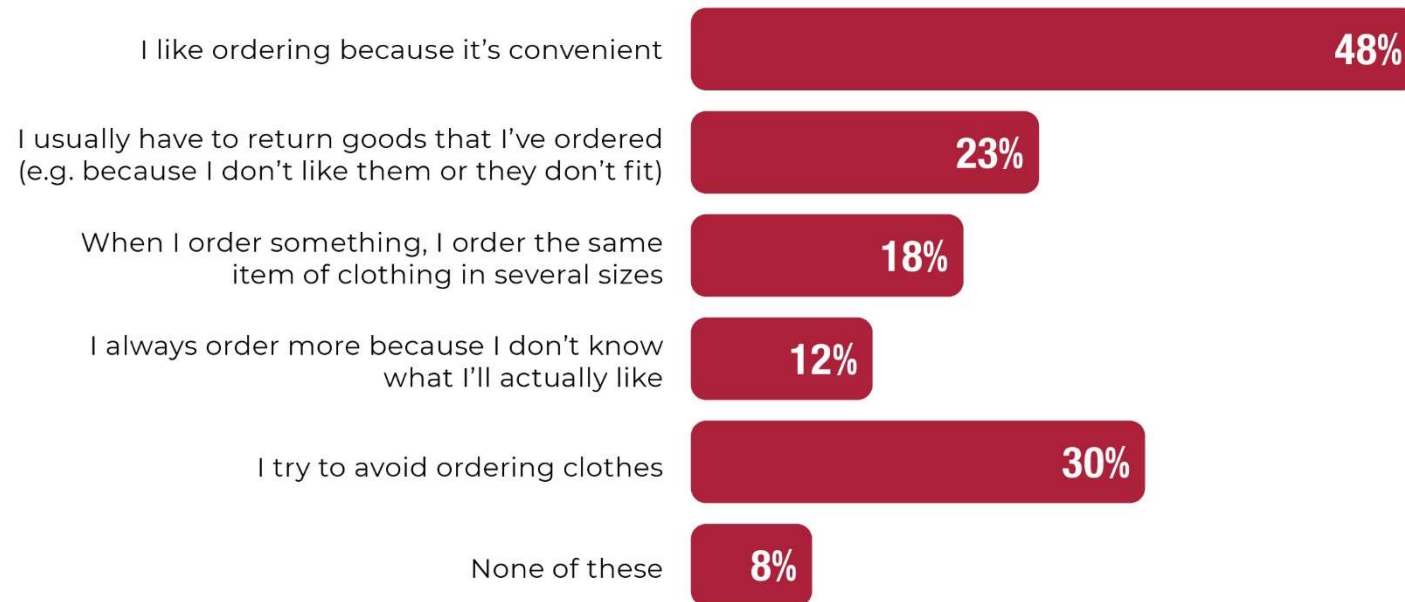
Very or fairly important	OVER-ALL	GENDER		AGE			EDUCATION			HOUSEHOLD NET INCOME	
		Men	Women	16 to 29	30 to 59	60 to 75	Compulsory schooling	Voc. school, apprenticeship	Matriculation exam, university	Up to € 2.000	Over € 2.000
		n=750	n=752	n=333	n=849	n=324	n=339	n=704	n=462	n=425	n=1.039
Function	92%	92%	91%	89%	92%	93%	91%	92%	92%	89%	93%
High quality and finish (long-lasting)	85%	90%	81%	83%	85%	88%	77%	87%	89%	81%	87%
Fabric/material	82%	79%	86%	75%	82%	91%	72%	86%	84%	78%	84%
Low price	78%	75%	80%	77%	78%	76%	89%	75%	72%	83%	75%
Timeless style	73%	69%	79%	76%	71%	78%	66%	77%	75%	69%	76%
High environmental standards in the manufacturing process	44%	42%	47%	46%	41%	52%	34%	47%	48%	43%	45%
Up-to-date style and trend	42%	39%	43%	64%	36%	32%	37%	42%	44%	38%	43%
Ease of repair	40%	39%	41%	43%	38%	43%	39%	40%	41%	44%	38%
High social standards in the manufacturing process	40%	37%	44%	45%	37%	46%	29%	42%	46%	41%	39%
Presence of quality marks	37%	38%	36%	41%	33%	42%	27%	40%	40%	35%	38%
Well-known brand	34%	40%	29%	46%	33%	25%	23%	36%	39%	29%	36%
Uniqueness (not off the shelf)	30%	33%	28%	42%	27%	26%	30%	30%	30%	26%	31%

Q7: How important are the following aspects to you personally when buying clothes?

■ above average ■ below average

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

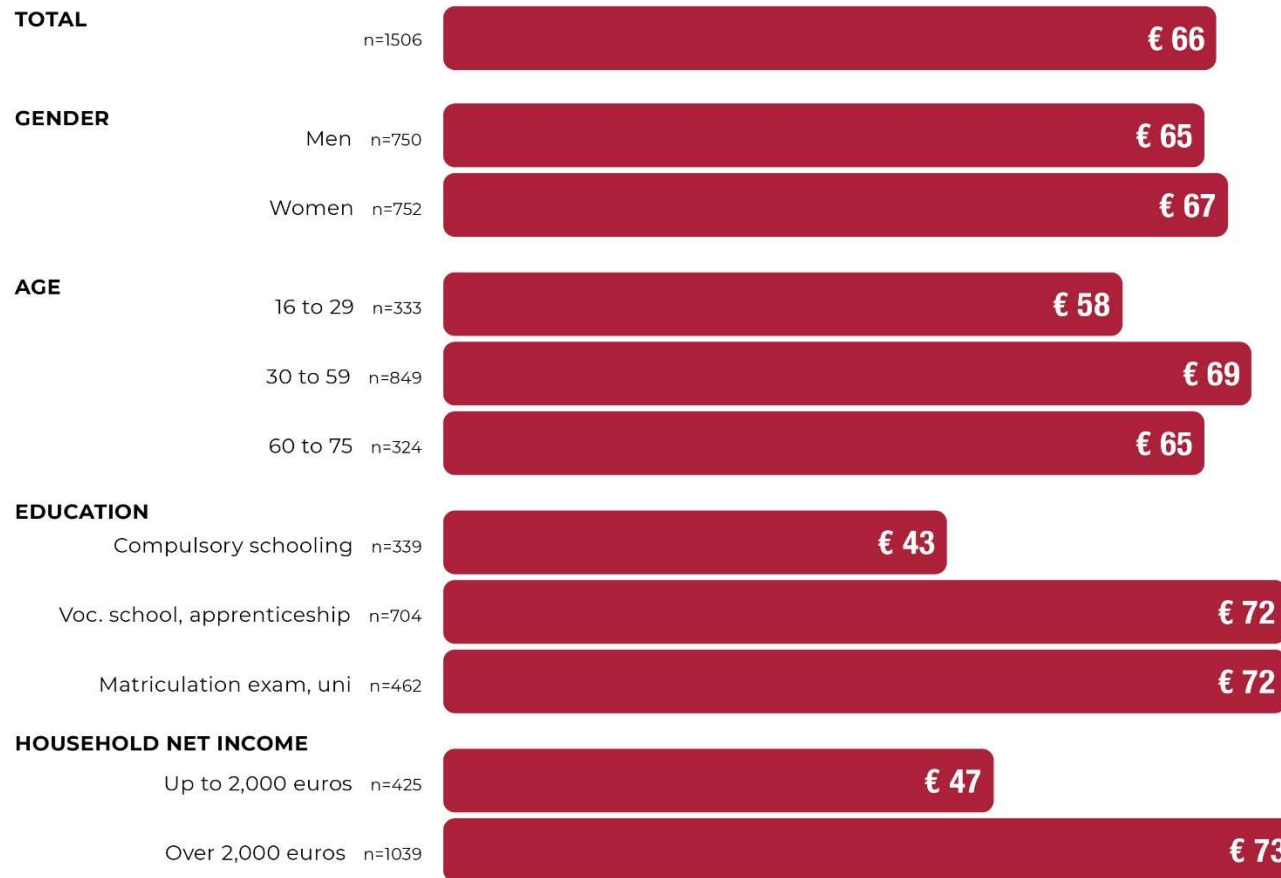
ONLINE-SHOPPING: CRITERIA



Q15: Which of the following statements about ordering clothes online or from a catalogue do you agree with?

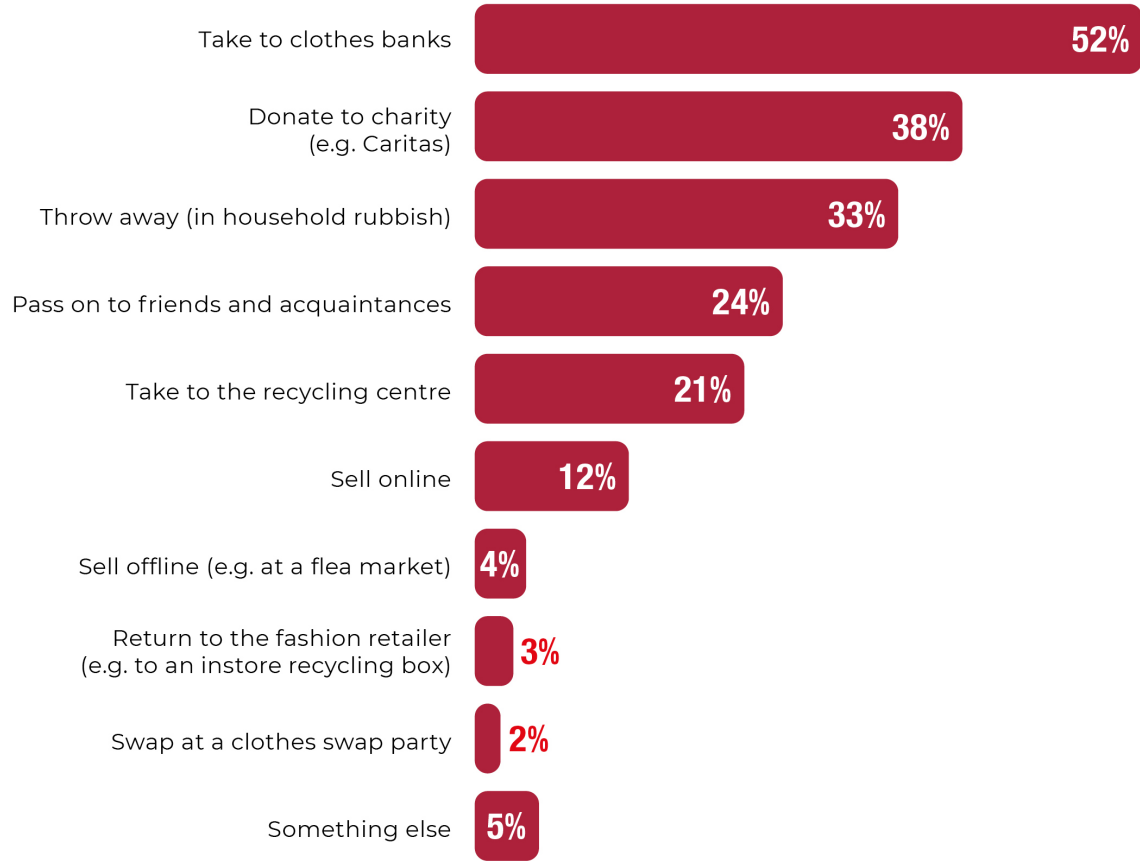
Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

AVERAGE EXPENDITURE PER MONTH



Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

WHAT HAPPENS TO DISCARDED CLOTHES?

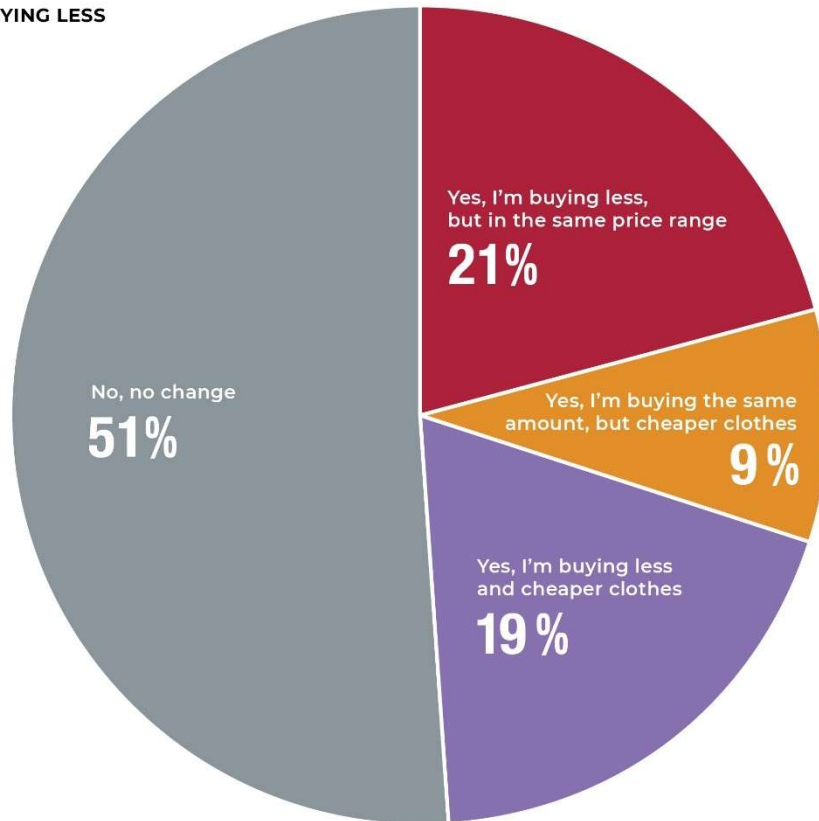


Q15: In the last 12 months, what did you usually do with clothes that you had decided to get rid of?

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

CHANGES IN SHOPPING HABITS DUE TO THE INCREASED COST OF LIVING

40% ARE BUYING LESS

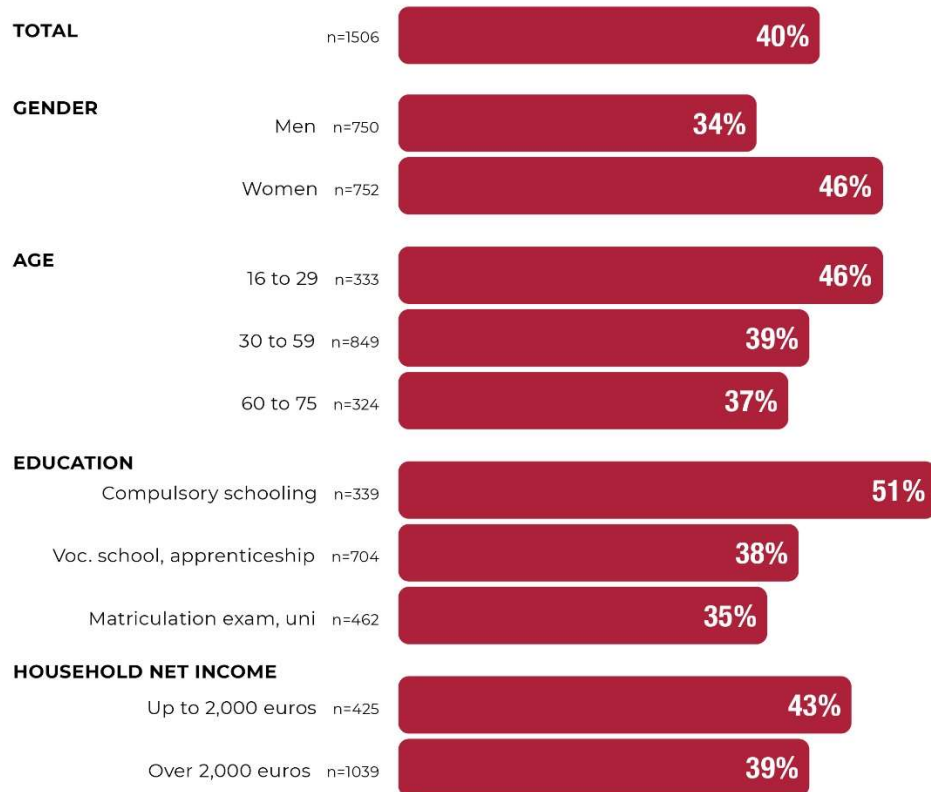


Q17: Have your shopping habits changed when buying clothes and shoes in the past six months due to the increased cost of living?

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
Study conducted by Greenpeace and the Chamber of Labour

CHANGES IN SHOPPING HABITS DUE TO THE INCREASED COST OF LIVING

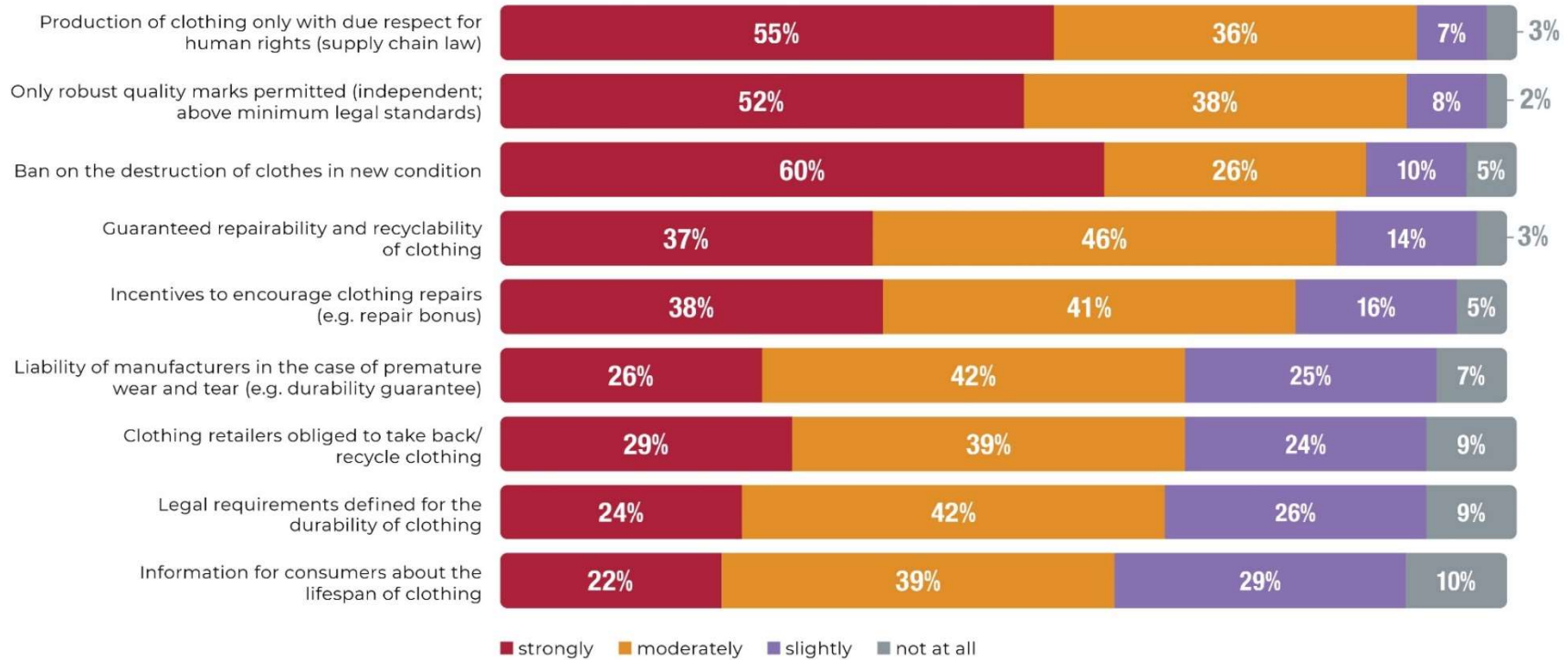
BUYING LESS



Q17: Have your shopping habits changed when buying clothes and shoes in the past six months due to the increased cost of living?

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria
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STATEMENTS ON MEASURES RELATING TO CLOTHING



Q18: You will see various statements below on measures for policymakers and companies relating to clothing (clothes and shoes). To what extent do you agree with these statements?

Source: INTEGRAL online survey, n=1,506 people aged between 16 and 75 in Austria

Study conducted by Greenpeace and the Chamber of Labour