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New Poll from Changing Markets and Clean Clothes Campaign Finds U.S. Public Wants More Transparency from Clothing Brands on Supply Chain Impacts

Landmark survey highlights lack of trust in information provided by fashion giants

WASHINGTON – A new Ipsos MORI poll released today on behalf of the [Changing Markets Foundation](#) and [Clean Clothes Campaign](#) has found that the majority of American consumers want more transparency and information from fashion brands on their commitment to sustainability, in relation to both environmental and social issues. These findings are the result of a comprehensive survey, with over 1,000 interviews carried out in each of the seven participating countries - which include the United States, France, Germany, Italy, Poland, Spain and the UK. Participants were asked to share their public perceptions on environmental and labor issues within the fashion industry and the supply chains of clothing brands.

The poll found that four in five Americans (79%) believe clothing brands should provide information on their environmental commitments and the measures they are taking to minimize pollution in their supply chain. Around three quarters (73%) of the American public also believe that clothing brands should be responsible for what happens in the manufacturing process, and that they need to take measures to ensure clothes are produced in an environmentally friendly way.

Concern about low wages, more information needed

The majority of the American public (81%) feel that clothing brands should provide more information on the working conditions of employees in their supply chains, with a further 63% in agreement that the fashion industry generally pays low wages to factory workers who make their clothes. About half (51%) would be put off buying from a brand that does not pay workers a fair living wage. The majority of consumers polled (57%) would also be willing to pay 2-5% more for their clothing to allow factory workers to earn a fair living wage.

“These findings show that American consumers want more information on working conditions in fashion supply chains and would be put off buying from brands that are not paying a fair living wage. It’s time for the governments to act if the industry is not going to,” said Paul Roeland of the Clean Clothes Campaign.

Trust in brands

The poll indicates that the majority of American consumers are sceptical about the credibility of information communicated by brands, with only a quarter of Americans (25%) saying they would trust the sustainability information provided by clothing brands themselves. In addition, less than a third (30%) think that industry self-regulation is the most effective way to minimise the impacts of the fashion industry on the environment. When asked about a selection of global clothing brands and retailers, including H&M, Nike, and GAP, nearly half (49%) of Americans indicated that they did not know if any of these brands had a sustainable supply chain, and 61% said they generally find it difficult to know which brands or companies meet higher ethical standards.

“This is the most comprehensive consumer survey to date looking at perceptions of environmental and social standards in the clothing industry. It shows that people expect brands to take responsibility for what happens in their supply chains, and greater transparency is needed, both in terms of their workers and the environment. Consumers want more accountability, and more information,” said Urska Trunk of the Changing Markets Foundation.

Concern about viscose (rayon)

The Ipsos MORI survey also reveals 66% of the American public agree that clothing brands should provide information about their viscose (rayon) manufacturers and how their production affects the environment. Less than a quarter (22%) say they would believe a brand if it said it was difficult to find out information about who its viscose suppliers are.

Viscose is a plant-based fibre that’s an increasingly popular alternative to cotton or synthetic products. But [viscose production uses toxic chemicals](#) which have been shown to harm the environment and people’s health if not tightly managed. More and more global consumers are calling on brands to commit to clean viscose, with over 300,000 EU consumers recently signing a [WeMove.EU petition](#) that resulted in several brands including H&M and Zara signing up for Changing Markets’ [Roadmap](#) for cleaner viscose production.

“This survey shows strong public support for action by the fashion industry to ensure brands manufacture clothes in an environmentally friendly way. Companies are going to need to make the switch to cleaner methods to meet these expectations,” Trunk continued. *“We’re calling on more American based retailers – including Forever 21, J.Crew and PVH Corp. (which includes Van Heusen, Tommy Hilfiger and Calvin Klein) - to join EU fashion outlets in signing up to our [Roadmap](#) for cleaner viscose supply chains. We need radical transparency and a shift to a production model that does not destroy people’s lives and natural ecosystems.”*

U.S. consumers lag behind on environmental awareness

The U.S. apparel market is the [largest in the world](#), with store-based retailing in 2016 valued at approximately 292 billion U.S. dollars. The Ipsos MORI poll found that 71% of American consumers purchase clothing in-store, with 48% purchasing through an online marketplace, [such as Amazon.com](#),ⁱ and 35% purchasing directly from brands online.

Though U.S. consumers make up the biggest apparel market worldwide, the poll finds that they are less concerned about environmental issues than consumers in other countries.

The survey found that Americans rank the lowest of the countries polled when it comes to concern about the environmental impacts of their clothing purchases - 34% say they are concerned that the manufacturing of the clothes they buy negatively impacts the environment. American consumers also rank among the lowest when it comes to thinking ethical production is important, indicating that factors such as design and fit, quality, and cost rank more importantly than ethical production when they are considering clothing purchases.

Americans polled are also less likely to undertake sustainable actions than the majority of those in other countries. One in five (20%) indicated they have bought clothes made from sustainable materials over the past year, and only 16% indicated that they made environmentally-friendly decisions when purchasing clothes. Polling did show that a strong minority of American consumers do have some will to adopt more

ethical purchasing behaviours and choices in the future, with 40% saying they would be willing to buy clothes made from sustainable materials in the next six months.

For more information on the polling, interviews and images, please contact Dee Donovanik at ddonavanik@scottcircle.com or 202-695-8229.

Notes:

About the polling

Ipsos MORI were commissioned by the Changing Markets Foundation to undertake a poll amongst adults aged 16-75 in seven different countries; UK, US, France, Germany, Italy, Poland and Spain. A total of 7,701 interviews were carried out, with over 1,000 interviews achieved in each country, as specified below.

| Total | UK | USA | France | Germany | Italy | Poland | Spain |
|-------|------|------|--------|---------|-------|--------|-------|
| 7701 | 1117 | 1117 | 1100 | 1093 | 1076 | 1109 | 1089 |

Demographic quotas were set to achieve a representative adult sample of respondents within each country. Data are weighted back to the known population of each country.

The survey was carried out online, via Ipsos MORI's online omnibus panel (i:omnibus) between 19 – 26 October 2018. As the survey was carried out online, it is representative of the online population only (c.90% across all countries).

*Comparisons between countries are made when they are statistically significant. As the survey took place via an online panel, and therefore with a self-selecting sample, the margins of error are higher. Technically statistical significance and confidence intervals only apply to random probability sampling; however good quality quota surveys have been found to be as accurate in practice.

The questionnaire included the following topics:

- Questions related to how people purchase their clothes, and the choices they make relating to sustainability.
- Perceptions of sustainability issues within the fashion industry, and the supply chains of clothing brands.
- Views on workers' rights and pay in the garment manufacturing industry.
- Specific views on the use of Viscose in the clothes manufacturing process.
- Views on current and alternative clothes certification schemes.

About Changing Markets / Clean Clothes Campaign

The Changing Markets Foundation partners with NGOs on market-focused campaigns. Our mission is to expose irresponsible corporate practices and drive change towards a more sustainable economy. Learn more at www.changingmarkets.org / @ChangingMarkets

Clean Clothes Campaign is a global alliance dedicated to improving working conditions and empowering workers in the global garment and sportswear industries. It brings together trade unions and NGOs

covering a broad spectrum of perspectives and interests, such as women's rights, consumer advocacy and poverty reduction. Learn more at www.cleanclothes.org / @cleanclothes.

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ⁱ <https://www.cnn.com/2018/04/19/amazon-to-be-the-no-1-apparel-retailer-in-the-us-morgan-stanley.html>