It takes many

Mobilising collective action
to enable more sustainable
consumer choices in fashion

zalando

Disclaimer

About Zalando

Founded in Berlin in 2008, Zalando is Europe's leading online multi-brand fashion destination. We are building a pan-European ecosystem for fashion and lifestyle e-commerce, along two growth vectors: Business-to-Consumer (B2C) and Business-to-Business (B2B). In B2C, we provide an inspiring, high-quality multi-brand shopping experience for fashion and lifestyle products to more than 52 million active customers across 25 markets. In B2B, we leverage our logistics infrastructure, software, and service capabilities to support brands and retailers in managing and scaling their entire e-commerce business, both on and off the Zalando platform. Through our ecosystem vision, Zalando aims to enable positive change in the fashion and lifestyle industry.

About GlobeScan

GlobeScan is an insights and advisory firm specialising in trust, sustainability, and engagement. We equip clients with insights to navigate shifting societal and stakeholder expectations, crafting evidence-based strategies that reduce risks and create value for their organisations and society. Our purpose is to co-create a sustainable and equitable future. Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto. GlobeScan is a participant in the UN Global Compact and a Certified B Corporation.

Acknowledgements

The authors would like to thank all the research participants – general fashion consumers, Zalando customers, brand partners, and industry experts – for their contributions. Their perspectives and ideas were instrumental in the development of this report. Please refer to the Appendix for more information on the research participants.

Our thanks also go to all colleagues at Zalando who helped create this report – especially Alex Dohmen, Aline Guimaraes Lacerda, Aysenur Akyuez, Blanca Trepat, Dorothee Schultz, Jade Buddenberg, Maria Krugovykh, Melissa Gile, and Lucy Power.

Particular thanks go to GlobeScan's team who helped bring this project to life: Perrine Bouhana, Kathryn Borrell, Sophie Tuzemen, Tom Lees, Eugene Kritski, Crystal Yang, Svetlana Rakevitch, Harshita Sharma, Francis Cowan, and Alana Duval.

Publisher: ZALANDO SE
Authors: Pascal Brun with contributions from Clémence Hermann, Daniel Enke, Elizabeth Carttar, Katharina Asbrock, Lana Criggs, Katja Hallbauer, Nora Kurzhöfer and our colleagues at GlobeScan (Perrine Bouhana, Kathryn Borrell, Sophie Tuzemen, and Tom Lees)

Concept & Art Direction: Zalando Brand Design Team

The web version is available here.

Contents

Foreword

Pascal Brun, Vice President of Sustainability and Diversity & Inclusion (D&I)

In 2021, we published "It takes two", a comprehensive report highlighting a significant gap between consumers' intentions to adopt more sustainable fashion habits and their actual purchasing behaviours. We identified an "attitude-behaviour gap" and emphasised the need for collaboration between the industry and consumers to bridge it. Those insights sparked valuable conversations about the future of fashion and sustainability.

Today, in 2025, we find ourselves at a new juncture. With greater insights and a deeper understanding, our latest report, "It takes many," reflects the evolution of both our perspectives and the world around us. The challenges we face as an industry have become increasingly complex, shaped by global shifts and emerging consumer realities.

At Zalando, we believe that tackling today's challenges requires collective action and a shared commitment to responsibility. It requires collective efforts from brands, retailers, regulators, social media platforms, influencers, civil society, and consumers. Each of us has a role to play, but only through partnership and collaboration will we truly drive change.

"It takes many" embodies this mindset. It explores the changing dynamics within the fashion industry and the barriers consumers face in making more sustainable purchasing decisions. While the desire for responsible consumption remains strong, the reality is often shaped by economic constraints, unclear product information, and growing scepticism about sustainability claims. To address these challenges, we as an industry must rethink how to make more sustainable options more accessible, affordable, and attractive while meeting consumers wherever they are in their journey.

At Zalando, we are aware of our role in this ecosystem. We are committed to supporting consumers and brand partners on their journeys toward a more sustainable future, whether through improving our product range, innovating our own brands, expanding our re-commerce offering, or reducing our carbon footprint. We are determined to contribute to creating an industry where more sustainable choices are not just an option but the norm. Our commitment to listening, learning, and evolving remains at the heart of our approach. This report serves both as a reflection on the current state and a call to action.

Lastly, I want to thank all those who contributed to this report – the researchers and analysts, whose dedication and expertise were invaluable, the consumers who shared their insights and experiences, the industry experts who provided their perspectives and guidance. Thank you as well to my colleagues at Zalando, whose passion and dedication drive us forward every day.

The journey toward a more sustainable fashion industry is undoubtedly challenging – it requires continuous collective efforts, transformative changes from all stakeholders, and an enduring commitment to progress. I remain confident that through collaboration, innovation, and a shared vision, we can shape the industry and create a future where sustainability and fashion go hand in hand.

Executive summary

Four years after our inaugural “It takes two” report, this new research takes a deeper look at the barriers facing consumers and outlines how a more systemic and consumer-centric approach can help close the gap between aspiration and action.

While much of the existing consumer research highlights a persistent attitude–behaviour gap in sustainability, including in fashion, we chose not to simply track that gap as it was measured in 2021. Instead, we went beyond it this year to explore how it can be effectively bridged moving forward.

Beyond the gap: Unpacking barriers to consumer aspirations

Consumers report being aware of more sustainable fashion, and many are already making intentional choices in this area. However, the attitude-behaviour gap persists: consumers continue to aspire to make more sustainable fashion choices in the future, with more than seven in ten consumers wanting to be more sustainable in what they buy (71%) and how they wear it (74%).

Several key barriers are preventing consumers who want to be more sustainable from realising their aspirations:

- **Price premium** on more sustainable items (being too expensive for 41%)
- **Difficulty distinguishing** what is more sustainable from what is not (27%)
- **Uncertainty** about where to shop for more sustainable items (24%) and what actions to take (21%)
- **Scepticism** toward companies' sustainability claims (19%)

Notably, limited access to information, guidance, and affordable options is strongly linked to consumers' aspirations to make more sustainable buying and wearing decisions.

It takes many: A call for collective action

Consumers and industry experts agree: the responsibility for enabling more sustainable consumer choices in fashion must be shared.

- **Brands and retailers** are expected by 77 percent of consumers to help, notably by making more sustainable products accessible and the default choice, while supporting consumers at every stage, not just at the point of sale.
- **Governments and the EU** (63% and 66%, respectively) are encouraged to lower taxes on more sustainable fashion, support infrastructure for recycling, resale, and repair, and introduce simplified labelling systems to help consumers make their choices with greater confidence. Allowing brands and retailers to communicate about more sustainable fashion, provided their claims are transparent and verifiable, is also seen as key to supporting informed choices.
- **Social media platforms and influencers** (65% and 61%, respectively) have a critical role in shifting cultural narratives and promoting more sustainable behaviours.

And many other actors across the value chain are called on to play their part. No single actor can close the gap alone – coordinated action is required to bring about system-wide change.

What's next with consumers? Taking a more consumer-centric approach

To enable more sustainable consumer choices in fashion, all actors must meet consumers where they are, not where we assume or wish them to be.

Consumers are diverse in their motivations and behaviours – our segmentation identifies four groups among the consumers we interviewed that can be more effectively engaged through a deeper understanding of their drivers, challenges, and sources of inspiration:

- **Fashion First (37%)**, who prioritise style and self-expression
- **Conscious Curators (21%)**, who balance style and sustainability
- **Mindful Minimalists (23%)**, for whom less is more
- **Indifferents (18%)**, for whom fashion is functional

The conclusions of this research align with what behavioural science points to as the three essential conditions for behaviour change: capability, opportunity, and motivation.

Our findings suggest three concrete actions to address each of these:

- Equipping consumers with the relevant information and guidance to act (capability), if permitted by regulations
- Enhancing visibility, access, and affordability with the contribution of actors across the fashion value chain (opportunity)
- Engaging the full range of consumer aspirations and values (motivation)

Addressing all three is key to bridging the gap between intention and impact, and enabling more sustainable consumer choices in fashion.

Introduction

In 2021, we published our "It takes two" report, shedding light on the disconnect between consumers' intentions to embrace more sustainable fashion habits and their actions. Faced with this "attitude-behaviour gap," we highlighted the need for a joint effort by industry and consumers to bridge the gap regarding more sustainable fashion. Since then, we have worked on applying these learnings, continued to focus on offering quality assortments and experiences that align with our values and support more responsible choices for our customers (e.g. detailed filter options for key impact areas, expanding our more sustainable assortment, providing educational content), and strengthened our collaboration with brands to increase the availability of more sustainable options.

In the last four years, however, our world has changed profoundly.

Economic uncertainty, the energy and cost-of-living crisis, and widespread supply chain disruptions have greatly impacted our industry after the COVID-19 pandemic. These challenges have reshaped consumer behaviour and priorities across Europe, leading people to adjust their spending habits, cut back on non-essential purchases, and become increasingly price sensitive.

Concurrently, the rise of ultra-fast fashion players has introduced a new dynamic to the market. These retailers, known for their rapid production cycles, questionable business practices, and low prices, have made affordable but short-lived fashion items more accessible to consumers. This trend has intensified competition and raised important concerns about sustainability and mindful consumption.

Lastly, a wave of new regulations, introduced during the European Commission's 2019–2024 mandate, is reshaping the landscape in which we operate. The uncertainty surrounding upcoming changes, coupled with the challenges in interpreting existing legislation, and combined with fragmented and inconsistent enforcement of the current rulebook, has particularly hindered brands' and retailers' ability to communicate about more sustainable fashion to consumers.

These shifts have tested our assumptions and challenged both industry and consumers to adapt. Based on our unwavering belief that listening and learning are the best ways to keep getting better, we have set out to update our initial research to understand, in this new context, what's preventing consumers from making more sustainable fashion choices and what's needed to bridge the gap now.

At Zalando, we know that our customers are passionate about expressing themselves through style and seek to balance their love for fashion with a desire to make more conscious choices. As this new report shows, their aspirations for more sustainable fashion remain strong, but many barriers still stand in their way. Retailers, brands, policymakers, and others need to come together to address systemic barriers and help meet consumers where they are, with the very needs and aspirations they have.

Change cannot be the work of a few. It requires collective action. It takes many.

Methodology

This research report employs a robust mixed-methods approach, combining quantitative and qualitative insights to explore how consumers engage with fashion and the topic of sustainability, while also incorporating expert perspectives on what is needed from the fashion ecosystem moving forward.

Quantitative consumer survey

A comprehensive 25-minute online survey was conducted across five of Zalando's key markets – Germany, France, Italy, Sweden, and the UK – to assess general consumer attitudes, behaviours, and expectations regarding fashion and sustainability.

In the survey, fashion was broadly defined as clothing and footwear, without focusing on specific categories. The topic of sustainability was explored through two key dimensions that are at the heart of how Zalando supports customers in making more sustainable fashion choices:

Making more intentional purchasing decisions based on sustainability considerations – for example, choosing products made from materials like organic cotton and recycled fibres, selecting items designed for durability and longevity, with transparency and trust;

Empowering customers with the knowledge and resources to extend the life of their garments through actions such as sharing content and tips on repairing, renewing, mixing and matching, caring for fashion items, and reselling them.

The survey reached a total of 5,013 respondents, evenly split between Gen Z and Millennial participants (aged 18 to 44). The sample was balanced in terms of gender and spread across different education and income levels to ensure a mix of perspectives and social backgrounds. The sample included both Zalando customers and non-customers.

Qualitative customer interviews

To complement and contextualise the quantitative data, we conducted 11 in-depth qualitative interviews with Zalando customers who had previously participated in the quantitative survey. These interviews focused on participants from France, Germany, Italy, and Sweden.

The conversations offered rich insights into customer motivations, behaviours, and challenges related to more sustainable fashion. They helped illuminate where customers are on their sustainability journey, the barriers they face, and the types of support they look for to make more conscious choices.

Deep-dive expert interviews

To further enrich the findings, we conducted eight in-depth interviews with stakeholders from across the fashion ecosystem – including partner brands, industry associations, advisory consultancies, and independent experts.

These conversations explored how various actors can enable more sustainable consumer choices and support a broader industry transition.

Beyond the gap: Unpacking barriers to consumer aspirations

The three key takeaways

1

Strong foundations and aspirations

Nearly two-thirds (62%) of consumers say they know about more sustainable fashion and 66 percent are already making fashion choices with sustainability in mind. A vast majority expresses aspirations to do more in the future, whether in purchasing (71%) or wearing (74%) more sustainably.

2

Aspirations vs actions

This willingness to do more in the future reflects a high level of consumer aspiration, but also underscores a persistent attitude–behaviour gap, with many still struggling to act on their intentions today. While we did not fully track this attitude–behaviour gap compared to 2021, directional insights suggest that some behaviours are shifting. While consumers report that they are increasingly buying second-hand, repairing garments, checking product labels, and responsibly disposing of clothing, other gaps persist, or have even widened, particularly when it comes to checking brands' environmental practices or labour policies.

3

Barriers

Higher prices remain the single biggest obstacle for 41 percent of consumers who aspire to make more sustainable purchasing or wearing decisions. Other common barriers include difficulty in identifying more sustainable fashion items (27%), not knowing where to find them (24%), and a general lack of knowledge on how to make more sustainable choices (21%). These challenges are further complicated by recent EU legislation and anticipated delegated acts that make it harder for brands and retailers to communicate about sustainability. This presents a key challenge, as additional analysis shows that limited access to guidance and transparency – along with price premiums – continues to prevent consumers from realising their aspirations.

Strong foundations in consumer awareness and actions

When asked how much they know about more sustainable fashion, a majority of consumers (62%) report knowing a lot to a moderate amount. This is an encouraging sign that more sustainable fashion, even at varying degrees of understanding, is becoming an important part of the fashion conversation. Only 4 percent of consumers say they have never heard of it.

A majority of consumers also report turning their knowledge into tangible actions, with two-thirds of respondents (66%) reporting that the fashion choices* they have made in the last 12 months have been very or fairly sustainable.

62% say they know a lot to a moderate amount about fashion that is more sustainable

66% say their fashion choices have been very to fairly sustainable in the last 12 months

*The survey defined "more sustainable fashion choices" as considering the impact on the planet and the people involved, including considerations around sourcing materials, manufacturing processes, purchasing habits, and how fashion items are worn and cared for to make them last longer.

What has changed since 2021

Although our 2025 analysis of consumer aspirations and actions uses a different approach than in our 2021 "It takes two" report, directional insights still reveal important shifts: some behaviour gaps are narrowing, while others remain or have grown.

Trending up

Consumers seem to be more frequently embracing actions like buying second-hand, repairing garments, checking product labels, responsibly disposing of clothing, and seeking advice, though to varying degrees. These behaviours stand out for being affordable, easy to integrate into daily routines, and offering clear, tangible benefits – a point echoed in qualitative interviews.

Falling behind

In contrast, consumers seem to be less frequently able to check brands' environmental practices or labour policies when shopping. This is likely due to retailers and brands removing sustainability messaging in fear of not complying with current or upcoming regulations, leading to what some call "green hushing." In interviews, respondents often pointed to the lack of reliable, consistent, and digestible or easy-to-understand information as a key barrier to making more sustainable purchasing or wearing decisions.

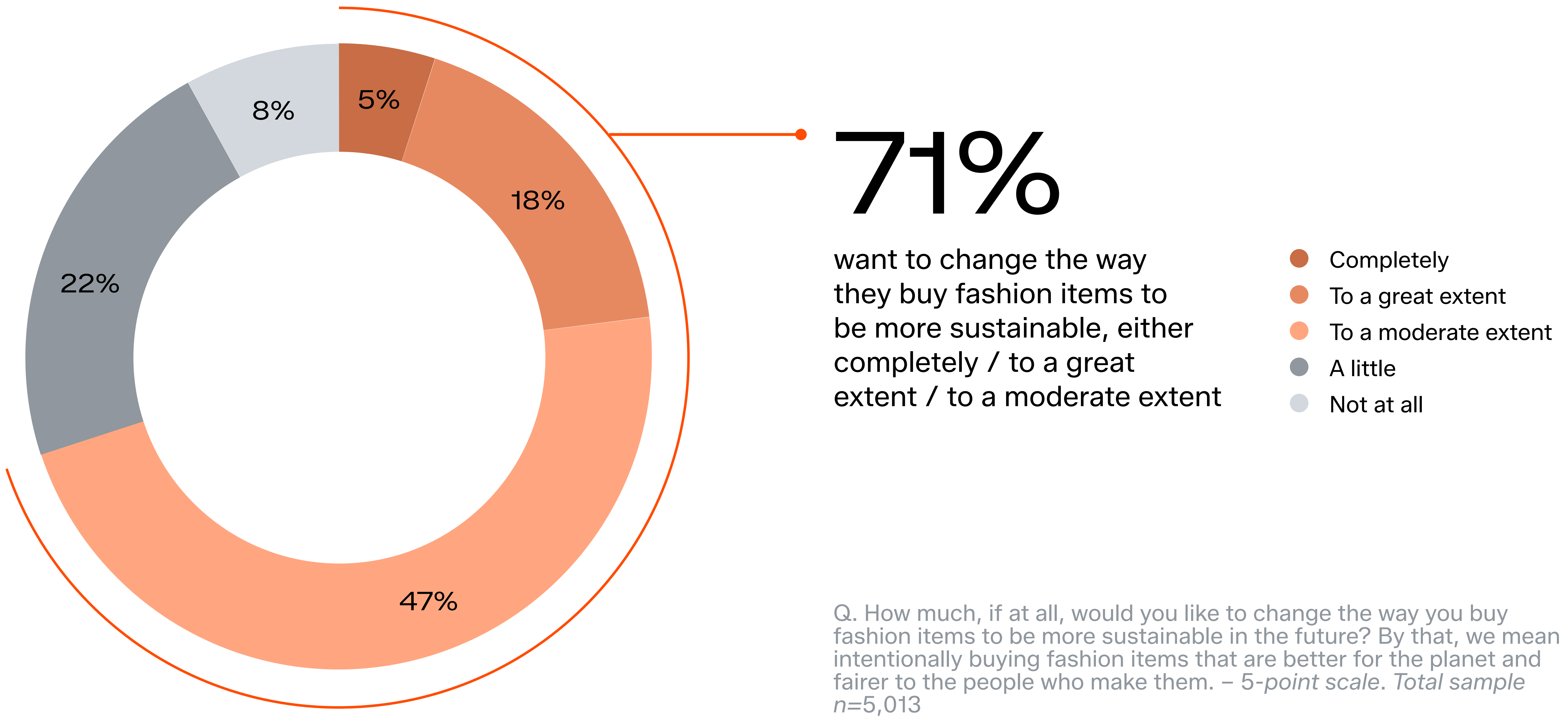
Strong aspirations to do more and a prevailing attitude-behaviour gap

Most importantly, consumers also tell us that they are eager to do more and take the next step to make more sustainable fashion choices in the future.

In physical shops or online, 71 percent say they would like to change the way they buy fashion items to be more sustainable in the future,* whether completely (5%), to a great extent (18%), or to a moderate extent (47%).

In other words, they are keen to buy fashion items that are less harmful to the planet and fairer in terms of production conditions. This can include, as we heard during qualitative interviews with Zalando customers, looking for transparent and trustworthy information, prioritising durability, seeking clothing and footwear from more responsible brands that avoid fast fashion, prioritise worker welfare, use more sustainable or recyclable materials, contain no plastic, and are free from harmful chemicals.

Desire to change the way I buy fashion items to be more sustainable in the future



Q. How much, if at all, would you like to change the way you buy fashion items to be more sustainable in the future? By that, we mean intentionally buying fashion items that are better for the planet and fairer to the people who make them. – 5-*point scale. Total sample n*=5,013

***Changing the way I buy fashion items to be more sustainable in the future** was defined in simple terms in the survey as "intentionally buying fashion items that are better for the planet and fairer to the people who make them."

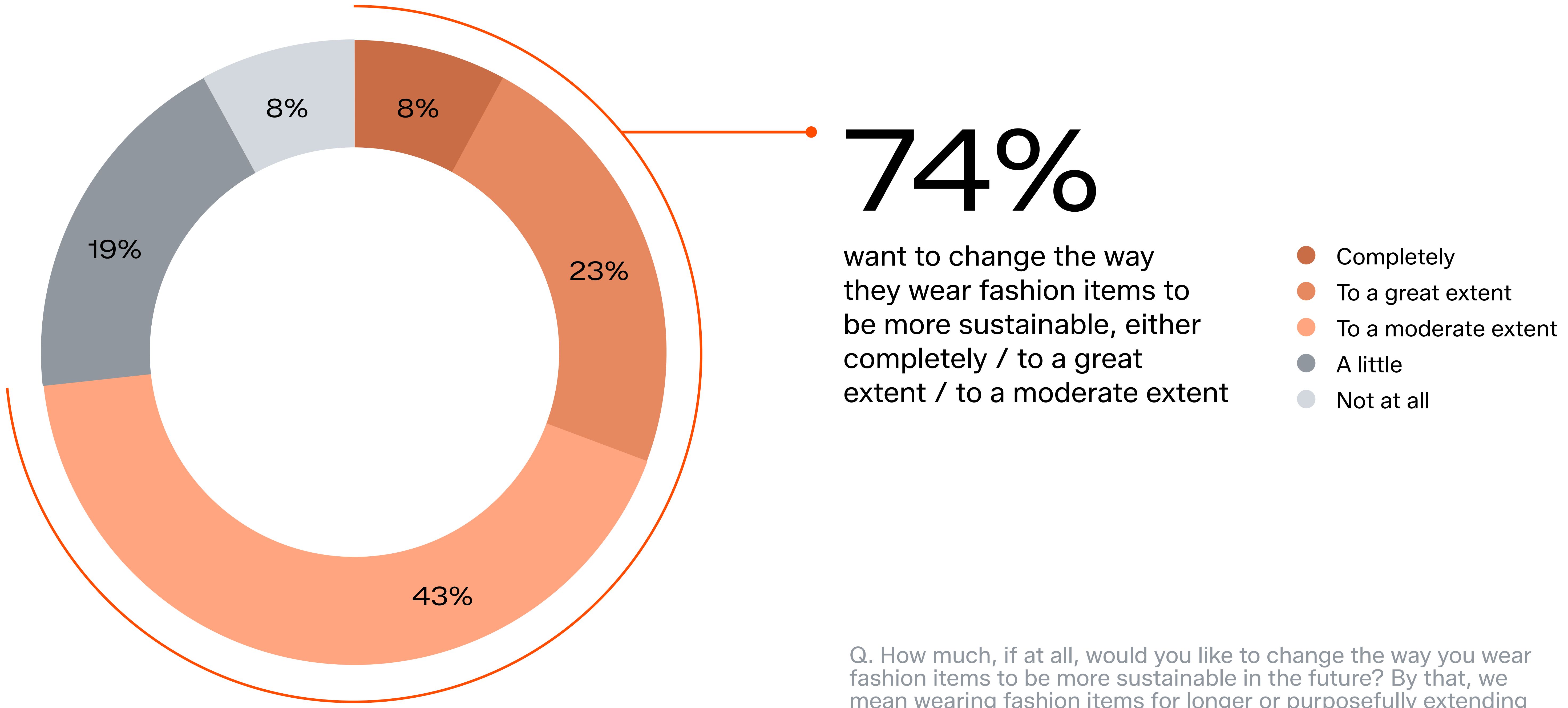
Even more respondents (74%) say they want to change the way that they wear fashion items to be more sustainable in the future,** with around three in ten (31%) saying they would like to change this either completely or to a great extent.

Across varying perspectives and approaches to the topic of sustainability, consumers we have interviewed find one key common ground: they want to wear and love their fashion pieces for as long as possible by caring for them (e.g. fixing, tailoring, gentle washing at 30 degrees) or giving them a second chance at life (e.g. reselling, recycling, donating, etc.) instead of discarding them in bins that end up in landfills.

These aspirations to do more echo our findings from the "It takes two" report in 2021 and show that a gap persists between consumers' intentions to purchase or wear fashion items more sustainably and their ability to achieve those intentions today.

This year, we set out to go beyond this gap and better understand what prevents consumers from realising their aspirations.

Desire to change the way I wear fashion items to be more sustainable in the future



Q. How much, if at all, would you like to change the way you wear fashion items to be more sustainable in the future? By that, we mean wearing fashion items for longer or purposefully extending their lifespan (e.g., by repairing, caring for them, or passing them on). – 5-*point scale. Total sample n*=5,013

** **Changing the way I wear fashion items to be more sustainable in the future** was defined in simple terms in the survey as "wearing fashion items for longer or purposefully extending their lifespan, e.g. by repairing and caring for them."

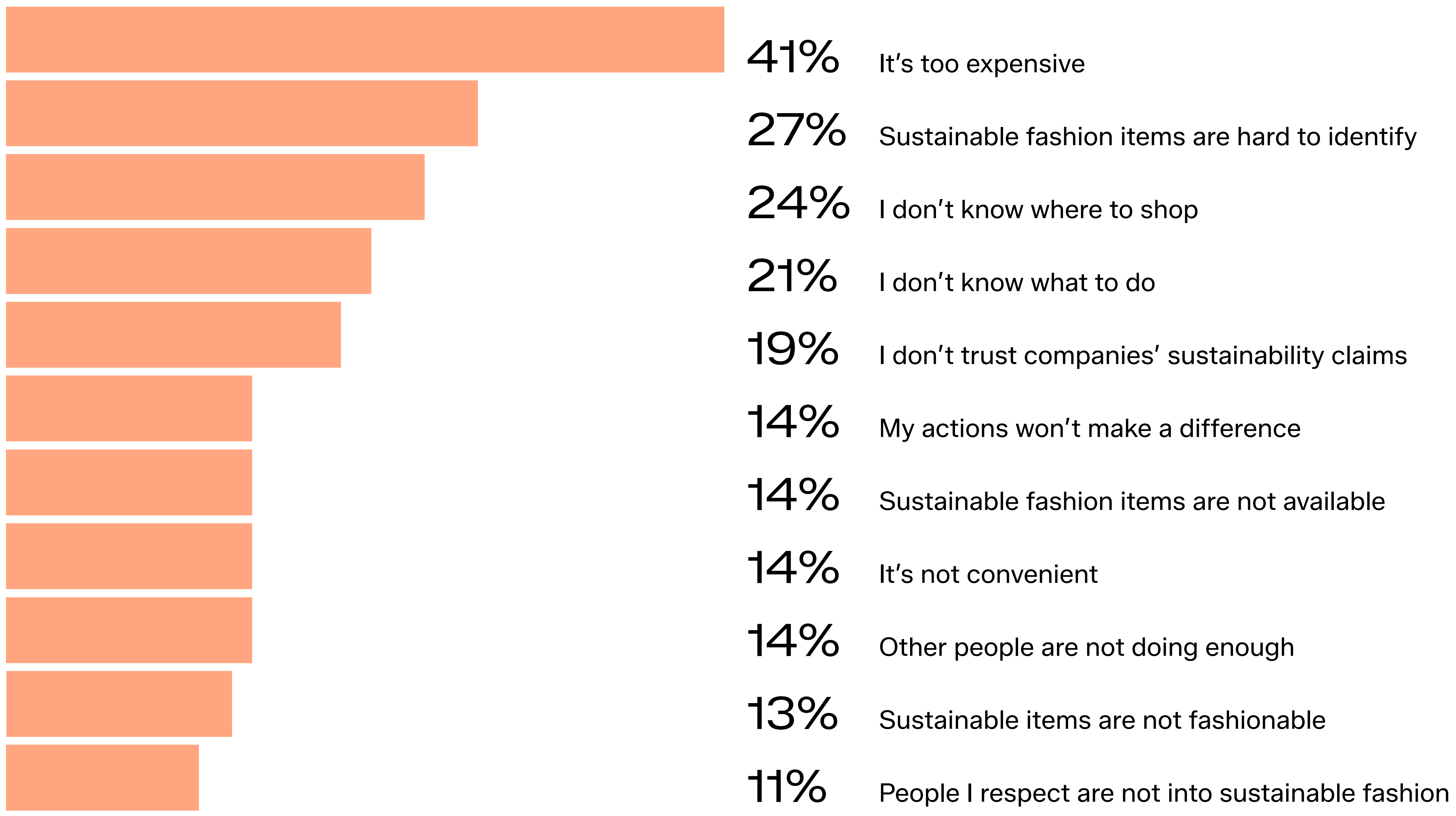
Several barriers stand in the way of consumers realising their aspirations

The primary obstacle consumers say they face when wanting to make more sustainable purchasing and wearing decisions is price, with 41 percent citing it as their top barrier, well ahead of any other.

Beyond cost, many consumers tell us they struggle to identify more sustainable options, with 27 percent expressing difficulty in distinguishing what is more sustainable from what is not. Additionally, 24 percent are unsure of where to shop for more sustainable products, while 21 percent feel unclear about what actions to take to make more responsible choices.

The scepticism surrounding sustainability claims adds yet another barrier, with 19 percent of consumers questioning the authenticity of company claims.

Barriers to being more sustainable



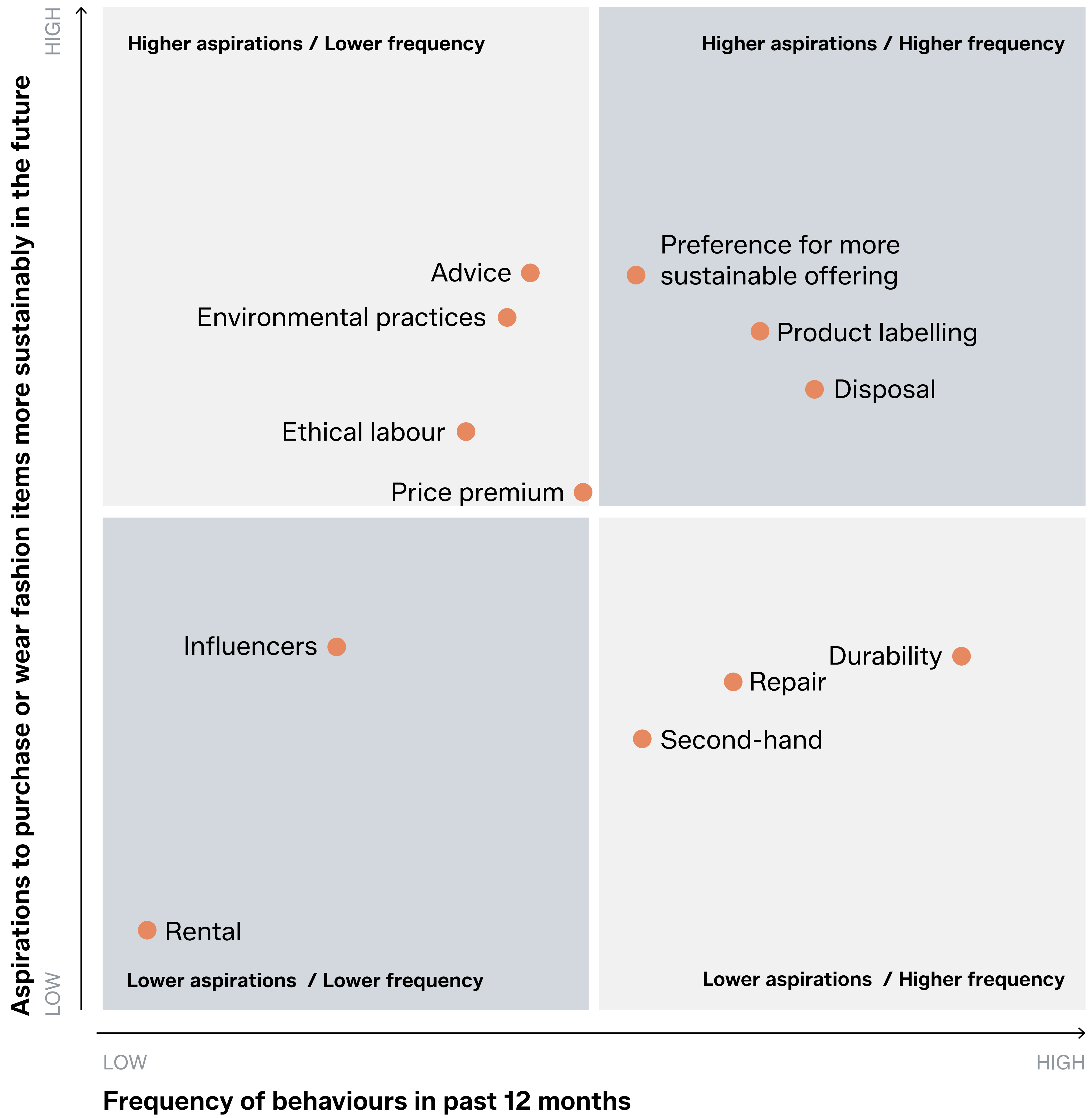
Q. You said you would like to change the way you buy and/or wear fashion items to be more sustainable. What is currently preventing you from doing more? – select up to five. *Subsample: All who want to change their behaviour n=4,755*

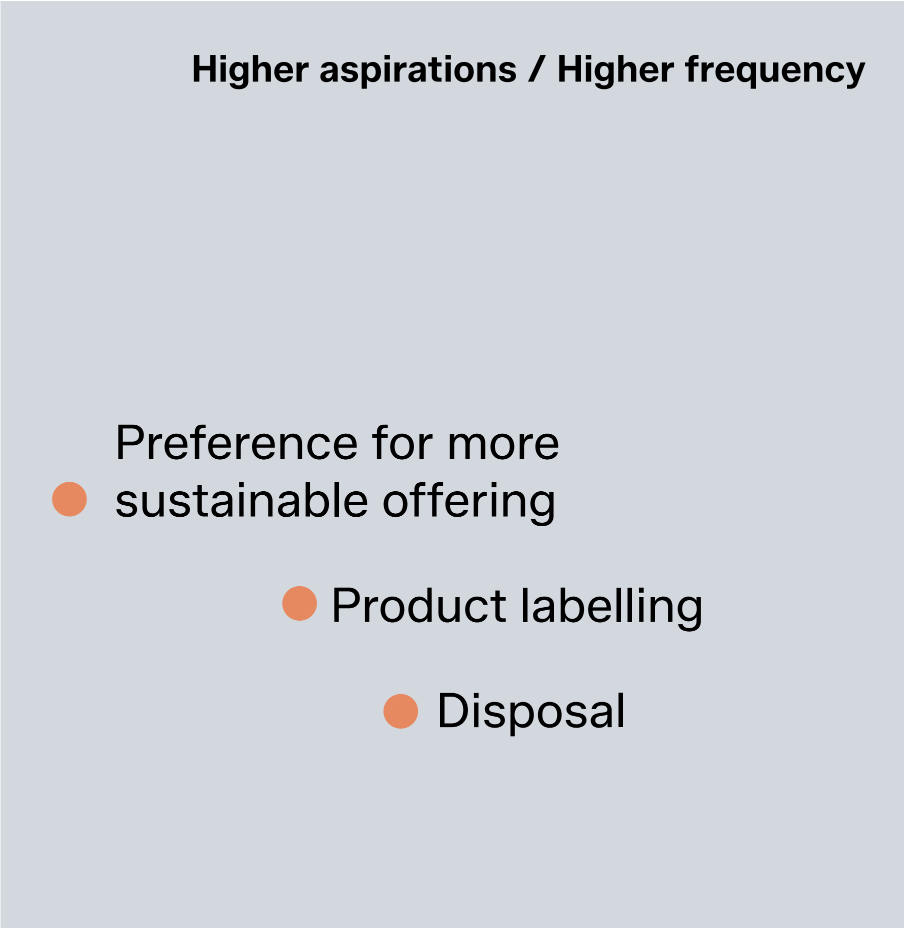
Further insights into the challenges consumers face can be gained by comparing how frequently fashion consumers engage in key behaviours with how these behaviours connect with their aspirations to make more sustainable purchasing or wearing decisions in the future.

This analysis uses regression modelling to investigate the relationship between consumers' self-reported behaviours over the last year (x-axis) and their aspirations to purchase and wear fashion items more sustainably in the future (y-axis).

This statistical modelling enables us to determine which behaviours consumers unconsciously feel are most linked to their aspirations to be more sustainable in the future, without requiring respondents to directly rank or choose behaviours, thereby reducing the bias often introduced by social desirability in surveys.

Frequency of behaviours vs aspirations to purchase or wear fashion items more sustainably





What's working:
Key consumer behaviours aligned with their aspirations

Consumers report frequently taking action in areas that are highly associated with their aspirations to make more sustainable choices (see the top right-hand quadrant of the matrix). These include choosing more sustainable products over conventional ones *(preference for more sustainable offerings)*, checking labels for product information *(product labelling)*, and disposing of old items responsibly, including by reselling or donating them *(disposal).*

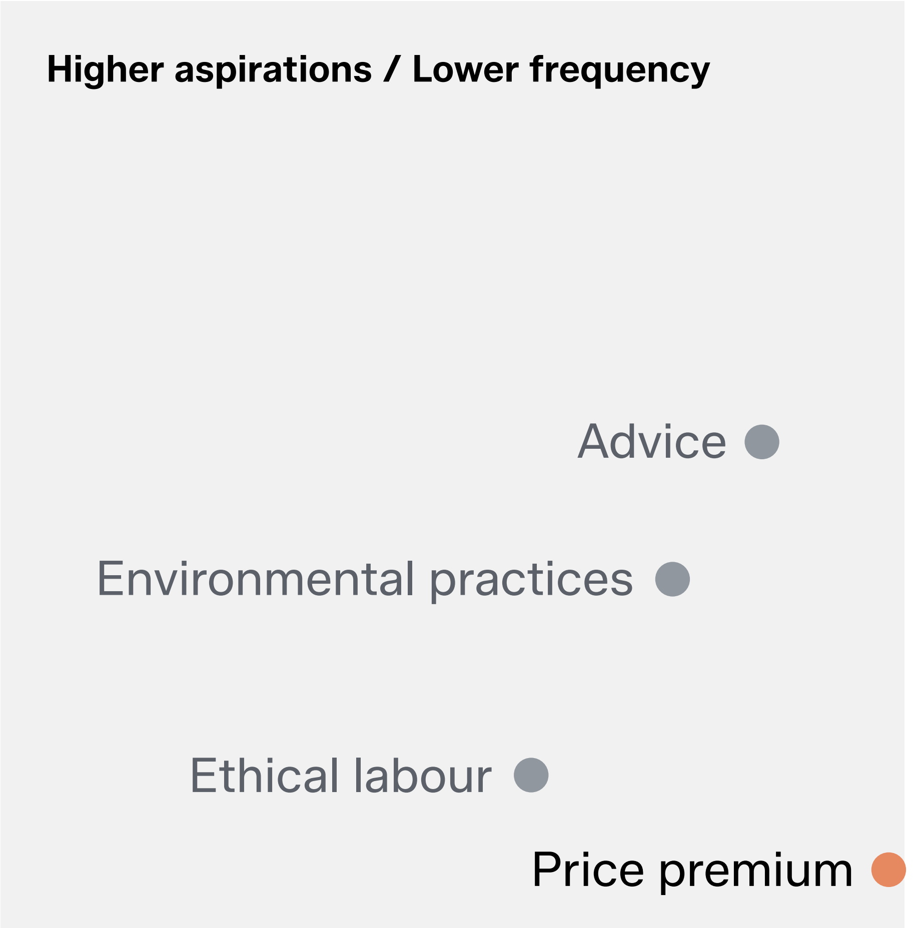
The information gap:
The challenge for consumers to access the guidance they seek

Seeking advice on more sustainable fashion choices and behaviours *(advice)* and checking a brand's environmental practices and labour policies when shopping *(environmental practices, ethical labour)* are highly associated with consumers' aspirations to make more sustainable buying and wearing decisions.

However, consumers engage with these actions much less frequently, indicating that they need support and information, but struggle to find it in an environment in which regulations have severely limited how much retailers and brands can communicate about sustainability. Qualitative interviews also reveal that consumers are often seeking simple information to guide their decisions. The lack of such information is counterproductive, as it prevents them from making more sustainable choices.

"I spent so much time looking for a [sustainable vegan leather] jacket that I could buy, and I have to say that it is sometimes the reason why I don't buy such items. I try to look for something a little bit more sustainable, and I can't find it. It takes me so much time to find the information, and in the end, I just get annoyed and I don't buy it."

Alice
Germany



The price premium barrier:
Aspiring to more sustainable fashion without the cost

While consumers tell us they prioritise more sustainable products over conventional ones, the data show they are less frequently willing, or able, to pay the premium *(price premium)* they associate with more sustainable purchasing and wearing decisions. This creates a barrier for many and highlights the importance of addressing the "who pays" dilemma, whether it should be consumers, businesses, or governments who bear the costs. Without systemic solutions, less sustainable fashion risks becoming the only affordable option.

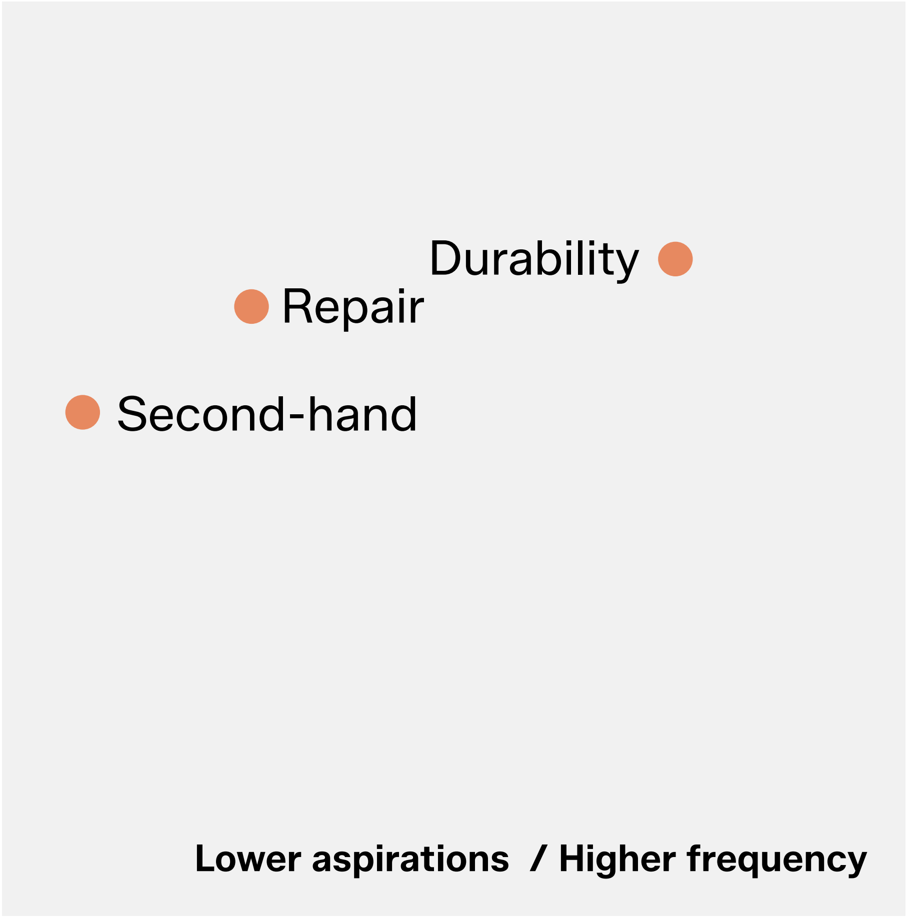
> "The price and the perceived value of a product are important to me. If a high price is solely due to making the product sustainable or creating a sustainable image, I tend to choose a slightly less sustainable but more affordable option."

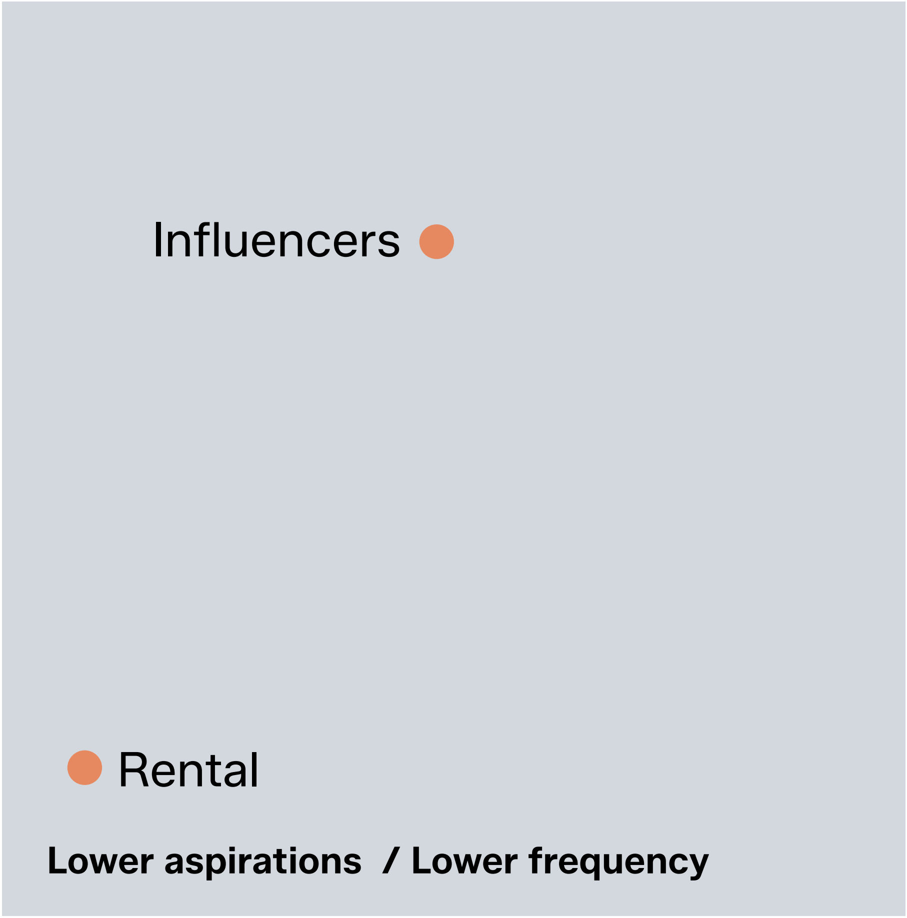
Christian
Germany

What about other behaviours?

Other behaviours, such as repairing clothes *(repair)*, buying pre-owned/second-hand clothes *(second-hand)*, or intentionally buying clothes that last a long time *(durability)* are performed relatively often but are less associated with more sustainable fashion aspirations. This indicates that these behaviours are not solely driven by sustainability motivations but may be influenced by other priorities, such as saving money.

On the other hand, looking for influencers who can offer guidance on more sustainable fashion behaviours *(influencers)* or renting clothes *(rental)* are reported as the least frequently performed actions. These behaviours are also among the least associated with more sustainable fashion aspirations, suggesting that the current market offerings are insufficient to drive uptake and realise their potential for sustainable impact.





It takes many:
A call for collective action

The three key takeaways

1

Shared responsibility

Consumers see more sustainable fashion as a collective responsibility. Over seven in ten believe that both brands and retailers (77%) and individuals like themselves (72%) should support them in making more sustainable fashion choices. But consumers also look to a wider range of other actors to contribute, including the European Union (66%) and national governments (63%), social media platforms (65%) and influencers (61%), international organisations (63%), and non-governmental organisations (60%).

2

Clear roles and expectations

Consumers and industry experts have clear expectations regarding the role of various stakeholders in promoting more sustainable fashion. This includes retailers and brands making more sustainable fashion the default choice and supporting consumers through every stage of their journey. Additionally, national governments and the EU are expected to reduce taxes on more sustainable fashion, invest in supporting infrastructure, implement simplified labelling systems, and allow brands and retailers to communicate about more sustainable fashion. Social media platforms and influencers are likewise crucial in driving momentum for more sustainable fashion, shifting the focus away from constantly new, but short-lived fashion items.

3

A system change effort

Bridging the gap between consumers' intentions and actions requires aligned efforts from all stakeholders in the entire fashion ecosystem. It takes many, not just two.

From "It takes two" to "It takes many"

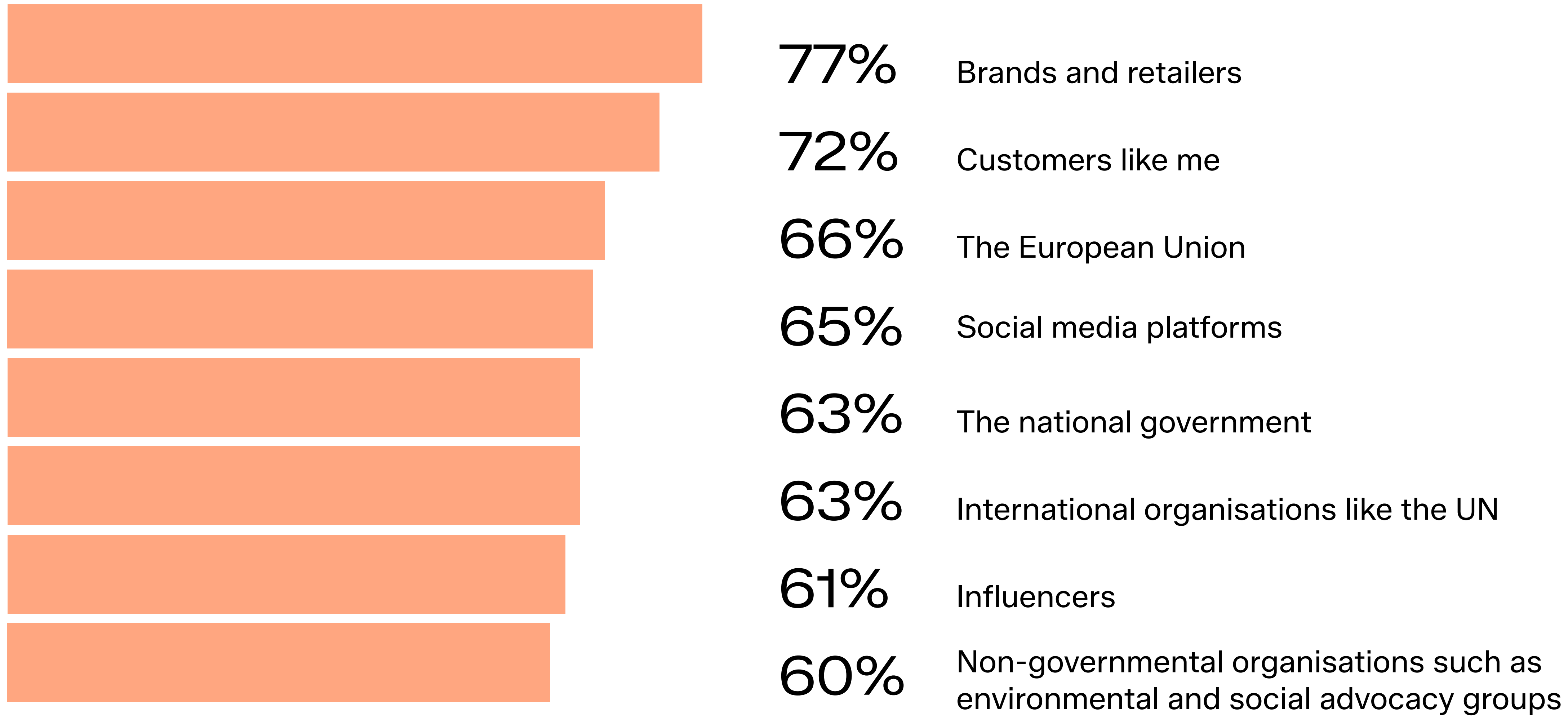
With key barriers preventing consumers from realising their aspirations to make more sustainable purchasing and wearing decisions in fashion, it is clear that closing the attitude-behaviour gap requires more than just efforts from retailers/ brands and consumers. It necessitates the collective action of many actors to create the enabling conditions for positive change.

When asked who they hold responsible for helping them realise their aspirations for more sustainable fashion, consumers tell us the responsibility is indeed shared across the entire fashion ecosystem, with many actors having a role to play.

Consumers overwhelmingly expect brands and retailers to do their part (77%), almost as much as they consider consumers like themselves to be at the heart of the change (72%). However, they also look to the European Union (66%), national governments (63%), social media platforms (65%), and influencers (61%) for support. Civil society, such as NGOs (60%), is also expected to play its part.

The message from consumers is clear – it does not just take two, but many.

Consumer perceptions on who is responsible to help



Q. How much do you hold each of the following responsible to help you change the way you buy and/or wear fashion items to be more sustainable? – "a great deal" + "a moderate amount." *Subsample: All who want to change their behaviour n*=3,579–4,755

"We are committed to driving the change within the fashion industry. However, driving change at scale requires collaboration from all parts of the industry.

No matter the role within the fashion ecosystem, everyone needs to make sure that they are contributing and encouraging others to do the same."

Leyla Ertur
Chief Sustainability Director, H&M Group

It takes many: How each actor across the system can contribute

To drive real progress, a concerted and multifaceted effort is needed, bringing together industry players, policymakers, social media platforms, influencers, and other key stakeholders. Crucially, this effort must aim to support and enable consumers, rather than placing the burden solely on them.

Through our quantitative survey and follow-up qualitative interviews, we explored what consumers expect from each of these actors. We also invited industry experts to share their perspectives and ideas.

Drawing on these insights, we present below and on the next pages what we hope can serve as an initial collective roadmap for change.

Retailers and brands

Consumers expect brands and retailers to deliver a wide range of actions, which can be summarised as making more sustainable fashion accessible and the default choice across their entire customer journey, alongside focusing on transparency and providing actionable guidance to inform day-to-day consumer choices.

Actions for brands and retailers to take

Q. You said you would like brands and retailers to help you. What actions should they take to enable you to change how you buy and/or wear fashion items to be more sustainable? – select all that apply. *Subsample: All who think brands/retailers should help n=*4,363

In consumer and expert interviews, we delved deeper into the concrete actions retailers and brands are expected to take:

Make more sustainable fashion the default choice and highlight value to consumers

Brands and retailers are expected to ensure that fashion items are more sustainable by design, both in terms of what they are made of (e.g. items made with recycled, organic, or biodegradable materials, or items designed for durability and longevity) and how they are produced and delivered to consumers (e.g. under environmentally and socially responsible conditions). Retailers are also expected to curate the best possible assortments of more sustainable items for consumers.

Within this, it is key to address the price premium challenge: either through innovation, or when not possible, by highlighting benefits that consumers are willing to pay extra for – whether this is the product's durability, style, etc., depending on the consumer group that is being targeted (see the next section on what's next with consumers). However, given the pressure from low-cost, ultra-fast fashion, more support from governments and the EU is needed to level the playing field and offset the price premium.

"I think the main responsibility of the brand is to offer more sustainable choices in their clothes and to make sustainability more attractive through their messaging on social media."

Ilona
Germany

"The understanding of value is key, whether it's value for money or the perceived value in a broad sense. And at a time when there's still a degree of cost pressure and economic uncertainty, you want to focus on value. The brands that offer the best value stand to win."

Francois Souchet
Founder & Managing Director, Swanstant

Support consumers all along their journey – not just at the point of sale

More sustainable fashion goes beyond buying more consciously; it also includes extending the life of items through repairing, renewing, mixing and matching, and caring for clothes. In these areas, consumers are looking for education, guidance, and new tools to engage differently with their wardrobes.

Brands and retailers are also expected to engage consumers at the end of a product's life cycle and focus on improving the collection of old items that are no longer wanted – another area where collaboration with governments is needed to help make this a reality on the ground.

"I don't think the information is readily available. It would be nice to have a reliable source of information on how to care for the items I already own."

Marilyn
Sweden

"We now have a product either resold, brought back into the supply chain, or sent to landfill. We don't want it sent to a landfill, but the infrastructure to take it back from the consumer and reintegrate it into the supply chain isn't in place.

Companies are starting to invest in this, but I think retailers also have a responsibility. How do they help collect products when consumers don't want them anymore? How do retailers and brands get involved in end-of-life?"

Andrew Martin
Executive Vice President, Cascale

Normalise second-hand shopping

Integrating resale and other circular options into the main retail experience is critical to ensure they are not treated as a separate or lower-status offering. Some consumers we interviewed in qualitative interviews stated that they prefer buying second-hand from retailers over peer-to-peer platforms, as they view it as a sign of security that their clothes (or the ones they purchase) will be handled with greater care and quality assurance than by individual sellers.

"If many retailers and brands can start offering pre-owned assortments, if they can start incorporating the idea of this pre-owned shopping and normalise it. [...] I personally feel that when a retailer does it, they are compliant in washing and cleaning it in a way that makes it ready for you, right? As a person, and as a private seller, I might not wash it in the best way... Well, it's a matter of trust. I would trust the retailers and brands more if I bought pre-owned items from them."

Tanvir
Sweden

"How do we make it aspirational for consumers to keep items, to repair them, to buy them second-hand as opposed to constantly buying new and disposing of pieces?

This needs to come first and foremost from the brands and retailers – both in terms of the access they provide to these services, but also through recognising the power and responsibility they have with their marketing to not just push more sustainable items, but to push sustainable behaviours and values as a note of aspiration or desire."

Rachel Arthur
Independent Sustainable Fashion Strategist

Harnessing the fashion industry's creativity to appeal to both the "head" and the "heart"

The fashion industry excels at understanding consumer aspirations and responding with creativity. By leveraging this strength, retailers and brands can empower consumers to make more sustainable choices by combining data with aspirational messaging. This approach requires investing in robust, verified, and science-based data collection methods. Additionally, it means making more sustainable behaviours, such as buying second-hand, repairing, and preserving items, not just practical but aspirational.

The fusion of data-driven insights with aspirational messaging is essential for driving wider adoption and building momentum around more sustainable practices.

However, recent regulatory changes are making this increasingly difficult. As a result, many brands and retailers may be tempted to embrace "green hushing" – a trend that poses its own risks and demands proactive engagement from policymakers.

From volume to value

Our research shows that 46 percent of consumers report having bought more clothes than they needed in the past 12 months. Overcoming this trend requires more than just changing the narrative or nudging consumer behaviour – it demands a fundamental shift in how fashion is planned, marketed, and sold.

Brands and retailers are expected to embrace new business models that prioritise quality over quantity and continue to invest in services like repair, resale, etc. Fashion as a service offers exciting opportunities to decouple style from over-consuming while still inspiring self-expression and newness.

"I think as brands or retailers, we can do much more. Maybe we can continue our consumer journey without always selling a product? Can we sell a service or an experience? So, this would be almost like decoupling growth. I think there's an opportunity there."

Begüm Kürkçü
Global Senior Director of Sustainability, On

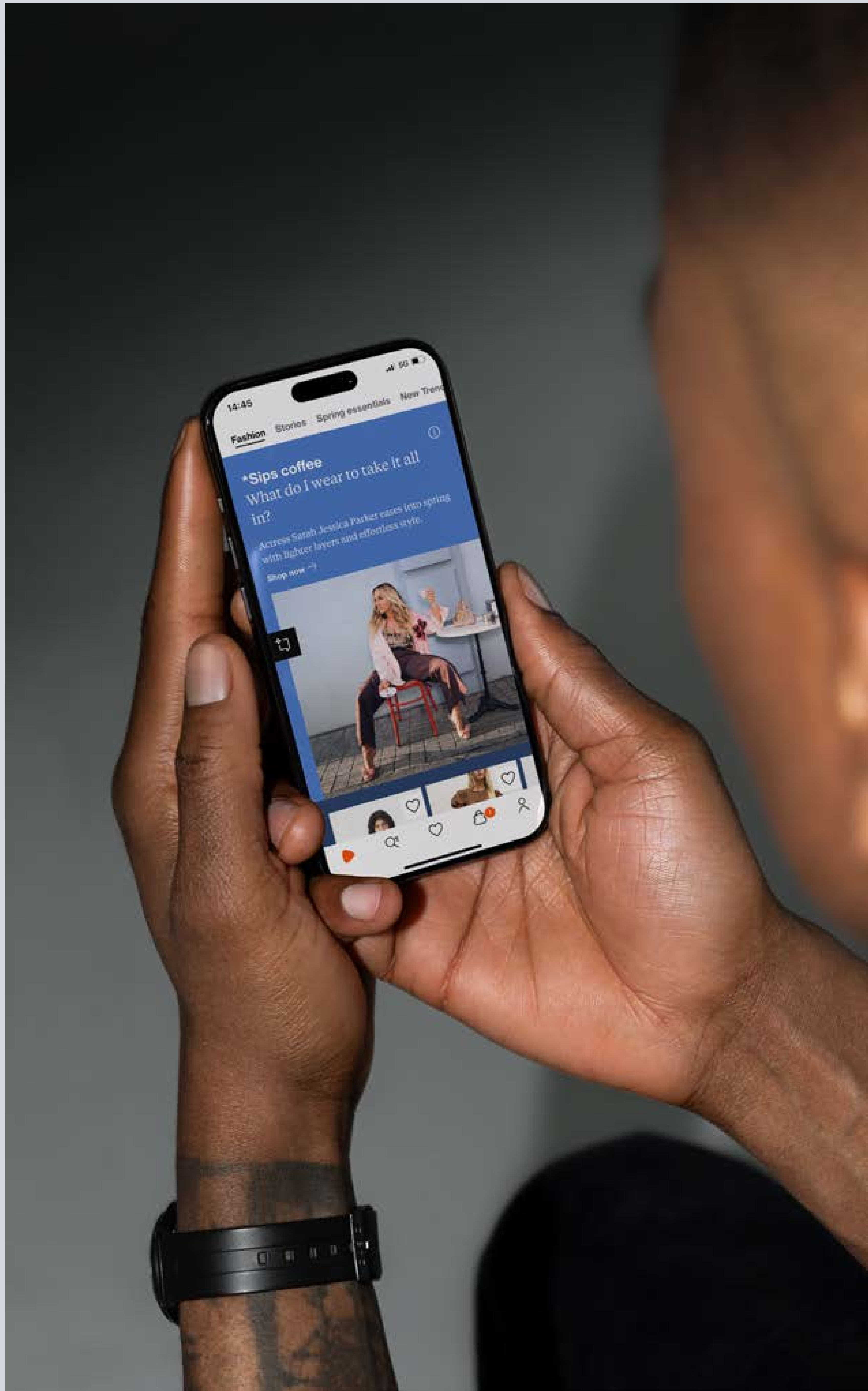
How do we respond to these expectations at Zalando?

We acknowledge that our industry significantly contributes to environmental and social challenges. However, we are committed to being part of the solution. We recognise the urgent need for change and are committed to transforming our practices to foster a more sustainable future.

As part of that, we are committed to achieving Net Zero by 2040 for our own operations and private labels, and by 2050 for our remaining value chain emissions. A key milestone in our Net Zero strategy was reached in May 2025, when the Science Based Targets initiative (SBTi) validated and published our near-term targets.

We are committed to maximising our impact by leveraging our strengths to help fashion brands and suppliers achieve their own sustainability ambitions. As part of that, we are leading the FASHION LEAP FOR CLIMATE initiative, together with YOOX Net-a-Porter, About You, ASOS, BOOZT and Selfridges Group and Cascale. Launched in 2022, the platform is designed to elevate the fashion industry's response to the inherent climate challenges it faces. It supports fashion brands in learning how to measure their carbon footprints and set targets in line with climate science.

At the same time, we are committed to continuously supporting our customers on this journey. We know we don't get everything right, but customer research – such as the insights behind this report – is helping us understand how to better reconcile our customers' desire for novelty and trends with their values around environmental and social responsibility.



A glimpse into our initiatives for customers

This year, we are pursuing the following customer-focused initiatives:

Continuing to innovate with our private labels

We are committed to phasing out conventional polyester and cotton in our private labels by 2033. We will source preferred material options, including recycled for polyester and organic, regenerative and recycled for cotton, among others. To make this change, we are further incorporating material innovation to our own brands, such as Anna Field, Even&Odd and Pier One, and working closely with innovators and suppliers to make scaling of these materials viable in the long term.

Highlighting our more sustainable assortment

We are actively working with our own Private Labels and our partners to increase the availability of products that are more sustainable. To support our customers in making informed choices, we are working to make these products easier to discover, providing clear, transparent information in line with anti-greenwashing standards and evolving regulations.

Enhancing our recommerce offer

We are expanding our Pre-owned offering to give customers more opportunities to buy and sell second-hand items. This includes broader selections – such as children's wear – and greater market coverage.

Decarbonising packaging, transport, and delivery

We believe in the power of collaboration to drive meaningful change. Consequently, we work with our partners across the supply chain. When it comes to packaging, we continuously improve our portfolio and test new materials, aiming to minimise weight, and reduce both material use and waste. For example, we have recently fully transitioned from plastic to paper shipping bags. We have also committed to sourcing 100% of our packaging from recycled or certified sources (FSC or Blauer Engel verified sources). In transport and delivery, we collaborate closely with local partners, to enable them to set and achieve their sustainability targets.

Reducing size-related returns through technology

Facing the complex challenge of varying sizing across 6,000 fashion brands for our nearly 52 million customers, we leverage our extensive experience and data, including size recommendations based on purchase and return history enabled by human expertise and technology, such as AI and computer vision, among others. Recognising the positive impact of accurate sizing on customer experience, return rates, and sustainability goals, we established a dedicated size and fit team eight years ago to solve this challenge for our customers and collaborate with brands on addressing it, helping them to digitising their processes.

Based on our own experiences (including Virtual Fitting Room pilots), we know that the use of data can have a positive impact on the customer experience: helping them to make more informed decisions, reducing size-related returns, and overall, increasing engagement with them as well as improving order economics. In addition, most brands have ambitious sustainability goals or aspirations, and reducing returns can contribute to achieving them.

The EU and national governments

Consumers expect the EU and national governments to support them in various ways, just as they have a wide range of expectations of brands and retailers.

Set the right conditions to make more sustainable fashion mainstream and accessible

Four in ten consumers (42%) expect the EU and national governments to lower taxes, such as reducing Value Added Tax (VAT) on more sustainable fashion. This could be achieved through targeted taxation policies, including reduced VAT for businesses operating under circular business models (such as repair and recycling activities), or an adapted VAT system for second-hand goods.

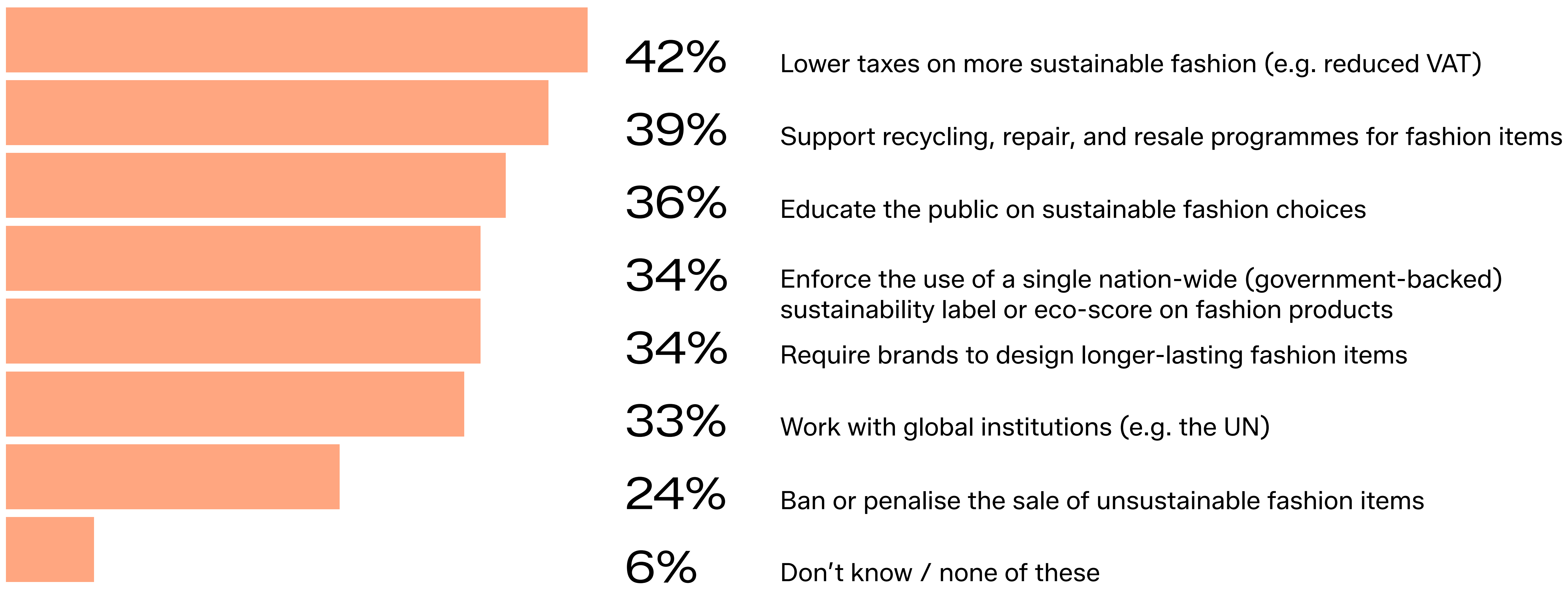
Additionally, consumers look to governments to support repair, resale, and recycling programs (39%), which could involve incentivising investment in recycling facilities. Consumers also expect governments to drive educational initiatives that teach more sustainable fashion choices (36%), from purchasing to wearing.

This aligns with the growing expectation for brands to design longer-lasting fashion items, with 34 percent of consumers supporting this approach. Interestingly, consumers seem to favour positive incentives from government over punitive measures. Twenty-four percent expect governments to ban or penalise the sale of unsustainable fashion items, such as the disposable pieces often seen from ultra-fast fashion players.

"I'm prone to pay more when it comes to a more sustainable item, but I realise it is something that doesn't make more sustainable fashion accessible for all. Maybe there is something that can be done in terms of policies. It is up to governments to try to do something to reduce the cost of more sustainable fashion."

Anita
Italy

Actions for government to take



Q. What actions should the government and/or the European Union take to help you change the way you buy and/or wear fashion items to be more sustainable? – select all that apply. *Subsample: All who think government should help, n=4,252*

Develop a simplified sustainability label or eco-score for fashion products

Those who want an EU- or government-backed sustainability label or eco-score on fashion products (34%, see the previous page) indicate that they primarily seek a simplified score summarising a product's sustainability aspects (versus 28% who want detailed information and 19% who want both simplified and detailed information). This presents an opportunity to establish a unified, straightforward EU-wide methodology for evaluating and communicating claims about fashion items – one that is trusted, verified, and easy to understand and one that would help fill the information gap currently preventing consumers from realising their aspirations to make more sustainable purchase decisions.

34%

want EU- or government-backed sustainability label or eco-score on fashion products

→

Of those who want this label/eco-score

51% want a simplified score summarising the sustainability aspects of a given product

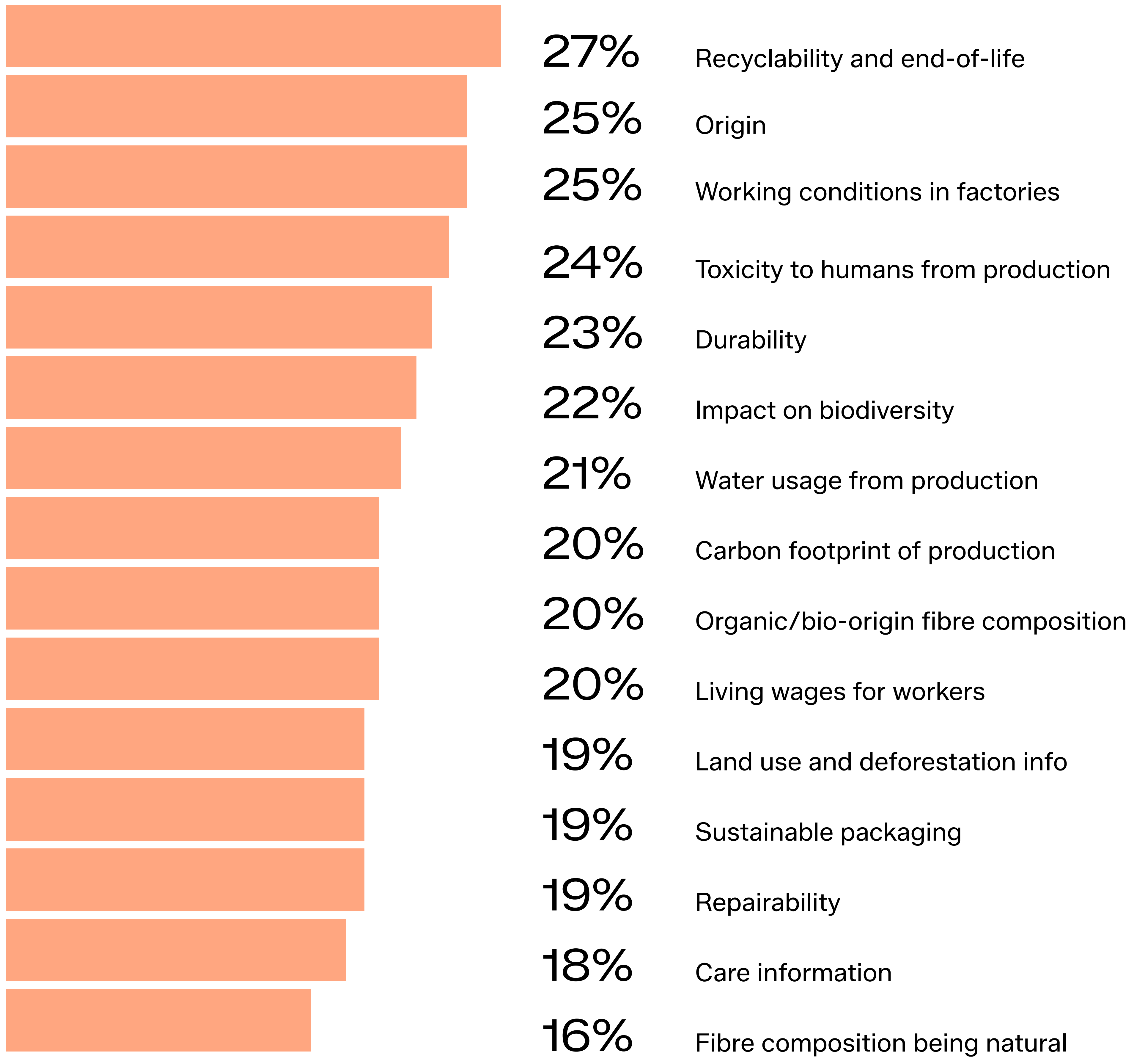
28% want detailed information about the product's sustainability aspects

19% want both

2% don't know

Specifically, consumers would like such a label or eco-score to cover, and simplify for them, a range of aspects at both the product and brand levels. However, this can only work if claims are established using only validated and proven scientific methods, ensuring consistency, comparability, and reliability of product information.

Top 15 components consumers want a fashion eco-label/eco-score to show



Q. Which aspects of a fashion product would you like to see covered by this new labelling / eco-score approach? – select up to five. *Subsample: All who said they wanted detailed information on an eco-label n=674*

"There should be only one real big certificate [...] When it is really good for the environment, it would get a 5/5, when it is not so good for the animals or the environment, then it would get a 1/5 [...] And it should be certified by the government or some trusted NGOs, not the producer or the brand itself"

Josef
Germany

"A universal sustainable certification would be the best way to identify a more sustainable item, and this would mean we can validate sustainability claims made by brands. The certification is up to the national governments or the EU, in my case, to develop."

Anita
Italy

Beyond labelling, allowing retailers and brands to communicate about more sustainable fashion

Consumers are looking for guidance and information on all things related to more sustainable fashion – from knowing more about brands' social and environmental practices to receiving practical tips on how they can wear and keep their fashion items for longer. While anti-greenwashing regulations have played a key role in promoting honest communication, it's important to ensure they don't unintentionally hinder the ability of brands and retailers to share meaningful information about more sustainable fashion.

Enabling access to better data is key to accelerating sustainability progress

Brands and retailers require more comprehensive, standardised data on material choices, product durability, and environmental performance to make informed sourcing decisions and improve consumer transparency. The upcoming secondary legislation on the Ecodesign for Sustainable Products Regulation (ESPR) and the Textile Labelling Regulation (TLR) present a valuable opportunity to expand data requirements, empowering the industry to scale more sustainable practices and strengthen trust through clearer, evidence-based communication.

Continue to engage at the international level to advance global standards

Fashion is a highly globalised industry, with supply chains and environmental impacts spanning continents. It is essential for regional and national governments to continue to actively engage with the United Nations and other international bodies to shape harmonised sustainability standards, promote responsible business conduct, and ensure a level playing field across markets. Global collaboration, with the support of brands, retailers, industry groups, and coalitions, can help accelerate progress, reduce fragmentation, and drive more consistent and credible action throughout the value chain. This is all the more important in today's fragmented geopolitical order.

"Right now, marketing teams have little incentive to embrace sustainability — largely because brands have been repeatedly called out, often justifiably.

But when companies can't communicate their progress, scaling sustainability efforts becomes incredibly difficult."

Philipp Meister
Global Lead for Fashion & Chemicals, Quantis

Social media platforms and influencers

A majority of consumers (65%) also look to social media platforms to help them realise their more sustainable fashion aspirations, with a similar proportion pointing to influencers themselves (61%).

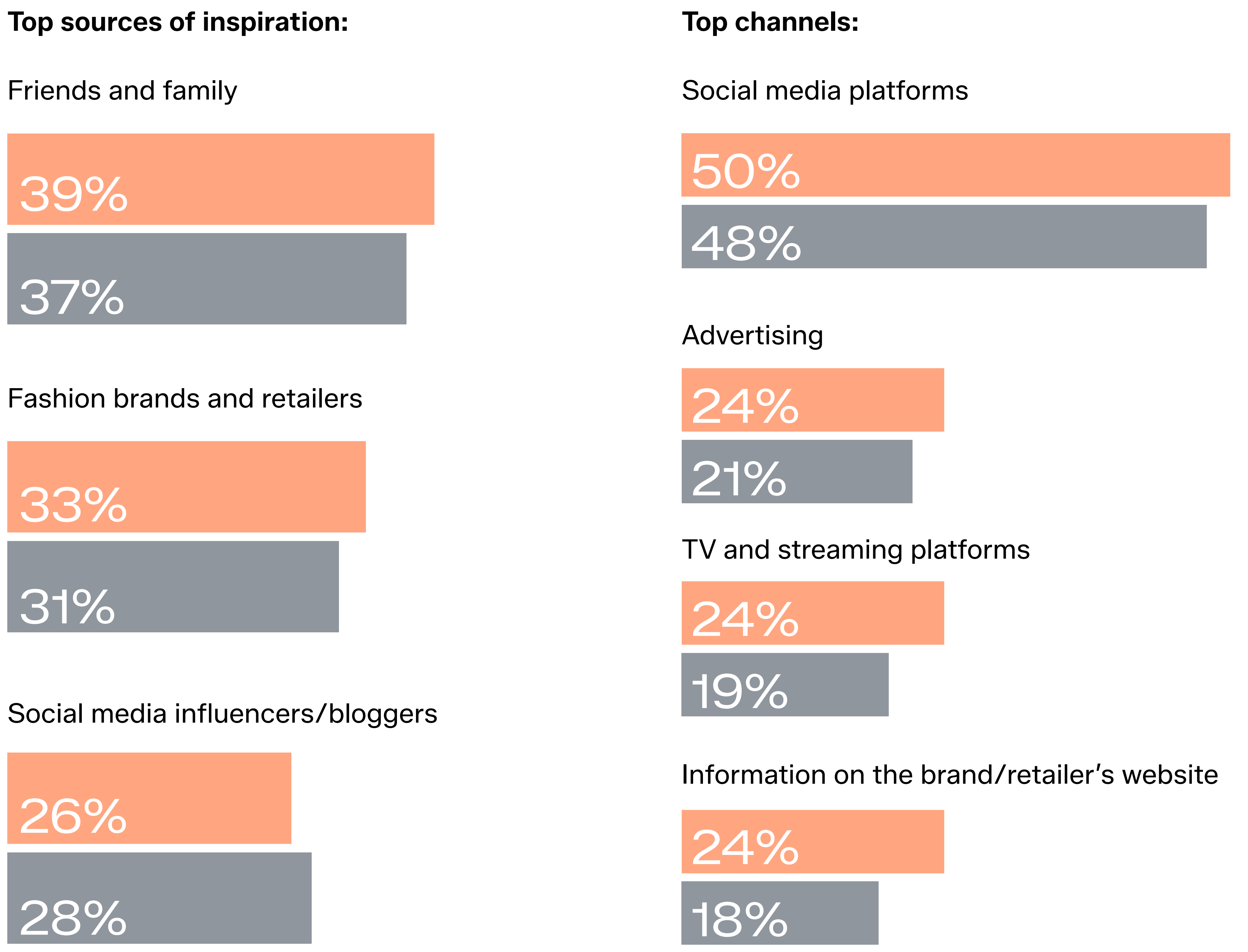
Additional survey data show that social media influencers are among the top sources of inspiration for either more sustainable or conventional fashion choices (alongside friends and family and fashion brands/retailers), with social media platforms being a key channel where consumers find this inspiration.

Consumers and experts we spoke to highlight the key role of social media (and media more generally) in moving consumers when it comes to doing the following:

Make sustainability socially acceptable – and stylish

Choices that are more sustainable do not need to scream "eco" to be heard. The more we use language and aesthetics that resonate with the most trend-driven audiences and collaborate with other creators to amplify these choices as part of a desirable, stylish lifestyle, the more they can catch on. Rather than making sustainability the headline, weave it into the narrative: "Repaired an old fave" or "Clean out your closet and make a little money." When second-hand, vintage, and ethically made pieces are styled in a way that feels current (think capsule wardrobes or quiet luxury), content can effectively signal that fashion and sustainability are not mutually exclusive — they are a power duo.

Top sources of inspiration and channels for more sustainable and conventional fashion choices



More sustainable fashion inspiration
Conventional fashion inspiration

Q. Thinking about where you get [sustainable] fashion inspiration, who has the most significant impact on your [sustainable] fashion choices? – Select all that apply. *Subsample: All who have purchased/worn sustainable fashion items in last 12 months n=3,312; All who have not purchased/worn sustainable fashion items in last 12 months n=1,336* Q. Which platforms or channels do you get the most [sustainable] fashion inspiration from (e.g. ideas, guidance, etc.)? – select all that apply. *Subsample: All who have purchased/worn [sustainable] fashion items in last 12 months n=3,312; All who have not purchased/worn sustainable fashion items in last 12 months n=1,336*

Shifting followers from fashion quantity to quality

Pieces that last are crucial, and social media platforms and influencers can help their audience understand why that matters. There are many possibilities: walking followers through what makes a garment high-quality; the fabric, stitching, fit, and how it holds up over time; or sharing how we can care for clothes to extend their life such as using gentle cycles, air drying, and proper storage.

Unboxing? Make it mean something

Unboxing videos are still gold – and they are a perfect chance to spotlight efforts to decarbonise packaging and last-mile delivery. Whether it's new materials, aiming to minimise weight or reducing material and waste these core aspects of more sustainable packaging matter. Influencers can put forth brands and retailers that get it right and show their audience what a more sustainable last-mile delivery can look like.

"I haven't heard any influencers talking about sustainability (in fashion). [...] I don't hear or see alot of people on social media talking about sustainable fashion, or any of my friends talking about buying something because it is sustainable. It seems like everyone thinks that their little choices dont have much of an impact"

Francesco
Italy

"I find most of my inspiration from YouTube channels rather than from what people wear on the street. It's convenient to see what people are buying, not just in France, but in other parts of the world as well. However, people on YouTube do not speak much about sustainable fashion; they tend to focus more on size, variety, fabric, or whether something fits properly. [...] I like to see someone wearing the items I am considering buying, so I don't end up with any unpleasant surprises."

Anna
France

"It's not just about the content, but it's also the visuals and the anecdotes. It's driving consumers toward a tangible action they can take to start engagement. If you look at viral grassroots campaigns like Movember and the Ice Bucket Challenge, for both, there was something individuals needed to do. It was fun. They could film it. They could see the responses, and then it resulted in positive action because they were actually raising money for medical research.

So, I think it's not just about inspiring content; there's a methodology to effective communication that can drive consumer behavioral change. We should learn from these examples and try to replicate them in our own industry."

Christine Goulay
Founder and CEO, Sustainabelle Advisor Services

And many more actors can contribute

Consumers also look to international organisations (63%) for their ability to drive global policy development, establish industry-wide sustainability standards, and foster cross-border collaboration, as mentioned earlier.

They also expect non-government organisations (NGOs) to play a role (60%). NGOs can help shape the cultural narrative and social norms around fashion and sustainability, advocate for policies that create a level playing field, and collaborate with business to develop innovative solutions to our industry's toughest challenges.

And there are many more actors than we can possibly list in this report – ranging from independent certifications and labels to industry coalitions, start-ups, and other change makers.

No single group can solve these complex issues alone; the industry can only move toward a more sustainable future through collaboration and systemic action.

"So, our big dream is to see the fashion industry systemically change so that it contributes more to people and our planet than it takes away. We want to embrace the fashion industry as we believe it is rich in creativity and ingenuity. We aim to collaborate with fashion players to transform the industry so that it can be a positive force for good, rather than a negative one.

We believe that it can happen, but it will require a lot of collaboration. Change won't come from one individual, one company, or one business. It will take pre-competitive collaboration, knowledge sharing, and collective action."

Federica Marchionni
CEO, Global Fashion Agenda

And consumers?

We see from this research that consumers want to act, and we are here for them, not to tell them to love fashion less, but to help them realise their aspirations for more sustainable fashion, along with the contribution of the many other actors they look to.

To best help consumers, we believe it is essential to understand them better, starting with where they are, rather than where we or they wish they were.

"I would like to see some tips from the retailer about how to look after my clothes that I bought, maybe a few months after I bought them, things like how to wash, or clean my shoes to make them last longer. [...] Our generation consumes a lot and I think more than we need to so it would be great for brands and retailers to provide more messages around how to look after our clothes so it's better for the planet."

Ilona
Germany

What's next with consumers? Taking a more consumer-centric approach

The three key takeaways

1

Various motivations and challenges

Consumers recognise their own role in driving positive change, but they are not a single, uniform group. Their motivations, sources of inspiration, and barriers related to more sustainable fashion vary widely, from seeking deals and expressing their personality to filling gaps in their wardrobe or aligning with their values.

2

Meeting consumers where they are

Effectively enabling consumers to make more sustainable fashion choices means engaging with these diverse motivations and challenges. It means, for all actors of the fashion eco-system, meeting consumers exactly where they are, not where we assume they should be.

3

Four different consumer segments unveiled

Our research uncovers four distinct consumer segments that reveal this diversity: *Fashion First* (prioritising style and trends, representing 37% of consumers interviewed), *Conscious Curators* (trying to balance fashion and sustainability, 21%), *Mindful Minimalists* (believing that less truly is more, 23%), and *Indifferents* (not engaged in fashion and sustainability, 18%).

Connecting better with consumers’ motivations and priorities

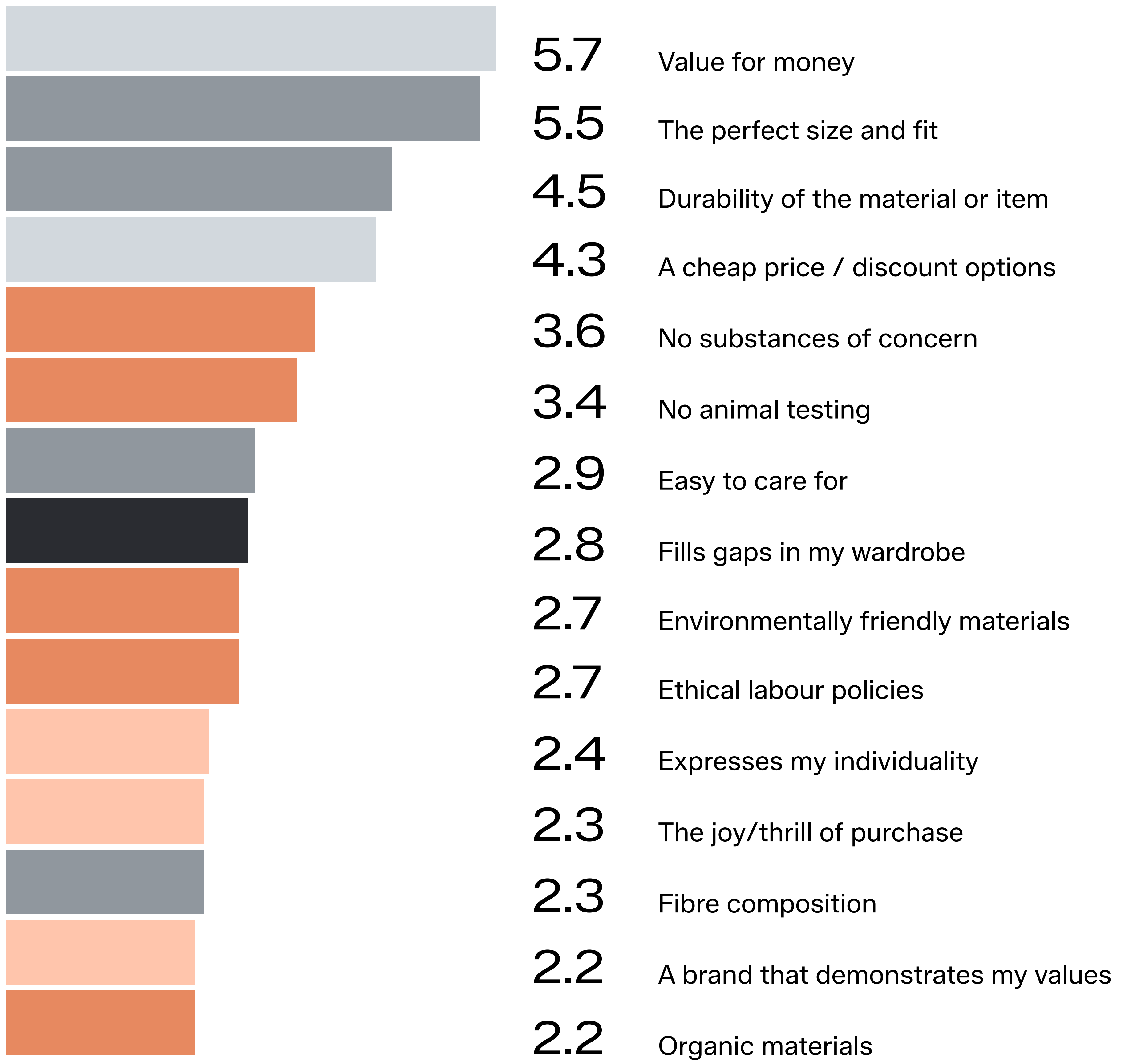
Fashion is more than what we wear. It reflects who we are, what we value, and how we want to be seen. Each consumer is driven by unique motivations, whether it’s a deal, the thrill of a new purchase, a gap in the wardrobe to fill, the desire to express individuality, or a commitment to values that resonate deeply. In some of the qualitative interviews we conducted, respondents were eager to share personal stories and little glimpses into their lives when asked to share their favourite fashion items, often revealing just how much emotional meaning these pieces held for them.

We need to start where people are, and not where we wish they were. Many consumers do not want a product that is just “more sustainable;” they want items that can reflect their identity, make them feel confident, or offer practical, cost-efficient solutions.

A look at the top drivers of purchase when shopping for fashion products offers a glimpse into what consumers are primarily looking for and where we need to meet them: value for their money, good size and fit, durability, and the assurance that their items will not harm them with concerning substances. But there is more beneath the surface that we need to take into consideration, with function, sustainability, style, cost, and emotional factors inextricably linked together.

By prioritising consumer needs beyond the topic of sustainability, we can make options that are more sustainable an aspirational choice, not a compromise.

Top 15 drivers of purchase when shopping for fashion products, importance scores*



- Sustainability
- Emotion
- Style
- Function
- Cost

Q. Think about when you shop: From each set of statements below, please select one you consider most important and the one you consider least important when purchasing fashion products. *Total sample n=5,013*

*Using an analysis technique called MaxDiff, survey participants were presented with a trade off exercise to choose which aspects were most and least important to them when purchasing fashion items. The higher the score, the more important.

Consumers are not all the same – Four consumer segments unveiled

Consumers are not a homogenous group either, so we developed a consumer segmentation model grounded in their attitudes and behaviours related to fashion and sustainability.

These segments offer a more nuanced view of consumers and provide a useful roadmap for all actors of the fashion eco-system who are expected to provide support and help.

Four distinct consumer profiles were identified, each with unique perspectives, priorities, and opportunities for engagement.

While segments might share common characteristics, each segment highlights elements that are more relevant to them compared to the others, as shown on the next pages.

Consumer segment sizes, based on attitudes and behaviours related to more sustainable fashion

Fashion First

37%

Conscious Curators

21%

Mindful Minimalists

23%

Indifferents

18%

Meet the *Fashion First* 37%

They are driven by style and self-expression, viewing fashion as a means to reflect their identity and status. They seek trendy, statement pieces from brands that align with their values. Fit, size, and durability matter, but these factors may take a back seat if a piece captures their interest. They trust what brands and retailers have to say – they see them, along with social media influencers, as tastemakers.

However, they feel priced out of more sustainable fashion, finding it inconvenient, limited in options, and lacking style. Scepticism and discouragement arise from a belief that individual actions don't matter, and that others are not trying either.

To engage them in more sustainable fashion, lead with bold style and appeal. Connect through inspiring content and influential voices they respect, rather than simple sustainability messaging. Build on their involvement in second-hand buying, reselling, and donating to decouple style and newness from overconsumption. This will make more sustainable choices feel less like a compromise and more like a win, reducing the guilt they often feel from overspending.

"I really like to be à la page. I really like to stay trendy; I don't want to be old-fashioned. I need people who look at me to get inspired by it, too. To see me wear something that they can wear too."

Swann
France

Meet the *Conscious Curators* 21%

They balance style and sustainability, choosing brands and products that align with their values, prioritising ethical labour practices and environmentally friendly materials. Value for money is crucial, but they believe that looking good should not come at the expense of the planet or its people. They seek durability and want to care for their loved items.

Trust is key, and they value sustainability certifications like Fairtrade or GOTS. But they generally struggle to align purchases with their values, finding it difficult to locate more sustainable fashion options or knowing where to shop for them.

To engage them in more sustainable fashion, provide credible information, clear guidance, and signposting through certifications and labels. Empower them with practical tips on how to wear their favourite items for longer, and reassure them that sustainability is about positive, meaningful changes over time, not perfection. Responsibly made fashionable clothes will attract them – focus on building a strong assortment to cater to their needs.

"We live in a world of finite resources, and we need to put a focus on sustainability in the fashion industry. It is non-negotiable that we start thinking in a more sustainable way when buying fashion items."

Tanvir
Sweden

Meet the *Mindful Minimalists* 23%

They value quality over quantity, embracing the mindset that less is truly more. They are not driven by trends but by functionality, durability, and environmental responsibility. Their wardrobes are carefully curated, with purchases made only when necessary and with long-term use in mind. For them, sustainability is not a buzzword, but a lifestyle.

They prioritise environmentally friendly and natural materials, ethical labour, animal welfare, and products free from harmful chemicals or microplastics. However, they often struggle to identify the more sustainable options and feel disconnected from the fashion world, finding it expensive and inaccessible. Value for money and discounts are key to their decision-making.

Brands that align with their values and make more sustainable fashion more practical (e.g. through clear guidance, free repair or alteration services, care tips, and incentives for long use) have the opportunity to build long-term loyalty with this segment. Just like for Conscious Curators, signposting more sustainable fashion (including via certifications) and providing guidance is key.

Meet the *Indifferents* 18%

For this group, fashion is functional. They are not driven by trends or causes, but simply want clothes that fit their needs: affordable, comfortable, easy to find, and long-lasting. Style and sustainability are not priorities, but neither are they points of resistance. Their choices are shaped by convenience, price, and practicality.

If they are to be engaged, sustainability must be seamless and baked into the product, as the message will not cut through. Durable fabrics, better value for money, and long-lasting comfort are what matter most. When more sustainable options align naturally with these needs, they are more likely to be embraced, not because they are ethical, but because they just make sense. Brands and retailers can leverage more sustainable "basics" items with this segment.

By considering consumers' priorities, aspirations, and barriers, we can more effectively support them in meeting their aspirations – again, through our collective effort as a fashion eco-system.

Conclusion

Conclusion

Four years after our inaugural "It takes two" report on the attitude–behaviour gap, we felt compelled to delve deeper and move beyond this persistent disconnect.

The research in this report reveals that more than seven in ten fashion consumers aspire to make more sustainable purchasing (71%) and wearing decisions (74%), but face key barriers in realising these aspirations.

Behaviour change happens when three things are in place: capability, opportunity, and motivation – the core components of the COM-B model, a widely used behavioural framework developed by psychologist Susan Michie and colleagues at University College London. According to this model, enabling more sustainable consumer choices in fashion requires giving people the ability, the opportunity, and the desire to act – and all three are essential for lasting impact.

Our research points to key avenues to unlock change at these three levels:

Build consumers' capabilities by closing information and guidance gaps: While many consumers are aware of sustainable fashion and are already taking action in key areas, a lack of clear and accessible information and guidance still hinders their ability to consistently act on their values. This is a challenge further complicated by a shifting and uncertain regulatory environment that makes it more difficult for brands and retailers to communicate clearly about sustainability.

Make the opportunities for sustainable choices more visible, accessible, and affordable by working with multiple actors across the fashion ecosystem: This requires aligning a broad range of actors – including brands, retailers, national governments and the EU, social media platforms, influencers, and civil society – to remove the practical and structural barriers that currently limit consumer action and our collective ability to unlock it.

Tap into and nurture motivation, recognising that consumers are not a monolith: A more consumer-centric approach means engaging with their diverse values, aspirations, and behaviours, not where we hope they are, but where they truly are. From the trend-focused Fashion First to the Conscious Curators who try to balance fashion and sustainability, tailored strategies are needed to resonate with the motivations of each group.

Enabling sustainable behaviour is not up to consumers alone. It is a shared responsibility that demands coordinated, sustained action across the entire fashion value chain. Only by acting together – and through a more targeted understanding of behaviour and what is needed to unlock it – can we begin to bridge the gap between intention and impact, and enable more sustainable consumer choices in fashion. It takes many, but collective action can enable us to unlock better value for business and society.

We invite everyone to engage in conversation, debate, and collaboration with stakeholders across the fashion ecosystem to help make this vision a reality. To turn these research insights into action, we will host a series of events and engagements in the coming months, involving all those who would like to contribute to this change.

If you have any questions, please reach out to your usual Zalando contact or email us at: sustainability@zalando.de

Our hunt for insights does not stop here

To gain a deeper understanding of Zalando customers' fashion and sustainability expectations and behaviours, we are conducting additional analysis using this research.

We administered the same set of questions from the online quantitative questionnaire to a group of Zalando customers through our Zalando Voices panel. By comparing these survey responses with these customers' actual shopping and purchasing behaviours on our online store, we aim to gain greater insights into their behaviours, challenges, and key barriers.

Aligning survey responses with real-world behaviour data will enhance the robustness of this study. This approach will help us identify crucial moments in the customer journey when customers engage with sustainability or require more support from us or other actors of the fashion ecosystem.

Appendix

Appendix

Quantitative online consumer survey

We interviewed 5,013 consumers across five key Zalando markets (France, Germany, Italy, Sweden, and the UK). Their responses to the survey were foundational to this research report, helping us go beyond the gap and uncover opportunities to make a positive difference.

Zalando market	Sample size	Fieldwork dates
Germany	1,001	14/2/2025 – 20/2/2025
France	1,001	14/2/2025 – 19/2/2025
Italy	1,002	14/2/2025 – 19/2/2025
Sweden	1,006	14/2/2025 – 26/2/2025
United Kingdom	1,003	4/2/2025 – 28/2/2025

Qualitative consumer interviews

We spoke to 11 consumers across France, Germany, Italy, and Sweden to go beneath the survey results and explore underlying perceptions about more sustainable fashion, barriers and levers to change, and expectations for help and support.

These 11 consumers helped us interpret our quantitative insights and articulate implications for the industry. They are:

Name	Zalando market
Ilona	Germany
Alice	Germany
Josef	Germany
Christian	Germany
Anna	France
Swann	France
Francesco	Italy
Anita	Italy
Tanvir	Sweden
David	Sweden
Marilyn	Sweden

Deep-dive expert interviews

We also interviewed 8 industry experts across the fashion ecosystem, including partner brands, industry associations, advisory consultancies, and independent experts, to gather their perspectives on our initial findings and their take on the implications for the fashion industry and its broader ecosystem.

Their input was invaluable – they are (in alphabetical order by surname):

- Rachel Arthur, Independent Sustainable Fashion Strategist
- Andrew Martin, Executive Vice President, Cascale
- Leyla Ertur, Chief Sustainability Director, H&M
- Christine Goulay, Founder and CEO, Sustainabelle Advisor Services
- Begüm Kürkçü, Global Senior Director of Sustainability, On
- Federica Marchionni, CEO, Global Fashion Agenda
- Philipp Meister, Global Lead for Fashion & Chemicals, Quantis
- Francois Souchet, Founder & Managing Director, Swanstant