FASHION REVOLUTION POLAND

HABITS AND PRIORITIES OF CONTEMPORARY FASHION CONSUMERS

IN CZECHIA, SLOVAKIA, HUNGARY AND POLAND

Visegrad Fund

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Fashion Revolution Poland in cooperation with Fashion Revolution teams from Hungary, Czechia and Slovakia, commissioned a survey of 4,000 people aged 16–75 in four Central European markets (Czechia, Hungary, Poland, Slovakia), related to whether and how much supply chain transparency and sustainability impacts consumers' purchasing decisions when shopping for clothing, accessories and shoes.

Currently, activist actions, policies and regulations are planned based on data collected from Western Europe. Our main goal was to verify these models of fashion consumption, as they vary significantly between the biggest EU member states and Visegrad countries.

Contemporary fashion consumption models are a threat. We need local data to influence local consumers, brands and decision makers and help them develop relevant policies.

The more detailed and recent the data, the clearer the path towards achieving this objective. This report will be another guidepost for rethinking the nature of fashion consumption, embracing new ways of engaging with fashion, calling on brands to implement business models based on transparent principles (about quality, not quantity), honouring (especially through decent wages) those who are already producing our clothes in an ethical way, as well as those trying to realise the full potential of the clothes that are already in circulation. With systemic and structural changes, a transparent and responsible fashion industry can bring people together and be a source of joy, creativity and expression – for individuals and communities.

4 000	16 – 75	04
RESPONDENTS	AGE RANGE	COUNTRIES

Understanding today's fashion consumer is a difficult, complex task that requires digging deeper and acknowledging the overall nature of contemporary consumers.

Our globalised modern reality is all about socially acceptable accelerated mass consumption, which, according to researchers, has already taken the form of: overconsumption, hypero-consumption or even turbo-consumption – consumption that satisfies secondary needs rather than real primary ones, often focused on acquiring a product because of the symbolic meanings it carries.
Concepts worth mentioning in the context of the said excess are: consumerism, compulsive shopping, affluenza, materialism and spontaneous shopping.

On the other hand, we observe the other face of consumption, which is the effort to re-evaluate and reduce it.
In this case, we can distinguish several types of consumers:

ECO-CONSUMER
= minimising waste and making choices that are as little invasive/harmful to the environment as possible

ETHNOCENTRIC CONSUMER
= choosing local products

CONSCIOUS / RESPONSIBLE / ETHICAL CONSUMER
= considering environmental and social factors when making purchasing decisions; aware of the interdependencies that occur in the supply chain on a micro and global scale

PROSUMER
= active involvement in the production processes, individualisation of products

COLLABORATIVE CONSUMER
= forgoing ownership in favour of using things, e.g., lending/renting/sharing

DECONSUMER/ASSERTIVE CONSUMER
= quantitative reduction of acquired goods, rationalisation, abandonment of materialistic lifestyle

The purpose of our research was to look at contemporary consumers from Czechia, Poland, Slovakia and Hungary and try to define the trends that can be observed among them.

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Head of Research Group
Fashion Revolution Poland

Purchasing decisions of consumers are based on psychological, social (environmental) and economic aspects.

Out of the above-mentioned factors regarding fashion consumption, the psychological aspects (motivations, needs, emotions or perception) of self-regulating individuals are ranked above all others. The consumer expects clothes, like other goods, to provide an experience of pleasure, to become a means of achieving life goals such as pursuing hedonistic desires. Also, the availability of goods, and therefore the ability to make choices, is an important tool for shaping consumption. In addition to supply, the aspects of income and prices are also treated as purchase considerations, creating general constraints on consumer behaviour.

Acquisition of goods, including clothing, can be described as a purchasing behaviour derived from needs and expectations, consisting of constant choices between available opportunities in a situation of limited resources. All the determinants of consumer purchasing decisions are analysed in detail and form the basis of strategic decisions, becoming the cornerstone for matching the offer to consumer needs and demands.

Nowadays, however, with potentially unlimited possibilities and **limited resources** (natural and those related to society) – more limited than means (as money or time for consumption), making choices seems incredibly difficult. Hence, the most important task is no longer market-matching the offer, but steering it wisely. Not forcing anyone to make some choices, but visualising any information useful in making the most economical decisions. The common goal of both: consumers and fashion brands, as well as decision-makers, should become economisation – and choose the most effective (best) actions among all the possible ones, given the goal set and the conditions that constrain that aim.

KEY FINDINGS

→ **WE DO CARE**
but mostly about ourselves.

→ **RECYCLED CLOTHING IS ON THE RISE**
losing to second-hand but way ahead fairtrade.

→ **WE DO NOT EXPECT TOO MUCH FROM OTHERS**
especially from the government and brands.

→ **DECLARATIONS**
are not reflected in daily choices.

→ **WE HAVE SOME KNOWLEDGE**
that needs structuring and deepening

Can we consider the results surprising or rather disappointing?

The answer is: it depends. Comparing the results of our survey with a similar consumer survey conducted by Fashion Revolution for Western European countries in 2020 (Germany, France, Italy, Spain and the United Kingdom), more respondents overall declare the inclusion of sustainable factors in their value system: environmental harmlessness (46% V4=Visegrad countries vs. 33% Western Europe), production without harming animals (48% V4 vs. 29% Western Europe), safe conditions for workers involved in garment production (38% V4 vs. 22% Western Europe) or decent pay for them (40% V4 vs. 33% Western Europe). However, the priorities of the interviewed residents of Western and Central and Eastern Europe are slightly different: for the Visegrad countries it is primarily the non-use of harmful chemicals in the production of garments (56% V4 vs. 37% Western Europe), for the 2020 respondents it is a factor related to forced labour (41% V4 vs. 45% Western Europe). The respondents also declare a more frequent choice of recycled (23% V4 vs. 11% Western Europe) and organic materials (18% V4 vs. 9% Western Europe). Locality is also gaining importance in declarations (22% V4 vs. 14% Western Europe). The overall picture of "circular behaviour" is shaping up to be similar, with more people declaring to repair clothes in 2023 (48% V4 vs. 40% Western Europe), but far fewer caring for clothes by washing them at low temperatures (23% V4 vs. 40% Western Europe). Fewer respondents also declared recycling or upcycling damaged clothes (20% V4 vs. 37% Western Europe).

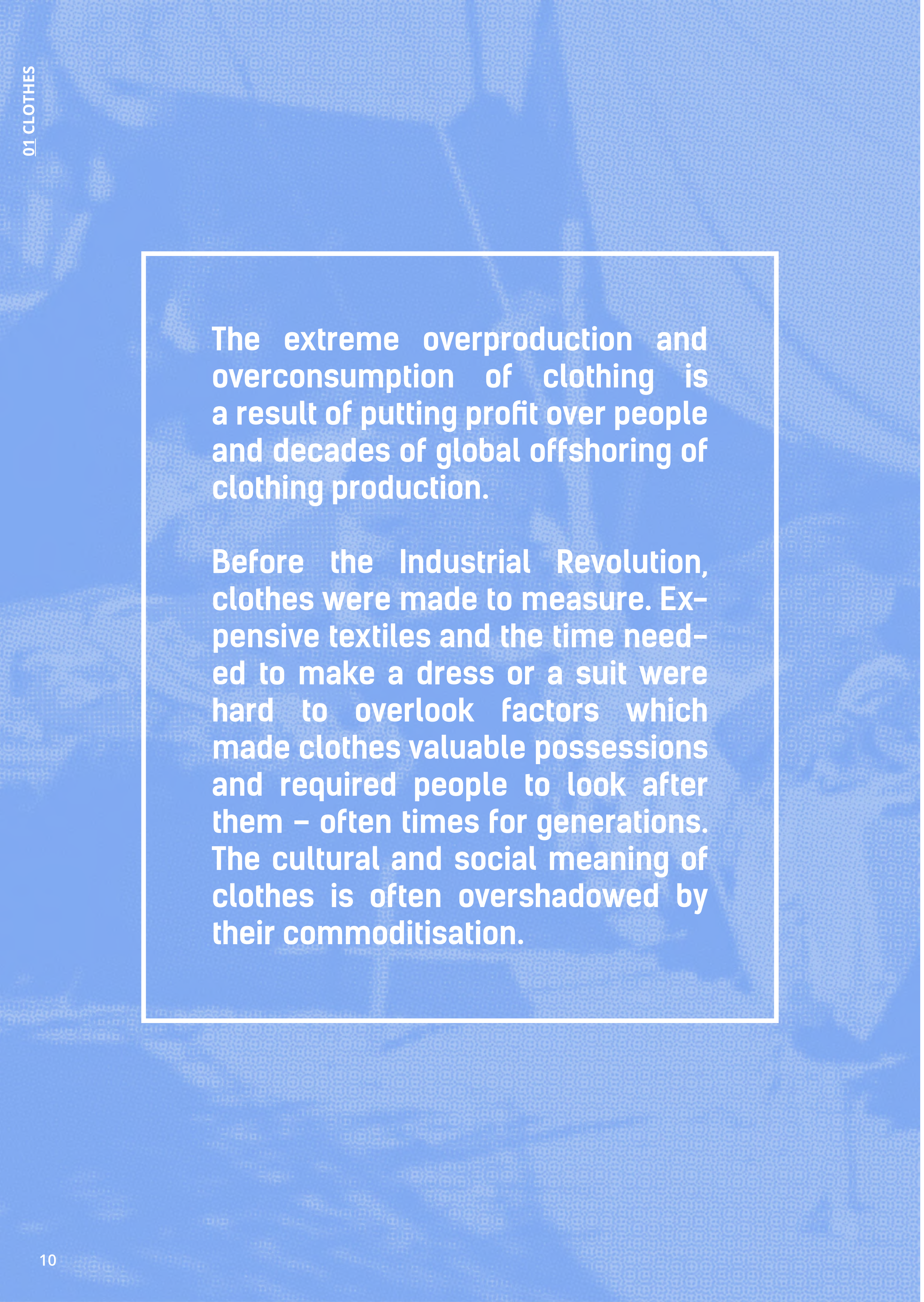
These declarations and sustainability values are not confirmed in the purchasing decisions of the last 12 months (at the time of data collection). Because they are not the purchasing determinant for the people of the Visegrad countries, but instead price (67% V4 vs. 39% Western Europe) and durability (46% V4 vs. 31% Western Europe) are. However, the research shows that second-hand clothing purchases have gained in popularity compared to the declarations of Western consumers 3 years ago (23% V4 vs. 14% Western Europe).
Governments' commitment to verifying the sustainability of brands or regulations facilitating ethical shopping is expected by almost 40% of respondents, but this is more than 30% less than in the corresponding case in Western European countries. Expectations of legislative solutions obliging brands to introduce more transparency are less than 37%, while in a survey three years ago almost 75% were in favour of changes in national and international law. A similar picture emerges from a comparison of expectations of voluntary actions by brands regarding the sharing of data on certification, environmental policies, returns and recycling, or ways to extend the life of clothes – these issues are highlighted by around 29% of the Visegrad population (with an average of 75% for Western countries). On average, 26.5% of respondents were interested in knowing about circular practices and closing the loop in the clothing sector (and 67% in the survey for the Western market). Without the above comparisons, it is satisfying to see that, on average, 30-40% of fashion consumers are expressing engagement in sustainability. It is by no means indicative of ignorance on the part of consumers.

It is clear, however, that above all consumers in Central and Eastern Europe expect affordable and durable (repairable, resaleable or recyclable) clothing. Importantly, they need support from brands and the government in the aspects of recycling, care of clothes and others related to circularity. The idea of sustainability is in this case directly connected to extended usability. What emerges from the results is a picture of superficial awareness which is not built on a real understanding of mechanisms and cause-and-effect dependencies. For consumers, what seems to be important first and foremost is the purchase and post-purchase product life. But **without consideration of the entire supply chain, there is no real opportunity to close the loop** of circular economy. This is a valuable insight for activist movements, especially as there is still much to be done.

01

Clothing (also known as clothes, garments, dress, apparel, or attire) is any item worn on the body. Typically, clothing is made of fabrics or textiles, but from the ancient past, it has included garments made from animal hides and other thin sheets of materials and natural products found in the environment. The wearing of clothes is mostly restricted to human beings and is a feature of all human societies. The amount and type of clothing worn depends on gender, body type, social and religious factors, and geographic considerations.

CLOTHES



The extreme overproduction and overconsumption of clothing is a result of putting profit over people and decades of global offshoring of clothing production.

Before the Industrial Revolution, clothes were made to measure. Expensive textiles and the time needed to make a dress or a suit were hard to overlook factors which made clothes valuable possessions and required people to look after them – often times for generations. The cultural and social meaning of clothes is often overshadowed by their commoditisation.

NICOLLE PROCHOWSKA

Research Group
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When it comes to modern consumerism, there is a rule to buy locally produced items – the so called **ethnocentrism**. However, study results negate this trend. It is either not there yet or not relevant for fashion consumers in Poland, Czechia, Slovakia and Hungary who don't see the need to purchase local products and therefore support the development of national economies.

In general, women are more environmentally conscious consumers of fashion. However, a higher percentage of men are ethnocentric consumers. The most conscious group are people between 25–34 years of age and with income above 1,000 euros, confirming that the mindset change has been happening only for a few years and within the younger generation.

Consumers in Poland, Czechia, Slovakia and Hungary do not demand clothing made of materials that are produced organically. The explanation could be that consumers do not understand the difference between organic and non-organic materials and are not aware of the environmental benefits of organic textiles. Moreover, consumers do not ask for recycled garments. Here, the perception of recycled garments is less favourable than the perception of linear fast fashion products and, as claimed by researchers, low price is a determining purchase factor. Furthermore, as mentioned by scholars, lack of knowledge and understanding of why textile recycling is essential supports the findings that customers do not buy recycled garments.

Whereas there is a statement that one of the most crucial factors for Polish consumers is fair production, to the respondents of the study conducted by Fashion Revolution it is less important than production without using harmful chemicals.

57% **of people in age 25–34 agreed it's important that the clothing they buy is produced without harming animals.**

26% **of people with income above 1000 € iof people said it's important that the clothing they buy is produced locally.**

"We live surrounded by cloth. We are swaddled in it at birth and shrouds are drawn on our faces in death. We sleep enclosed by layer upon layer of it (...), when we wake, we clothe ourselves in yet more of it to face the world and let it know who we shall be that day."

Passage from the preface to The Golden Thread. How fabric changed history
by Kassia St Clair

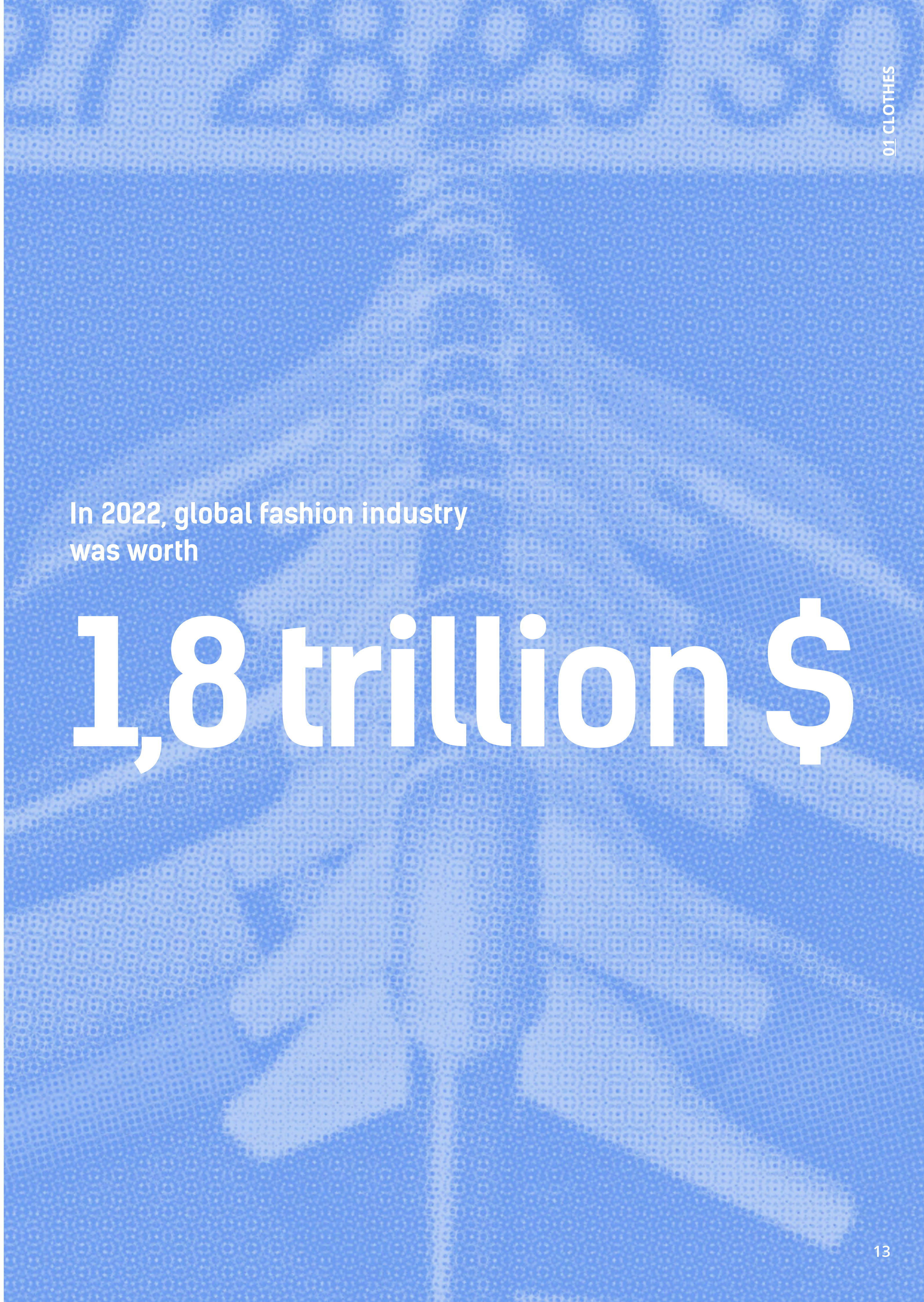
Clothes are embedded in our lives as tools for daily communication with the world.
As long as we wear clothes, we are users of fashion and participants of a global industry that in 2022 was worth around 1.8 trillion dollars.
From the moment of birth to the moment of death, our bodies are in a constant relationship (physical and psychological) with textiles. In the process of production carried out by people collaborating with machines, cut flat pieces of woven or knitted material change into many things, also conceptual ones: a uniform, a protective cover, an adornment, or an expression of political views. The skin – our biggest organ – is constantly in touch with mostly synthetic textiles that aren't breathable.

By law, we are obligated to cover our bodies, otherwise we can be accused of depravation. Now, we are working on influencing regulations on how the clothes we are expected to wear as part of society are being sourced, produced, distributed and discarded without violating human rights, such as decent work conditions, good pay or access to fresh water. Our shopping habits and ways of interacting with clothes are meticulously analysed and tracked. We influence the clothing industry each time we engage with the content of our wardrobes. But we also participate in the fashion system through looking after clothes and deciding how to handle them at the end use.

"Clothes are our chosen skin. We communicate who we are, to a certain extent, through clothing. It is fundamentally a part of what we wish to communicate about ourselves to the World." [1]

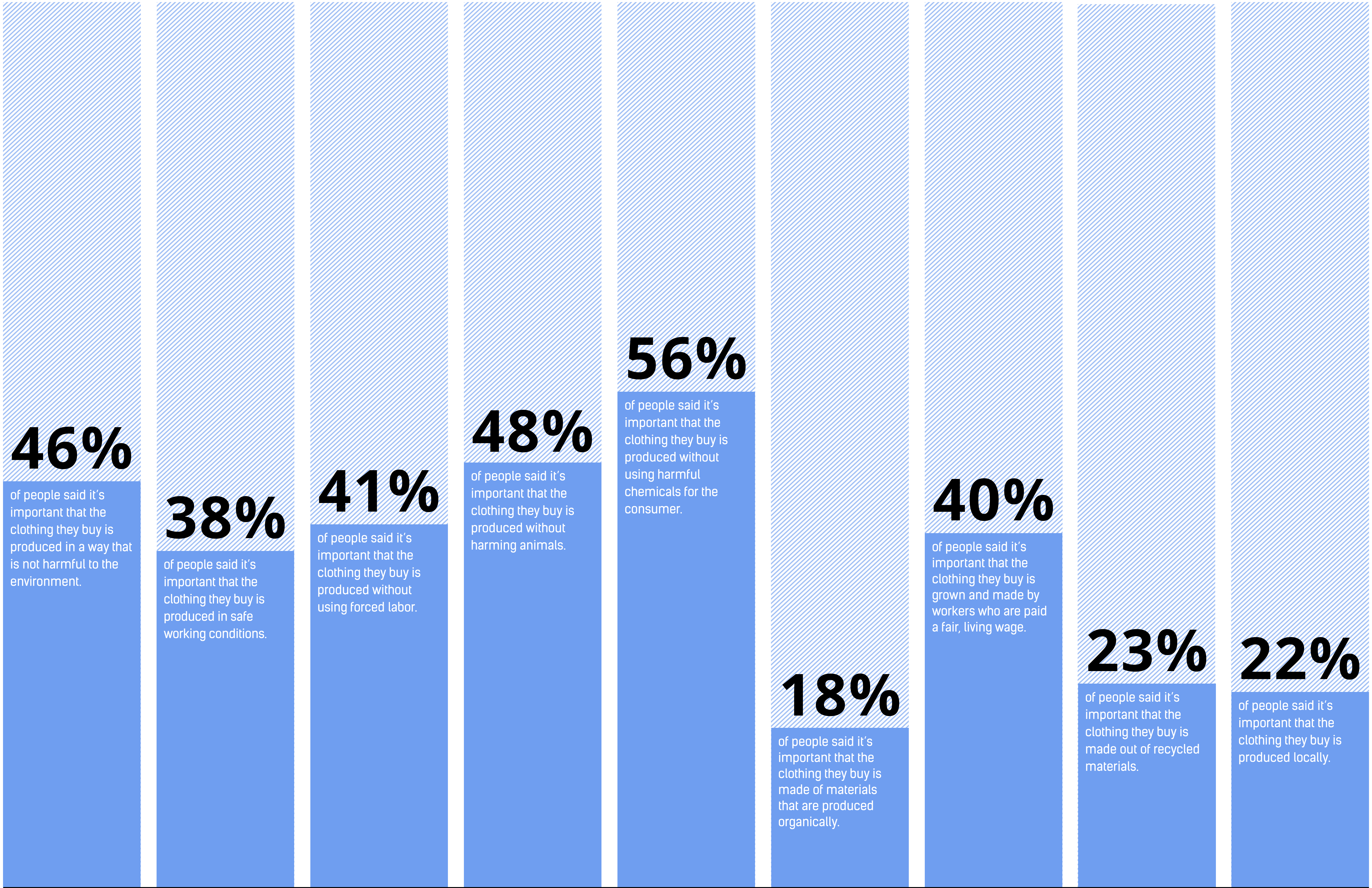
26% **of people in age 16–24 said it's important that the clothing they buy is made out of recycled materials.**

1 Orsola de Castro, co-founder of Fashion Revolution, in documentary *The True Cost*



In 2022, global fashion industry was worth

1,8 trillion $



Q1: It is important to me that the clothing (including shoes and accessories) I buy is...

Q1: It is important to me that the clothing (including shoes and accessories) I buy is...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...produced in a way that is not harmful to the environment.	50%	40%	45%	50%	49%	44%	46%	45%	43%	44%	51%	46%	48%	45%	44%
...produced in safe working conditions.	47%	31%	32%	40%	40%	35%	44%	42%	36%	33%	37%	37%	39%	36%	34%
...produced without using forced labor.	48%	32%	38%	46%	44%	37%	43%	45%	40%	41%	38%	41%	41%	40%	41%
...produced without harming animals.	54%	42%	42%	52%	58%	36%	57%	57%	47%	45%	41%	49%	49%	45%	40%
...produced without using harmful chemicals for the consumer.	59%	47%	56%	62%	58%	54%	49%	54%	55%	53%	61%	54%	58%	55%	56%
...made of materials that are produced organically.	23%	16%	16%	17%	20%	16%	18%	20%	17%	15%	19%	16%	18%	20%	18%
...grown and made by workers who are paid a fair, living wage.	45%	24%	41%	50%	42%	38%	40%	39%	37%	41%	42%	42%	41%	38%	33%
...made out of recycled materials.	26%	14%	24%	26%	24%	21%	26%	24%	24%	20%	22%	24%	22%	22%	21%
...produced locally.	27%	18%	26%	18%	20%	24%	19%	21%	21%	22%	25%	18%	22%	26%	27%

COMMENTARY ON THE RESULTS

The highest number (56%) of the interviewees said it is important that the clothing they buy is produced without using harmful chemicals for the consumer (59% of Polish respondents, 47% of Czech respondents, 56% of Slovak respondents and 62% of Hungarian respondents). The biggest group amongst them were people between 55 and 75 years of age. What's interesting is that only 18% of people responded that it is important that clothes are produced organically.

What's striking about this result is that organic production is a way to reduce the amount of toxic compounds in the clothes we wear. But a big amount of chemicals is used after clothes are produced so they won't get damaged in the shipment which often takes days. Buying clothes produced locally definitely could solve the issue of toxins in clothes, yet it was pointed out only by 22% of all interviewees (27% of Polish respondents, 18% of Czech respondents, 26% of Slovak respondents and 18% of Hungarian respondents).

The survey showed that the most valued aspects related to clothing production are: production without hurting animals (48% of all respondents), production without harming the environment (46% of all respondents), and production without using forced labour (41%). The importance of clothes being produced by workers who are paid a fair, living wage is mentioned only by 40% of all of the respondents.

The results illustrate that nowadays consumers from Visegrad countries are really distant from the people who make our clothes and places where textiles and clothes are made. Lack of transparency is a huge issue, which is also a result of massive offshoring that has intensified over the last two decades – it has reached such an extent that some brand executives aren't able to tell in which Bangladeshi factory clothes with their labels are produced.

01 CLOTHES

02

A *brand* is a name, term, design, symbol or any other feature that distinguishes one seller's goods or services from those of other sellers. The original aim of branding was to simplify the process of identifying and differentiating products. Over time, manufacturers began to use branded messages to give the brand a unique personality. A brand is, in essence, a promise to its customers of what they can expect from products, and may include emotional as well as functional benefits.

A *clothing brand* is a label or company with a unified trademark and visual identity that designs and produces garments, footwear, accessories or other lifestyle-related products and services. Clothing brands are a global phenomenon that has a significant impact on culture, with their presence in society growing in the modern age. They are a key factor forming the current zeitgeist and lifestyle-related behaviours. By creating unique designs and visual narratives they have the ability to define lifestyle trends and fashion styles as well as form individual identities.

2 Law Insider. (n.d.). *Clothing Brand Definition*. [online] Available at: https://www.lawinsider.com/dictionary/clothing-brand#:~:text=Clothing%20Brand%20means%20an%20Identification.

The first clothing brands appeared during the Industrial Revolution in Europe and the USA, when large-scale factories began producing clothes. Clothing was no longer made by artisans and tailors who worked on individual pieces, but instead, garments were mass-produced. The first clothing brands that emerged from this system of mass production were Levi's, Brooks Brothers, and Calvin Klein, which were all established in the mid-1800s. The early twentieth century saw an increase in the number of clothing brands being launched. In the 1950s and 1960s, there were dozens of iconic fashion labels, such as Pierre Cardin, Christian Dior, Ralph Lauren, and Yves Saint Laurent[3]. By the late twentieth century, clothing brands had become a major force in the fashion industry. The emergence of fast fashion brands such as H&M and Zara changed the landscape of the industry even further, allowing customers to buy trend-driven clothing at affordable prices while having a large-scale negative impact on both environments and workforce around the globe.

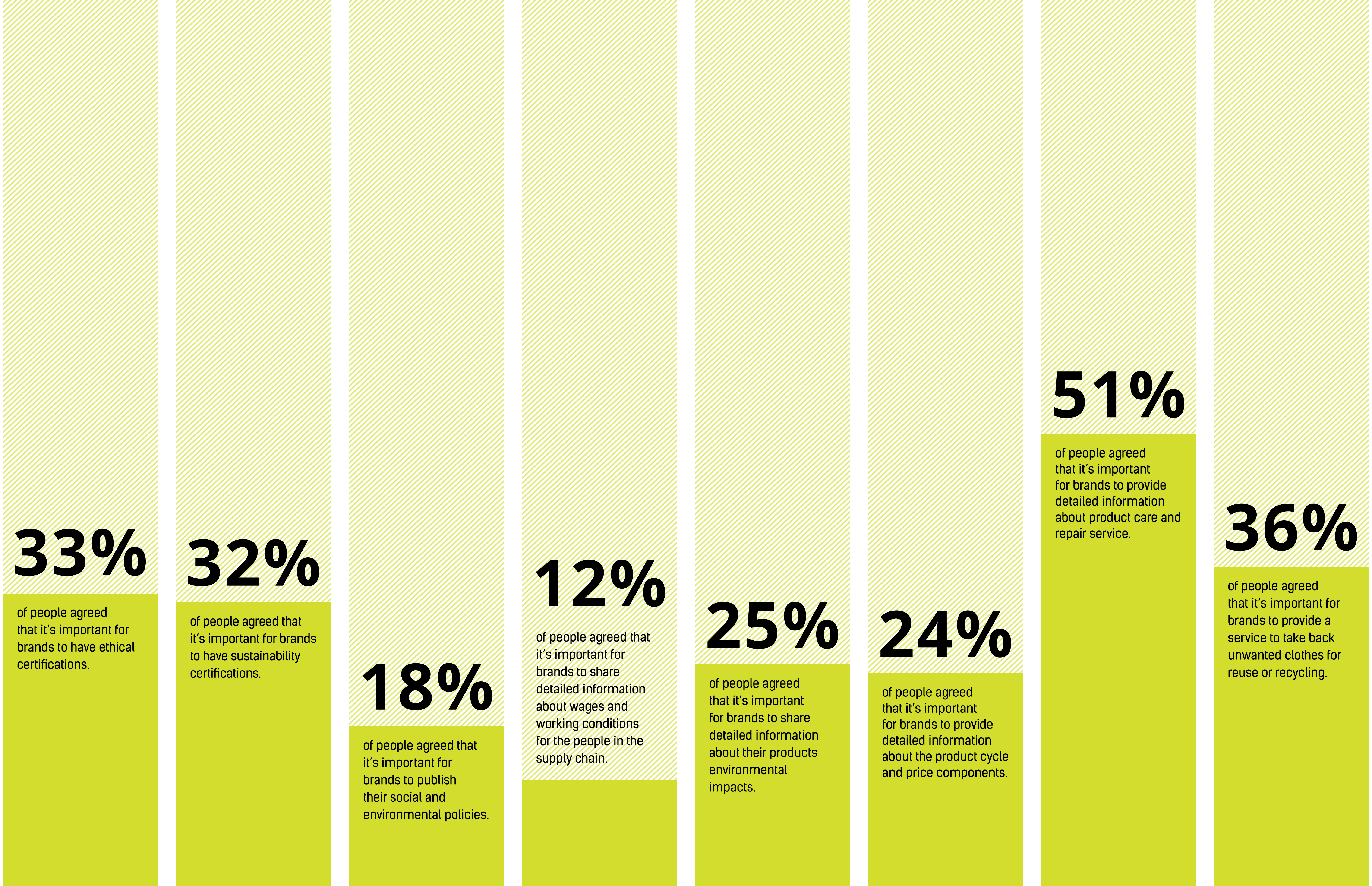
Today, there are thousands of clothing brands available on the market, ranging from high-end luxury labels, specialised niche brands to budget-friendly fast fashion brands. They are one of the most recognisable forms of advertising, providing exposure to consumers in almost every corner of the offline and online worlds.

Brands also have a significant influence on our shopping habits, with their powerful marketing campaigns encouraging us to buy their products. Fashion companies are now utilising new technologies such as artificial intelligence and machine learning to provide personalised customer service, product recommendations, and content for their customers. With the use of AI, clothing design, production and sales are managed in an extremely short period of time. Therefore, some brands like Shein launched a new era of ultra-fast fashion brands. In the light of climate change and due to increased demand, more clothing brands should become increasingly focused on sustainability, circularity and ethical manufacturing practices. Clothing brands are implementing sustainable processes in their factories, using recycled materials, and reducing the use of chemicals in the production of their garments. In addition, many companies are focusing on social responsibility by providing jobs to local communities, supporting charitable initiatives, and engaging in other activities that benefit the environment. On the other hand, many major clothing brands and therefore the majority of the fashion industry are still closely linked to unhuman labour practices such as slavery, child labour, below minimum wage labour or dangerous work conditions, practices which are facing millions of people working in the fashion industry worldwide on a daily basis[4].

55% **of people with income above 1700€ agreed that it's important for brands to provide detailed information about product care and repair service.**

3 D. Lapsanska, *Kapitoly z modneho marketingu*, 2015, p. 32

4 C. Chen, *Shein's Years of Explosive Growth Are Over. What's Next?* [online] The Business of Fashion. Available at: https://www.businessoffashion.com/articles/retail/shein-peak-slowing-growth/ , 2023.



Q2: When choosing a clothing brand to buy from, it is important for brands to...

Q2: When choosing a clothing brand to buy from, it is important for brands to...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...have ethical certifications (the basic principle of these is to preserve the life, health and safety of all human and animal beings, e.g. GOTS, Cradle to Cradle®, Fair Trade.	38%	30%	35%	30%	38%	28%	37%	40%	33%	29%	31%	33%	34%	34%	27%
...have sustainability certifications.	34%	31%	37%	27%	36%	28%	39%	40%	32%	28%	29%	32%	32%	34%	30%
...publish their social and environmental policies.	25%	11%	12%	23%	18%	18%	27%	23%	19%	14%	14%	18%	17%	19%	19%
...share detailed information about wages and working conditions of the people in their supply chain.	18%	7%	12%	13%	12%	13%	21%	15%	12%	10%	10%	14%	12%	12%	11%
...share detailed information about the environmental impacts of their products.	32%	13%	20%	35%	26%	24%	32%	25%	25%	21%	25%	25%	26%	24%	21%
...share detailed information about the product cycle and price components.	28%	16%	22%	28%	24%	23%	31%	26%	22%	22%	22%	25%	25%	20%	25%
...provide detailed information about product care and repair service.	55%	50%	42%	58%	51%	51%	44%	44%	46%	51%	61%	51%	52%	48%	55%
...provide a service to take back unwanted clothes for reuse or recycling.	26%	38%	45%	35%	37%	35%	41%	37%	35%	32%	36%	35%	36%	36%	36%

COMMENTARY ON THE RESULTS

Respondents from Poland and Hungary are the most aware of the importance of having environmental and social requirements from brands from which they purchase clothes as customers. The opposite to that is Czechia with the lowest percentage of respondents having environmental or social requirements from brands. The highest number of respondents in total requires brands to provide them with detailed information about product care and repair service, 55% of Polish respondents, 50% of Czech respondents, 42% of Slovak respondents and 58% of Hungarian respondents. The lowest number of respondents in total requires brands to share detailed information about wages and working conditions of the people in their supply chain – 18% of Polish respondents, 7% of Czech respondents, 12% of Slovak respondents, 13% of Hungarian respondents. The highest difference between percentages within one answer between countries is recorded when respondents were asked if they require brands to share detailed information about the environmental impact of their products – this issue is important just for 35% of Hungarian respondents and only for 13% of Czech respondents – with a total difference of 22 percentage points.

40% of people in age 25–34 agreed that it's important for brands to have sustainability certifications.

35% of Hungarian people agreed that it's important for brands to share detailed information about their products environmental impacts.

03

A *habit* is a routine of behaviour that is repeated regularly and tends to occur subconsciously; habit from the standpoint of psychology, [as] a more or less fixed way of thinking, willing, or feeling acquired through previous repetition of a mental experience. Habitual behaviour often goes unnoticed in persons exhibiting it, because a person does not need to engage in self-analysis when undertaking routine tasks. Habits are sometimes compulsory. A 2002 daily experience study by habit researcher Wendy Wood and her colleagues found that approximately 43% of daily behaviours are performed out of habit. New behaviours can become automatic through the process of habit formation. Old habits are hard to break and new habits are hard to form because the behavioural patterns which humans repeat become imprinted in neural pathways, but it is possible to form new habits through repetition.

PYRAMID OF HABITS

based on the results of the survey

Once formed, habits are incredibly difficult to break because of how deeply they are rooted in our neurocircuitry. This means that they need to be identified early and strategies need to be created to consciously override our impulses so that the old neural pathways can be replaced with the more desirable behaviour[5].

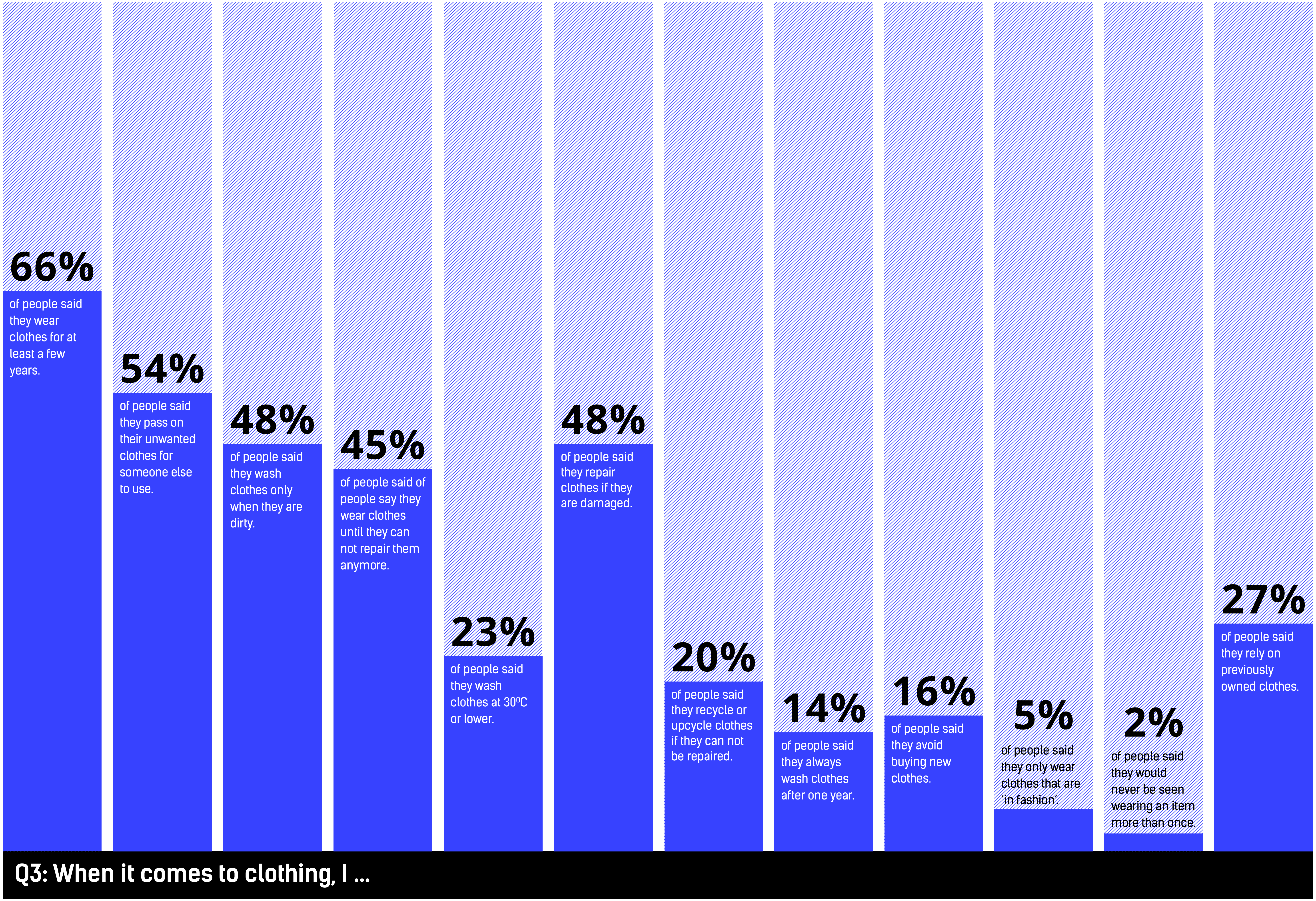
Habits can be described as positive and negative. Developing "good" habits can lead to self-development and productivity while "bad" habits can impede our ability to reach our goals. By becoming aware of our habits and consciously making changes, we can start to reshape our behaviours and find more positive paths. At its core, a habit is a form of automaticity; it occurs as a result of creating neural pathways in the brain through repetition. The more a habit is practiced, the easier it becomes as the habit is reinforced by dopamine.

Clothing habits refer to the processes of choosing, buying, and wearing clothes, and they play a key role in the field of fashion consumer behaviour. These habits are shaped by internal and external influences, such as individual values, beliefs, and preferences, as well as outside factors like fashion trends and the availability of clothing items. Clothing habits can also be a form of self-expression, with people making choices about what to wear based on the messages they want to communicate about themselves to others. Understanding clothing habits can provide important insight into the decisions that people make about their fashion choices.

Current clothing habits are deeply rooted in the 18th and 19th centuries, when the Industrial Revolution rapidly shifted clothing habits forever through institutionalisation of fashion – haute couture, as well as a new concept of producing garments in factories – mass production. Since then, clothes have been an instant commodity affected by fashion seasons, styles and lifestyle trends. With the rapid advancements in technology and changes in consumer trends, clothing habits have undergone another seismic shift in the past few decades. The invention of the internet and social media have massively increased consumers' hunger for the new, the fast, the cheap and the trendy, and simultaneously decreased their requirements related to quality, functionality, longevity, and environmental and social mindfulness.

Nevertheless, in recent years, as a reaction to climate change crises, consumers have seemingly been aware of the increasingly demanding transparency, responsible production methods, circularity and ethical labour practices within all stages of the fashion industry. The concept of slow fashion, which emerged in recent decades, is a conscious consumerism alternative to the ever-speeding fast fashion and is being promoted by newly formed social movements and platforms supporting the transformation of the fashion industry and wasteful consumer habits.

5 B. Gardner, *Making health habitual: the psychology of 'habit-formation' and general practice*, 2006, [online] National Library of Medicine. Available at: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3505409/.


66%
of people said they wear clothes for at least a few years.
54%
of people said they pass on their unwanted clothes for someone else to use.
48%
of people said they wash clothes only when they are dirty.
45%
of people said of people say they wear clothes until they can not repair them anymore.
23%
of people said they wash clothes at 30°C or lower.
48%
of people said they repair clothes if they are damaged.
20%
of people said they recycle or upcycle clothes if they can not be repaired.
14%
of people said they always wash clothes after one year.
16%
of people said they avoid buying new clothes.
5%
of people said they only wear clothes that are 'in fashion'.
2%
of people said they would never be seen wearing an item more than once.
27%
of people said they rely on previously owned clothes.
Q3: When it comes to clothing, I ...

03 HABITS

Q3: When it comes to clothing, I...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...wear clothes for at least a few years	65%	66%	71%	63%	71%	61%	60%	67%	65%	66%	68%	63%	68%	66%	65%
...pass on unwanted clothes to someone else to use.	54%	52%	60%	50%	66%	41%	60%	56%	54%	53%	52%	56%	54%	52%	50%
...wash clothes only when dirty.	52%	49%	53%	39%	44%	53%	51%	45%	48%	47%	50%	44%	48%	53%	50%
...wear clothes until I cannot repair them anymore.	49%	40%	44%	44%	42%	47%	47%	47%	46%	43%	42%	44%	43%	48%	44%
...wash clothes at 30ºC or lower.	30%	18%	21%	24%	26%	20%	17%	25%	21%	24%	24%	22%	24%	23%	21%
...repair clothes if they are damaged.	46%	47%	49%	49%	51%	44%	46%	40%	45%	49%	54%	46%	50%	45%	49%
...recycle or upcycle clothes if it can not be repaired.	25%	15%	24%	15%	23%	17%	25%	22%	19%	16%	21%	19%	20%	20%	22%
...always wash clothes after one wear.	12%	10%	10%	22%	18%	9%	18%	16%	16%	13%	10%	17%	13%	11%	13%
...avoid buying new clothes.	21%	14%	16%	15%	18%	14%	20%	20%	16%	14%	15%	17%	16%	17%	18%
...only wear clothes that are 'in fashion'.	8%	2%	5%	3%	4%	5%	8%	6%	6%	3%	3%	5%	4%	5%	5%
...would never be seen wearing an item more than once.	4%	1%	1%	1%	2%	2%	4%	3%	2%	1%	1%	2%	2%	2%	2%
...rely on previously owned clothes.	33%	38%	10%	27%	31%	23%	36%	30%	28%	23%	25%	30%	26%	26%	28%

COMMENTARY ON THE RESULTS

The highest percentage of respondents in total answered that they wear clothes for at least a few years (65% of Polish respondents, 66% of Czech respondents, 71% of Slovak respondents, 63% of Hungarian respondents). Respondents are also willing to donate clothes to the needy – it was the second highest percentage of respondents in total, and they answered that they pass on unwanted clothes to someone else (54% of Polish respondents, 52% of Czech respondents, 60% of Slovak respondents, 50% of Hungarian respondents). On the whole, the lowest number of consumers declared buying clothes for one occasion (4% of Polish respondents, 1% of Czech respondents, 1% of Slovak respondents and 1% of Hungarian respondents) or wearing only clothes that are "in fashion" (8% of Polish respondents, 2% of Czech respondents, 5% of Slovak respondents, 3% of Hungarian respondents).

04

2022 (MMXXII) was a common year starting on Saturday of the Gregorian calendar, the 2022nd year of the Common Era (CE) and Anno Domini (AD) designations, the 22nd year of the 3rd millennium and the 21st century, and the 3rd year of the 2020s. 2022 saw the removal of nearly all COVID-19 restrictions and the reopening of borders in most countries. 2022 was also a year dominated by wars and armed conflicts (Russian invasion of Ukraine or the internal conflict in Myanmar and the Tigray War).

LAST YEAR

DECEMBER 2022 — Christmas shopping – people are saving, small brands notice drop in sales

NOVEMBER 2022 — 26% less sales then in 2021 during Black Friday in Poland[6]

NOVEMBER 2022 — Fashion attendees durong 27th edition of the UN's Conference of the Parties focus on targeting greenwashing and biomaterials[7]

SEPTMEBER 2022 — "As of now, Earth is our only shareholder"[8] – Yvon Chouinard, founder of Patagonia

SUMMER 2022 — Official launch of Frayme Mylo™, the world's first luxury handbag made from mycelium (mushroom-leather alternative[9])

JUNE 2022 — Good Clothes Fair Pay campaign launch[10]

MARCH 2022 — Textile Strategy, Proposal of the Green Claims Directive (not a law yet)

FEBRUARY 2022 — Russian aggression on Ukraine, beginning of the war

6 https://retailnet.pl/2022/12/07/black-friday-2022-polacy-wlozyli-do-koszykow-mniej-niz-przed-rokiem/

7 O. Piinock, "Fashion Attendees At Cop27 Say Meaningful Targets And Greenwashing Are Key Concerns" 9 Nov, 2022., www.forbes.com/sites/oliviapinnock/2022/11/09/fashion-attendees-at-cop27-say-meaningful-targets-and-greenwashing-are-key-concerns/ accessed 29 March 2022

8 E. McCormick, "Patagonia's billionaire owner gives away company to fight climate crisis", Sept. 2022, www.theguardian.com/us-news/2022/sep/14/patagonias-billionaire-owner-gives-away-company-to-fight-climate-crisis-yvon-chouinard, accessed 29 March 2022.

9 https://www.stellamccartney.com/us/en/stellas-world/frayme-mylo-mycelium-bag.html

10 https://www.goodclothesfairpay.eu/

Business analysts expected that in 2022 the fashion industry will recover after all the challenging socio-economic disturbances from the previous two years. Lockdowns and shop closures caused major supply chain interruptions which exposed the weakness of the global but very fragmented system we are part of today. Nowadays, we can observe accelerated digitisation in the clothing industry which definitely was sped up by the consequences of the COVID-19 pandemic. Yet, 2022 revealed how far behind other industries fashion is when it comes to the innovation sphere. The current system is becoming obsolete and there is little time to transform it, while the events of the past year show it's no longer an option but a necessity[11].

The Russian military aggression against Ukraine started in February. The war initiated an increase in energy prices, shook the security of material supply, and impacted the exporting segments of the textiles ecosystem[12]. As a result, thousands of people, mainly women with kids, migrated from their homes immediately, leaving all their belongings behind. The biggest refugee crisis in Europe since WWII[13] put to the test our readiness to share our wealth and to care for others which many people expressed by giving away clothes. Everyone had clothes to give away. Very quickly charity collection points started announcing that garments were no longer needed. It was a striking illustration of overproduction and the troubling discrepancies between the economic and social value of clothing.

The year 2022 highlighted the importance of actions – not desires – of the industry to become greener, more sustainable, circular and resilient. European industry stakeholders stressed the urgency of everyone taking accountability for their actions. Those insights were obtained and promoted by the European Union that introduced new strategies and directive proposals in order to regulate how brands can claim green transformation.

Last year's enormous energy crisis drew attention to the seriousness of making European textiles a "*more competitive sector that is more resistant to global shocks.*"[14] The Textiles Strategy presented by The European Union Commission in March addresses the need to "*reverse the overproduction and overconsumption of clothing*" and "*driving fast fashion out of fashion*"[15]. Last year made it clear that the European textile market needs to promote sustainability, circularity, traceability and transparency in order to achieve the Textile Strategy goals.

2022 once again revealed the vulnerability of global supply chains and the most vulnerable participants of the system were left with poverty wages[16]. The pressure on the global fashion supply chains and their workers is a result of the overproduction driven by overconsumption. The launch of the Good Clothes Fair Pay campaign in July is an ongoing call to regulate wages of fashion industry workers', amongst whom 75% are women – the group is the most affected one when brands don't collect orders in time (another case which is poorly regulated). We are part of the problem and the cause of that pressure, as we demand cheap clothing. According to Accenture's report in 2022, 80% of Polish consumers indicate price as the main purchase factor. Only 34% declare that ecological claims are more important.

Textile and clothing producers were hit by multiple cost increases (across the supply chain) and the pressure from consumers demanding affordable products due to the fact that they had to reduce

11 The State of Fashion 2022 McKinsey x Business of Fashion https://www.mckinsey.com/~/media/mckinsey/industries/retail/our%20insights/state%20of%20fashion/2022/the-state-of-fashion-2022.pdf

12 https://environment.ec.europa.eu/publications/textiles-strategy_en

13 https://www.weforum.org/agenda/2022/06/ukraine-refugee-crisis-europe-conflict-migration/

14 https://environment.ec.europa.eu/publications/textiles-strategy_en

15 Ibidem.

16 "We had expected that the whole fashion industry would not get back to 2019 levels until the end of 2022. And we already achieved that at the end of 2021." Achim Berg: https://www.mckinsey.com/industries/retail/our-insights/how-current-global-trends-are-disrupting-the-fashion-industry

their expenditure because of high inflation rates.[17] As our research has shown, the price is the most critical determinant of a purchase. However, durability, quality, and basic style of a garment were pointed out as almost equally important factors influencing purchasing choices.

"In a way, despite a looming recession and inflation rates, we see that consumers have a kind of backlog and a desire to spend on fashion." [18]

In the last twelve months, 70% of surveyed people bought clothes on sale. Experts note that despite economic challenges consumers still desire to spend on fashion, and only a few percent of customers forwent shopping altogether. Shopping sprees skyrocketed as a result of the end of leggings and work-from-home athleisure outfits era. Low price expectations and purchase needs are reflected in the growing popularity of second-hand shops. Last year, 50% of Polish consumers became fashion thrifters because of second-hand shops' lower prices[19]. In conclusion, we can see that even though consumer behaviours may have changed a bit, at the end of the day we still buy a lot of clothes – both new (on sale, when we can get them as cheap as possible) and used.

Despite the growth of businesses with circular models, very few people rent clothes or refrain from buying them. People don't associate sustainability and circularity with reduction of fashion consumption. Interestingly, there is a popular opinion that Gen Z is the first generation to pay significant attention to sustainable choices[20] which drives the industry towards a more dynamic transformation. This tendency, however, is not reflected in our research, as the age group doesn't seem to play a huge role when it comes to responses. The European fashion sector has a lot of room for improvement in knowledge sharing to grow awareness about true costs and impacts of fashion consumption amongst all generations.

Even though there is no strong tendency towards sustainable and local fashion preferences, the above results made us wonder if people associate quality and evergreen aesthetics with product durability. According to Kristine Harper, author of Aesthetic Sustainability[21] , one of the strategies of designing for durability is choosing minimalistic aesthetics. What is more, consumers choose price over the green claims, not being aware that actions which are sustainable can require a minimum amount of money. According to the UK-based WRAP organisation, prolonging the life cycle of clothes by "just 9 months can reduce its environmental impact by 20–30%"[22]. Instead of choosing sustainably made clothes over fast fashion products, first and foremost we need to take good care of those we already own in order to maximally postpone the moment they end up in the landfill. The goal is to buy less, use more. That, of course, requires industry to stop delivering poor quality, cheap clothes, but we need to stop demanding it. Focusing on durability is a good direction for consumers to support industry transformation.

17 80% of consumers indicate price as the most important factor determining their purchase choice. Only 34% say that ecological claims are at the first place, before the price. Source: R. Reif, A. Miazga, A. Cichy, D. Kapkowska (2022). Drugie życie ubrań: Jak Polacy kupują?

18 A. Berg, *How current global trend*: https://www.mckinsey.com/industries/retail/our-insights/how-current-global-trends-are-disrupting-the-fashion-industry

19 R. Reif, A. Miazga, A. Cichy, D. Kapkowska (2022). Drugie życie ubrań: Jak Polacy kupują?, https://www.accenture.com/content/dam/accenture/final/a-com-migration/manual/r3/pdf/pdf-174/Accenture-Drugie-Zycie-Ubran.pdf

20 EcoWarior, HOW GEN-Z BECAME THE GENERATION OF FASHION SUSTAINABILITY, https://www.businessoffashion.com/articles/sustainability/why-fast-fashion-still-has-gen-zs-heart/?outputType=amp [accessed on 21 March 2022].

21 Harper, K. (2017) "Aesthetic Sustainability. Product design and Sustainable Usage" Routledge, London

22 https://wrap.org.uk/resources/guide/textiles/love-your-clothes

KATARZYNA OLESIUK

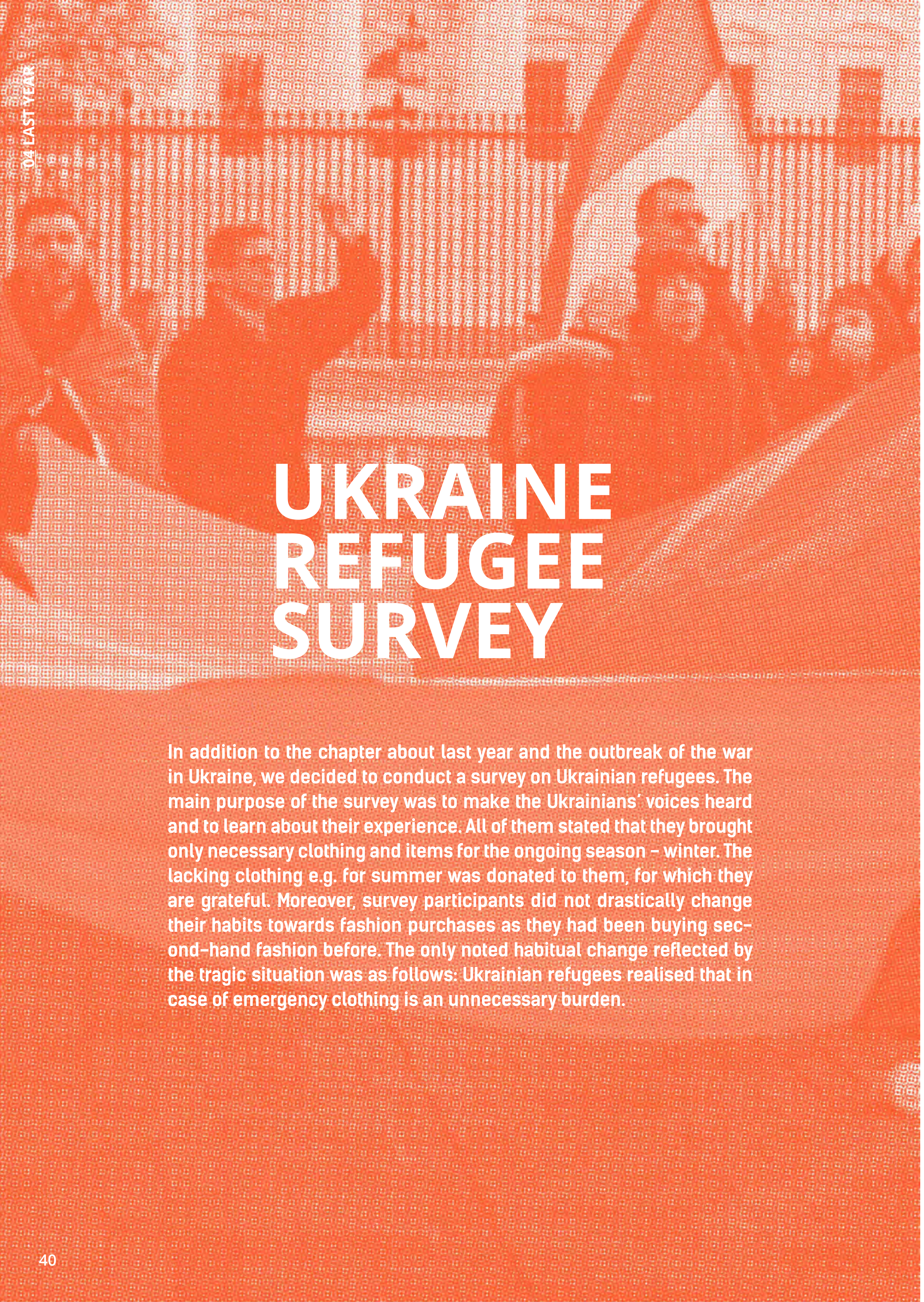
Research Group
Fashion Revolution Poland

"We are left with a question – to what extent the focus on durability, quality and styling multi-functionality results from the awareness and the need to direct one's consumption habits towards more sustainable and socially or environmentally friendly tracks, and how often it results from the demanding economic situation."

JULIA KALETA

Research Group
Fashion Revolution Poland

"In my opinion, price being in the first place focuses only on the value of clothes seen as a commodity. What should determine our choices is an honest check with ourselves – we have to decide if we need new clothes, why we need them and for how long they can serve us. Nevertheless, to be in a position to make such a decision is still a privilege that the majority of societies worldwide don't have."



UKRAINE REFUGEE SURVEY

In addition to the chapter about last year and the outbreak of the war in Ukraine, we decided to conduct a survey on Ukrainian refugees. The main purpose of the survey was to make the Ukrainians' voices heard and to learn about their experience. All of them stated that they brought only necessary clothing and items for the ongoing season – winter. The lacking clothing e.g. for summer was donated to them, for which they are grateful. Moreover, survey participants did not drastically change their habits towards fashion purchases as they had been buying second-hand fashion before. The only noted habitual change reflected by the tragic situation was as follows: Ukrainian refugees realised that in case of emergency clothing is an unnecessary burden.

1. Clothes taken from home when fleeing the war / the basis for selection:

I had half an hour to get my only suitcase ready before the evacuation train. Surprisingly, what I was throwing in was all I really needed after all. I had: 2 sweaters, one pair of boots, one pair of shoes, a dress, jeans, a sweatshirt and sneakers for some reason, I also took a white button down cotton shirt that I didn't even know what I would use for, but I did use it a lot for job interviews lately. Also, I put on a leather jacket since I had splurged on it and I was using it a lot during the warmer seasons.	*Only the most important basic one*	*Casual and sports style clothing*
	When you try to save your life, you don't think too much about clothes. And when you don't have permanent accommodation and must move many times, you try not to have many clothes.	*2–3 shirts, 1 vest, 3 pairs of briefs, 1 bra, 2 pairs of socks, trousers and top for workout; jeans and hoodie were on me, as well as a winter coat, uggs, a hat and gloves*
I only took warm winter clothes. In addition, it was the first time in my life that I took many random things connected to relatives and friends: previously, I didn't have a habit of collecting "symbolic" things like cinema tickets, wood sticks, etc.	*I had only one piece of luggage when I escaped to poland. I took warm clothes, those which I can style together and still look fine. I had 1 pair of shoes, 1 warm coat, a few t-shirts, a cardigan, 2 pairs of jeans and underwear. My main goal was to collect things in the first period of war. I also thought that i might come back in a few weeks.*	*Some regular jeans, t-shirt, underwear, pyjamas, house shoes*
		Winter jackets, warm clothes

2. Clothing received from donations:

People who hosted us offered free second-hand clothes. I felt gratitude for their willingness to help but I also felt a kind of humiliation. I don't like second hand clothes!

I didn't ask for or receive any clothes because I could bring my own ones and felt I didn't need them as much as others who escaped with just a few clothes.

I got some free clothing from my friend in Lviv where we stayed a month after evacuation from Kyiv. Gave me a skirt, jeans, a t-shirt, a sweater, a vyshyvanka (a national Ukrainian embroidered shirt), šatnik vesna, it was another pair of jeans, more t-shirts, a skirt, a jacket, a short trench coat; I found shoes at a Brno street near my home.
I felt joy, because there were nice, quality things that i got for free, and I love new clothes. I bought second-hand clothes and even shoes earlier, so this moment didn't embarrass me.

I never used "pre-loved" clothes before, never shopped for second-hand ones.
What I picked from the humanitarian aid warehouse on husova was a sweater and a skirt. that was a new experience. I took it with gratitude. Still have the skirt, since the sweater happened to be a men's sweater.

Yes, I took such gifts. The volunteer who helped us with the settlement gave us clothes. There were clothes for me and for my grandchildren. I felt great gratitude at this moment because I didn't have a possibility of buying clothes by myself, it's too expensive.

I received clothes from volunteers, sports style ones and summer ones, new and second-hand. I don't like wearing second-hand clothes. I had no money and no job, so I took them. I hardly buy anything. I wear what il-have. I like also upcycling and I still have some clothes I brought from home, also ones which I bought in Italy.

One Polish family helped me and my friend to escape the war. After my arrival to Warsaw, they invited us to their house, where we received clothes. Feelings were mixed. I felt both sorrow and thankfulness.

We did not receive clothing, but rather basic food items and necessities for household, furniture, etc.

One family hosted me and they provided me with clothes. I took only a few since I needed some homewear and things like socks, leggings, etc. I am not really into gathering old poor-quality clothes, so I didn't take tons of things. I planned to earn money and to buy them by myself.

3. Shopping, wearing and maintenance habits in Ukraine and after leaving the country:

I have been leaning towards recycling and sustainability more and more over time. I do believe that minimalism and sustainability might have a huge impact on the mankind. We don't need a lot, we just need the basic capsule wardrobe with clothes to mix and match and wear for any occasion. I started to enjoy shopping in second-hand shops to be smarter with the allowance I have to spend on myself. That can be fun and I have learned it from my own experience. I was a high maintenance woman before, but the current situation has drastically changed the amount I can spend on myself, because there are much higher priorities related to my and my son's well-being in a different country. I do have a skin care routine, but a newer (cheaper) version of it. Miss my monthly haircuts, though.

While shopping, I usually rely on the rational part of my mind: if there is something I can live without, I will not buy it. And I also started buying one item of clothing at a time.

In general, my shopping habits didn't change, but I saved on clothes. I don't have many things.

Not much except one thing – I spend very little time on it, I think that I have enough clothes (my husband sent me some things from Ukraine by post), and now I only visit šatnik vesna once a month rather for fun and H&M shop because I love white t-shirts (and they quickly become not so white).

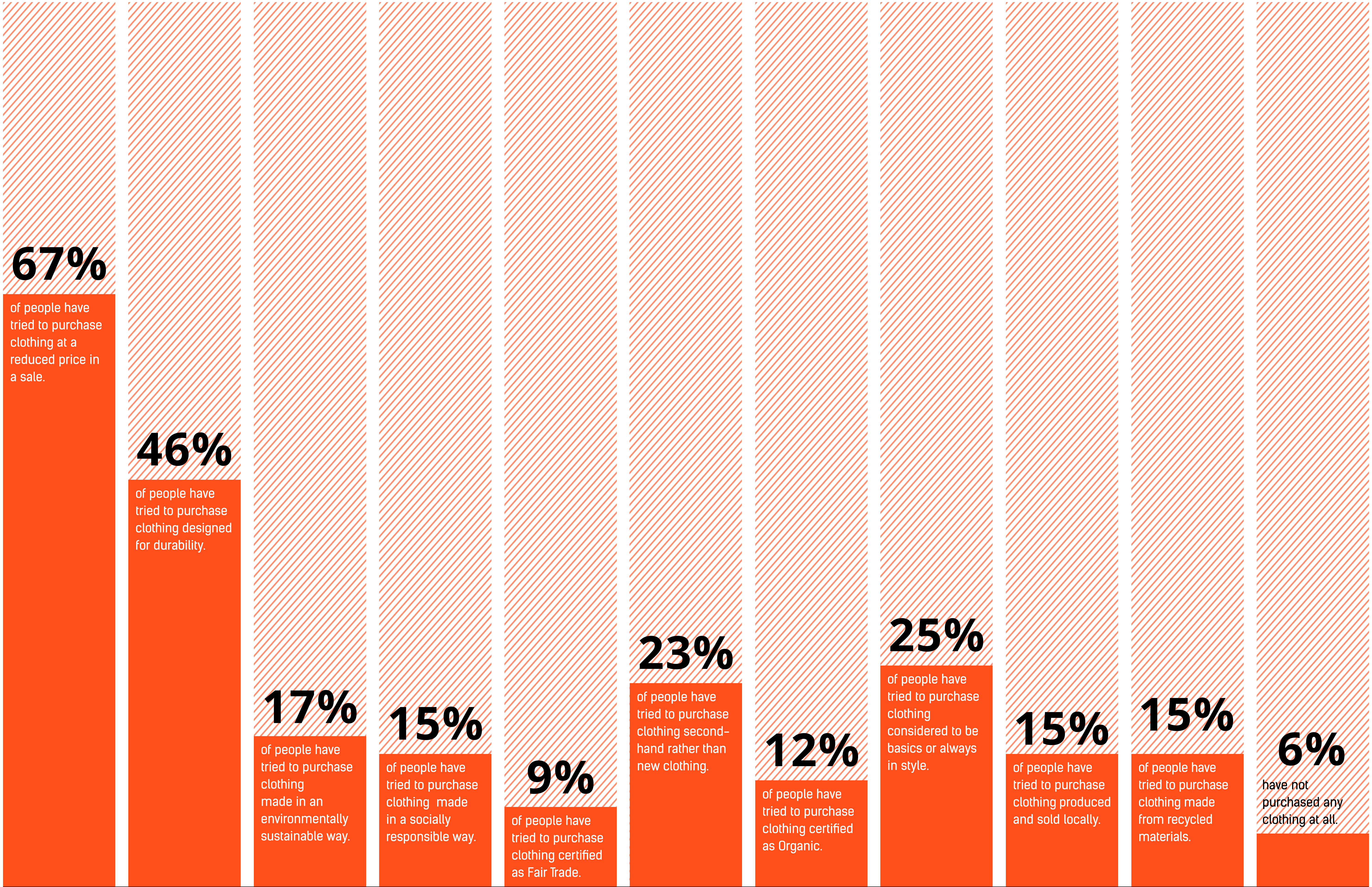
I made some important general conclusions. first: all the necessary things should fit in one luggage; second: it is better not to buy extra things (I will not buy souvenirs), I would rather collect memories; third: it is better not to put off your life for later. Live it now because there can be no tomorrow!

I don't shop and wear the same clothes all the time.

In Ukraine, I often bought second-hand clothes, these habits are still the same now.

Regular lifestyle changes for sure. I used to love buying tons of clothes, cosmetics, personal hygiene stuff. After the war began, I got rid of the overconsumption because I suddenly realised that in the situation of potential danger, I would not need most things. The revaluation of life led to the development of a new skill – money saving.

I don't think that my habits have changed a lot. I have always been struggling with buying clothes since I have some issues with financial matters and I always prefer to buy cosmetics or to spend money on experience and memories rather than shop in a chain store like Zara. I always choose qualityover quantity and my habits only solidified because of the war.



Q4: In the last 12 months I have tried to purchase clothing items that are...

Q4: In the last 12 months I have tried to purchase clothing items that are...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...at a reduced price in a sale.	63%	70%	69%	64%	73%	60%	70%	70%	68%	68%	62%	65%	68%	67%	64%
...designed for durability.	41%	47%	42%	55%	42%	51%	51%	42%	43%	45%	50%	43%	48%	46%	47%
...made in an environmentally sustainable way.	26%	8%	13%	20%	17%	16%	21%	18%	16%	14%	17%	17%	17%	16%	17%
...made in a socially responsible way.	21%	8%	17%	12%	15%	14%	18%	15%	15%	13%	14%	13%	16%	16%	14%
...certified as Fair Trade.	14%	8%	8%	6%	9%	9%	12%	12%	10%	6%	8%	7%	8%	12%	13%
...second-hand rather than new clothing.	29%	21%	26%	16%	32%	15%	29%	30%	27%	19%	18%	27%	22%	23%	17%
...certified as Organic.	20%	11%	11%	7%	15%	10%	13%	17%	12%	8%	12%	11%	12%	15%	17%
...considered to be basics or always in style.	41%	20%	22%	18%	34%	17%	34%	34%	26%	20%	21%	23%	25%	29%	24%
...produced and sold locally.	18%	14%	17%	10%	14%	15%	16%	15%	14%	13%	16%	13%	14%	16%	18%
...made from recycled materials.	17%	15%	16%	13%	18%	13%	22%	20%	15%	13%	12%	13%	15%	18%	16%
...I have not purchased any clothing at all.	3%	6%	5%	9%	4%	8%	3%	4%	5%	5%	9%	8%	6%	4%	3%

29% of people in age 16–24 of people have tried to purchase clothing second-hand rather than new clothing.

41% of Polish people have tried to purchase clothing considered to be basics or always in style.

04 LAST YEAR

05

A *duty* is a commitment or expectation to perform some action in general or if certain circumstances arise. Many duties are created by law, sometimes including a codified punishment or liability for non-performance. Legal rights are those bestowed onto a person by a given legal system (they can be modified, repealed, and restrained by human laws).

DUTY

In recent years, the fashion industry has realised that it needs to change its practices, and many brands have committed to reducing their environmental footprint, but what is still missing is accountability. NGOs can educate consumers, but we need comprehensive solutions for serious regulation.

Should the fashion industry be controlled by the government?

More and more often, we see young people taking the leading role in campaigns and initiatives related to environmental and social issues, which also include the fashion industry. Surveys, research materials and recommendations created by FR are also intended to reach decision-makers.

The research is exploring several options of how to regulate the fashion industry.

KLAUDIA PÖLTZ

Research Group
National Fashion League Hungary Association

So far, most brands have not really addressed the impact on people and the planet. Now campaigners and policy makers are calling for stricter regulations. But how can legislation make a difference? Let's hope 2023 will be a pivotal year for new laws on the fashion industry. The Fashion Act 2021, put forward by the New Standard Institute in New York, will require brands to disclose (among other things) their greenhouse gas emissions and use of energy, water and plastics, and will require mandatory due diligence across the supply chain (including reporting on wages). Any brand that does not comply with the law would be fined two percent of its annual revenue. Although the new fashion law has yet to be adopted, it is an important action in the growing movement towards imposing stricter regulations on the fashion industry, which has now become inevitable. When it comes to regional actions, last year the European Union tabled draft legislation on due diligence, eco-design and product labelling that would affect all companies doing business in the EU. One of the main problems expected to be covered by the proposals is textile waste (estimated at 92 million tonnes per year worldwide). France and Sweden have already extended producer responsibility legislation in place, making companies responsible for collecting, sorting and recycling textiles. The Hungarian legislative amendments needed to comply with the EU's waste management directives – they were adopted by Parliament in December 2022 and will enter into force on 1 July 2023. In addition, the Packaging and Packaging Waste Directive will oblige all Member States to set up extended producer responsibility schemes for packaging by 2024.

Greenwashing is also likely to be a key issue in the areas to be regulated. The UK is already leading the way in this area, with the Green Claims Code published last year to tackle false or misleading marketing about the environmental impact of products. It would also be a big step forward if the EU were to introduce specific labelling guidelines for brands wishing to claim the environmental credentials of a product.

The Good Clothes Fair Pay campaign was launched to demand living wage legislation for global garment workers in the EU. The proposed legislation would require brands to disclose details such as the addresses of production sites, the number of workers at each site and the weekly take-home pay of workers. Brands would be banned from practices such as paying suppliers more than 60 days after delivery, cancelling orders without notice, and disclosing supplier information on request. If brands break the rules, they could be excluded from government subsidies and loans and have their goods seized.

For example, two key proposals – Good Clothes Fair Pay in the EU and the Fashion Act in New York State – would cover the entire supply chain of companies operating in their markets. We look forward to positive changes this year and to reforming practices in the EU and Hungary.

WHAT COULD GOVERNMENTS DO?

1. Make companies responsible for collecting, sorting and recycling textiles by law
2. Protect garment workers' rights and raise living wages on a national level
3. Penalise for greenwashing actions and commission a website with a list of all sustainable brands in the V4 countries, so that customers can easily check which brands are green (EU labels will be helpful as well)
4. Support and invest in these brands with collaboration with the fashion agencies (e.g. by organising V4 Sustainable Fashion Week – applies to the V4 governments)
5. Enforce the use of microplastic filters to capture degradable fibres at local authority wastewater treatment plants.

33%

of people agreed that the government has a role to play in ensuring clothing (including shoes and accessories) is sustainably and ethically produced.

41%

of people agreed that the government should make it easier to purchase clothing produced in a sustainable way.

30%

of people agreed that the government should provide financial support for the clothing company to become more sustainable.

43%

of people agreed that the government should have an impact on increase the recycled textile quantity, e.g. support and invest in clothing to clothing recycling technologies avaiable locally.

39%

of people agreed that the government should foster education about repairing and recycling of clothing and sustainability at a school level by adding it as a mandatory class in teaching curriculum.

Q5: I feel the government...

05 DUTY

Q5: I feel the government...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...has a role to play in ensuring clothing (including shoes and accessories) is produced sustainably and ethically by requiring the transparency of fashion companies.	39%	21%	29%	41%	33%	32%	39%	34%	32%	31%	31%	33%	33%	32%	29%
...should make it easier to purchase clothing produced in a sustainable way.	35%	36%	45%	46%	41%	41%	37%	37%	41%	40%	44%	41%	42%	39%	38%
...should provide financial support for the clothing company to become more sustainable.	41%	29%	22%	28%	33%	27%	36%	32%	29%	27%	29%	29%	32%	29%	27%
...should have an impact on increase the recycled textile quantity, e.g. support and invest in clothing to clothing recycling technologies avaiable locally.	44%	37%	48%	43%	45%	41%	45%	44%	44%	41%	43%	42%	43%	44%	42%
...should foster education about repairing and recycling of clothing and sustainability at a school level by adding it as a mandatory class in teaching curriculum.	42%	32%	39%	42%	40%	38%	42%	42%	33%	35%	42%	42%	38%	38%	36%

COMMENTARY ON THE RESULTS

About 40% of respondents see the need for the government's involvement in fashion production and consumption processes. There is no huge difference between male and female respondents and no real difference in terms of age. It is of high importance for the V4 countries that the governments do something to increase the amount of recycled textiles. This is a high score, considering the fact that according to researchers one of the fundamental problems related to closing the loop in the fashion industry is customers' lack of knowledge about textile recycling. Usually, customers are more aware of how to recycle materials like plastic or glass, but not clothing. Moreover, they do not understand why textile waste should be recycled[23]. Education is needed for change, however, sustainability education at the school level by including it as a mandatory subject in the curriculum is supported by 42% of Polish respondents and 42% of Hungarian respondents, and by a slightly lower percentage of respondents from Czechia and Slovakia.

46% **of Hungarian people agreed that the government should make it easier to purchase clothing produced in a sustainable way.**

For the UK, the main question is whether there is a case for GCA-type fashion oversight, which is already well established in the food industry. Fashion retailers would be subject to fashion supervision and a formal code of practice, enforced by a regulatory authority. This would drastically reduce the prevalence of abusive shopping practices (cancellations, late payments). A similar initiative could be taken at the national level to ensure comprehensive regulation. Legislation is needed to support those who make a determined effort to design and manufacture in a sustainable and environmentally responsible way. The Hungarian Fashion & Design Agency, together with the government, should play a role in ensuring that products are produced in a sustainable and ethical way, by requiring transparency from fashion companies. It is of utmost importance for the V4 countries that the governments do something to increase the amount of recycled textiles, for example by investing in locally available recycling technology. The governments should control sales: twice a year, the French allow traders to get rid of their leftover goods. Instead of condoning the constant compulsion to buy things, a more relaxed environment could be provided by introducing regulations at a state or regional level, and our expenditure could be reduced.

23 M. Koszewska," Circular Economy — Challenges for the Textile and Clothing Industry", Autex Research Journal, 2018, 18(4), 337–347. https://doi.org/10.1515/aut-2018-0023

06

Social responsibility is an ethical framework in which an individual is obligated to work and cooperate with other individuals and organisations for the benefit of the community that will inherit the world that the individual leaves behind. Corporate Social Responsibility (CSR), or Social Impact, is a form of international private business self-regulation which aims to contribute to societal goals of a philanthropic, activist, or charitable nature by engaging in, with, or supporting professional service volunteering through pro bono programmes, community development, administering monetary grants to non-profit organisations for the public benefit, or to conduct ethically oriented business and investment practices.

RESPON-SIBILITY

Corporate Social Responsibility **(CSR) is a self--regulatory business model whereby companies make a coordinated effort and commitment to operate in a way that improves rather than harms society and the environment. In this way, the companies take social responsibility for themselves, their stakeholders and also for the public, the citizens. Getting to a point where all of those elements are considered to be as important as profit will take a lot of political will.**

The impact of the big companies we know is crucial to the shift towards sustainability and the circular economy. The well-known big fast fashion companies and their manufacturers are causing enormous environmental damage, but at the same time, with the right financial and research resources, they could be catalysts for this process.

ANNA MIAZGA

Sustainability Manager
Accenture

According to a survey by Fashion Revolution, about half of consumers consider the environmental and social impact of their clothing to be important. While this is a positive sign, there is still a need for more awareness and action. This becomes even more apparent when looking at the more detailed results of the survey and noting that there is a significant decrease in interest in what is required in terms of the brands we buy from or our own buying behaviour.

However, there is an increasing recognition of the role of laws and regulations in driving brands to meet higher standards related to human rights and environmental issues. This suggests that, perhaps, change in the garment industry should not depend so heavily on consumers. Instead, more emphasis should be placed on government regulations and incentives to encourage companies to adopt more sustainable practices.

What else can brands do? From this and other studies, it appears that Polish consumers are very economically oriented and may prioritise affordability over sustainability in their purchasing decisions. The same applies to the behaviour of Poles that we observe in the market, and it has been confirmed in this study. For example, they wear clothes for a few years, wear them until they are beyond repair and share or sell them when they are no longer needed. All these economically beneficial activities also have positive impacts.

Armed with this knowledge, by prioritising human-centred design, companies can and should find solutions that balance economic considerations with sustainability. In this way, we can work towards a future where sustainability and human well-being are not competing, but mutually reinforcing priorities.

59% **of people in age 55-74 agreed that fashion brands should be required by law to protect the environment at every stage of making and selling their products.**

44% **of Polish people agreed that fashion brands should be required by law to publish which factories are used to manufacture their clothes.**

Q6: I feel fashion brands should...

45%

of people agreed that fashion brands should be required by law to respect the human rights of everybody involved in making their products.

54%

of people agreed that fashion brands should be required by law to protect the environment at every stage of making and selling their products.

21%

of people agreed that fashion brands should be required by law to provide information about the social impacts of their business.

33%

of people agreed that fashion brands should be required by law to provide information about the environmental impacts of their business.

37%

of people agreed that fashion brands should be required by law to prove they are paying all garment workers who make their products a fair, living wage.

37%

of people agreed that fashion brands should be required by law to publish which factories are used to manufacture their clothes.

31%

of people agreed that fashion brands should be required by law to publish which suppliers they use to source the fabrics and raw materials used in their clothing.

06 RESPONSIBILITY

Q6: I feel fashion brands should...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...be required by law to respect the human rights of everybody involved in making their products.	50%	37%	49%	43%	49%	41%	54%	47%	44%	44%	42%	47%	44%	45%	42%
...be required by law to protect the environment at every stage of making and selling their products.	53%	51%	62%	50%	57%	51%	49%	55%	50%	52%	59%	51%	56%	55%	52%
...be required by law to provide information about the social impacts of their business.	28%	19%	18%	18%	21%	20%	31%	24%	22%	18%	17%	20%	21%	21%	24%
...be required by law to provide information about the environmental impacts of their business.	47%	22%	30%	33%	35%	32%	43%	37%	34%	29%	31%	32%	35%	33%	31%
...be required by law to prove they are paying all garment workers who make their products a fair, living wage.	39%	28%	36%	43%	40%	34%	45%	40%	40%	34%	32%	38%	38%	34%	29%
...publish which factories are used to manufacture their clothes.	44%	37%	34%	33%	37%	38%	34%	40%	36%	36%	38%	35%	37%	39%	44%
...publish which suppliers they use to source the fabrics and raw materials used in their clothing.	34%	29%	34%	26%	31%	30%	30%	32%	29%	30%	32%	30%	32%	29%	32%

COMMENTARY ON THE RESULTS

According to all respondents from the V4 countries, the least important thing the government should oblige fashion brands to do is to communicate the social impact of business. They agree that the government should ensure the protection of the environment at all stages of production and sale through legislation. 43% of Hungarian respondents agree that fashion brands should be required by law to prove they are paying all garment workers who make their products a fair, living wage and they should respect human rights (33%), too. Slovak and Hungarian respondents are less likely (18%) to expect fashion brands to be forced by legislation to share information on social impacts.

CSR activities make a big contribution to a company's reputation and create a positive image in the eyes of consumers, so it companies benefit from participating in such projects. People support sustainability efforts and demand environmental and social change. Last but not least, sustainability increases customer capital, brand capital, relationship capital and is an important competitive advantage for fashion brands. Improving sustainable consumption in the fashion industry should be a government objective.

CSR strategy can be refined and fit into ESG (Environmental, Social and Governance) criteria used to check an impact a company's overall sustainability, which, however, is difficult to measure in the case of small or medium-sized sustainable fashion brands. But it becomes increasingly clear that they have strong internal and ethical values and constantly work on bringing change into the society and take a stand on debated issues such as inequalities, protectionism, fairness, lack of transparency, and accountability. Sustainability is reflected in the operational and strategic decisions.

There are laws designed to tackle more specific environmental issues, too. Extended Producer Responsibility laws are already in place in countries like France and Sweden—making brands responsible for paying for the collection, sorting, and recycling of textiles. And a potential new set of EU rules could mean brands have to use certain percentages of recycled materials, or ditch materials which are hard to recycle. In addition, the Packaging and Packaging Waste Directive will oblige all EU Member States to set up extended producer responsibility schemes for packaging by 2024.

KLAUDIA PÖLZ

07

Information or info is the resolution of uncertainty, or a collection of related data or knowledge about a topic. Access to information is the ability for an individual to seek, receive and impart information effectively. Disinformation is false information deliberately spread to deceive people. It is sometimes confused with misinformation, which is false information but not deliberate.

INFOR-MATION

29%

of people in age 16-24 would like to know how their clothes were manufactured.

The right to information is one of the basic consumer rights. In the era of incredibly advanced digitisation, people should have easy access to reliable information about the basic characteristics of clothing. The seller should specify them in detail so that we can make an informed decision when shopping. Information is what helps us make decisions in line with our beliefs and values.

Obtaining insightful information about products in the fashion sector can be very difficult and complicated. The clothing production process and supply chain activities are confusing and partially undisclosed. Therefore, it is all the more important that we have at least basic data. These are primarily the properties of a product, its price and directions of use. Any information provided to consumers must be clear and understandable and must not be misleading.

Unless we have a garment made by an honest and responsible brand which is not afraid to share details of their production, there are not many ways of really knowing the origins and the journey of purchased clothes.

The fashion industry has very little transparency. To tackle this issue, Fashion Revolution started to rank the transparency of the biggest fashion brands in their Fashion Transparency Index.

The Fashion Transparency Index analyses and ranks 250 of the world's biggest fashion brands and retailers based on their public disclosure of human rights and environmental policies, practices and impacts, in their operations and supply chains.

The Fashion Transparency Index is composed of 246 indicators covering a wide range of social and environmental topics such as animal welfare, biodiversity, climate, due diligence, forced labour, freedom of association, gender equality, hazardous chemicals, living wages, purchasing practices, supplier disclosure, waste and recycling, working conditions, and more. [24]

24 www.fashionrevolution.org/about/transparency/

HELENA TOVÁRKOVÁ

Executive Director of environmental and community foundation
Nadace Veronica

Young people care for the environment, women buy more clothing than men, people with lower income shop in second-hand stores, organic/fair trade is for the rich, etc. Although traces of these „common sense" stereotypes may be found in the consumer data from the poll, a somewhat deeper analysis shows us it isn't that one sided. These nuances demonstrate that we shouldn't fall for simple polarisations and that we should rather find positive consumer practices all around us, looking at people of different age, gender, or income. And once we find a common ground, we need to take action to articulate and push those shared demands on the government/corporate agenda and make them legally binding so that we don't have to navigate ourselves through policies/reports to make our mind about a brand or a purchase.

Making the fashion industry environmentally and socially conscious is strongly associated with providing more information, thus enhancing the transparency and accountability of the brands. Yet in a world overflowing with information, are we that eager to look for any extra data? Not really. When choosing whether a brand should be legally required to protect the environment / human rights or to publish information about its environmental impact / factories / wage policies, we prefer the former to the latter. This goes hand in hand with consistent and solid support for stronger government involvement in regulating production and providing assistance, oversight and education.

How can we get there? To spare ourselves the trouble of checking various certifications/rankings in the long term, we need to put some work into it in the short term. Either by ourselves: by signing petitions, getting involved in campaigns or simply voicing our demands to the political representatives / brands, or by proxy: by supporting NGOs / initiatives at a local / European level that will push for legal standards and government control on our behalf.

Until we get there, let's use the cross-generational gap to our advantage. Younger age groups showed more interest in acquiring information provided by brands. This may speak of both heightened sensitivity towards the environment/ human rights and of greater ability to navigate the data provided by brands. In a family, at a workplace or within any other mixed-age collective, younger people can take it upon themselves to filter and analyse information and pass it on to the more mature group members and introduce them to new tech (online platforms to buy/ sell, innovative/recycled materials, upcycling). In exchange, they can benefit from the older generation's skills in taking care of their clothes (repairing, buying less, making clothes last). As organisers of campaigns or events, we should plan them with such a cross-generational (and cross-gender and cross-income) approach in mind, so that different groups may be engaged, sharing and learning at the same time.

39%

of people in with income below 500€ would like to know what percentage of the price is the manufacturing and shipping cost.

The overall aim is to directly contribute to meeting target 12.8 of the Sustainable Development Goals framework:

"ensure that, by 2030, people everywhere have the relevant information and awareness for sustainable development and lifestyles in harmony with nature".

FASHION REVOLUTION
CONSUMER SURVEY REPORT 2020

Good information

Accuracy

Relevance

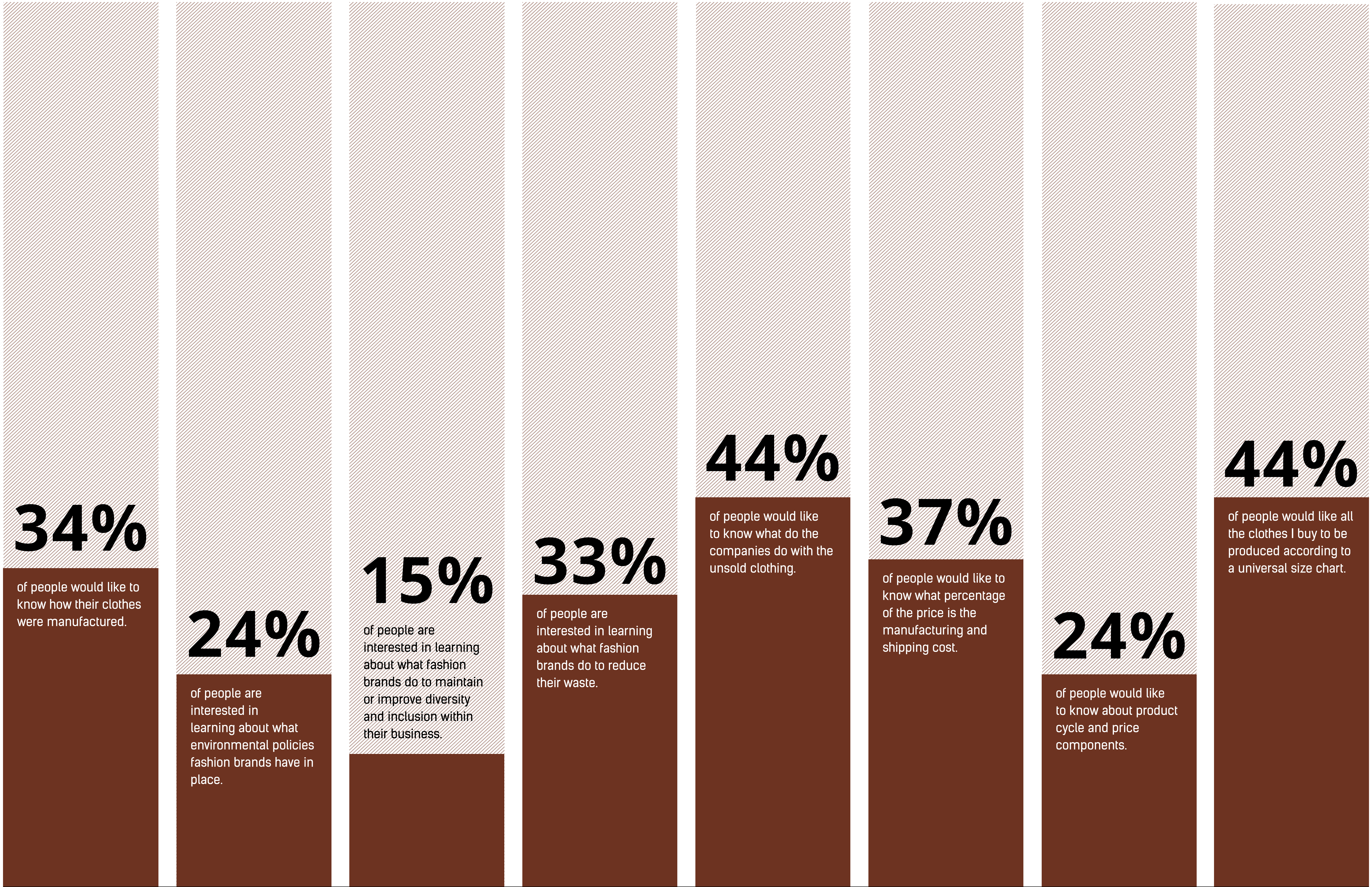
Validity

Reliability

Completeness

As a consumer, you have the right to ask:

Who made my clothes?	How do I dispose of clothes or put them back into circulation?
What's in my clothes?	How does the brand manage its waste?
Where are my clothes made?	What does the price I pay include?
What impact has the production of my clothes had on the environment?	How to take care of clothes to be able to wear them for as long as possible?
What to do with clothes when they are no longer usable?	What are my rights to complain?



Q7: When it comes to clothing, I...

Q7: When it comes to clothing, I...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...would like to know how my clothes were manufactured.	37%	28%	39%	31%	35%	33%	44%	38%	33%	31%	31%	33%	35%	32%	31%
...am interested in learning about what environmental policies fashion brands have in place.	34%	13%	22%	26%	26%	22%	31%	27%	24%	19%	23%	25%	23%	24%	25%
...am interested in learning about what fashion brands do to maintain or improve diversity and inclusion within their business.	22%	7%	16%	14%	16%	14%	22%	20%	17%	11%	11%	15%	16%	14%	16%
...am interested in learning about what fashion brands do to reduce their waste.	35%	24%	37%	34%	36%	29%	41%	35%	29%	32%	31%	32%	33%	30%	35%
...would like to know what do the companies do with the unsold clothing.	47%	34%	51%	44%	50%	38%	48%	49%	44%	37%	44%	47%	44%	41%	40%
...what percentage of the price is the manufacturing and shipping cost.	35%	25%	43%	43%	37%	36%	42%	40%	36%	32%	36%	39%	37%	34%	29%
...would like to know about product cycle and price components.	29%	21%	18%	27%	24%	23%	30%	27%	25%	22%	20%	24%	25%	22%	22%
...would like all the clothes I buy to be produced according to a universal size chart.	46%	45%	38%	49%	44%	45%	39%	38%	42%	46%	50%	42%	44%	48%	47%

COMMENTARY ON THE RESULTS

Only 34% of respondents would like to know how their clothes were manufactured. Even fewer of them are interested to understand which environmental policies fashion brands have in place and what they do to foster diversity and inclusion. From all the countries involved in the study, respondents in Czechia did not show interest in those aspects. Results demonstrate that fashion consumers do not ask themselves "Who made my clothes?" Furthermore, consumers in the V4 countries do not want to know if the company treats all employees equally around the globe, which shows that consumers accept the fact that the cheap labour force members, e.g. in Bangladesh, are not treated with respect and the same as other brand's employees.

One third of consumers are interested in knowing what fashion brands do to reduce waste, which is justified by the direction of more conscious and sustainable consumption patterns.

Regarding information, respondents are the most interested in knowing how fashion brands deal with waste and unsold clothing. Consumers become more and more aware of the huge amount of textiles ending up in landfills, e.g. in Africa or Asia, therefore they are more eager to ask fashion brands uncomfortable questions about their waste management systems. Moreover, consumers wish to better understand the cost structure of a piece of garment, meaning the percent of the price dedicated to manufacturing and shipping costs.

Almost half of the respondents would like to have a one standardised size chart. For the majority of consumers, sizing is challenging and hard to understand. Moreover, it seems to be one of the most important factors behind the high number of returns of online purchases.

07 INFORMATION

08

TOWARDS CHANGE

Innovation is an idea, production or adoption, assimilation, and exploitation of a value-added novelty in economic and social spheres; renewal and enlargement of products, services, and markets; development of new methods of production; and the establishment of new management systems (it is both a process and an outcome); a new or changed entity realising or redistributing value; a common element in the definitions is a focus on newness, improvement, and spread of ideas or technologies.

"Circular business models provide multiple revenue streams by enabling businesses to offer new services, such as restoration, customisation and tailoring. Revenue benefits include increased loyalty, access to customer and product use data and increased customer base. At the same time, costs can be reduced due to savings from better resource productivity and risk reduction." [25]

Traditional retail and consumer buying choices are being continuously challenged as the climate crisis continues to worsen. Currently, we are witnessing the emergence of various circular business models, which "can provide considerable greenhouse gas savings, and could be worth USD 700 billion by 2030, making up 23% of the global fashion market."[26]

Circular economy presents us with an opportunity to work smarter and more efficiently with raw materials, to protect both finite earth resources and biodiversity which we all depend on.

This transformation needs to happen in all of the fashion industry domains: the design, production, distribution, consumption and disposal of clothes and textiles. Therefore the role of consumer acceptance, education and willingness to participate in that change is very important. The change that circular business models are working towards concerns a switch from linear to circular models.

25 www.ellenmacarthurfoundation.org/fashion-business-models/overview

26 Ibidem.

PROF. DR. CHRISTIANE LUIBLE

Fashion & Technology
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At first glance, the results of the study are not a pretty picture. However, considering that, for the most part, environmental damage or bad working conditions are not something we witness first-hand on a daily basis, but are associated with far-away countries that produce fibres or with low-wage countries that make garments, much more education is needed to make people aware of the problems related to the production of clothing. From my experience, garment landfills in Ghana leave few people indifferent. Many people simply do not know the extent of the impact they exert by buying too many clothes and by buying garments that are not produced in a responsible way.

In terms of clothing use, the figures are more in line with what I have expected and read in other research studies. Above all, we can see that choosing second-hand clothes is becoming more and more standard (passing clothes on, shopping in second-hand stores, reselling). The survey shows that clothing is viewed in terms of ownership (renting is not a popular practice).

Regarding the purchase of garments, people unfortunately still rely a lot on cheap garments (67%) and less on responsibly produced garments. This is somehow confirmed by the sales figures of corporations and the success of super-fast fashion chains.

Again, it is astonishing that only between 30% and 43% of the respondents see the need for a change in their purchasing behaviour. Consumers are more likely to see governments as responsible. However, this is probably due to the fact that we are reading more and more about bad "greenwashing" stories in the media (Adidas and microplastics, Nike burning trainers, etc.). Consumers feel powerless in the face of misinformation from brands and want clear laws here.
It is, however, astonishing that 39% of people feel responsible for what happens to clothing at the end of its life cycle and would return it to the shops. This again supports the previous assumption that consumers are very much prepared to act if they are sufficiently informed and also see themselves in a position to act correctly.

59% **of people in age 55–74 bring or would bring back clothes don't wear anymore to the brand they bought it from.**

46% **of people with income below 500€ use platforms for selling and buying preowned clothes.**

41%

use platforms for selling and buying preowned clothes.

15%

of people do rent clothes or did rent clothes for special occasions.

4%

of people do rent clothes for daily wear.

39%

of people bring or would bring back clothes don’t wear anymore to the brand they bought it from.

18%

of people bring back clothes to the brand only when they offer a discount on new clothes.

Q8: What is your experience with circular business models in fashion (such as clothing rental, buying and selling pre-owned clothes via platforms, take-back schemes)? – I ...

08 TOWARDS CHANGE

Q8: What is your experience with circular business models in fashion (such as clothing rental, buying and selling pre-owned clothes via platforms, take-back schemes)? – I...	COUNTRY				GENDER		AGE					INCOME			
	PL	CZ	SK	HU	F	M	16-24	25-34	35-44	45-54	55-75	<500€	501-1000€	1001-1700€	>1700€
...use platforms for selling and buying pre-owned clothes.	53%	36%	33%	44%	51%	32%	50%	51%	43%	40%	34%	46%	41%	39%	33%
...do rent clothes or I did rent clothes for special occasions.	14%	11%	24%	9%	17%	12%	23%	18%	15%	15%	10%	13%	15%	15%	16%
...do rent clothes for daily wear.	6%	2%	6%	2%	3%	5%	5%	7%	5%	3%	2%	4%	4%	4%	7%
...bring / I would bring back clothes I don't wear anymore to the brand I bought it from.	34%	39%	40%	42%	39%	39%	34%	39%	37%	36%	43%	36%	40%	40%	38%
...bring back my clothes to the brand only when they offer a discount on new clothes.	18%	12%	14%	26%	15%	20%	20%	19%	18%	16%	17%	17%	18%	16%	20%

COMMENTARY ON THE RESULTS

The question was designed to find out about interviewed people's experiences with circular business models in fashion. Overall, the younger generation (people between 16–34 years of age) is more ready to engage in new ways of consuming fashion. **According to the survey, around 41% of respondents in all 4 countries stated that they use platforms for selling and buying pre-owned clothes.** Women use such platforms more than men. **Around 39% people bring or would bring back clothes they don't wear anymore to the brand they bought them from.** However, only 18% of people bring or would bring back clothes to the brand only when the brand offers a discount on new clothes. Only 4% of interviewees rent clothes for daily wear, while it is more popular to rent clothes for special occasions.

52% of Polish people use platforms for selling and buying pre-owned clothes.

24% of Slovak people do rent clothes or I did rent clothes for special occasions.

26% of Hungarian people bring back clothes to the brand only when they offer a discount on new clothes.

MANIFESTO OF FASHION REVOLUTION

1

Fashion provides dignified work, from conception to creation to catwalk. It does not enslave, endanger, exploit, overwork, harass, abuse or discriminate against anyone. Fashion liberates worker and wearer and empowers everyone to stand up for their rights.

2

Fashion provides fair and equal pay. It enriches the livelihood of everyone working across the industry, from farm to shop floor. Fashion lifts people out of poverty, creates thriving societies and fulfils aspiration.

3

Fashion gives people a voice, making it possible to speak up without fear, join together in unity without repression and negotiate for better conditions at work and across communities.

4

Fashion respects culture and heritage. It fosters, celebrates and rewards skills and craftsmanship. It recognises creativity as its strongest asset. Fashion never appropriates without giving due credit or steals without permission. Fashion honours the artisan.

5

Fashion stands for solidarity, inclusiveness and democracy, regardless of race, class, gender, age, shape or ability. It champions diversity as crucial for success.

6

Fashion conserves and restores the environment. It does not deplete precious resources, degrade our soil, pollute our air and water or harm our health. Fashion protects the welfare of all living things and safeguards our diverse ecosystems.

7

Fashion never unnecessarily destroys or discards but mindfully redesigns and recuperates in a circular way. Fashion is repaired, reused, recycled and upcycled. Our wardrobes and landfills do not overflow with clothes that are coveted but not cherished, bought but not kept.

8

Fashion is transparent and accountable. Fashion embraces clarity and does not hide behind complexity nor rely upon trade secrets to derive value. Anyone, anywhere can find out how, where, by whom and under what conditions their clothing is made.

9

Fashion measures success by more than just sales and profits. Fashion conserves and restores the environment and values people over growth and profit.

10

Fashion lives to express, delight, reflect, protest, comfort, commiserate and share. Fashion never subjugates, denigrates, degrades, marginalises or compromises. Fashion celebrates life.

The data was collated and analysed by Fashion Revolution Poland Research Group, Fashion Revolution Slovakia, National Fashion League Hungary Association and Fashion Revolution Czech Republic.

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www.visegradfund.org

This quantitative research was conducted by SW Research on the behalf of Fashion Revolution Poland in January 2023 (using the CAWI method). The research sample amounted to 4079 participants. The confidence level used for sampling operations was 95%. The data are representative in terms of age, gender, income and region. The survey was conducted in an inclusive way. 4 out of 4079 respondents identified their gender as "other" (representing 0.098% of all research participants). If you would like to review partial results that take this distinction into account, please contact us at: badania@fashrev.pl.

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