

Consumer Survey 'Fashion from Sustainable Forests'

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Content

01. About this Survey

02. Methodology

03. Key Insights

04. Detailed Findings

05. Implications for Brands

06. How Can Brands Address Consumer Expectations?

07. How PEFC Can Help

08. About PEFC



01. About this Survey

PEFC International has commissioned a consumer survey ‘**Fashion from Sustainable Forests**’ from **YouGov** aiming to understand consumer attitudes towards sustainability in the fashion industry, particularly focusing on the use of forest-derived fibres, also known as man-made cellulosic fibres (MMCFs).

Our findings highlight a clear demand for greater transparency and responsibility in fashion sourcing. Consumers are not just interested in fashion—they are committed to making choices that support a healthier planet. This is an opportunity for brands to lead the way in sustainable practices and gain trust by communicating their efforts effectively.

02. Methodology

Source

The survey was conducted by the **YouGov** analysis institute.

Sample & Target Group

This survey was collected on the YouGov Panels, where each member has accepted to participate in online interviews and has received an E-mail invitation with a link to the survey.

The sample definition is created in order to provide a representative cross-section in the UK, France, Italy and Spain population, based on the target group and the purpose of the survey.

Method Description

All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 5'329 adults in the UK, France, Italy and Spain. Fieldwork was undertaken between 26th April - 3rd May 2024. The survey was carried out online. The figures have been given an even weighting for each country to produce an 'average' value.

Weighting

The figures have been given an even weighting for each country to produce an 'average' value.

Data was weighted according to the dimensions of gender, age and geography on the basis of an ideal weighting from Statistics from the countries, so that the results are representative of the population in relation to the aforementioned target group.

03. Key Insights

74% of European consumers surveyed believe it's important that clothes made from forest-derived fibres, known as MMCF, are sourced from sustainably managed forests.

Only 25% of those surveyed believe that fashion brands are effectively addressing their concerns over the environmental impact of clothing made using forest-derived fibres.

Only 13% felt that brands give enough sustainability information regarding forest-derived fibres such as viscose or lyocell on clothing labels in store.

71% of consumers would like to see a label certifying that the forest fibres in fashion collections come from sustainably managed forests.

59% of European adults surveyed said they would be willing to pay more for a garment made from a certified material.

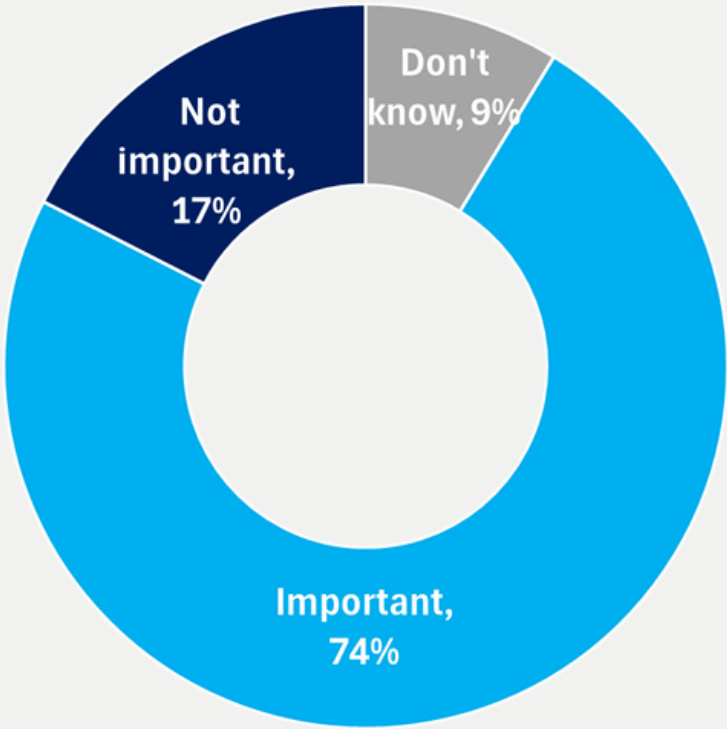




04. Detailed Findings

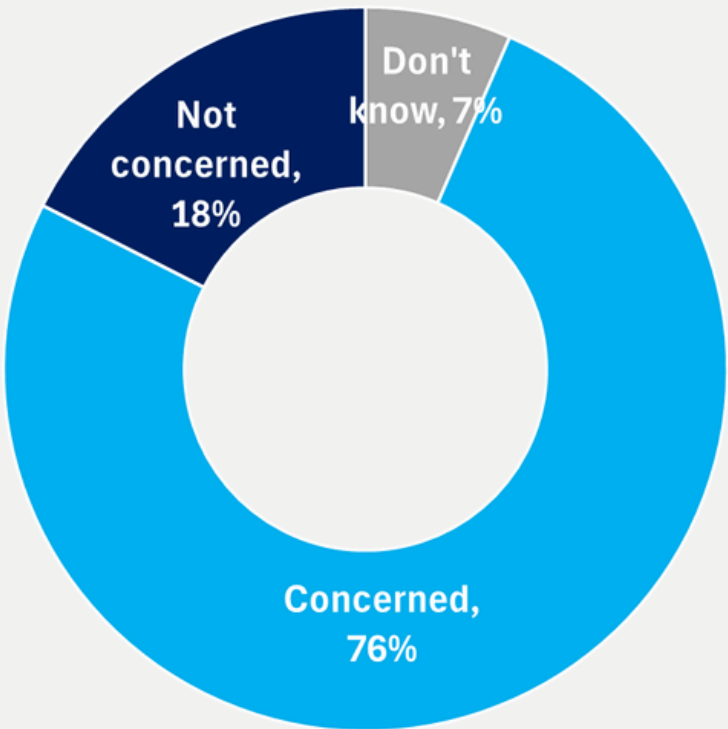
Nearly three-quarters (74%) of European consumers surveyed believe it's important that clothes made from forest-derived fibres (MMCFs) are sourced from sustainably managed forests.

Question:
To what extent, if at all, is it important, to you that clothes made from fibres derived from trees come from sustainably managed forests*?



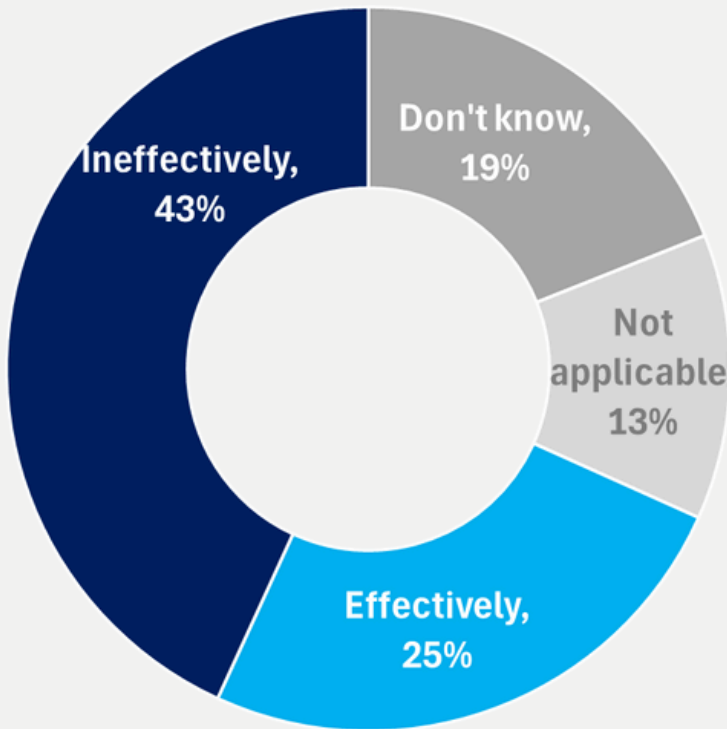
Three-quarters of adults surveyed (76%) would be concerned if forest-derived fibres in their clothes had a negative environmental impact such as deforestation, biodiversity loss and climate change.

Question:
To what extent, if at all, would you be concerned that some of the forest-derived fibres in your clothes had environmental impacts (such as deforestation, biodiversity loss and climate change)?



Only a quarter (25%) of consumers surveyed believe that fashion brands are effectively addressing their concerns over the environmental impact of clothing made using forest-derived fibres.

Question:
How effectively, if at all, do you feel fashion brands address your concerns around the environmental impact of clothing when designing new collections with forest-derived fibres?

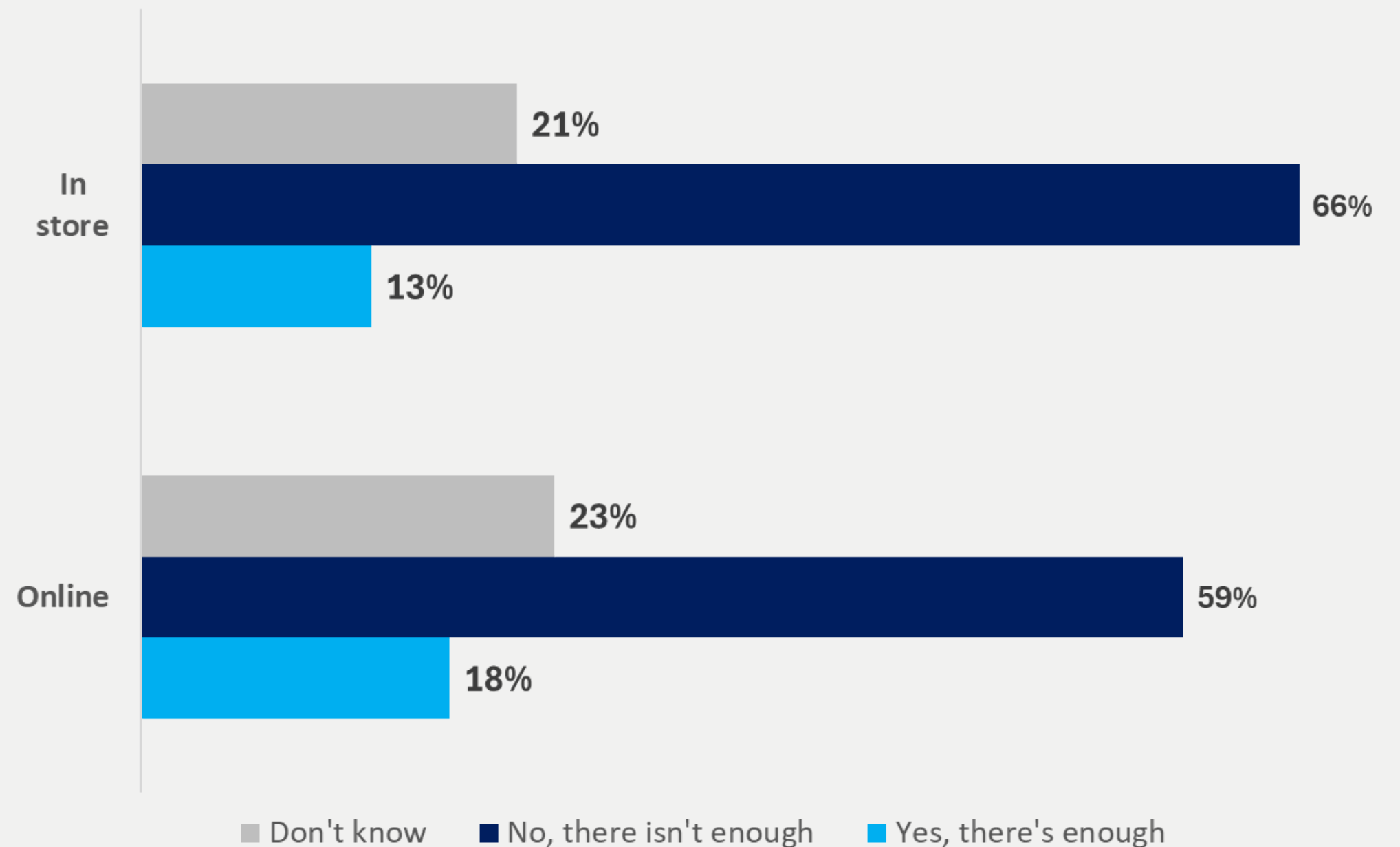


Only 13% of surveyed consumers felt that brands give enough sustainability information regarding forest-derived fibres such as viscose or lyocell on clothing labels in store.

And only 18% believe there is sufficient information online.

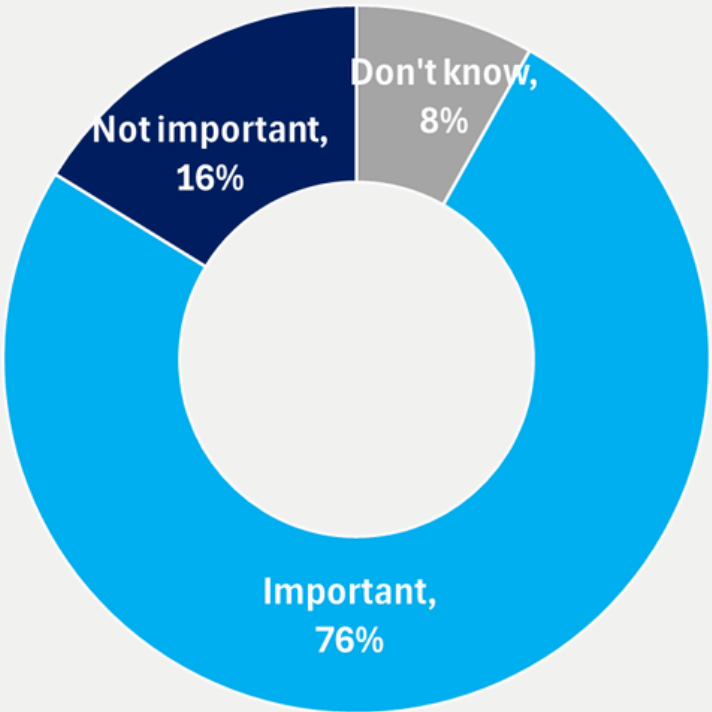
Question:

Do you think there's enough sustainability information regarding forest-derived fibres such as viscose or lyocell on clothing labels or offered by fashion brands, whether in store or online?



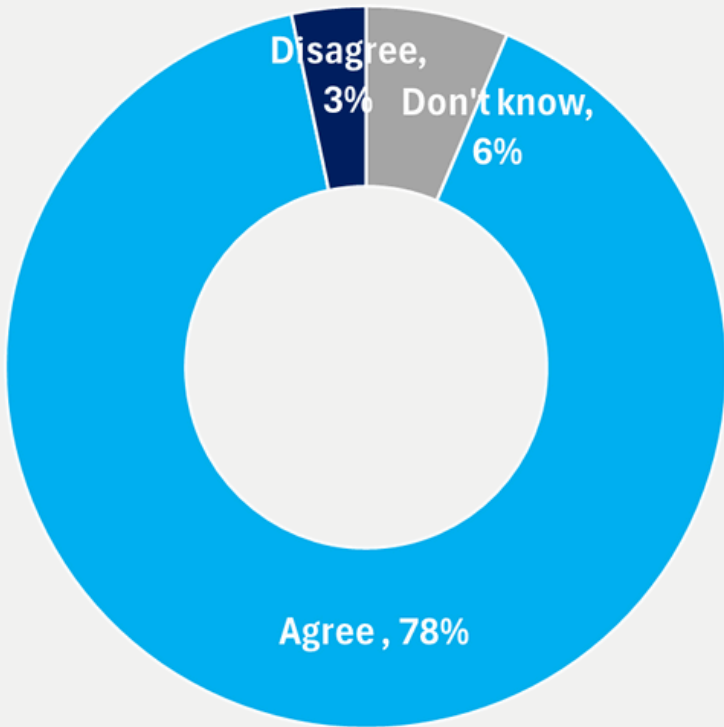
Three-quarters (76%) of adults believe it is important that brands know the origin of forest-derived fibres used in their collections.

Question:
How important, if at all, is it for you that brands know the origin of forest-derived fibres used in their collections?



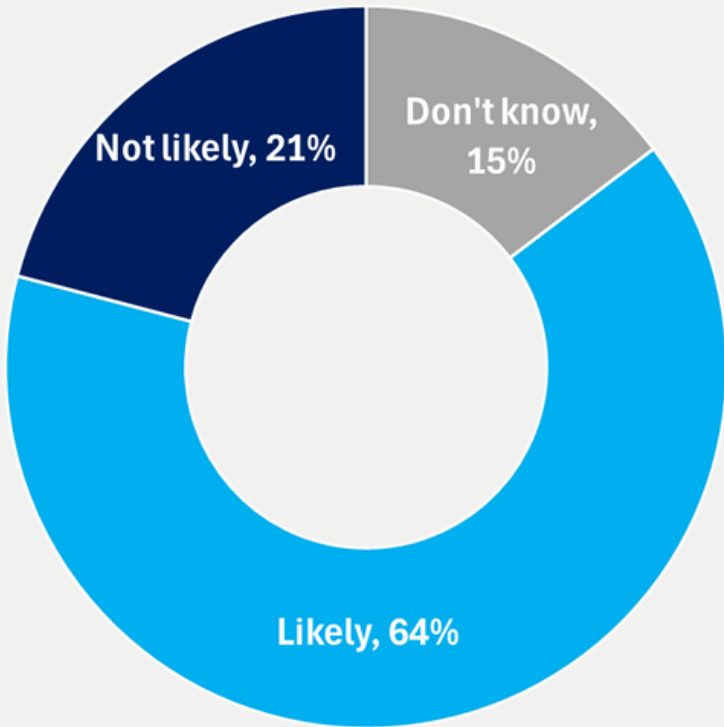
Over three quarters (78%) believe that fashion brands need to increase their sustainability efforts and responsible sourcing of forest-derived fibres for their collections.

Question:
To what extent do you agree or disagree with the following statement? Brands should increase their sustainability efforts and responsible sourcing of forest-derived fibres for their collections.



64% of consumers stated that sourcing from sustainably managed forests would increase the value of a brand.

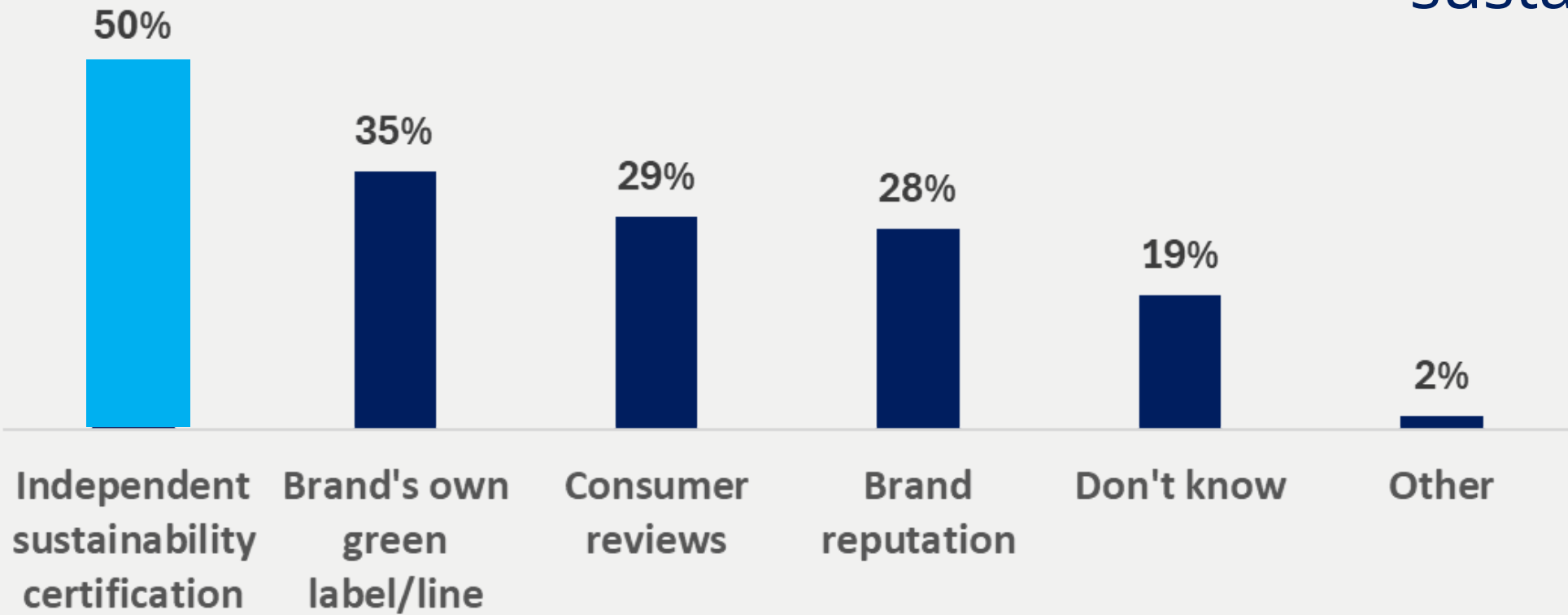
Question:
In your opinion, how likely, if at all, would sourcing from sustainably managed forests increase the value of a brand?



Question:

Which, if any, of the following factors would help to increase your level of trust for a brand making these claims? (Please select all that apply)

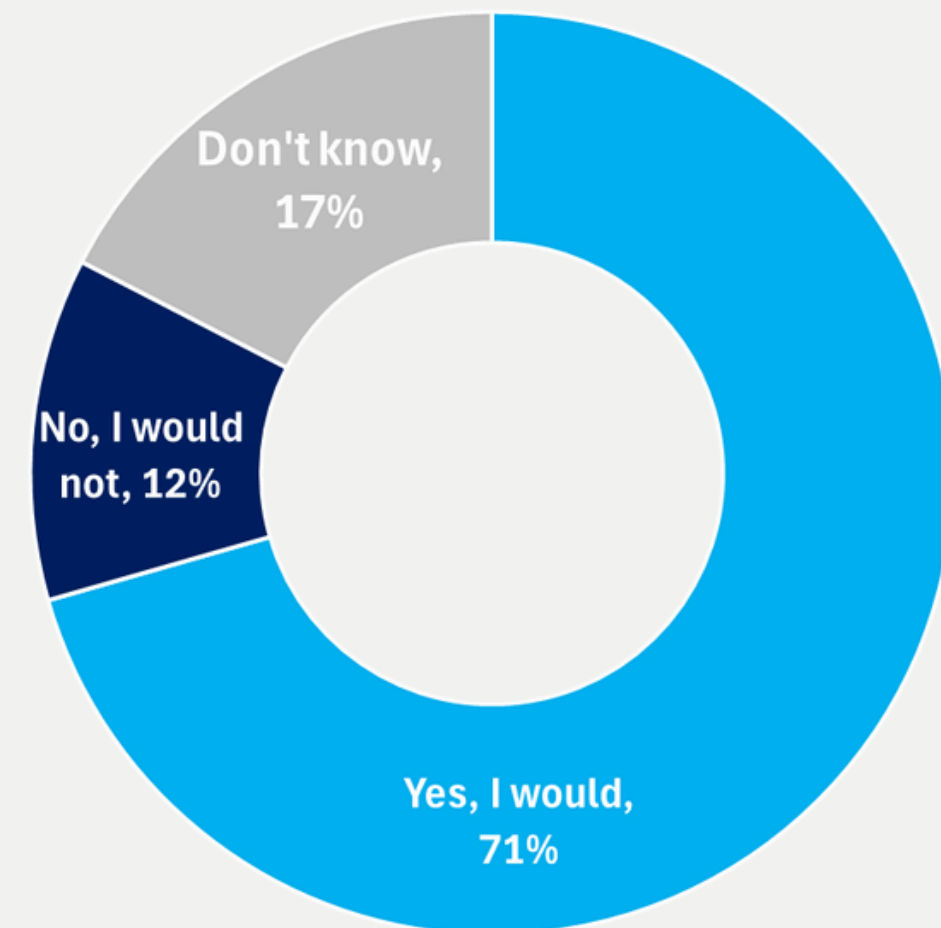
Independent sustainability certifications are important for consumers, results show **shoppers have more trust in independent certification labels (50%)** compared to the brand’s own sustainability labels (35%).



**71% of adults surveyed
stated that they would like
to see certifications**
confirming forest fibres had
been sourced from
sustainably managed forests.

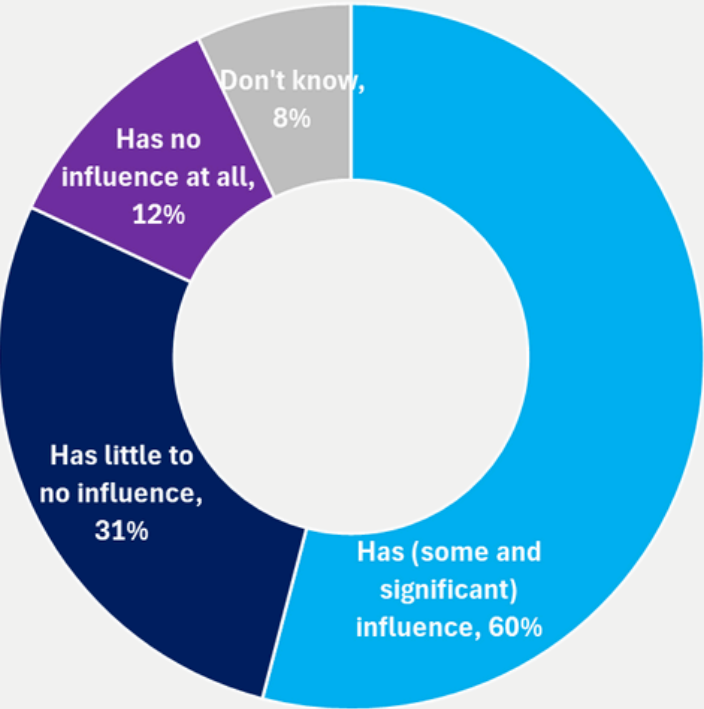
Question:

Currently clothing labels don't include assurance of sustainable sourcing for forest fibre clothing products...
Would you like to see a label certifying that the forest fibres in fashion collections come from sustainably managed forests?



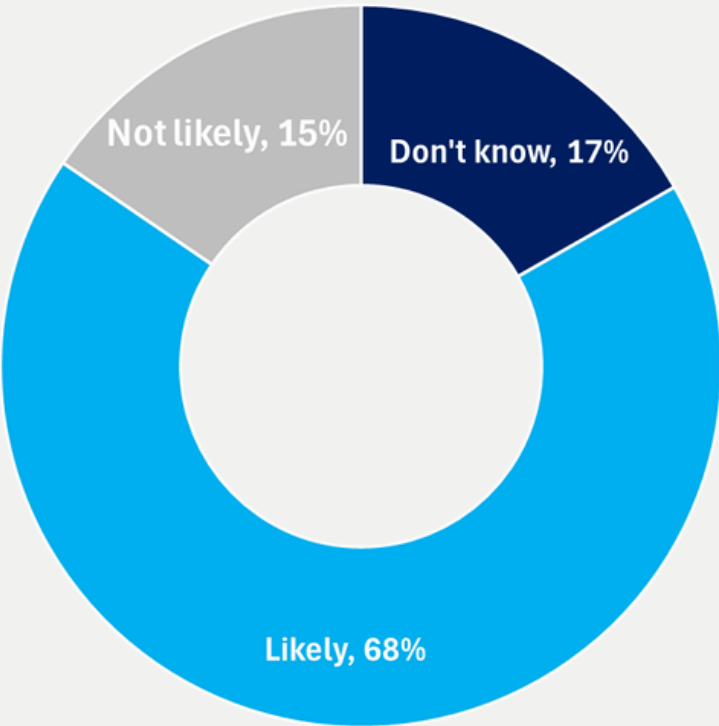
Over 60% said that the presence of a sustainability label on clothing positively influences their purchasing decisions.

Question:
To what extent, if at all, does the presence of a sustainability label on clothing items positively or negatively influence your purchasing decisions, or does it make no difference?



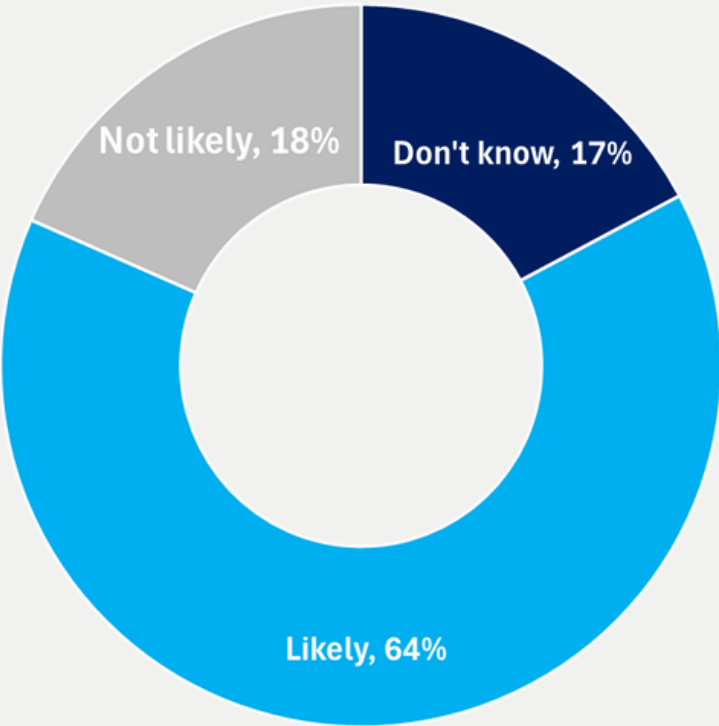
68% of adults surveyed stated they would purchase from brands that provide information about their sustainable sourcing practices.

Question:
How likely, if at all, would you be to purchase from brands that provide information about their sustainable sourcing practices?



64% stated that they would be likely to purchase clothing with certification labels verifying sustainably sourced forest fibres.

Question:
How likely or unlikely, if at all, are you to purchase fashion items with certification labels verifying that the forest-derived fibres come from sustainably managed forests?



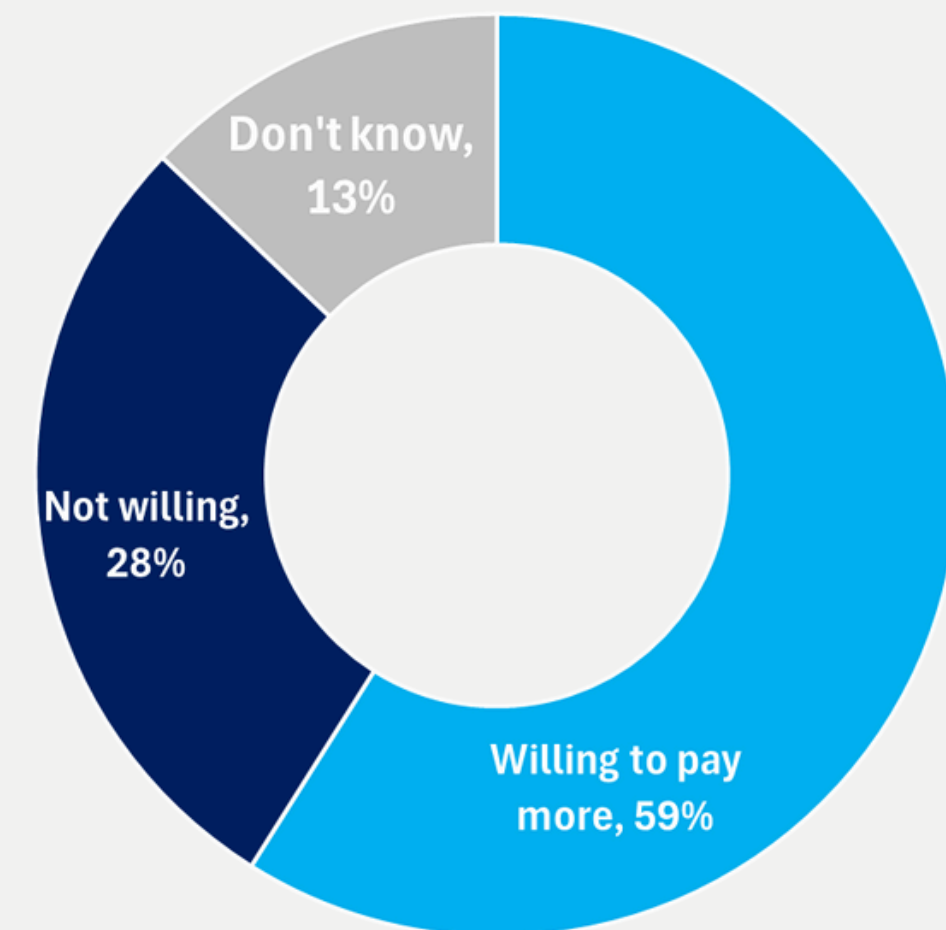
59% said they would be willing to pay more for a garment made from a certified material.

Moreover, 43% are willing to pay 10% or more.

Question:

Please imagine you was considering to purchase an item of clothing that has been made from a certified material e.g. Organic Cotton, Responsible Wool Standard, PEFC Forest Certification...

How much more, if at all, would you be willing to pay for this item, compared to if you were to purchase the same item of clothing without the certified sustainable material guarantee?





05. Implications for Brands

Opportunities for Brands




Brands have a significant opportunity to lead in sustainability by adopting responsible sourcing practices and transparently communicating their efforts with backed-up claims. By doing so brands contribute to mitigating risks, a positive impact on forests and strengthen their sustainability targets.

Consumer Expectations

Consumers expect transparency and credible information about the sourcing of materials used in fashion products. Meeting these expectations can build trust and differentiate brands in a competitive market.

06. How Can Brands Address Consumer Expectations?

Brands can take the following steps to increase their transparency and credible communication with consumers, as well as strengthen their sustainability targets and progress:

-  **Review your current sourcing policies for MMCF** materials and make sure your commit to sourcing only from sustainably managed forests, and set a roadmap to get there.
-  **Communicate these sourcing and sustainability requirements** to your supply chain and signal the priority on implementing third-party verification, such as through the PEFC chain of custody, on the fibres' origins. Which will enable credible and verified progress tracking and communication to the consumers.
-  **Start providing information to consumers** on your website about collections containing MMCF fibres, depending on the progress, either be transparent about your aspirational targets on MMCF sourcing, your current progress at the company level, and work towards having substantiated claims on garment level (on labels or online) to demonstrate that your fibres originate from certified sustainably managed forests.



07. How PEFC Can Help

Sustainable Forest Management

Our robust standards ensure that forests are managed sustainably, maintaining biodiversity, and ecosystem health, and contributing to the livelihoods of forest communities.

Chain of Custody Certification

PEFC Chain of Custody certification helps track and verify that forest-derived materials, such as MMCF, come from sustainably managed forests, eliminating controversial sources from your supply chain.

Credible & backed-up claims

Sourcing PEFC's Chain of Custody certified products will allow brands and retailers to make credible, third-party verified claims about the origin of forest-based materials in your products, enhancing consumer trust and brand reputation.

Read more about it: <https://treee.es/WP02>

08. About PEFC

PEFC (Programme for the Endorsement of Forest Certification) is an internationally recognized non-profit organization that promotes sustainable forest management worldwide. Created by small- and family forest owners in 1999, PEFC has grown to become the world's largest forest certification system.

PEFC forest certification ensures that forests are managed in accordance with rigorous international requirements, allowing for the regeneration of trees and the preservation of biodiversity and ecosystem balance.

In addition, PEFC offers the Chain of Custody certification for companies using wood-based products, which enables responsible sourcing by tracing feedstock from its origin to the final product and monitoring each stage of the supply chain through third-party audits. Brands can source PEFC-certified products to be able to make verifiable claims and avoid controversial sources in the supply chain.



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