

After the Binge, the Hangover

Insights into the Minds of Clothing Consumers



International Fashion
Consumption Survey

GREENPEACE

EXECUTIVE SUMMARY

Overconsumption of fashion is an international phenomenon

A new survey, commissioned by Greenpeace, of the shopping habits of people in Europe and Asia finds that regularly buying too many clothes, shoes, bags and accessories has become an international phenomenon. This is especially striking in China and Hong Kong, but is also widespread in Europe, with up to half of consumers buying more clothes than they need and use. Consumers are no longer shopping because they need something. On the contrary: younger people in particular shop despite already having too much, longing for fulfilment and encouraged by social media and the ease of online shopping. However, shopping doesn't make people happy as the excitement only provides a temporary fix.

Overconsumption of fashion is now deeply entrenched in our everyday culture, both in old European economies and in emerging ones such as China. In many ways, China is currently leading this trend, with more than half of Chinese consumers owning more clothes and bags than they need. Almost half of Chinese consumers buy **more than they can afford - and more than makes them happy**, and around 40 percent qualify as **excessive shoppers**, shopping compulsively more than once a week. Young, high-income women are the most vulnerable. The **spread of online shopping and social media** makes people even more susceptible to overconsumption.

These people are not shopping because they need something new - their motivation is the longing for **excitement, satisfaction and confidence in front of others**. Shoppers also seek to **release stress, kill time and relieve boredom**.

However, **shopping does not make them happy**: people already own too much and they know it. Around 50 percent report that their shopping excitement wears off within a day. A

third of the East Asians feel even more empty and unfulfilled afterwards. They also seem to know they are on the wrong path: around half of consumers are hiding their purchases from others, fearing accusations of wasting money or other negative reactions.

Shopping behaviour is widely influenced by people's social environment and media consumption. Social media platforms like Instagram, Pinterest, Facebook or WeChat in China are driving shopping mania, especially among young digitally connected East Asians. Browsing fashion blogs or following friends and celebrities triggers even more buying. After excessive shopping people experience regular tiredness and boredom - the binge is followed by a hangover.

About this survey

For this survey commissioned by Greenpeace, independent survey institutes Nuggets, TNS and SWG asked European and East Asian consumers about their shopping habits (China, Hong Kong, Taiwan, Italy, Germany) - how often, where and for how long they shop for clothing. We also wanted to know why they go shopping, what triggers them to buy new clothes - and whether they get fulfilled by doing so. All surveys are representative and were carried out between December 2016 and March 2017 amongst at least 1000 people aged 20 to 45 in China, Hong Kong, Taiwan, Italy and Germany.¹

About the Detox my Fashion Campaign

Since the launch of its Detox campaign in 2011, Greenpeace has been successfully fighting for a cleaner textile industry, with 79 global textile brands and suppliers committing to eliminate the discharge of hazardous chemicals from their supply chain by 2020. However, to protect our planet and our health we need to go a step further. We need to change the way we consume clothing and tackle our consumption habits and unsustainable lifestyles; we need to seek for happiness in places other than shopping malls and online stores.

Fashion always comes at a price - but in the 21st century this is paid by millions of exploited textile workers, mainly in Asian countries, and the planet.² The textile industry continues to grow and is an important water consumer and polluter worldwide. To produce cotton, viscose, polyester and other synthetic materials and blends, the textile industry uses natural resources such as water, oil, coal, cotton and wood. Energy from fossil fuels is consumed to manufacture clothes and transport them worldwide, contributing to climate change. The textile industry pollutes waterways and oceans with the approximately 3500 chemicals³ that are used for producing, dyeing, coating and softening fabrics, quite a few of which are hazardous for people and the planet.

Since more than 60% of our clothing consists of synthetic blended fibres,⁴ microfibres are a rising problem⁵ - tiny fibres are released from the garment during each wash, making up a big chunk of the household plastics that pollute the ocean and entering the food chain. After disposal, many clothes end up in landfills, where those made of synthetic fibres do not degrade, or they are downcycled.

By far the biggest factor for the environmental footprint of the textile industry is the rising

volume of clothes produced and consumed. Fashion retailers have been speeding up the turnaround of fashion trends since the 1980's. Brands such as Zara and H&M, which have both shown an "explosive expansion" since 2000, have become the largest clothes retailers in the world. The "fast fashion" promoted by these and other brands leads to increased consumption of all clothes. While in 2002 sales of clothing were worth \$1 trillion, this has risen to \$1.8 trillion by 2015 - and is forecast to rise further to \$2.1 trillion by 2025.⁶ This represents huge volumes of material - clothing production doubled from 2000 to 2014.⁷

At the same time, the average person buys 60 percent more items of clothing and keeps them for about half as long as 15 years ago.⁸ A throw-away mentality has developed in many societies that marks a sharp break from our previous attitude to clothes, which used to be cared for, shared and repaired. Instead, shopping and disposing of the latest trends has become a common pattern.⁹

The average person in North America bought 16 kg of new clothes in 2014 - the equivalent of 64 T-shirts or 16 pairs of jeans¹⁰ - compared to 6.5 kg per person in China.¹¹ Both countries are already exceeding the global average consumption of 5 kg/person, which could increase to anywhere between 11 and 16 kg per person by 2030. Even if the amounts per person remain the same, increases in the populations of countries such as China and India mean that the absolute quantities of clothing will continue to rise.¹²

It is therefore more important than ever to question our current overconsumption. Only by reducing our environmental footprint individually and pressing companies to turn away from the current fast fashion business models, can we reduce the impact of fashion and stay within planetary boundaries.

RESTLESS, COMPULSIVE AND UNFULFILLED THE CLOTHING CONSUMER

The global virus of overconsumption

In all the countries surveyed, but most strikingly in the emerging economies of China and Hong Kong, the **majority of respondents consume far more clothes than they actually need and use**. Two thirds of Hong Kong residents admit they own more than they need. The same is true for 60 percent of Chinese and over half of German and Italian respondents. Over half of the mainland Chinese and Hong Kong respondents and

40-46 percent of Taiwanese, German and Italian respondents have **brand new clothes with hangtags in their closets** that have never been worn. Despite this honest assessment, frequent shoppers continue to shop for clothes which they actually do not need.

The most affected personality: the excessive shopper

Some consumers are more affected than others - 41 percent of all Chinese consumers are found to be **excessive shoppers**, showing

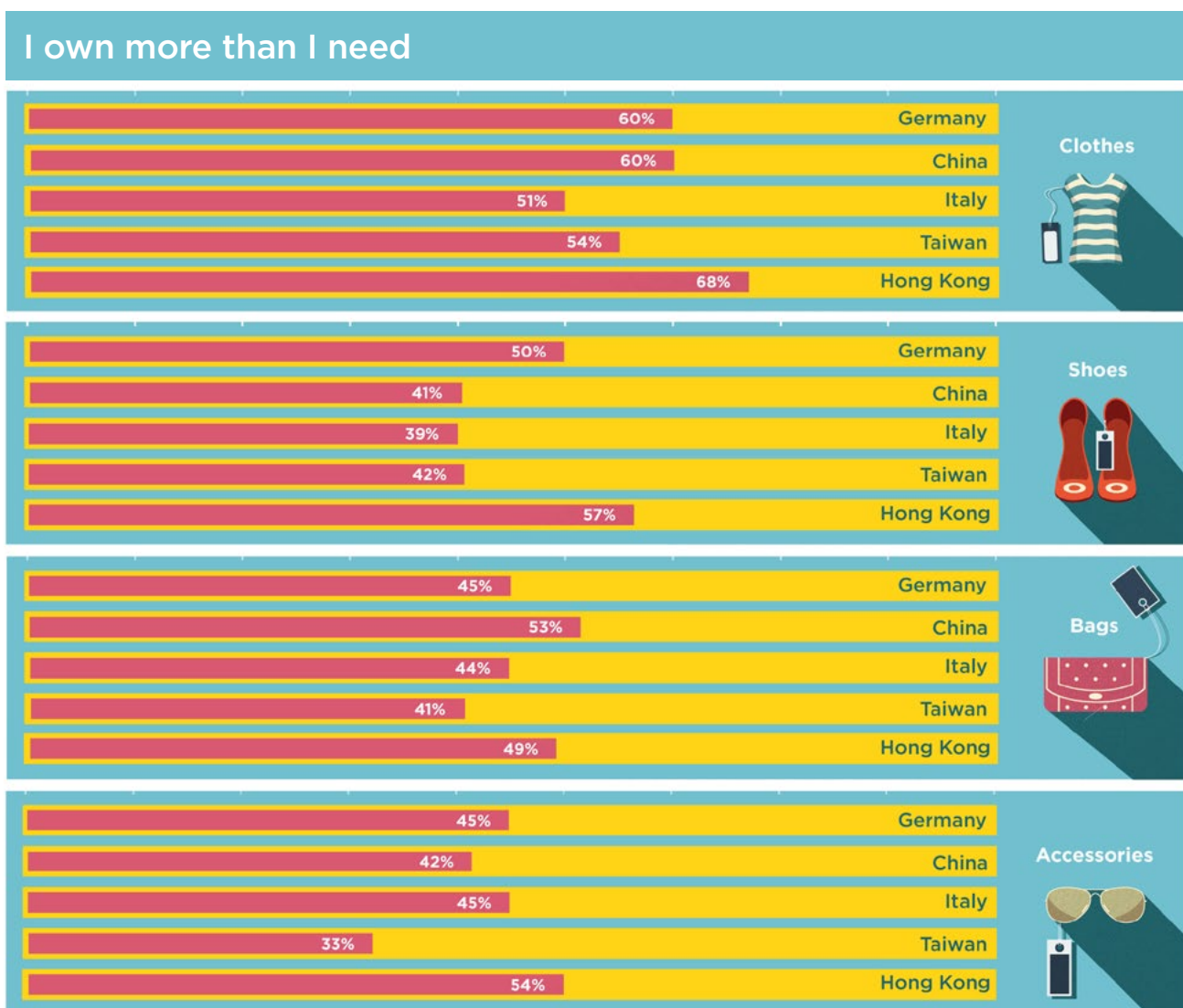


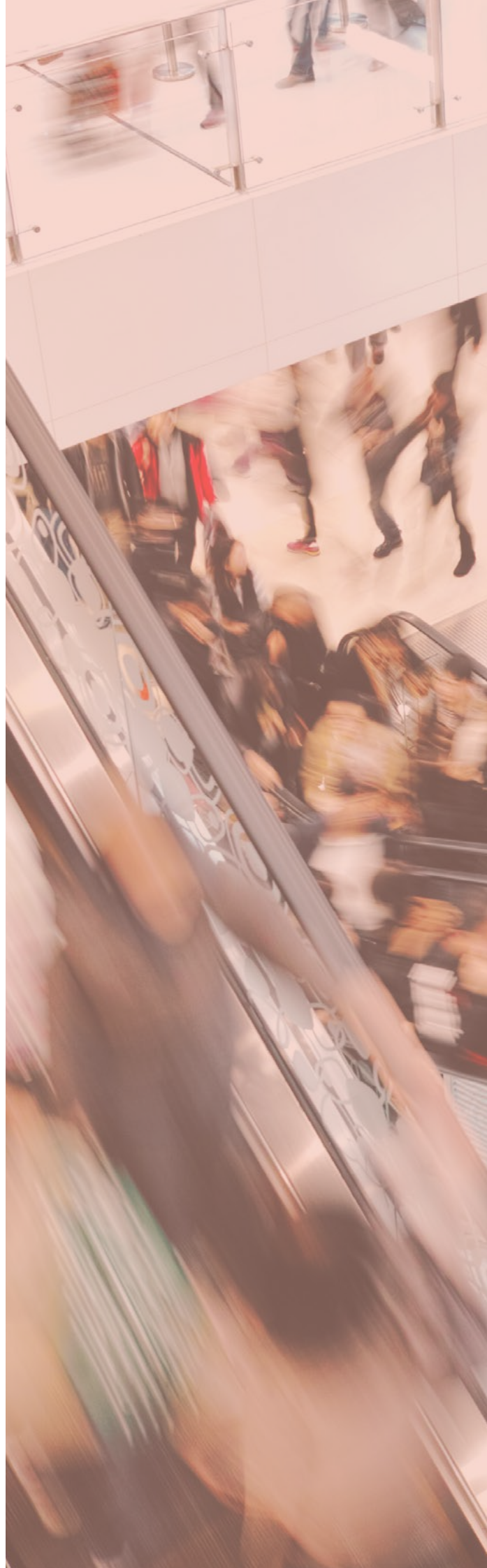
Figure 1: I own more than I need

traits of compulsive behavior.¹³ 59 percent of Chinese consumers report that they can't stop themselves making impulse buys even though they realize they are buying too much. A quarter of respondents in Germany, a third in Italy, 42 percent in Hong Kong and a staggering 46 percent in China admit that they often **buy more clothes than they can afford**.

While the average consumer buys clothes around once or twice a month, the excessive shopper goes for **less than one week without purchasing new stuff**. This applies to around 40 percent of respondents in Hong Kong and Taiwan, and women in China. Shopping is a time consuming habit: while the average Chinese consumer spends **two hours online shopping daily**, 11 percent of Chinese women in their thirties shop online for as long as three hours per day. Two thirds of Chinese and Hong Kong residents and 55 percent of Taiwanese are **shopping online even during class or work**.

When they are not shopping, around a third of the East Asians surveyed admit **feeling empty, bored or lost**. What's more, **around half feel guilty** about their shopping habits, sometimes hiding their purchases from others for fear of negative reactions or accusations of wasting money. Shoppers seem to be contradictory beings: they crave recognition and self esteem, but don't want to be judged for their purchases or for how much they spend.

Young people are most likely to be **excessive shoppers**. In China 40 percent of all respondents are excessive shoppers, with 58 percent of these young females (25-34 year olds). In Taiwan 12 percent are excessive shoppers,¹⁴ the majority of these being 25-34 year olds. In Hong Kong 17 percent are excessive shoppers, 43 percent of which are 25-34 years old. In Germany, the 18-24 year olds shop more often (the majority at least twice a month) and for longer (on average three hours).

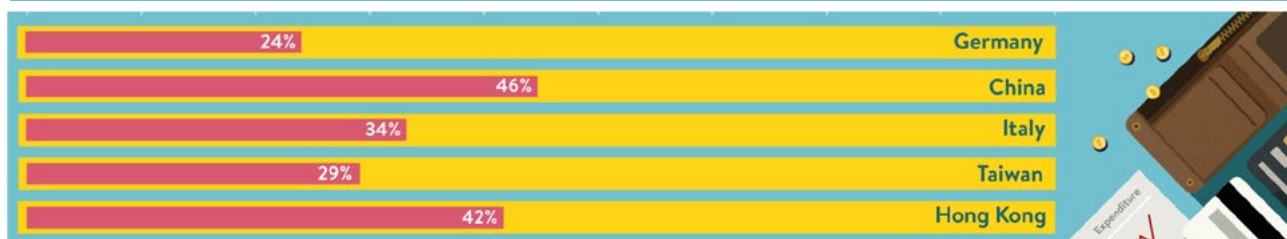


Social media and online shopping fuels the shopping craze

The survey data shows that social media platforms such as Instagram, Pinterest, Facebook or WeChat in China are driving the shopping mania, especially for young

digitally connected East Asians. Facebook and Instagram followers spend more money (on average 128,20 Euros per month) and time on clothes shopping. Browsing fashion blogs or **following friends and celebrities triggers the desire for impulse shopping** and leads to buying even more new outfits, according to 72 percent of the Chinese respondents, as well as almost two thirds of Hong Kong

I buy more than I can afford



Main drivers for overconsumption

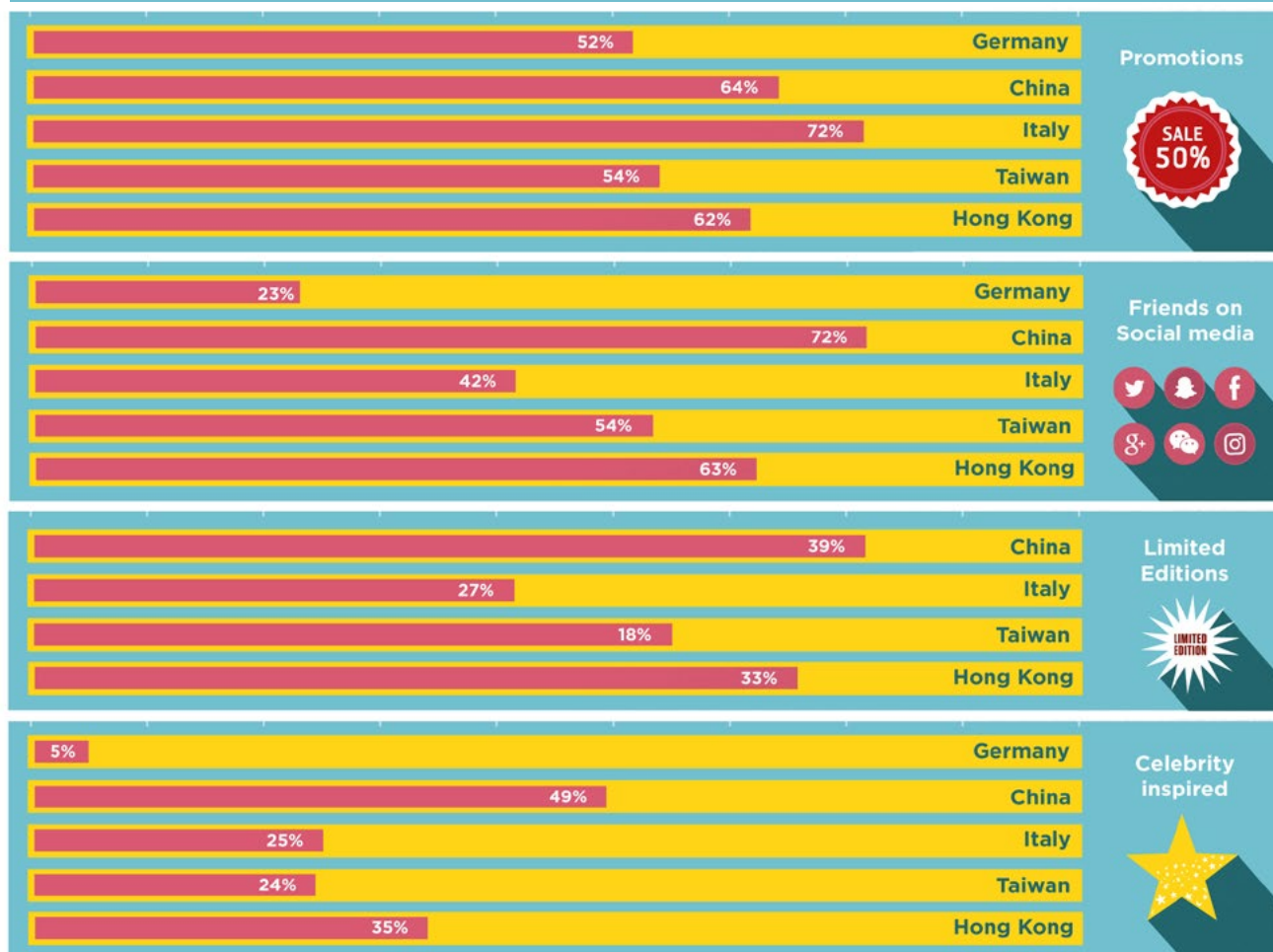


Figure 2 (top) : I buy more than I can afford Figure 3 (bottom) : Answer in HK/TW/IT/CHN: "I buy more than I can afford", GER: "I often set myself a financial limit how much I want to spend, but I rarely manage to keep that limit"

FOOD FOR THOUGHT

How the rise of social shopping contributes to overconsumption

Social media trends were not surveyed, but other data shows that the merger of e-commerce and social media is amplifying the fast fashion trend. Sales of clothing online in the US are expected to grow at a rate of 17.2% in 2016-17.¹⁵ China overtook the USA as the world's largest digital market in 2014, with fashion the biggest e-commerce category.¹⁶ In China, more people use their phones for their daily business than anywhere else in the world, including mobile payments and shopping. Shopping functions are integrated into popular messenger platforms like WeChat, that merge following friends, browsing the internet and shopping into one single experience.¹⁷

If Asia is spearheading market developments based on higher mobile and online connectivity, we can anticipate a similar development in western countries very soon. Learning from its Asian counterparts, Facebook is already working on adding payment functions that link the user's credit card to its messenger app. Pinterest is launching a shopping cart function allowing consumers to buy from multiple merchants with one cart,¹⁸ while Snapchat and Twitter are working on the integration of shopping apps as well.

Psychologically, this makes shopping harder to resist. To resist peer pressure and the influence of role models, while at the same time being subjected to one-click-buy temptations requires new competencies that many people are lacking.

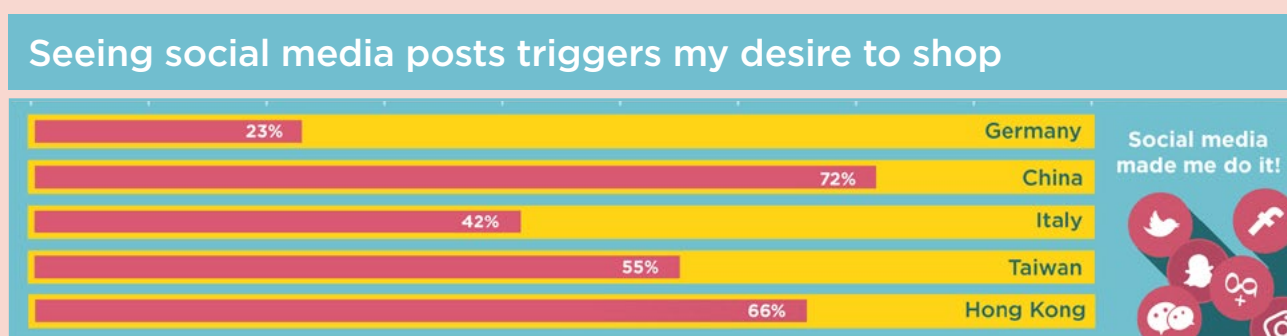
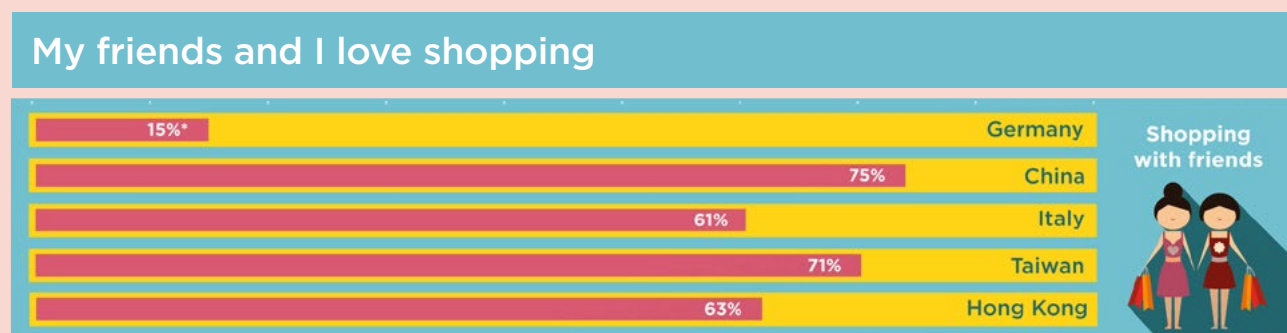


Figure 4 : Seeing social media posts triggers my desire to shop



* The question in Germany was posed in a much harder way, Germans were asked "Viele meiner Freunde und Bekannten sind shoppingsüchtig",

Figure 5 : My friends and I love shopping

Shopping for happiness

A wide variety of psychological needs motivate people to go to the shops or online sales platforms to overfill their closets. Shopping for clothes is an integral part of everyday consumer culture. People don't shop because they need new clothes or shoes - much rather, they buy them because they are **striving for more recognition, confidence, excitement and happiness**.

The survey data shows that while 39 percent of Germans feel excited after shopping, a staggering 76 percent of Hong Kong people and 65 percent of Chinese sense a feeling of satisfaction after buying something.

There are many other reasons why people go shopping. Most people state that good-looking clothes enhance their self esteem (in China 93 percent) or their status (75 percent). At the same time, two thirds of Chinese hope to release pressure or just to kill time and reduce boredom by going shopping. The data also shows that having friends and family who love shopping will entice people to shop more. **Shopping is a social pastime**, and especially in East Asia, serves also a means of **expressing the meaning of a relationship** via gift giving.

External impulses also play an important role, such as bargains, celebrity endorsements or social media posts. Promotions such as "3 for the price of 2" sales or free delivery trigger people into buying new things even if they don't need it; this is the case for 72 percent of Italians, 64 percent of Chinese and over half of Germans or Hong Kongers.

FOOD FOR THOUGHT

Marketing, pricing and advertising tricks

Excessive consumption does not happen by itself: it is actively encouraged by fashion companies via media, advertising, clever marketing and pricing. Billions of advertising dollars¹⁹ are spent by the fashion industry alone each year to drive consumers and especially women into believing that we need their products in order to be beautiful, fulfilled and happy. Marketing, pricing²⁰ and advertising are used to trigger people's shopping impulses. Fast fashion's business model relies on lowering the price of garments to a threshold, so buying on impulse becomes low-risk. Companies such as Primark²¹ have been dumping prices so low, they can no longer even be sold online as the shipment costs would exceed the value of the garment, enticing high volume, high turnover shopping.

Bargains are the main driver for special shopping festivals such as Black Friday or Singles Day in Asia. Other tricks include producing artificial scarcity via special promotions, limited editions, temporary pop-up stores or shopping events.

What is more, marketing has created the fabric of our current consumer culture, with advertising directly influencing and working with our psychology, our body image²² and our ways of creating relationships with others. Marketing has appropriated cultural trends, commercializing human creativity and identities.²³ Instead of promoting the real substance of goods, advertising is wrapping up products with emotional stories. These appropriate the human desire to be connected to and loved by others, connecting the arousal of emotions such as awe, pleasure, excitement, love and happiness with a story of consumption.²⁴

Social media marketing is marking a new era of advertising, with more brands and agencies using celebrities, influencers and so called micro influencers to target their audiences with their consumption incentives wrapped in real social connections.²⁵

Binge followed by hangover

Contrary to the elusive promises of fashion advertising, **shopping and owning more clothes does not make people happy**. The immediate excitement of purchasing won't last for long. Shopping happiness seems to be a rather fleeting feeling: around half of German, Taiwanese, Hong Kong and Chinese respondents admit that their **shopping cheer wears off**

within less than a day. To make things worse, the shopping binge is even followed by a hangover. About sixty percent of Germans, amongst them many young women, feel tired and depleted after shopping. About a third of Asian consumers feel even emptier after their shopping excitement fades away.



Figure 6 : Shopping hangover in Germany



LESSONS LEARNED

Growing awareness - you can't buy happiness

While people seek happiness and self worth by shopping, the survey results show that they are deeply ambivalent about their own behaviour. Stating guilt and shame, people often feel bad about their own useless purchases and overspending habits. Many people realize that shopping does not lead to increased happiness in the long term. Excessive shoppers experience emptiness and boredom in between shopping periods, with feelings of restlessness and dissatisfaction fuelling their desire for further shopping experiences.

People around the world have already reached the point where closets are cluttered with cheap trends from yesterday that are no longer wanted and used. US and European markets are saturated. Second hand shops and markets are overflowing with unwanted clothes.²⁶ In this context, continuous shopping is now increasingly perceived as a questionable, unsustainable behaviour.

Already, there is a counter-movement to overconsumption on the horizon. Some people are questioning the consequences of their own consumption habits and reevaluating materialistic values. Not only are many people well aware that planetary boundaries and unfair working conditions in the industry mean that we cannot continue business as usual. They are increasingly seeking meaning and happiness in experiences and relationships rather than the consumption of material goods. With negative experiences of overconsumption rising, there is an underlying longing for physical and emotional durability based on real connections. Companies that take their customer satisfaction seriously should take note of these negative sentiments surrounding current shopping patterns and cater towards those real customers' needs.

Greenpeace calls for a radical change in the fashion industry

Greenpeace clearly warns against maintaining or even increasing our current level of overconsumption.

Fashion industry leaders and social media influencers need to **stop promoting the wasteful and broken narratives of micro trends and consumerism**, and instead, offer more alternatives that incorporate and emphasize values such as **caring, sharing and repairing our clothes**. Fashion companies should shift the focus of their dominant marketing narratives from convenience and short lived trends to the aesthetics of durability, longevity and quality.

Greenpeace urges companies to take their customer satisfaction seriously and **face up to the negative psychological impacts associated with current shopping patterns**. The business models of the future should aim to foster a deeper and longer-lasting connection to fewer and better clothes, which will engage their customers in a sustainable, valuable relationship.

It is not enough for fashion brands to sell their customers **placebo solutions that ultimately leave shopping patterns untouched and guilt free**. Take back systems, offering recycling options and investing in technological solutions, as well as stocking up on clothing recycled from plastic waste, are clearly an escape route that do not solve the current problem. Attempts to recycle textiles waste to “close the loop” are far from commercially viable on a larger scale,²⁷ and are currently not far reaching enough to tackle the environmental toll of our current fashion system.

The simplest solution to this is not producing, selling and buying so much. There is an urgent need for a radical system change towards **slowing down fast fashion and lowering high volume** approaches. Companies

need to **implement slowness and durability** into their future business models. While we welcome industry efforts to cut the waste of resources, promote recycling and attempt to “close the loop”, they do not go far enough and ignore the core problem, of the high volumes of clothing that continue to be produced.

- › **Product design strategies** need to be in line with environmental efficiency, preferring toxic-free, recyclable, renewable, high quality durable garments over solutions that depend on end-of-pipe technology
- › **Businesses need to increase their offer of services** such as repairing, recycling, lending and sharing and put making a valuable contribution to a sustainable future into the core of their business model

Greenpeace believes that **slow fashion can be innovative, profitable and sustainable**, making a real contribution to our shared future on this planet. There is potential to **engage customers in meaningful relationships** without encouraging unsustainable shopping habits which contribute to environmental damage. People seek meaningful and positive experiences - these can be provided by fashion companies who need to act now to position themselves.

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Authors

Carolin Wahnbaeck, Lu Yen Roloff

Lector

Madeleine Cobbing

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Hongkongstraße 10
20457 Hamburg

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