



EMPOWERING CONSUMERS THROUGH TRANSPARENCY

REPORT ON GLOBAL CONSUMER RESEARCH

MAY 2019

 Sustainable
Apparel Coalition

 Higg
Index

 GLOBESCAN

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INTRODUCTION

Foreword

Transparency

For the SAC, transparency means providing easy and public access to sustainability information about the value chain and products that is clear, complete, comparable, and trustworthy, with the intent to enable informed decision making and drive impact improvements.

Last year a group of brand, retailer, and manufacturer members from the Sustainable Apparel Coalition (SAC) and GlobeScan joined forces to investigate how the apparel, footwear, and textile industry can offer more meaningful transparency to consumers. We share a common belief that transparency is core to driving the change needed in the industry and to empowering consumers to make more sustainable choices. Despite increasing acknowledgement of the need for greater transparency, there remain gaps in the collective understanding of what kind of transparency is most meaningful and useful to consumers and what is needed to build trust in the information shared and the organizations sharing it.

This report summarizes the combined insights from a review of existing intelligence and new qualitative consumer research delving into many of these questions. In the following pages we cover how the industry is currently perceived, how this is reflected in consumer sentiment towards transparency, and what people want in terms of sector transparency. There are specific learnings for SAC and its members on how to communicate the Higg Index, a suite of tools that enables brands, retailers, and facilities of all sizes, to accurately measure sustainability performance. Part of SAC's vision is to enable its members to communicate Higg Index information transparently to consumers. This research offers guidance on how to best do this in a meaningful, engaging, and empowering way.

This report is designed to contribute to thinking and debate within the apparel, footwear, and textile sector, and beyond, and to stimulate greater collaboration on engaging consumers across the world through transparency. It has been commissioned by the SAC and written by GlobeScan.

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Key Research Questions

The research was designed to interrogate the following areas:

- What role does sustainability information play in consumers' attitudes and behavior?
- Do consumers understand, need, and value transparent sustainability information?
- What content and channels offer the greatest potential to build consumer trust in sustainability communications and specifically Higg Index information?



Methodology

In order to answer the above questions we hosted 12 consumer focus groups in 6 cities. Two groups were conducted in each of the following locations:

- Shanghai, China
- Chengdu, China
- Hamburg, Germany
- Düsseldorf, Germany
- London, UK
- New York City, USA

All focus group participants were mainstream consumers who like to shop and were neither sustainability-rejecters nor “deep-greens” in outlook. All of the focus groups followed the same overall structure and the majority of question areas. Participants had the opportunity to react to mock communications.

Through discussion, consumers initially shared their current thoughts, attitudes, and priorities regarding sustainability, and eventually they explored and reacted to different types of sustainability communications. Participants also had the opportunity to share their own ideas about how materials may better resonate with them.

SECTION 01

Consumer Context & Perceptions of the Apparel, Footwear, and Textile Industry

Consumers increasingly want to play a role in making fashion more sustainable

Our research uncovered tangible signs of increasing awareness and interest among mainstream consumers in the sustainability of their clothing choices. Many are already active, or want to be, in making choices based on issues they connect to personally, such as the use of organic cotton or the protection of workers' rights.

The greater profile given to sustainability-focused initiatives and communications from major fashion companies, as well as the increased profile of smaller, purpose-led fashion brands, is helping to fuel this interest.

But most people are not yet acting on their values.

Although many focus group participants agree that they are interested in the sustainability of their clothing, most acknowledge that they are not yet proactively seeking this information or making informed purchasing decisions. This reveals a values-action gap, whereby people would like to be doing more but they aren't yet empowered to live up to their intentions.

Many have ingrained concerns about how the apparel, footwear, and textile industry operates.

Despite growing interest, there remains a strong undercurrent of negative perceptions attached to the apparel, footwear, and textile industry, fueled especially in Europe and the US by negative media coverage around global value chains. For a notable number of consumers, the narrative of poor pay and conditions for workers is strongly embedded in the image of the industry. We also found increasing awareness of the impacts associated with "fast," "cheap" fashion – creating a surge in guilt attached to buying new clothes for some.

There is tension in what and who to trust.

This push and pull of positive and negative information has created a tension for some consumers in what to believe and who to trust. On the one hand, they are keen to see brands taking action, but on the other they question the extent, authenticity, and transparency of the actions taking place. At the moment, people are left with too many questions and not enough concrete answers.

"I am interested in it – the people element. I'd like to think if something was more expensive, then the people who are making it are getting more, but I'm not sure."

**CONSUMER, NEW YORK
AGE 35-50**

Consumer Trust Spectrum

There is a spectrum of how strongly distrust affects consumers' perceptions of the industry. At a broad level, we observed three main groups of people:

Resistant

This group is deeply skeptical, distrustful, and cynical regarding sustainability actions and transparency. Resistant consumers are more likely to believe information shared is “public relations spin” rather than authentic. They are less informed on industry actions and often led by assumptions and negative media stories.

Receptive

Sustainability topics are not top-of-mind, but awareness is growing, and expectations of brands are rising. Trust is an issue, and brands have yet to change the overall negative image associated with the value chain for many, but this group is keen to find out more about what actions are taking place.

Engaged

For this group, sustainability is an important personal identifier, which apparel brands they want to associate themselves with (financially and culturally). Open consumers often articulate how sustainability plays off against other factors in their shopping decisions. But they are still not 100% trusting – especially when it comes to larger brands. They require clear, authentic information on which to base decisions.

“It is a fact transparency leads to accountability and serves as a catalyst for positive change in our fashion industry. Knowledge about where and how products are made enables consumers to make a more informed purchasing decision. The data brands provide needs to be universal, meaningful, and clear. This pilot enabled us to better understand how specific levels of exposure to data and information are understood and valued by our consumers. The report has added to our understanding of what type of transparency efforts are more meaningful and useful to consumers worldwide. It also gave us insight into what is needed to build trust in the information we share.

FROUKE BRUINSMAN,
CORPORATE RESPONSIBILITY &
COMMUNICATIONS DIRECTOR
G-STAR RAW

“I think about whether the material and quality are good. As for cotton, I am concerned about whether it is high quality cotton, and, if not, what damage it will cause to the human body when we wear it for long.”

CONSUMER, SHANGHAI
AGE 25-34

Interest is greatest when personal benefits connect with societal benefits

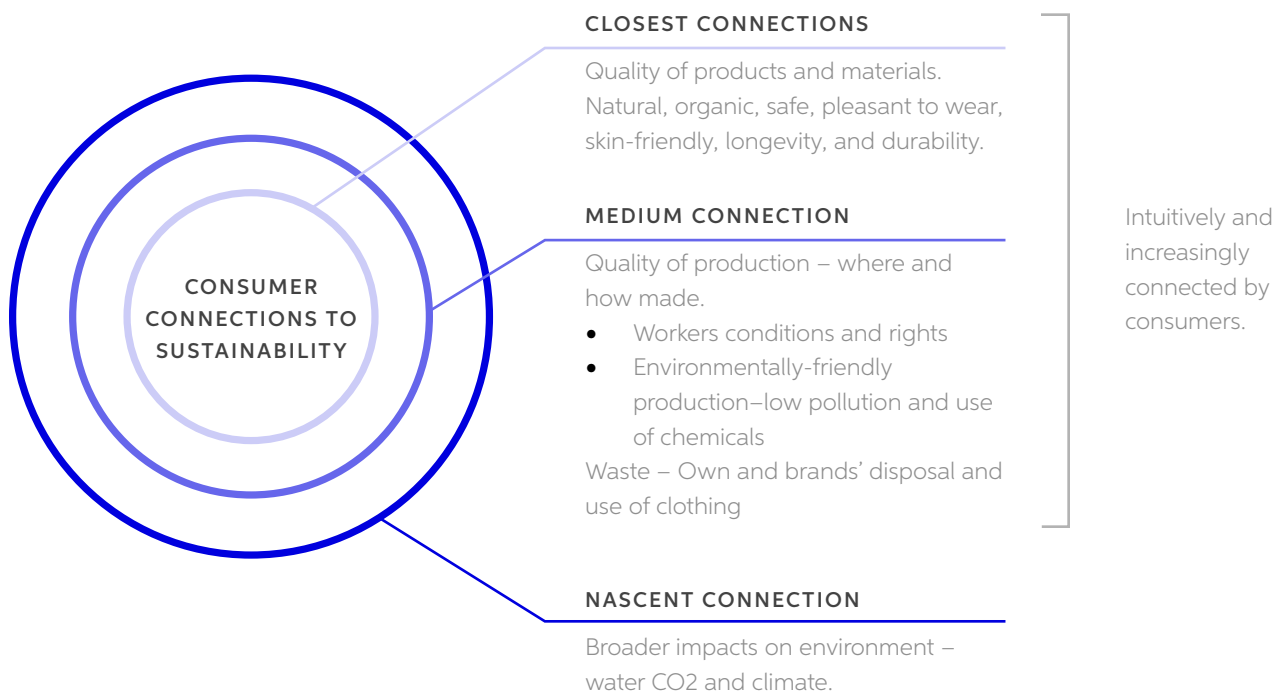
"I saw something online, a "Stacey Dooley Investigates" thing, and it was about the amount of water used to create one item of clothing, and it was hundreds and hundreds of liters of water for one jacket."

**CONSUMER, LONDON
AGE 35-50**

In relation to clothing, consumers care most about the quality of the materials and the products they purchase. Consumers connect quality with personal benefits of safety (avoiding chemicals), clothing that is pleasant to wear, and longevity, as well as the societal benefits of durability, lower waste, and an association with more natural production (e.g. organic cotton).

Workers' rights and conditions also matter to a large number in Europe and in New York. Currently, this topic isn't as prominent in China.

Currently, most consumers know less about the wider impacts of the apparel, footwear, and textile industry associated with energy, water, and climate, although these too are starting to gain media attention and concern is spreading.



Implications for Brands

- **The opportunity (and risk) is growing.** Rising awareness and expectations mean brands can increasingly stand out through demonstrating sustainability. Brands that don't take action risk losing relevance with consumers.
- **Rebuilding trust is vital.** For brands to get full credit for the actions and initiatives underway, the trust deficit needs to be addressed. To fight against the media narrative, there needs to be a stronger story of change from the industry.
- **Pay special attention to how personal and societal benefits overlap.** This is a good place to start a conversation with a broad audience about a brand's sustainability story.



“Transparency leads to accountability and is essential for credible engagement of consumers on the environmental and social benefits of their products and the brand’s sourcing approaches. In the global apparel industry, it is increasingly necessary that a consumer-facing product transparency approach is developed to provide a universal and simple way to enable consumers to make better purchasing decisions. C&A was a participant in the program to leverage our deep consumer insights on sustainability to support the development of the Higg transparency approach”

JEFFREY HOGUE, CHIEF OF SUSTAINABILITY
C&A

Why Transparency Matters

The challenge of low trust in business is well documented.

“Transparency is missing completely. You can say it’s produced in India, but can you look inside the company? You see a building...maybe 20 people are standing there, they are grown-ups, but everyone else goes out the back exit – the kids.”

CONSUMER, HAMBURG
AGE 18-34

“Things that are positively portrayed as supposedly changed are sometimes still just around the back. Scandals are still hidden.”

CONSUMER, LONDON
AGE 35-50

GlobeScan’s 2017 Radar global public opinion research shows that at a global level around half of people do not trust companies to act in the best interests of society and only 1 in 10 have a lot of trust.

We identified several perceptions relating to the apparel, footwear, and textile industry that are compounding distrust. Overcoming these concerns will require enhanced, industry-wide transparency.

- **Low visibility of progress.** There is a lack of visibility and clarity on the actions brands have taken to respond to media exposure of poor standards in certain factories and countries in their value chain. Therefore, many consumers believe things remain unchanged. These negative perceptions are reinforced when new stories surface about how things have been “hidden away” but still exist, such as child labor.
- **Concern about token efforts.** While some consumers highly value brands’ specific “sustainable” lines and initiatives, others question how far these values stretch across the business and believe wider performance is more opaque. The most cynical see these actions as a distraction from the real story.
- **Greenwashing and sustainability as a fad.** Some people also feel that sustainability efforts are driven more by improving image and see increasing visibility as part of a “marketing trend.” A sense of real values and action underneath is missing.
- **Justification for high prices.** For some, sustainable actions are seen as an opportunity for brands to charge more, even if their efforts do not justify higher prices.

"I usually look at where something is made. Some countries I really try not to buy from. Usually China or Bangladesh because I know they have pretty low worker standards, which is not very good."

CONSUMER, NEW YORK
AGE 35-50

"It is often just more marketing to present oneself more positively and to say, 'we also do something good'. But how good is not really transparent."

CONSUMER, DUSSELDORF
AGE 18-34

- **Uncertainty about specific source countries.** There is a recurring theme in the belief that garments made in certain countries cannot be high quality and are very unlikely to be made under good conditions or sustainably, even if claimed to be so. People also believe that all brands, despite price differences, use the same sources, with the same "low standards."
- **How much do brands know and show?** Some consumers question the traceability, accuracy, and trustworthiness of information at the manufacturing level. They wonder if the brand itself really knows or cares what is going on in other parts of the value chain, outside its direct control.
- **Overload of information.** People want to know more but reject transparency that overwhelms them or is not easy to understand. Some even feel that brands are "dumping information" on consumers, which results in consumers being unable to easily find the information that is most relevant to them. Counterintuitively, this can lead consumers to feel that brands are being deliberately opaque.



Implications for Brands

- **“Marketing” sustainability is not enough to build trust.** Brands’ communications about their initiatives are generating public interest, but stronger evidence of the changes underpinning these activities is needed to convince consumers.
- **Holistic action is needed at an industry level to shift perceptions.** It is clear from consumer feedback that negative perceptions are associated with the industry collectively, making it hard for individual brands (especially global ones) to set themselves apart. A more open approach is needed to prove that the industry acknowledges the issues, collective change is underway, and brands are not “hiding” the true story.
- **Raw transparency on its own will not engage consumers.** Pursuit of transparency as a goal in itself, transparency for transparency’s sake, will not help empower consumers to make sustainable choices. Transparency must facilitate the sharing of meaningful and relevant information in order to engage consumers effectively.



“We believe in providing our customers with more transparent sustainability information about the products they buy to help them make more sustainable choices. Since 2016, we have been testing ways to highlight products with sustainability information onsite, and we are continually working on making this information more relevant and accessible. This product was an opportunity for us to learn more about what our customers want to see, and explore how we can use the Higg Index together with our brand partners to drive positive change across the industry.”

JADE BUDDENBERG, SENIOR CORPORATE RESPONSIBILITY
MANAGER, ZALANDO

SECTION 03

What Consumers Want From Transparency

Principles for Meaningful Transparency

Our research demonstrates a need for brands to take new approaches to share transparent information. We found that for transparency to make a meaningful difference for consumers, it must meet the following criteria:

"Instead of just saying, 'Look what we're doing,' they should answer, for example, 'Why are you doing it?'"

CONSUMER, LONDON
AGE 18-34

"Who are the people doing the scoring? That's the most important thing to know."

CONSUMER, NEW YORK
AGE 35-55

- **Elicit Trust.** Information must be believed, both rationally and emotionally
- **Empower.** Communication should help to inform choices without overcomplicating decisions
- **Be Focused.** Communication should be simplified to show the information that matters in a clear way
- **Be Visible.** Information should be easy to access and prominent

To achieve the above, brands need to consider what is communicated, and how and where it is communicated.



What Information to Share

The research found three key pillars of information that will build trust in apparel brands' sustainability communications:



1. Motivation (why are you doing this?)

Consumers voice a strong desire to understand why brands are taking action and sharing this information, and how this connects to the values of the organization. Without understanding the reasons behind sustainability actions or communications, some consumers become more skeptical and suspect efforts are marketing exaggerations.

Implication for brands: Framing your transparency with a clear sense of the purpose behind it will ensure consumers know you are serious and authentic in motivation.

2. Plan and action (what are you doing?)

Consumers want to know what brands are doing to make their business and products more sustainable. There is strong appetite for brands to share their vision and goals in specific sustainability areas along with how and when they hope to achieve these. This statement of intent needs to be inspiring but also direct and to-the-point in order to be believed. Consumers are clear that they don't expect brands to have achieved everything yet, but they do need demonstrations of concrete steps for how brands will get there.

Consumers also want reassurance that brands are being honest. One of the most powerful ways to demonstrate this is to share areas in which have been negatively assessed and which areas need improvement. Learning directly from brands about where they are falling short and what they are doing about it is one of the most motivating pieces of information for many consumers.

“Transparency helps promote sustainability and it can really change this industry. This Higg Index is a great tool to identify sustainability performance. By using it, we can tell where we were, what we are doing, and how we are improving.”

**ANDY ZHONG, MARKETING DIRECTOR
PROSPERITY TEXTILE**

Implication for brands: Communicate the 3 to 4 big goals that define your direction, with clear deadlines for when you will achieve them. Highlight a small number of specific initiatives to deliver your big goals, presented in simple bullet points or as “stories” of case studies to engage people in more depth.

Be brave and consider including case studies that focus on the areas where you are weakest and your plans to improve.

3. Independent evaluation or verification (prove what you are doing)

Low trust in apparel brands to be truly transparent means consumers are often looking for external evidence to back up the information shared.

We found strong appetite in all markets for recognizable labels and guides that they can trust because they are “neutral,” “independent,” and apply the same approach and criteria to all groups assessed. Most consumers currently feel there is a gap in the industry for such tools.

There is also demand for the same tools and guides to be widely used in the industry – to make life easier for consumers rather than add to complexity when making purchase choices.

Implication for brands: There is an opportunity for the industry to help consumers through collaboration and demonstrate collective action by creating a common language that is easily recognized and understood.



Scope of Information to Share

One of our key research objectives was to understand the scope of sustainability information that consumers are interested in, whether about the product, the brand as a whole, or facilities in the value chain. We found interest at all three of these levels – each with its own unique role in helping consumers understand the choices they make.

“We believe that transparency can drive positive change in the industry. We expect transparency to be implemented more holistically to reflect the performance of supply chain as well as brands on multiple sustainability metrics”

ABHISHEK BANSAL
HEAD OF SUSTAINABILITY
ARVIND LIMITED

Transparency at the brand level

When it comes to apparel shopping, most consumers don't just seek products, they seek brands they connect to personally and that they feel represent them. Reflecting this, most people in our research were interested in hearing about what the whole brand or company is doing regarding sustainability; they were not just seeking transparency at an individual product level.

This more complete view is particularly important to consumers with concerns about the scale and honesty of change. They want reassurance that brands aren't “cherry-picking” what to be “transparent” about.

Therefore, the information shared needs to represent a holistic assessment of what the whole organization is doing in terms of both social and environmental responsibility.

Transparency at the product level

We also found considerable appetite for more transparency about the social and environmental impacts of products. Many consumers like the idea of being empowered at the point of purchase (online and in-store) with details about what they are buying. For some, this is the most tangible and believable way for companies to be transparent.

At this level there is particular interest in information on materials and manufacture – especially the workers who made the product.

This interest in product-level sustainability is not universal, however, as some people feel that seeing this information on all products would be too much and potentially overwhelming.

Transparency at the manufacturer level

Producer-level information is also valued, but this information is most powerful when shared as a next level of depth, as evidence of product and brand transparency, rather than as a stand-alone part of communications (e.g. supplier lists).

Showing clearly where a product is made and key information on the standards of the factory reinforces trust and perceptions of accuracy.

“We found the transparency pilot a learning opportunity. As a Design to Delivery apparel solutions provider we are keen to understand our role in turning visibility into value not only for us but for the customers we serve”

SHARIKA SENANAYAKE,
DIRECTOR ENVIRONMENTAL
SUSTAINABILITY,
—
MAS HOLDINGS



How to Communicate

Consumers want brands to apply the same high standards to transparency as they do to other consumer-facing communications. This means ensuring communications about sustainability performance should be high-quality, stylish, attention-grabbing, and designed with customers in mind.



There is an appetite for a joint mix of direct “factual” presentation of information supported by inspiring stories that spark deeper engagement and desire to know more (especially via video or more interactive means). This blend of engaging people rationally and emotionally will reinforce belief in both the actions and the values driving them.

Engage me rationally – short, sharp facts and clear commitments

- Brevity in presentation is highly valued. Avoid long copy that communicates in general terms or is indirect in expression – consumers ask for hard facts and clear statements of plans or action, in bullets, or short text.
- When sharing data, express it in a form that is understandable to non-experts. For example, in categories like high/medium/low, color coding (green, yellow, red), or simple scales (e.g. on a five-point scale) rather than showing actual metrics (e.g. units of CO₂), which most people don’t understand or want to read.
- Avoid technical terms – which might be more accurate but have the potential to alienate people. The word “sustainable” has limited appeal and is confusing to many.
- Use simple visual charts (e.g. trends in performance over time) which generate interest and show progress.
- If using terms like “fair pay” or “good working conditions” the brand should back them up with simple explanations.

Engage me emotionally and rationally - stories that tie together why, what, and how

Emotions focus our attention and fix things in our memory. To have the most impact, tell stories that communicate your purpose and intent. Then support them with facts about your organization's real-world behavior. Demonstrating continuity in the story will reinforce trust.



- **State your “WHY”:** Consumers want to know what values you hold, so they can see whether you live up to them.
- **Show the people and places:** The best stories are visual and about real people, places, and things.
- **Focus on action:** Stories are about action, not theory. This demonstrates the brand's character and intentions in what you choose to do.
- **Use video and invite people to learn more:** Short videos are more easily digested and engaging than text and were highly valued by participants in our research. Consumers are also keen to learn more once your story is clear to them, so this is an opportunity to invite them to engage further.

Where to be transparent

Consumers express the need for transparency to not be “hidden-away” in “corporate” parts of the website, but to become integrated within the consumer/brand experience and be more visible. This shows that the brand considers this information important and wants customers to see it.

Where to share:

- **Online/mobile:** Easily visible on product pages (alongside product images, high up on page) and easy-to-find parts of the brand website and social media channels.

- **Product hangtags:** Hangtags cannot be avoided when you are buying the product. Some consumers suggest grouping together products that communicate a score; consumers will be drawn to this area of the store.
- **Signs or videos in-store:** In-store visibility is seen as a signal that the brand considers this important and wants consumers to find out more. Share in places where consumers linger (e.g. outside changing rooms).
- **Product labels:** Consumers will see these once they get home and more frequently as they wear and wash their clothing. Information on labels has the potential to become established in people’s minds and provoke curiosity.
- **QR codes or similar methods:** These can be used as an easy way to link to more information. Even if consumers do not use the QR code itself, the suggestion that there is more information behind the scenes is reassuring for many.



Of less interest:

- **“Corporate” parts of the website:** Webpages with information about factories or a company’s sustainability performance have limited appeal to consumers. For some, the use of these channels is seen as “hiding” information from consumers by making it inaccessible.



SECTION 04

The Role of the Sustainable Apparel Coalition and the Higg Index

For the SAC, this research reinforces the power of collaboration across the industry in developing a harmonized approach to assess sustainability and one common language to communicate. Consumers want the industry to work together to make it easier for them, not to overload them with complexity and different expressions of sustainability. Consumer reaction to the Higg Index was very positive, supporting the key principles underpinning it. The role of the Higg Index in consumer communications going forward has potential value in several ways:

- **Standardized and recognizable.** One of the key aspects that makes the Higg interesting to consumers is that all brands using it follow the same process, use the same criteria, and share the same information. Consumers believed the high-level communication of the Higg should be unified in format to reinforce this and make it easily recognizable for them. This can be accompanied by an individual brand tailoring the communication of its story around why it's taking part and action associated as supporting or linked content.
- **Simple, aggregated assessment.** The requests from consumers for a simple aggregate assessment to reflect performance reinforces the current proposed 5-point scale of consumer-facing Higg Index scores.
- **Broad coverage.** Consumers were very keen to see the scores widely adopted across brands and to have access to comparisons. Broad reach was seen to increase the value of scores for consumers, demonstrate the industry as a whole is committed to change, and help drive standards forwards.
- **Neutral and independently verified.** Some consumers had strong concerns that if apparel brands were working independently to develop the Higg Index, they would not develop a neutral methodology. Consumers are anxious to know that there is a third-party "governing body" controlling the process, that non-corporate actors are involved and that information is verified independently. Demonstrating and communicating the neutrality and independence of the assessments are critical to building trust in the Higg Index.
- **Full (not selective) transparency.** The holistic nature of the Higg assessment stood out to consumers, and they are keen to ensure that brands are not able to focus only on positive results.

The SAC is applying learnings from this consumer study in its transparency strategy and in the development of communication tools for the Higg customers to share Higg Index performance in a meaningful way with the broader public.

To drive industry transparency and build upon the positive consumer sentiment towards the Higg Index, the SAC is currently developing a website dedicated to Higg Index transparency. This centralized public platform will enable SAC members and Higg Index customers to transparently communicate about their sustainability journeys.

Consumers will also be invited to participate in implementing the Higg Index to learn about their own environmental impacts by submitting how they wear and care for their clothing.

Sustainable Apparel Coalition

The Sustainable Apparel Coalition (SAC) is the apparel, footwear, and textile industry's leading alliance for sustainable production. Our vision is an industry that produces no unnecessary environmental harm and has a positive impact on the people and communities associated with its activities. The SAC develops the Higg Index, a standardized suite of tools for all industry participants that measures environmental and social labor impacts across the value chain. With this data, the industry can address inefficiencies, improve sustainability performance, and achieve the environmental and social transparency consumers are demanding. By joining forces in a Coalition, we can address the urgent, systemic challenges that are impossible to change alone.

To discuss these findings in more detail please contact:

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GlobeScan

GlobeScan is an insights and strategy consultancy that helps companies, NGOs and governmental organizations create enduring value for themselves and for society. Offering a suite of specialist research and advisory services, we partner with our clients to meet strategic objectives across reputation, sustainability and purpose. Our purpose is to build trusted leadership to create a better future.

FIND OUT MORE

Get Involved

Find out more about joining the SAC and using the Higg Index on www.apparelcoalition.org/contact-us

Sign up for newsletters on SAC's Transparency projects with an e-mail to higgtransparency@apparelcoalition.org



Collaborators

Thanks to the following organizations for their valuable contribution to supporting this research and sharing their time and expertise to inform the insights.

