

## 4 RESEARCH FINDINGS

### 4.1 Results of the online survey

The first three questions of the online survey are socio-demographic questions in order to ensure that only people of the defined statistical population participate.

Question four, the first content-related, open-ended question after the socio-demographic ones, asks the participants about their understanding of the CR of companies in the clothing industry. More than one third of the survey participants, 33 per cent, could not answer the question. This is why the same question was asked once again with response options in order to help the participants by suggesting answers. The five most frequently given answers to the open-ended question and the five most frequently given answers to the closed-ended question correspond with each other:

Question 4/5: What does CR of companies in the clothing industry mean to you?					
Open-ended question 4, Multiple answers possible			Closed-ended question 5, Multiple answers possible		
Question answered: 339 women (67%) Question not answered: 165 women (33%)			Question answered: 504 women (100%)		
Response category	Mentions	Share*	Share*	Mentions	Response category
<i>Fair wages (no cheap labour, social benefits)</i>	142	42%	89%	450	<i>No child labour</i>
<i>Good working conditions (fair treatment, appreciation, work safety)</i>	117	35%	88%	441	<i>Fair wages</i>
<i>Environmentally friendly production, sustainability</i>	102	30%	87%	438	<i>Good working conditions</i>
<i>No child labour</i>	83	24%	78%	391	<i>Environmentally friendly production (dyeing, bleaching, processing, etc.)</i>
<i>No chemicals / toxins in clothes</i>	37	11%	75%	377	<i>Non-toxic clothes</i>

*\*Share of women who answered the question, i.e. named at least one reason.*

*Table 6: Results of question 4/5. Source: Own illustration.*

The three most often mentioned answers to question four, the open-ended version, are fair wages, good working conditions and environmentally friendly, sustainable production. In the closed-ended question five, these three aspects ranked second, third and fourth place. The aspect 'No child labour', the most frequently selected answer to the closed-ended question five, is in fourth position in the open-ended version. The fifth most often mentioned answer to open-ended question four is 'No chemicals/toxins in clothes', which is also the fifth most frequently mentioned answer to question five. In summary, for the German consumer fair payment, good working conditions, no child labour and environmentally friendly production as well as non-toxic substances are the most important criteria for CR with regard to fashion labels.

Question six asks about the importance of the CR of companies when purchasing clothing. 86 per cent or 432 women answer very important or important, whereas 14 per cent or 72 women answer rather unimportant or unimportant. With regard to the age groups, there is no major departure within each answer option. That means 20 per cent of the 15-19-year-old, 22 per cent of the 20-29-year-old, 22 per cent of the 30-39-year-old, and 26 per cent of the 40-49-year-old women find CR very important. 65 per cent of the 15-19-year-old, 65 per cent of the 20-29-year-old, 62 per cent of the 30-39-year-old, and 60 per cent of the 40-49-year-old find CR important. 13 per cent of the 15-19-year-old, 12 per cent of the 20-29-year-old, 14 per cent of the 30-39-year-old, and 13 per cent of the 40-49-year-old find CR rather unimportant. Finally, two per cent of the 15-19-year-old, 1 per cent of the 20-29-year-old, 1 per cent of the 30-39-year-old, and 2 per cent of the 40-49-year-old find CR unimportant.

Question 6, closed-ended: How important is the CR of companies in the clothing industry to you when purchasing clothing?										
	Total		Age 15-19		Age 20-29		Age 30-39		Age 40-49	
	Mentions	Share	Mentions	Share	Mentions	Share	Mentions	Share	Mentions	Share
<i>Very important</i>	116	23%	9	20%	31	22%	31	22%	45	26%
<i>Important</i>	316	63%	30	65%	92	65%	88	62%	106	60%
<i>Rather unimportant</i>	65	13%	6	13%	17	12%	20	14%	22	13%
<i>Unimportant</i>	7	1%	1	2%	1	1%	2	1%	3	2%
<i>Sum</i>	504	100%	46	100%	141	100%	141	100%	176	100%

Table 7: Results of question 6. Source: Own illustration.

The next question, question seven, asks about three fashion labels, which are known as being active with regard to CR. Initially, the question is formulated as an open-ended one. 69 per cent of the statistical population, i.e. 347 women, did not answer the question. 157 women or 30 per cent answered the question. Three answers are invalid, because the answers did not make sense, e.g. '...' or 'I do not know'.

Compared to the closed-ended version of the same question, question eight, more than one third of the statistical population, 194 women or 38 per cent, did not make any entry, which is still more than one third of the statistical population. The 15 most frequently picked fashion labels from a given list are:

Question 7/8: Which three fashion labels do you know as being active with regard to CR?					
Open-ended question 7			Closed-ended question 8		
Question answered: 157 women (31%) Question not answered: 347 women (69%)			Question answered: 310 (62%) Question not answered: 194 women (38%)		
Brand	Mentions	Share*	Share*	Mentions	Brand
<i>H&amp;M</i>	29	18%	26%	80	<i>hessnatur</i>
<i>Esprit</i>	26	17%	20%	62	<i>C&amp;A</i>
<i>C&amp;A</i>	19	12%	19%	60	<i>H&amp;M</i>
<i>Trigema</i>	13	8%	19%	58	<i>Tchibo</i>
<i>S.Oliver</i>	13	8%	18%	56	<i>Esprit</i>
<i>Armed Angels</i>	12	8%	16%	49	<i>Trigema</i>
<i>Adidas</i>	10	6%	14%	43	<i>Adidas</i>
<i>hessnatur</i>	10	6%	11%	35	<i>Lidl</i>
<i>Nike</i>	9	6%	10%	32	<i>Benetton</i>
<i>Puma</i>	7	4%	10%	30	<i>S. Oliver</i>
<i>Tom Tailor</i>	6	4%	9%	29	<i>Vaude</i>
<i>Tchibo</i>	4	3%	9%	27	<i>Nike</i>
<i>Lidl</i>	4	3%	8%	25	<i>Armed Angels</i>
<i>Zara</i>	4	3%	6%	20	<i>Puma</i>
<i>Kik / fairtrade / Desigual Bio / Vero Moda</i>	3	2%	6%	20	<i>Aldi</i>

\*Share of women who answered the question, i.e. named at least one brand.

Table 8: Results of question 7/8. Source: Own illustration.

All of the five most often named fashion labels from question seven, the open-ended question, are also among the ten most often named fashion labels from question eight, the closed-ended version. The most often named fashion labels from question eight are placed sixth, seventh, eighth, ninth and tenth on the list from question seven of the 15 most frequently named fashion labels.

Two sustainable fashion labels, Armed Angels and hessnatur, are placed sixth and eighth in the answers to the open-ended question seven.

When considering the age groups in the closed-ended question eight, see the figure below listing the 15 most frequently cited brands, one can see that the frequency with which C&A is mentioned is very similar across all age groups. The fashion labels, for which mentions in both rankings do not vary more than three positions, are C&A, H&M, Esprit, Trigema, Adidas and Nike.

Question 8, closed-ended: Which three fashion labels do you know as being active with regard to CR?											
Brand	Rank		15-19 years		20-29 years		30-39 years		40-49 years		Total Nom.
	Closed-ended	Open-ended	Mentions	Share*	Mentions	Share*	Mentions	Share*	Mentions	Share*	
<b>hessnatur</b>	1	8	4	11%	28	33%	24	30%	24	22%	80
<b>C&amp;A</b>	2	3	7	20%	18	21%	17	21%	20	19%	62
<b>H&amp;M</b>	3	1	7	20%	12	14%	17	21%	24	22%	60
<b>Tchibo</b>	4	13	7	20%	18	21%	10	12%	23	21%	58
<b>Esprit</b>	5	2	7	20%	13	15%	18	22%	18	17%	56
<b>Trigema</b>	6	4	4	11%	11	13%	15	19%	19	18%	49
<b>Adidas</b>	7	7	9	26%	7	8%	9	11%	18	17%	43
<b>Lidl</b>	8	14	3	9%	10	12%	9	11%	13	12%	35
<b>Benetton</b>	9	X	2	6%	10	12%	11	14%	9	8%	32
<b>S.Oliver</b>	10	5	6	17%	8	9%	5	6%	11	10%	30
<b>Vaude</b>	11	17	2	6%	10	12%	12	15%	5	5%	29
<b>Nike</b>	12	9	6	17%	7	8%	7	9%	7	6%	27
<b>Armed Angels</b>	13	6	2	6%	10	12%	11	14%	2	2%	25
<b>Puma</b>	14	10	3	9%	4	5%	4	5%	9	8%	20
<b>Aldi</b>	15	X	3	9%	6	7%	2	2%	9	8%	20

\*Share of women who answered the question, i.e. named at least one brand.

Table 9: Results of question 8 by age groups. Source: Own illustration.

Question nine is an open-ended question and asks why the previously named fashion labels are known as being committed to CR. The ten most often cited brands from question eight are evaluated, multiple answers are permitted. When summing up the named reasons across all ten fashion labels and ranking them afterwards, the top three reasons for knowing about the CR commitment are:

- 1) Sustainable/environmentally friendly production/offering sustainable products
- 2) Conveyed through advertising
- 3) Found out from the media (read/seen/heard)

Question 9, open-ended: How did you learn about the CR activities of the previously named fashion labels?		
	Mentions*	Share*
Sustainable / environmentally friendly production / offering sustainable products	92	18%
Conveyed through advertising	88	17%
Found out from media (read / seen / heard)	61	12%
Have good working conditions	32	6%
Word-of-mouth advertising (by family, friends, other contacts)	30	6%
Produced in Germany	28	6%
Provide good quality / good value-for-money ratio	28	6%
Products have eco seal or label	25	5%
No child labour	14	3%
Paying fair wages	14	3%
Support fair trade	8	2%
Recycle old clothes	6	1%
Are socially committed	5	1%
Protect animal rights	4	1%
Others	64	13%
Do not know / no reason	84	17%

\*Total mentions of this reason across all ten brands.

\*\*Share of the total mentions across all reasons and all ten brands.

Table 10: Results of question 9. Source: Own illustration.

The most often cited reason by 26 women with regard to the label hessnatur is 'Sustainable/environmentally friendly production/offering sustainable products', which with 18 votes is the top reason for C&A too, and for Tchibo with twelve mentions. The most often cited reason with 27 votes or 55 per cent for fashion label Trigema is 'produced in Germany' and the second most often named reason is 'pay fair wages' with ten votes. Eight women answered 'eco-labels' for C&A as well as six women for H&M.

Question ten is a closed-ended question and asks how the respondents learnt of the CR activities of the previously named fashion labels. The participants are able to select one or more channels from a predefined list. The mentions per channel are summed up and the share of the total amount of mentions is calculated. The three most frequently mentioned reasons for the perception of the label as being active in CR are:

- 1) The shop with 30 per cent of all mentioned channels, 216 mentions, or 15 times being among the three most often named ways.
- 2) The channel website with 24 per cent of all mentioned channels, 171 mentions, or twelve times being among the three most often named ways.
- 3) The channel TV with 23 per cent of all mentioned channels, 169 mentions and 13 times being among the three most often named channels.

Question 10, closed-ended: How did you learn about the CR activities of the previously named fashion labels?		
	Mentions*	Share*
Shop	216	30%
Website	171	24%
TV	169	23%
Family/Friends	150	21%
Newspaper/Magazine	140	19%
Social Media	125	17%
Outdoor advertising	71	10%
Others	51	7%
Direct mail advertising	50	7%
Flyer	35	5%
Radio	15	2%

\*Total mentions of this channel across all brands.

\*\*Share of the total mentions across all channels and brands.

Table 11: Results of question 10. Source: Own illustration.

The following mentions are striking:

C&A, with 33 votes and 53 per cent, has the most mentions of all labels for the top channel shop, followed by H&M with 28 votes or 47 per cent for the channelshop, and Tchibo with 27 votes or 47 per cent. hessnatur, the winner of closed-ended question eight, has 23 mentions or 29 per cent for the second-placed channel website. With regard to the third top channel TV, the label Trigema has by far the most votes with 33 or 67 per cent.

If one looks at the preferred channels of each age group, it is remarkable that the winning channel shop is ranked first in each of the four age groups, relatively balanced with 22, 18, 19 and 19 per cent respectively. The internet, with social media or website, is ranked second or third for the 15-19-year-old and 20-29-year-



old women. For the two older age groups, the relevance of online channels decreases. Instead, the channel TV is more important for them and is third for both groups. This entire spreadsheet is very complex and is included in the appendix.

Question eleven provides a Likert scale for the answer and asks about the importance of eco-labels when purchasing clothing. 44 per cent or 221 women answered very important or important, whereas 56 per cent or 283 women answered rather unimportant or unimportant.

<b>Question 11, closed-ended: How important are eco-labels for you when purchasing clothes?</b>		
	<b>Mentions</b>	<b>Share</b>
<i>Very important</i>	39	8%
<i>Important</i>	182	36%
<i>Rather unimportant</i>	236	47%
<i>Unimportant</i>	47	9%
<i>Sum</i>	504	100%

Table 12: Results of question 11.

Source: Own illustration.

Question twelve is an open-ended question and asks about known eco-labels for clothing, multiple answers are permitted. 388 women or 77 per cent said they did not know an eco-label for clothing, whereas 116 women knew one or more eco-labels. By far the most mentions, with 39 are for the label Fairtrade, which garnered 34 per cent of the votes. Oeko-Tex received far fewer with 13 votes or eleven per cent and in third place is Blauer Engel with nine mentions.

Question 12/13: Which eco-labels for clothing do you know?					
Open-ended question 12			Closed-ended question 13		
Question answered: 116 women (23%) Question not answered: 388 women (77%)			Question answered: 504 women (100%)		
Brand	Mentions	Share*	Share*	Mentions	Brand
<i>Fairtrade</i>	29	34%	80%	403	<i>Textiles Vertrauen nach Oeko-Tex Standard 100</i>
<i>Oeko-Tex</i>	13	11%	72%	363	<i>Blauer Engel</i>
<i>Blauer Engel</i>	9	8%	70%	354	<i>Fairtrade Certified Cotton</i>
<i>Bio</i>	9	8%	11%	55	<i>GOTS</i>
<i>Bio Baumwolle</i>	8	7%	7%	36	<i>Keine</i>
<i>Bio Cotton</i>	7	6%	6%	31	<i>Cradle to Cradle</i>
<i>Textiles Vertrauen</i>	7	6%	4%	19	<i>Internationaler Verband der Naturtextilwirtschaft</i>
<i>GOTS</i>	7	6%	1%	3	<i>Others</i>

\*Share of women answering the question, i.e. naming at least one eco-label.

Table 13: Results of question 12/13. Source: Own illustration.

The last question of the online survey is question 13, the same question as question twelve, but closed-ended. Multiple answers are also permitted. Textiles Vertrauen/Oeko-Tex Standard placed first with 403 votes or 80 per cent. Then comes Blauer Engel with 363 votes or 70 per cent, closely followed by Fairtrade Certified Cotton with 354 mentions or 70 per cent. The top three answers for both questions correspond, but in different order.

## 4.2 Results of the expert interviews

Question one asks the experts how important, in their opinion, CR for fashion labels is for the public. Three experts are of the opinion that the importance of CR is increasing. Two experts think that CR is important. One expert feels it is very