




FASHION SUSTAINABILITY REPORT

Dear readers,

The fashion industry is at a turning point in its history. Over the last few years, voices have arisen demanding more sustainable production, especially in the aftermath of the 2013 Rana Plaza collapse in Bangladesh that killed 1134 people and shed light on the poor working conditions in garment factories. Following this tragedy, the #FashionRevolution movement was created. Each year in April, it encourages brands to be more transparent about their production chain by using the hashtag #WhoMadeMyClothes.



After the social challenge, come the environmental and ethical questions for brands. Indeed, demand is constantly increasing, and so is production. According to the Pulse Of The Fashion Industry's 2019 report, clothing production is expected to hit 102 million tons by 2030. That's a whopping 64.5% increase from 62 million tons in 2017. The volume of production has already doubled in the past 15 years. We buy more clothes than ever. *But are consumers voting with their dollars towards more sustainable purchases?*

It is certain that consumers are increasingly values-driven when buying clothes. 38% of consumers report switching to a preferred brand based on its environmental or social practices, according to the report. However, we were curious to analyze whether this societal trend is being adopted by the majority of consumers, or just a small niche.

We wish you a pleasant reading!

Best,
The Heuritech Team

HEURITECH ANALYSIS IN FIGURES

25
millions posts



400
hashtags

over the past 3 years on Instagram from consumers and influencers in the US and in Europe



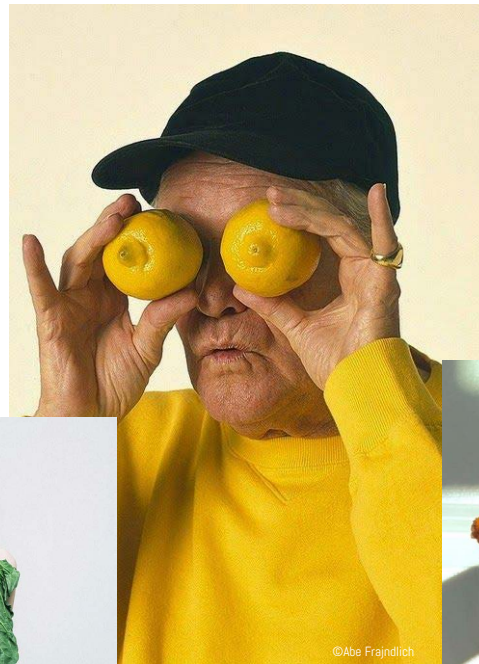
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WHAT IS SUSTAINABLE FASHION?

TOP THEMES

We defined 8 categories related to sustainable fashion:

Environment

Everything that is related to the environment, not only in the fashion industry

Fashion revolution

A global movement calling for greater transparency in the fashion industry

Handmade

Products made by hand or involving a manual process

Organic materials

Certified organic textiles grown according to specific agricultural standards

Sustainable Fashion

A process to make the fashion lifecycle more sustainable

Vegan

When the manufacturing of a product does not use animal products or by products

Vintage

Reusing old clothes through vintage or second-hand

Recycle

Products that are given a second life through recycling or upcycling

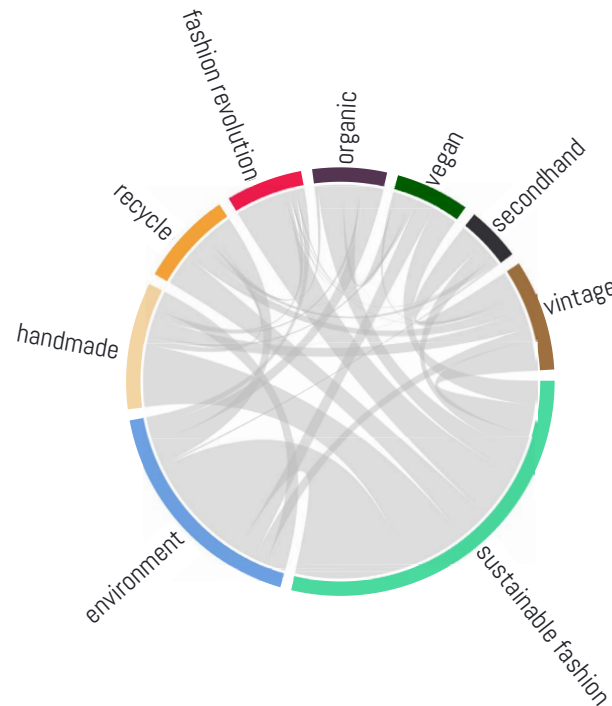
SOME HASHTAGS FOUND IN POSTS...

#sustainability #sustainabilitymatters #sustainabilityinstyle #sustainabilityblogger #sustainabilityeducation #sustainabilityissexy
#environmentalsustainability #sustainabilitychallenge #sustainabilitygoals #fashionsustainability #selfsustainability
#sustainabilitysaturday #sustainabilityweek #sustainabilityfashion #sustainabilitycentre #sustainabilityiscool #sustainability
#sustainable #ecofriendly #zerowaste #sustainableliving #environment #nature #eco #climatechange #gogreen #ecofriendly
#sustainabilitymatters #sustainabilityblogger #sustainabilityeducation #sustainabilityissexy #environmentalsustainability
#sustainabilitychallenge #foodsustainability #sustainabilitygoals #selfsustainability #sustainabilityweek #sustainabilitycentre
#sustainabilityiscool #fashionrevolution #fashionrevolutionweek #fashionrevolution #fashionrevolutionweek
#fashionrevolutionday #fashionrevolutionweek2019 #fashionrevolutionweek2018 #fashionrevolutionportugal
#fashionrevolution2018 #fashionrevolution2019 #fashionrevolutiongermany #fashionrevolutionspain #fashionrevolutionhungary
#fashionrevolutionweek2017 #fashionrevolutionitalia #fashionrevolutionswitzerland #fashionrevolutionnorway
#fashionrevolutionfrance #fashionrevolutionaustria #revolutionfashion #fashionrevolution2017 #whomademyclothes
#handmade #handcrafted #handloom #handwoven #handmade #handmade furniture #handmade crafts
#handmade cosmetics #handmade brooch #handmade type #handmade crochet #handmade jewelry #handmade jewelry
#handmade uk #handmade home #handmade art #handmade craft #handmade au #handmade bag #handmade leather
#handmade is best #brooch handmade #leather handmade #handmade shoes #handmade bags #handmade bracelets
handmade bracelets #handmade bags #handmade shoes #cottonorganic #organic cotton tee #organic cottons #organic cotton scarf
#organic cotton for kids #organic #organic cotton #sustainabilityin fashion #sustainable fashion #slow fashion #slow fashion blogger
#slow fashion style #slow fashion october #slow fashion movement #slow fashion summer #slow fashion challenge
#slow fashion passion #slow fashion world #slow fashion next #slow fashion for kids #slow fashion representation matters
#slow fashion store #slow fashion spain #slow fashion in spo #slow fashion brand #slow fashion community #slow fashion ootd
#slow fashion blog #slow fashion october 2018 #slow fashion utmaningen #slow fashion revolution #slow fashion design
#slow fashion shoes #slow fashion designer #slow fashion chile #slow fashionista #slow fashion berlin #slow fashion baby
#slow fashion bloggers #slow fashion is the new fashion #slow fashion basement #slow fashion label #slow fashion #ethical fashion
#ecofashion #conscious fashion #fair fashion #slow fashion #slow fashion blogger #slow fashion style #slow fashion october
#slow fashion movement #slow fashion summer #slow fashion challenge #slow fashion passion #slow fashion world
#slow fashion next #slow fashion for kids #slow fashion representation matters #slow fashion store #slow fashion spain
#slow fashion in spo #slow fashion brand #slow fashion community #slow fashion ootd #slow fashion blog #slow fashion utmaningen
#slow fashion revolution #slow fashion design #slow fashion shoes #slow fashion design #slow fashionista #slow fashion berlin
#slow fashion baby #slow fashion bloggers #slow fashion is the new fashion #slow fashion basement #slow fashion label
#sustainabilityin style #sustainabilityin fashion #fashion sustainability #sustainability fashion #ethically made #vegan fashion
#vegan fashion blogger #vegan fashion blog #vegan fashionista #vegan fashion week #vegan #vegan leather jackets
#vegan leather earrings #vegan leather handbags #vegan leather backpack #vegan leather skirt #vintage #second hand #second hand
#second hand first #second hand shop #second hand bag #second hand bags #second hand clothes #second hand shoes
#second hands #second hand style #second hand fashion #second hand books #second hand store #second hand indo
#second hand clothing #second hand stuff #second hand furniture #second hand market #second hand shopping #buy second hand
#second hand brand name #second hand luxury #second hand hounds #second hand book #second hand finds #second hand vintage
#upcycling #upcycling fashion #upcycling art #upcycling project #upcycling ideas #upcycling furniture #upcycling design
#upcycling clothes #true fruits upcycling #upcycling interiors #upcycling bag #upcycling artist #upcycling jewelry #upcycling denim
#upcycling jewellery #upcycling workshop #upcycling clothing #recycle #reuse #upcycling #upcycling #upcycling fashion
#upcycling art #upcycling project #upcycling ideas #upcycling furniture #upcycling design #upcycling clothes #true fruits upcycling
#upcycling interiors #upcycling bag #upcycling artist #upcycling jewelry #upcycling denim #upcycling jewellery #upcycling workshop
#upcycling clothing

THE SOCIO-ECOLOGICAL SYSTEM OF FASHION

Co-occurrence between hashtags from the 8 categories on Instagram posts

Methodology: We looked at the content of posts with sustainability-related hashtags in them and measured the co-occurrences between their hashtags.



Hashtags involving sustainability largely overlap and display interesting synergies.

To comment a few, we note that sustainable fashion is animated by the return to the handmade. It appears that it is also nourished by the fashion revolution movement, which we will dive into later in this report. Furthermore, we can't ignore the fact that sustainable fashion begins with choosing more responsible materials, organic or vegan ones.

Overall, these topics overlap and translate into a trending dynamic of a more sustainable way of living that goes all the way up to how we think about fashion.



@amourvert



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According to the 2018 State of Fashion report by Business of Fashion and McKinsey, 66% of millennials are willing to spend more on brands that are sustainable. **Is sustainability the new growth driver?** For brands, the challenge is to rethink their business model and their supply chain to integrate sustainability at their core: from how a product is made, with solutions such as 3D printing and more local factories, to the sourcing of materials with innovative fabrics such as Orange Fiber made from citrus juice, to increased traceability and more transparency through blockchain and finally, sales and stock forecasting to avoid overstock. With this study, our hope was to offer insight into what consumers and influencers are talking about on Instagram to encourage the transition towards more sustainable fashion practices as well as reaffirm brand positioning.



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TOP HASHTAGS ASSOCIATED WITH FASHION

Methodology: We looked at the content of posts that had '#fashion' in them and measured the co-occurrences with each sustainable hashtag. The goal here is to bring out the sustainable intentions that are directly linked to fashion in the US and in Europe.

Note: the hashtags in gold are similar in the US and in Europe, the hashtags in black are exclusive to these continents.



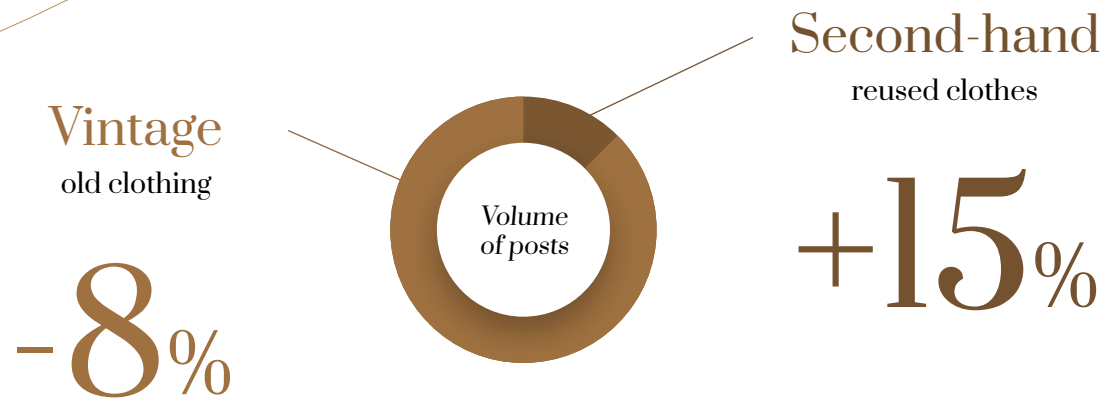
Overall, the most frequent co-occurrences are similar, letting us draw the conclusion that the topics of slow, sustainable and ethical fashion are trending in both Europe and US.

In the US, the top 9 hashtags contain broader hashtags related to the environment, demonstrating a growing commitment towards the planet when it comes to fashion as well. The US is adopting the recycling trend with brands like Poshmark and thredUP allowing consumers to resell their clothes online. The opportunity also exists for people to purchase a box that can be filled with clothing and shipped to organizations such as Terracycle Fabrics and Clothing Zero Waste Box.

Europe is embracing the vegan trend more notably than in the US. The use of the hashtag #vegan highlights the growing concerns relative to the production of leather. Many European brands such as VEJA have been working for years to develop a leather-free shoe. The brand launched its Campo sneaker in January 2019, the first 100% vegan shoe.

VINTAGE vs SECOND-HAND EVOLUTION SINCE THE BEGINNING OF 2019

The #vintage has decreased by 8% while the #secondhand has increased by 15% in Europe and in the US on Instagram since January 2019

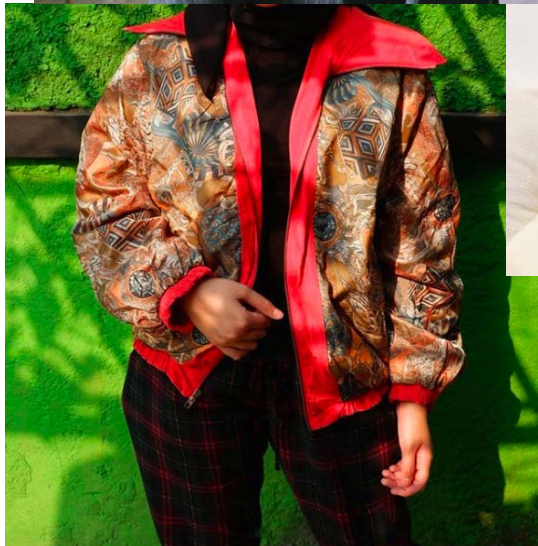


Even though vintage remains one of the major topics worldwide, it is not exploding like the other movements directly linked to sustainability. The trade-off between vintage and this new way of addressing fashion has even made it a declining trend since the beginning of 2019.

While vintage has always been around, it is interesting to notice the recent rise of the second-hand trend. Second-hand appears to be a more activist trend since it is directly correlated with fighting fast fashion, while vintage appears to be more of a lifestyle. Second-hand generates a virtuous cycle, a real, new way of consuming better by buying used clothes to reuse them.

Still, vintage remains very strong (6 times more present in posts than second-hand) and remains part of the sustainability movement as it can be a good reason to go second-hand.

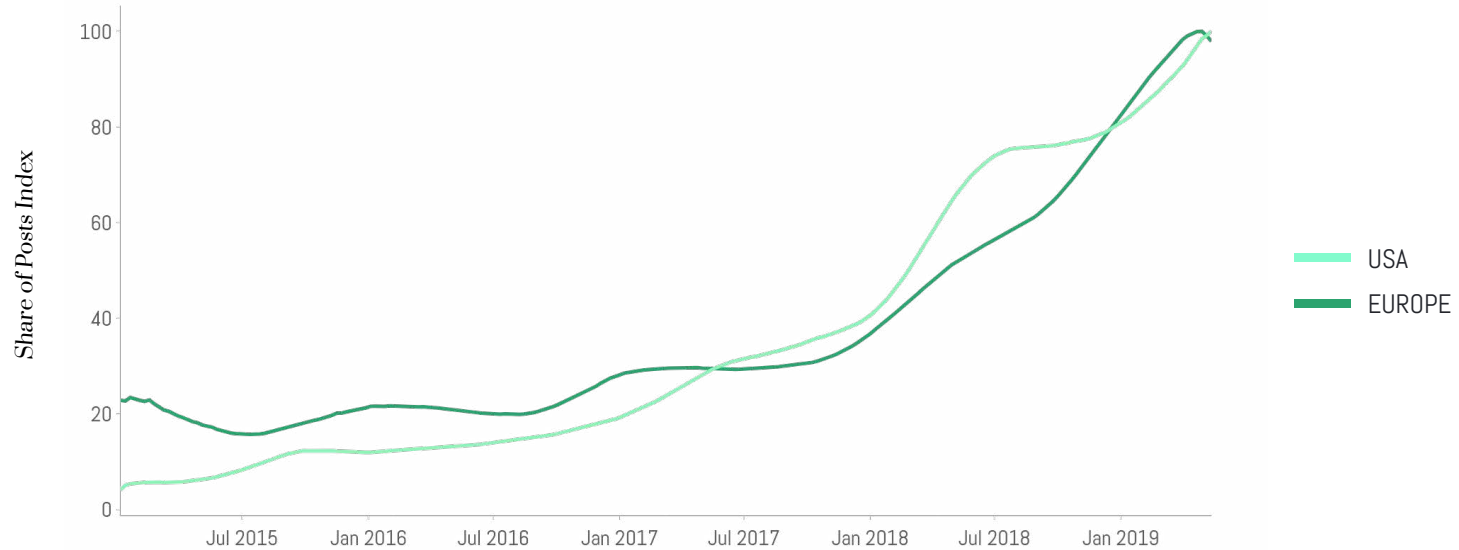
Second-hand



Vintage

SUSTAINABLE FASHION A BOOMING TOPIC WORLDWIDE

The evolution of the hashtag [#sustainablefashion](#) over time on Instagram



[#sustainablefashion](#)
x5 within **3** years

One of the most important hashtags of this study is [#sustainablefashion](#). It is not surprising, therefore, that we wanted to look at how it has evolved over time.

This hashtag started booming in 2018. In the US, the breakthrough happened in March 2018, most likely echoing the release of the Sustainable Fashion Report published by the United Nations. Within six months, between January and June, the hashtag's popularity grew by 60%. Europe has closely followed this strong trend, reinforcing the belief that sustainable fashion will keep on transforming our way of creating and consuming. The hashtag has grown by x6 in the US versus x4 in Europe since 2015.

INFLUENCERS CARE ABOUT...



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Most used hashtags among influencers (US and Europe)

#vintage #vegan #organic #handmade #sustainable
#climatechange #reuse #sustainability #secondhand

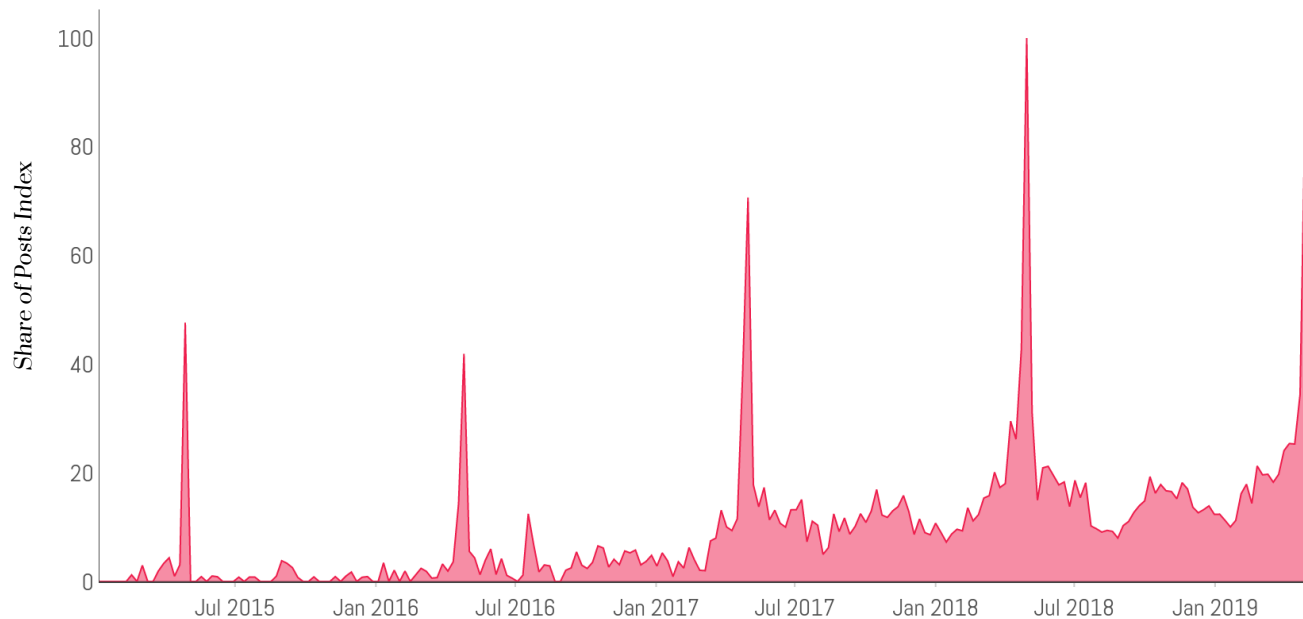
Influencers from the US and Europe are increasingly showing their commitment towards a more sustainable vision of fashion. Their engagement reflects consumer concerns, with an emphasis on vintage:

The hashtag #vintage is 4 times more talked about than the other hashtags.

Moreover, the presence of the #climatechange shows that the influencers are increasingly willing to be seen as activists and to build environmental awareness among their community of followers.

THE FASHION REVOLUTION NOW HAPPENS ALL YEAR LONG

The evolution of the hashtag *#fashionrevolution* on Instagram

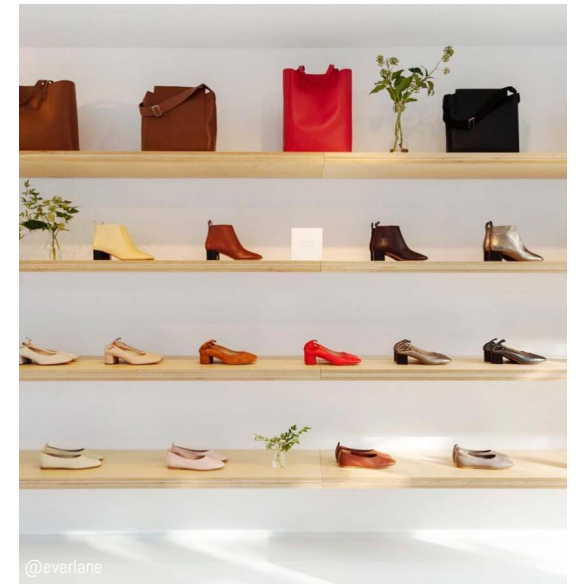


"Who made my clothes?" That is the question the Fashion Revolution movement is encouraging every consumer to ask when buying a new item and every brand to be mindful of throughout the process when creating their products.

The movement started after the Rana Plaza collapse on April 24th, 2013, which became the Fashion Revolution day. It was founded by Carry Somers and Orsola de Castro, two fashion designers in the UK.

It has evolved into a global movement present in 100 countries, claiming greater transparency in the supply chain, most notably with the campaign #whomademyclothes, encouraging brands to post pictures of their garment workers.

As can be observed from the evolution of the related hashtags on Instagram, the Fashion Revolution is no longer solely relevant in April but is increasingly becoming a day-to-day topic, clearly showing the awareness of this issue.



ENGAGED BRANDS

BRANDS MOST ASSOCIATED WITH SUSTAINABLE FASHION

Brands mentioned with hashtags related to each sustainable theme

Vintage

Ralph Lauren
Levi's
Adidas
Zara
Chanel
Nike
Gucci
Burberry

Sustainable fashion

Everlane
Veja
Levi's
Reformation
Vinted
Asos
Zara
Stella Mc Cartney

Environment

Nike
Zara
Adidas
Patagonia
The North Face
H&M
Chanel
Ray Ban

Emerging direct-to-consumer brands such as Everlane, Veja, Reformation and Vinted, are making their way into the top brands most associated with sustainable fashion. These brands have sustainability at the core of their DNA and engagement.

When looking at vintage, Ralph Lauren occupies a big spot, with twice as much buzz than Levi's, which has its own vintage line in its famous 501's. One can argue that the brands featured in the vintage ranking are making their way up because of resellers creating buzz on Instagram in order to sell "vintage" products from these brands.

In the environment ranking, Patagonia and The North Face are of course represented, while Zara and H&M are making their way in with their eco-conscious initiatives over the last few years.

Finally, two interesting facts to note: Levi's is the number 1 brand associated with the [#recycle](#) and Reformation with the [#fashionrevolution](#).




To be continued

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This is the first part of our Sustainability Report covering hashtags on Instagram to better understand consumer behaviors. For the second part of the report, Heuritech will analyze image content on Instagram using our image recognition technology. Stay tuned !

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