

Climbing Trees.

Quickfire

# The Green Fashion

SEARCH REPORT





## **Welcome to the Green Fashion Report, an in-depth look at the trends of sustainable fashion and how the increase in environmentally-friendly alternatives is affecting customer behaviour.**

Using search data, we have uncovered how customers in the UK have adapted to the growing green fashion market and what the impact of the last two years has had on the sector. The findings pose some questions for the sector, especially around how and who it markets itself to.

**The ethical fashion market is predicted to hit more than £8billion by 2025**, as environmental awareness continues to increase – but our findings suggest that more work is needed to convince consumers, particularly men, of the benefits of switching to greener products.



Shopify's Future of Commerce Report 2021 indicated that 75 percent of consumers would be willing to pay more for environmentally-friendly products – but actual behaviour may be different to responses received from surveys.

While searches centred around women's fashion are on the increase, the picture is quite different for men's alternatives and it poses the question: Is enough being done to promote green fashion, and particularly to men?

Run a search for 'environmentally friendly fashion brands uk' and the results on page one reveal the challenge. The vast majority are female-focused, with articles from Elle, Glamour, Yours and Harpers Bazaar all aimed at women. Even the result for an article on the website of national newspaper, The Independent, is titled 'The sustainable clothing brands for women that you should bookmark now'.

Traditionally, the two sexes engage with fashion quite differently. Experts point to the fact that women look to trends and influences, and their wardrobes change more frequently as a result; men, on the other hand, tend to keep clothes for longer and gravitate to what they're comfortable with.

This may be one reason why searches for men's green fashion items have flatlined – even decreased in some cases – while women's items are on the rise. Perhaps there is simply a bigger opportunity for change in the women's fashion market.

This highlights a challenge for the men's fashion industry and means that brands may need to work harder or be more creative with their targeting and messaging. What needs to be done to encourage men to change their buying habits?



The background is a collage of various textures. On the left, there are two stalks of dried, feathery grasses. To their right, a vertical strip of wood is visible. Further right, there are several pieces of fabric hanging, including a lace-trimmed fabric, a light-colored knit, a dark brown knit, and a light-colored fur or shaggy knit. The overall color palette is muted and earthy, with a semi-transparent dark overlay across the entire image.

# Our Findings



Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
second hand clothes	6,600	22%	50%	100	£0.31	£1.86
second hand clothing	6,600	22%	50%	100	£0.31	£1.86
preloved clothes	1,600	0%	50%	100	£0.22	£2.28
second hand designer clothes	1,600	0%	0%	100	£0.24	£2.32
second hand vintage clothing	880	48%	48%	100	£0.24	£1.73
2nd hand clothes	720	22%	49%	100	£0.22	£1.86
second hand dresses	590	49%	83%	100	£0.37	£2.32
mens second hand clothes	320	50%	0%	100	£0.24	£1.88
second hand fashion	260	84%	181%	100	£0.28	£2.33
pre owned clothes	260	0%	0%	72	£0.31	£2.81
pre loved clothing uk	210	24%	24%	100	£0.17	£1.65
preloved childrens clothes	210	-56%	136%	100	£0.24	£1.78
mens second hand designer clothes	210	24%	24%	100	£0.30	£2.42
womens second hand clothes	210	-81%	-35%	99	£0.31	£2.18
second hand womens clothes	210	53%	24%	100	£0.29	£1.79

Second Hand Clothes



02/02

Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
second hand branded clothes	140	-18%	0%	100	£0.27	£2.15
preloved dress	110	24%	91%	100	£0.24	£1.78
second hand ladies clothes	90	143%	143%	100	£0.23	£1.65
second hand luxury clothes	90	57%	22%	99	£0.32	£3.63
secondhand clothing	70	143%	325%	88	£0.21	£1.43
2nd hand dresses	50	0%	200%	100	£0.21	£1.90
2nd hand mens clothes	40	-40%	0%	100	£0.31	£2.13
mens secondhand clothing	30	-100%	0%	-	-	-
second hand summer dresses	30	25%	150%	100	£0.11	£1.13
preloved mens clothes	20	-25%	-25%	100	£0.25	£1.99
second hand mens jackets	20	0%	0%	100	£0.05	£0.58
preloved mens clothes	20	100%	100%	98	£0.37	£2.07
second hand summer dresses	20	300%	33%	100	£0.13	£1.59
they them clothes	10	0%	0%	100	-	-
they them shirt	30	100%	-82%	100	£0.19	£0.84

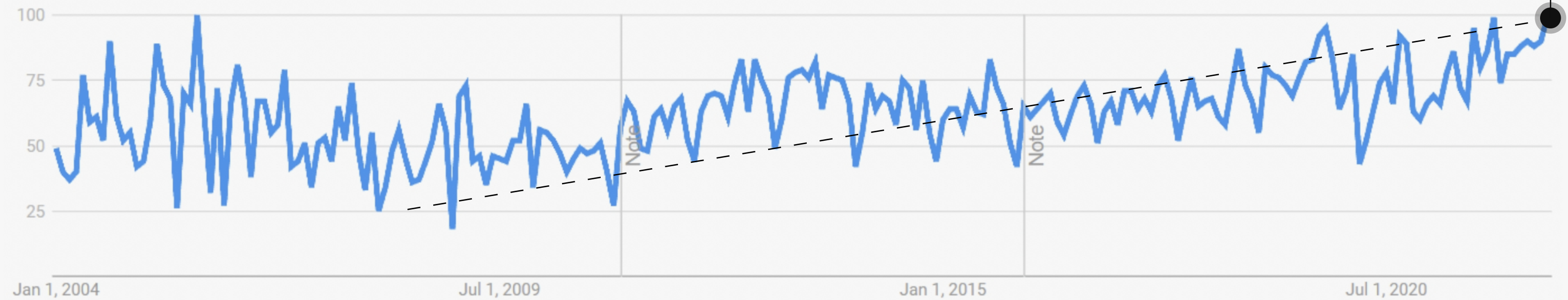
## Second Hand Clothes



UNITED KINGDOM

2004 - PRESENT

We can see searches for “second hand clothes” have increased from Google Trend data. **YoY is up by 50%.**



# ‘Second Hand Clothes’



Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
sustainable clothing brands	4,400	-19%	-19%	100	£0.53	£1.13
sustainable fashion brands	2,900	-17%	-17%	100	£0.58	£1.07
ethical clothing brands	1,600	0%	-19%	100	£0.53	£1.25
sustainable mens clothing	880	22%	-18%	100	£0.66	£1.98
ethical fashion brands	480	-18%	-46%	100	£0.52	£1.16
sustainable women's clothing	390	23%	23%	100	£0.58	£1.83
ethical mens clothing	320	0%	-18%	100	£0.72	£2.09
eco friendly clothing brands	210	-18%	-56%	100	£0.56	£1.17
eco clothing brands	210	0%	24%	100	£0.52	£1.22
organic clothing brands	170	27%	-18%	100	£0.46	£1.15
ethical women's clothing	170	21%	0%	100	£0.64	£1.50
sustainable dress brands	140	53%	136%	100	£0.37	£1.05
ethical clothing companies	110	27%	0%	100	£0.53	£1.28
sustainable clothing brands men	110	22%	35%	100	£0.62	£1.62
sustainable plus size clothing	90	22%	0%	100	£0.37	£0.93





Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
ethically sourced clothing	90	0%	-36%	100	£0.52	£1.17
sustainable brands clothing	90	-36%	29%	100	£0.62	£1.83
sustainable fashion companies	90	0%	-18%	100	£0.56	£0.92
sustainable clothing companies	70	29%	29%	100	£0.59	£1.42
sustainable mens clothing brands	70	-43%	-43%	100	£0.69	£2.12
eco friendly fashion brands	70	-44%	-29%	100	£0.48	£0.98
environmentally friendly clothing brands	50	-40%	-40%	100	£0.53	£1.38
unisex fashion	140	0%	0%	100	£0.21	£3.56
sustainable unisex clothing	10	0%	0%	100	-	-
unisex fashion brand	30	-25%	50%	100	£0.29	£0.71
unisex clothing brands	90	-18%	0%	100	£0.33	£2.51

# Sustainable Fashion Brands



UNITED KINGDOM

2004 - PRESENT

We can see that the term 'sustainable fashion brands' has **risen sharply in the last 5 years.**



# ‘Sustainable Fashion Brands’



Recycling Clothes



01/02

Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
recycling clothes	5,400	0%	-18%	48	£0.41	£1.07
recycle old clothes	720	0%	0%	17	£0.42	£1.65
recycled fashion	590	22%	50%	32	£0.31	£0.76
recycled shirts	320	23%	-18%	100	£0.49	£1.80
recycle dress	210	53%	53%	100	£0.26	£0.81
recycle jeans	170	-18%	-56%	92	£0.40	£0.91
recycling socks	170	0%	-18%	99	£0.47	£1.43
recycled plastic clothing	140	0%	-47%	100	£0.28	£1.21
clothes and shoes recycling	110	29%	-47%	26	£0.44	£1.65
recycled coat	110	0%	-25%	98	£0.31	£1.53
recycle old socks	90	0%	-36%	3	-	-
garment recycling	70	-25%	-67%	21	£0.41	£1.57
recycled cotton clothing	40	-40%	0%	100	£0.41	£0.92
shorts recycling	40	-20%	-20%	6	£0.83	£22.23
recycle old jeans	30	-50%	-71%	14	-	-

Recycling Clothes



02/02

Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
recycle your clothes	30	67%	-29%	38	£0.44	£1.33
recycled clothes online	30	0%	-75%	100	£0.43	£2.13
recycled designer clothes	30	100%	-20%	99	£0.27	£1.97
reusing old clothes	30	0%	-33%	3	-	-
used clothes recycling	30	33%	-20%	31	£0.44	£2.00
recycled fabric clothes	20	100%	0%	95	£0.23	£0.65
recycled sweater	20	0%	0%	88	£0.30	£0.60
recycled wool sweater	20	0%	0%	100	-	-
jean recycling	10	0%	0%	100	-	-
recycle blue jeans	10	0%	0%	100	-	-



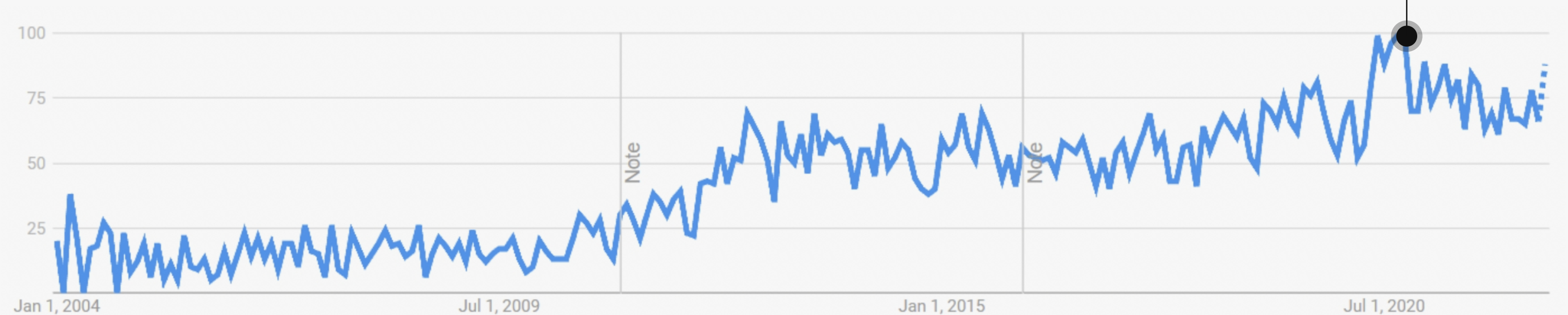
# Recycling Clothes



UNITED KINGDOM

2004 - PRESENT

**We can see interest in “recycling clothes” has increased in 2020**  
from Google Trends data. In 2021 we saw a decrease caused by the  
effects of COVID 19 and a national lockdown for the UK.



‘Recycling Clothes’



Keyword - UK	Monthly Searches (Average)	3 Month Change	YoY Change	Competition (Indexed Value)	Top of Page Bid (Low Range)	Top of Page Bid (High Range)
upcycled clothes	1,300	0%	-16%	100	0.47	1.58
upcycled clothing	1300	0%	-16%	100	0.47	1.58
circularity fashion	590	-18%	0%	28	0.49	£2.66
upcycling fashion	480	0%	23%	99	0.66	2.26
jeans upcycle	170	0%	-35%	100	0.44	1.51
repurposed clothing	140	0%	-21%	97	0.33	1.21
upcycle old clothes	90	0%	-36%	44	0.96	1.65
upcycled dress	90	22%	22%	100	0.22	1.17
refashion clothing	50	0%	-29%	100	-	-
reusing old clothes	30	0%	-33%	3	-	-
upcycle old jeans	30	0%	-40%	100	-	-
upcycle sweatshirt	30	0%	-33%	87	-	-
upcycled vintage clothing	30	0%	-60%	95	-	-
repurposing and upcycling clothes	20	0%	-33%	96	-	-
upcycle sweater	20	100%	0%	95	-	-



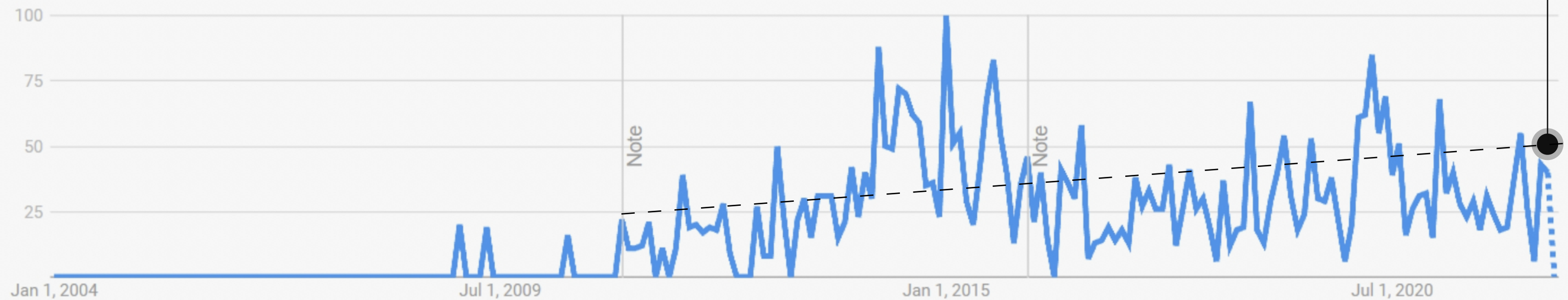
# Upcycling Clothes



UNITED KINGDOM

2004 - PRESENT

We can see interest in “upcycled clothes” has increased in 2020. YoY searches will be down due to COVID 19. **Interest in this keyword has been maintained over the last decade.**



‘Upcycling Clothes’

# The fashion industry's impact on the environment

From astonishing carbon emissions to incredibly high water usage and pollution; from needless levels of plastic to shocking consumerism – the fashion industry is doing untold damage to our planet.

And that's even before taking into account some working conditions across the world which have been described as 'modern slavery'.

**Here are some snippets of facts and figures which have been published in recent years...**



**10% OF THE WORLD'S TOTAL CARBON FOOTPRINT COMES FROM THE APPAREL INDUSTRY (AS A COMPARISON, THE ENTIRE AVIATION INDUSTRY IS 2%). APPAREL IS ALSO THE SECOND LARGEST POLLUTER OF FRESH WATER GLOBALLY.**

**- WORLD ECONOMIC FORUM**

**IT ALSO ACCOUNTS FOR A FIFTH OF THE 300 MILLION TONS OF PLASTIC PRODUCED GLOBALLY EACH YEAR. POLYESTER, A UBIQUITOUS FORM OF PLASTIC THAT'S DERIVED FROM OIL, HAS OVERTAKEN COTTON AS THE BACKBONE OF TEXTILE PRODUCTION.**

**- BLOOMBERG**

**ANNUALLY IT DUMPS AROUND HALF A MILLION TONS OF PLASTIC MICROFIBRE INTO THE OCEANS.**

**- NATIONAL GEOGRAPHIC**

**THE FASHION INDUSTRY IS RESPONSIBLE FOR 20% OF GLOBAL WASTEWATER.**

**- UNITED NATIONS ENVIRONMENT PROGRAMME**

**THE NUMBER OF GARMENTS PRODUCED ANNUALLY HAS DOUBLED SINCE 2000 AND EXCEEDED 100 BILLION FOR THE FIRST TIME IN 2014: NEARLY 14 ITEMS OF CLOTHING FOR EVERY PERSON ON EARTH.**

**- MCKINSEY**

**ACROSS NEARLY EVERY APPAREL CATEGORY, CONSUMERS  
KEEP CLOTHING ITEMS ABOUT HALF AS LONG AS THEY DID  
15 YEARS AGO.**

**– MCKINSEY**

**WE HAVE PURCHASED 100% MORE ITEMS OF CLOTHING THIS  
YEAR THAN WE DID JUST 30 YEARS AGO AND WE WEAR THOSE  
PIECES ON AVERAGE ONLY SEVEN TIMES BEFORE GETTING RID  
OF THEM. GLOBALLY THAT ADDS UP TO AN ASTONISHING 150  
BILLION NEW CLOTHING ITEMS MADE ANNUALLY.**

**WORLD ECONOMIC FORUM**

**87% OF THE TOTAL FIBRE INPUT USED  
FOR CLOTHING IS ULTIMATELY  
INCINERATED OR SENT TO A LANDFILL.**

**– BLOOMBERG**

**TEXTILE DYEING IS ALSO THE SECOND LARGEST  
POLLUTER OF WATER GLOBALLY AND IT TAKES  
AROUND 2,000 GALLONS OF WATER TO MAKE A  
TYPICAL PAIR OF JEANS.**

**– UNITED NATIONS ENVIRONMENT PROGRAMME**



**EVERY SECOND, THE EQUIVALENT OF  
ONE GARBAGE TRUCK OF TEXTILES IS  
LANDFILLED OR BURNED.**

**– UNITED NATIONS ENVIRONMENT PROGRAMME**

**LAUNDRY ALONE CAUSES AROUND HALF A MILLION  
TONNES OF PLASTIC MICROFIBRES TO BE RELEASED  
INTO THE OCEAN EVERY YEAR—THE EQUIVALENT OF  
ALMOST THREE BILLION POLYESTER SHIRTS.**

**– UNITED NATIONS ENVIRONMENT PROGRAMME**

**GERMANY OUTPERFORMS MOST COUNTRIES BY COLLECTING  
ALMOST THREE-QUARTERS OF ALL USED CLOTHING, REUSING  
HALF AND RECYCLING ONE-QUARTER. ELSEWHERE,  
COLLECTION RATES ARE FAR LOWER: 15 PERCENT IN THE  
UNITED STATES, 12 PERCENT IN JAPAN, AND 10 PERCENT IN  
CHINA.**

**– MCKINSEY**

**ABOUT 60% OF MATERIAL MADE INTO CLOTHING IS  
PLASTIC, WHICH INCLUDES POLYESTER, ACRYLIC AND  
NYLON TEXTILES.**

**– UNITED NATIONS ENVIRONMENT PROGRAMME**

## The fashion retailers fighting back

While the numbers paint a damning picture of the industry, some fashion retailers and disruptors in the sector are beginning to fly the sustainability flag.

As our search data shows, there's a considerable amount of work to do to convince consumers to change their fast-fashion buying habits, but at least there are signs of individual businesses doing their bit.

One of the most well-known sustainable brands is Patagonia, which has been producing fleece jackets using polyester made from recycled bottles since 1993. Customers are also encouraged to recycle or repair their garments.

The Isle of Wight is the home of Teemill, a true disruptor changing the way T-shirts are made. It sources organic cotton and uses a sustainable spinning, dyeing and weaving process in factories powered by renewable energy.

Once customers have got their wear from the T-shirt, they can return it to Teemill to be recycled into new T-shirts. Customers receive credit for future purchases as an incentive.

Popular high street name H&M has introduced a repair and recycle scheme while Nudie Jeans uses organic cotton and offers free repairs for life. Customers also get a discount if they recycle their old jeans.

In Spain, Ecoalf makes shoes from algae and recycled plastic; in Amsterdam, chewing gum is being collected by GumDrop and turned into rubber to make shoes; in Bali, Indosole is making shoes, sandals and flip-flops from discarded tyres.

And then we have Tala, which uses recycled, upcycled and natural fabrics to make its sustainable activewear and athleisure.

These are brands making sustainability work, coming up with innovative methods of fighting back against the fashion industry's pollution and waste.



## Green fashion needs to be the future

The advent of fast fashion has changed the world – and not for the better. The industry pollutes more while we throw away more. It can't continue like this.

There are pockets of individual brands trying to fight the tide of consumerism, and there's evidence that some of our habits might be changing, but it needs to be done quicker and on a much larger scale.

So there's a job to do – and it's on everyone to do their bit: the industry, the businesses and the consumers. The message needs to spread far and wide that sustainable fashion simply has to be the future.

**We need less fast fashion. More green fashion.**

**If you'd like to speak to us about how we can support your fashion brand's sustainability journey, please drop us a line:**

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