

FASHION – INCLUSIVITY AND DIVERSITY – GERMANY – 2023

Inclusivity and diversity in fashion is becoming more nuanced as expectations towards brands/retailers evolve.



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Fashion – Inclusivity And Diversity – Germany – 2023

This report looks at the following areas:

- How inflation, legislation and Germany's demographic structure have shaped consumer expectations around inclusivity and diversity
- Consumer priorities relating to diversity
- Behaviours around and attitudes towards diversity, which show that most consumers would like to see brands do more to prove their diversity and inclusivity credentials
- The struggles consumers are experiencing and its implications
- What makes consumers see brand/retailer advertising and communication as inclusive and diverse



Inclusivity and diversity in fashion is becoming more nuanced as expectations towards brands/retailers evolve.

Overview

54% of Germans think **fashion companies have a long way to go to be truly inclusive**. While the cost-of-living crisis is discouraging spending on fashion, the need for **inclusivity and diversity will continue to grow**, similar to how sustainability evolved into being an industry standard.

The fashion industry has made progress in recent years and is slowly but steadily becoming more diverse. From **presenting models of many colours, body sizes and gender identities to developing adaptive clothing lines for individuals with disabilities**. But the fact that 64% of

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Germans find beauty standards in the fashion industry outdated shows that much effort is needed to guarantee that fashion really represents all people.

Besides being more diverse in marketing and advertising, **adapting collections to the actual needs of consumers** is another big step that companies have to take. There is still a strong conviction that thin is the 'ideal' body type, which causes many brands/retailers to avoid stepping into the plus-size market despite **41% of Germans** struggling to find clothes that fit them.

To avoid accusations of inauthenticity, it is vital that fashion brands **carefully consult their customers and identify their attitudes towards change**, since **49% of Germans** think that fashion brands/retailers only act inclusive to make a profit.

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Report Content

EXECUTIVE SUMMARY

Key issues covered in this Report

- Overview
- The five year outlook for fashion – inclusivity and diversity

Market context

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 - Graph 1: spending on clothing and footwear per month and household in €, 2020
- Overweight and plus-sized Germans are a growing consumer group
- Germany to become a super-aged society
 - Graph 2: old-age dependency ratio with moderate net migration*, 2020-35

Opportunities

- Future-proof your company with DEI measurements
- Cater to unseen and neglected target groups
- Adapt your advertising to consumer preferences
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 - Graph 3: key economic data, in real terms, 2019-24
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- Cost-of-living crisis forces people to cut back on fashion expenses
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 - Graph 21: struggles to find gender-neutral fashion items by generation, 2023
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- Curating inclusive footwear: high heels in large sizes
- Empowering inclusivity through AI
- Introduce adaptive clothing to expand appeal
- Zalando introduced adaptive fashion in 2022
- Zalando onboards Black-owned brands

Advertising and marketing activity

- Asos shows fashion on different sized models
- H&M fosters an inclusive company culture
- Colourful Pride Month campaign highlights importance of expressing individuality
- Sheego creates a positive, plus-size body image
- Empowering curvy women to be proud of themselves

APPENDIX

Appendix – abbreviations and consumer research methodology and language usage

- Abbreviations
- Consumer research methodology
- A note on language

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