

Resizing Fashion

Reimagining fashion culture

Key messages

- Advertising and demand-inducing marketing are key drivers of fashion overconsumption.
- In recent years, social media has become the key channel for fashion brands to aggressively market their products, often using highly targeted and impulsive sales tactics that exploit weak regulation, encouraging overconsumption and increasing financial and consumer-protection risks.
- As architects of desire, the advertising industry drives and sustains consumerist culture, values and aspirations, in which buying and owning material goods signals status and wellbeing.
- These dynamics have been intensified by the growth in paid influencer marketing and sponsored social media content, driving significant negative environmental and wellbeing impacts.
- Current policy proposals have been limited to addressing greenwashing and false advertising claims, which is merely the tip of the iceberg in terms of the impacts of advertising.

Policy Recommendations

- Regulate the volume and messaging of fast fashion advertisements on social media channels.
- Use Extended Producer Responsibility frameworks to penalise companies that rely on aggressive advertising and marketing practices.
- Explore alternative financing models for social media, to reduce the dominance of advertising in social spaces.
- Explore incentives and partnerships to leverage the cultural reach and power of persuasion of the advertising industry to drive a shift towards more sustainable and equitable lifestyles.
- Use education (formal and informal) and public campaigns to foster alternative non-consumerist values and aspirations.
- Regulate and redesign how public space is used to support citizen wellbeing and reduce overconsumption.



Current Status and Trends

Billions of dollars are spent every year by fashion companies looking to shape consumer desires and increase sales. Globally, advertising is a 1 trillion-dollar industry and advertised emissions – the GHG emissions linked to sales driven by advertising - can exceed an advertising agency’s operational footprint by more than 40 times (Purpose Disruptors, 2025).

Ultra-fast company Temu reportedly spent \$14 million for two 30-second slots during the 2023 Super Bowl, while market analysis suggests its quarterly marketing investments total at \$500 million (McKinsey, 2023). The same dynamics can be observed among luxury brands, LVMH spent approximately \$10.6 billion on worldwide advertising and promotion in 2024 (Statista, 2025).

In recent years, digital platforms and social media have been a catalyst for the proliferation of fast fashion business models. Digital advertising now claims 67% of overall ad spend in Europe, representing a 16% year on year increase, with social media ranking among the top performing channel (IAB Europe, 2025). In France, between 2013 and 2023, there was **+1,000% increase** in online advertising spend for **textile products** (Republique Francaise, 2024).

When Instagram launched in 2010, the platform didn't show ads. Ads were introduced experimentally in 2013 and then opened more widely from 2015 onward — after that Instagram has become a full ad product with feed ads, then stories, explore, reels, shopping placements and now in-app shopping.

In 2023, Temu - the Chinese fast fashion giant - was META's top advertiser spending nearly 2 billion on adverts (Mattioli et al., 2024).

Social media ad reach in Germany 2025, by platform (in % of adult population)

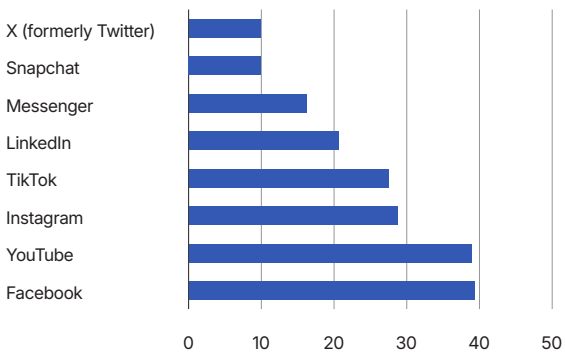


Figure 1. Social media ad reach in Germany 2025, by platform (in % of adult population).

Source: Statista

Social media advertising spending in Germany 2017–2030 (in billion U.S. dollars)

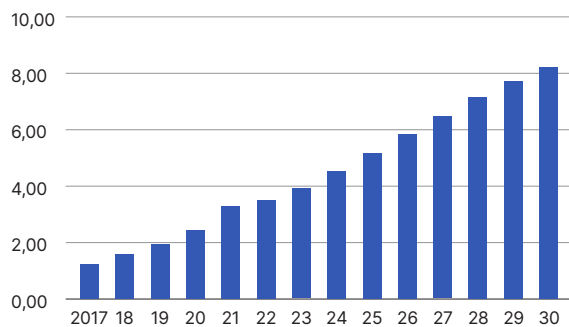


Figure 2. Social Media advertising spending in Germany 2017–2030.

Source: Statista

Impacts

Wellbeing Impacts

- The continual renewal of fashion trends pushed through advertisement places pressure on consumers to update wardrobes, resulting in a strong psychological burden. This burden is particularly strong on younger women.
- Several studies show experiences of negative wellbeing impacts among over-consumers of fashion due to status competition, stressful choices, time pressures and financial debt (Kasser & Kanner, 2004; Wahnbaeck & Roloff, 2017; Donnelly et al, 2012).
- Evidence suggests that advertising affects children and adolescents more strongly, and that people experiencing financial stress may also be more influenced due to the cognitive demands of managing limited resources. (Republique Francaise, 2024).

87% of French Consumers think that advertising pressure is excessive (Republique Francaise, 2024).

Environmental Impacts

- Textile consumption in the EU, in 2020, had the 4th highest impact on the environment and climate change from a global life cycle perspective, after food, housing, and mobility (EEA, 2022).
- Advertising overwhelmingly promotes consumerism, while campaigns supporting sustainable ways of living remain severely out-funded and marginal by comparison (UNEP, 2023)
- Promoting social media content by peers has been shown to significantly increase propensity to consume (Frick et al., 2021; Wahnbaeck & Roloff, 2017; Zero Waste Europe, 2023).
- The market concentration that results from advertising in fashion also creates significant market entry barriers for smaller, more sustainable and circular brands. This is limiting progress in establishing and scaling circular business models and ultimately harms Europe competitiveness in the sector (EEA 2025 forthcoming).



Over-two thirds (69%) of leaders in the European ad industry agree with the statement: “The industry drives consumption of environmentally-intensive products and should, in the long run, consider the carbon footprint of this consumption”.

(IAB Europe, 2026)



What is behind the trends?

Unpacking Systemic Lock-ins: The Aspiration Accelerator

Together with domain experts we mapped three key reinforcing dynamics which explain the trends and impacts observed in relation to advertising and overconsumption.

Through their marketing and advertising expenditure, fashion brands play a significant role in shaping **fashion trends** and promoting a **consumerist culture** (Bocken et al., 2022; Dinner et al., 2014; Frick et al., 2021; Fuchs et al., 2021). As reflected in R1 (Figure 3) the frequency of new collections of fashion brands and the exposure to continuous advertisement campaigns, leads to rapid **trend cycles** and the consumption of garments with very low **emotional durability** (Assadourian, 2025). It is this lack of emotional durability, rather than physical durability, that drives consumers to **demand** new garments when they fall out of fast changing trends (Republique Francaise, 2024).

As demonstrated by R2 the growth in **social media** advertising brings an increasingly pervasive and personal dynamic allowing brands to influence their target consumers' purchasing behaviour more directly, target-

ing products based on a greater understanding of their tastes and preferences (Dash & Piyushkant, 2020; Dinner et al., 2014; European Commission. Joint Research Centre., 2020). Influencers and online content creators are increasingly being used by brands as a low-cost marketing option, to promote their products on a peer-to-peer basis with consumers, tapping into their wants and desires more directly (Denisova, 2021).

In addition to shaping fashion trends, advertising plays a significant role in manufacturing desire which leads to consumption well beyond our needs. As demonstrated by R3 (Figure 3) advertising also feeds a wider **consumerist culture**, in which the acquisition of consumer goods is associated with higher wellbeing and status (Assadourian, 2025). In a context of growing **social media use**, the fact that social media companies rely so heavily on advertisers (97-98%) for their revenue (Raffoul et al., 2023), further cements to the dominance of consumerism within our society.

Recent work frames these dynamics as part of a wider "human behaviour crisis," in which once-adaptive traits, such as preference for immediacy, social status, and novelty, are redirected by fast fashion's growth-driven model, short-term trends, and marketing manipulation, reinforcing resource-intensive consumption (Merz et al., 2023).

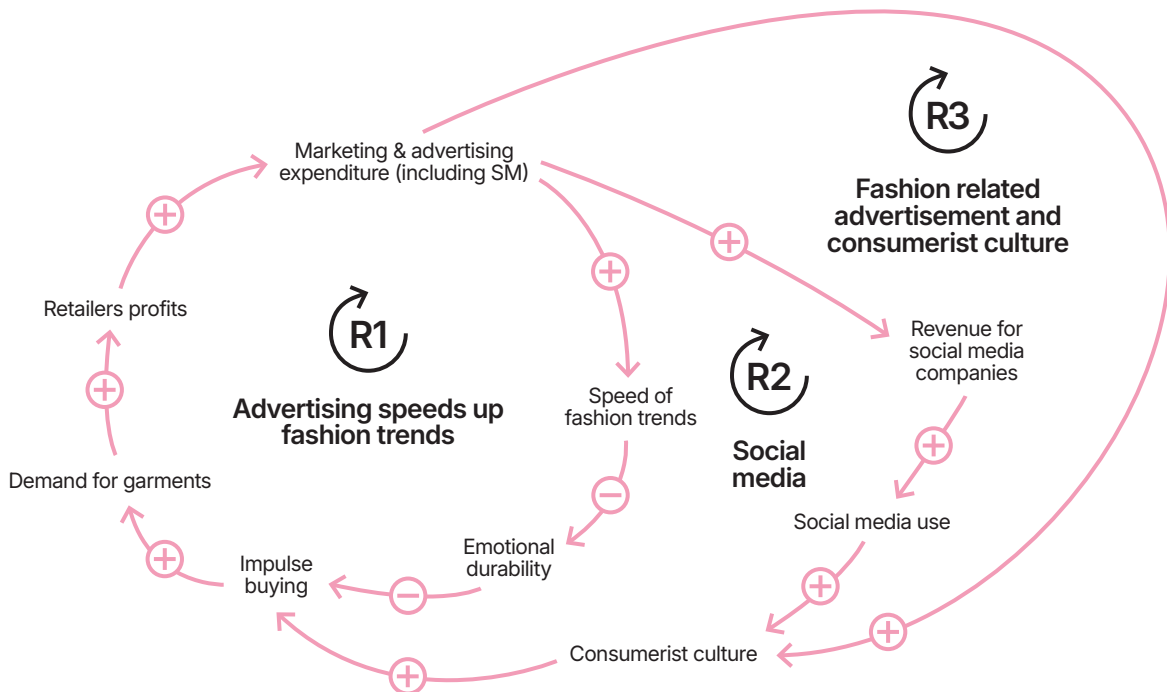


Figure 3. The Aspiration Accelerator: Systems Mapping of advertisement and overconsumption.

A causal loop diagram defines the relationship between different parts of the system. In this diagram, + arrows indicate that two variables move in the same direction. In contrast, - arrows indicate that two variables move in opposite directions.

Reinforcing Loop (R): A reinforcing loop is a feedback loop that amplifies change. Whatever direction the system is moving in growth or decline, it will continue accelerating in that same direction becoming a systemic lock-in.

Current Progress in Fashion Policy

GAPS AND CHALLENGES

To date policy efforts at addressing advertising in relation to fashion have focussed narrowly on greenwashing. Under the Green Claims act, the commission has introduced several pieces of legislation aimed at limiting the use of false or misleading environmental claims. However, greenwashing is very much the tip of the iceberg when it comes to the environmental impacts of advertising. The legislation does not acknowledge the structural role of advertising in manufacturing desire and normalising over-consumption behaviours (Purpose Disruptors, 2025).

A Transformative Policy Framework

The Iceberg Model illustrates that the most influential drivers of fashion’s impacts lie beneath the surface in the system’s structures and mental models. Addressing these root causes requires policies that go beyond symptom-focused measures (REACT and ANTICIPATE) and instead target the incentives, power structures and mental models that lock in overproduction and overconsumption (REDESIGN and DISRUPT).

While REACT and ANTICIPATE measures alone cannot transform the system, they nonetheless serve an

In Systems Thinking “Shifting the Burden” describes a situation where policy makers embrace *symptomatic solutions*, such as better information and more accurate environmental claims, while leaving the *root causes* of unsustainable consumption untouched. This enables the system to continue as it stands and embeds the belief that we can simply shop our way out of the problem.

important role within the policy mix—particularly in the short run—while the deeper structural and cultural changes needed for long-term transformation are being developed. That said, policy makers must not delay action and need to act with urgency to ensure that transformative measures (REDESIGN and DISRUPT) are included within the policy mix. Without them, incremental improvements will be consistently outpaced by the growth in production, consumption, and environmental pressure.

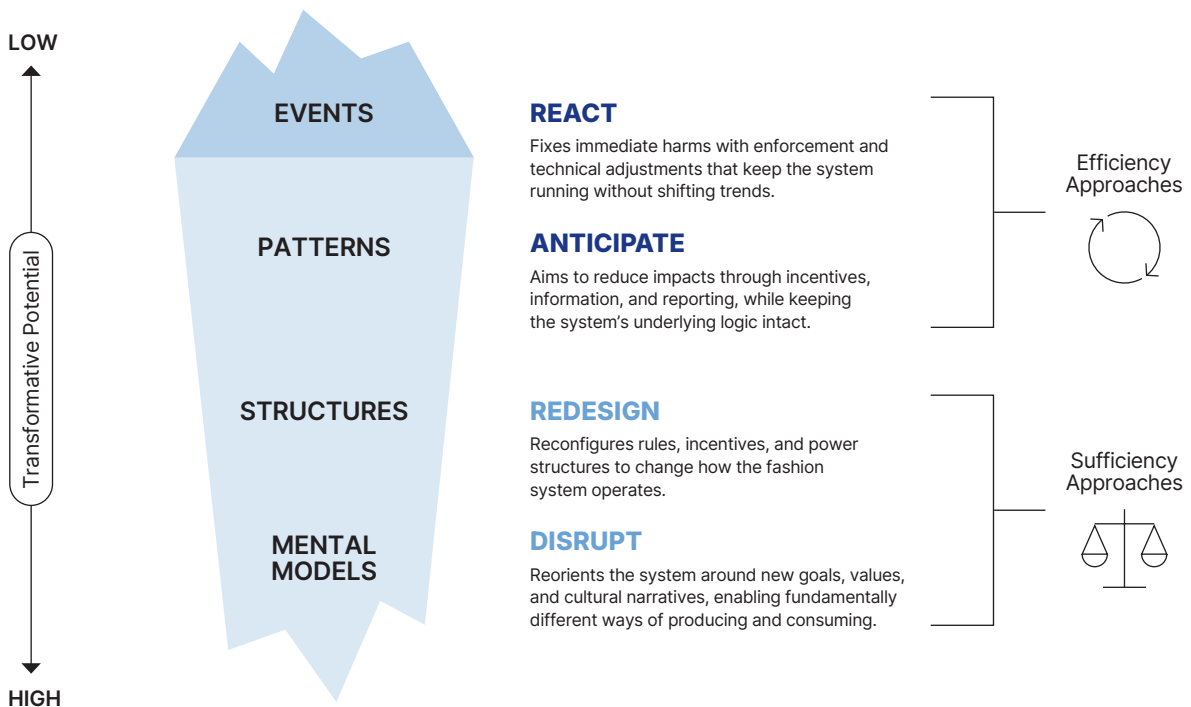


Figure 4. The Iceberg Model: A Systems Approach for Policy Making based on Donella Meadows leverage framework. (Hot or Cool)

The next section presents a non-exhaustive analysis of co-created policies operating at various levels of transformation and, where appropriate, provides recommendations on how to adapt existing processes to support effective implementation.

REACT

Fixes immediate harms with enforcement and technical adjustments that keep the system running without shifting trends.

Limiting ad exposure: French lawmakers have approved a set of measures to limit advertising for fast fashion, including a ban that extends to social media particularly for influencers. These policies are now being negotiated at the EU level to ensure they are in line with competition law. Whilst these measures are beginning to address the forces driving overconsumption, the legislation has limited the ban to target 'ultra fast fashion' companies only. The ban thus hinges on technical definitions which brands can find loopholes around and which only addresses some of the worst offenders in fashion overproduction. Ultimately, these measures do not go deep enough in addressing the profit incentives which drive the current advertising landscape.

ANTICIPATE

Aims to reduce impacts through incentives, information, and reporting, while keeping the system's underlying logic intact.

To begin addressing the incentives at play for fashion brands and advertising agencies, policy makers could explore the use of financial incentives. In many countries – including Germany, France and the Netherlands - advertising currently exists as a deductible expense, meaning companies subtract them from their taxable income. Policy makers could thus consider reversing these incentives, instead placing a tax on advertising spend of companies, to reduce the volume and frequency of fashion campaigns.

Extended Producer Responsibility (EPR) frameworks also present a huge opportunity to target the unsustainable marketing and advertising practices associated with high-volume business models. EPR fees could be eco-modulated based on company advertising practices; including ad spend, number of ads, frequency of new collections and campaigns, volume of products placed on the market along with the use of influencers and targeted ads.

Methodologies now exist for calculating the emissions generated through advertisement.

Advertised Emissions = Ad spend x ROI X Carbon Intensity.

(Purpose Disruptors)

REDESIGN

Reconfigures rules, incentives, and power structures to change how the fashion system operates.

Social media regulation: Given the growing importance of social media within the advertising landscape, policy makers must focus attention on regulating this channel effectively, limiting the frequency of adverts on feeds, preventing the use of personal data to create targeted adverts and tackling the use of social media influencers to deliver low-cost adverts.

Profit-driven social media firms have a financing model that is entirely reliant on income from advertisement and the collection of personal data (EU Commission, 2020). Policy makers could thus consider measures to explore alternative financing models for social media, either through user payments or state funding, to avoid the lock-in with advertising sector and the promotion of overconsumption.

DISRUPT

Reorients the system around new goals, values, and cultural narratives, enabling fundamentally different ways of producing and consuming.

Transforming Aspirational Systems: To truly transform the fashion system, we need interventions that shift the mental models driving overconsumption. There is thus an urgent need to counteract consumerist aspirations about the good life and for alternative storytelling to challenge the deeply internalised belief that the continuous acquisition of material goods will improve our wellbeing (Assadourian, 2025; Hot or Cool Institute, 2026). Consumption has become a means of expressing social status, shaping self-identity and self-worth. There is however strong evidence which shows that some of the most important sources of life satisfaction and wellbeing are nonmaterial in nature (Wallinger and Schulz, 2023).

Evidence-based knowledge on the effects of consumption on wellbeing should be part of formal and informal education, as an antidote to the continuous messaging from advertising about how we can buy happiness. Formal education could focus on inner sources of value and self-worth, to counteract consumerist values. It should also embed the knowledge and skills needed to engage in sustainable fashion consumption, from repair to upcycling and sewing classes. Education must go beyond simply imparting knowledge, but rather should encourage reflection on and transformation of the relationship with consumption in the context of our current society and culture (Schrader & Fischer, 2025).



‘We need storytelling and image making that demonstrate alternative models of status and success, decoupling identity from newness and recalibrating what is deemed aspirational’.

(UNEP, 2023)

Relove Fashion is a national competition in Ireland which challenges secondary school students to explore creative reuse options such as upcycling, repairs, alterations and mending, inspiring them to take a closer look at how their clothing is made (Rediscovery Centre, Ireland).

New Zealand’s education system embeds **Hauora**, a Māori philosophy of well-being, into its national curriculum.

Hauora’s dimensions:

- Taha tinana** – physical well-being
- Taha hinengaro** – mental/emotional well-being
- Taha whānau** – social well-being
- Taha wairua** – spiritual well-being

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The wider **media landscape** should also be utilised to educate on sustainable fashion consumption. Fashion models, film producers, photographers, fashion shows, film and TV play significant role in setting aspirations and images of the good life (Assadourian, 2025; UNEP, 2023). There is thus significant scope for public broadcasters to fund and incentivise the placement of sustainable fashion consumption behaviours in these contexts, to mainstream and normalise such behaviours.

Governments can play an active role in co-designing **public campaigns** with citizens and creative industries, to generate non-consumerist messaging and drive new sustainable imaginaries. For sustainability communications to be effective, narratives must be consistent, credible and sustained over time. Thus, significant investment is needed from public institutions to build and sustain alternative narratives to counteract the powerful daily messaging from the advertising industry.

Public space should be reimagined to support non-consumerist values. Building on the success of fossil fuel advert bans across many European cities (BBC, 2026), municipal law makers could consider the phase out of commercial advertising for fashion in public space. Advertising space should instead be reserved for circular businesses that have demonstrated environmental and social benefits. Learning from the success of public health interventions (Ashe et al., 2003), cities could also explore how to use zoning laws and land use to restrict the density or proximity of high-volume fashion retailers in order to reduce consumption. City leaders can explore shifting the use of public space away from consumption-based activities towards well-being enhancing activities, filled with communal spaces for repair and creativity instead of shopping malls. (Zero Waste Europe, 2024).



58% agreed 'it gives me more confidence that I don't need to buy things to feel happy.'

Through the Creative Ireland programme, the Irish Government funded a collective large-scale campaign which involved over 10 advertising agencies entitled 'Less Buying, More Being' and aimed to promote a more holistic understanding of wellbeing based on connection to each other and the natural world. The campaign was shared on TV, cinema, radio, outdoor advertisements, and online media and reached 80% of Irelands population.

Following the campaign, 58% of adults agreed "it gives me more confidence that I don't need to buy things to feel happy" and 73% agreed to shop in a climate conscious way buying less or purchasing products that can be recycled or reused (Purpose Disruptors, 2024).



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