

Methodology

All figures, unless otherwise stated, are from YouGov.

This global study was conducted online between 7th -18th January 2021, and is comprised of representative samples of the following 12 markets:

| Austria (AT) | 1054 |

| Germany (DE) | 2038 |

| Switzerland (CH) | 529 |

| UK | 2109 |

| Spain (ES) | 1026 |

| France (FR) | 1027 |

| Italy (IT) | 1024 |

| Bulgaria (BG) | 1013 |

| Netherlands (NL) | 1046 |

| Australia (AU) | 1060 |

| US | 1213 |

| South Africa (ZA) | 508 |

| TOTAL | 13647 |

In France, Spain and Italy, only Q4 and Q7 was asked.

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| [YouGov Profiles](#) | | YouGov Profiles makes it simple to find and understand the audience that matters most to you. It gives you the power to build and customise a portrait of your consumers' entire world with unrivalled granularity.

| [YouGov BrandIndex](#) | YouGov BrandIndex continuously measures the public's perception of thousands of brands every day. Tracking brands for many years, it gives you both a historical and instant view of your brand and campaign performance against your competitors.

Executive Summary

Awareness of animal cruelty issues

- Globally (i.e. across 9 markets, excluding ES, FR and IT), nearly two thirds (64%) of adults are aware of any animal cruelty issues in the fashion industry. Swiss adults (84%) and Austrian adults (83%) are most aware of any animal cruelty issues in the fashion industry, while Australians (56%) and US adults (46%) are the countries least aware.

Animal welfare and treatment concern levels in the fashion industry

- The category respondents are most concerned about (i.e. across 9 markets, excluding ES, FR and IT) with regards to the welfare and treatment of animals involved is fur, with nearly 8 in 10 (78%) very or fairly concerned. Austrians are the country most concerned about this with 89% concerned, while those in the US are the least concerned (57%).
- This is followed by exotic leather, with nearly three quarters (74%) very or fairly concerned. Again, Austrians are the country most concerned about this with nearly 9 in 10 (87% concerned), with those in the US being the least concerned (52%).
- 52% of global adults (i.e. across all markets) are concerned about animal welfare and treatment in feather/ down - South African adults are the most concerned (72%), while US adults are the least concerned (42%).
- Half of global adults (50%) are concerned about animal welfare and treatment in domestic animal leather - again, South Africans are the most concerned (72%), while Swiss adults are the least concerned (43%).
- Just over 3 in 10 adults globally (31%) are concerned about animal welfare and treatment in wool. Over half of South Africans (54%) are concerned, the highest out of all markets, while only 21% of Swiss adults are concerned, the lowest of all markets.

Executive Summary (continued)

Attitudes towards animal welfare in the fashion industry

- Globally (i.e. across 9 markets, excluding ES, FR and IT), the majority (60%) say fashion brands should be responsible for assuring animal welfare standard are upheld through their supply chains. 69% of South African adults agree with this attitude, the highest cross all markets.
- 54% of adults globally say fashion brands should be transparent about their standards when it comes to animal welfare. South African adults are also the market most likely to agree with this (62%).
- 44% of adults are concerned about animal welfare in the fashion industry in general - again, most likely among South Africans (55%).
- This is closely followed by 'brands need to better care for the animals in their supply chain' (42%) - with Germans most likely to agree (54%).
- 37% say they will choose one fashion brand over another if they prioritise animal welfare - Austrians are the country most likely to say this (53%).

Animal welfare/ ethics and companies today

- Nearly 7 in 10 (69%) adults globally (i.e. across all 12 markets) agree that ethical production appears increasingly important for companies today. with 24% strongly agreeing. South Africans are the country most likely to agree with this sentiment (80%), followed by France (78%) and Bulgaria (78%). Germans (59%) and US adults (58%) are the countries least likely to agree.
- A higher majority (86%) of adults globally agree that companies should make animal protection a key priority alongside environmental protection and social standards (e.g. working conditions etc.) within their Corporate Social Responsibility strategies and policies, with 51% strongly agreeing. Nearly all (96%) South Africans agree with this sentiment, followed by Bulgarians (92%). 69% of US adults agree with this statement.

Executive Summary (continued)

Mulesed sheep wool and Kangaroo welfare concerns

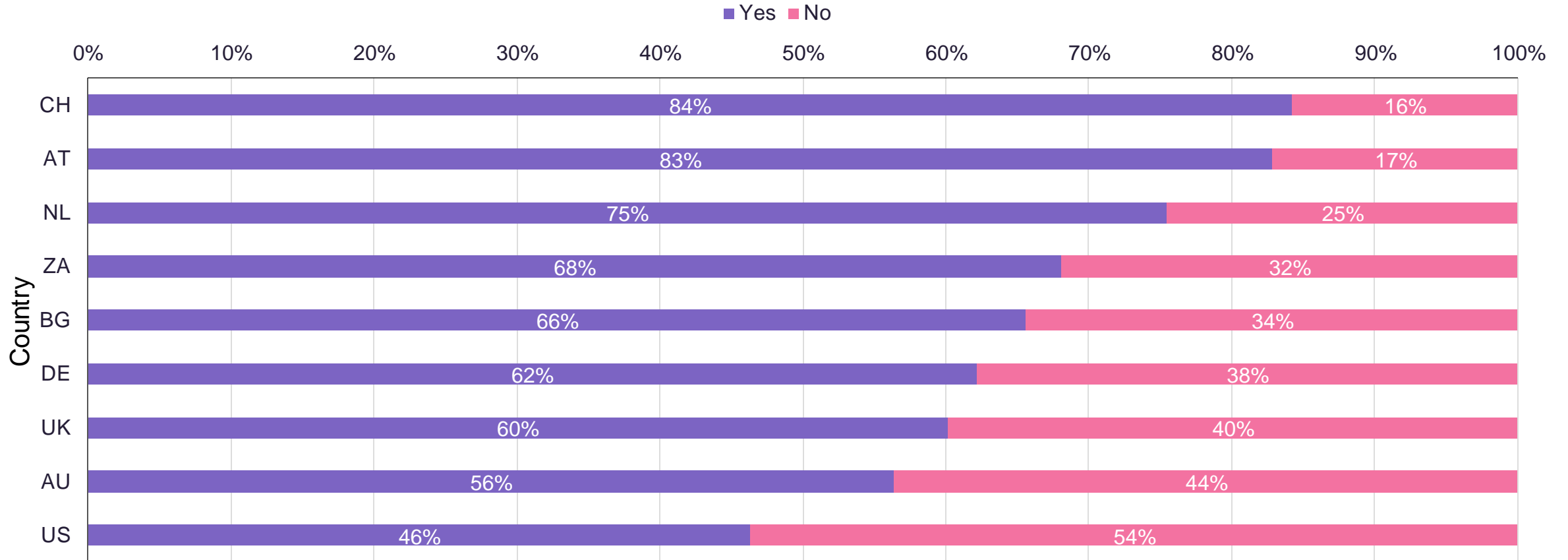
- After reading a description and information about mulesing, over three quarters (77%) of adults globally (i.e. across 9 markets, excluding ES, FR and IT), agree that retailers sourcing wool should phase out their use of mulesed sheep wool, with 51% strongly agreeing. South Africans are the country most likely to agree (87%), followed closely by Austria (86%). US adults are the least likely to agree (60%).
- After reading information and research on kangaroo killing in Australia, 84% of adults globally are very or fairly concerned for the welfare of these animals, with 56% very concerned. Nearly all South Africans (96%) are concerned, followed by Switzerland (90%) and Austria (90%). Interestingly, Australians (76%) along with US adults (73%) have the lowest concern levels in these markets.

Fashion purchasing habits since COVID-19 reached the country

- Globally (across all 12 markets), 50% of adults have changed their fashion purchasing habits since COVID-19 reached their country, and 50% have not. Bulgarians (76%) and South Africans (76%) are the most likely countries to have changed their habits, while only 35% of US adults and 32% of UK adults have made a change since COVID-19 arrived in their country.
- Nearly one fifth (17%) now seek out higher quality/ more durable fashion items that are also sustainable and have higher animal welfare credentials. French adults lead the way on this habit with over a quarter (27%) saying they have made this change since COVID-19 arrived in France. US adults are the least likely to have made this change (8%).
- Over one in ten (13%) have decided to now avoid animal-based fashion products all together. Bulgarians are the most likely to have made this change since COVID-19 arrived (28%), followed by South Africans (20%), while UK and French adults are the least likely to have done (8% respectively).
- 8% of adults globally now choose cheap / fast fashion items, with South Africans being the most likely (28%), and UK adults (3%) being the least likely.
- 5% now seek out higher quality/ more durable fashion items, regardless of their sustainability/ animal welfare credentials. Italian and French adults are the most likely to have made this change since COVID-19 (8%), while only 3% of Bulgarians and UK adults have done so.

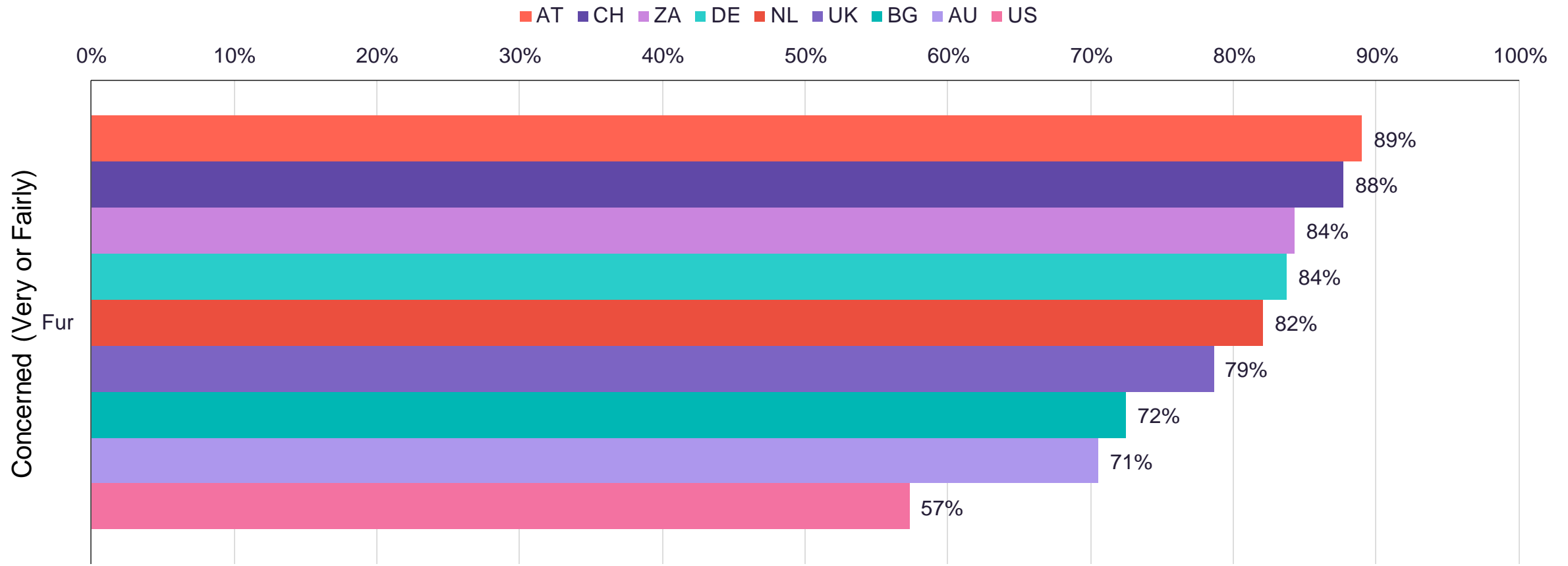
A. Awareness of animal cruelty in fashion industry

% Aware vs unaware of any animal cruelty issues in the fashion industry, ranked by country



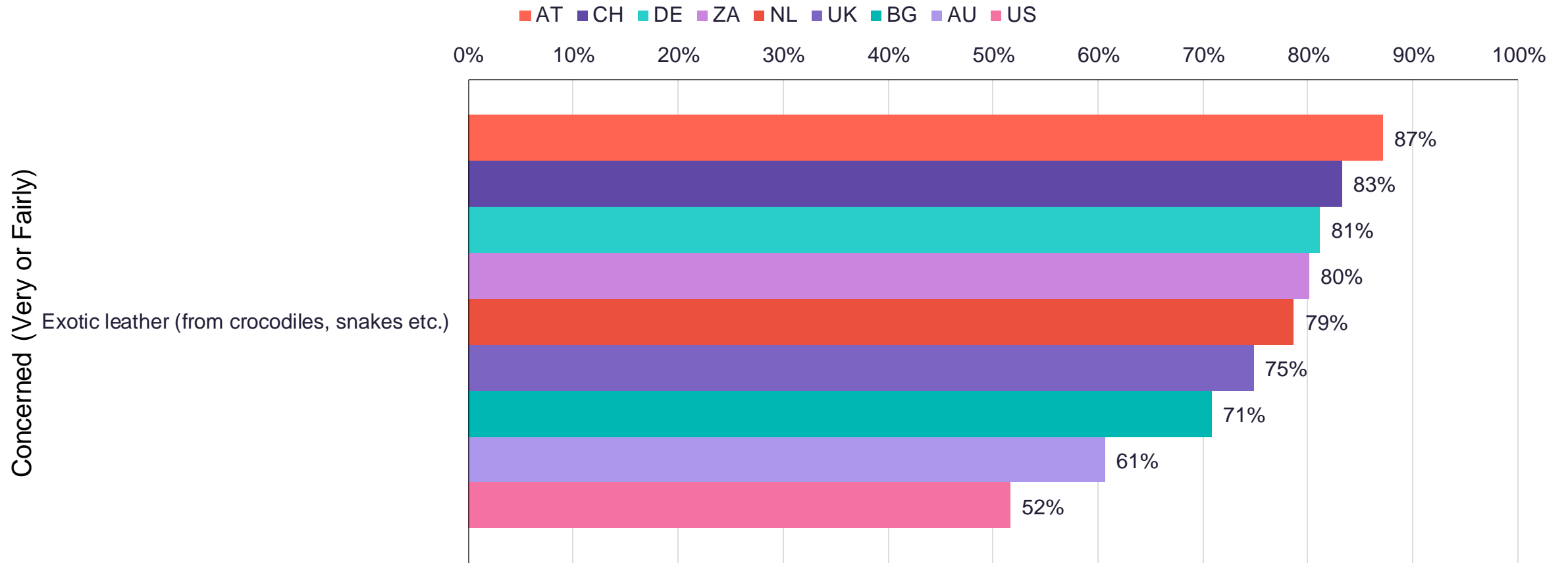
D. Concern levels of fur

% Concerned (Very or Fairly) about the welfare and treatment of animals in the fur category of the fashion industry, ranked by country



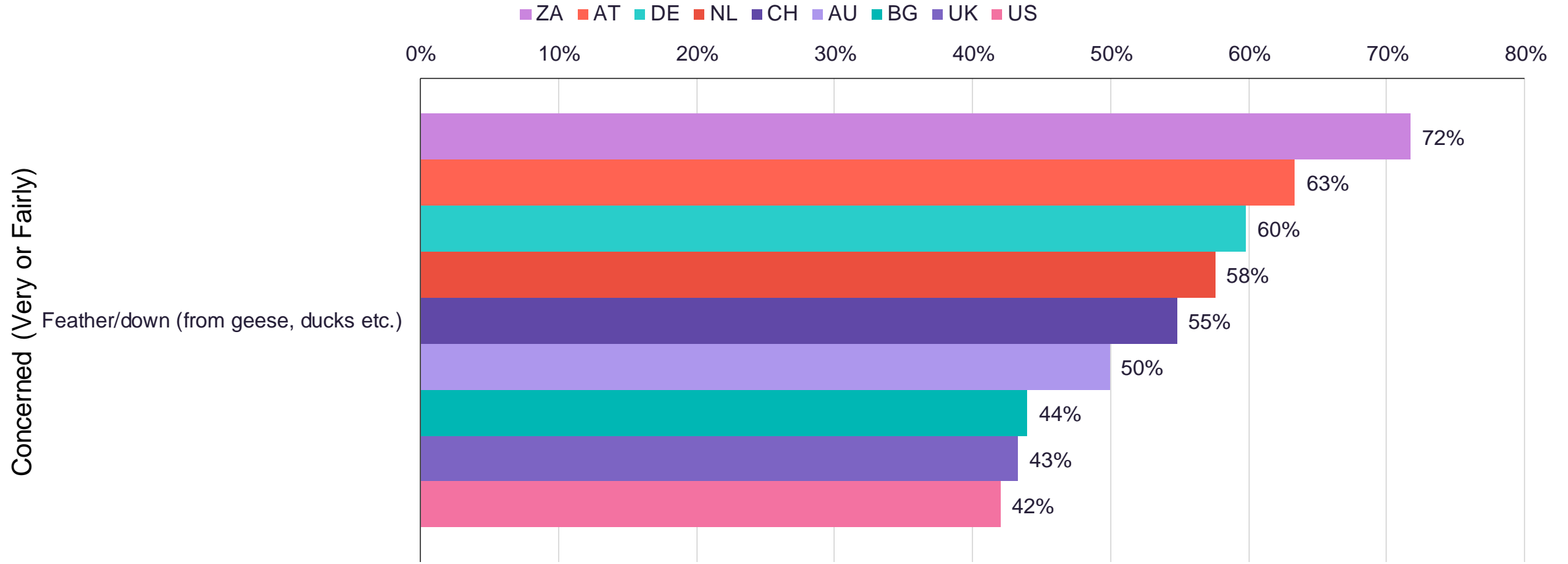
D. Concern levels of exotic leather

% Concerned (Very or Fairly) about the welfare and treatment of animals in the exotic leather category of the fashion industry, ranked by country



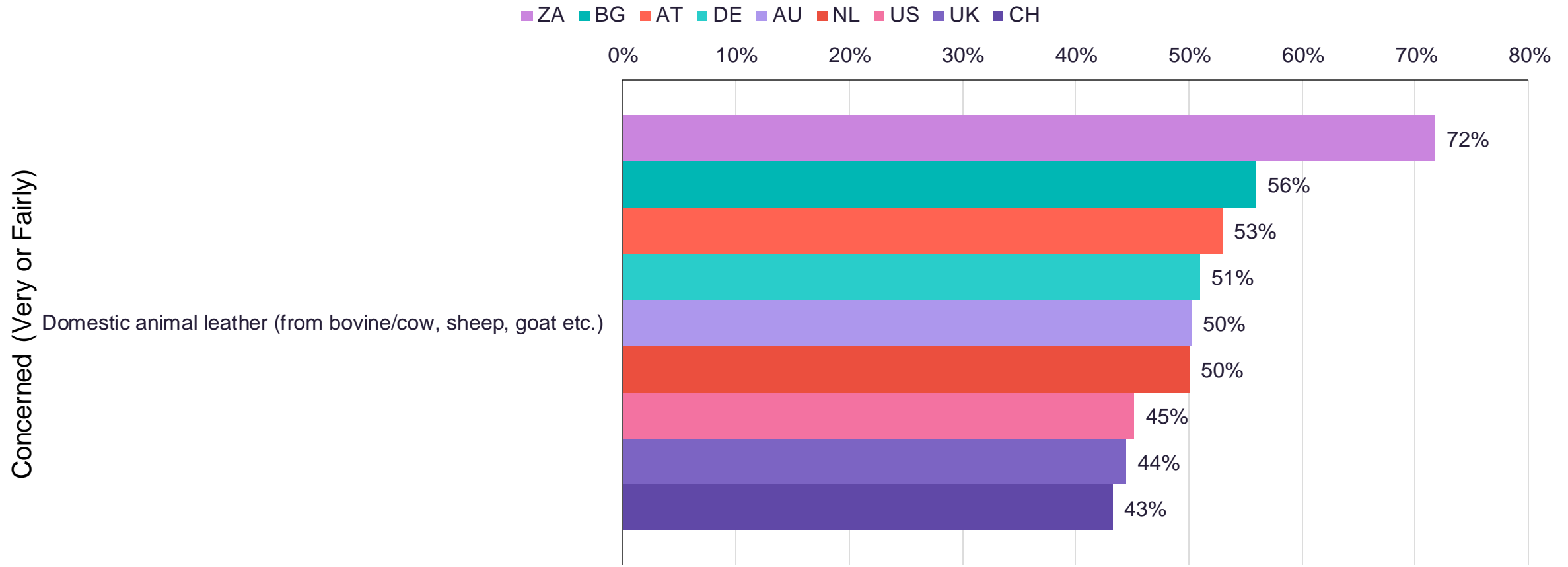
D. Concern levels of feather/ down

% Concerned (Very or Fairly) about the welfare and treatment of animals in the feather/ down category of the fashion industry, ranked by country



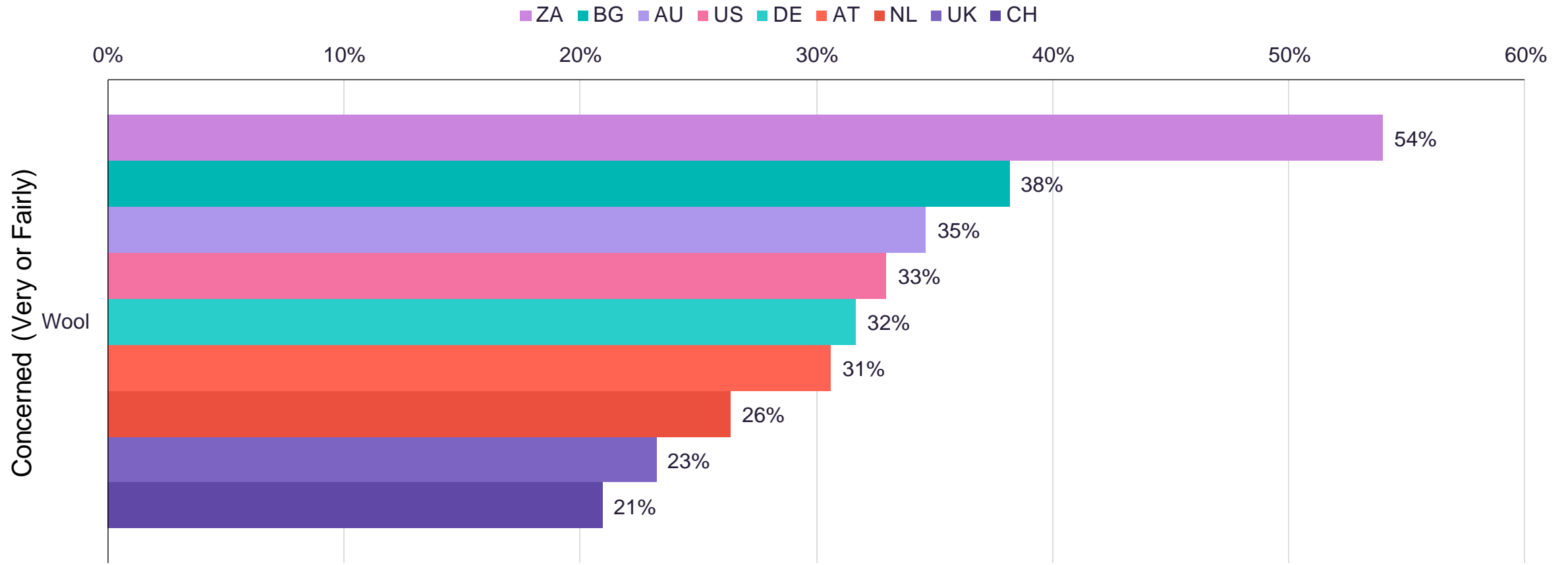
D. Concern levels of domestic animal leather

% Concerned (Very or Fairly) about the welfare and treatment of animals in the domestic animal leather category of the fashion industry, ranked by country



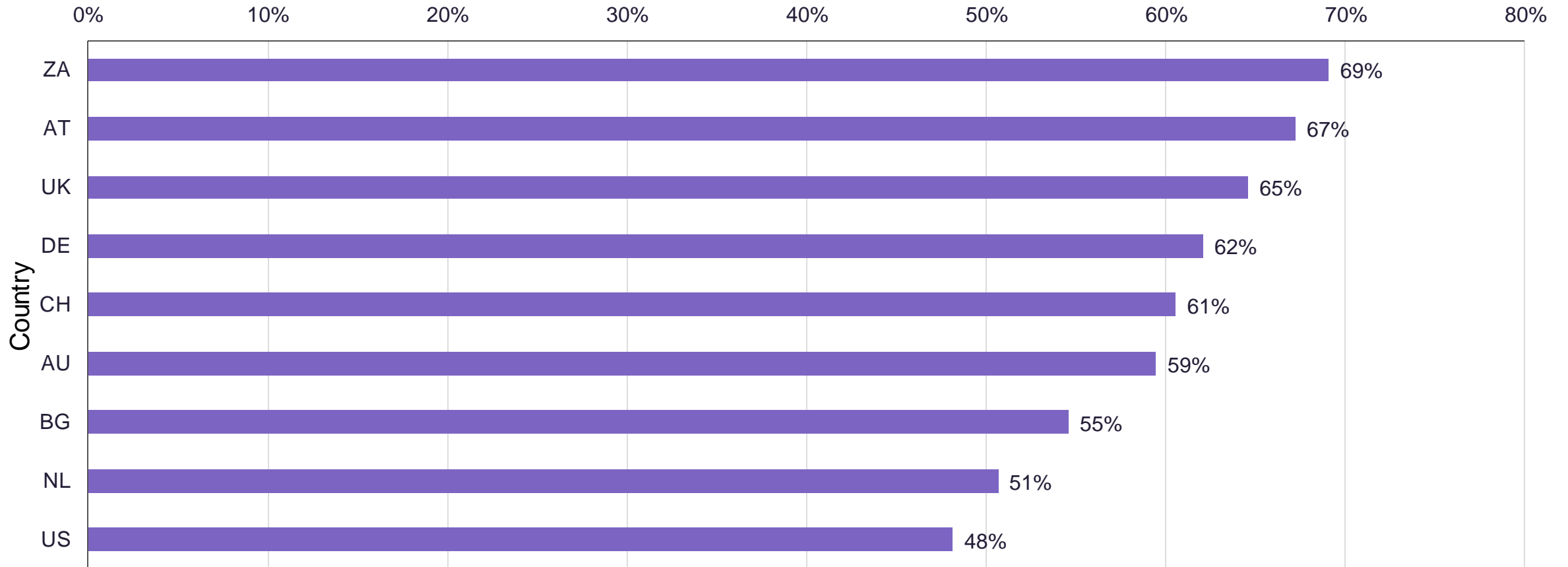
D. Concern levels of wool

% Concerned (Very or Fairly) about the welfare and treatment of animals in the wool category of the fashion industry, ranked by country



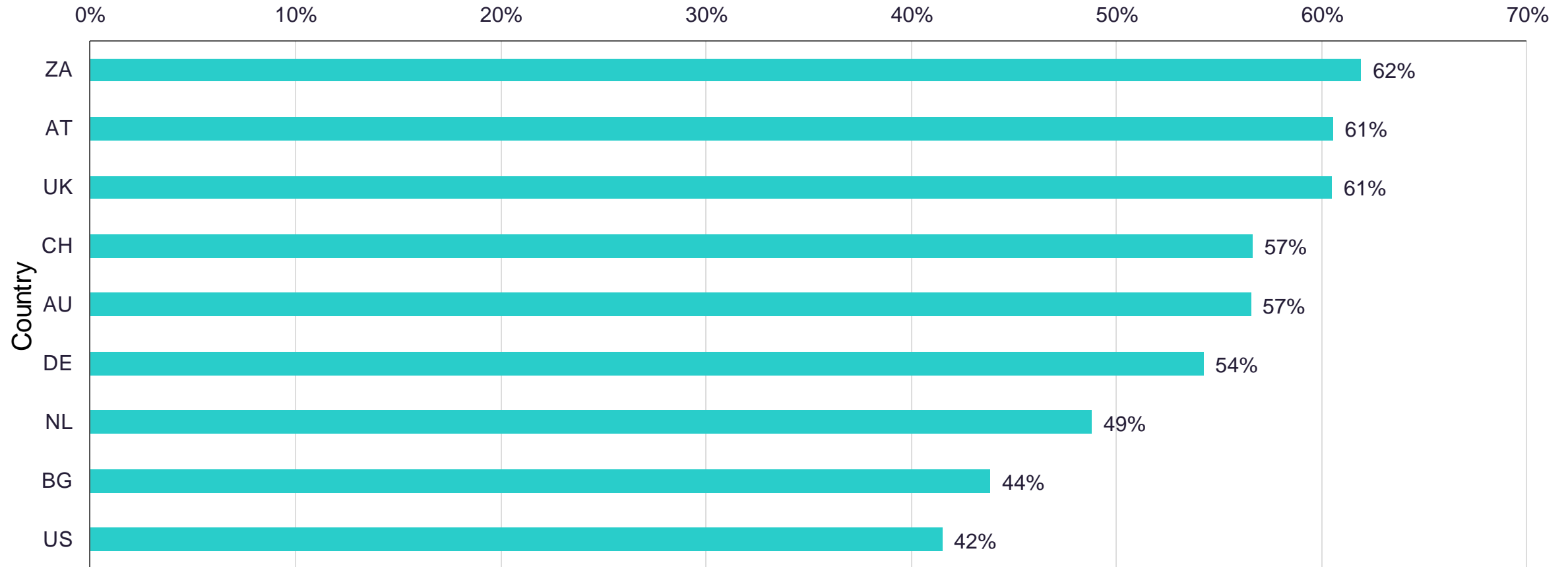
G. Fashion brands should be responsible for assuring animal welfare standards are upheld throughout their supply chains

% selected, ranked by country



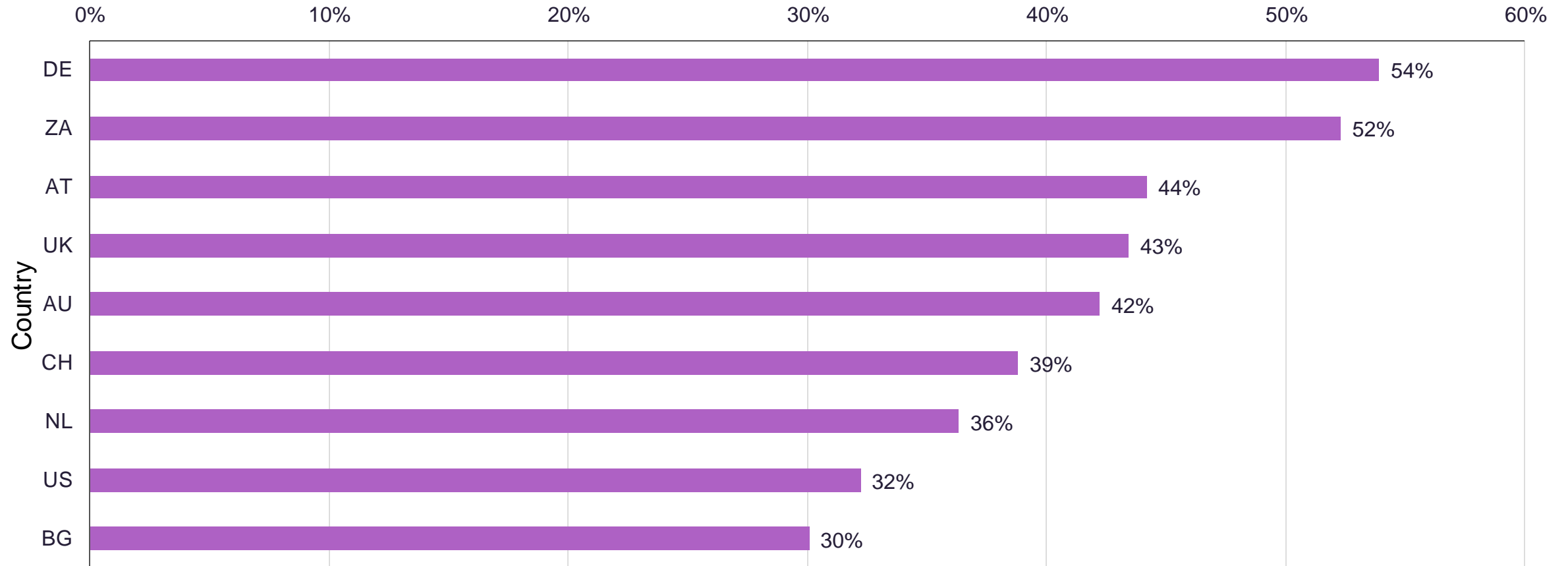
G. Fashion brands should be transparent about their standards when it comes to animal welfare

% selected, ranked by country



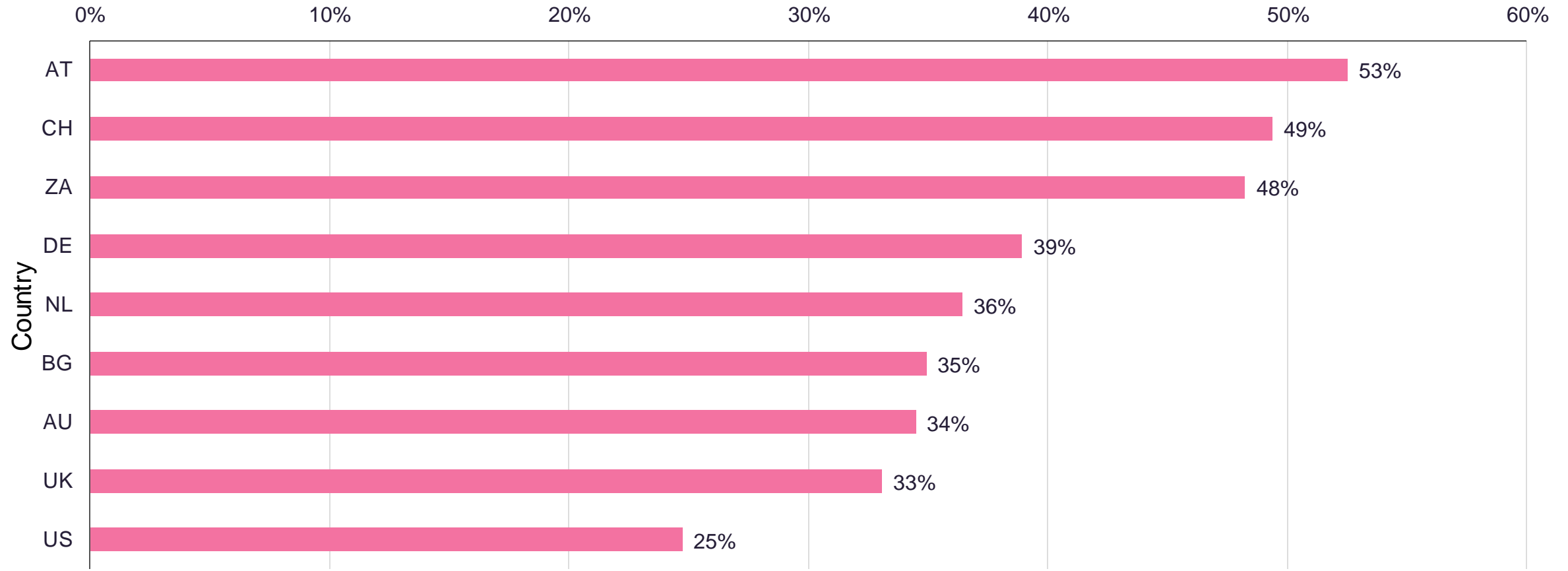
G. Brands need to better care for the animals in their supply chain

% selected, ranked by country



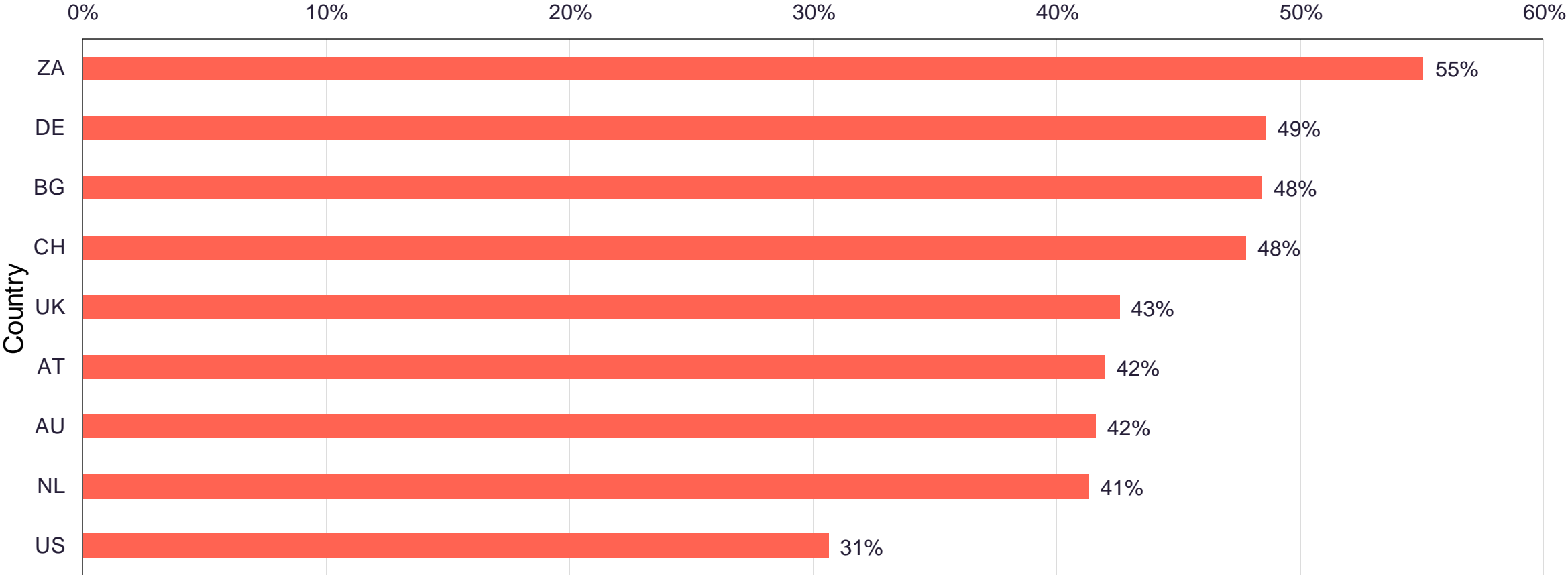
G. I will choose one fashion brand over another if they prioritise animal welfare

% selected, ranked by country



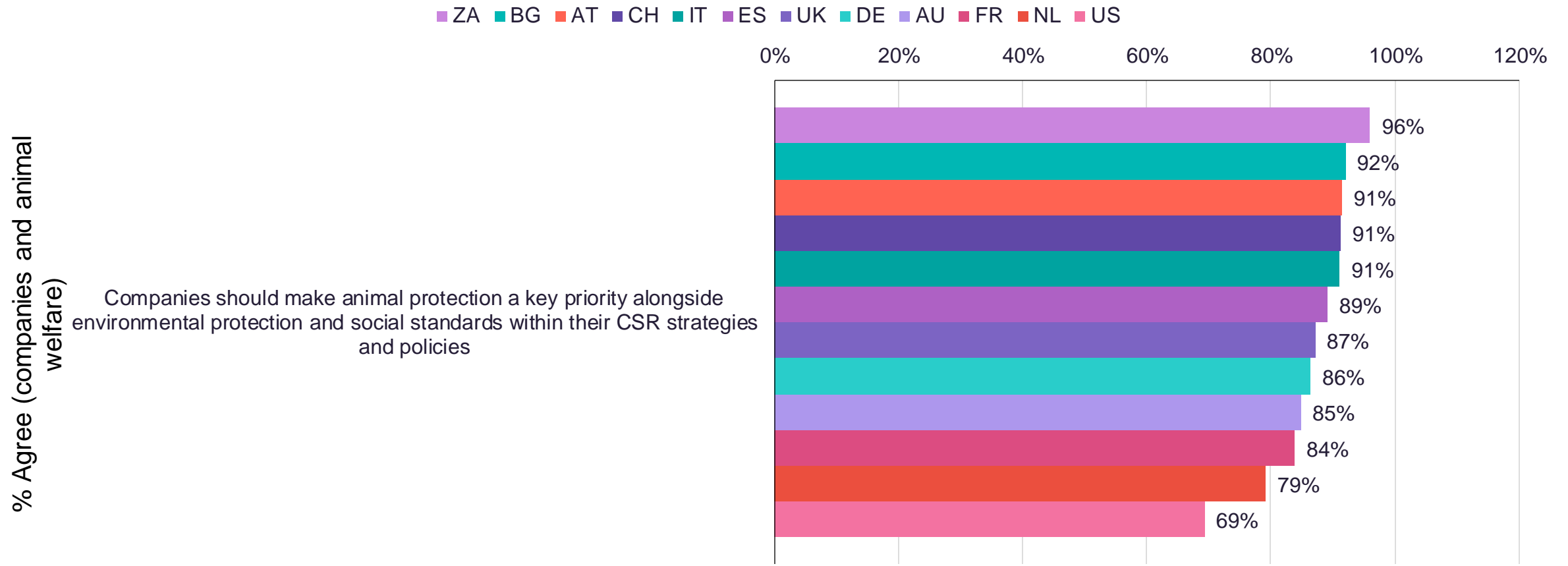
G. I am concerned about animal welfare in the fashion industry in general

% selected, ranked by country



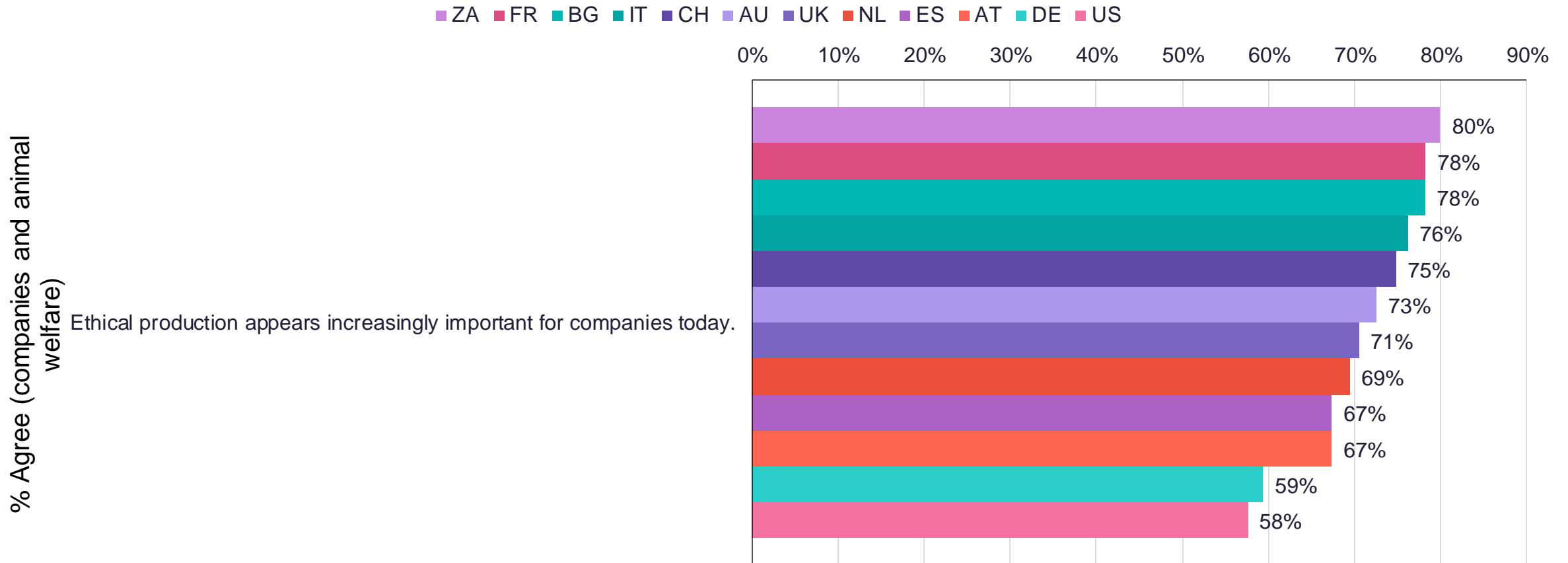
E. Companies should make animal protection a key priority alongside environmental/ social protections

% Agree, ranked by country



E. Ethical production appears increasingly important for companies today

% Agree, ranked by country

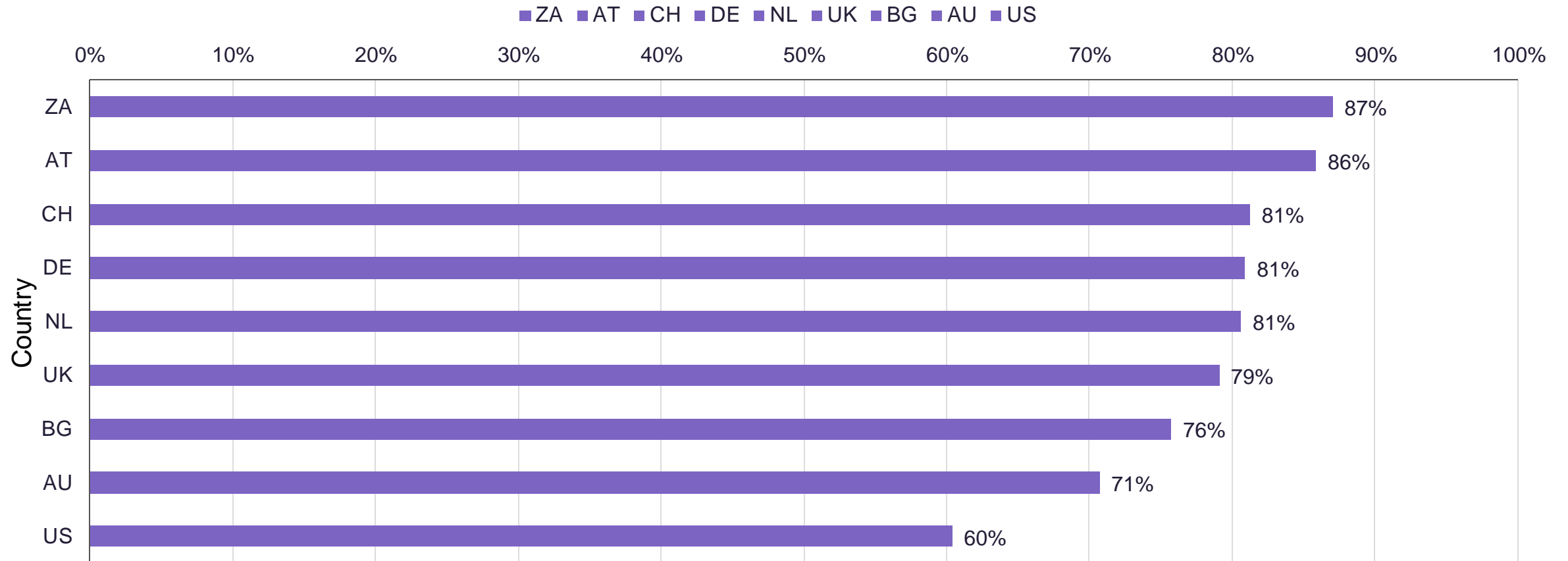


% Agree (companies and animal welfare)

Ethical production appears increasingly important for companies today.

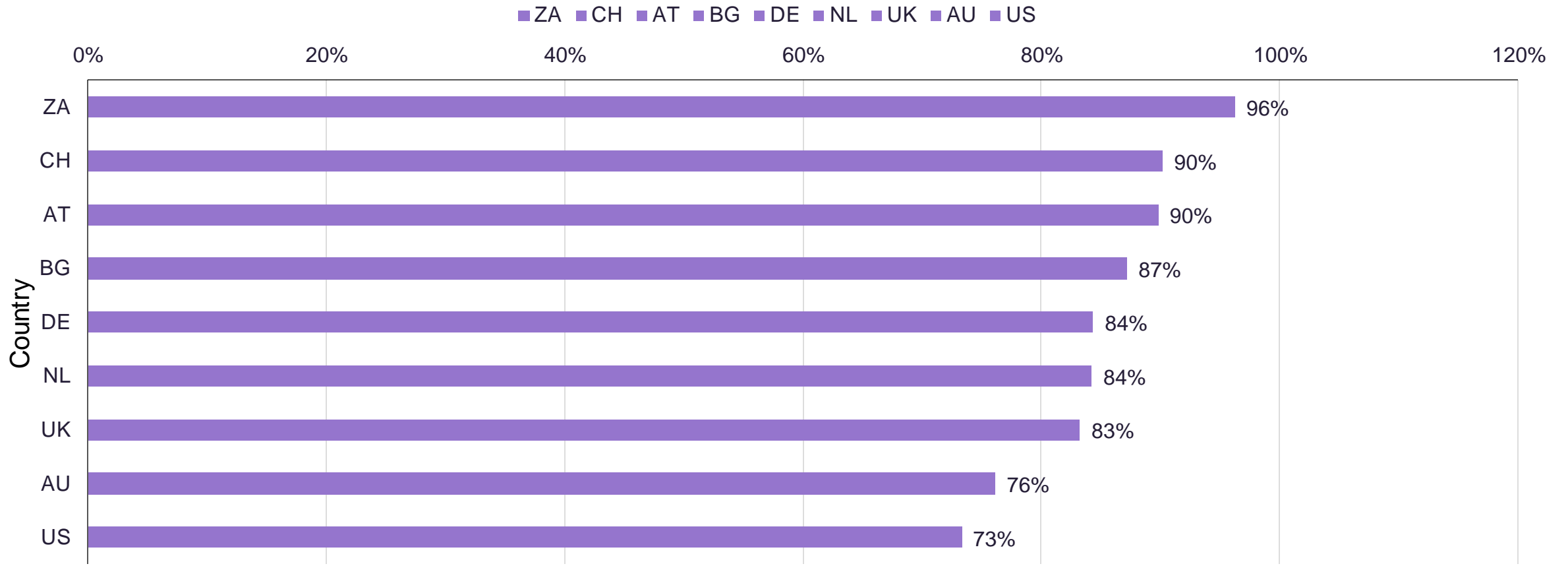
B. Retailers should phase out use of mulesed wool

% Agree, ranked by country



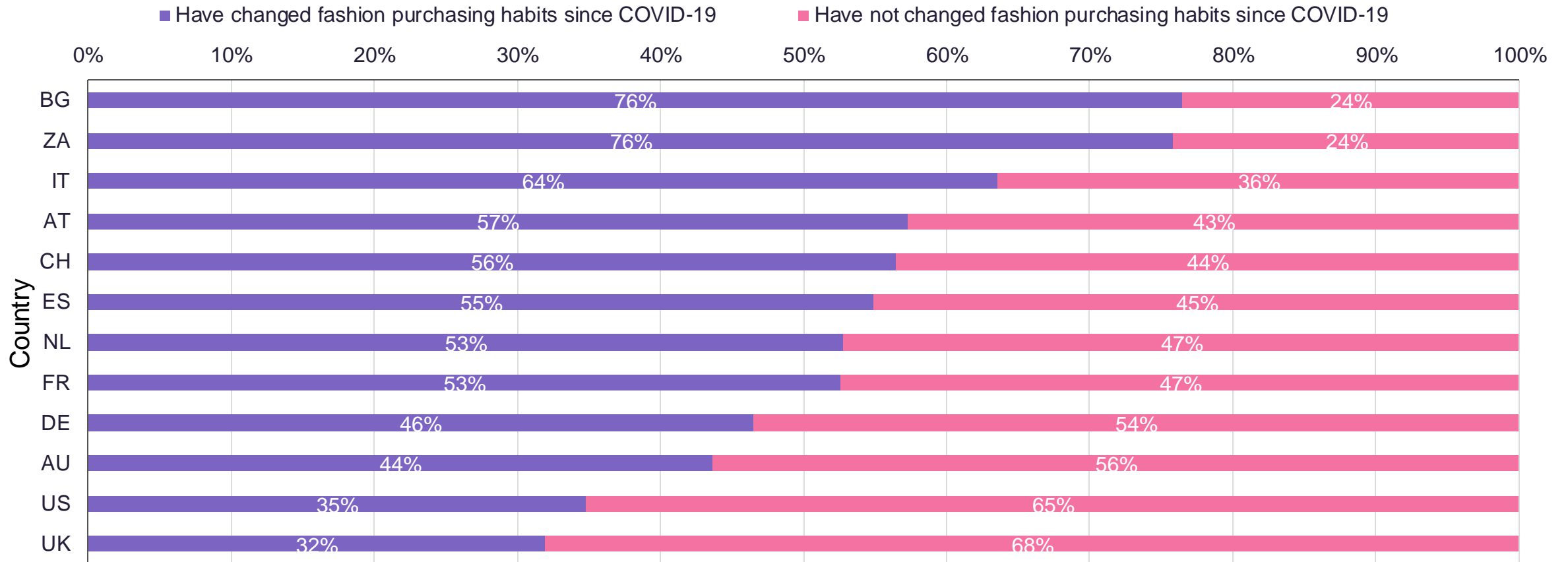
C. Kangaroo welfare concern level

% Concerned (very or fairly), ranked by country



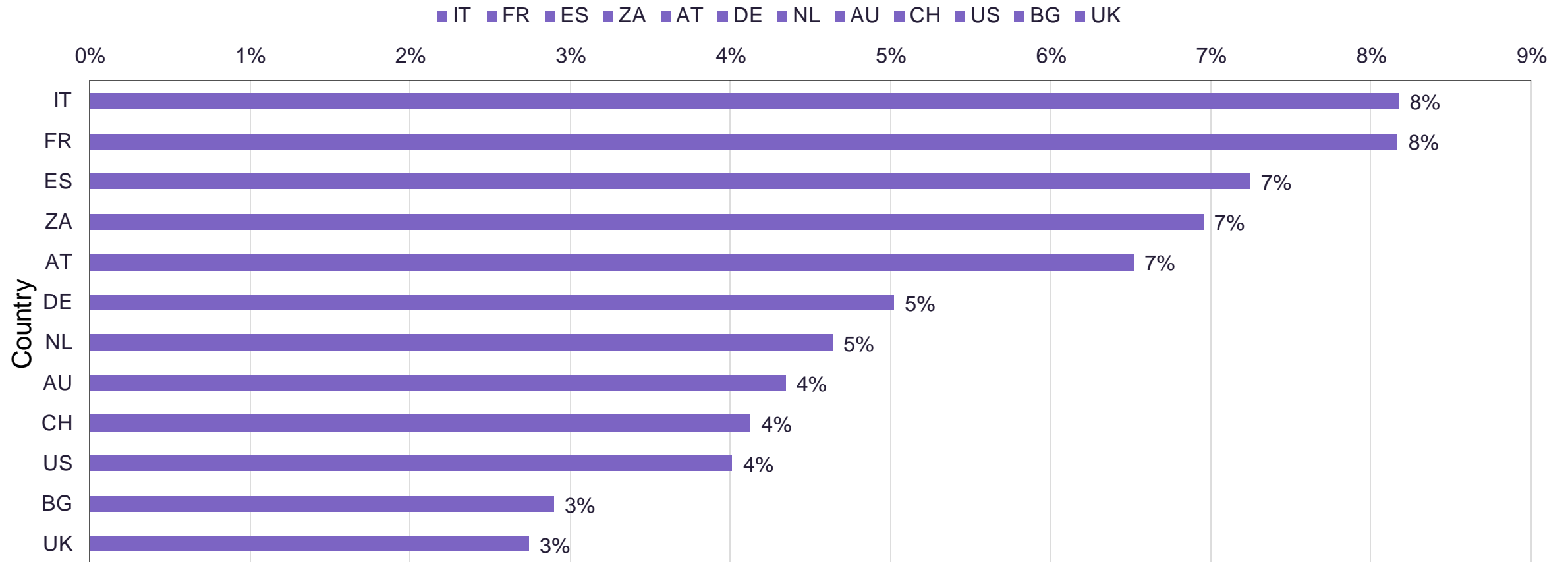
F. Change to fashion purchasing habits since COVID-19 (recoded)

% Have changed vs not changed fashion purchasing habits since COVID-19 reached their country, ranked by country



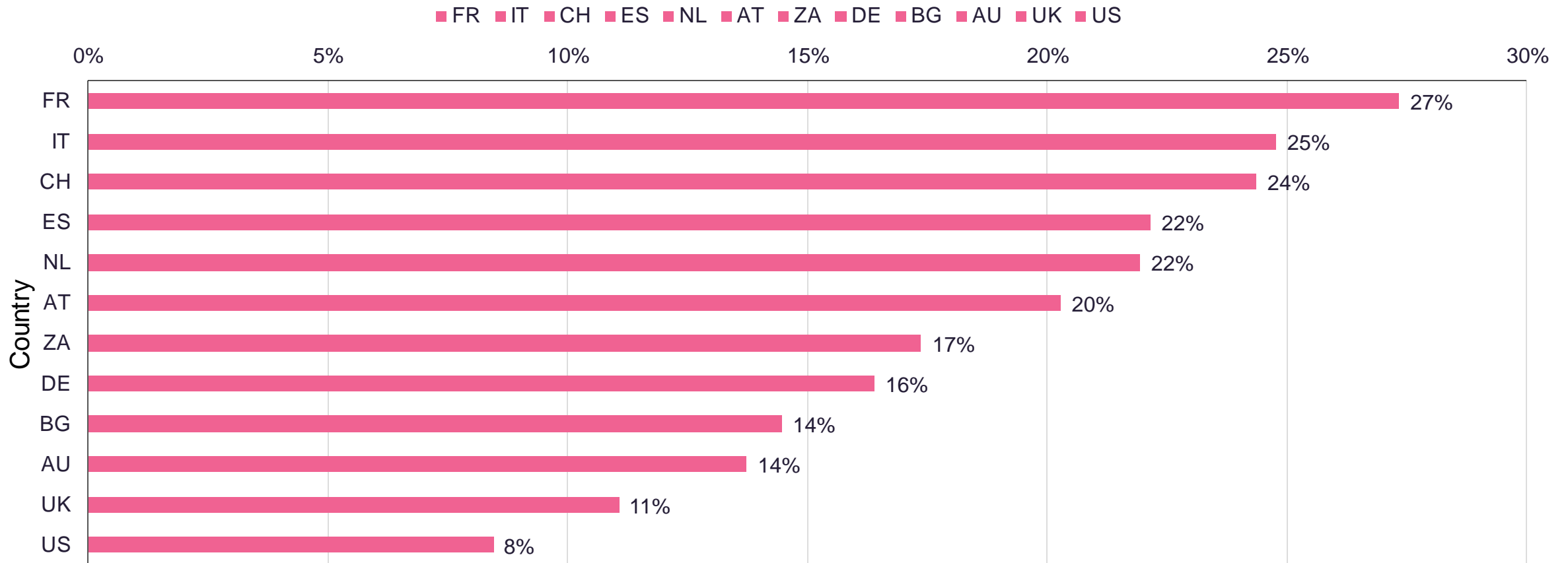
F. I now seek out higher quality/ more durable fashion items, regardless of their sustainability/ animal welfare credentials

% selected, ranked by country



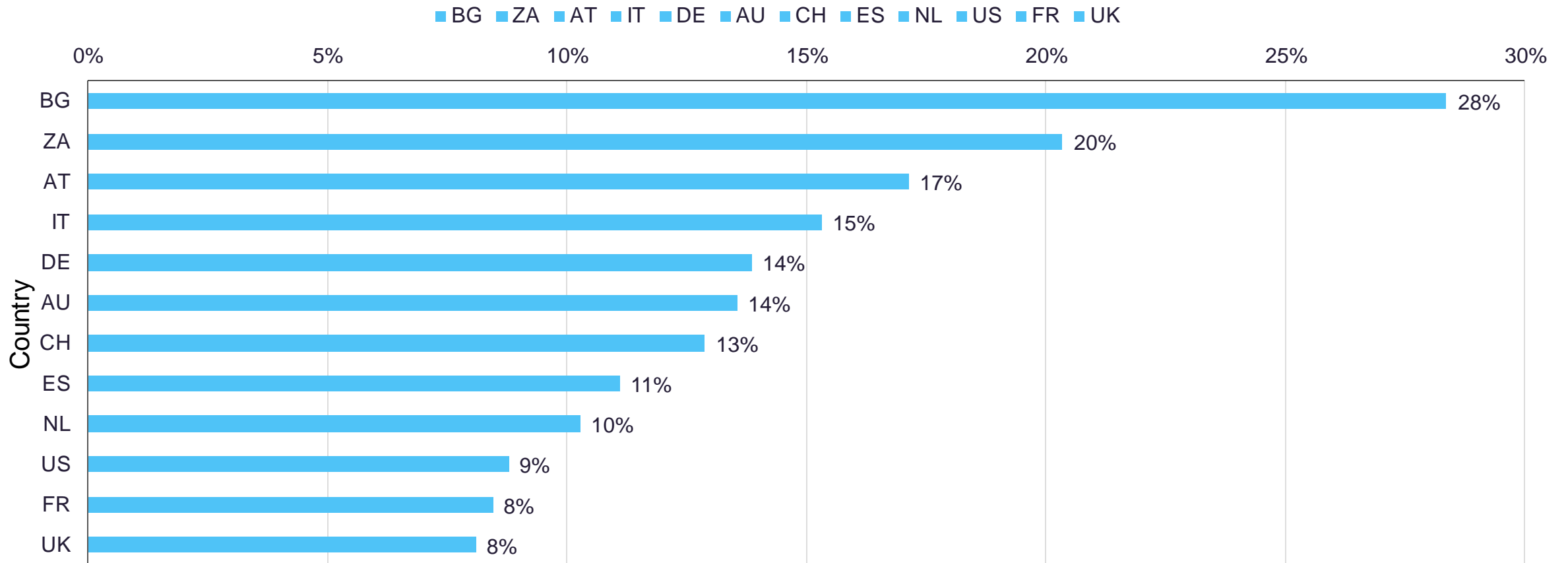
F. I now seek out higher quality/ more durable fashion items that are also sustainable and have higher animal welfare credentials

% selected, ranked by country



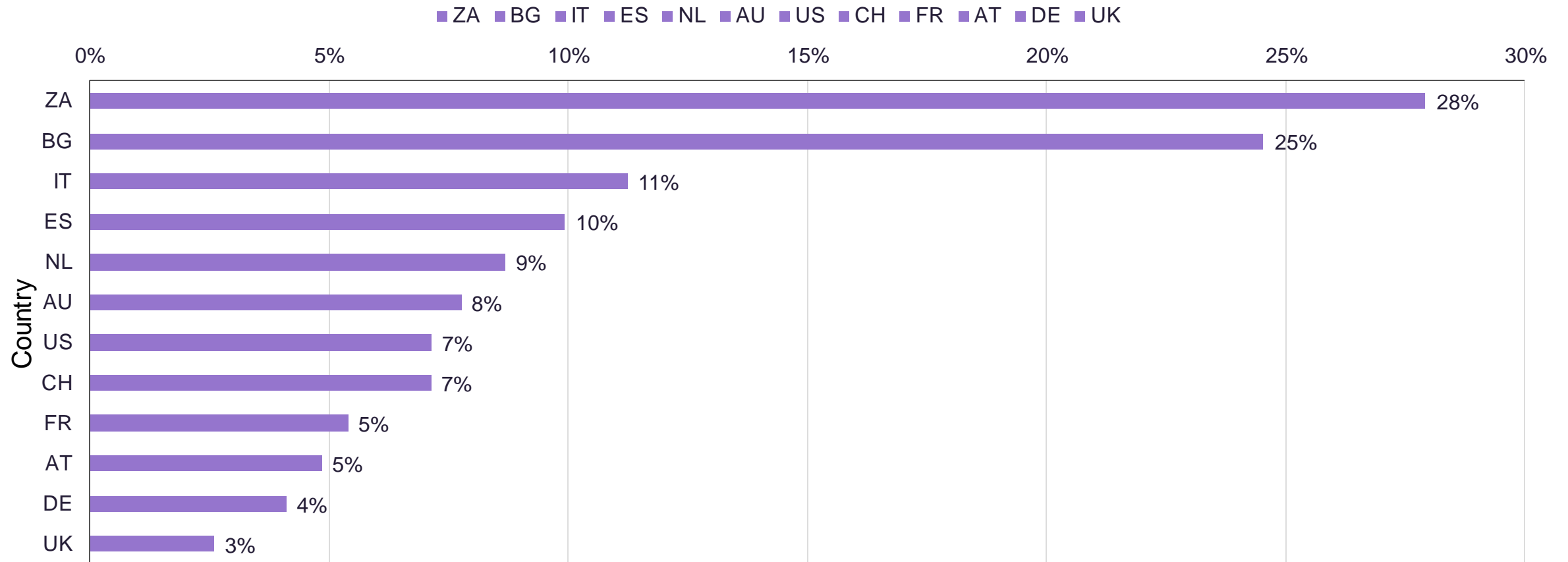
F. I have decided to now avoid animal-based fashion products all together

% selected, ranked by country



F. I now choose cheap / fast fashion items

% selected, ranked by country



Thank you for your attention!

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