



## **Sustainability Survey Report of Key Findings**

*May 2022*

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## Survey Methodology

Morning Consult conducted n=11,498 online interviews among General Population adults ages 18-55 and Active/Casual Lifestyle Brand Purchasers ages 18-55 in the US, UK, Italy, Germany, France, and China from April 15 – 25, 2022. Sampling included approximately n=1,000 General Population adults in each market, and an oversample of Active/Casual Lifestyle Brand Purchasers in each market.

General Population adults and Active/Casual Lifestyle Brand Purchasers were separately sampled and weighted to be demographically representative for their age groups according to published population statistics for age, gender, region, education, race, and income in the US, and age, gender, region, and education in the UK, Italy, Germany, France, and China.

Active/Casual Lifestyle Brand Purchasers are defined as those who purchased at least one of the following types of brands within the past 6 months: Athletic or activewear clothing or footwear brands; casual lifestyle clothing or footwear brands; outdoor clothing or footwear brands (i.e., for hiking, skiing, etc.); or sporting goods or outdoor recreation equipment brands.

Market	Gen Pop Survey N	Gen Pop Margin of Error	ACLBP Survey N	ACLBP Margin of Error
US	N=1,000	+/- 3%	N=4,679	+/- 1%
UK	N=1,000	+/- 3%	N=1,099	+/- 3%
Italy	N=1,000	+/- 3%	N=1,074	+/- 3%
Germany	N=1,000	+/- 3%	N=1,036	+/- 3%
France	N=1,000	+/- 3%	N=999	+/- 3%
China	N=1,000	+/- 3%	N=1,117	+/- 3%

The margins of error provided above apply for the full sample size of the audience; margins of error are larger for any demographic subgroups.

Wave-over-wave comparisons and tracking are comparing results to the 2021 iteration of this survey, conducted in the same six markets from April 16 – 25, 2021. This survey used an identical methodology and had extremely similar sample sizes and questions. Items asked in this survey but not the previous one are market in footnotes. All statistical significance testing is conducted at the 95% confidence level. For any questions about methodology or the 2021 survey, please contact the Stifel or Morning Consult teams.

## Key Survey Findings

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**In the United States, most active/casual lifestyle brand consumers agree its important for brands to focus on improving their sustainability practices, and many regularly consider and value sustainability when they shop these categories. However, emphasis on sustainability has fallen somewhat in 2022 as US consumers deal with rising prices from inflation.**

- Four in five US consumers say its important for brands to operate sustainably, including over one in three (36%) who say its “very important,” though this has ticked downward since April 2021.
  - Ethical business practices are especially top-of-mind to US consumers, with over half (57%) saying they are “very important” for brands to prioritize. When asked to rank individual sustainability priorities for brands, US consumers most frequently prioritize ethical business priorities like giving workers fair pay and benefits, paying their fair share in taxes, protecting international worker health and safety, and creating more domestic jobs.
  - Large majorities also agree that it’s important for businesses to be environmentally and socially sustainable, though this also has fallen slightly YoY.
- Willingness to pay more for all types of brand attributes, including sustainability, has significantly fallen as consumers grapple with higher prices.
  - About three in ten (31%) still say that they prioritize sustainability highly when shopping active/casual lifestyle brands. However, consumers also say they are prioritizing value and low prices more, and style/design, innovation, and brand less.
  - Two in five (41%) say that companies have become more profit-focused in over the past year, a significant increase from 2021. In contrast, the share of consumers saying companies are more focused on sustainability issues is declining.
- But even if they can’t spend as much, US consumers are still often looking for information about brands’ sustainability (56%) and considering sustainability when choosing between brands (71%).’

**Globally, a large share of consumers across markets prioritize sustainability, though relative preference does differ by market.**

- Across all markets, at least four in five active/casual lifestyle brand purchasers say its important that brands operate with environmental sustainability, social sustainability, and ethical business practices.
- Chinese consumers are placing a growing importance on sustainability. Of note, Chinese consumers are more likely to call for brands to achieve carbon neutrality, prioritize recycling, protect human rights in the global supply chain, and give workers fair pay and benefits than this time last year.
- Italian and German consumers are the most likely to pay more for brands with leading sustainability practices (29% each). These rates have held steady since last year – meanwhile, consumers in the US, UK, France, and China are all less likely to pay a premium for sustainability versus last year, alongside other falling priorities for premium spending.
- Despite lower willingness to pay a premium, French consumers are still most likely of all markets to prioritize sustainability when shopping active/casual lifestyle brands (59%) and look for information often about a brand’s sustainability (61%).

## S **US Key Findings**

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# About four in five Americans say its important for brands to focus on operating sustainably. However, sustainability falls behind quality, customer service, and lower prices in prioritization for brand focus.

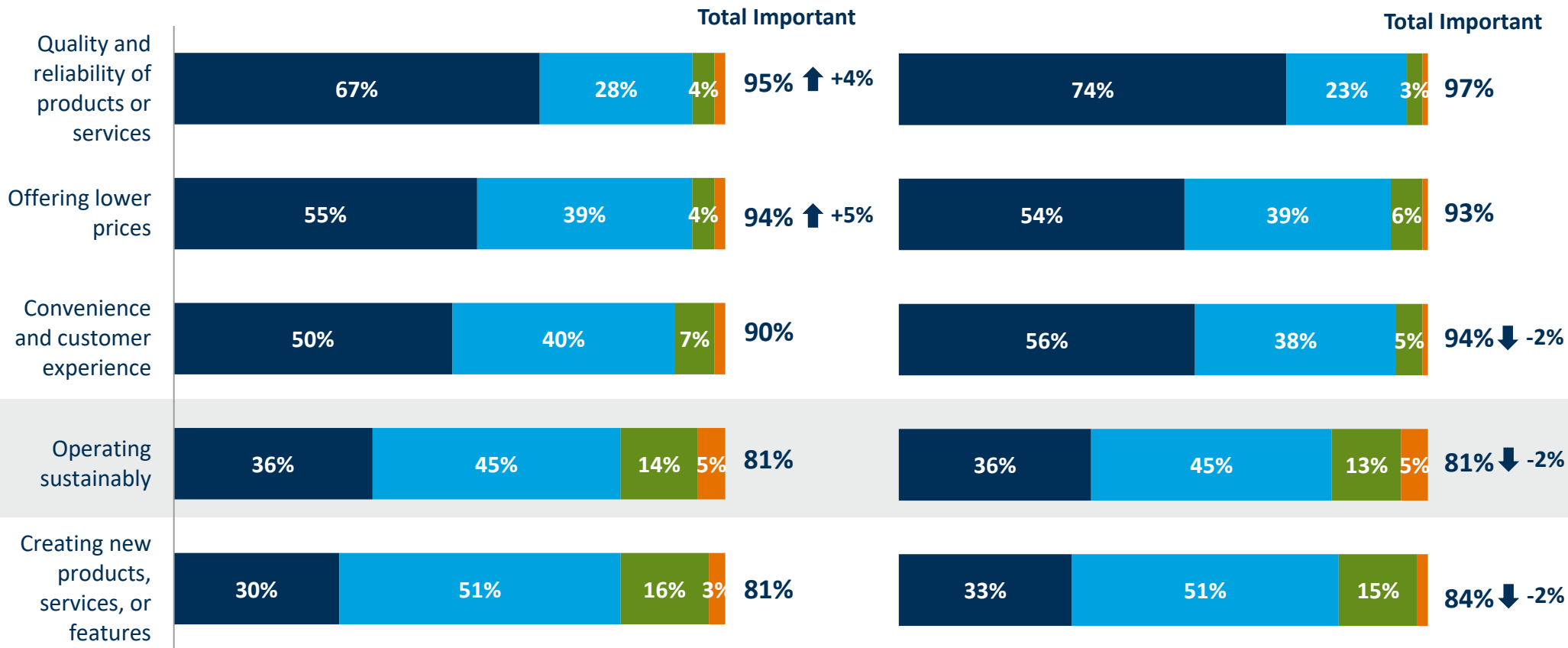
Broadly, how important is it to you that brands focus on the following? Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)"

## BRAND PRIORITIES

### GENERAL POPULATION

### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

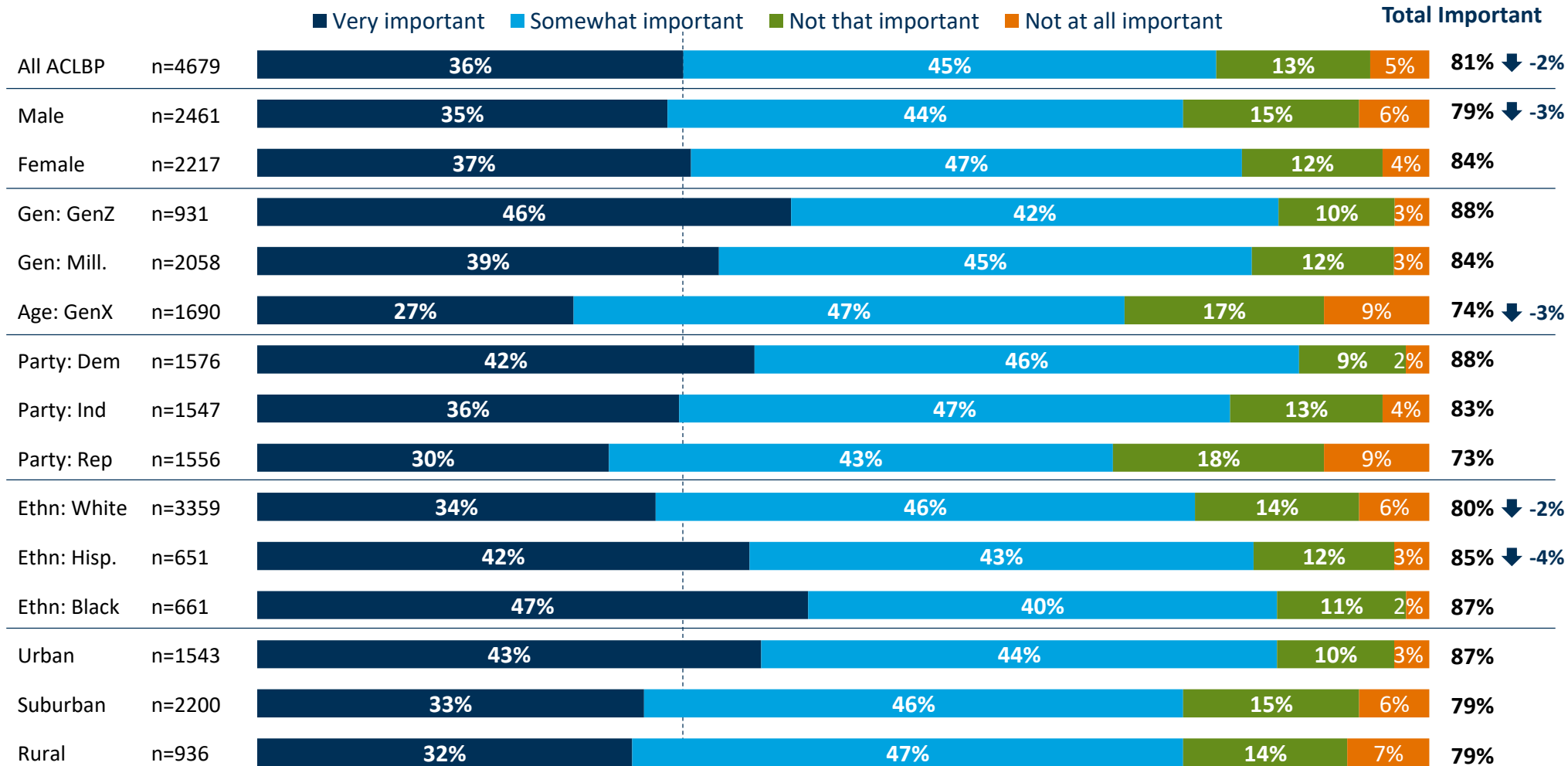
■ Very important   ■ Somewhat important   ■ Not that important   ■ Not at all important



# Younger, Democrats, Black, Hispanic, and urban ACLBP consumers are all more likely to say its very important for brands to focus on operating sustainably.

Broadly, how important is it to you that brands focus on the following? Showing % "Operating Sustainably" Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)" Among Active/Casual Lifestyle Brand Purchasers.

## BRAND PRIORITIES

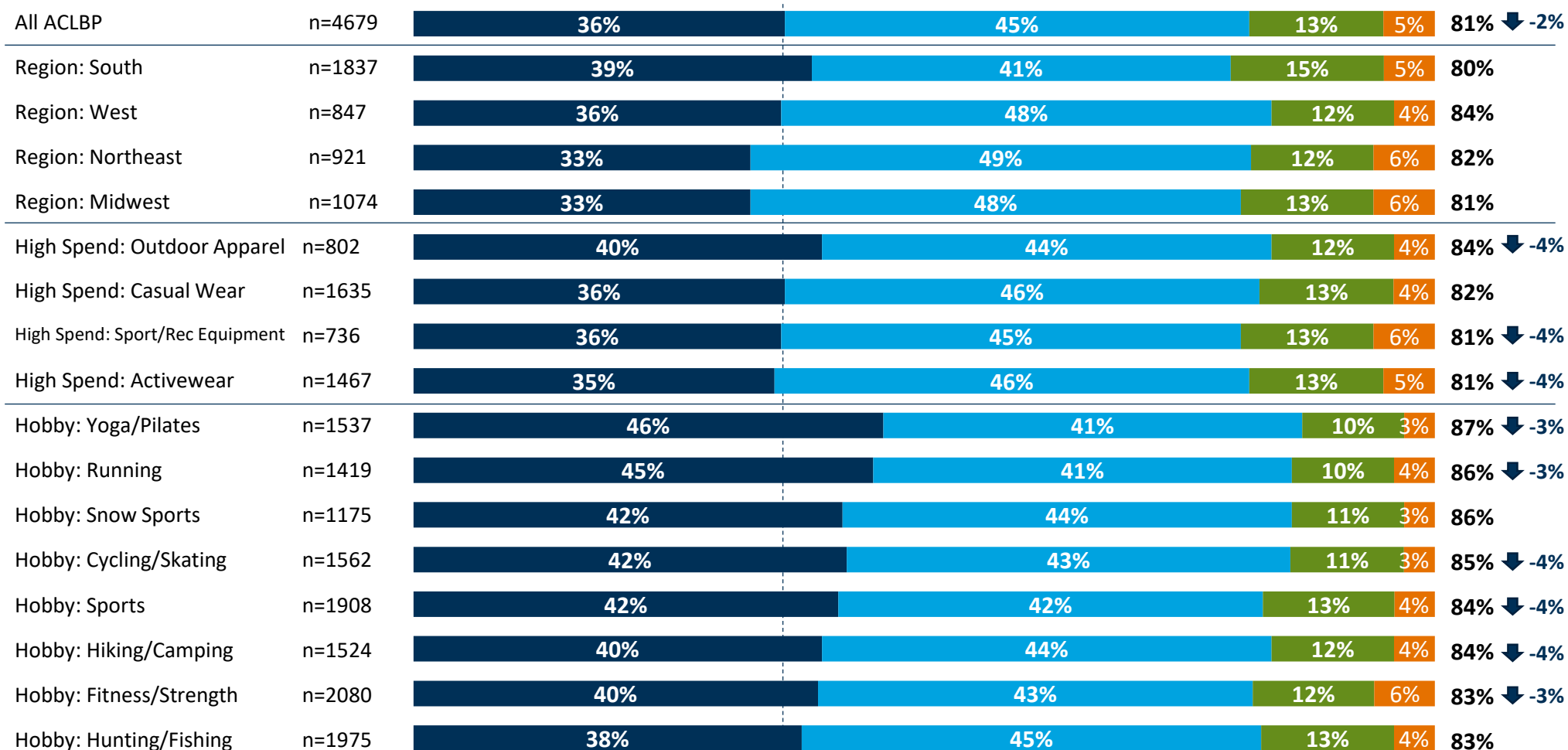


# Other demographic groups that prioritize brands operating sustainably are those living in the South, higher spenders on outdoor apparel, and those who enjoy more active hobbies, including yoga and running.

Broadly, how important is it to you that brands focus on the following? Showing % "Operating Sustainably" Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)" Among Active/Casual Lifestyle Brand Purchasers.

## BRAND PRIORITIES

■ Very important ■ Somewhat important ■ Not that important ■ Not at all important **Total Important**



# Large majorities of ACLBP consumers agree that it's important that brands operate with all three pillars of stability, with ethical business practices most likely to be called "very important." However, importance of environmental and social sustainability ticked downward from last year.

How important is it to you that brands operate [in an environmentally sustainable way / with ethical business practices / in a socially sustainable way]?

## IMPORTANCE OF SUSTAINABILITY

### Environmentally Sustainable

*Respondents saw:* For the purposes of this survey, **environmental sustainability** refers to environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc.

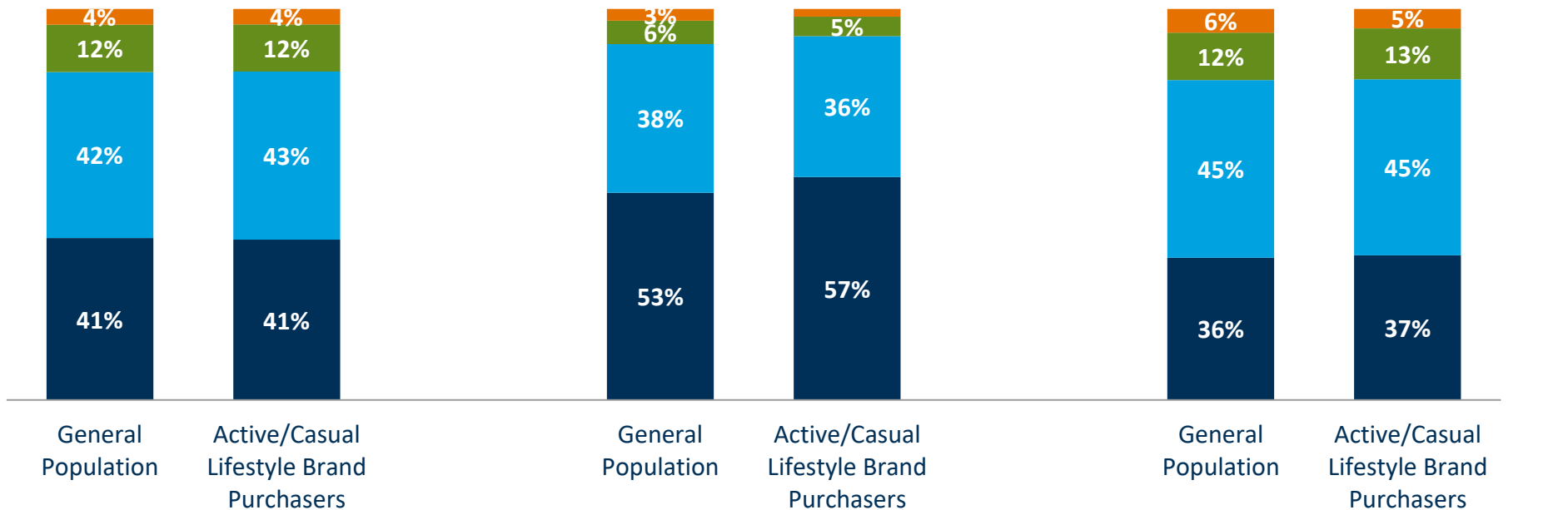
### Ethical Business Practices

*Respondents saw:* For the purposes of this survey, **ethical business practices** refers to fair and principled business operations, such as fair labor standards, paying employees fair wages and benefits, international sourcing from places that treat workers fairly, fair trade, promoting worker health, safety, and human rights, etc.

### Socially Sustainable

*Respondents saw:* For the purposes of this survey, **social sustainability** refers to good community stewardship, such as promoting diversity and inclusion efforts, community engagement, local investment and development, philanthropy and charity, volunteerism, helping traditionally unempowered or underserved groups, etc.

■ Very important    ■ Somewhat important    ■ Not that important    ■ Not at all important



**Total Important**    **83%**    **84%** ↓ -4%    **91%**    **93%**    **81%**    **82%** ↓ -4%



# Ethical Business priorities like fair pay, paying their fair share of taxes, and work/life balance remain the top brand sustainability priorities. However, nearly all brand attributes, particularly environmental and social priorities, score significantly lower this wave.

How important is it to you that brands focus on the following? *Among Active/Casual Lifestyle Brand Purchasers.*

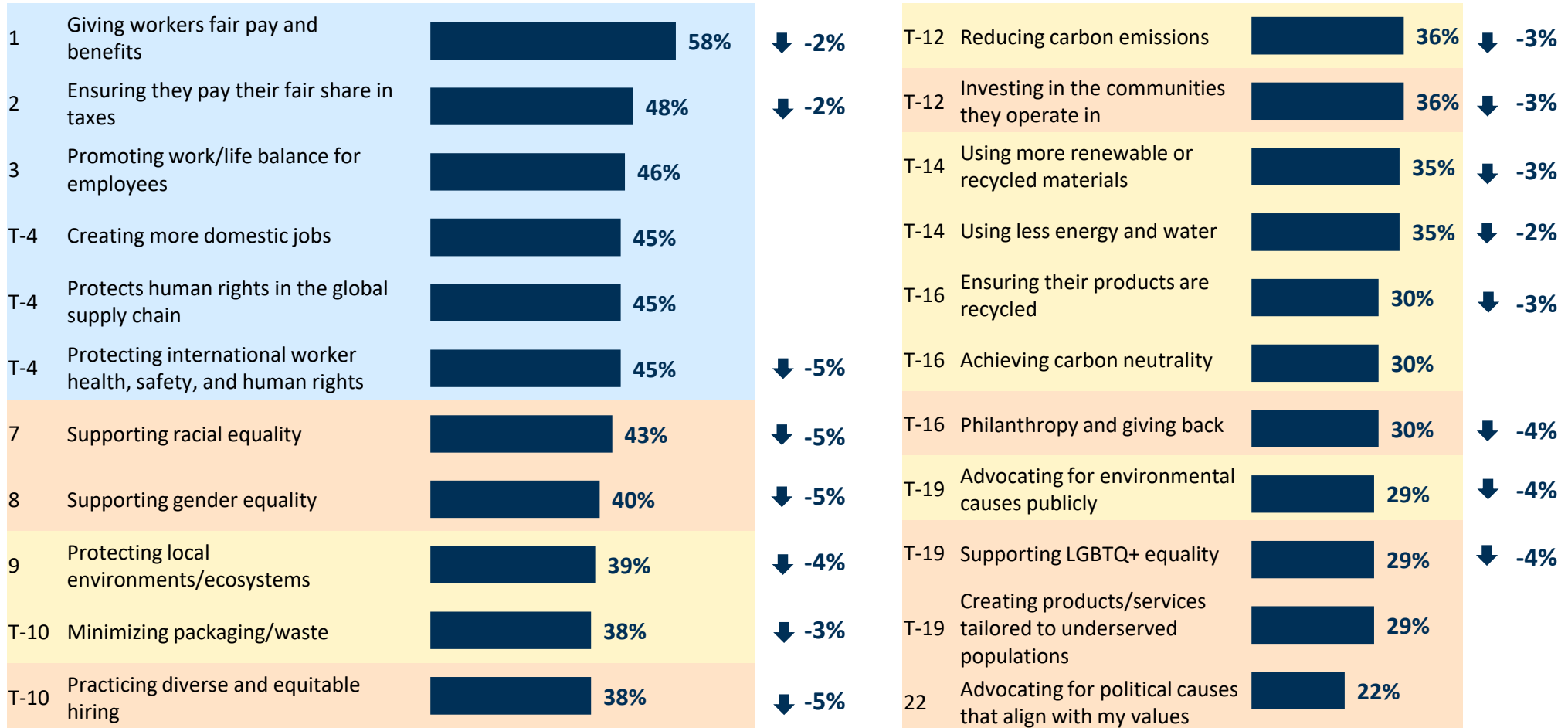
## SUSTAINABILITY PRIORITIES FOR BRANDS

Environmental Priorities

Ethical Business Priorities

Social Priorities

Showing % "Very Important"



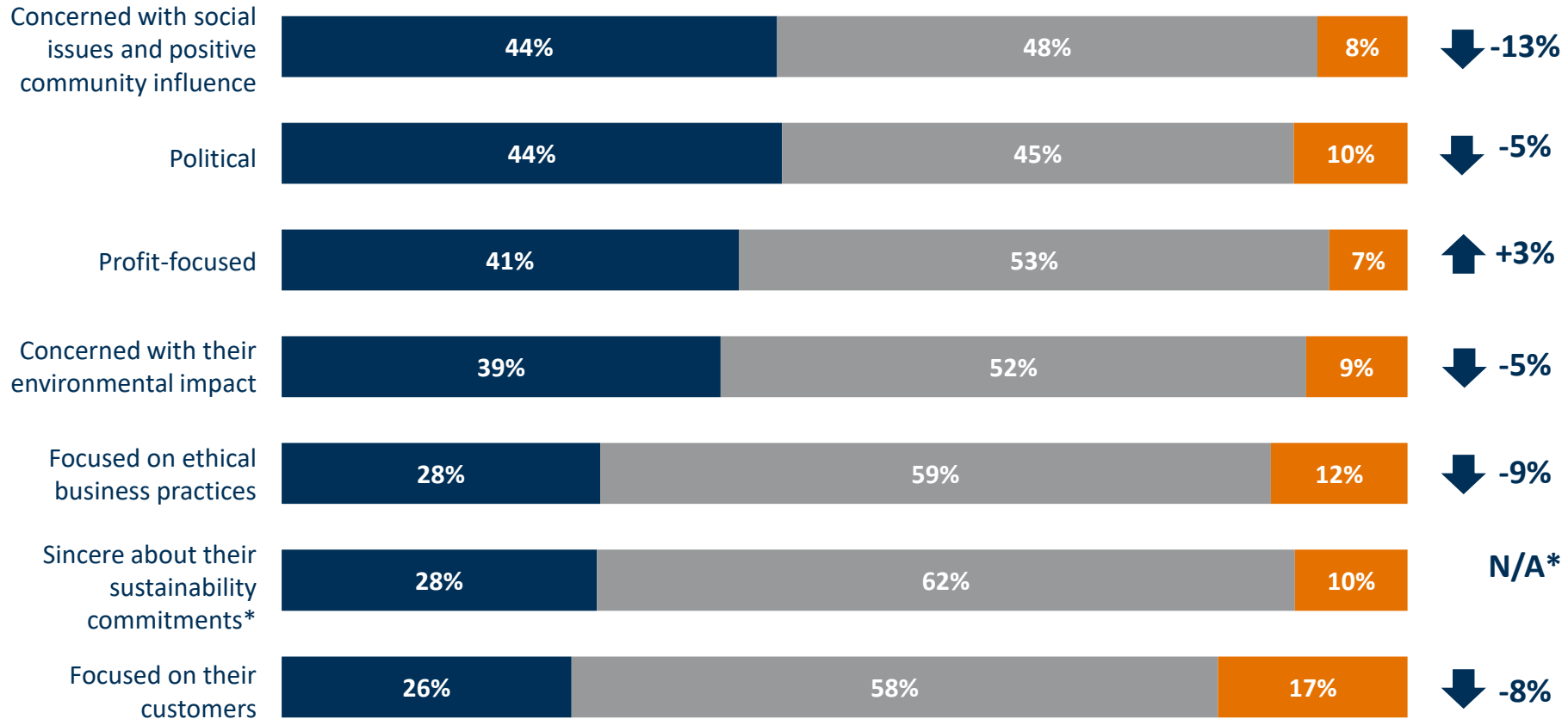
# Two in five say brands are becoming more concerned with social issues and environmental impact, while three in ten say they are more focused on ethical business practices. But versus last year, consumers say brands are becoming more profit-focused over other priorities.

Over the past year, have brands become more or less: *Among Active/Casual Lifestyle Brand Purchasers.*

## BRAND TRENDS OVER PAST YEAR

■ More    ■ About the same    ■ Less

YoY Change  
in % More



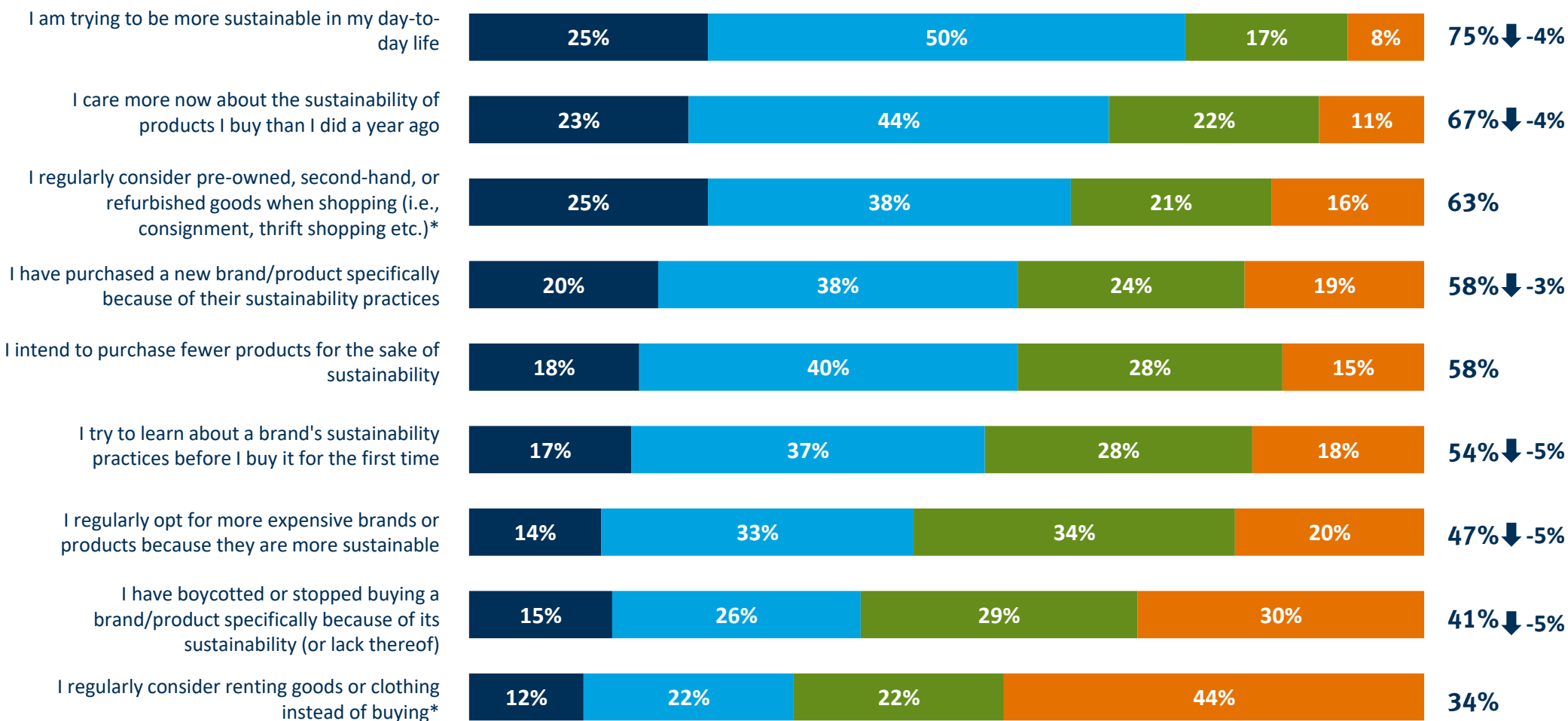
# Three-quarters of consumers are trying to be more sustainable in their day-to-day lives, and 67% care more than they did a year ago about sustainability. However, several sustainability actions are down as Americans face inflation and economic pessimism.

To what degree do you agree or disagree with the following statements? *Among Active/Casual Lifestyle Brand Purchasers.*

## CONSUMER SUSTAINABILITY ACTIONS

■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree

**Total Agree**

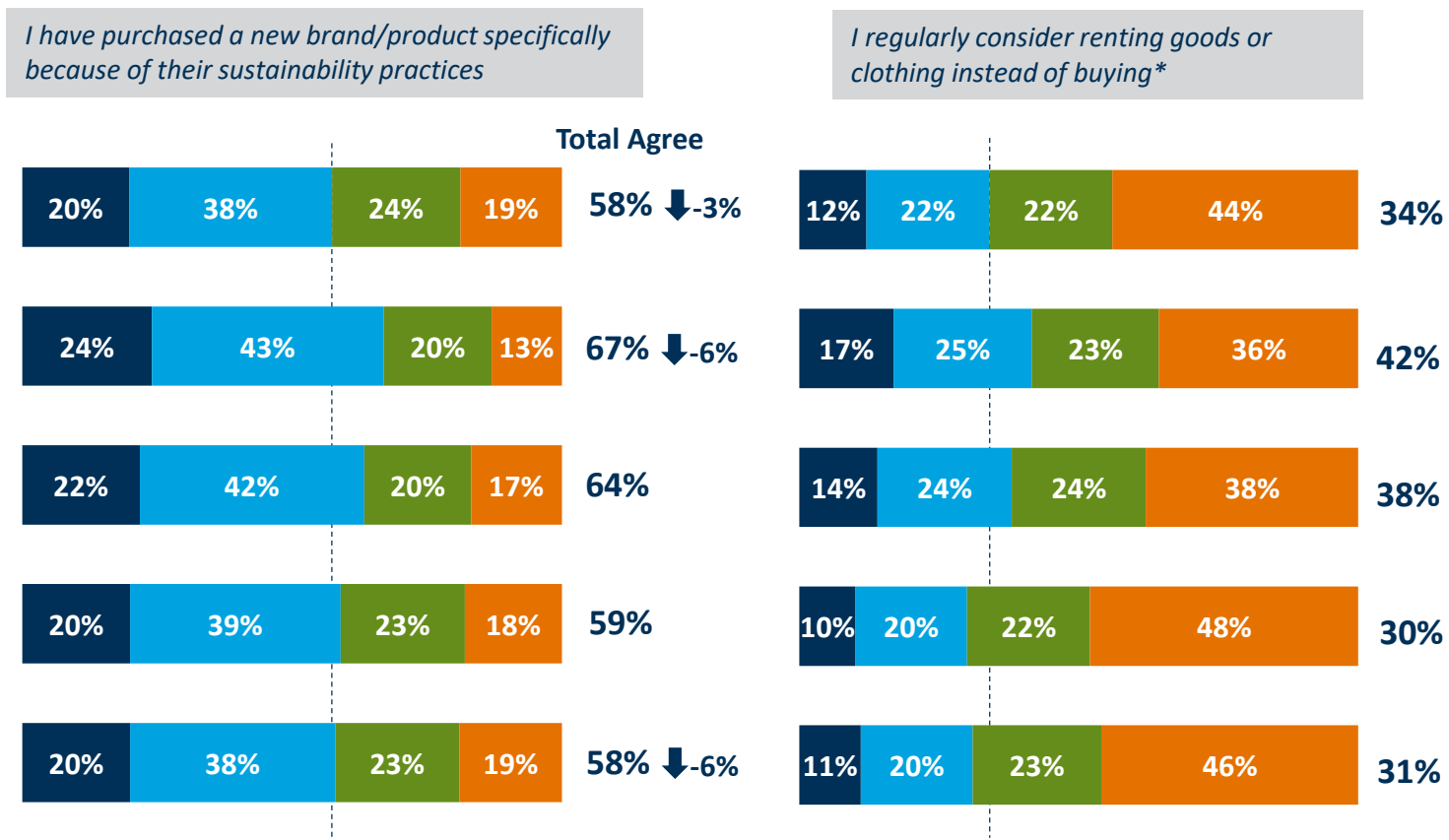


# Those who spend more on outdoor apparel and sporting/recreational equipment are more likely to purchase new brands based on their sustainability practices, and also more likely to consider renting over buying.

To what degree do you agree or disagree with the following statements? *Among Active/Casual Lifestyle Brand Purchasers.*

## CONSUMER SUSTAINABILITY ACTIONS

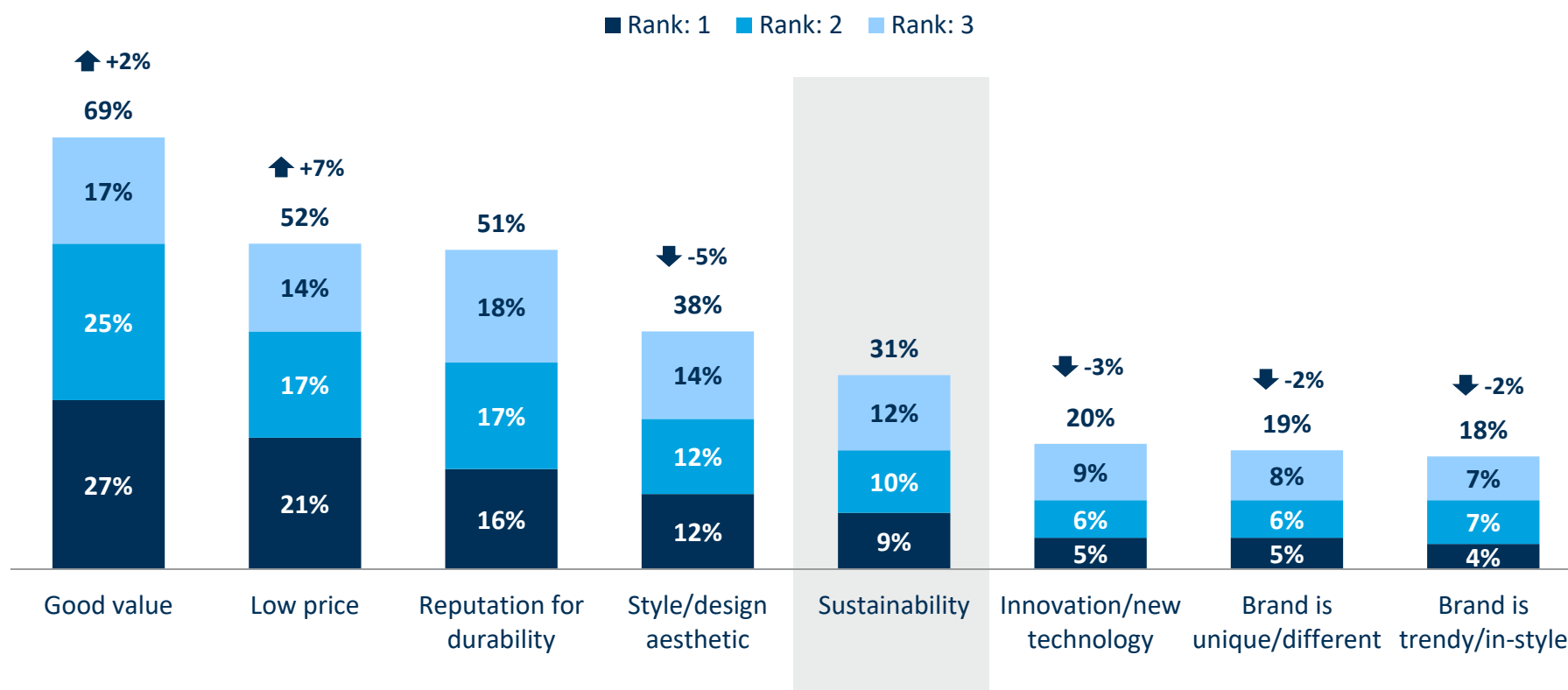
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



# Three in ten ACLBP consumers say sustainability is an important factor when shopping for these products, with sustainability beating innovation and brand uniqueness & trendiness. With high inflation, value and price have rising importance while style and brand have falling importance.

Now, we would like you to think specifically about shopping for active/casual lifestyle brands. By this, we mean brands focused on athletic, outdoor, or casual lifestyle clothing, footwear and accessories. How important are each of the following to you when making purchase decisions with these types of brands? Please rank them from most important (1) to least important (8). **Among Active/Casual Lifestyle Brand Purchasers.**

## PURCHASING PRIORITIES FOR ACTIVE/CASUAL LIFESTYLE BRANDS

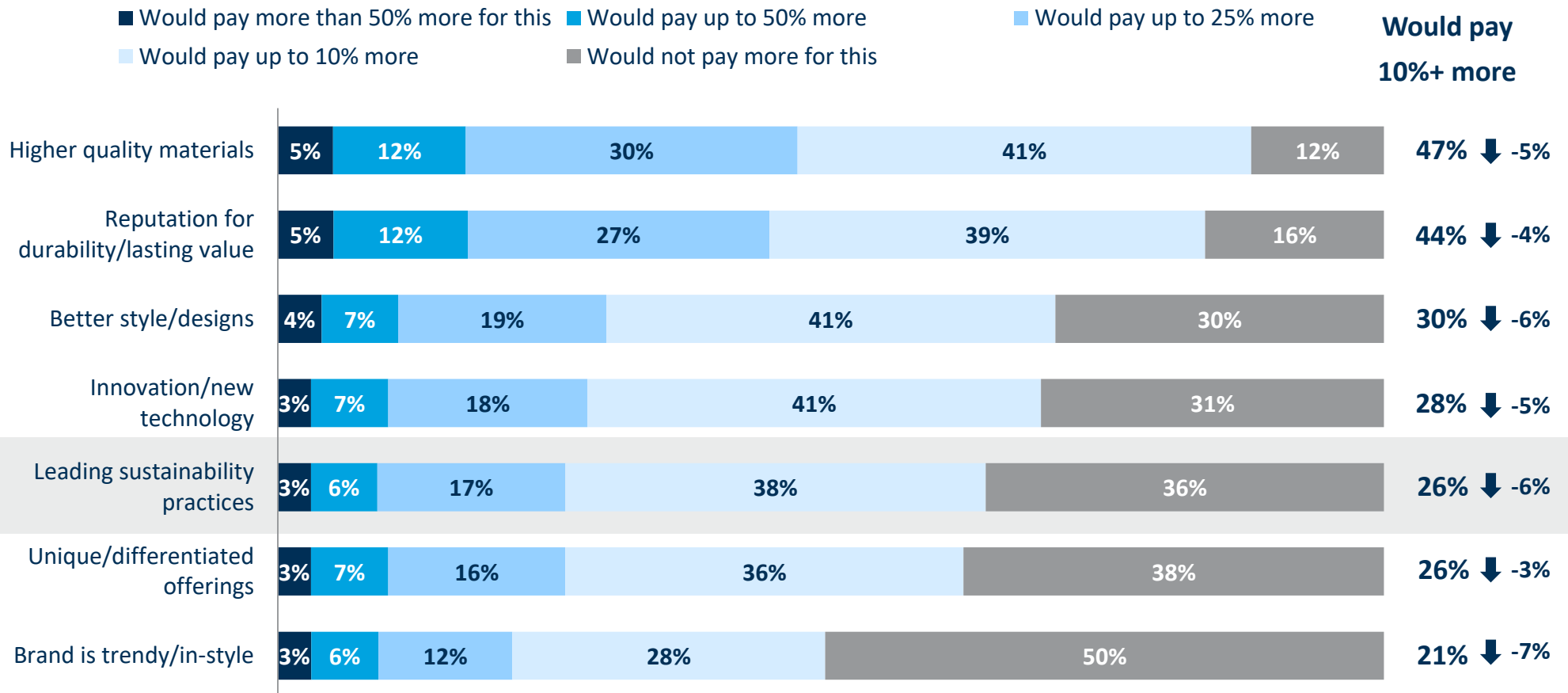


# One in four ACLBP consumers say they would pay 10%+ more for a brand with leading sustainability practices. However, willingness to pay more for all brand benefits is down in the US as consumers face rising prices.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following?

## ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

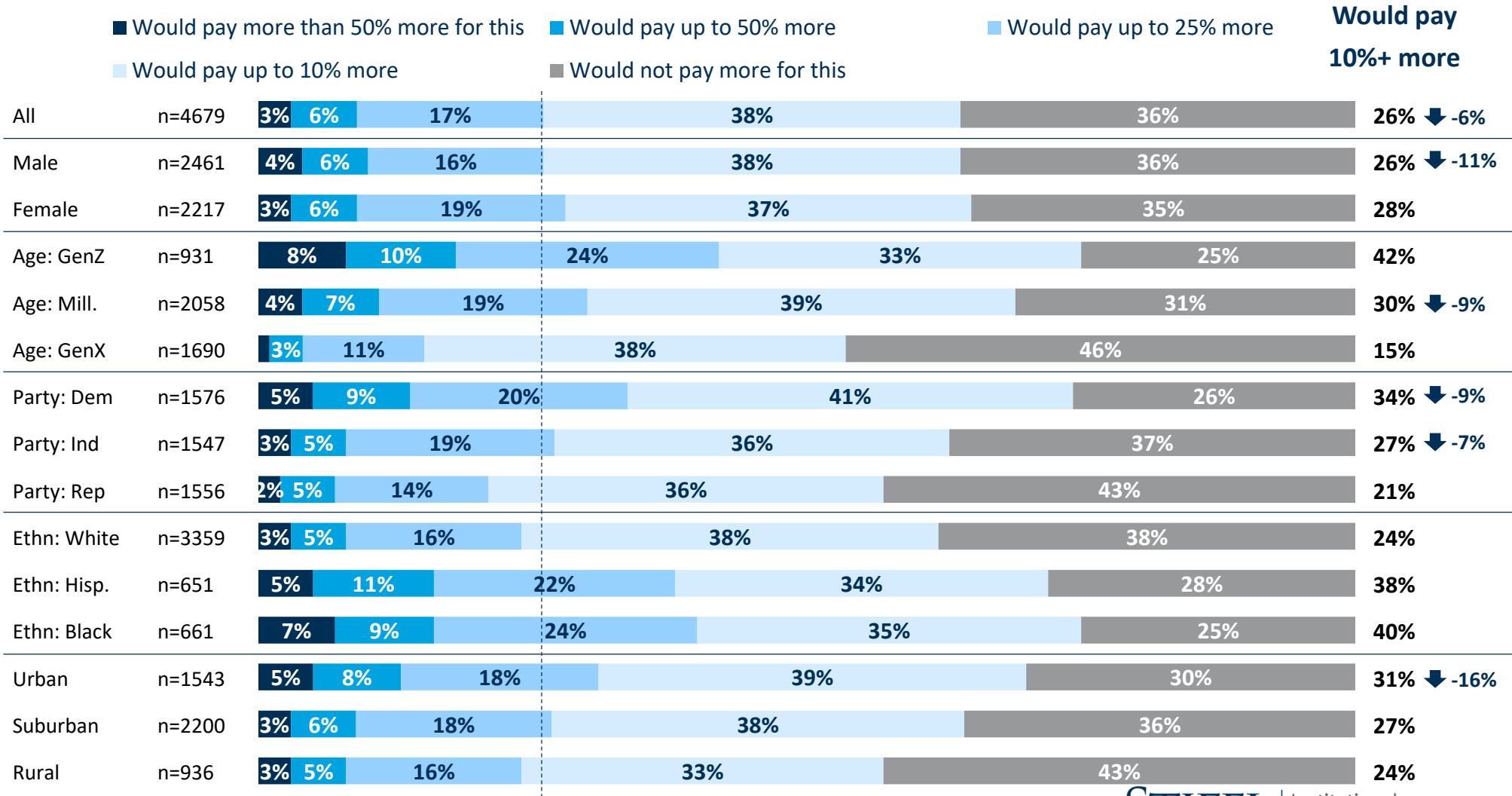
### WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



# Willingness to pay more for brand sustainability is higher among younger consumers, Democrats, Black and Hispanic consumers, and urbanites. However, declines in willingness to pay more are concentrated in urbanites, Dems + Independents, Millennials, and men.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following?

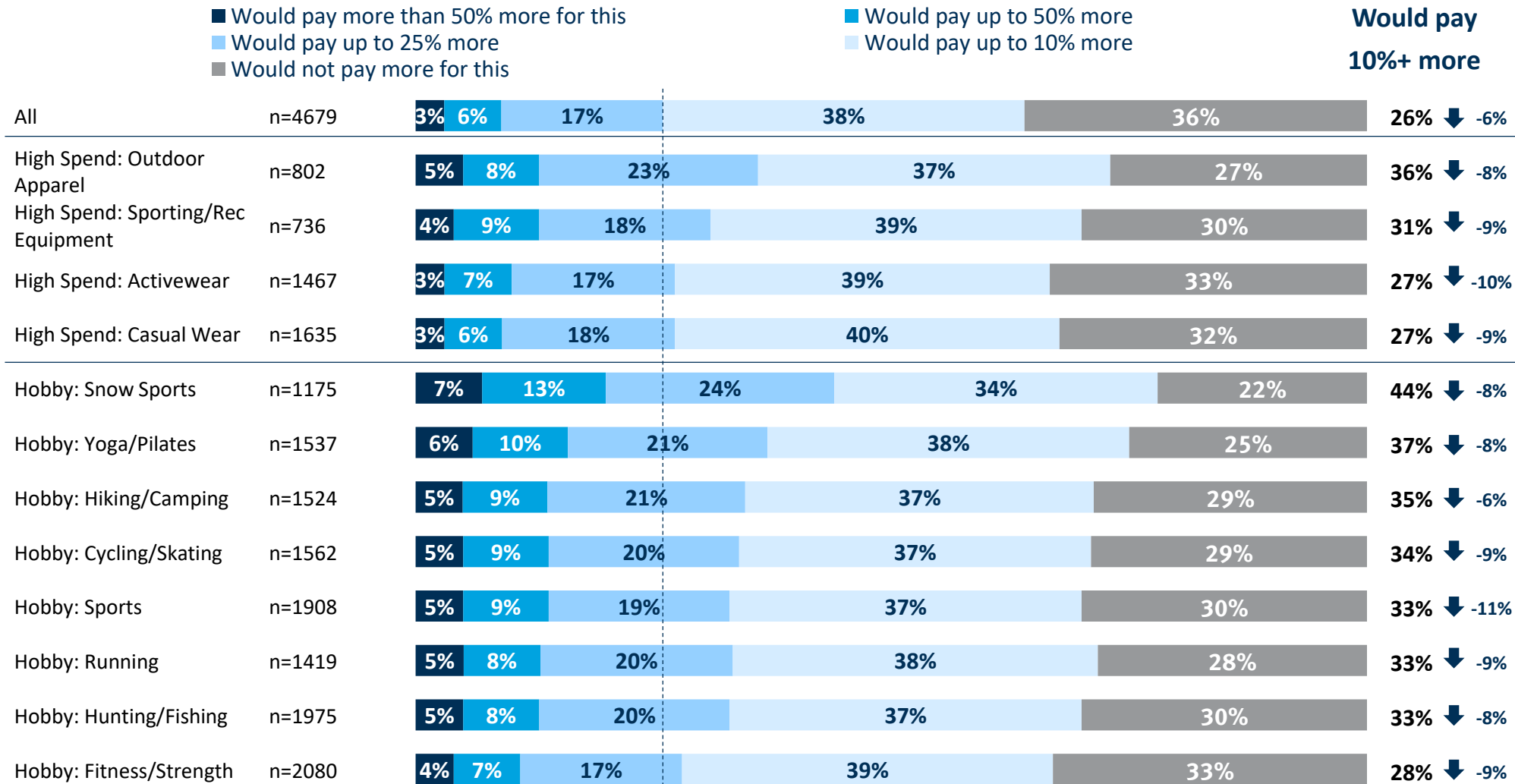
## WILLINGNESS TO PAY MORE FOR “LEADING SUSTAINABILITY PRACTICES”



# High spenders on outdoor apparel and those who do more active/outdoor hobbies (e.g., snow sports, yoga, hiking) are more likely to be willing to spend more on sustainability. However, high spenders and active hobbyists report declining willingness to spend more year-over-year.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following?

## WILLINGNESS TO PAY MORE FOR “LEADING SUSTAINABILITY PRACTICES”



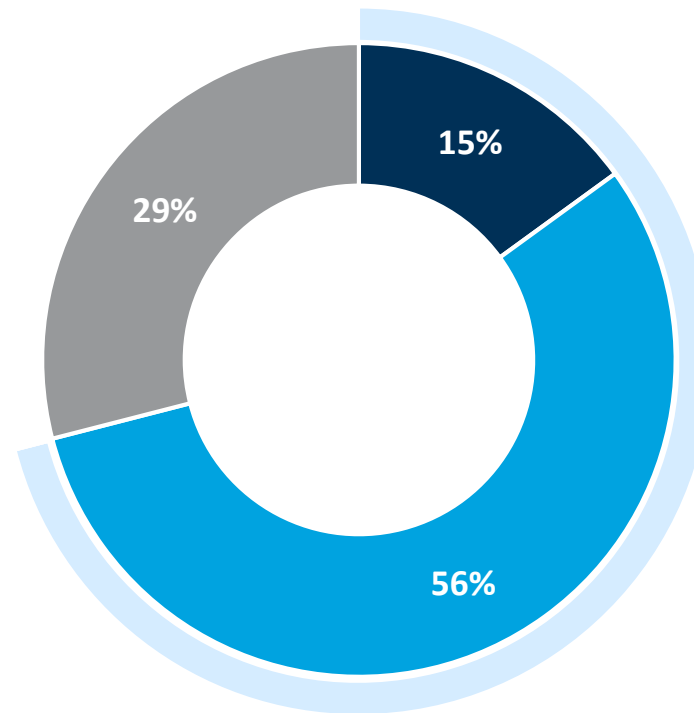


# Seven in ten consumers still say they consider sustainability when choosing between brands.

When choosing between different brands, to what degree does sustainability factor into your decision-making?

## SUSTAINABILITY'S ROLE IN BRAND DECISIONS

- I only buy from brands that I consider sustainable or match my values
- I consider sustainability alongside other factors when choosing between brands
- I rarely consider sustainability when choosing between brands



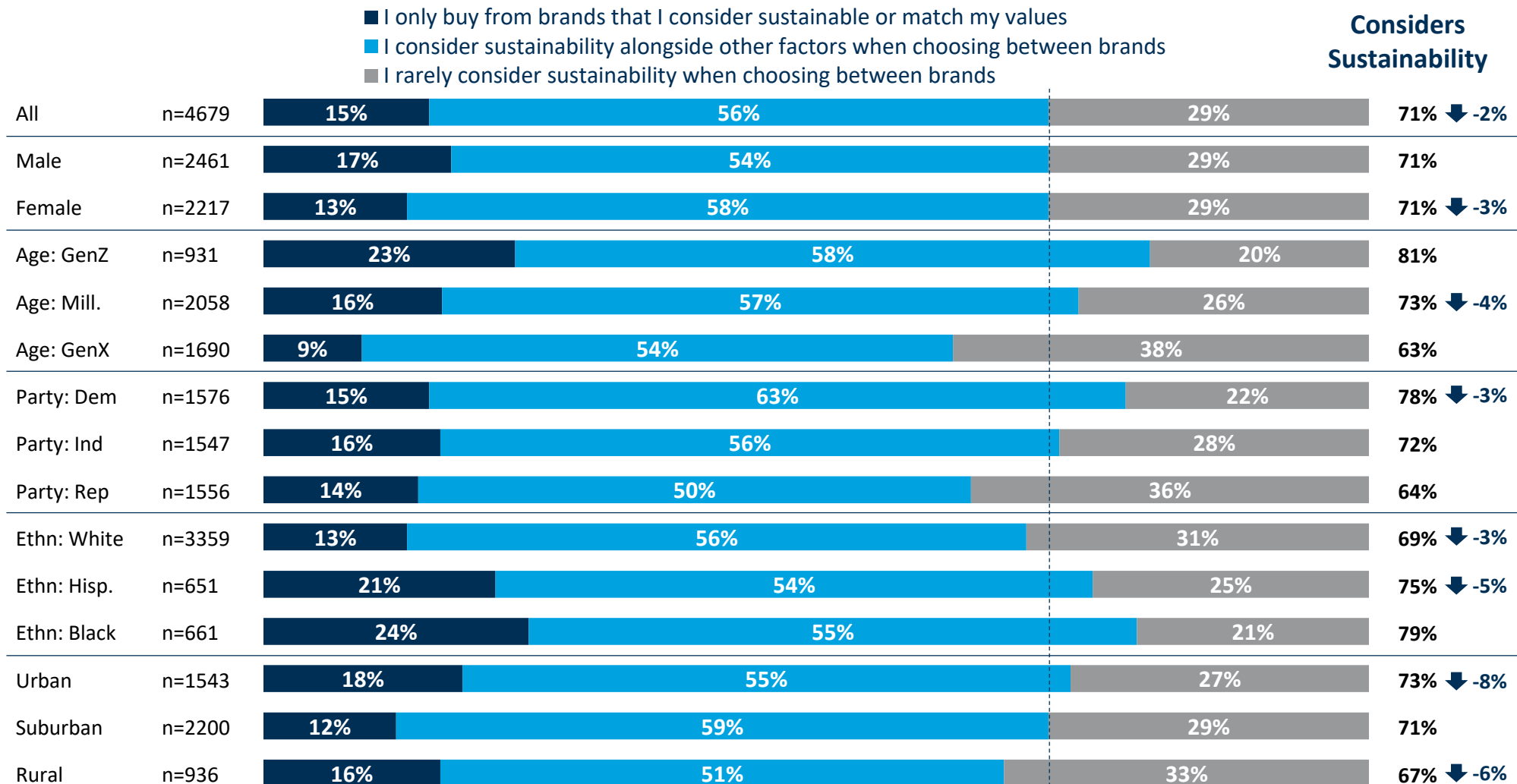
**71% Consider Sustainability when choosing brands**

↓ -2% YoY

# Younger consumers, Democrats, and Black and Hispanic consumers are more likely to consider sustainability when choosing between brands, though Democrats and Millennials are less likely to do so versus 2021.

When choosing between different brands, to what degree does sustainability factor into your decision-making?

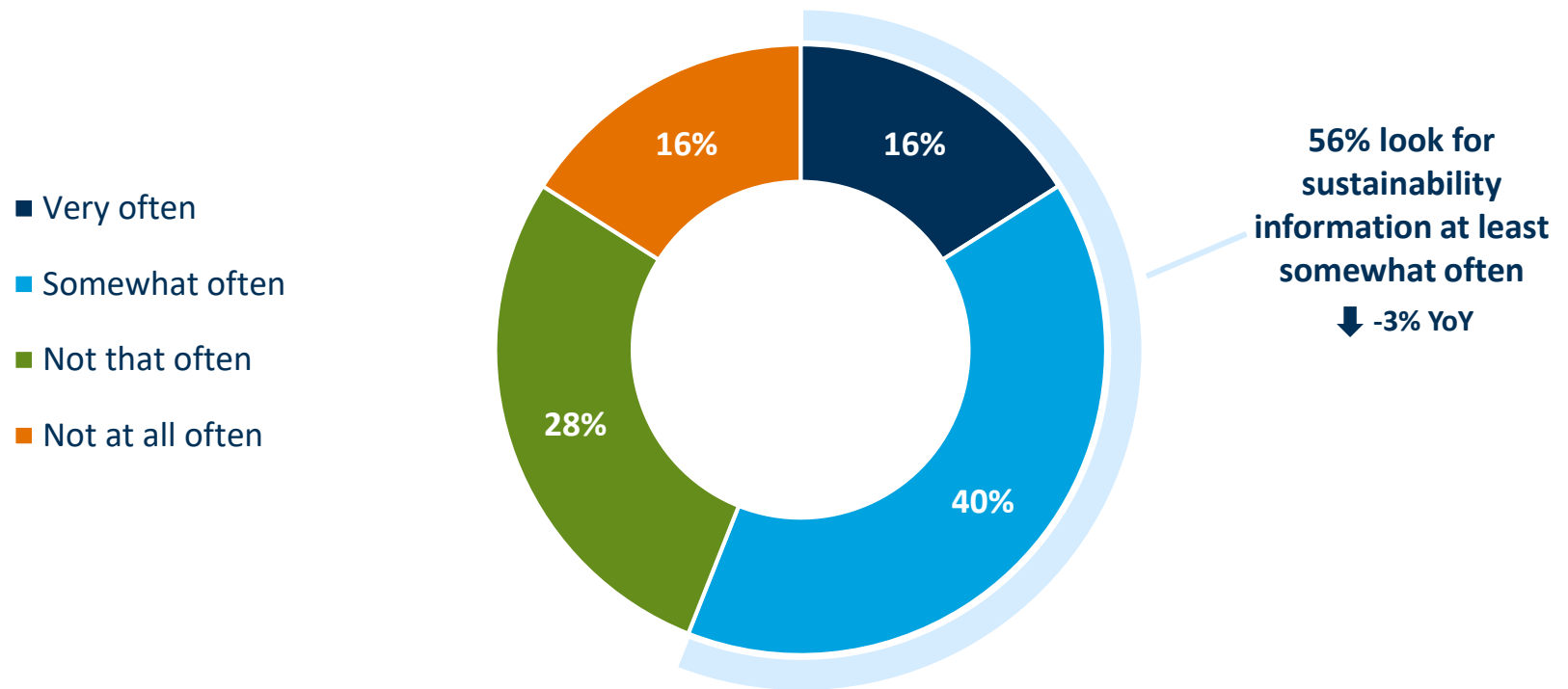
## SUSTAINABILITY'S ROLE IN BRAND DECISIONS



# Over half of consumers still say they look for information about a brand's sustainability practices at least somewhat often, including one in six who do it very often.

How often do you look for information about a brand's sustainability practices when deciding whether to buy a product from that brand?

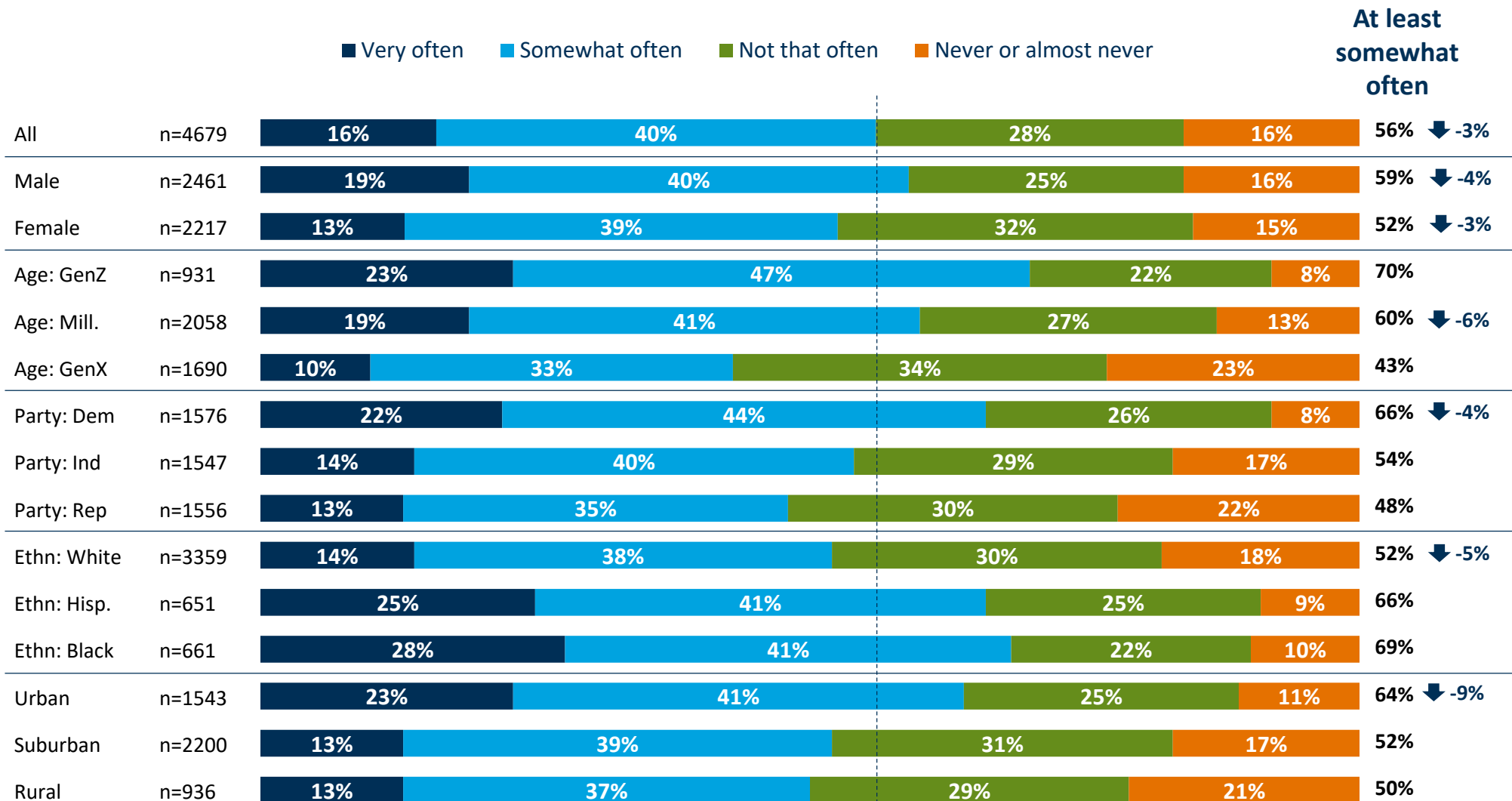
## LOOKING FOR INFORMATION ABOUT BRANDS' SUSTAINABILITY



# Males, Millennials, Gen Z, Democrats, Hispanic and Black Americans, and urbanites are remain more likely to look for information about different brands when making purchase decisions.

How often do you look for information about a brand's sustainability practices when deciding whether to buy a product from that brand?

## LOOKING FOR INFORMATION ABOUT BRANDS' SUSTAINABILITY



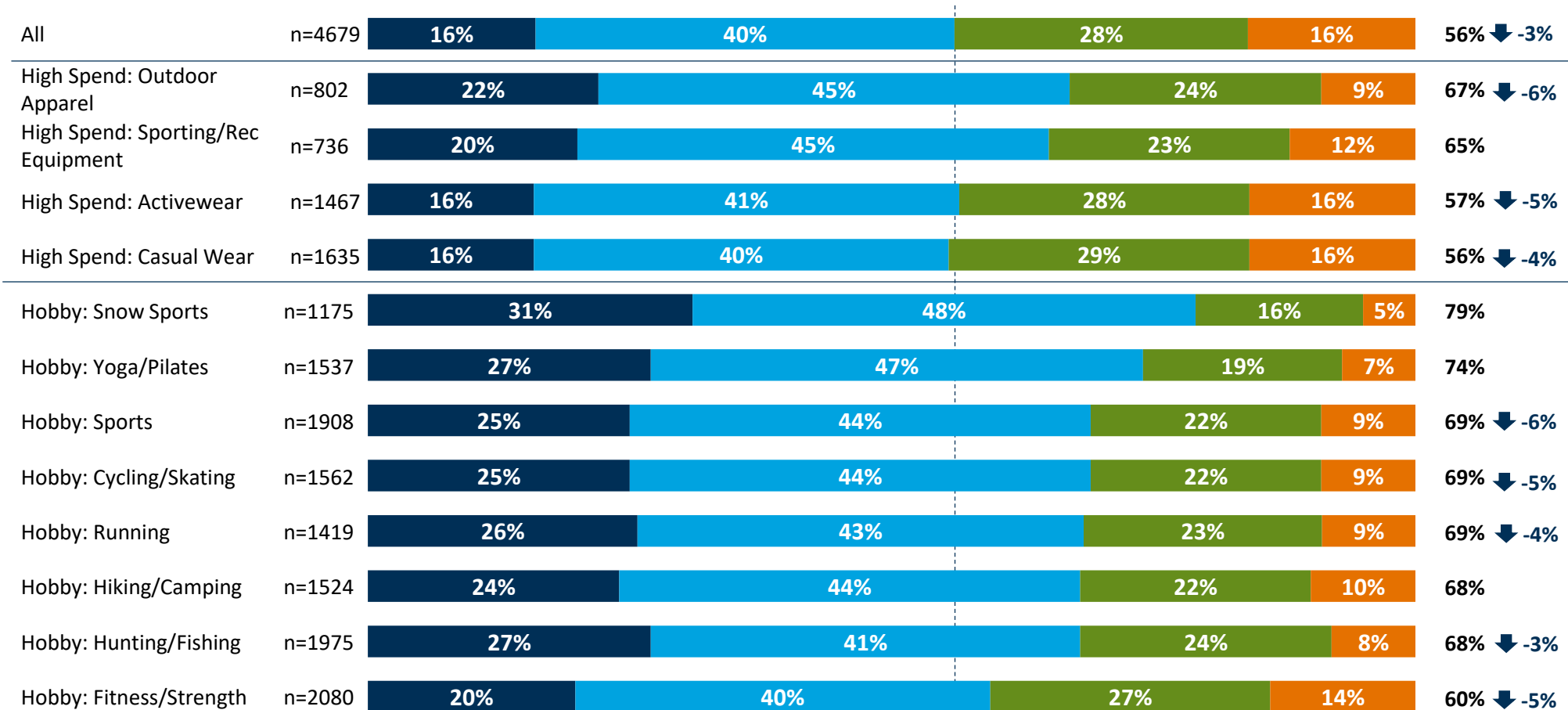
# Higher spenders on outdoor apparel and sports equipment, as well as those with active hobbies like snow sports and pilates, are more likely to look for information on a brand's sustainability. However, fewer high spenders and hobbyists are doing this than this time last year.

How often do you look for information about a brand's sustainability practices when deciding whether to buy a product from that brand?

## LOOKING FOR INFORMATION ABOUT BRANDS' SUSTAINABILITY

■ Very often   
 ■ Somewhat often   
 ■ Not that often   
 ■ Never or almost never

**At least somewhat often**



## S Sustainable Brand Index

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# Sustainability Index Score Methodology

Stifel and Morning Consult measured sustainability ratings for 50 active/casual lifestyle brands among n=4,756 active/casual lifestyle brand consumers in the US. Active/casual lifestyle brands were measured according to three metrics of sustainability: environmental sustainability, ethical business practices, and social sustainability.

Each survey respondent saw a randomly selected list of 35 of our 50 brands and indicated their level of familiarity for each brand. Then, for each sustainability metric, respondents rated brand performance on a four-point scale, or could elect to say they had no opinion on that brand for the given sustainability metric. Respondents only rated sustainability performance for the brands they previously indicated they were familiar with. For a full list of included brands, see appendix.

## Environmental Sustainability

In general, how good of a job do you think each of the following companies are doing with regards to **environmental sustainability**?

As a reminder, **environmental sustainability** refers to environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc.

- 1) Excellent
- 2) Good
- 3) Just fair
- 4) Poor
- 5) Don't know / no opinion

## Ethical Business Practices

In general, how good of a job do you think each of the following companies are doing with regards to **ethical business practices**?

As a reminder, **ethical business** refers to ethical business operations, such as fair labor practices, paying employees fair wages and benefits, international sourcing from places that treat workers fairly, fair trade, promoting worker health, safety, and human rights, etc.

- 1) Excellent
- 2) Good
- 3) Just fair
- 4) Poor
- 5) Don't know / no opinion

## Social Sustainability

In general, how good of a job do you think each of the following companies are doing with regards to **social sustainability**?

As a reminder, **social sustainability** refers to good community stewardship, such as promoting diversity and inclusion efforts, community engagement, local investment and development, philanthropy and charity, volunteerism, helping traditionally unempowered or underserved groups, etc.

- 1) Excellent
- 2) Good
- 3) Just fair
- 4) Poor
- 5) Don't know / no opinion

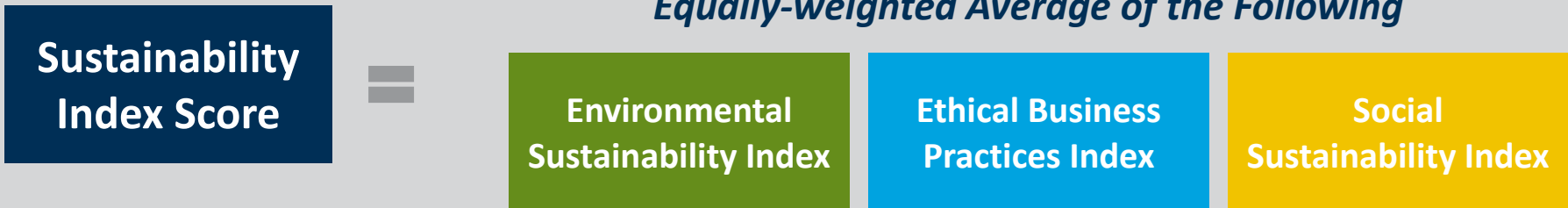
# Sustainability Index Score Methodology (Continued)

For each of our three sustainability metrics, we computed **brand index scores** using the following methodology:

Step 1	Step 2	Step 3
<p>Calculations for each brand focus on those who selected a response on our four-point scale, excluding those who selected “Don’t know / No Opinion”</p> <p>In this way, brands are only graded by those who have an opinion on their sustainability for a given metric</p>	<p>Calculate raw scores for each brand by adding value for positive ratings and subtracting value for negative ratings</p> <p>“Excellent” and “Poor” were given twice the weight of “Good” and “Just fair” to ensure more polarized views were reflected in the scores</p>	<p>Convert raw scores to index scores, where the average score for each metric is indexed to 100</p> <p>This ensures our three metrics are uniform, and scores can be compared across metrics to evaluate relative performance</p>
<ol style="list-style-type: none"> <li>1) Excellent</li> <li>2) Good</li> <li>3) Just fair</li> <li>4) Poor</li> <li>5) <del>Don’t know / no opinion</del></li> </ol>	<ul style="list-style-type: none"> <li>+ 2x % Excellent</li> <li>+ 1x % Good</li> <li>- 1x % Just fair</li> <li>- 2x % Poor</li> </ul>	$\frac{\text{Brand A Raw Score}}{\text{Avg. Metric Raw Score}} = \text{Brand A Index Score}$

Then, we computed our aggregate **sustainability index score** by averaging the three metric index scores for each brand.

**Equally-weighted Average of the Following**

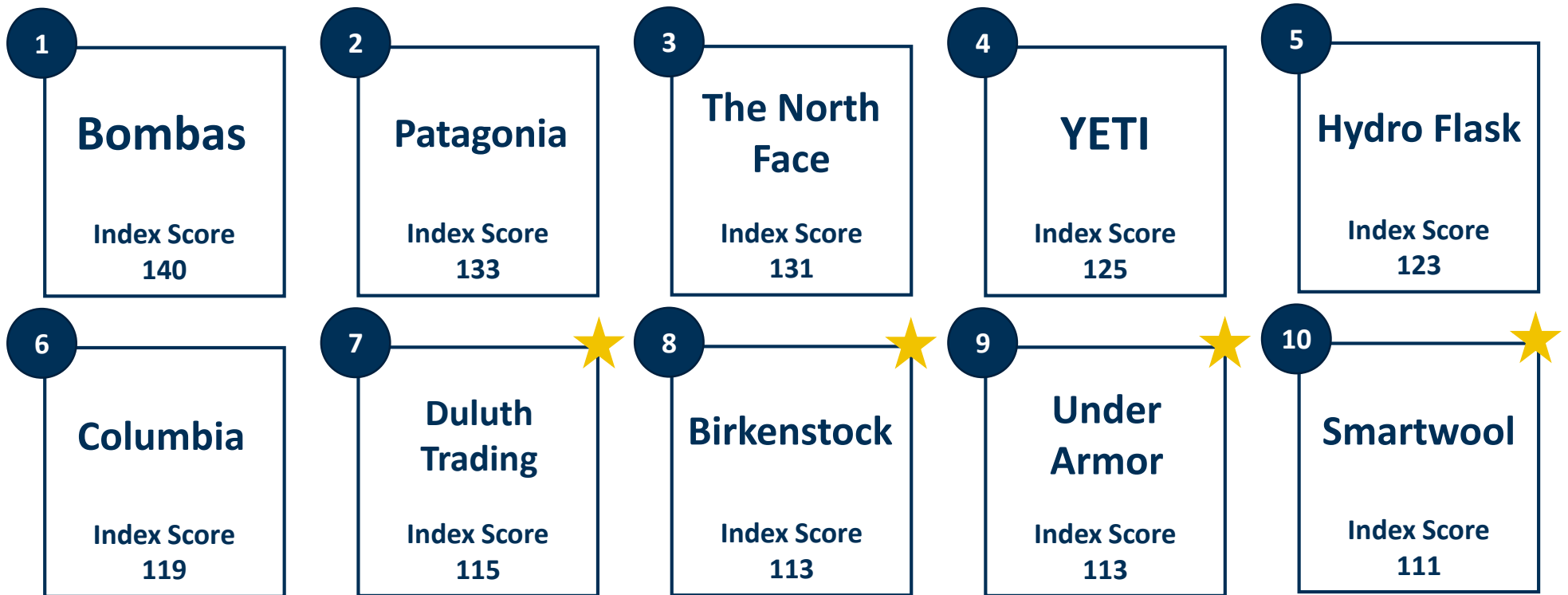




**Bombas, Patagonia, and The North Face are top three most sustainable brands for the second straight year. Duluth Trading, Smartwool, Birkenstock, and Under Armor join the top 10 for the first time, while four footwear brands (Adidas, Allbirds, Puma, Rothy's) fall out of the top 10.**

*The Sustainability Index averages together brand scores on Environmental Sustainability, Ethical Business Practices, and Social Sustainability. All scores are reflective of interviews among Active/Casual Lifestyle Brand Purchasers, with each metric given an equal weight. For more information for how these scores were calculated, please see Sustainability Brand Index Methodology pages.*

**SUSTAINABILITY BRAND INDEX – TOP SCORING BRANDS**

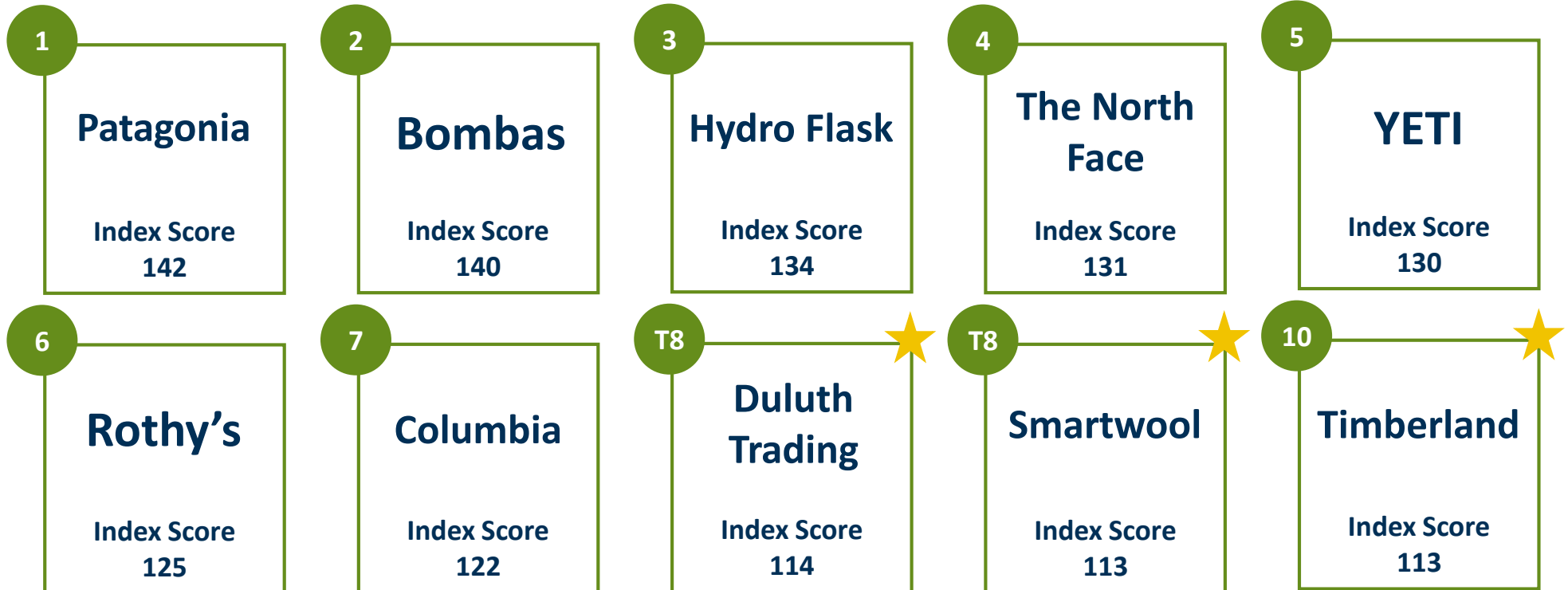


# Outdoor apparel brands (The North Face, Patagonia, Columbia) and brands replacing single-use items (Hydro Flask, YETI) continue to score highly on environmental sustainability. Duluth Trading, Smartwool, and Timberland enter the top 10 for the first time.

Index scores based on Active/Casual Lifestyle Brand Purchasers answering the following question: In general, how good of a job do you think each of the following companies are doing with regards to environmental sustainability? Respondents also saw the definition below. For more information for how these scores were calculated, please see Sustainability Brand Index Methodology pages.

## ENVIRONMENTAL SUSTAINABILITY – TOP SCORING COMPANIES

For the purposes of this survey, **environmental sustainability** refers to environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc.

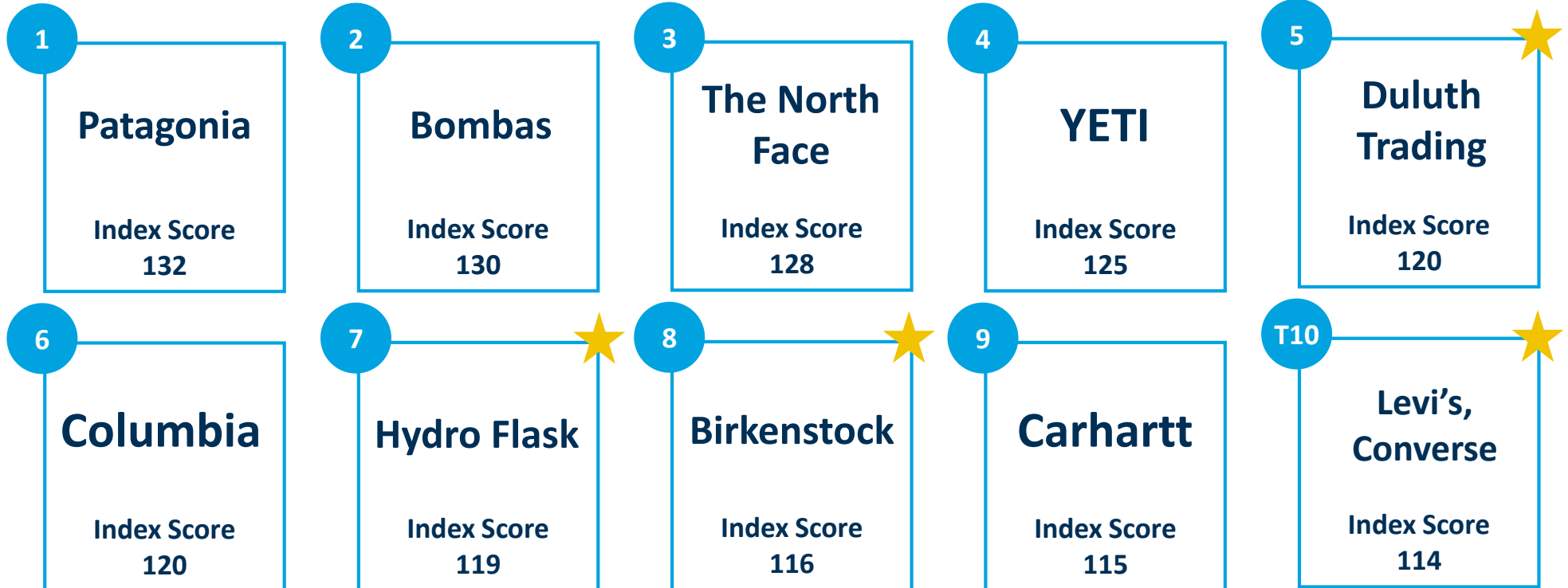


# Patagonia edges past Bombas as the brand with the most ethical business practices. Outdoor apparel brands (Patagonia, The North Face, Columbia) and workwear brands (Duluth Trading, Carhartt) among those scoring very highly on business ethics.

Index scores based on Active/Casual Lifestyle Brand Purchasers answering the following question: In general, how good of a job do you think each of the following companies are doing with regards to ethical business practices? Respondents also saw the definition below. For more information for how these scores were calculated, please see Sustainability Brand Index Methodology pages.

## ETHICAL BUSINESS PRACTICES INDEX – TOP SCORING BRANDS

For the purposes of this survey, **ethical business practices** refers to fair and principled business operations, such as fair labor standards, paying employees fair wages and benefits, international sourcing from places that treat workers fairly, fair trade, promoting worker health, safety, and human rights, etc.

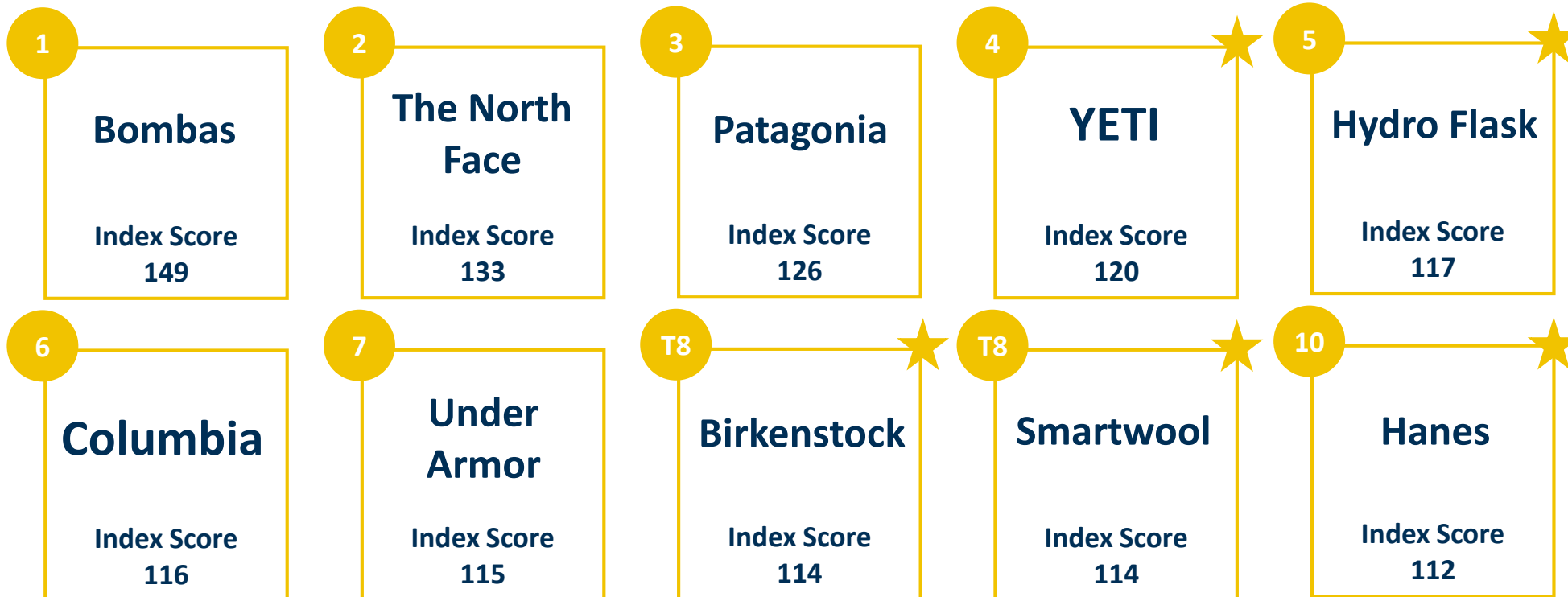


# Bombas leads on social sustainability; YETI and Hydro Flask moved into the top five on social sustainability this year, and Birkenstock, Smartwool, and Hanes also moved into the top 10, replacing some sports and footwear brands (Adidas, Vuori, Jordan, Puma, Nike)

Index scores based on Active/Casual Lifestyle Brand Purchasers answering the following question: In general, how good of a job do you think each of the following companies are doing with regards to social sustainability? Respondents also saw the definition below. For more information for how these scores were calculated, please see Sustainability Brand Index Methodology pages.

## SOCIAL SUSTAINABILITY – TOP SCORING BRANDS

As a reminder, **social sustainability** refers to good community stewardship, such as promoting diversity and inclusion efforts, community engagement, local investment and development, philanthropy and charity, volunteerism, helping traditionally unempowered or underserved groups, etc.



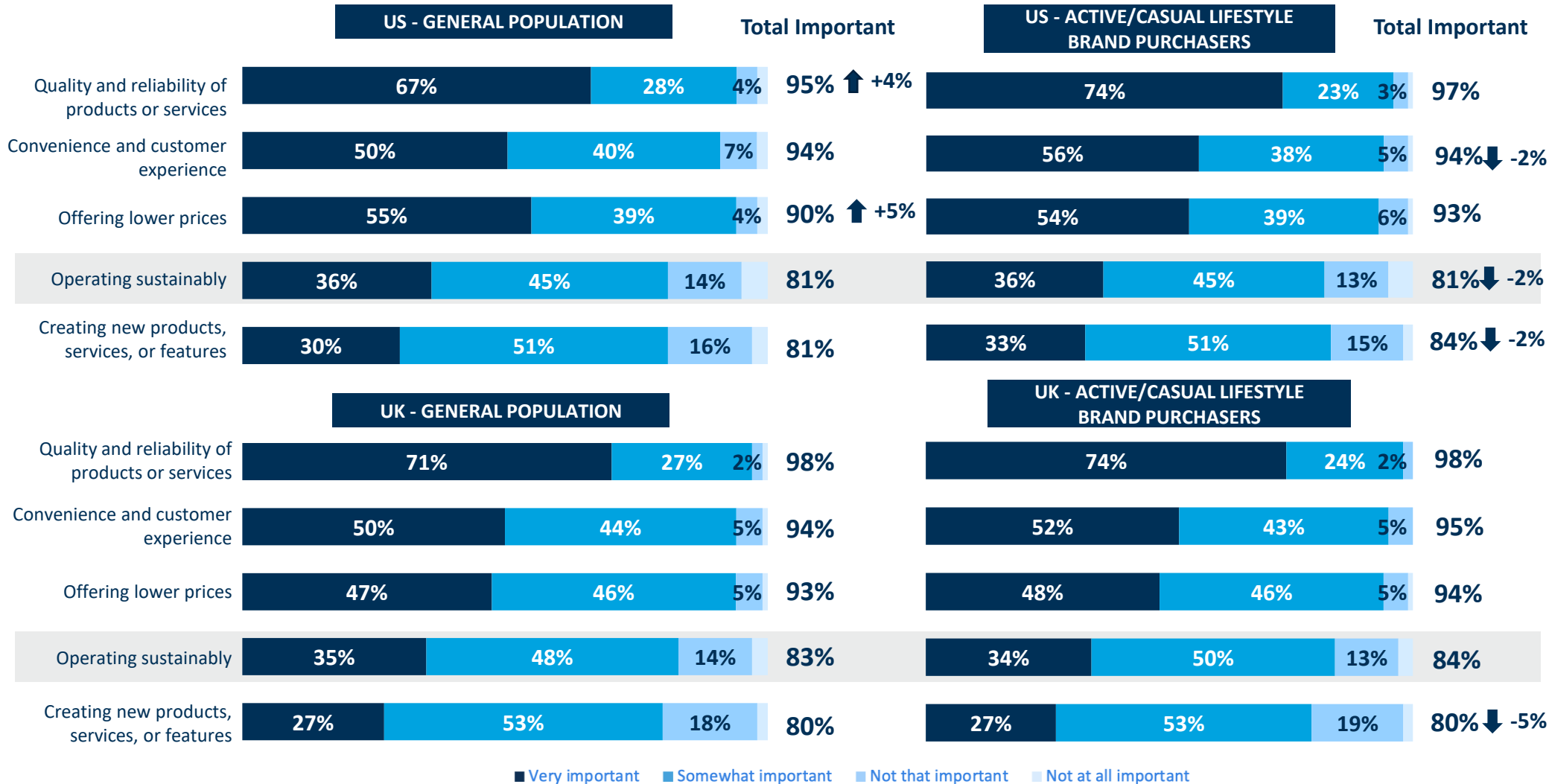
## **S** International Findings

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# Across markets, a large majority of consumers say it's important for brands to focus on operating sustainably, with at least one in three saying it's "very important" in each market.

Broadly, how important is it to you that brands focus on the following? Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)"

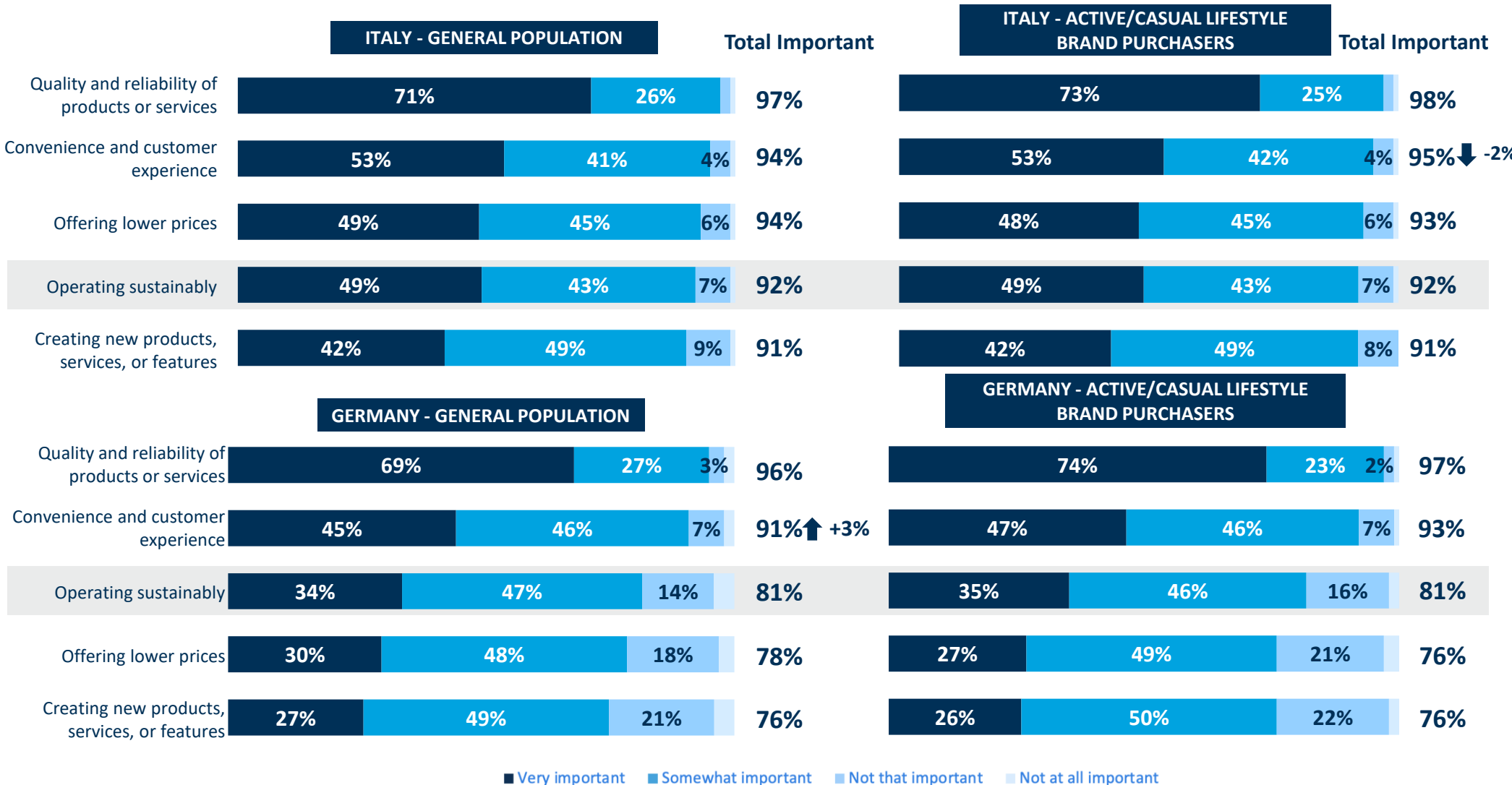
## BRAND PRIORITIES



# However, across markets, operating sustainably continues to score behind priorities like quality/reliability, convenience/customer experience, and lower prices.

Broadly, how important is it to you that brands focus on the following? Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)"

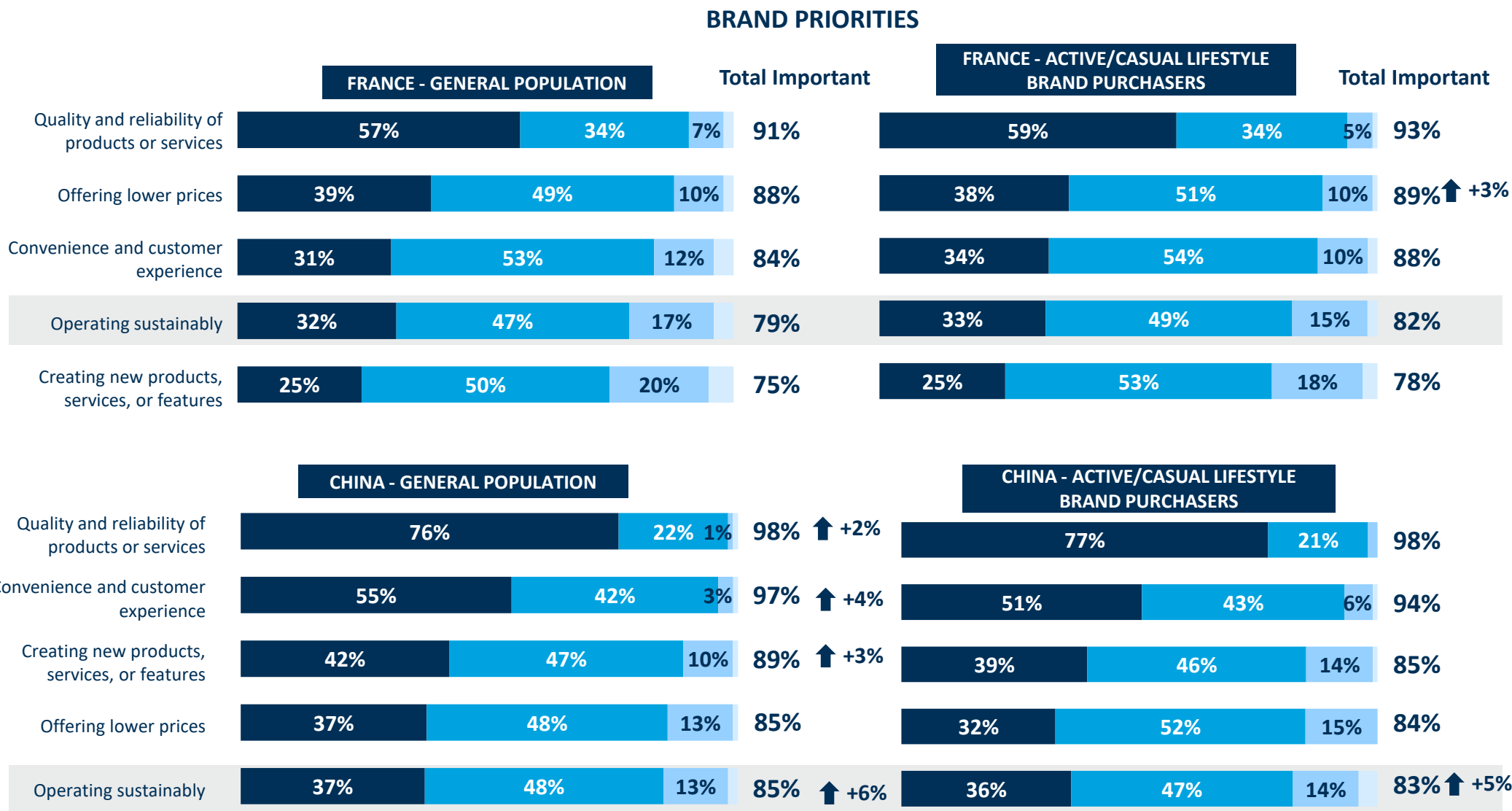
## BRAND PRIORITIES



■ Very important ■ Somewhat important ■ Not that important ■ Not at all important

# Chinese consumers report rising levels of importance for sustainability year-over-year, while other markets are flat or down.

Broadly, how important is it to you that brands focus on the following? Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)"



■ Very important ■ Somewhat important ■ Not that important ■ Not at all important

**STIFEL** | Institutional Group



# Large majorities in each market say that its important for brands to operate with environmental sustainability, with at least two in five calling it very important. British and French consumers rate environmental sustainability more important than social sustainability.

For the purposes of this survey, environmental sustainability refers to environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc. How important is it to you that brands operate in an environmentally sustainable way?

## IMPORTANCE OF ENVIRONMENTAL SUSTAINABILITY

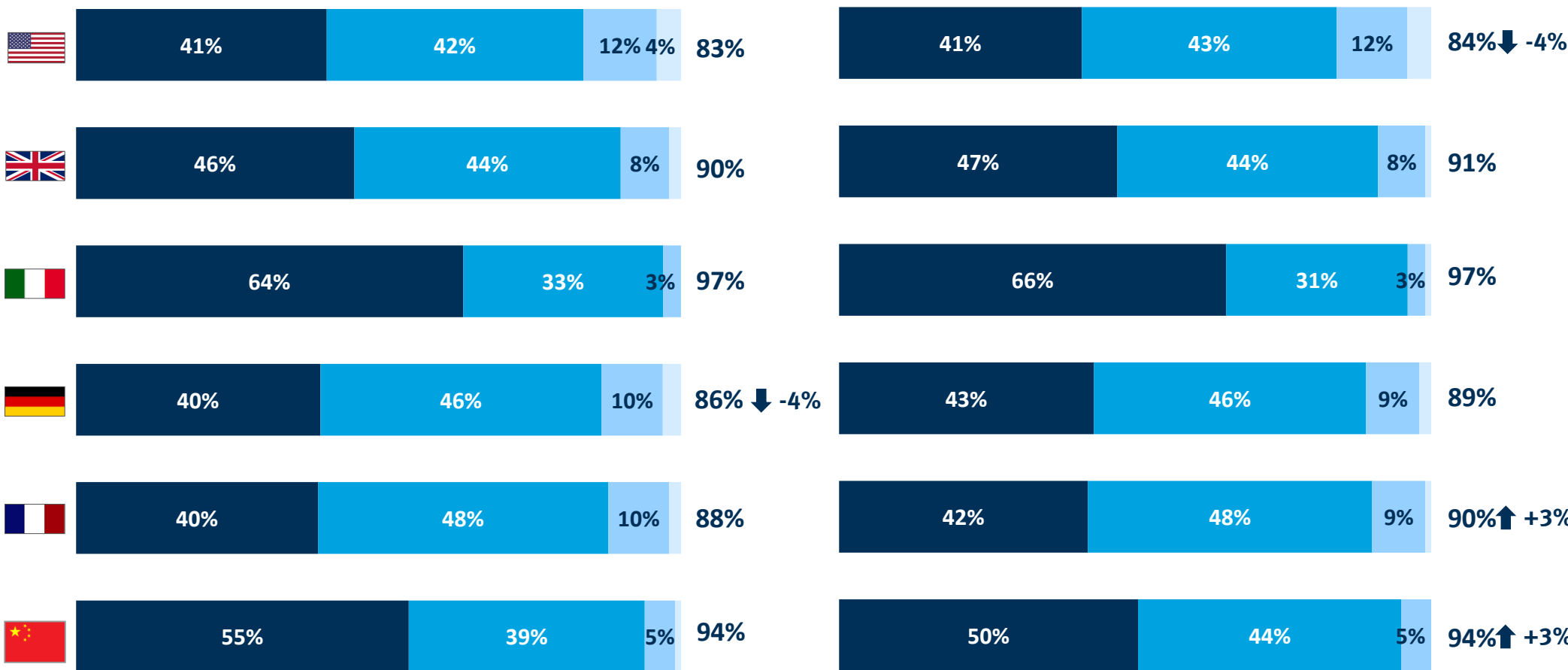
■ Very important   ■ Somewhat important   ■ Not that important   ■ Not at all important

### GENERAL POPULATION

Total Important

### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



# Similarly, large majorities internationally find it important for brands to use ethical business practices, with at least two in five calling it very important. More US and UK consumers rate ethical business practices important than for environmental or social sustainability.

For the purposes of this survey, ethical business practices refers to fair and principled business operations, such as fair labor standards, paying employees fair wages and benefits, international sourcing from places that treat workers fairly, fair trade, promoting worker health, safety, and human rights, etc. How important is it to you that brands operate with ethical business practices?

## IMPORTANCE OF ETHICAL BUSINESS PRACTICES

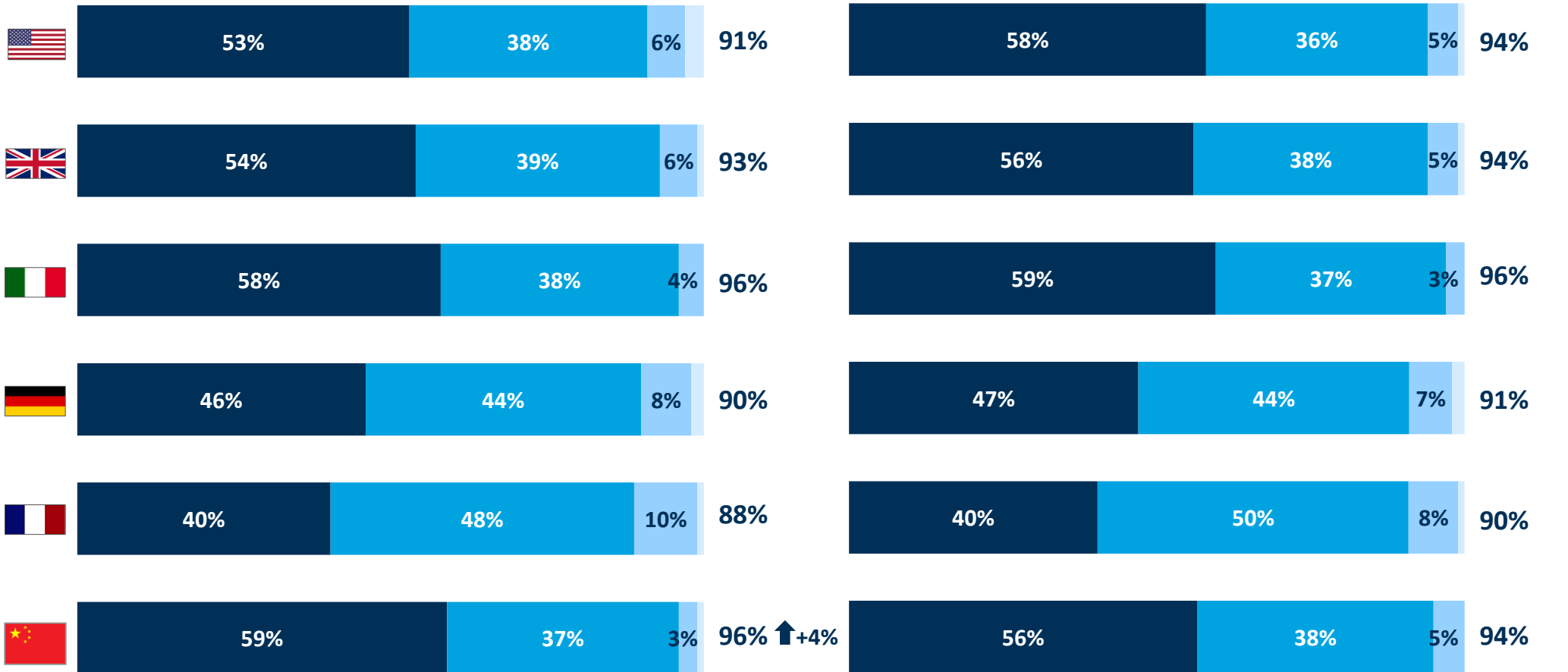
■ Very important ■ Somewhat important ■ Not that important ■ Not at all important

### GENERAL POPULATION

Total Important

### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



# Most consumers internationally find it important for brands to operate in a socially sustainable way, with at least one in three calling it very important. However, social sustainability generally scores lower than environmental sustainability and ethical business practices.

For the purposes of this survey, social sustainability refers to good community stewardship, such as promoting diversity and inclusion efforts, community engagement, local investment and development, philanthropy and charity, volunteerism, helping traditionally unempowered or underserved groups, etc. How important is it to you that brands operate in socially sustainable way?

## IMPORTANCE OF SOCIAL SUSTAINABILITY

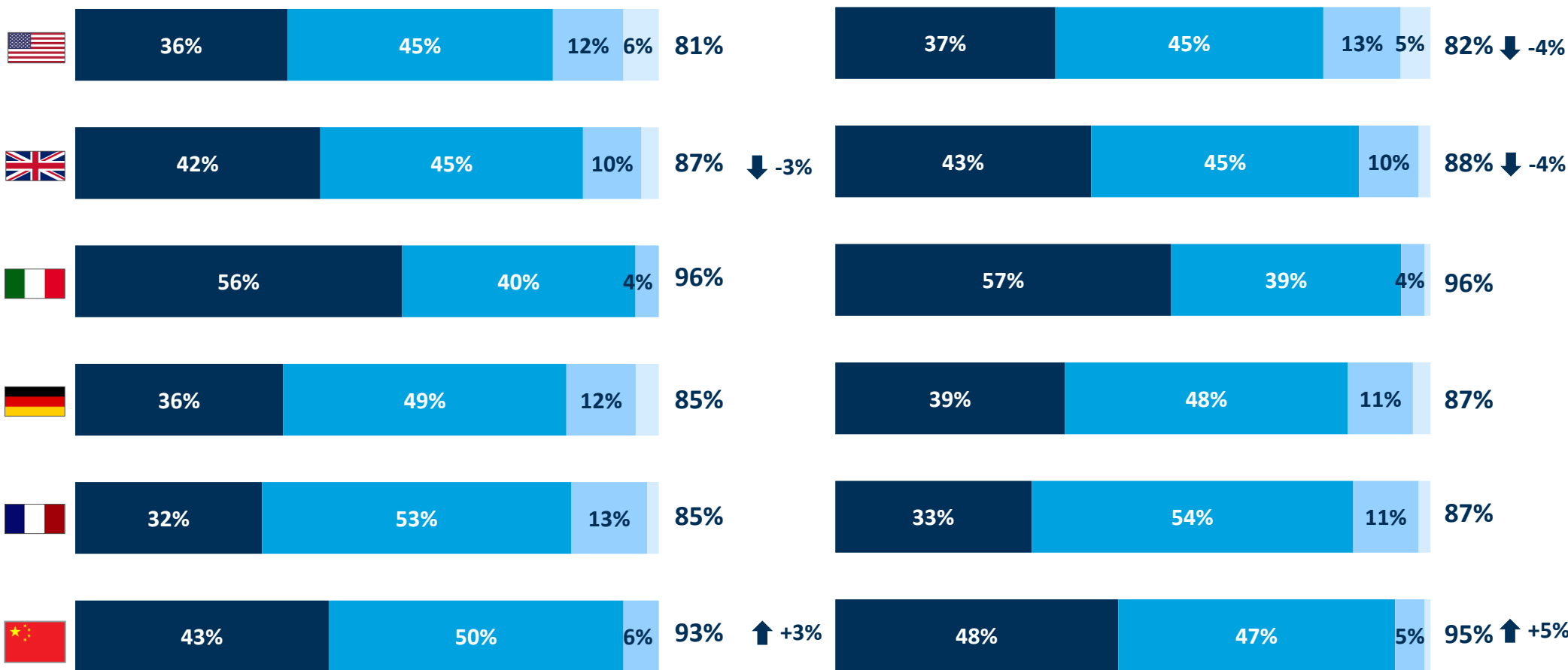
■ Very important  
 ■ Somewhat important  
 ■ Not that important  
 ■ Not at all important

### GENERAL POPULATION

Total Important

### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



# International markets are more likely to prioritize environmental actions for brands, such as protecting local ecosystems, minimizing packaging, and reducing emissions. Chinese consumers are placing higher importance on some environmental and ethical business actions.

How important is it to you that brands focus on the following? Shown among *Active/Casual Lifestyle Brand Purchasers*. Showing % Very Important

	US	UK	Italy	Germany	France	China
Giving workers fair pay and benefits	58% ↓ -2%	58%	59%	51%	42%	50% ↑ +5%
Ensuring they pay their fair share in taxes	48%	58%	54%	41%	35%	43%
Promoting work/life balance for employees	46%	45%	52%	36%	37%	40%
Creating more domestic jobs	45%	35%	58%	40%	36% ↓ -5%	41%
Protects human rights in the global supply chain	45%	49%	57%	44%	39% ↓ -7%	41% ↑ +8%
Protecting international worker health, safety, and human rights	45% ↓ -5%	49%	65%	47%	42% ↓ -6%	47%
Supporting racial equality	43% ↓ -5%	45%	52% ↓ -6%	39%	39%	45%
Supporting gender equality	40% ↓ -5%	40%	51% ↓ -5%	34%	39% ↓ -6%	44%
Protecting local environments/ecosystems	39% ↓ -4%	42%	56% ↓ -5%	44%	43%	63% ↑ +5%
Minimizing packaging/waste	38% ↓ -3%	49%	59%	47%	44% ↓ -6%	49%
Practicing diverse and equitable hiring	38% ↓ -5%	37%	50%	31%	31%	39% ↑ +5%
Reducing carbon emissions	36% ↓ -3%	41%	57%	42%	40%	47%
Investing in the communities they operate in	36% ↓ -3%	33%	43%	27%	25%	23%
Using more renewable or recycled materials	35% ↓ -3%	41%	54%	44% ↑ +5%	38%	43%
Using less energy and water	35% ↓ -2%	41%	54%	45%	40%	49%
Ensuring their products are recycled	30% ↓ -3%	38%	53%	34%	39%	42% ↑ +8%
Achieving carbon neutrality	30%	35%	49% ↓ -5%	37%	32%	43% ↑ +10%
Philanthropy and giving back	30% ↓ -4%	25%	24%	20%	18%	33%
Advocating for environmental causes publicly	29% ↓ -4%	31%	44%	28%	35%	49%
Supporting LGBTQ+ equality	29% ↓ -4%	30%	37%	21%	24% ↓ -4%	26%
Creating products/services tailored to underserved populations	29%	24%	41%	29%	30%	32% ↑ +6%
Advocating for political causes that align with my values	22% ↓ -1%	19%	24%	18%	21%	36%

NB: Blue shading indicates top 6 priorities and orange shading bottom 6 priorities in each market.

## Over the past year, the importance of sustainability has significantly increased in France and China when shopping active/casual lifestyle brands. The biggest declines in importance among US consumers are on price and style/design aesthetic.

Now, we would like you to think specifically about shopping for active/casual lifestyle brands. By this, we mean brands focused on athletic, outdoor, or casual lifestyle clothing, footwear and accessories. How important are each of the following to you when making purchase decisions with these types of brands? Please rank them from most important (1) to least important (8). **Showing % in Top 3 Rankings**

### PURCHASING PRIORITIES FOR ACTIVE/CASUAL LIFESTYLE BRANDS

#### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

	US	UK	Italy	Germany	France	China
Good value	69% <b>↑+2%</b>	69%	75%	71%	70%	62% <b>↓-5%</b>
Low price	52% <b>↑+7%</b>	50%	40%	35%	47%	43%
Reputation for durability	51%	48%	43% <b>↓-5%</b>	52%	30%	49%
Style/design aesthetic	38% <b>↓-5%</b>	43%	35%	38%	34%	23% <b>↓-9%</b>
Sustainability	31%	36%	42%	39%	59% <b>↑+8%</b>	33% <b>↑+5%</b>
Innovation/new technology	20% <b>↓-3%</b>	16% <b>↓-4%</b>	30%	25%	19%	32% <b>↑+5%</b>
Brand is unique/different	19% <b>↓-2%</b>	19%	18%	19%	18%	31%
Brand is trendy/in-style	18% <b>↓-2%</b>	21%	18%	23%	26%	26% <b>↑+4%</b>

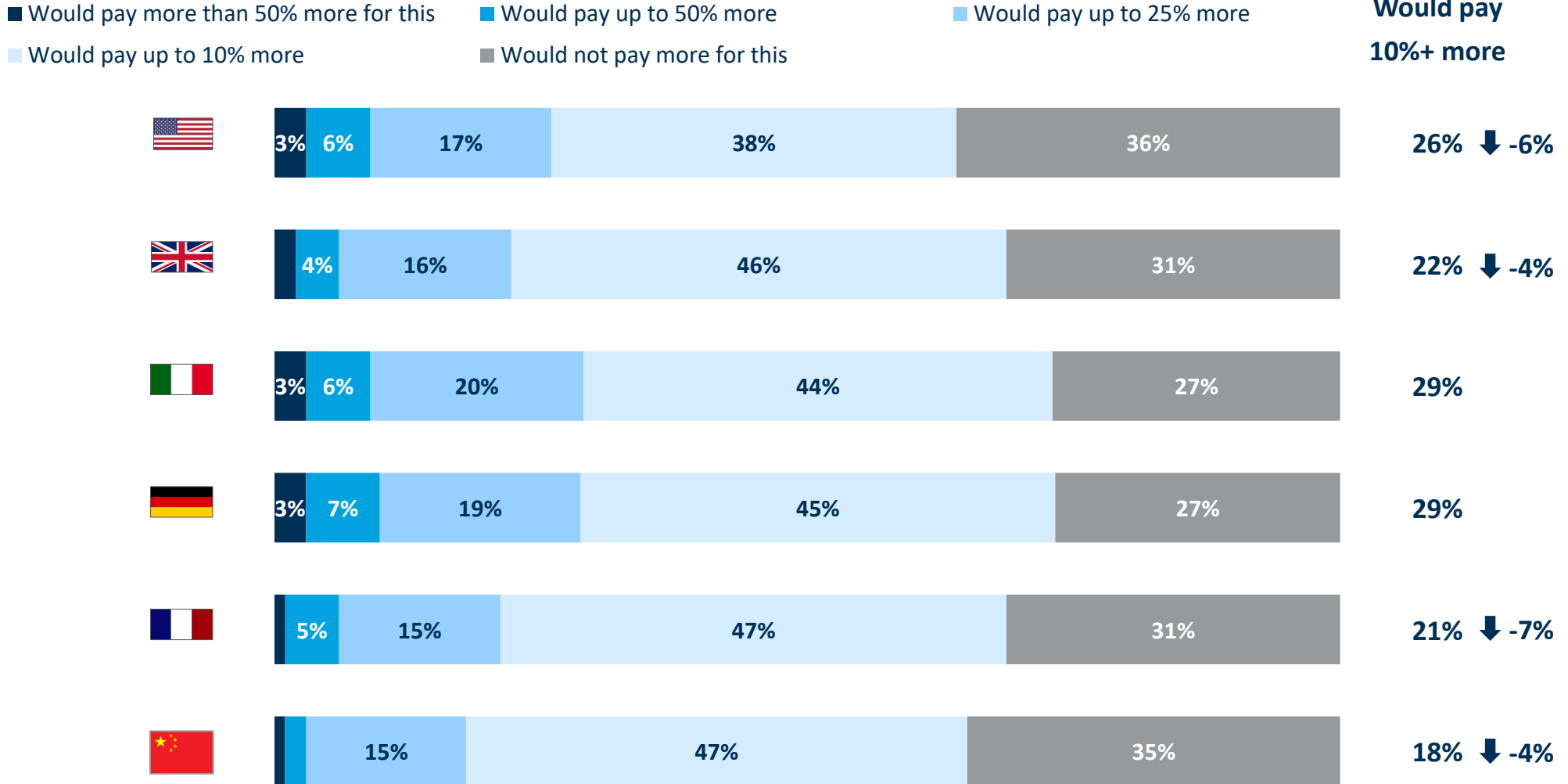
Blue shading indicates top 3 priorities in each market.

# Four in six markets (US, UK, FR, and CN) report less willingness to pay more for leading sustainability practices than this time a year ago. Italian and German consumers are most likely to pay more, while the US ranks third.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following? Shown among Active/casual lifestyle brand purchasers.

## WILLINGNESS TO PAY MORE FOR “LEADING SUSTAINABILITY PRACTICES”

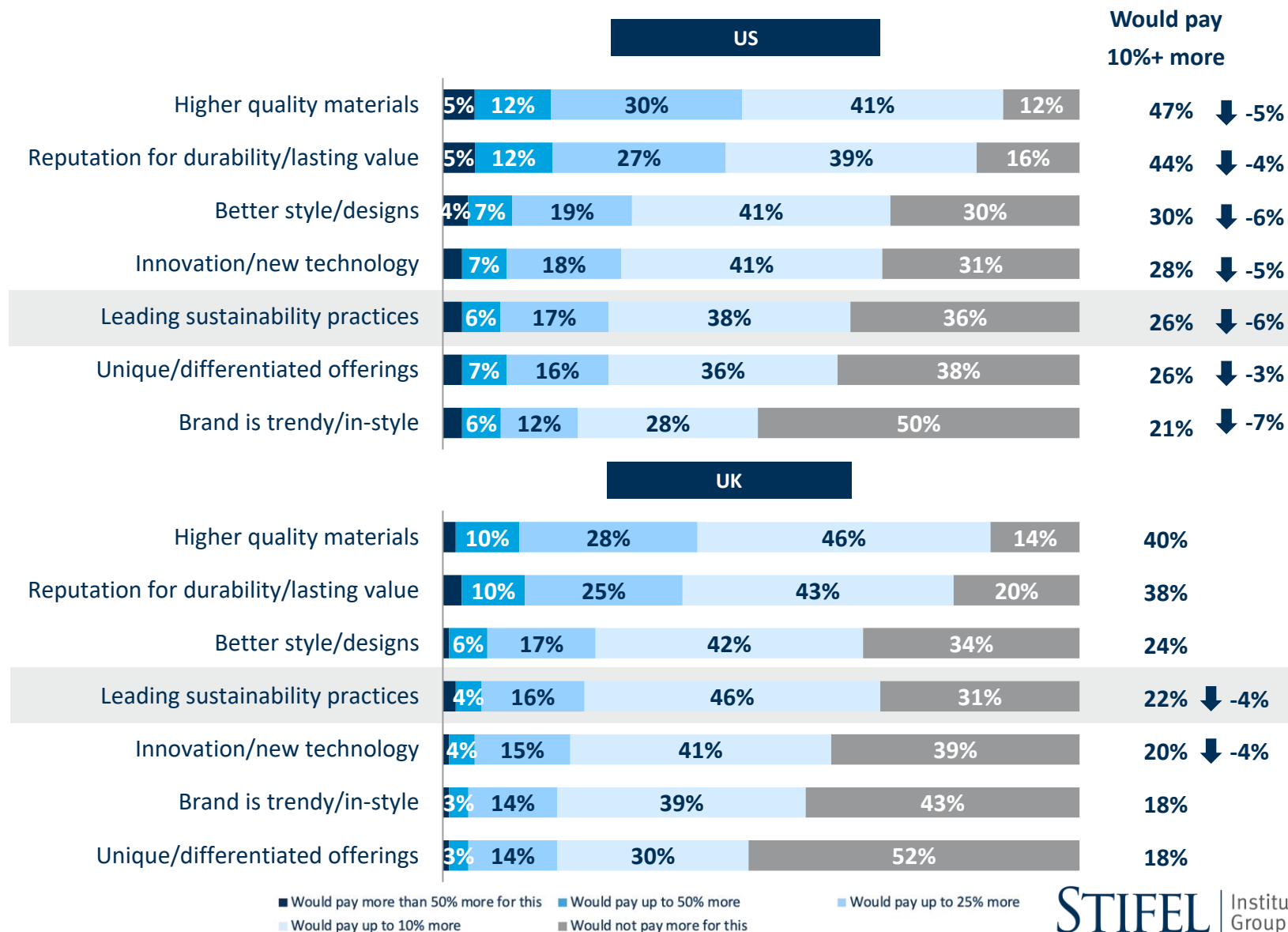
### ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS



# In most markets, including US and UK, consumers are most willing to pay more for quality materials and durable products, while sustainability rates alongside innovation, style, and unique offerings.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following? **Shown among Active/Casual Lifestyle Brand Purchasers**

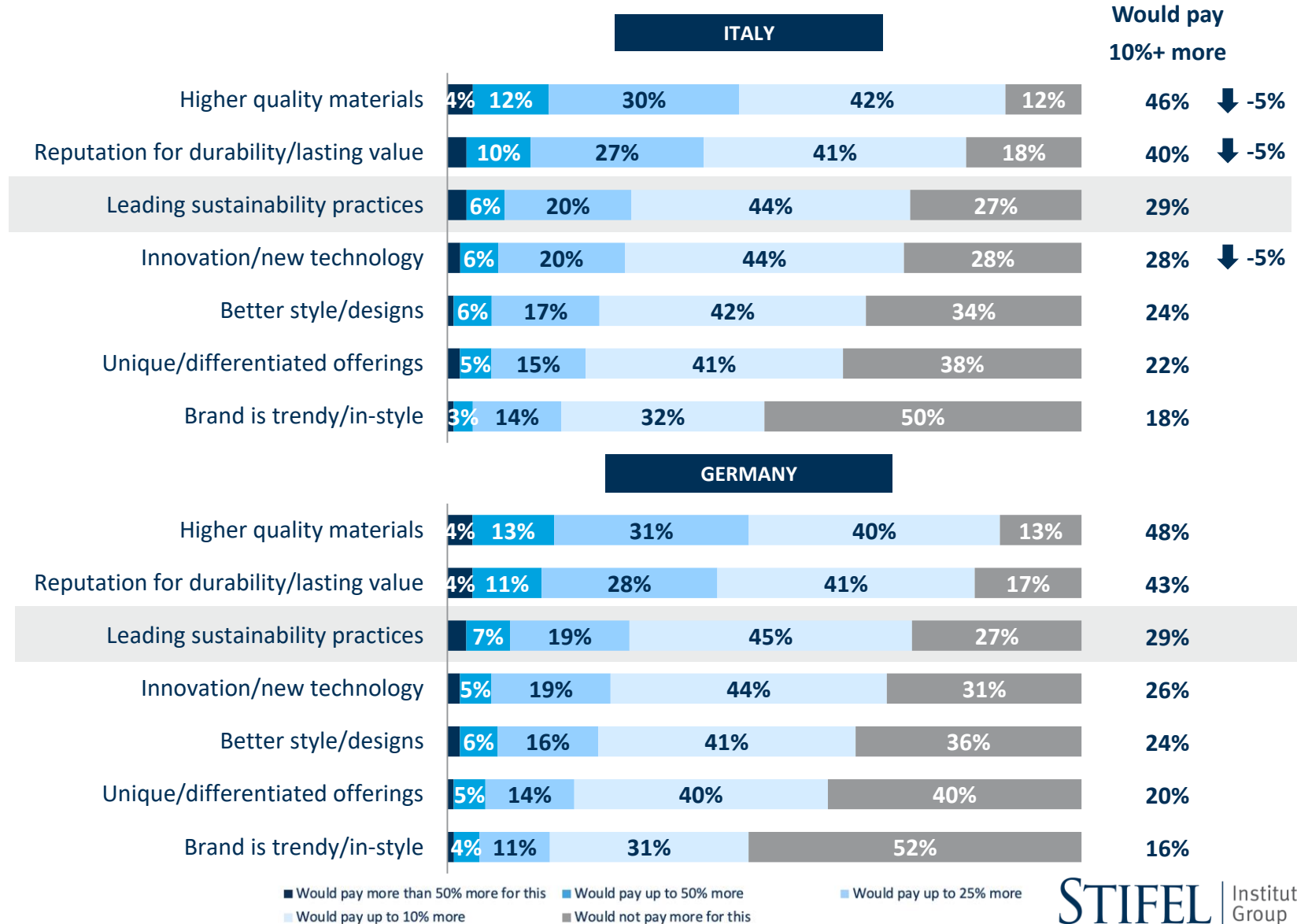
## WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



# In Italy and Germany, consumers are relatively more willing to pay for leading sustainability practices, though sustainability still falls behind quality and durability. Four of six markets report declining willingness to pay more for 3+ attributes.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following? Shown among Active/Casual Lifestyle Brand Purchasers

## WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS

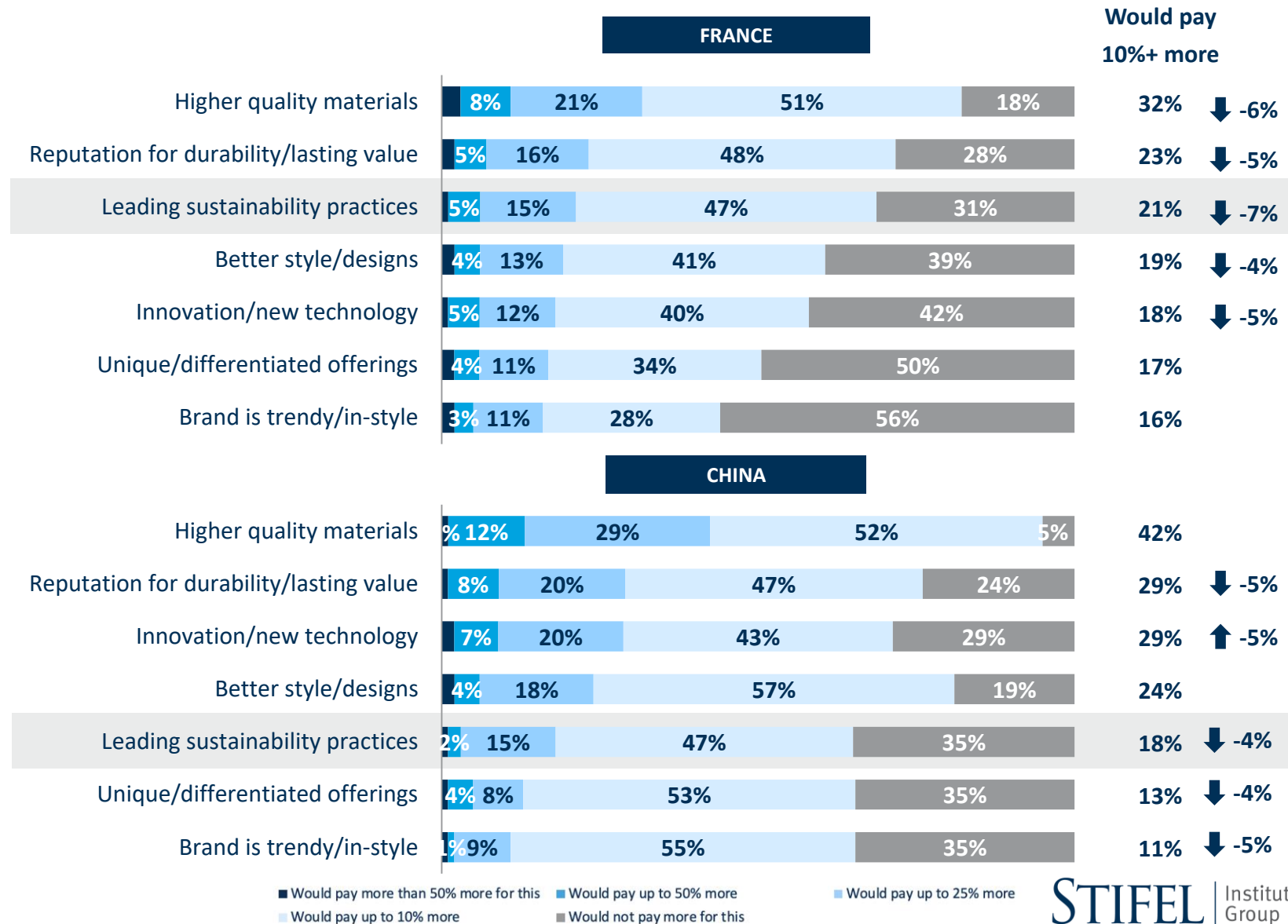




# French consumers are less likely to say they'd pay more for anything, and say they are as likely to pay more for leading sustainability as they would be for durability. Chinese consumers rate sustainability significantly behind innovation and style in willingness to pay more.

Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following? **Shown among Active/Casual Lifestyle Brand Purchasers**

## WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



# Across markets, consumers say they trying to be more sustainable day-to-day, and that they care more about the sustainability of what they buy. Over half in every market say they have purchased a new brand or product specifically because of that brands sustainability.

To what degree do you agree or disagree with the following statements? Shown among Active/Casual Lifestyle Brand Purchasers.

Showing % Strongly Agree + Somewhat Agree

## CONSUMER SUSTAINABILITY ACTIONS

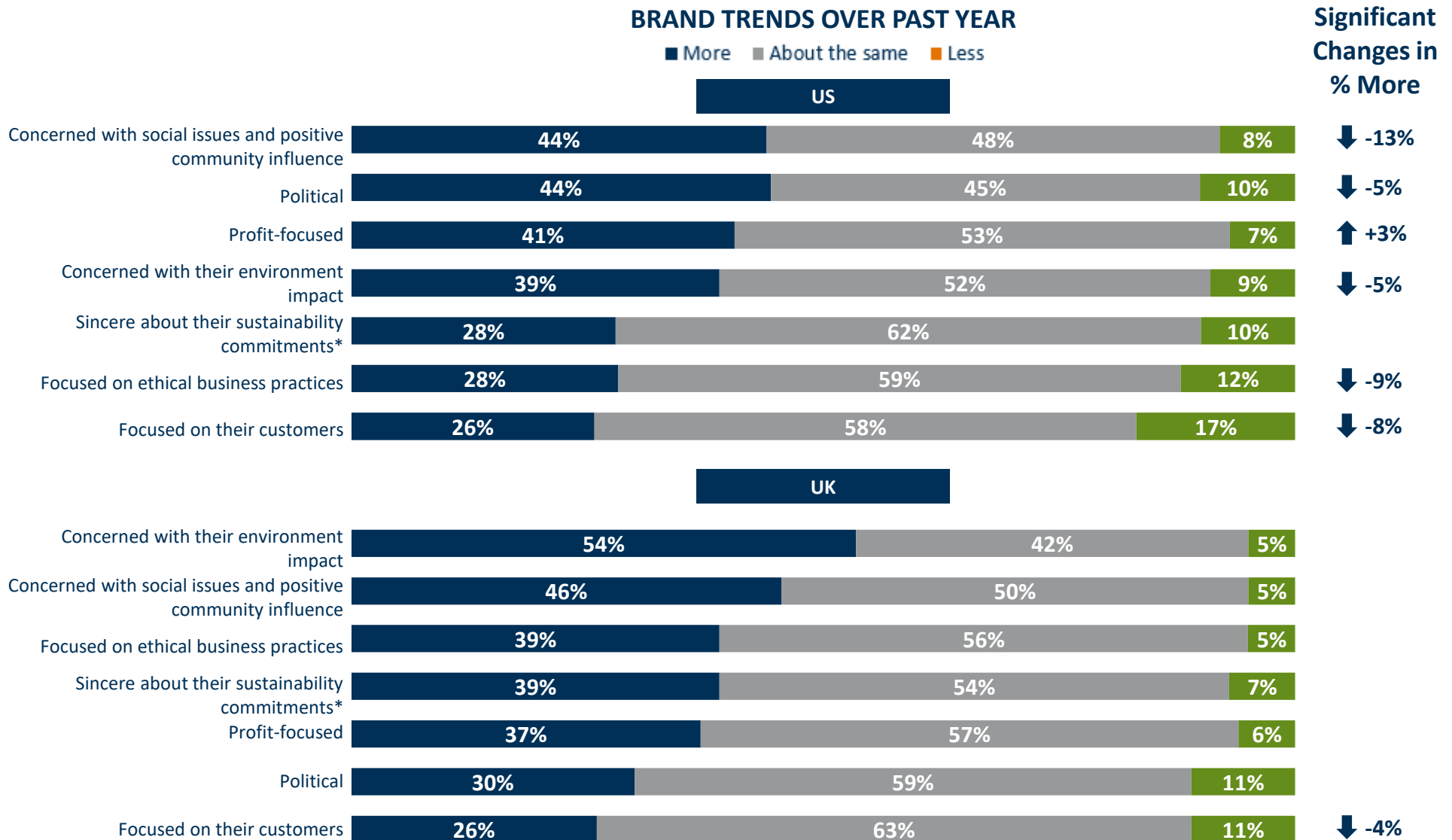
	US	UK	Italy	Germany	France	China
I am trying to be more sustainable in my day-to-day life	75% ↓-5%	82%	88%	82%	83%	88%
I care more now about the sustainability of products I buy than I did a year ago	67% ↓-4%	76%	77%	70%	74%	80%
I regularly consider pre-owned, second-hand, or refurbished goods when shopping (i.e., consignment, thrift shopping etc.)*	63%	67%	56%	55%	71%	39%
I have purchased a new brand/product specifically because of their sustainability practices	58% ↓-3%	56%	62% ↓-5%	55%	63% ↓-8%	69%
I intend to purchase fewer products for the sake of sustainability	58%	69%	68% ↑+5%	66%	73%	62% ↓-7%
I try to learn about a brand's sustainability practices before I buy it for the first time	54% ↓-5%	54% ↓-5%	68%	61%	66%	74%
I regularly opt for more expensive brands or products because they are more sustainable	47% ↓-5%	50%	45%	51%	58%	49% ↑+7%
I have boycotted or stopped buying a brand/product specifically because of its sustainability (or lack thereof)	41% ↓-5%	45%	53%	53%	56%	61%
I regularly consider renting goods or clothing instead of buying*	34%	33%	33%	31%	36%	17%

\* Item added in 2022 survey; no tracking available

Blue shading indicates top 3 action in each market

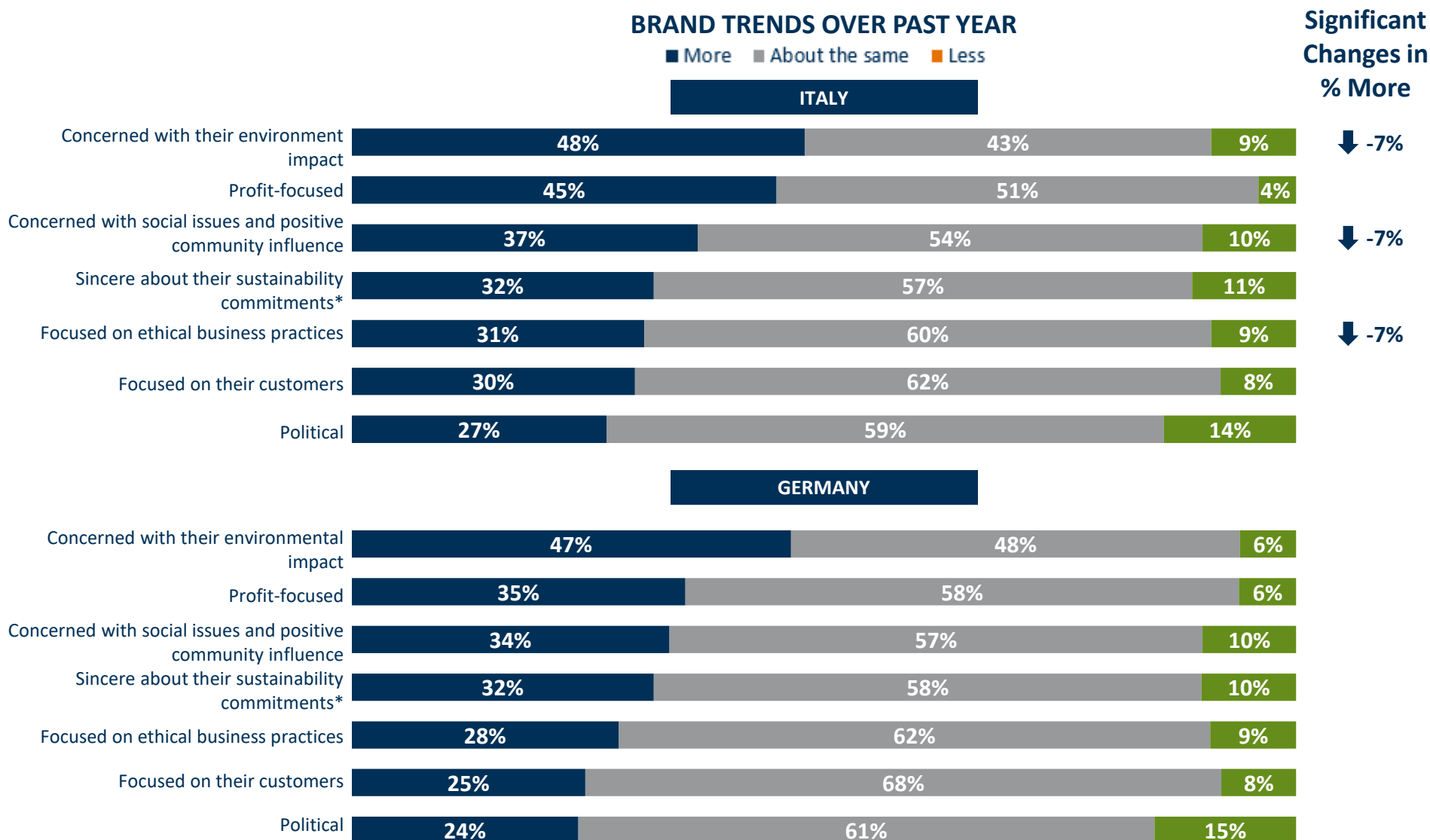
# Three markets (US, Italy, and France) report significant decreases in the rates of consumers saying that brands are becoming more concerned with social issues, environmental impact, and ethical business practices.

Over the past year, have brands become more or less... Shown among Active/Casual Lifestyle Brand Purchasers.



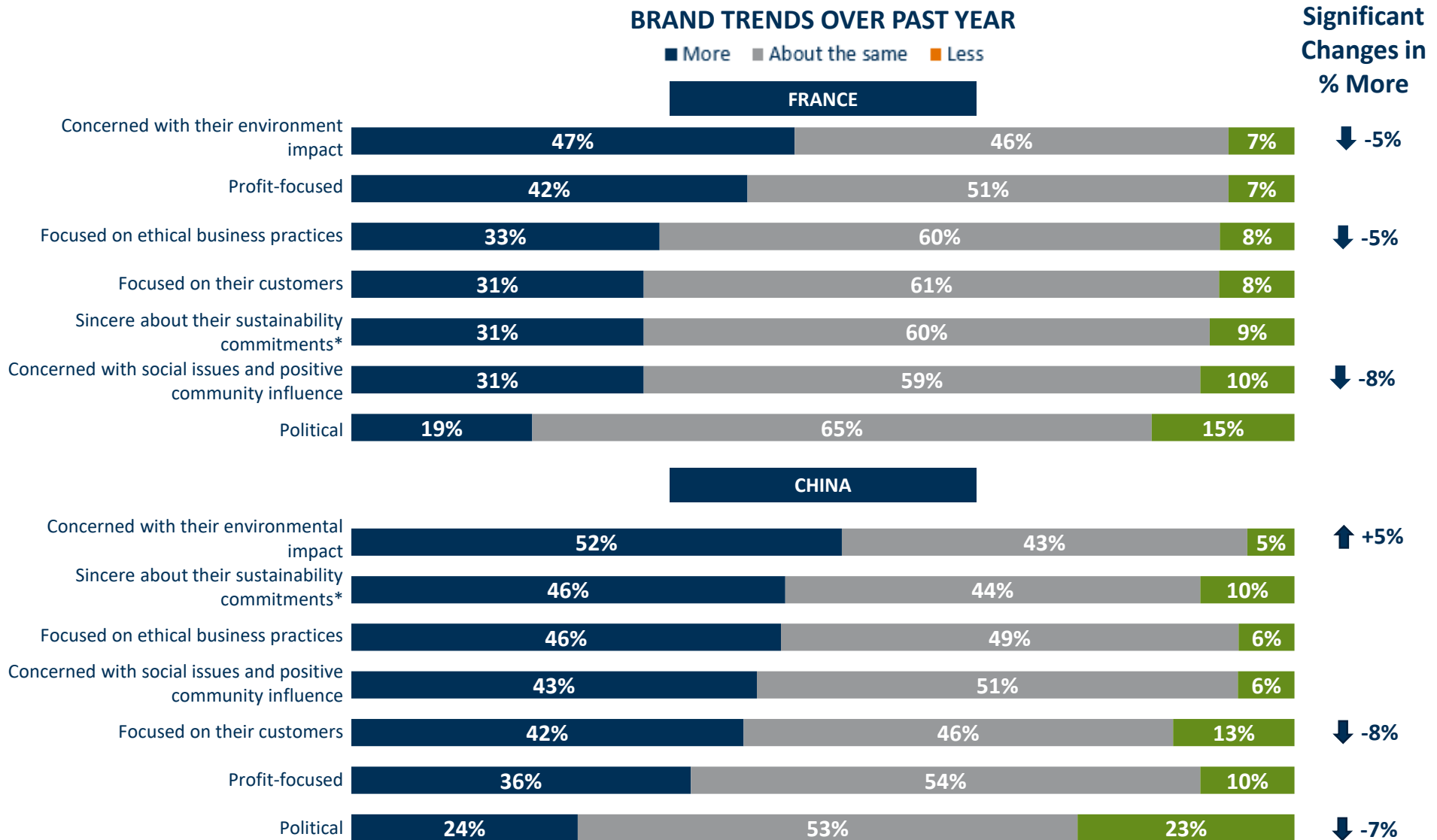
# Almost half of consumers in all non-US markets say that companies are becoming more concerned with their environmental impact; in these non-US markets, this is the highest scoring attribute on this metric.

Over the past year, have brands become more or less... Shown among Active/Casual Lifestyle Brand Purchasers.



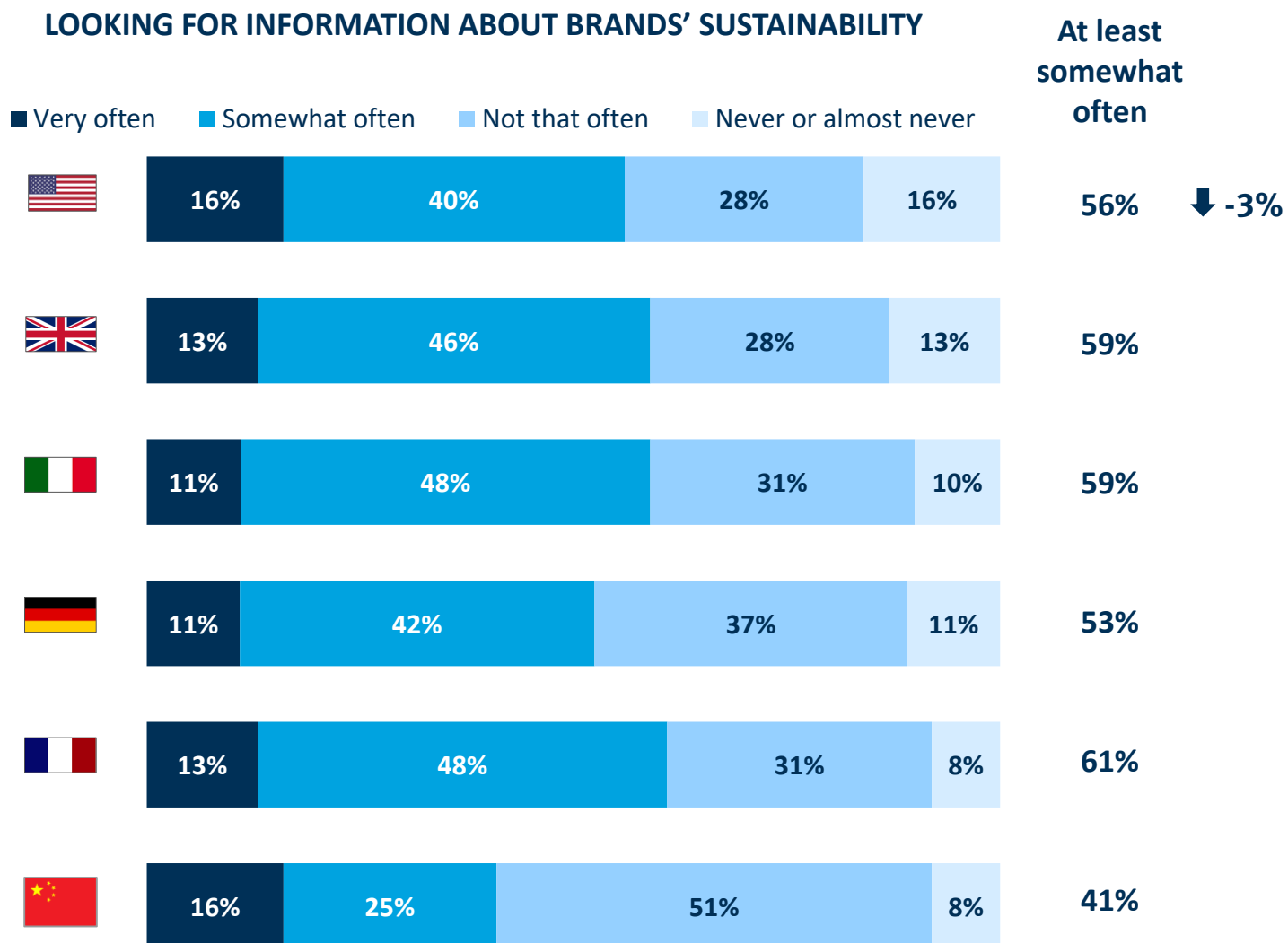
# Nearly half of Chinese consumers say that companies are becoming more sincere about their sustainability commitments; in contrast, this doesn't exceed one in three in Italy, Germany, France, or the US.

Over the past year, have brands become more or less... Shown among Active/Casual Lifestyle Brand Purchasers.



# At least half of consumers in all markets except China look for information about a brand's sustainability practices at least somewhat often. This ticked downwards in the US, but remained about steady in other markets.

How often do you look for information about a brand's sustainability practices when deciding whether to buy a product from that brand?  
Shown among Active/Casual Lifestyle Brand Purchasers.



## S Appendix

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## Sustainability Index Score – Brands Included

*We measured sustainability perceptions for 50 total brands:*

Adidas	Champion	Jordan	Playboy	Sperry
Allbirds	Columbia	Keen Footwear	prAna	Supreme
Arcteryx	Converse	Lee	Puma	The North Face
Asics	Crocs	Levi's	Reebok	Timberland
Athleta	Duluth Trading	lululemon	Rhone	UGG
Birkenstock	Fabletics	Merrell	Rothy's	Under Armour
Bombas	Hanes	New Balance	Salomon	Vans
Brooks	Hey Dude	NIKE	Saucony	Vuori
Canada Goose	Hoka One One	On Running	Skechers	Wrangler
Carhartt	HydroFlask	Patagonia	Smartwool	YETI