



Sustainability Survey Report of Key Findings

December 2023

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Survey Methodology

Morning Consult conducted n=11,551 online interviews among General Population adults ages 18-55 and Active/Casual Lifestyle Brand Purchasers ages 18-55 in the US, UK, Italy, Germany, and France from October 23– 30, 2023. 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, and France.

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=1,006	+/- 3%	N=6,053	+/- 1%
UK	N=1,002	+/- 3%	N=1,039	+/- 3%
Italy	N=1,002	+/- 3%	N=1,044	+/- 3%
Germany	N=1,000	+/- 3%	N=1,068	+/- 3%
France	N=1,000	+/- 3%	N=945	+/- 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 2022 iteration of this survey, conducted in the same five markets from April 15 – 25, 2022. This survey used an identical methodology and had extremely similar sample sizes and questions. All statistical significance testing is conducted at the 95% confidence level. The “Social Issues” section was only asked in the 2023 iteration of this study, among General Population adults and Active/Casual Lifestyle Brand Purchasers who did not receive the “Sustainable Brand Index” section. For any questions about methodology or the 2022 survey, please contact the Stifel or Morning Consult teams.

Key Survey Findings

In the United States, most active/casual lifestyle brand consumers (80%) agree it is important for brands to focus on improving their sustainability practices, and many regularly consider and value sustainability when they shop these categories. Indeed, emphasis on sustainability holds steady compared to 2022, despite larger concerns around the state of the economy or personal finances.

- Four in five US category consumers say it is important for brands to operate sustainably, including almost two in five (38%) who say it is “very important,” representing a +2ppt y/y increase from 2022.
 - Ethical business practices continue to be top-of-mind to US consumers, with over half (58%) saying they are “very important” for brands to prioritize. When asked to rank individual sustainability priorities for brands, and in continuity from last year, 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.
- US consumers display similar rates to last year regarding willingness to pay for “sustainability practices,” despite inflationary pressures and increased focus on low price
 - Most US consumers (80%) report trying to be more sustainable in their day-to-day life (+3ppts y/y), 70% care more now about sustainability of products than they did a year ago (+3ppts y/y), and 49% regularly choose more expensive products for the sake of sustainability (+2ppts y/y)
 - This data comes at a time where just under two in three (62%) consumers report to be more concerned about the state of the economy this year compared to last year, and over a majority (56%) say they are more concerned about their personal finances.

Globally, a large share of consumers across markets prioritize sustainability, though with directionally lower indications of willingness to research and spend on leading sustainability practices compared to 2022

- Across all markets, at least four in five active/casual lifestyle brand purchasers continue to say it’s important that brands operate with environmental sustainability, social sustainability, and ethical business practices.
- Italy and Germany both experienced a significant decline among consumers in willingness to pay more for brands with leading sustainability practices, seeing a -5ppt y/y and a -3ppt y/y decrease from 2022, respectively. US consumers lead the competitive set in their willingness to pay more for these practices, at 27%.

Brand stances on hot-button social issues require deep understanding of the consumer base and careful calculation. We believe brands need deep understanding of their consumer base to assess reward vs. the risks of being outspoken on controversial topics.

- Two in three US consumers report to have heard of a brand which received negative backlash on social media for a statement or action taken on a social issue. Half of category purchasers have boycotted a brand this year or in the past, and only one in four would not consider boycotting.
- When asked what they preferred, about three in five US consumers state that they would rather a brand stay out of social issues entirely, than to make a statement which they disagree with. If a brand does make a statement which consumers disagree with, only one in three say that it would not affect the trust that they have for the brand.

S **US Key Findings**

About four in five Americans say it's important for brands to focus on operating sustainably. Category purchasers are likelier to view sustainability as important than the general population

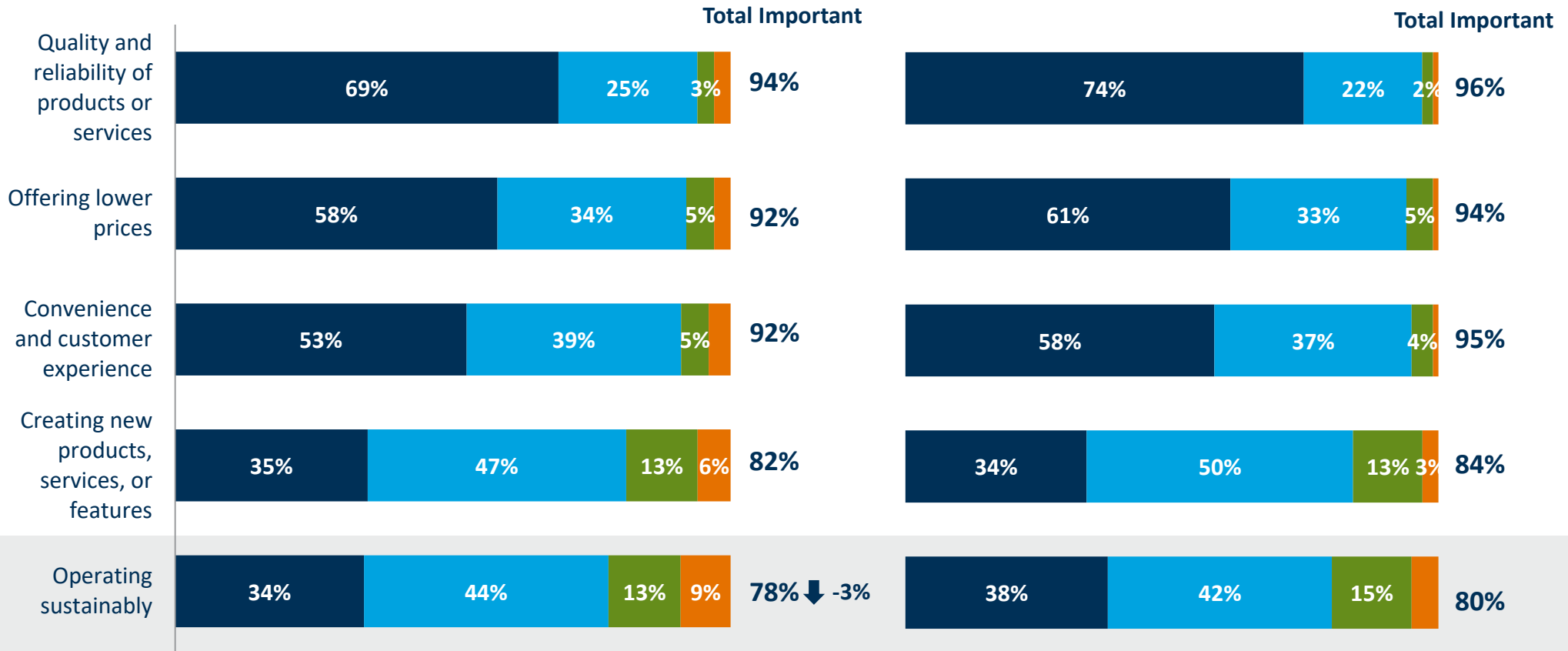
Broadly, how important is it to you that brands focus on the following? Note: Operating Sustainably was presented as: "Operating sustainably (i.e., with focused attention to their impact on the environment, employees/workers, and communities)"

BRAND PRIORITIES

GENERAL POPULATION

ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

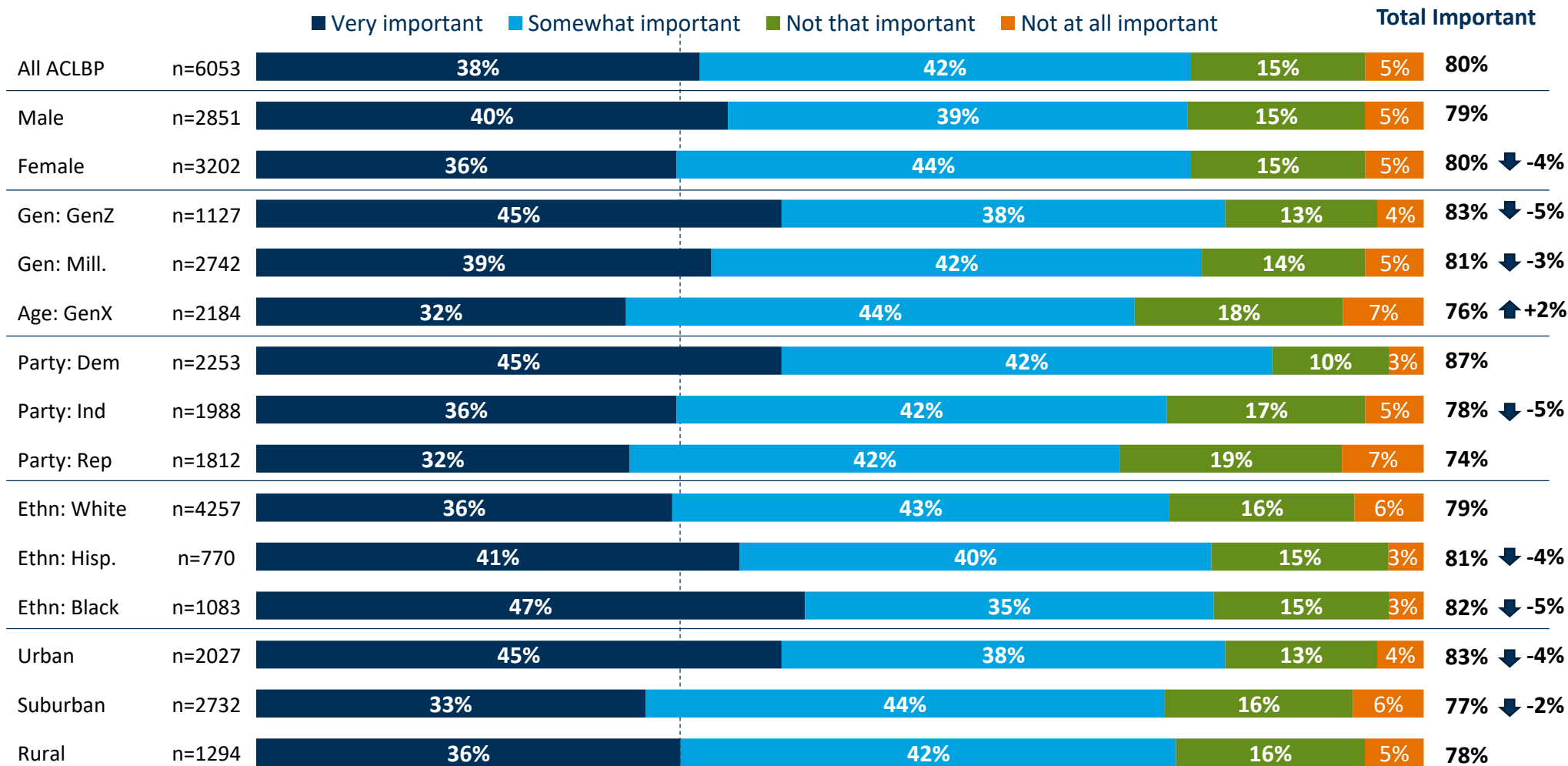
■ Very important ■ Somewhat important ■ Not that important ■ Not at all important



Younger, Democrat, Black, Hispanic, and urban ACLBP consumers continue to be more likely than their counterparts to say it's 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.

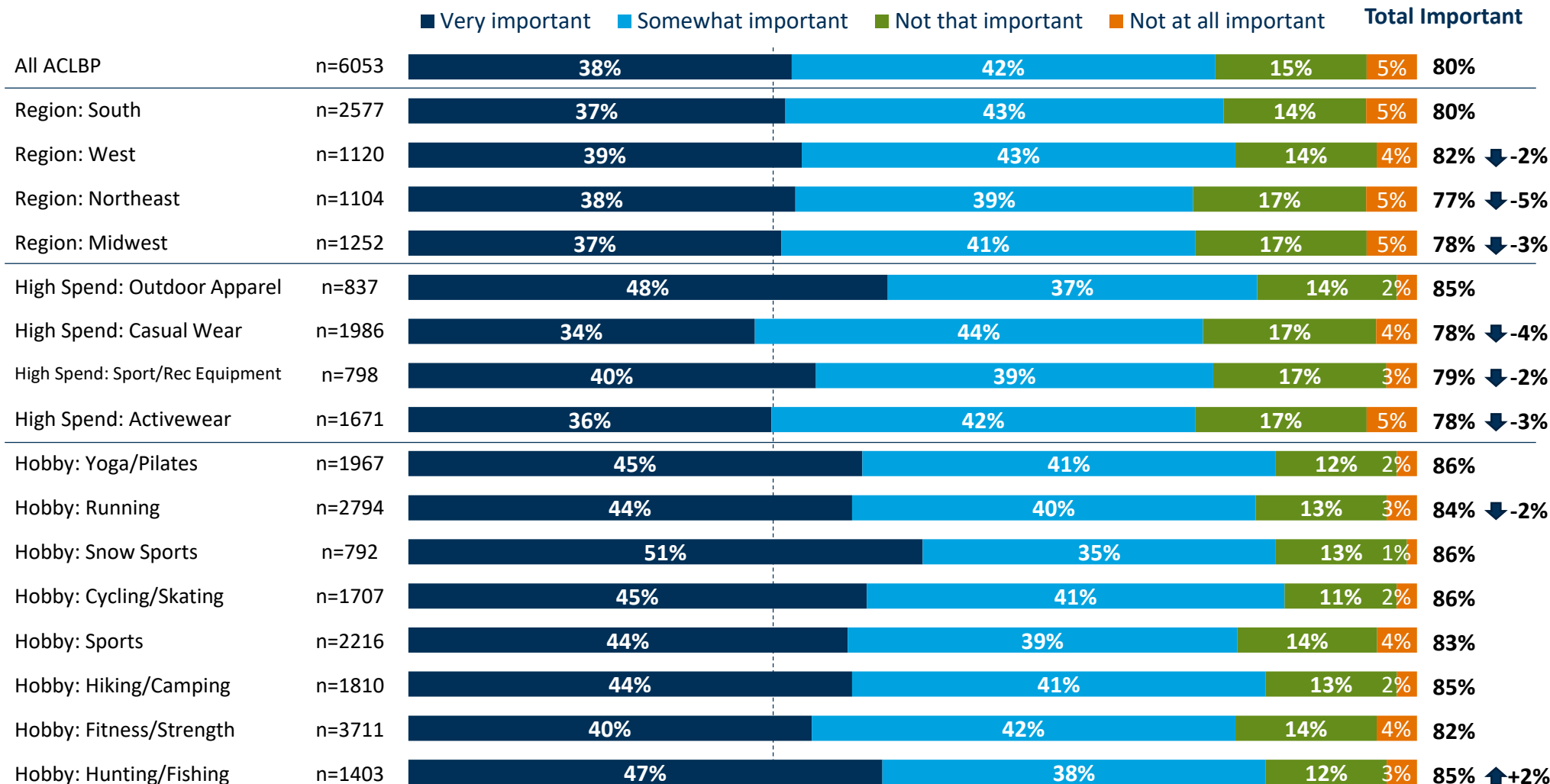
BRAND PRIORITIES: OPERATING SUSTAINABLY



Other demographic groups that prioritize brands operating sustainably are higher spenders on outdoor apparel and those who enjoy more active hobbies like yoga, cycling, or snow sports

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: OPERATING SUSTAINABLY



Large majorities of ACLBP consumers agree that brands should operate within all three pillars of sustainability, with ethical business practices most likely to be seen as “very important.” Socially sustainable practices also see an uptick in support compared to 2022

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

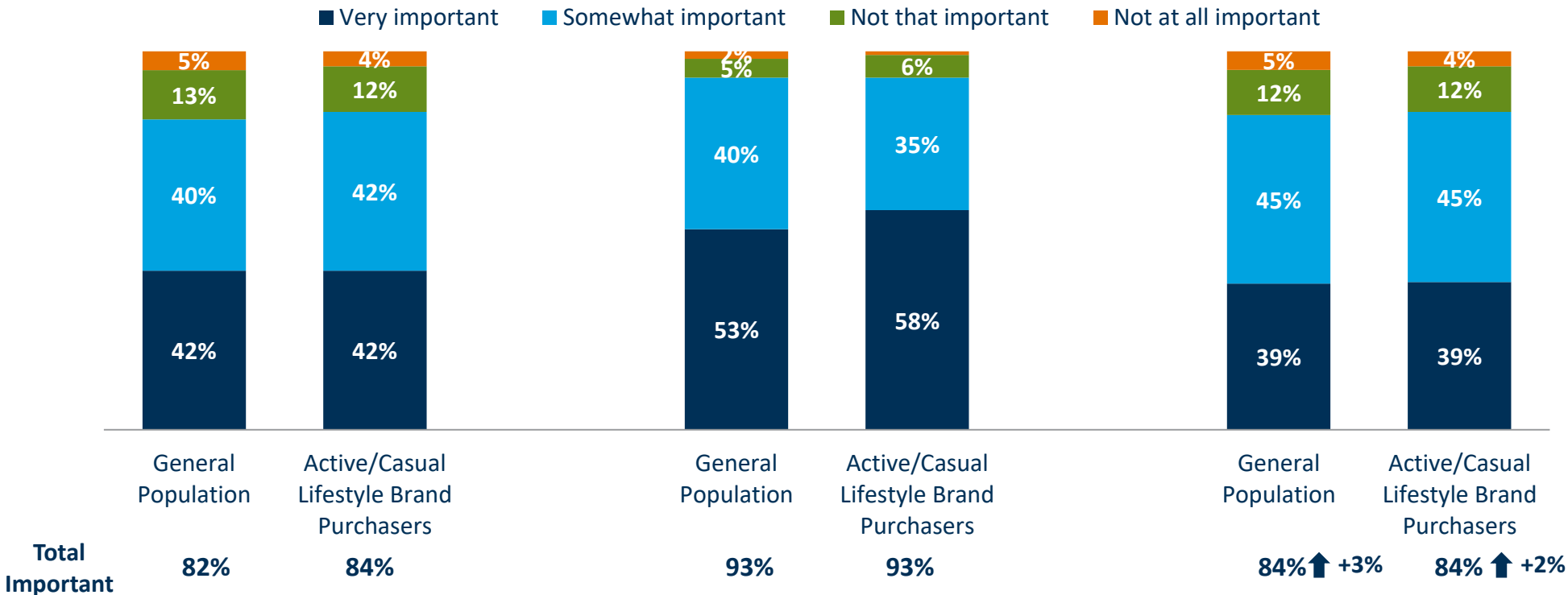
Respondents saw: For the purposes of this survey, **environmental sustainability** refers to environmentally responsible business operations, such as cutting carbon emissions, using renewable or recyclable materials, preventing pollution, using less packaging, using less energy and water, etc.

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.



Ethical business priorities like fair pay, paying their fair share of taxes, and work/life balance remain the top brand sustainability priorities for the third year in a row, emphasized in comparison to specific environmental and social sustainability priorities

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

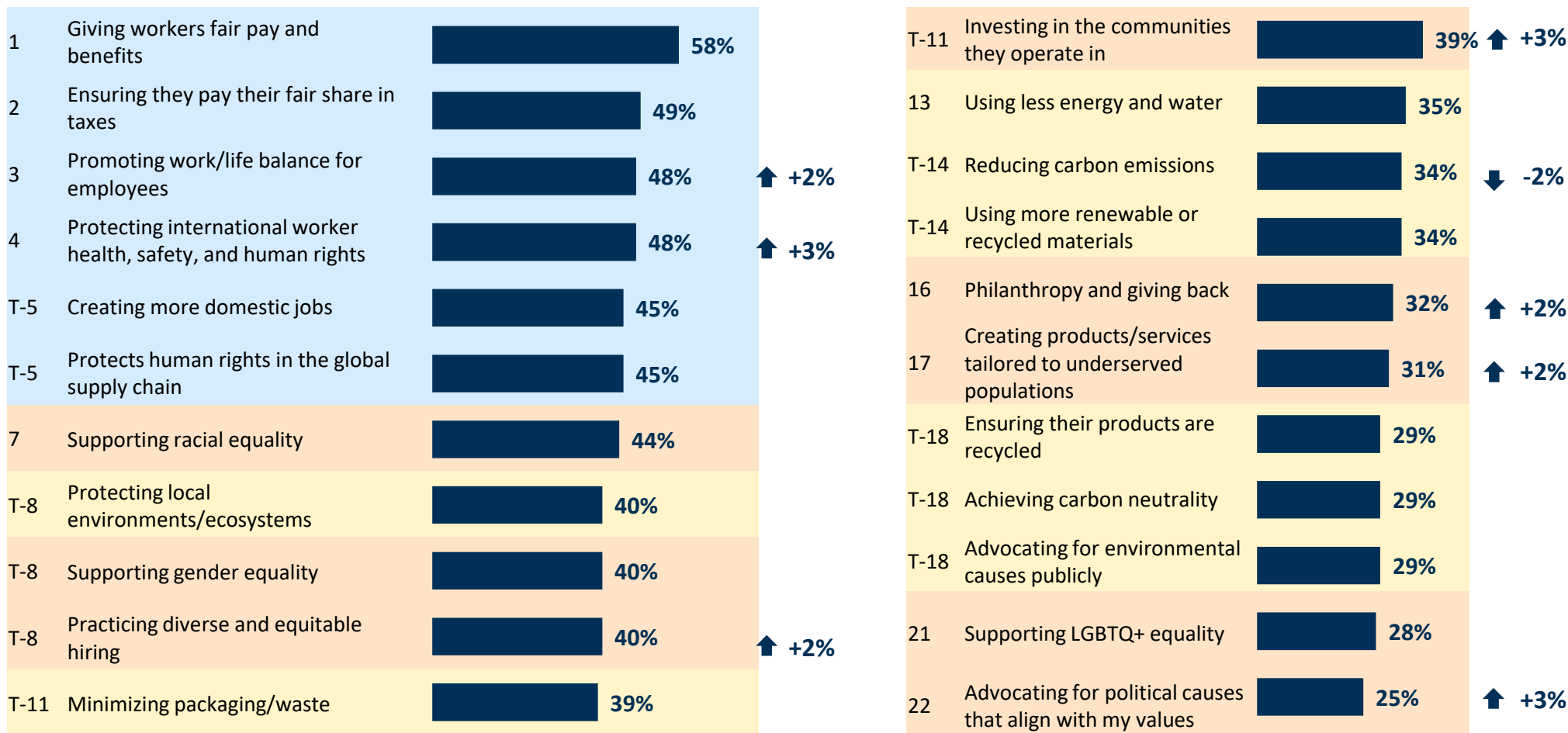
SUSTAINABILITY PRIORITIES FOR BRANDS

Environmental Priorities

Ethical Business Priorities

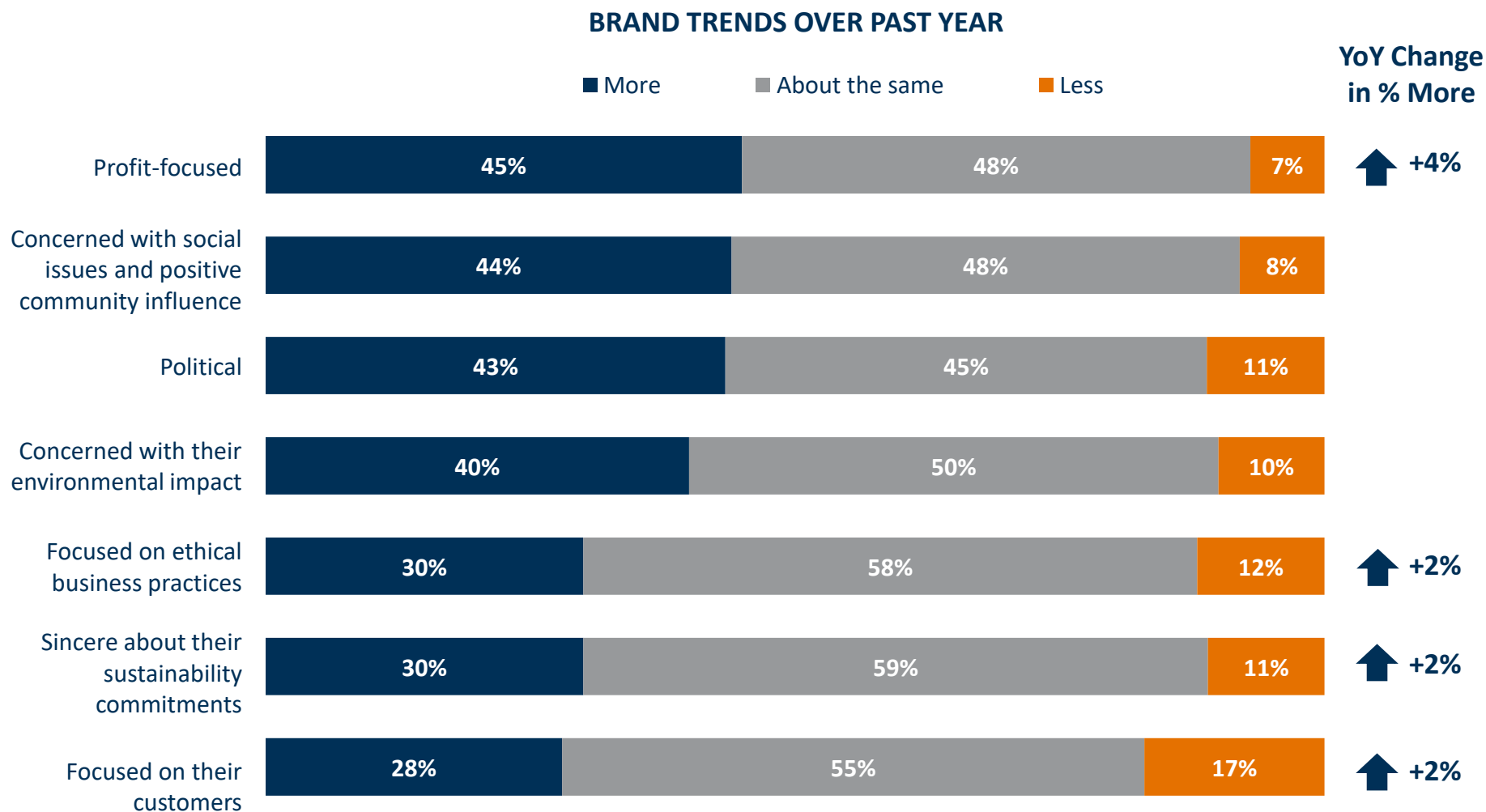
Social Priorities

Showing % "Very Important"



Consumers perceive brands to be increasingly profit-focused following three years of above trend inflation rates, with 45% of category purchasers believing brands are becoming more profit focused, vs. 41% in 2022 and 38% in 2021

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



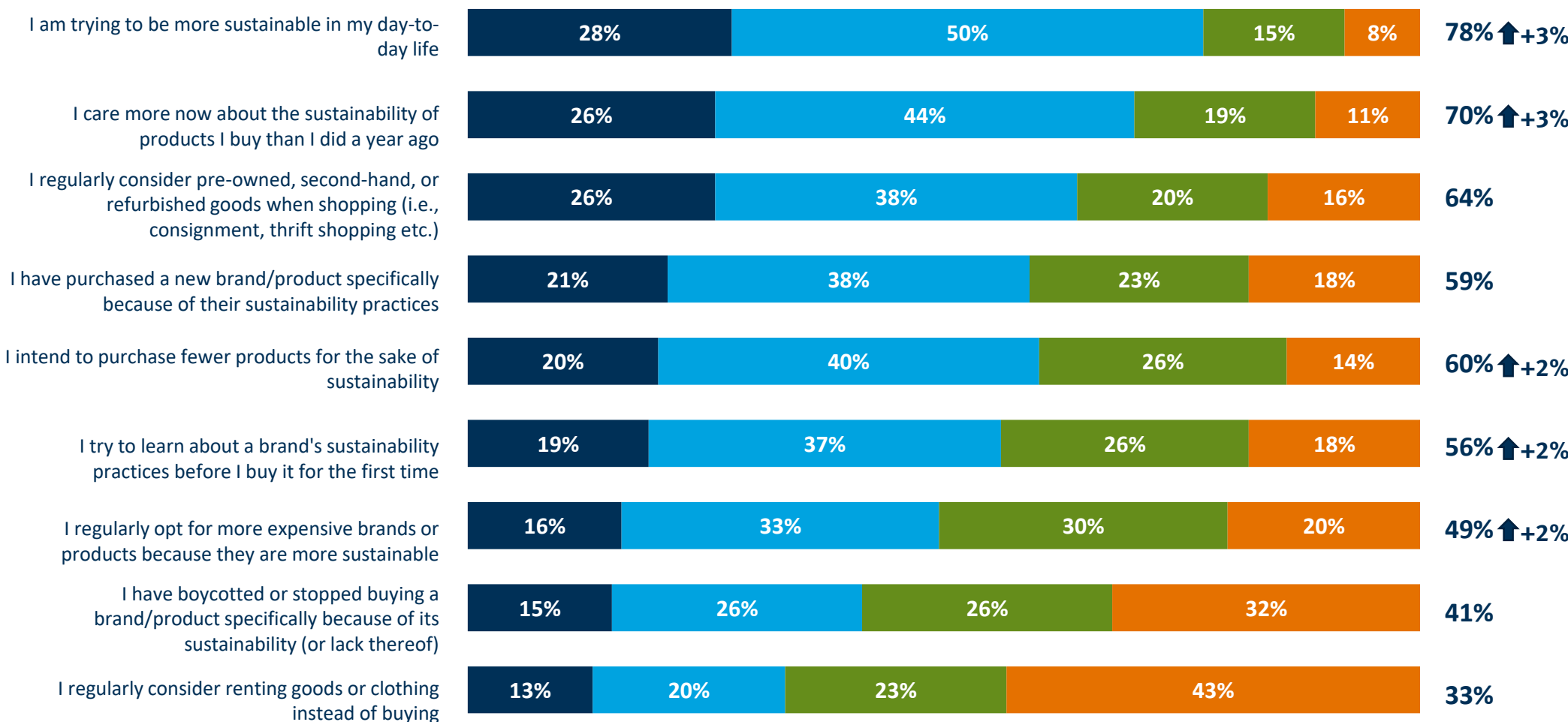
Nearly four in five consumers are trying to be more sustainable in their day-to-day lives, and seven in ten care more about sustainability than a year ago, both measures increased +3ppts y/y, the largest increase among all consumer sustainability actions

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

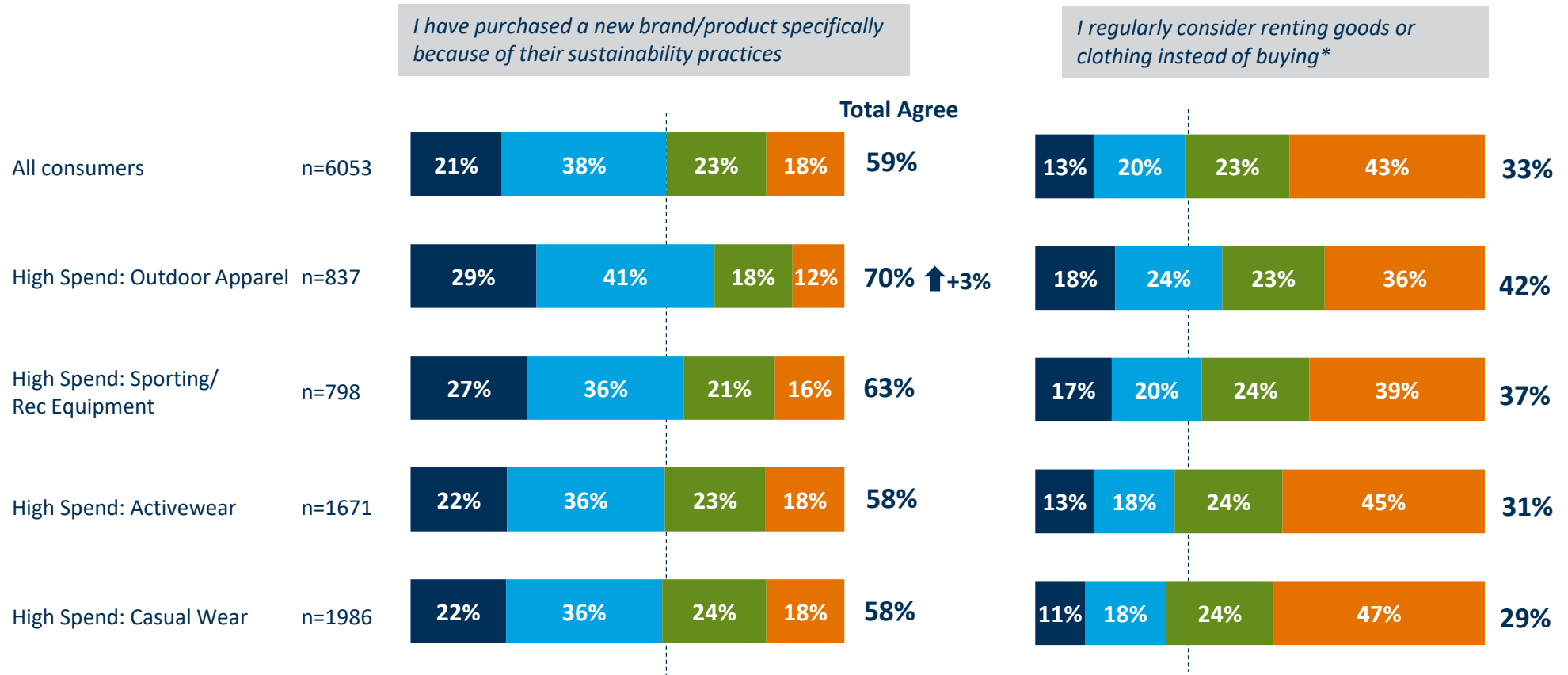


Those who spend more on outdoor apparel continue to be more attracted to brand sustainability actions, with a +3ppts y/y increase to seven out of ten having purchased a new brand or product specifically because of sustainability practices

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

CONSUMER SUSTAINABILITY ACTIONS

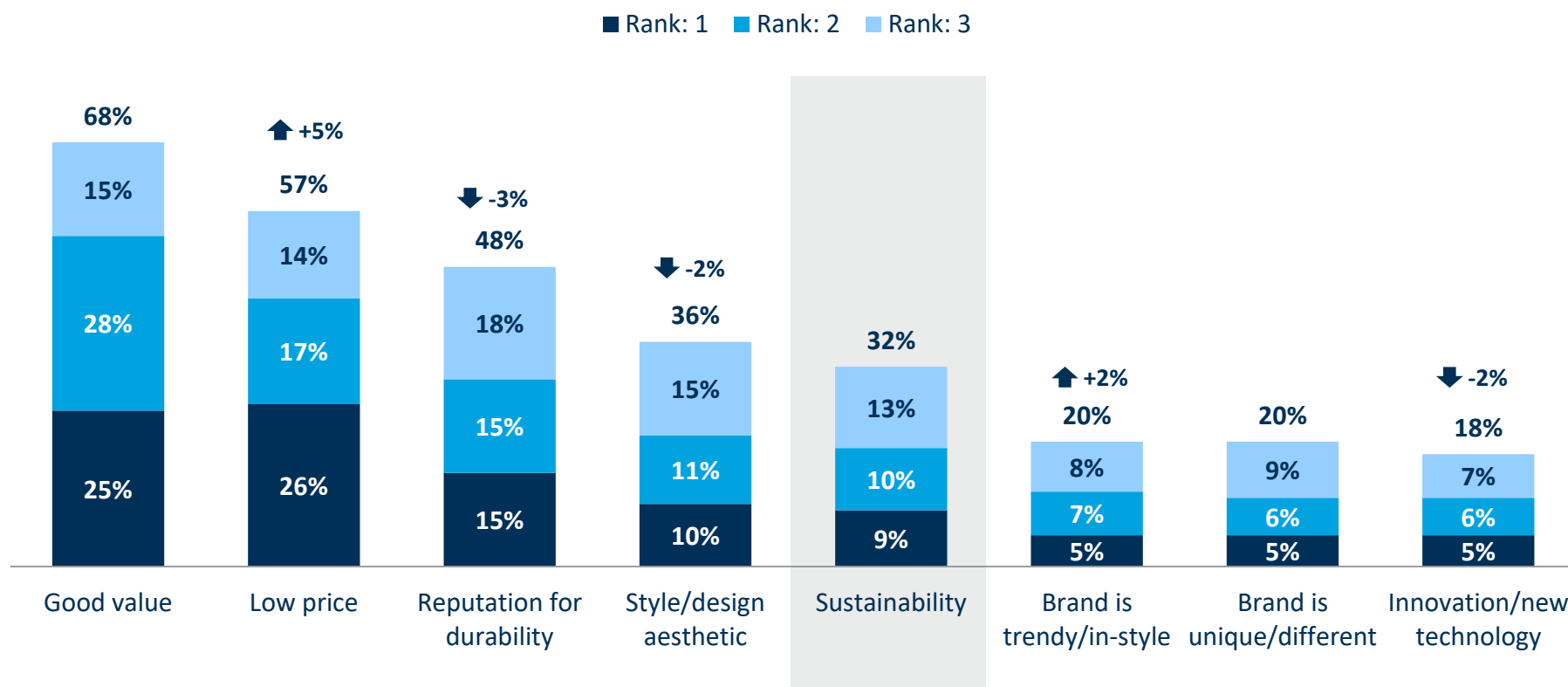
■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree



Almost one in three ACLBP consumers say sustainability is an important factor when shopping for these products. “Low price” has become an increasing priority, with a +5ppt y/y increase in purchasing priority to 57%, following only “good value” as a top three purchasing factor

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

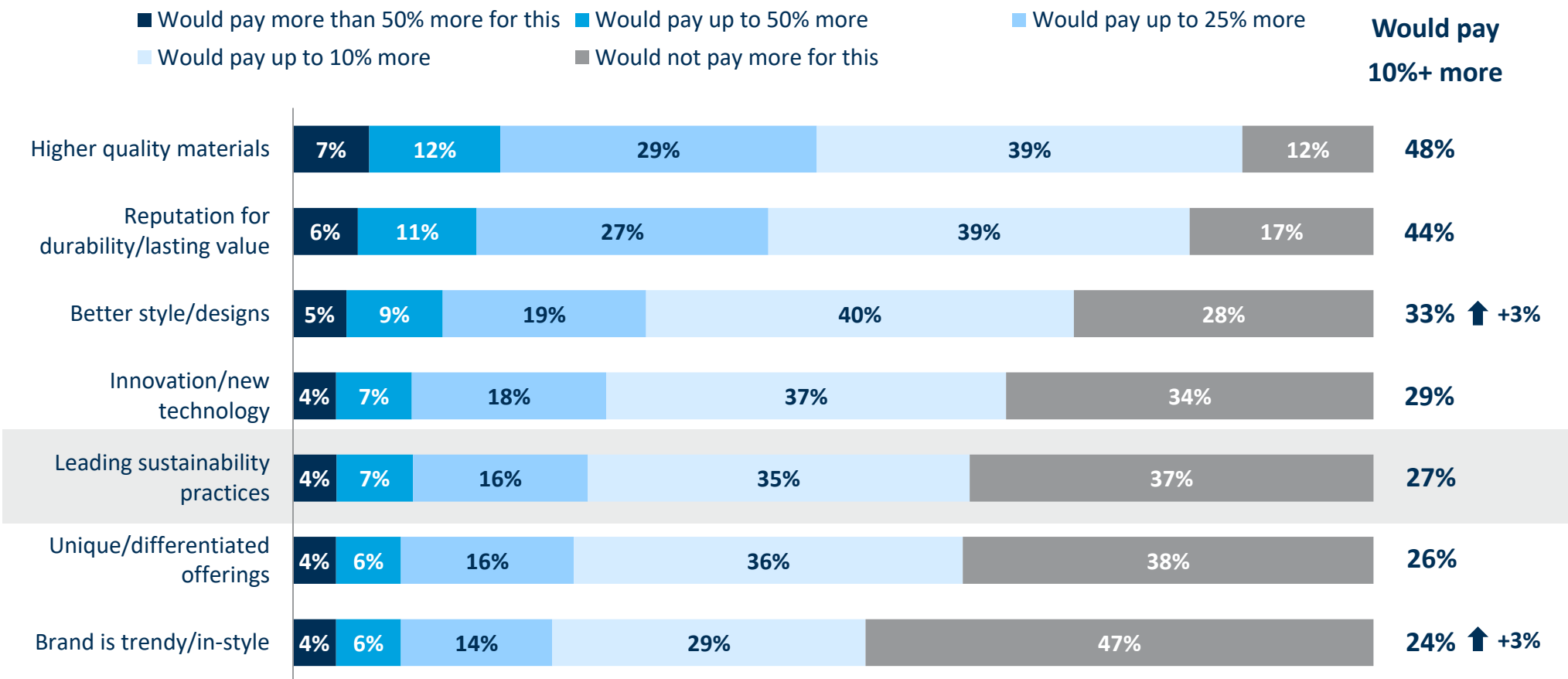


Just over one in four ACLBP consumers say they would pay over 10% more for a brand with leading sustainability practices, with nearly two-thirds willing to spend a premium for leading sustainability practices

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

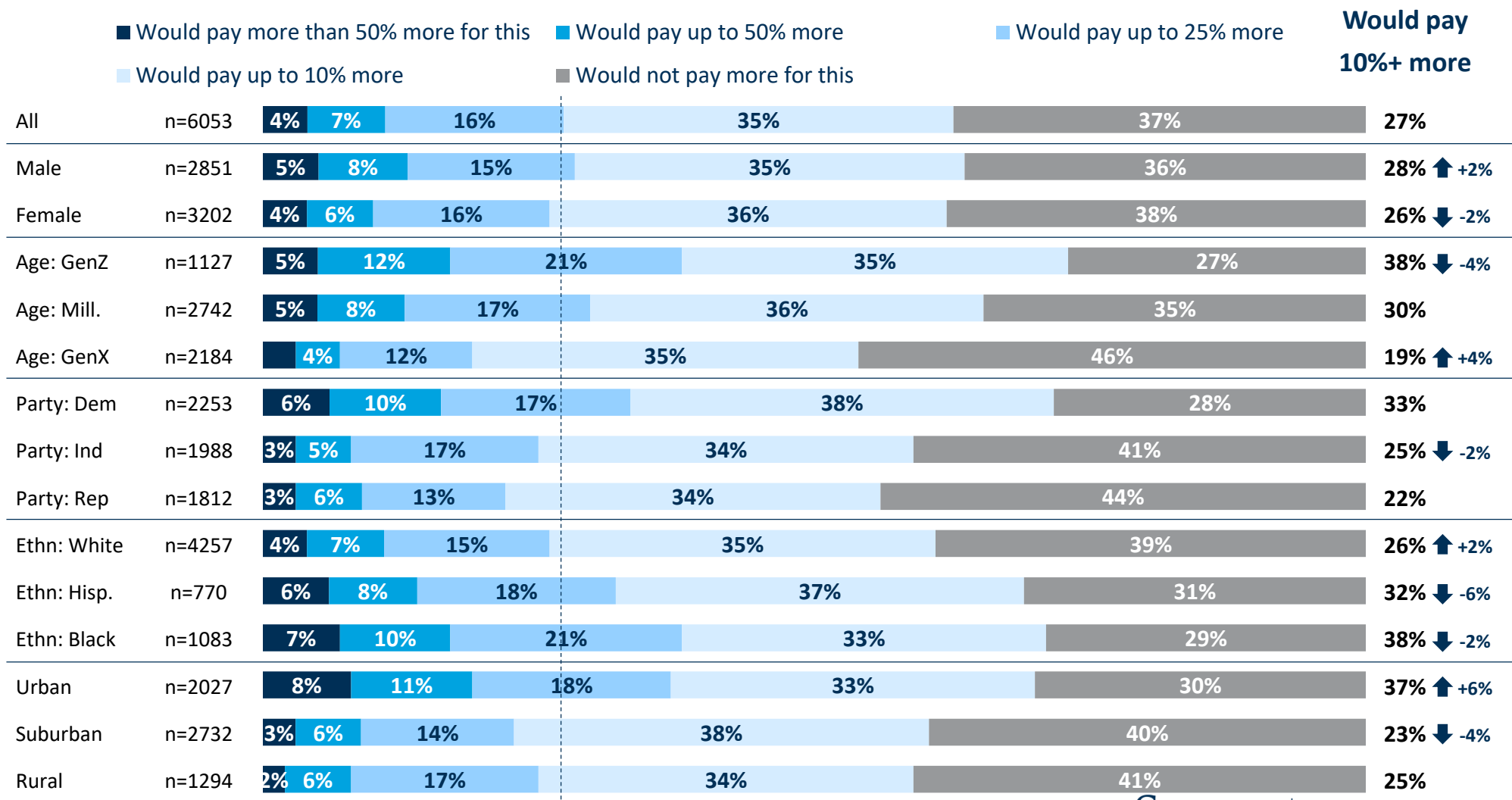
WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



While younger, Democratic, and Black consumers are all still more likely than their counterparts to pay more for leading sustainability practices, willingness to pay more increased y/y amongst urbanites, Gen Xers, white consumers, 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?

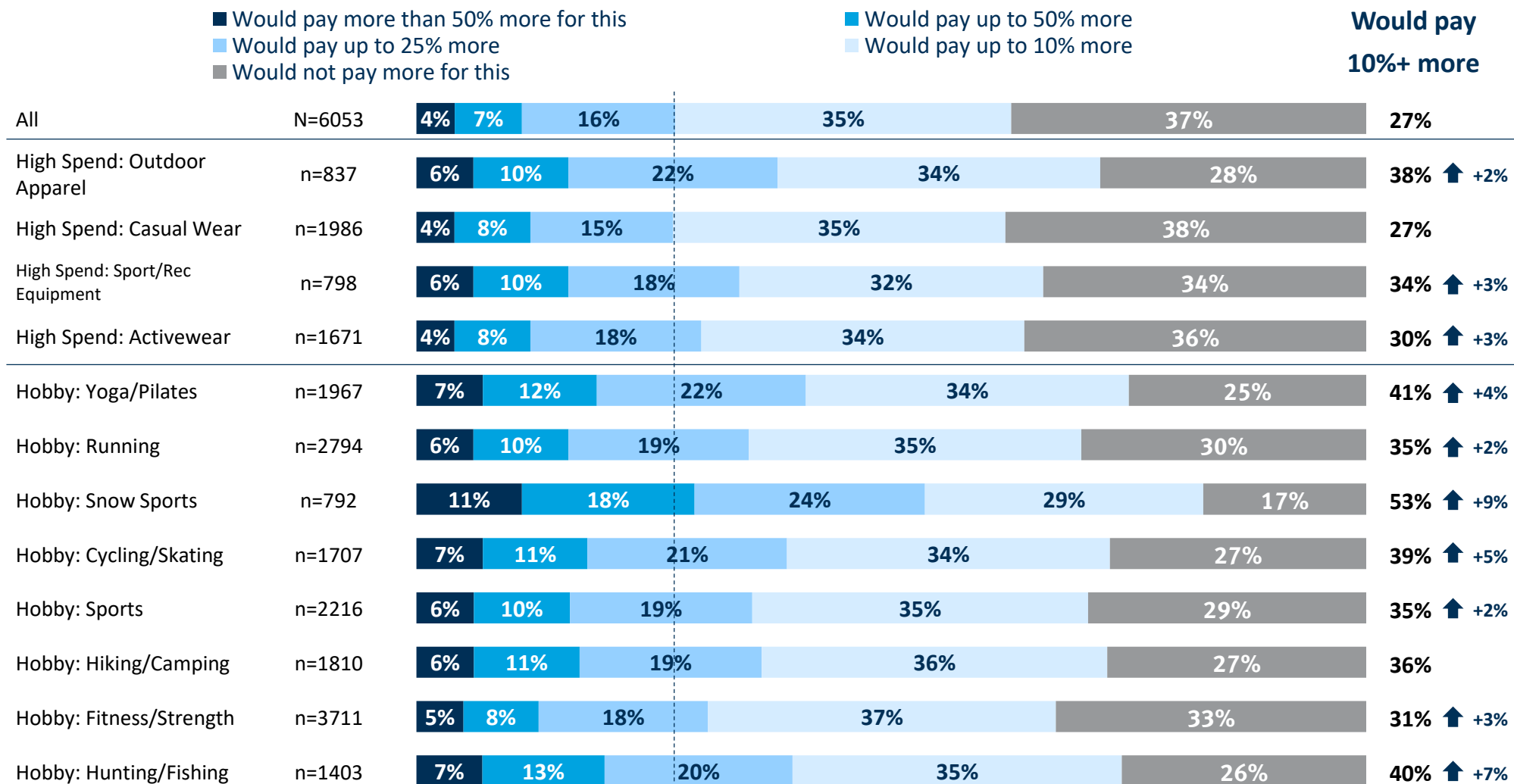
WILLINGNESS TO PAY MORE FOR “LEADING SUSTAINABILITY PRACTICES”



Willingness to pay is up from last year among all of those with an active hobby, with the greatest increases coming from those who do snow sports, hunters, and cyclists

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”

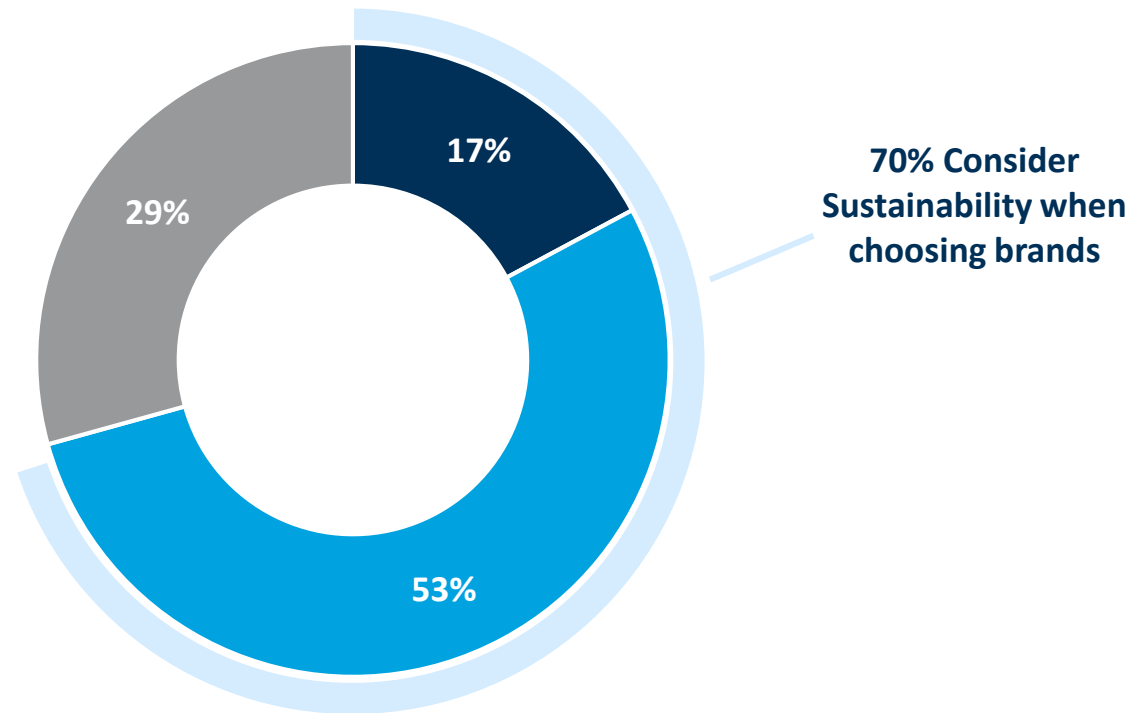


Seven in ten consumers still say they consider sustainability when choosing between brands

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

SUSTAINABILITY'S ROLE IN BRAND DECISIONS

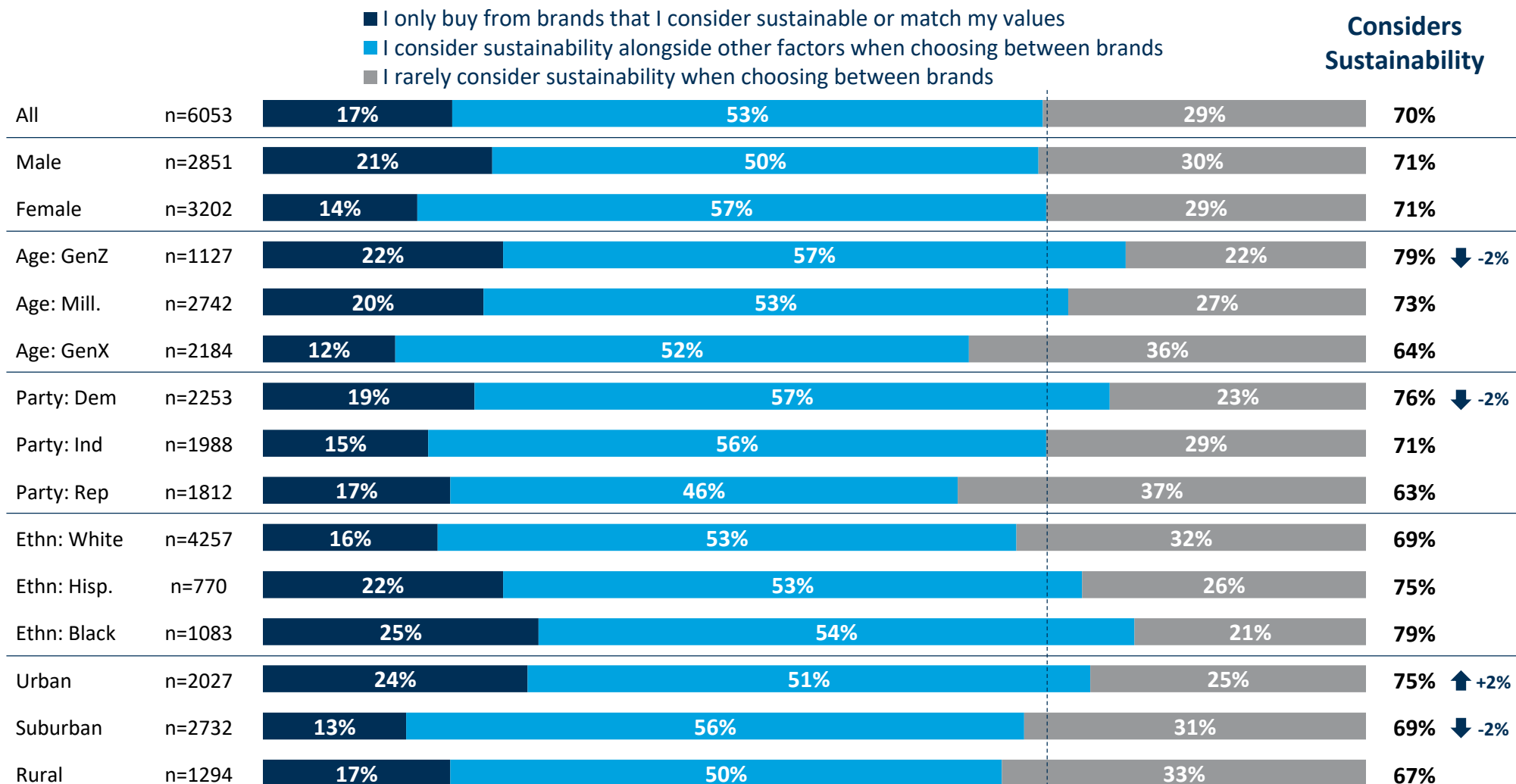
- I only buy from brands that I consider sustainable or match my values
- I consider sustainability alongside other factors when choosing between brands
- I rarely consider sustainability when choosing between brands



Younger consumers, Democrat, and Black and Hispanic consumers are more likely than their counterparts to consider sustainability when choosing between brands, though Democrats and GenZers are less likely to do so compared to 2022

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

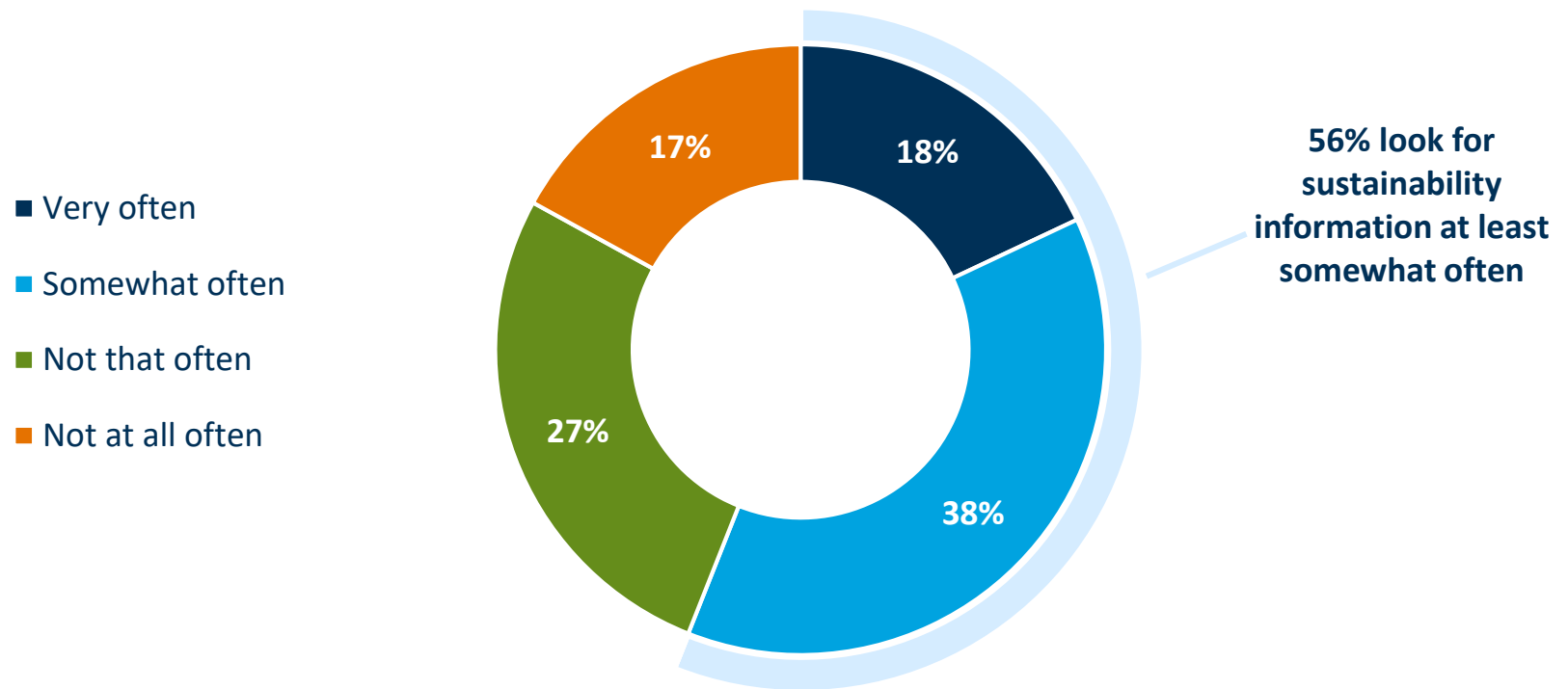
SUSTAINABILITY'S ROLE IN BRAND DECISIONS



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?

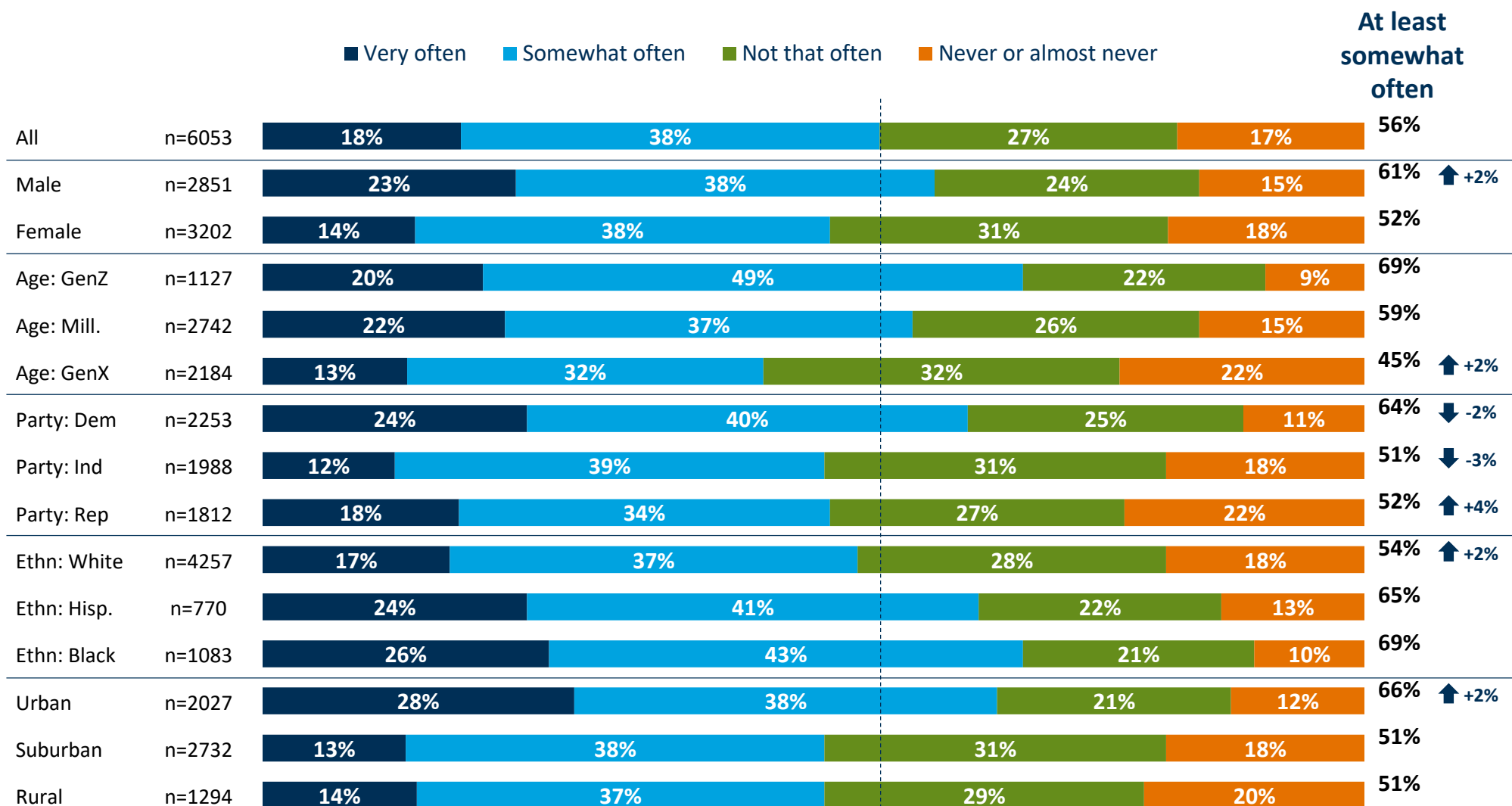
LOOKING FOR INFORMATION ABOUT BRANDS' SUSTAINABILITY



Males, younger consumers, Democrats, Hispanic and Black Americans, and urbanites remain more likely than their counterparts to look for information about different brands when making purchase decisions; Men and urbanites see a lift in their rates compared to last wave

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



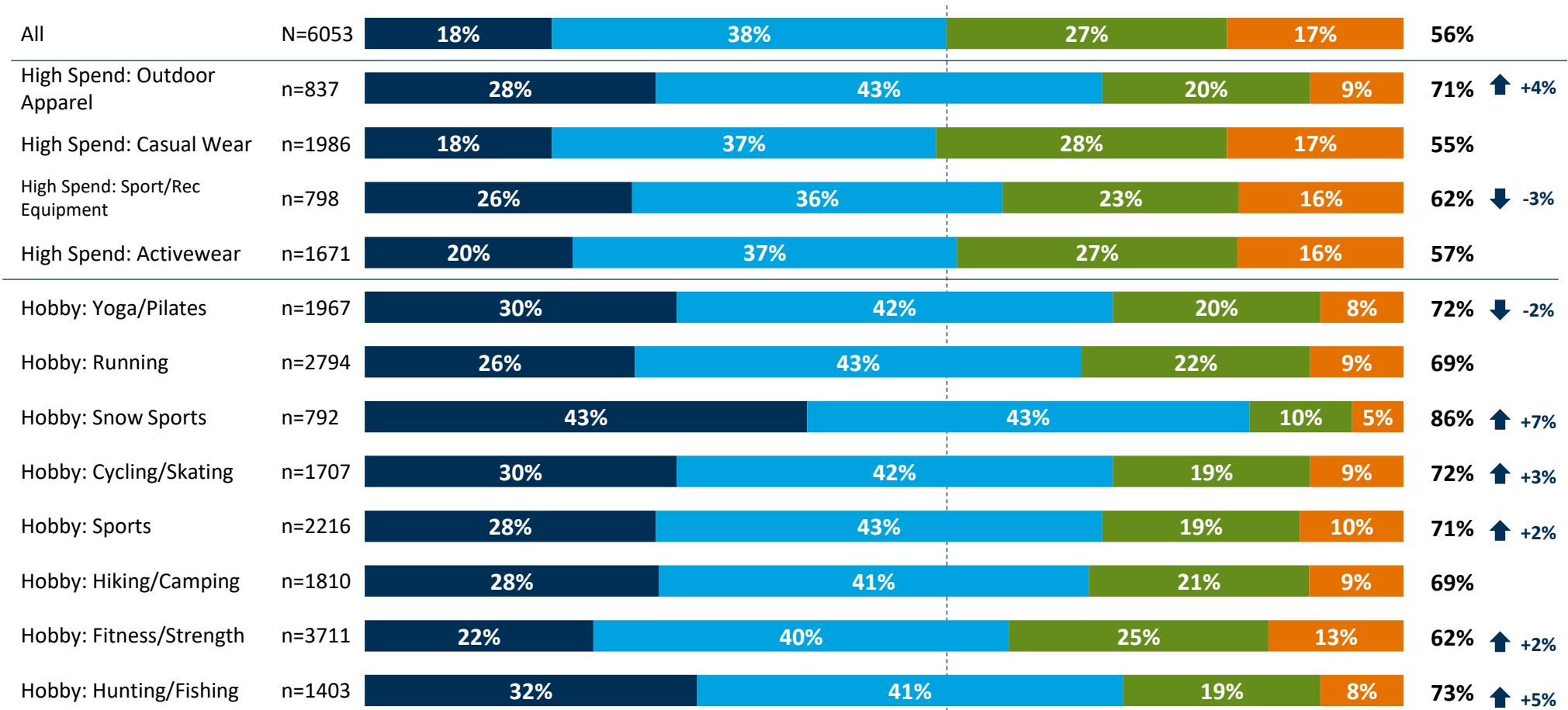
Higher spenders on outdoor apparel and active hobbyists, led by snow sports, continue to be more likely to look for information on a brand's sustainability, with increased rates compared to 2022

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

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

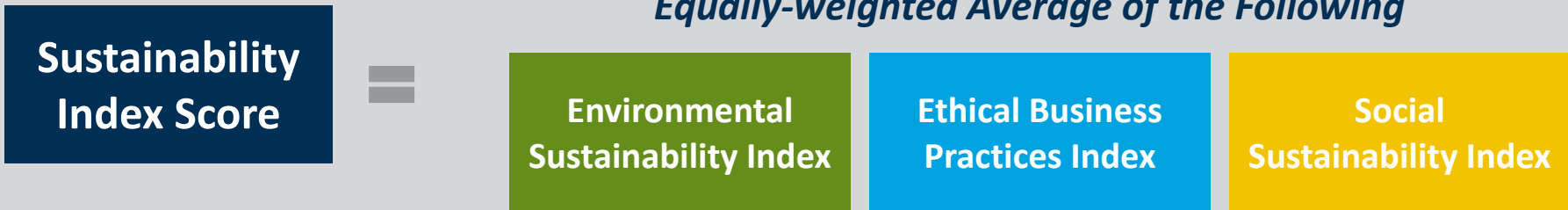
Sustainability Index Score Methodology (Continued)

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"> 1) Excellent 2) Good 3) Just fair 4) Poor 5) Don’t know / no opinion 	<ul style="list-style-type: none"> + 2x % Excellent + 1x % Good - 1x % Just fair - 2x % Poor 	$\frac{\text{Brand A Raw Score}}{\text{Avg. Metric Raw Score}} = \text{Brand A Index Score}$

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

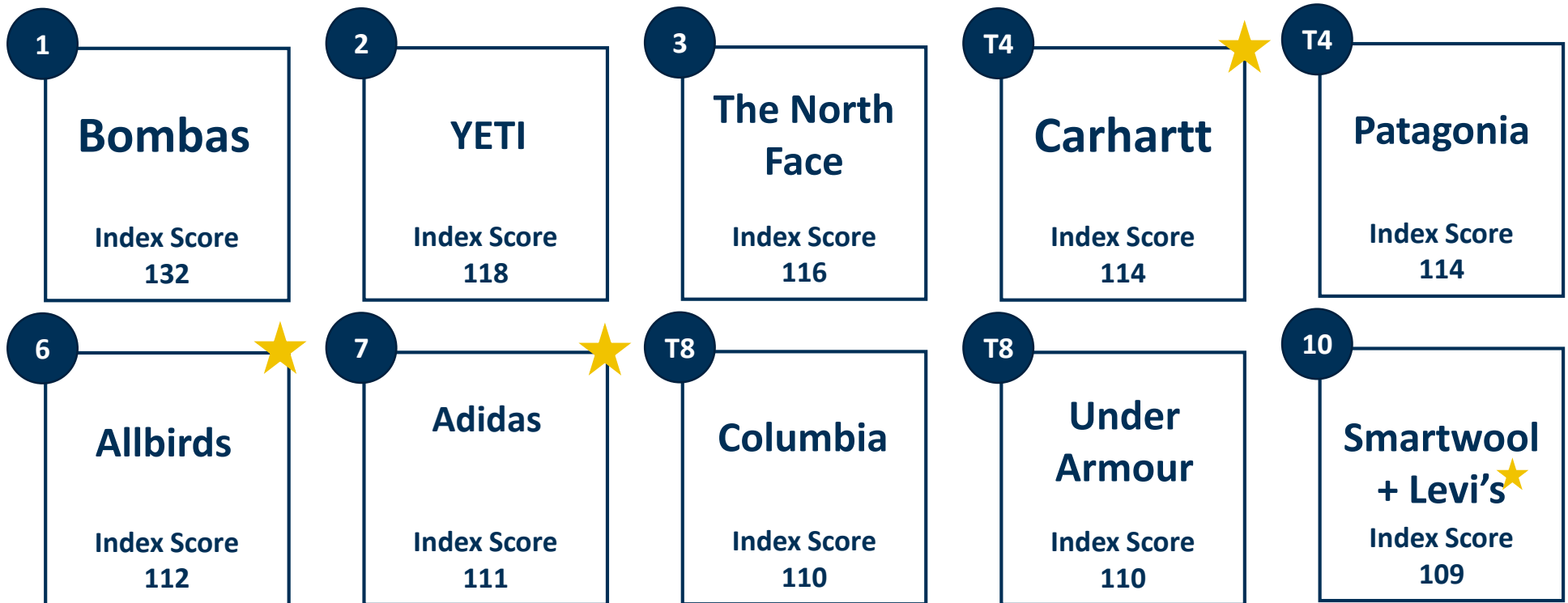
Equally-weighted Average of the Following



Bombas is the top ranked sustainable brand for the third consecutive year, while YETI climbs to the number two ranking behind concentrated focus on sustainability initiatives and messaging.

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. Nike, Carhartt and Birkenstock enter the top 10 this year

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.

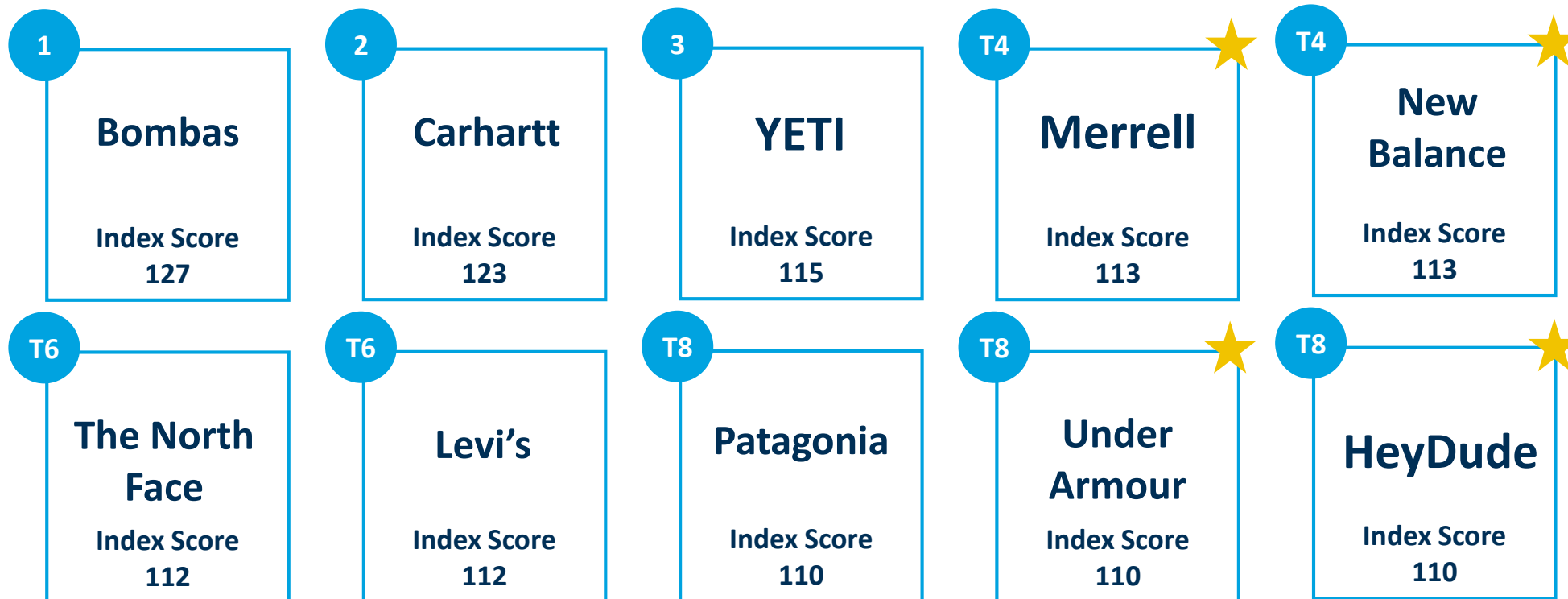


Bombas is seen as the brand with the most ethical business practices. Outdoor apparel brands (Patagonia, The North Face, Columbia) and sportswear brands (Merrell, New Balance, Under Armour) among those scoring very highly on business ethics

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.

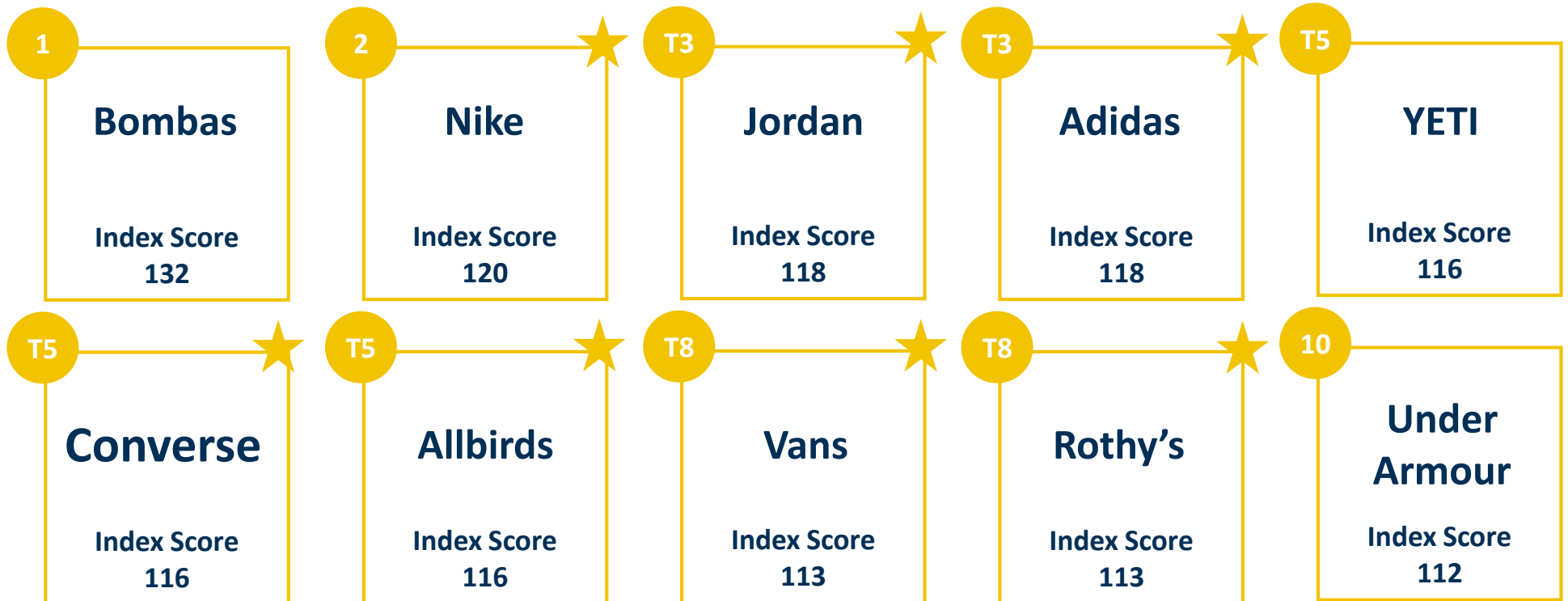


Bombas leads on social sustainability; Nike, Jordan, and Adidas moved into the top five on social sustainability this year, and Converse, Allbirds, Vans, and Rothy's also moved into the top 10

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.

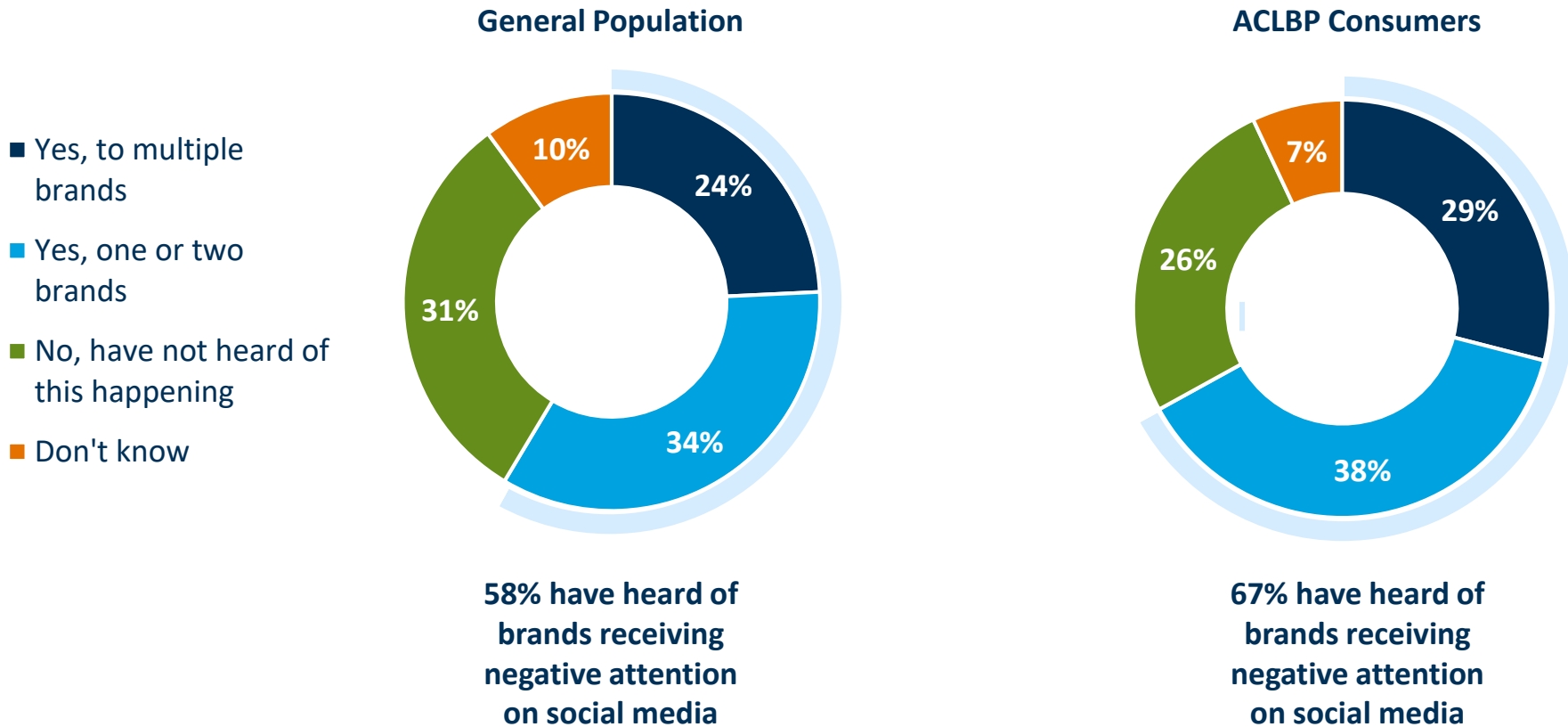


S Social Issues Findings

Two-thirds of US ACLBP consumers have heard of brands receiving negative attention on social media within the past year compared to approximately three in five general population

Sometimes, brands might receive negative attention on social media due to a statement they make or an action they take on social issues. Have you heard of this happening to a brand this year?

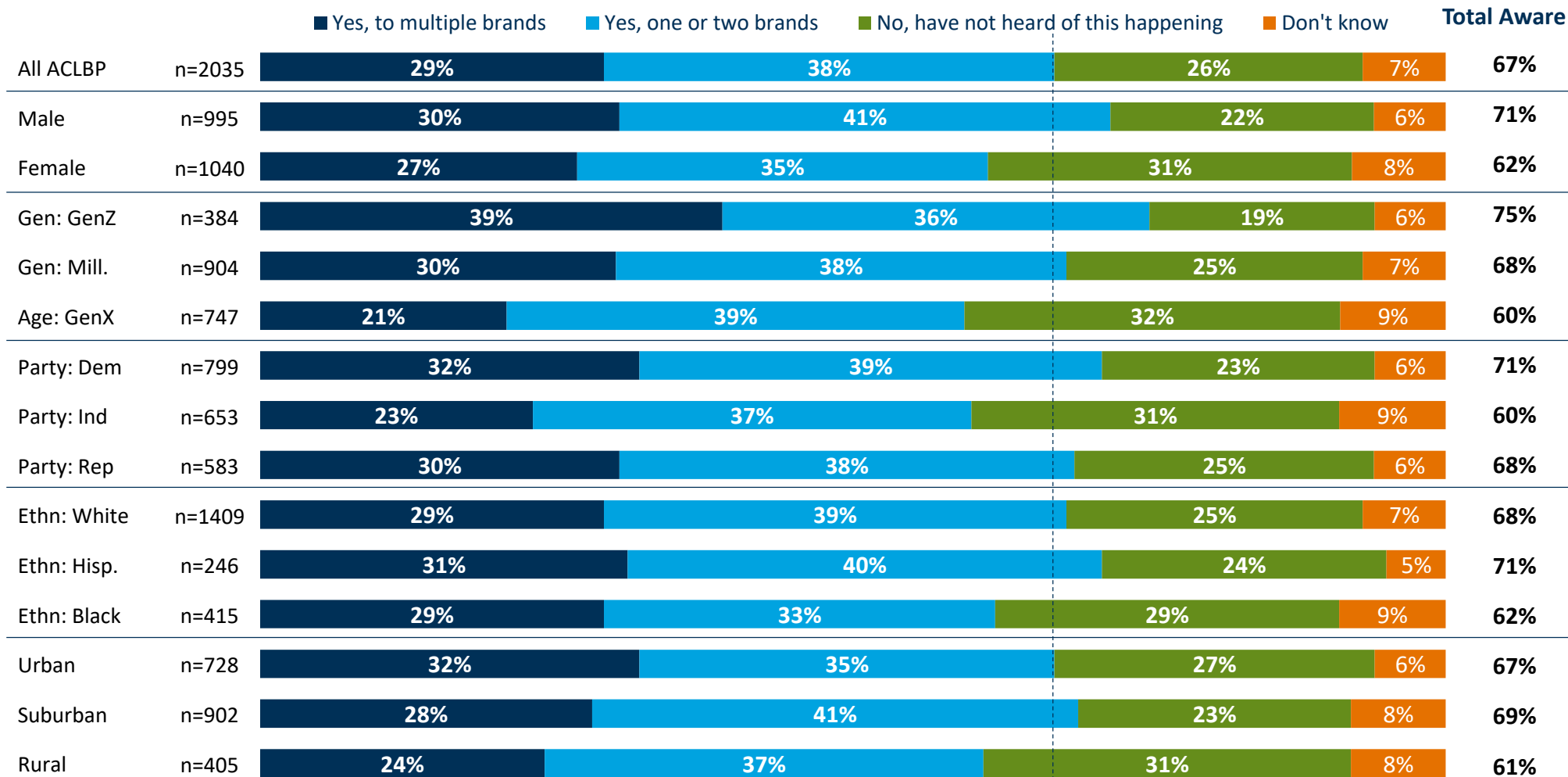
Negative Brand Attention on Social Media



Men and GenZers are more likely than their counterparts to have heard of brands which received negative attention on social media due to a statement or action made on social issues

Sometimes, brands might receive negative attention on social media due to a statement they make or an action they take on social issues. Have you heard of this happening to a brand this year? **Among Active/Casual Lifestyle Brand Purchasers.**

BRANDS & NEGATIVE SOCIAL MEDIA ATTENTION – AMONG ACLBP AUDIENCE



Across both audiences, around three in five say that it is important for brands to weigh in on current social issues. The same proportion also say it is important for a brand to weigh in on the side *which they agree with*

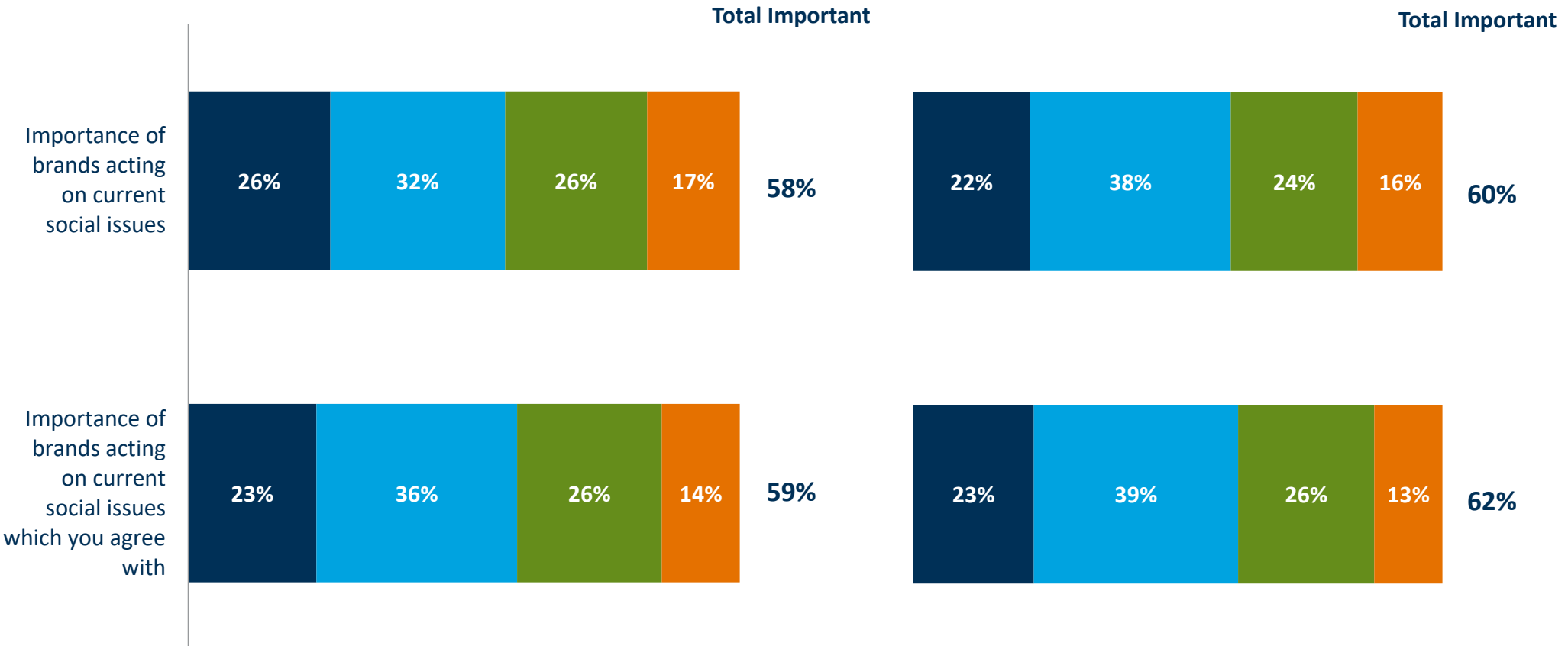
How important is it to you that brands make a statement or take an action on current social issues? / And, how important is it to you that brands hold opinions on current social issues that you agree with?

Importance of Brands Acting on Current Social Issues

GENERAL POPULATION

ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

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



Just under two in five respondents from either audience believe that it is better for a brand to make some sort of statement compared to none at all. Yet risks are high, as only one in three say a brand making a statement which they disagree with would not impact whether or not they trust the brand

When it comes to brands making statements or taking actions on current social issues, which of the following would you prefer? / Consider the following scenario: A brand has made a statement on a social issue that you disagree with. What is the best way for this brand to win back your trust?

Preference for Brand Statements on Social Issues / Actions to Remedy

GENERAL POPULATION

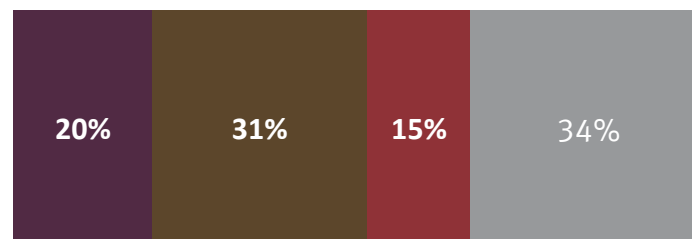
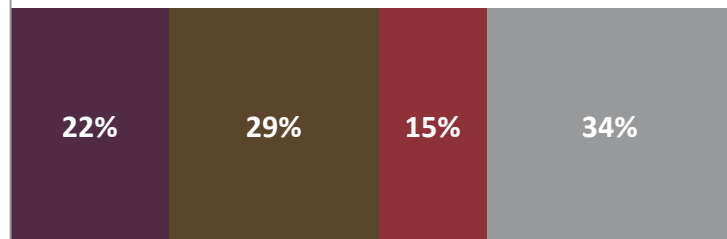
ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

- The brand weighs in on the issue, but on the opposite side of how I feel about the issue
- The brand does not weigh in on the issue at all despite me supporting one side of the issue

Which of the following would you prefer



How can a brand win back your trust after making a statement/action on a social issue you disagree with

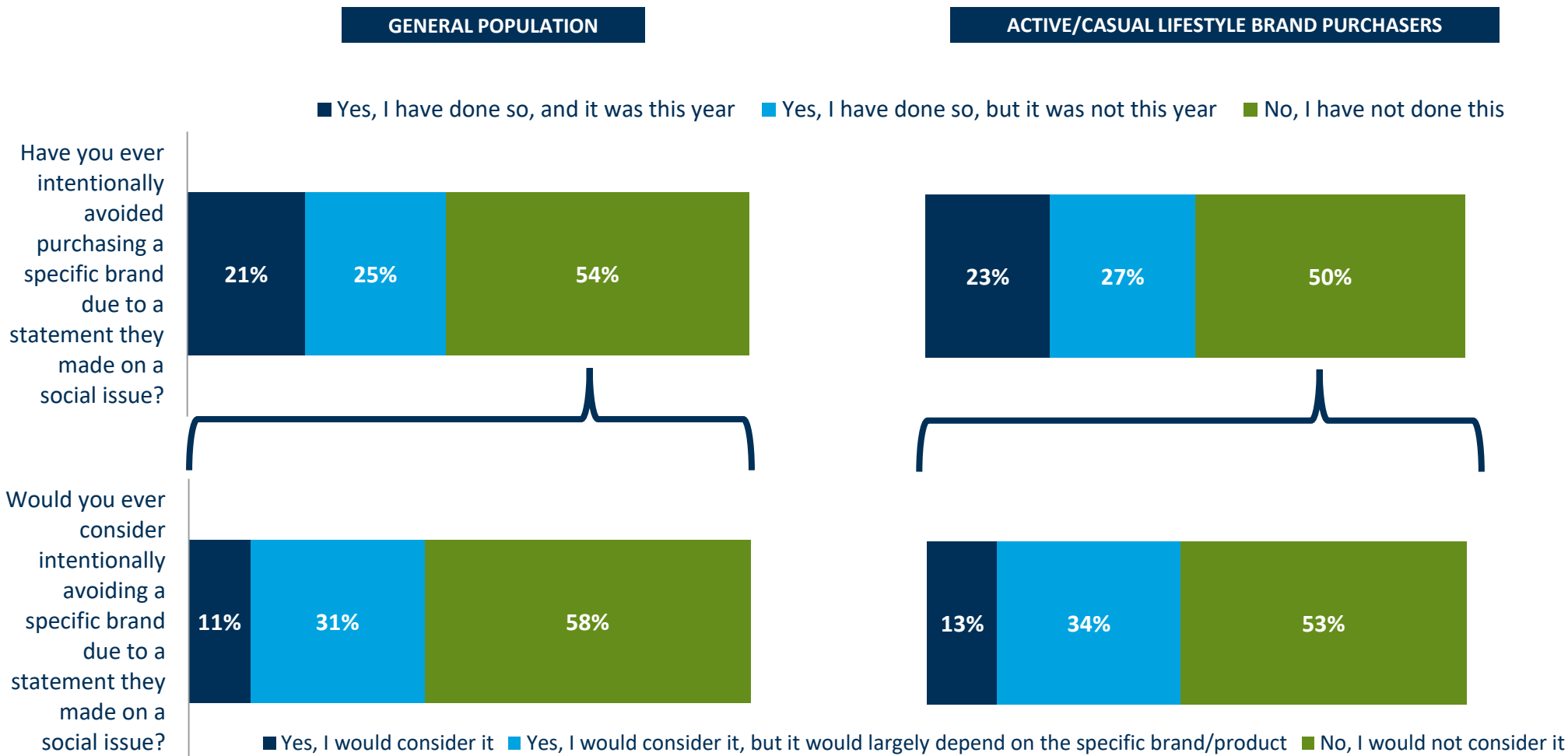


- The brand withdraws their statement entirely and issues an apology
- The brand issues another statement to acknowledge the side of the social issue which I agree with
- Nothing, because they cannot win back my trust
- Nothing, because this does not impact whether or not I trust this brand

Half of ACLBP respondents have boycotted a brand either this year (23%) or in prior years (27%). Only a quarter (53% of the half of category purchasers that have never boycotted in the past) would not consider potentially boycotting a brand in the future.

Have you ever intentionally avoided purchasing a specific brand due to a statement they made on a social issue? / Would you ever consider intentionally avoiding a specific brand due to a statement they made on a social issue?

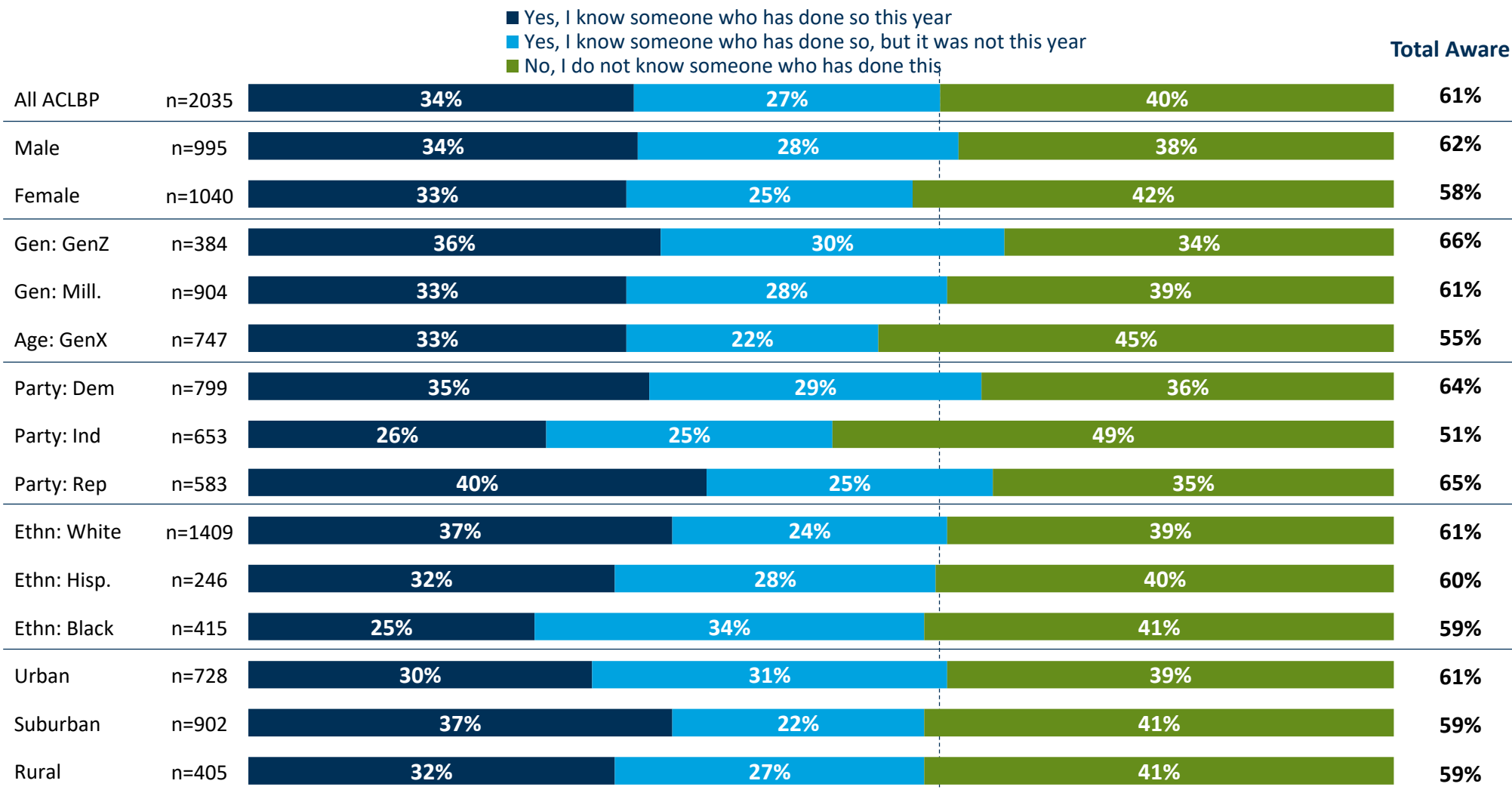
Personal Aptitude to Boycott a Brand



While three in five ACLBP consumers are aware of someone who has boycotted a brand in the past year, political partisans, GenZers, and men are all more likely to know of someone than their counterparts

Do you personally know someone, not including yourself, who has intentionally avoided purchasing a specific brand due to a statement the brand made on a social issue? **Among Active/Casual Lifestyle Brand Purchasers.**

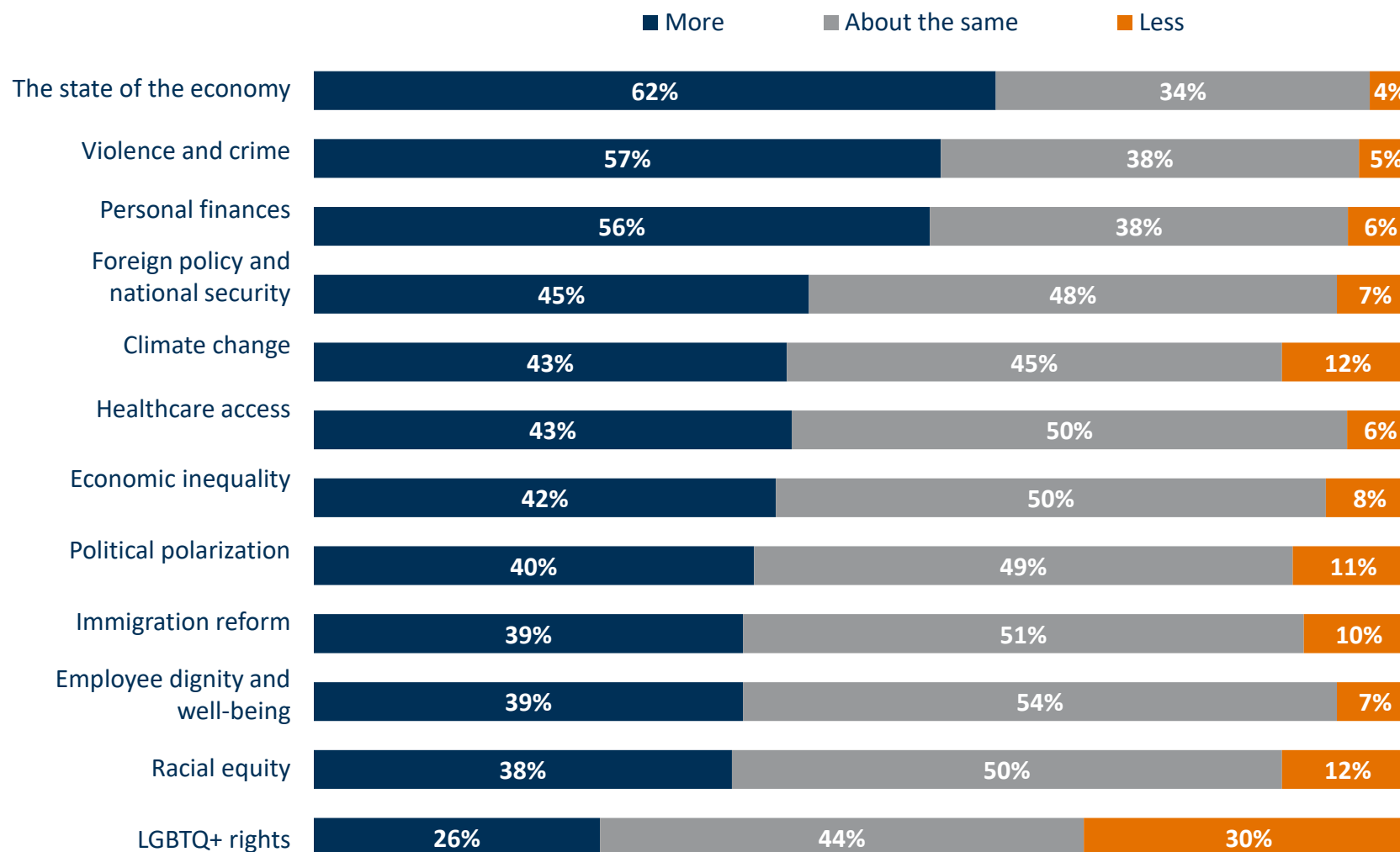
Personally Know Someone Who Has Boycotted a Brand—Among ACLBP Audience



A hierarchy of needs has prioritized economic and safety concerns. The state of the economy is the top concern amongst ACLBP (62% becoming more concerned than last year), followed by violence & crime (57%), and personal finances (56%).

Over the past year, have you become more or less concerned about

Personal Feelings Towards Issues – ACLBP Audience

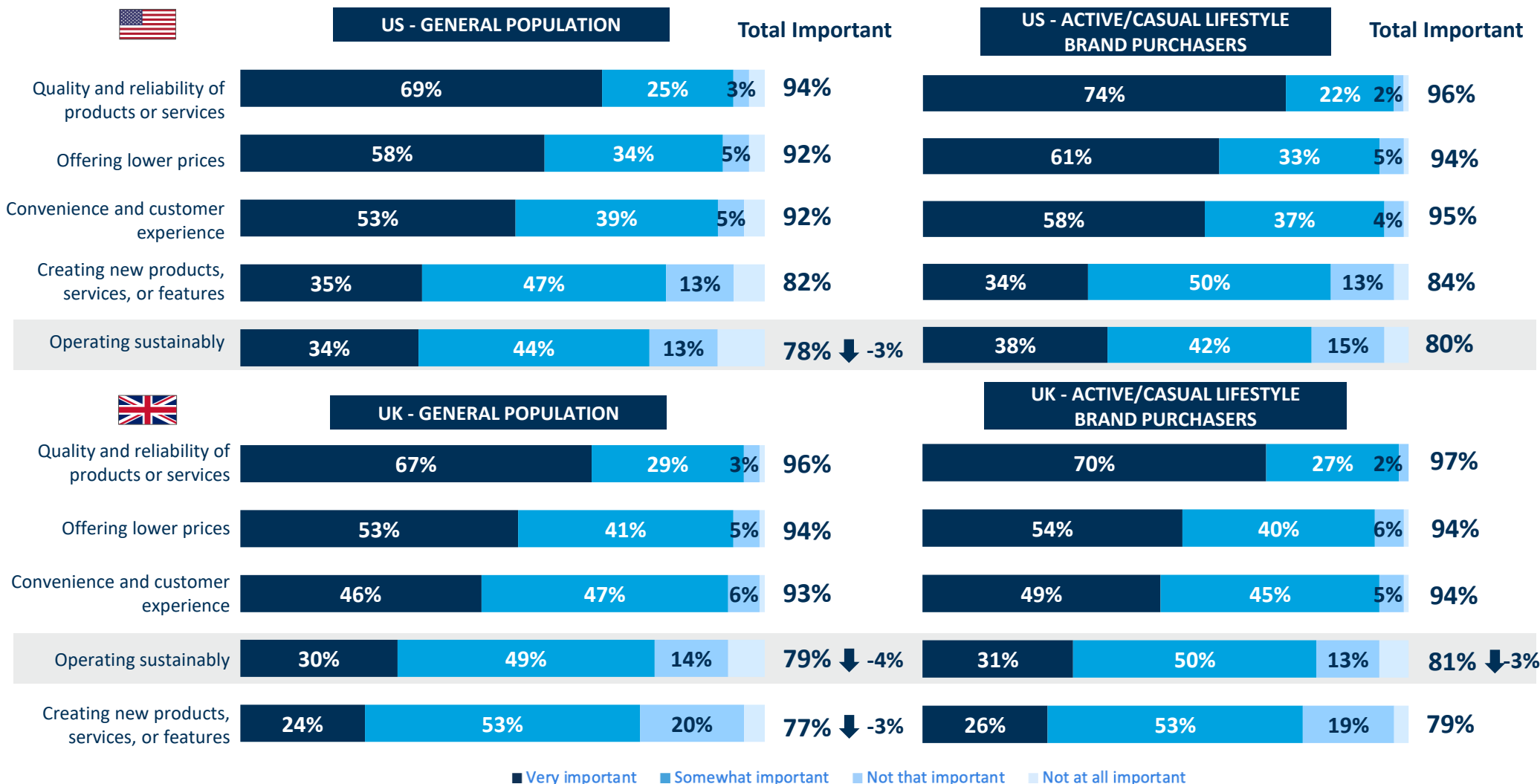


S International Findings

In the U.S. and UK, general population and ACLBP consumers agree that “quality and reliability of products or services” is the most important brand priority, with 90%+ reporting it at least somewhat important

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)”

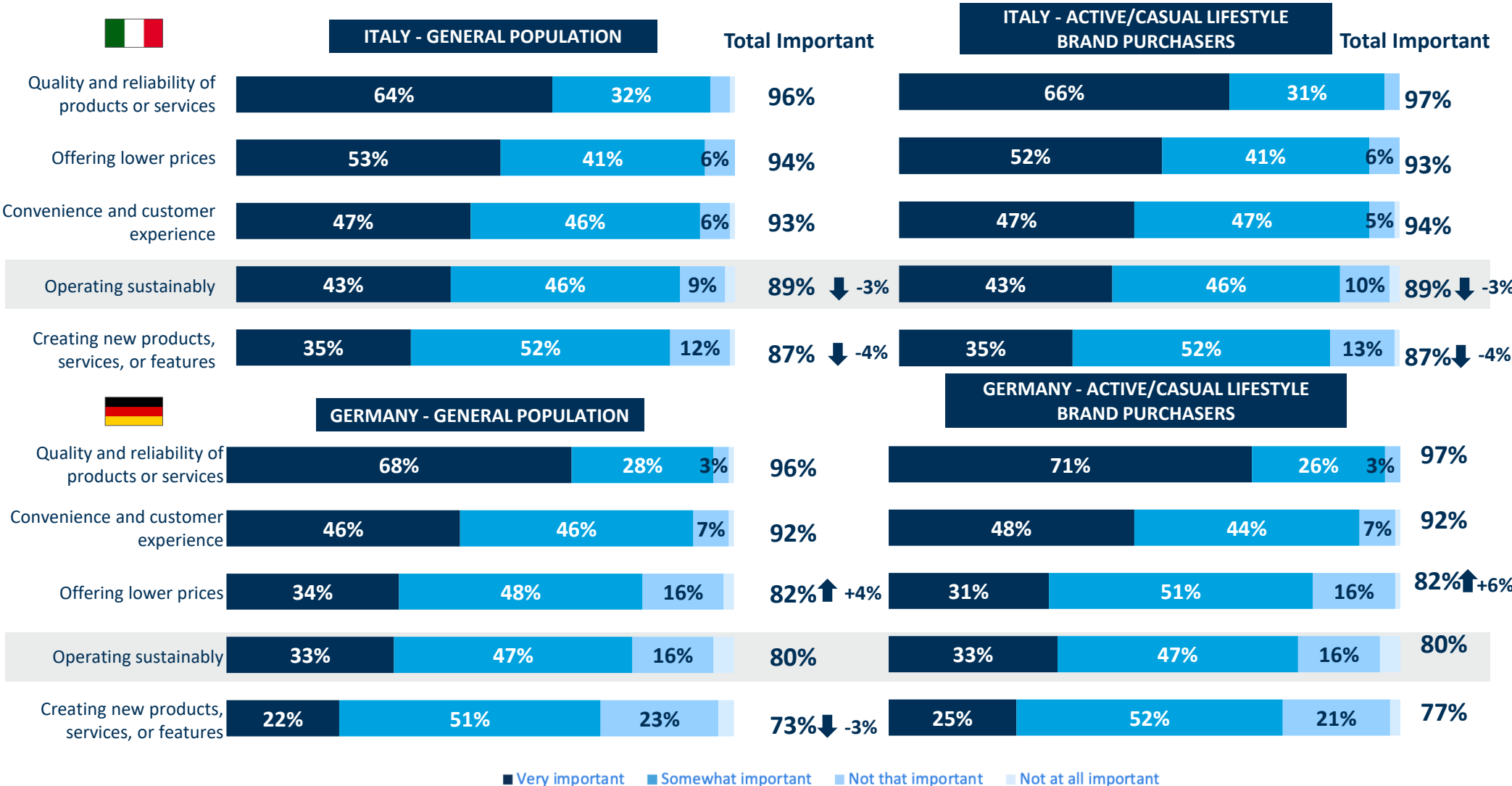
BRAND PRIORITIES



In Italy 89%, and in Germany 80%, of respondents claim brands operating sustainably is at least somewhat important, with consistent responses across Gen Pop and ACLBPs

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)"

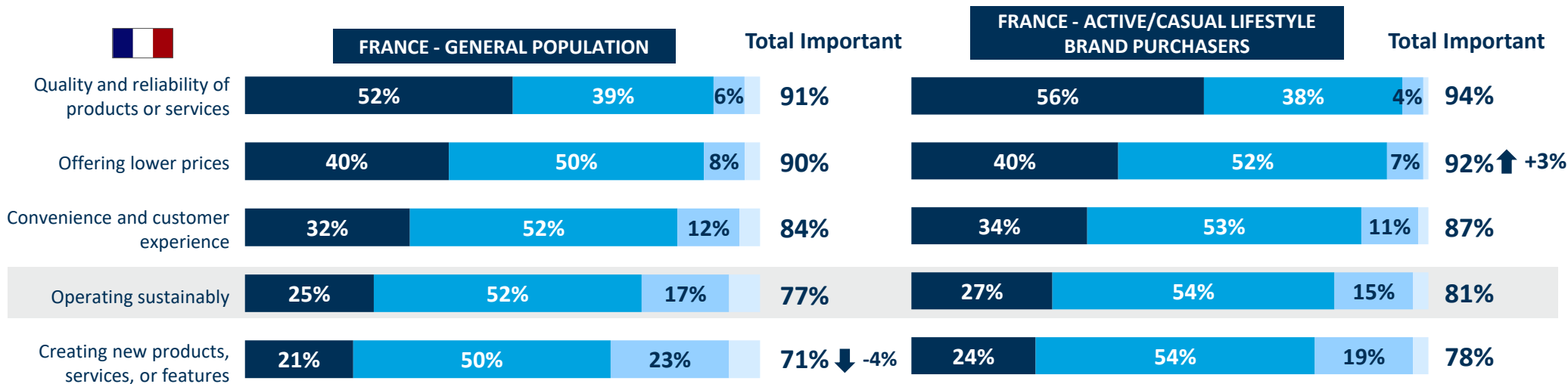
BRAND PRIORITIES



Most French ACLBPs (81%) believe brands operating sustainably is at least somewhat important, though decreasing -4ppts y/y, and above Gen Pop (77% at least somewhat important)

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

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Overall, Gen Pop and ACLBPs are largely aligned on the importance of environmental sustainability; Italians are most likely to place high importance on environmental sustainability and French consumers are the least likely

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

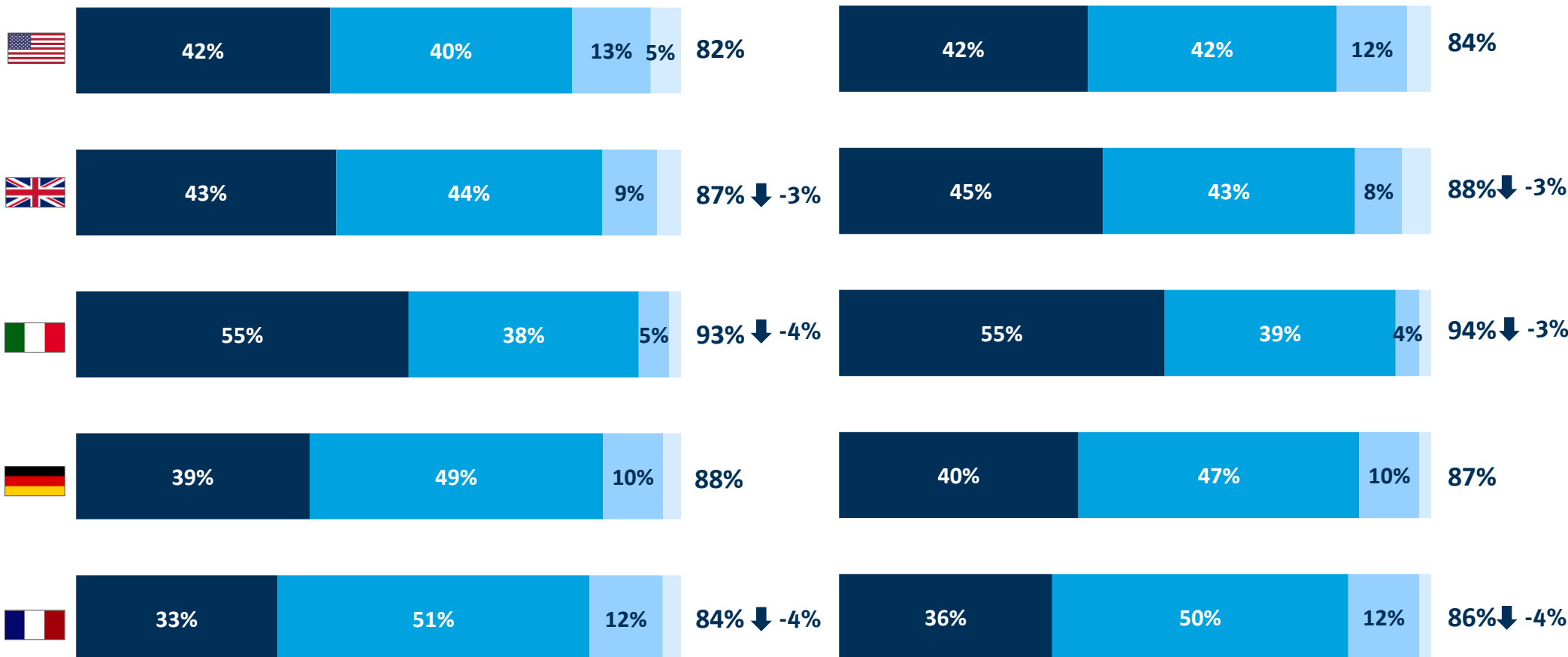
■ Very important
 ■ Somewhat important
 ■ Not that important
 ■ Not at all important

GENERAL POPULATION

Total Important

ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



Less than half of all ACLBPS in Germany or France find it “very” important that brands operate with ethical business practices, compared to 50%+ for other markets

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

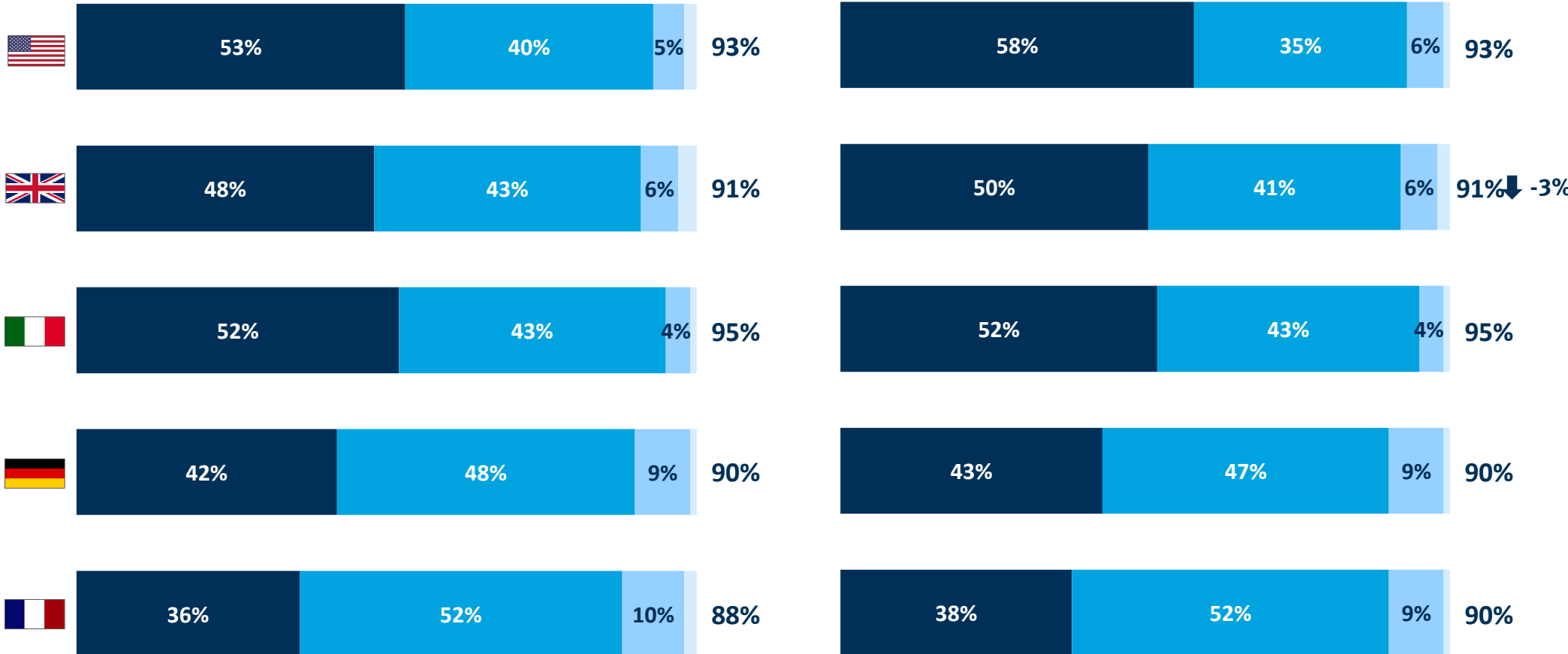
■ Very important
 ■ Somewhat important
 ■ Not that important
 ■ Not at all important

GENERAL POPULATION

Total Important

ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



Slightly up from last wave, approximately two in five general American consumers and ACLBPs believe it is important that brands operate in a socially sustainable way- a similar proportion to the UK

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

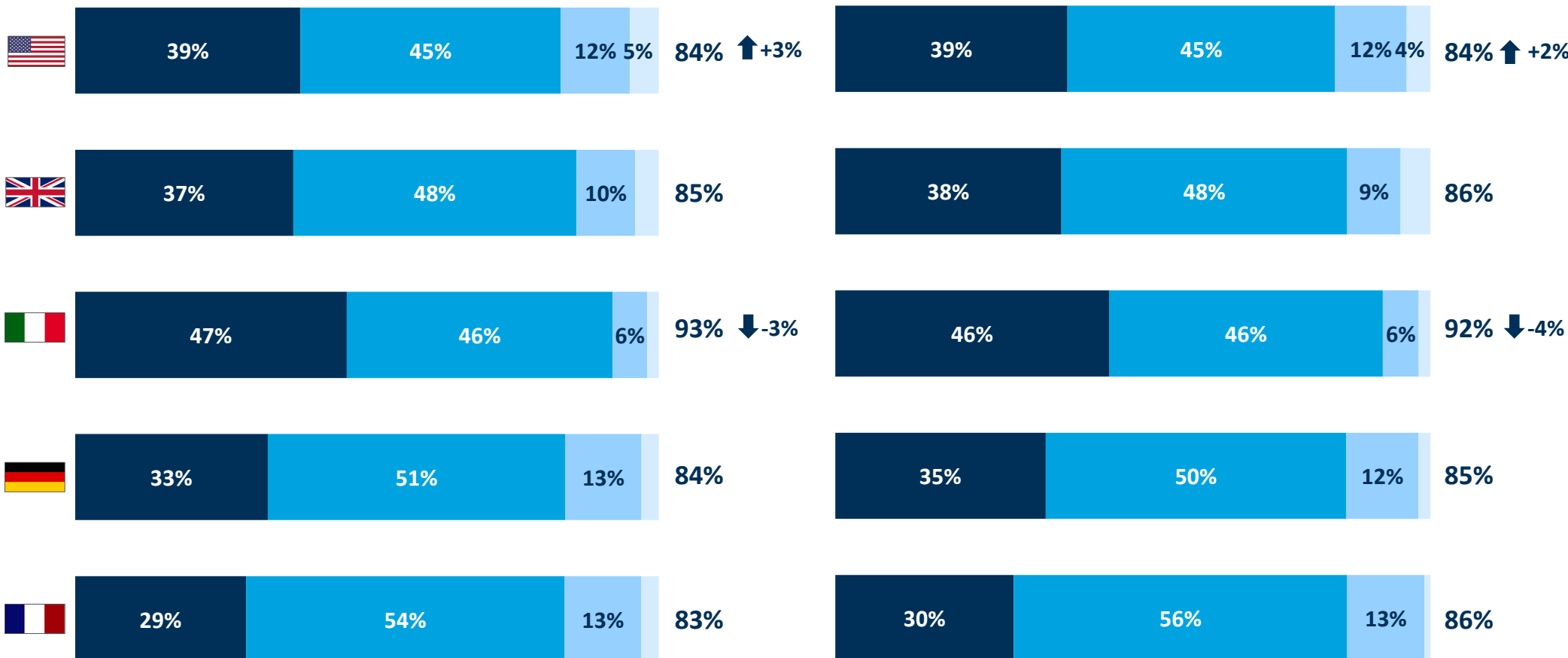
■ Very important ■ Somewhat important ■ Not that important ■ Not at all important

GENERAL POPULATION

Total Important

ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS

Total Important



ACLBP within the US focus more on employee satisfaction, fairness, and creating domestic jobs; European ACLBPs generally show lower emphasis on specific sustainability items compared to last year

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
Giving workers fair pay and benefits	58%	56%	57%	51%	38% ↓-4%
Ensuring they pay their fair share in taxes	49%	54% ↓-4%	52%	41%	35%
Promoting work/life balance for employees	48% ↑+2%	42% ↓-3%	50%	35%	34% ↓-3%
Protecting international worker health, safety, and human rights	48% ↑+3%	47%	59% ↓-6%	42% ↓-5%	39% ↓-3%
Creating more domestic jobs	45%	35%	53% ↓-5%	38%	35%
Protects human rights in the global supply chain	45%	44% ↓-5%	51% ↓-6%	42%	37%
Supporting racial equality	44%	42% ↓-3%	47% ↓-5%	34% ↓-5%	32% ↓-7%
Protecting local environments/ecosystems	40%	42%	51% ↓-5%	40% ↓-4%	38% ↓-5%
Supporting gender equality	40%	36% ↓-4%	45% ↓-6%	31% ↓-3%	33% ↓-6%
Practicing diverse and equitable hiring	40% ↑+2%	34% ↓-3%	45% ↓-5%	27% ↓-4%	27% ↓-4%
Minimizing packaging/waste	39%	47%	52% ↓-7%	46%	38% ↓-6%
Investing in the communities they operate in	39% ↑+3%	30% ↓-3%	43%	24% ↓-3%	22% ↓-3%
Using less energy and water	35%	37% ↓-4%	49% ↓-5%	41% ↓-4%	37% ↓-3%
Reducing carbon emissions	34% ↓-2%	38% ↓-3%	53% ↓-4%	36% ↓-6%	35% ↓-5%
Using more renewable or recycled materials	34%	40%	47% ↓-7%	34% ↓-10%	33% ↓-5%
Philanthropy and giving back	32% ↑+2%	26%	22%	17% ↓-3%	15% ↓-3%
Creating products/services tailored to underserved populations	31% ↑+2%	25%	39%	26% ↓-3%	25% ↓-5%
Ensuring their products are recycled	29%	36%	46% ↓-7%	32%	35% ↓-4%
Achieving carbon neutrality	29%	33%	45% ↓-4%	33% ↓-4%	28% ↓-4%
Advocating for environmental causes publicly	29%	28% ↓-3%	37% ↓-7%	23% ↓-5%	27% ↓-8%
Supporting LGBTQ+ equality	28%	26% ↓-4%	30% ↓-7%	20%	20% ↓-4%
Advocating for political causes that align with my values	25% ↑+3%	17%	24%	16%	19%

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

Over the past year, the importance of low prices has increased in all 5 countries with +8ppts y/y increase in France, +5ppts y/y in the U.S. and Germany, and +3ppts y/y in the UK and Italy

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
Good value	68%	72% ↑+3%	74%	71%	72%
Low price	57% ↑+5%	53% ↑+3%	45% ↑+5%	40% ↑+5%	55% ↑+8%
Reputation for durability	48% ↓-3%	50%	45%	51%	31%
Style/design aesthetic	36% ↓-2%	38% ↓-5%	34%	38%	33%
Sustainability	32%	35%	40%	36% ↓-3%	52% ↓-7%
Brand is unique/different	20%	16% ↓-3%	17%	16% ↓-3%	19%
Brand is trendy/in-style	20% ↑+2%	20%	16%	21%	21% ↓-5%
Innovation/new technology	18% ↓-2%	16%	28%	25%	18%

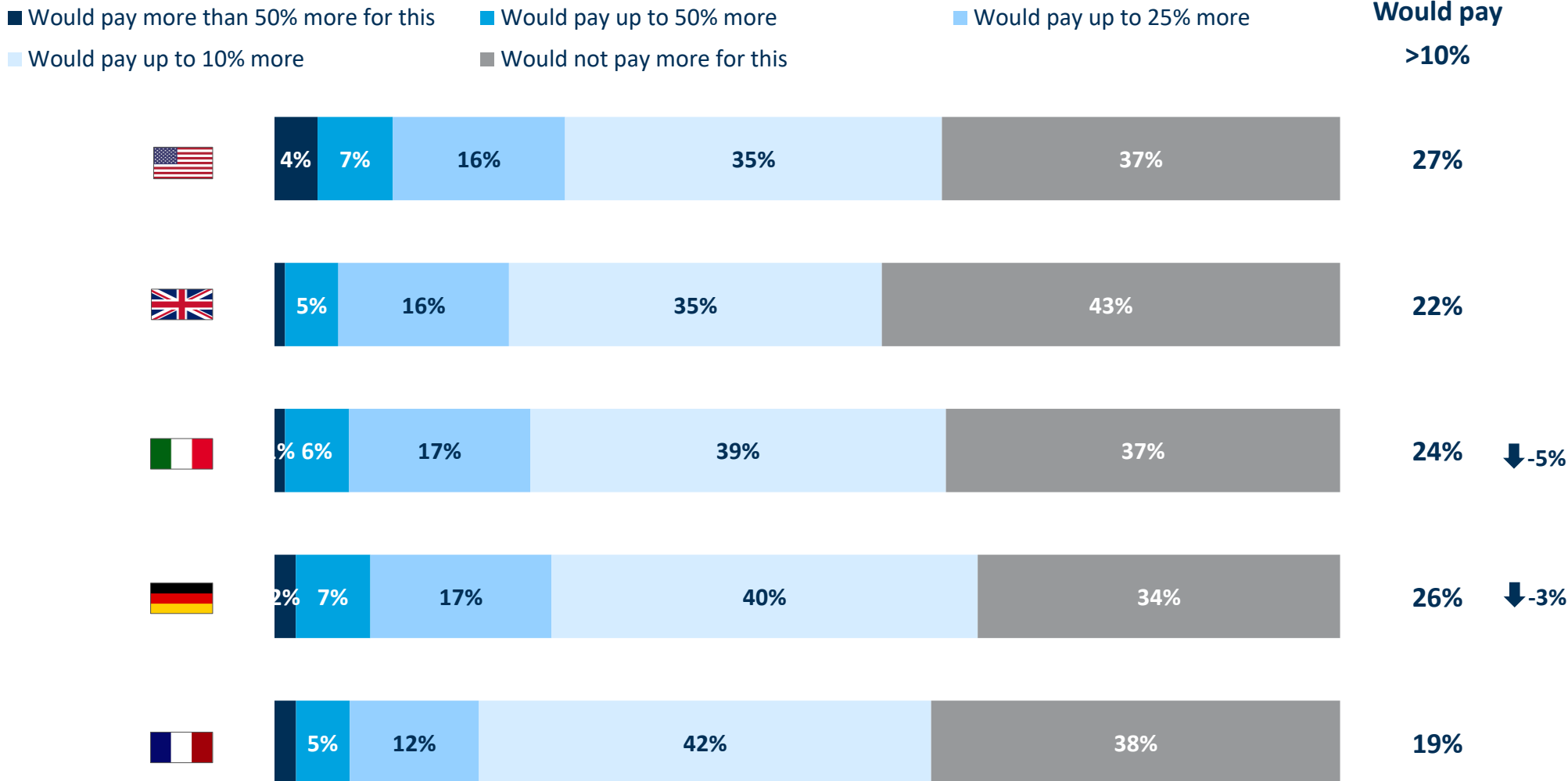
Blue shading indicates top 3 priorities in each market.

Approximately one-quarter of American, Italian, and German consumers would pay at least 10% more for sustainable practices; however, at least one-third from all five countries would not pay anything 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 “LEADING SUSTAINABILITY PRACTICES”

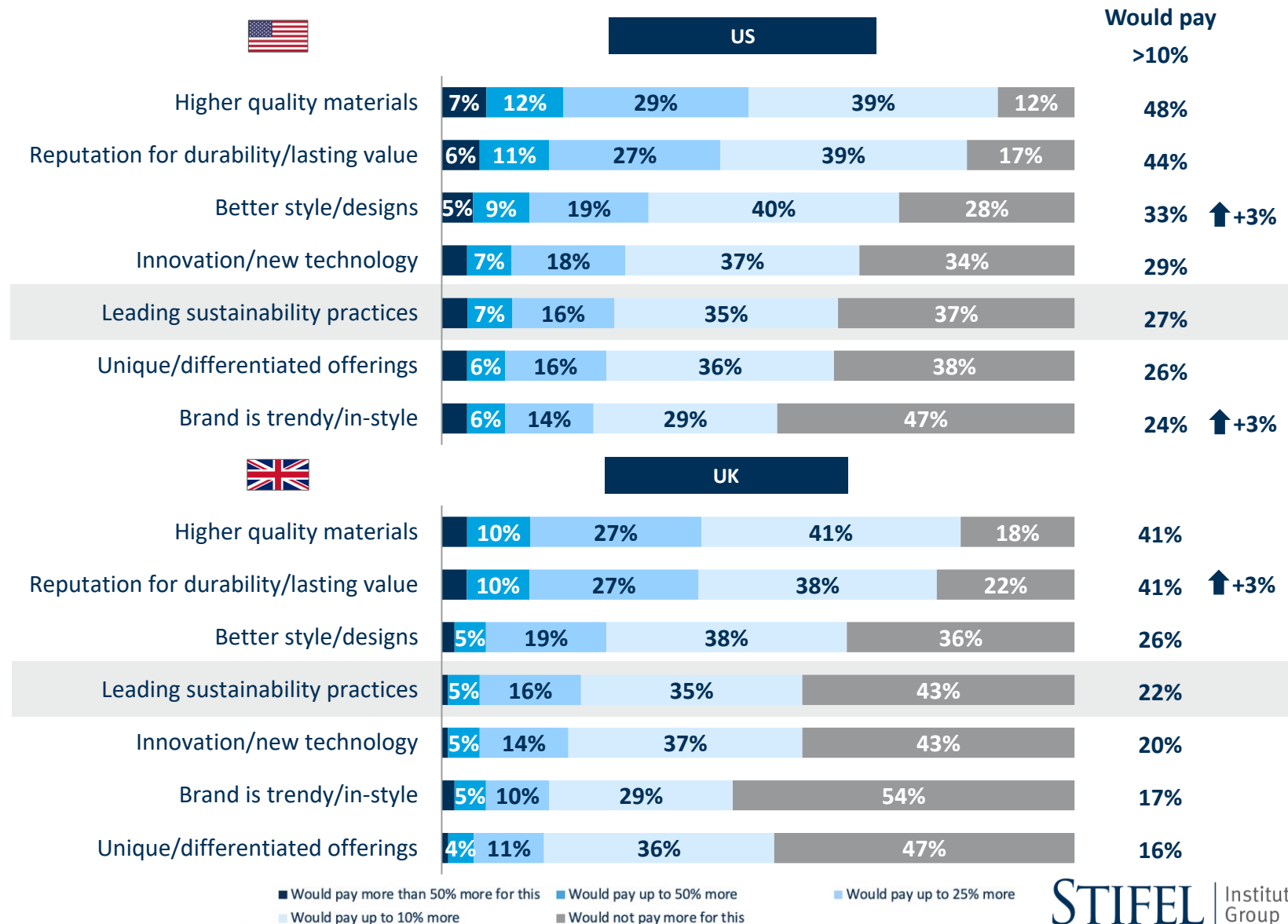
ACTIVE/CASUAL LIFESTYLE BRAND PURCHASERS



While there is not as much interest in paying more for unique and trendy items, consumers from the US and UK would pay more for quality and durability

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**

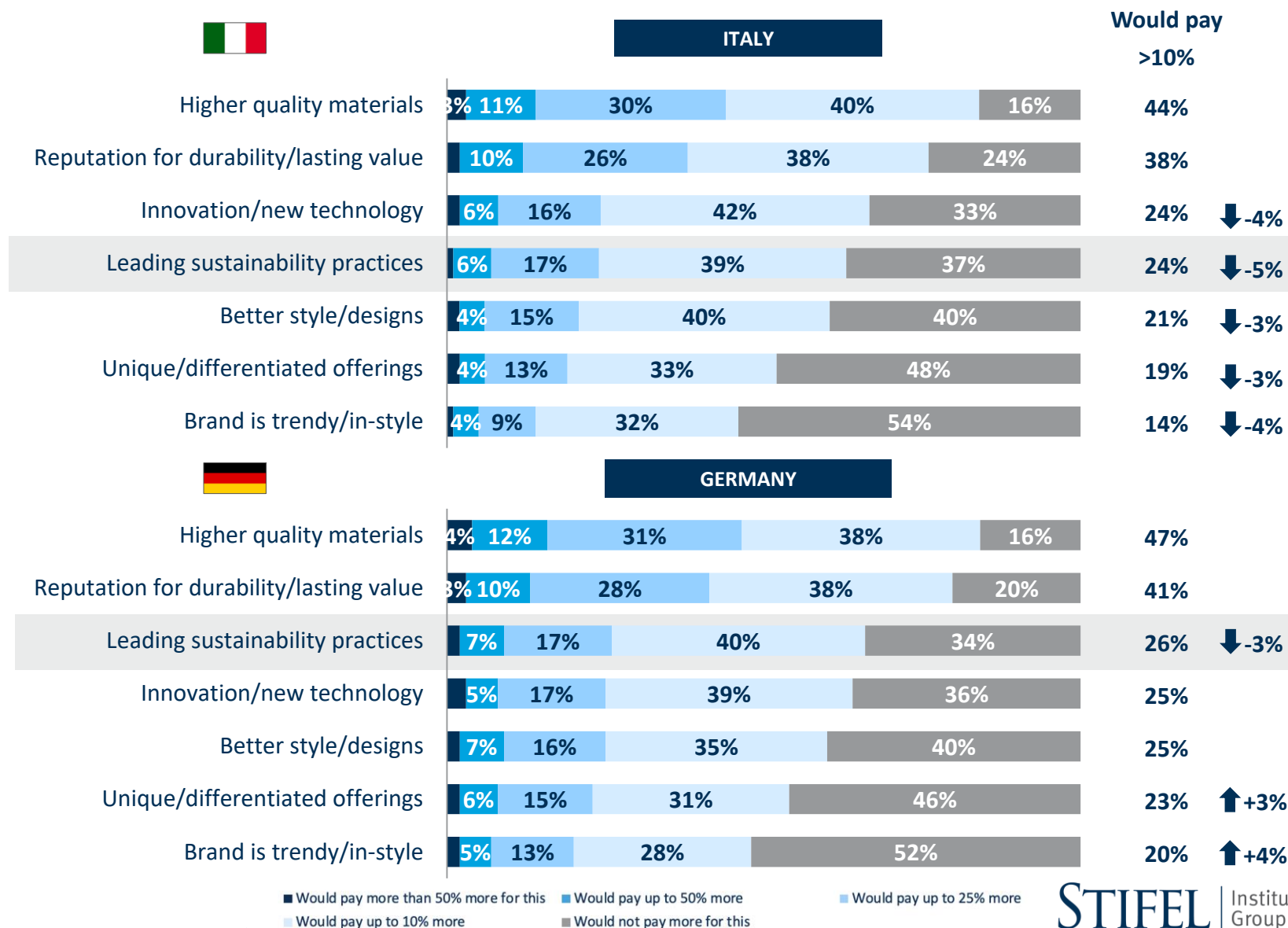
WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



Italian consumers show generally lower appetite y/y for spending a premium brand attributes; German consumers show a y/y increase in willingness to spend for differentiated offering and trendy/ in-style brands

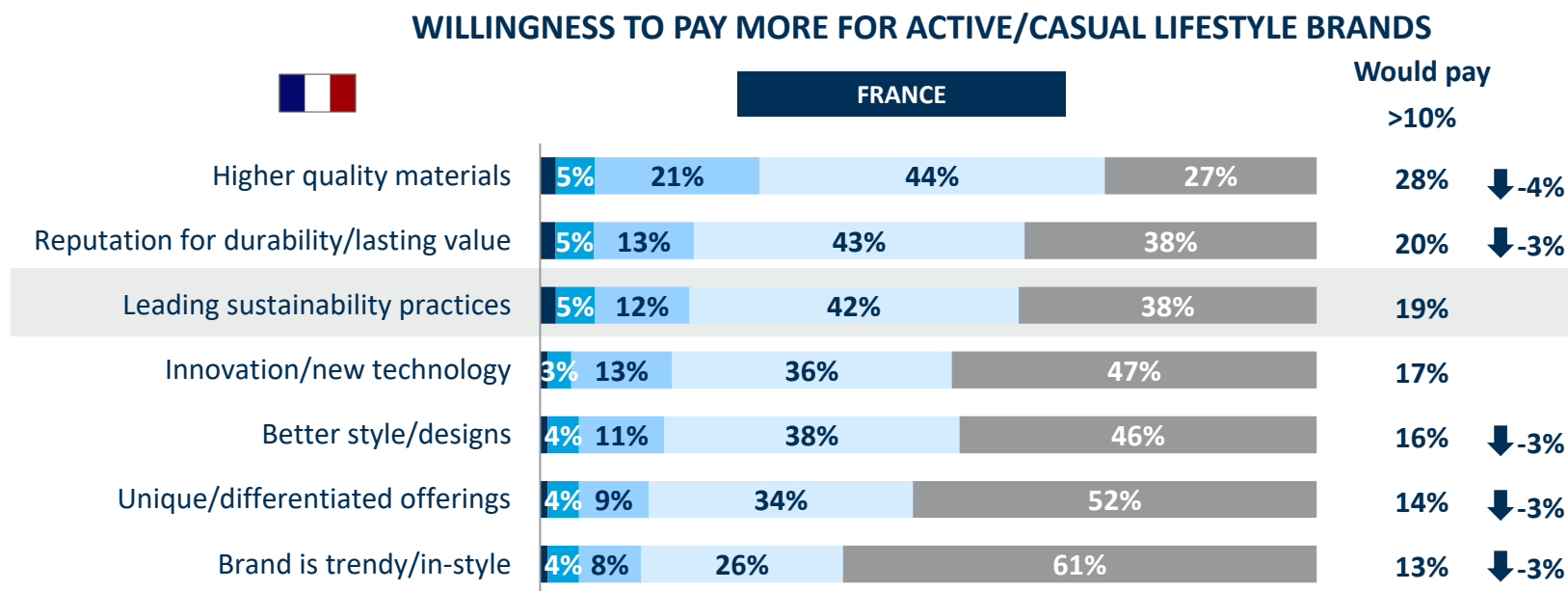
Thinking specifically about shopping with active/casual lifestyle apparel brands, how much more (if at all) would you pay for brands that offer the following? **Shown among Active/Casual Lifestyle Brand Purchasers**

WILLINGNESS TO PAY MORE FOR ACTIVE/CASUAL LIFESTYLE BRANDS



French consumers are less likely than the others to say they'd pay more for anything; Appetite for spending on leading sustainability practices held steady y/y, while willingness to pay for five out of the other seven attributes declined y/y

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**



Would pay more than 50% more for this
 Would pay up to 50% more
 Would pay up to 25% more
 Would not pay more for this
 Would pay up to 10% more

While the other markets saw mostly slight decreases across the statements, the US saw the most consistent increases, especially with now nearly four in five Americans saying that they are “trying to be more sustainable”

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
I am trying to be more sustainable in my day-to-day life	78% ↑+3%	77% ↓-5%	85% ↓-3%	81%	82%
I care more now about the sustainability of products I buy than I did a year ago	70% ↑+3%	70% ↓-6%	74% ↓-3%	64% ↓-6%	76%
I regularly consider pre-owned, second-hand, or refurbished goods when shopping (i.e., consignment, thrift shopping etc.)	64%	67%	56%	54%	68% ↓-3%
I intend to purchase fewer products for the sake of sustainability	60% ↑+2%	65% ↓-4%	63% ↓-5%	66%	71%
I have purchased a new brand/product specifically because of their sustainability practices	59%	51% ↓-5%	57% ↓-5%	51% ↓-4%	63%
I try to learn about a brand's sustainability practices before I buy it for the first time	56% ↑+2%	54%	63% ↓-5%	54% ↓-7%	66%
I regularly opt for more expensive brands or products because they are more sustainable	49% ↑+2%	44% ↓-6%	45%	46% ↓-5%	55% ↓-3%
I have boycotted or stopped buying a brand/product specifically because of its sustainability (or lack thereof)	41%	40% ↓-5%	51%	48% ↓-5%	55%
I regularly consider renting goods or clothing instead of buying	33%	30% ↓-3%	36% ↑+3%	31%	35%

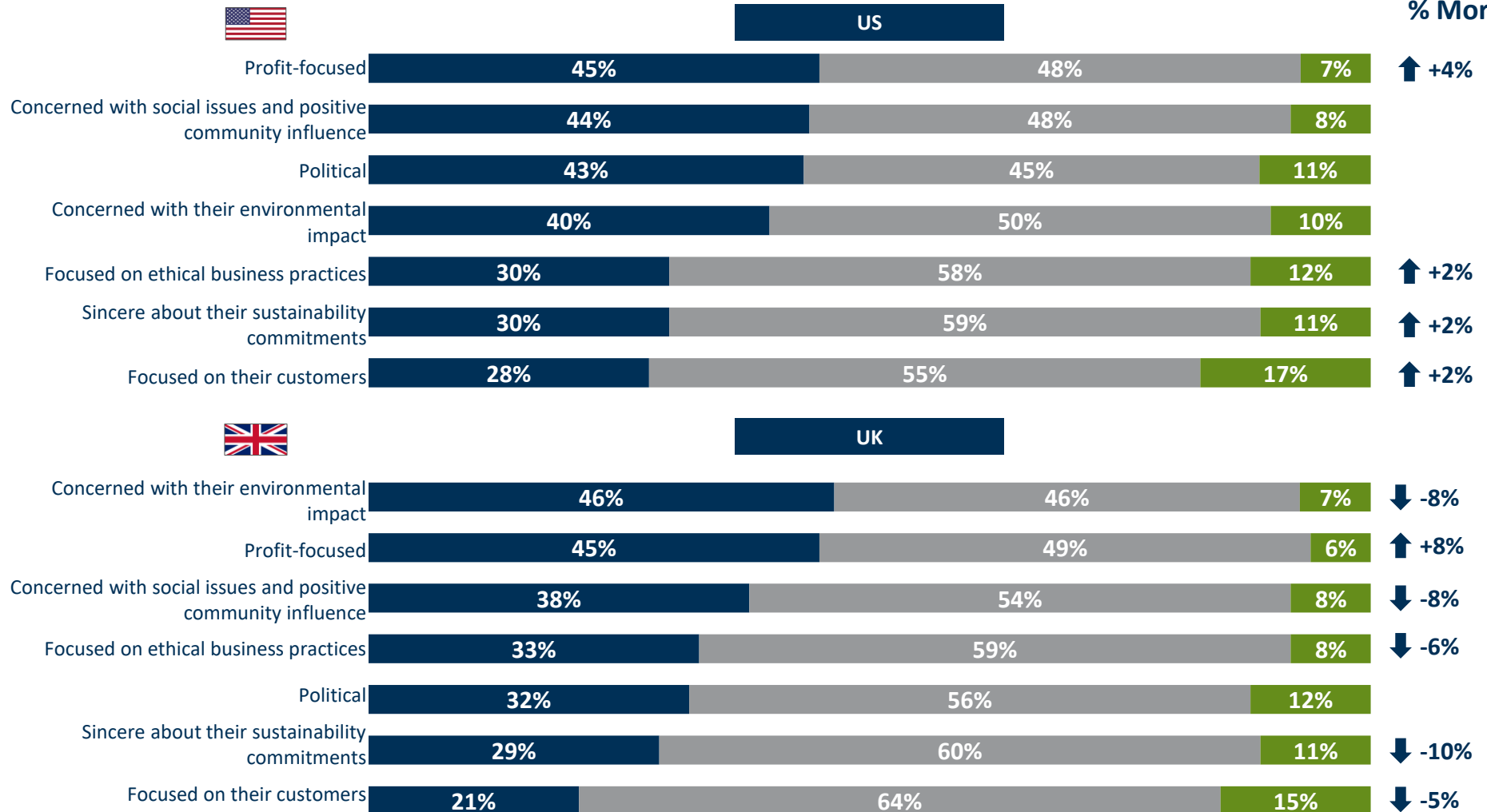
3 in 10 US consumers feel similarly that brands have become more sincere in their sustainability commitments and focus on ethical business practices

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

BRAND TRENDS OVER PAST YEAR

■ More ■ About the same ■ Less

Significant Changes in % More



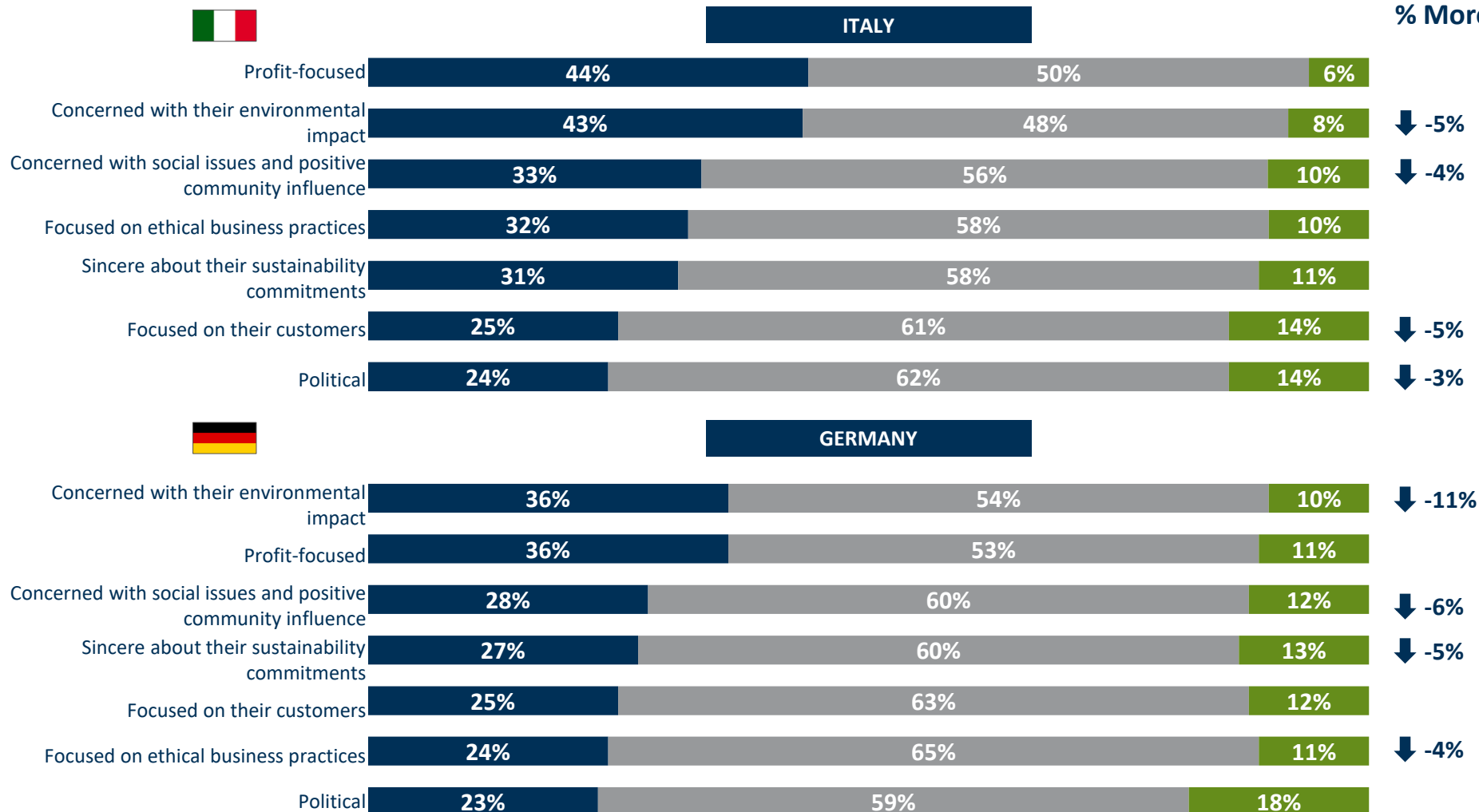
This wave there was an -11ppt y/y decrease among Germans who feel brands have become more concerned with their environmental impact (currently 36%), now tied with those Germans who feel brands have become more profit-focused

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

BRAND TRENDS OVER PAST YEAR

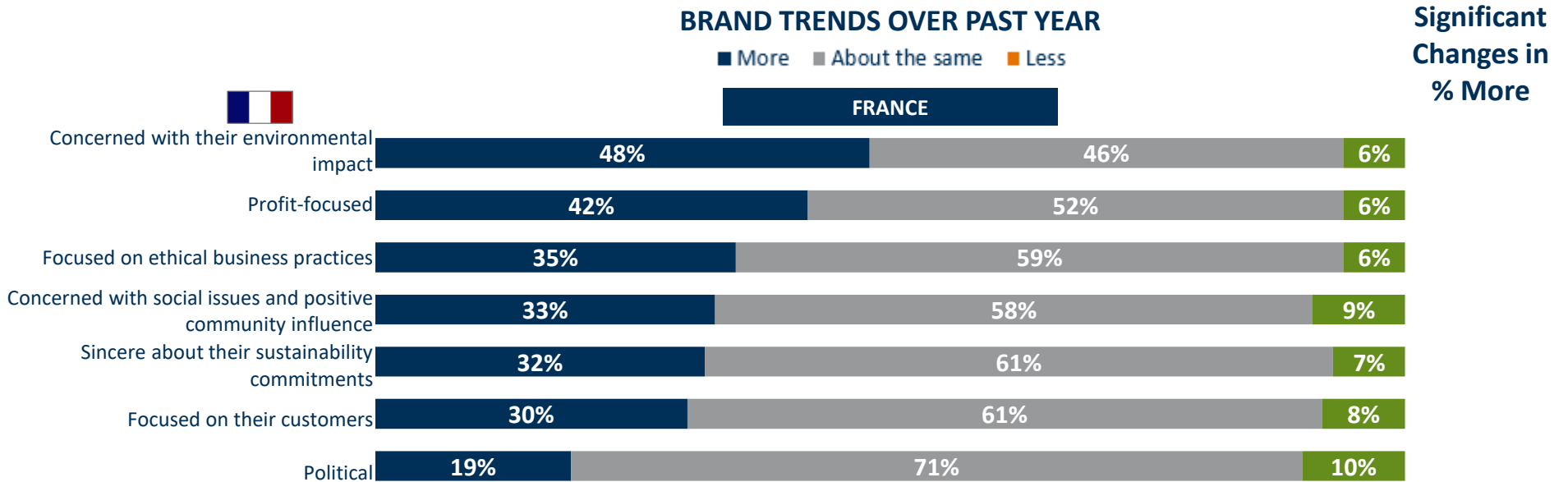
■ More ■ About the same ■ Less

Significant Changes in % More



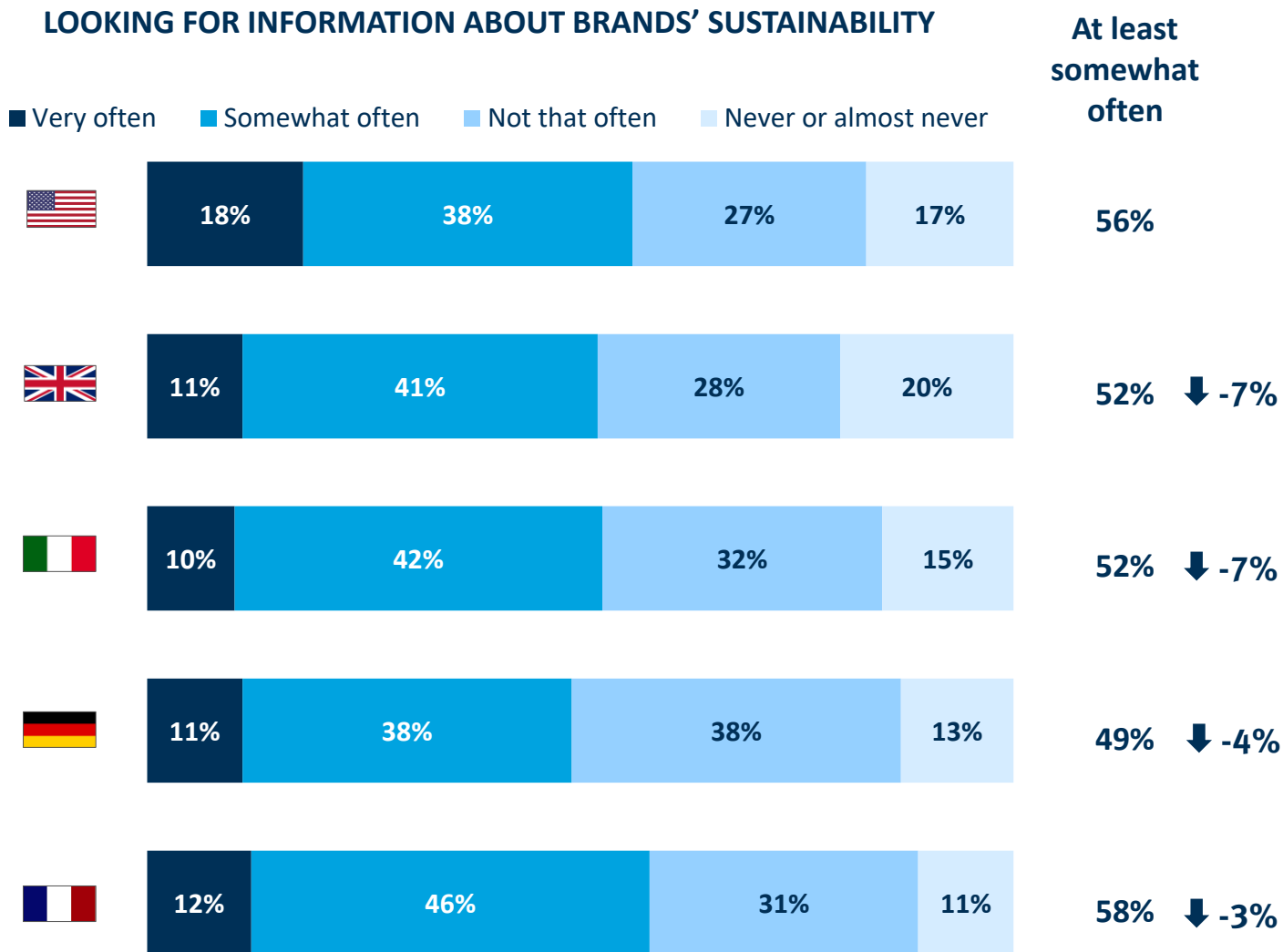
Nearly half of French consumers feel brands have become more concerned with their environmental impact; yet, nearly two in five also feel brands have become more profit-focused

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



Most U.S. ACLBP continue to look for sustainability practices when looking for information about a brand (56%, flat y/y), while ACLBP in all four European countries surveyed are less likely than a year before to look for sustainability practices

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

Sustainability Index Score – Brands Included

We measured sustainability perceptions for 50 total brands:

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

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