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# FOUR PAWS Wear It Kind 2024 – Merged

YouGov®

Prepared for :



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# ► Methodology

# Methodology

- This study was conducted online between 3rd - 18th April 2024, as part of a global study in 12 markets: Austria, Germany, Switzerland, UK, Spain, France, Italy, Bulgaria, Netherlands, Australia, US and South Africa.
- The sample in this market report comprised a nationally representative sample of 10,891 adults aged 18 years and older in the following countries: Austria (n=1011), Germany (n=1004), Switzerland (n=504), UK (n=1075), Spain (n=1055), France (n=1014), Italy (n=1013), Bulgaria (n=548), Netherlands (n=1013), Australia (n=1048), US (n=1038) and South Africa (n=568).
- YouGov designed the questionnaire in collaboration with FOUR PAWS, a copy of which has been included in this report.
- Please refer to the [crunch dashboard](#) for accompanying charts.

# ▶ **Key topline**

# Key topline

## Awareness of animal cruelty issues

- Globally (i.e. across all 12 markets), nearly two-thirds (65%) of adults are aware of animal cruelty issues in the fashion industry. Women are more likely to be aware than men (68% compared to 61%).
- Swiss adults (83%) and Austrian adults (80%) are most aware of any animal cruelty issues in the fashion industry, while Australians (48%), US adults (49%), and Spanish adults (49%) are the least aware in this regard.
- Gen Z and Millennials are more likely than older generations to be aware of animal cruelty issues (72% and 71% respectively compared to Gen X 62%, Baby Boomers 58%, and Silent 46%).

# Key topline (continued...)

## Animal welfare and treatment concern levels in the fashion industry

- The category global adults (i.e. across all markets) are most concerned about with regards to the welfare and treatment of animals involved is fur (from mink, fox, raccoon dog, etc.), with eight in ten (81%) very or fairly concerned. Swiss adults and Italians are most concerned about this (CH 90%, IT 90%), followed closely by Austrians (89%). Conversely, those in the US and AU are the least concerned (68% and 67% respectively).
- This is followed by exotic leather (from crocodiles, snakes, etc.), with three-quarters (75%) very or fairly concerned. Swiss adults, Austrians and Germans are most concerned about this with over eight in ten concerned (CH 85%, AT 84%, DE 84%), with those in the US and AU being the least concerned (58% respectively).
- Seven in ten (69%) global adults are concerned about animal welfare and treatment in exotic feather (from peafowl, ostriches, etc.) - South African adults are the most concerned (80%), while Bulgarians are the least concerned (55%).
- Three-fifths (59%) of global adults are concerned about animal welfare and treatment in feather/ down (from geese, ducks, etc.) - South Africans and Italians are the most concerned (73% and 72% respectively), while Bulgarians are the least concerned (43%).
- Nearly six in ten global adults (57%) are concerned about animal welfare and treatment in domestic animal leather (from bovine/cow, sheep, goat, etc.) - again, South Africans and Italians are the most concerned (74% and 73% respectively), while Swiss adults are the least concerned (44%).
- Half (50%) of global adults are concerned about animal welfare and treatment in cashmere (from cashmere goats) - South African adults are the most concerned (72%), while UK adults and Bulgarians are the least concerned (UK 41%, BG 40%).
- Just a third adults globally (33%) are concerned about animal welfare and treatment in wool (from sheep). Nearly three in five (58%) South Africans are concerned, the highest out of all markets, while only 23% of Swiss and Dutch adults are concerned, the lowest of all markets.

# Key topline (continued...)

## Familiar with 'mulesing'

- Only one in six (18%) global adults say they are familiar with a common farming procedure known as 'mulesing' (otherwise known as 'live lamb cutting'), which is practiced on most wool-producing merino sheep in Australia, including 8% who know its meaning and 9% who are not 100% sure what it means.
- South Africans (43%) and Australians (41%) are most likely to say they are familiar 'mulesing' compared to adults from other countries, while UK adults, Dutch adults and Germans are least likely to say they are familiar with 'mulesing' (9% respectively).
- Gen Z and Millennials are more likely than older generations to be familiar with 'mulesing' (21% respectively compared to Gen X 16%, Baby Boomers 14%, and Silent 15%).

## Retailers should phase out use of mulesed wool

- After learning about the practice of 'mulesing' in Australia and the availability of pain-free alternatives, four in five (80%) adults globally agree that retailers sourcing wool should phase out their use of wool from mulesed sheep, with over three-fifths (62%) *strongly* agreeing.
- Swiss adults and Italians are most likely to agree with this (88% respectively), while Bulgarians are the least likely to agree (57%).
- Women are more likely to *strongly* agree than men (68% compared to 56%).
- Interestingly, Gen Z are least likely to agree with this (75%) compared to their older counterparts.

# Key topline (continued...)

## Attitudes towards animal welfare

- Globally, over seven in ten (72%) say fashion brands should be responsible for assuring animal welfare standards are upheld throughout their supply chains. Four in five (79%) UK adults agree with this attitude, the highest across all markets, followed closely by Spanish and French adults (78% respectively).
- Over half (53%) of global adults say fashion brands should be transparent about their standards when it comes to animal welfare. Again, most likely among UK adults (63%).
- Half (50%) of global adults say companies should give animal protection equal priority to environmental protection and social standards (working conditions) within their Corporate Social Responsibility strategies and policies. South Africans are the most likely to say this (63%).
- Over two-fifths (44%) of adults globally say brands need to better care for the animals in their supply chain – with Swiss adults most likely to say so (56%), followed by UK adults (53%).
- While over a third (36%) say they will choose one fashion brand over another if they prioritise animal welfare - again, most likely among Swiss adults (48%), followed by French adults (45%).
- Only one in ten (9%) say fashion brand or animal welfare certification claims can be trusted at face value – with South Africans most likely to say this (14%), followed closely by Australians (13%) and Dutch adults (12%).



# Key topline (continued...)

## View on fur farming and trade in the country

- Globally, nearly three in five (57%) adults believe that both the farming, import and the sale of fur should be banned in their country, while one in ten believe that fur farming, import and sales should continue (10%). A similar proportion say the country should ban the import and sale of fur but allow farming of fur locally (10%), while only 4% say the country should ban farming of fur locally but allow the import and sale of fur. One in five (19%) are unsure about their view on this.
- Italians are the most likely to say both the farming, import and the sale of fur should be banned in their country (78%), while US adults are the least likely to say so (33%).
- Women are more likely than men to believe that both the farming, import and the sale of fur should be banned in their country (64% compared to 49%).
- Baby Boomers are the most likely generation to say both the farming, import and the sale of fur should be banned in their country (67%).

# Key topline (continued...)

## Fashion purchasing habits

- Two-thirds (68%) of global adults are conscious about animal welfare, including over a-fifth who say they currently seek out or purchase fashion items with animal welfare credentials (22%), a similar proportion (19%) who say they would buy more animal-free fashion if they had more access to sustainable alternatives, and over a quarter (27%) who say they have decided to avoid animal-based fashion products all together.
- Italians and South Africans are the most likely to be conscious about animal welfare (79% respectively), while US residents are the least likely (56%) to be conscious about animal welfare.
- One in six (16%) global adults say they currently seek out higher quality/ more durable fashion items that also have higher animal welfare credentials, with Dutch adults being the most likely (30%), and US adults being the least likely (11%).
- 6% of adults globally currently only purchase products made from animal derived materials that have been certified by an animal welfare standard, with South Africans being the most likely (11%), and Germans being the least likely (3%).
- South Africans are the most likely to say they would buy more animal-free fashion if they had more access to sustainable alternatives (28%), while Germans are the least likely to say so (12%).
- Furthermore, Italians are the most likely to say they have decided to avoid animal-based fashion products all together (37%), while Dutch adults are the least likely to say so (14%).
- One in ten (9%) adults globally currently choose cheap or fast fashion items including those made from animal products, with Australians being the most likely (15%), and French adults (5%) being the least likely.
- A similar proportion (8%) say they currently seek out higher quality/ more durable fashion items, regardless of their animal welfare credentials, with French adults being the most likely to say so (15%) and UK adults, Bulgarians and Italians are the least likely to say so (6% respectively).

## Key topline (continued...)

Fashion companies should reduce the use of animal derived materials and invest in alternatives and transition to sustainable animal-friendly material alternatives

- Eight in ten (81%) adults globally agree that fashion companies should reduce the use of animal derived materials and invest in alternatives and transition to sustainable animal-friendly material alternatives (such as recycled or plant-based materials), including half (51%) who *strongly* agree with this.
- Italians are the most likely to *strongly* agree with this (66%), while Australians and US adults are the least likely to *strongly* agree with this (38% respectively).
- Women are more likely than men to *strongly* agree with this (57% compared to 44%).

# ▶ Questionnaire

*Base: All Country Adults*

Question type: **Single**

[Vlabel - A. Awareness of animal cruelty in fashion industry]

**[CFW\_Q1]** Are you aware of any animal cruelty issues in the fashion industry?

**Please select one option only**

- <1> Yes
- <2> No

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*Base: All Country Adults*

Question type: **Grid**

#row order: randomize #column order: reverse(\$sreverse)

[Vlabel - D. Welfare/ animal treatment concern level]

**[CFW\_Q2]** How concerned are you about the welfare and treatment of animals in the following categories that provide items to the fashion industry?

**Please select one option per row**

- [D\_1] Wool (from sheep)
- [D\_2] Fur (from mink, fox, raccoon dog, etc.)
- [D\_3] Feather/down (from geese, ducks, etc.)
- [D\_4] Domestic animal leather (from bovine/cow, sheep, goat, etc.)
- [D\_5] Exotic leather (from crocodiles, snakes, etc.)
- [D\_6] Exotic feather (from peafowl, ostriches, etc.)
- [D\_7] Cashmere (from cashmere goats)
- <1> Very concerned
- <2> Fairly concerned
- <3> Not very concerned
- <4> Not at all concerned
- <977 fixed xor> Don't know

**Base: All Country Adults**

Question type: **Single**

#row order: reverse(\$sreverse)

[Varlabel - familiar with 'mulesing']

## [CFW\_Q03]

Are you familiar with a common farming procedure known as 'mulesing' (otherwise known as 'live lamb cutting'), which is practiced on most wool producing merino sheep in Australia?

**Please select one option only**

- |       |   |
|-------|---|
| <1>   | Yes, I'm familiar with the term and know what it means.           |
| <2>   | Yes, I'm familiar with the term, but not 100% sure what it means. |
| <3>   | I've heard of it but have no idea what it means.                  |
| <977> | I've never heard of it  |

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**Base: All Country Adults**

Question type: **Single**

#row order: reverse(\$sreverse)

[Varlabel - E. Agreement scale]

**[CFW\_Q04]** *Only done in Australia, 'mulesing' is a practice in which large areas of skin and flesh are cut off a lamb's bottom and tail to prevent the infestation of flies, known as 'flystrike'. It is one of the most invasive routine mutilations farmed animals are subjected to and causes lambs to experience days of pain. However, there are pain-free and tested methods available which are used by thousands of Australian wool growers. Breeding sheep who are flystrike resistant do not need to be mulesed and produce mulesing-free wool.*

After reading this, to what extent do you agree or disagree that retailers sourcing wool should phase out their use of mulesed sheep wool?

**Please select one option only**

- |                 |                   |
|-----------------|-------------------|
| <1>             | Strongly agree    |
| <2>             | Tend to agree     |
| <3>             | Tend to disagree  |
| <4>             | Strongly disagree |
| <977 fixed xor> | Not sure          |

**Base: All Country Adults**

Question type: **Multiple**

[Varlabel - Attitudes towards animal welfare]

**[Q5]** Which of the following statements best describe your attitudes towards animal welfare in the fashion industry?

**Please select all that apply**

- <1> Fashion brands should be responsible for assuring animal welfare standards are upheld throughout their supply chains
  - <2> I will choose one fashion brand over another if they claim to prioritise animal welfare
  - <3> Fashion brands should be transparent about their standards when it comes to animal welfare
  - <4> Brands need to better care for the animals in their supply chain
  - <5> Fashion brand or animal welfare certification claims can be trusted at face value
  - <6> Companies should give animal protection equal priority to environmental protection and social standards (working conditions) within their Corporate Social Responsibility strategies and policies
  - <944 fixed xor> None of the above
- 

**Base: All Country Adults**

Question type: **Single**

#row order: reverse(\$sreverse)

[Varlabel - View regarding fur farming]

**[Q6]** Which ONE of the following is closest to your view regarding fur farming and trade in your country?

**Please select one option only**

- <1> Both the farming, import and the sale of fur should be banned
  - <2> Only ban farming of fur locally but allow the import and sale of fur
  - <4> Only ban the import and sale of fur but allow farming of fur locally
  - <3> Fur farming, import and sales should continue
  - <977 fixed xor> Don't know
-

**Base: All Country Adults**

Question type: **Single**

#row order: reverse(\$sreverse)

[Vlabel - Current Shopping habits considering animal welfare]

**[CFW\_Q7]** How would you describe your current shopping habits and considerations about animal welfare in purchasing decisions?

**Please select the option that best applies to you**

- <1> I currently seek out higher quality/ more durable fashion items, regardless of their animal welfare credentials
- <2> I currently seek out higher quality/ more durable fashion items that also have higher animal welfare credentials
- <3> I currently only purchase products made from animal derived materials that have been certified by an animal welfare standard
- <4> I would buy more animal-free fashion if I had more access to sustainable alternatives
- <5> I have decided to avoid animal-based fashion products all together
- <6> I currently choose cheap / fast fashion items including those made from animal products
- <955 fixed> Other

**Base: All Country Adults**

Question type: **Dyngrid**

#column order: reverse(\$sreverse)

[Vlabel - Agreement Scale - Switch to sustainable alternatives]

**[CFW\_Q08]** Textile material production often goes hand in hand with food production (i.e. leather and beef, wool and lamb), and with over 80 billion animals farmed annually, animal agriculture is responsible for at least 16.5% of all greenhouse gas emissions. According to the UN Food and Agriculture Organisation (FAO), agriculture is one of the biggest emitters of methane, a highly potent greenhouse gas, and has reported that its emissions from agriculture are predicted to grow an additional 4% by 2030, with livestock accounting for more than 80% of this increase. Animal agriculture also takes up 77% of all agricultural land and is the biggest cause of deforestation of tropical forests globally, which in turn also accelerates global heating. Finally, new animal-free alternatives such as mycelium leather (known as mushroom leather) can have as little as 8% of the carbon footprint as bovine (cow) leather and avoids any animal suffering.

After reading this, to what extent do you agree or disagree with the following statement?

- [CFW\_Q8\_1] Fashion companies should reduce the use of animal derived materials, invest in alternatives and transition to sustainable animal-friendly material alternatives, such as recycled, or plant-based materials
- <1> Strongly agree
  - <2> Tend to agree
  - <3> Tend to disagree
  - <4> Strongly disagree
  - <977 fixed xor> Don't know



# Thank You

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