

01 OBJECTIVES AND METHODOLOGY

Objectives and Methodology

LAV is interested in exploring propensity to buy items of clothing manufactured with animal materials as opposed to alternative materials among aware buyers, i.e. buyers who have been apprised about the treatment of the animals from which such materials are derived.

For this purpose, BVA Doxa has conducted an international quantitative study to shed light on:

- **users' awareness** about the existence of alternative materials to those of animal origin
- **propensity to buy** among aware users
- the general **attitude** to the manufacture and purchase of clothing made of animal or alternative materials.

A customized survey was conducted on a sample of 3.636 cases representing a population between 18 and 50 years of age in 6 European countries:

Italy



France



UK



Netherlands



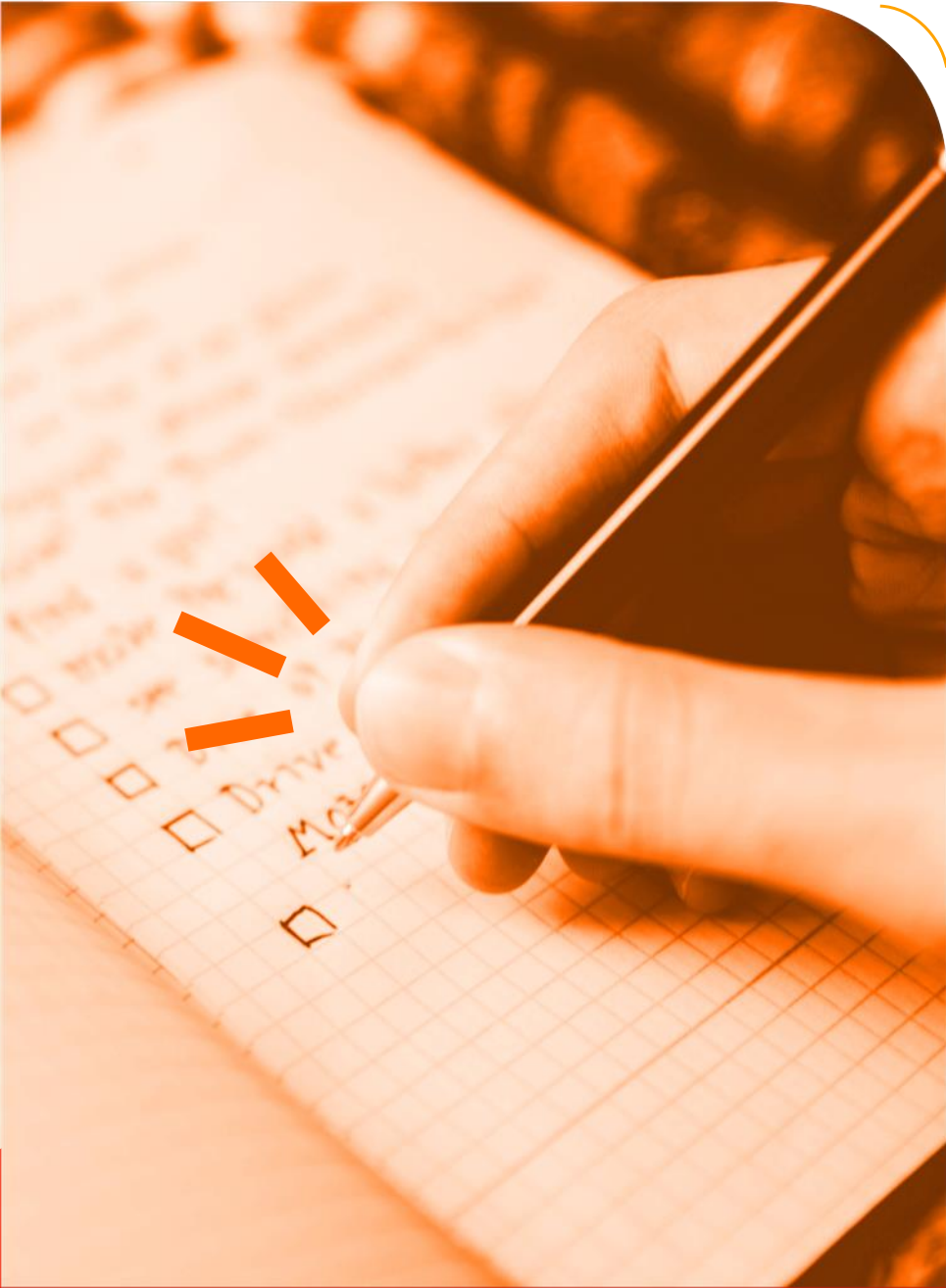
Germany



Spain



Interviews were conducted in February 2024 by means of CAWI system (Computer Assisted Web Interview) with a questionnaire provided by the Client and developed in collaboration with BVA Doxa.

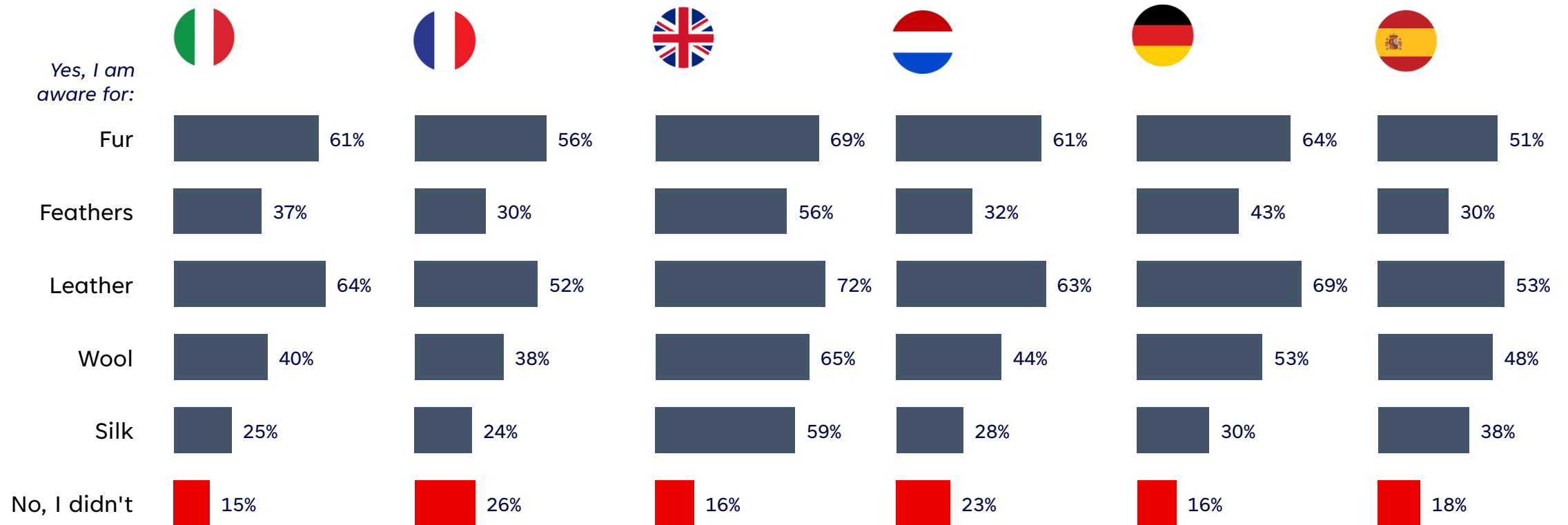


02 AWARENESS OF THE EXISTENCE OF ALTERNATIVE MATERIALS

Awareness of the existence of alternative materials

Materials of animal origin such as fur, feathers, leather, and animal yarns (wool, silk, angora, cashmere, mohair, etc.) are often used for the production of clothing, footwear and fashion accessories.

Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns?



D1. Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns? Multiple answers

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

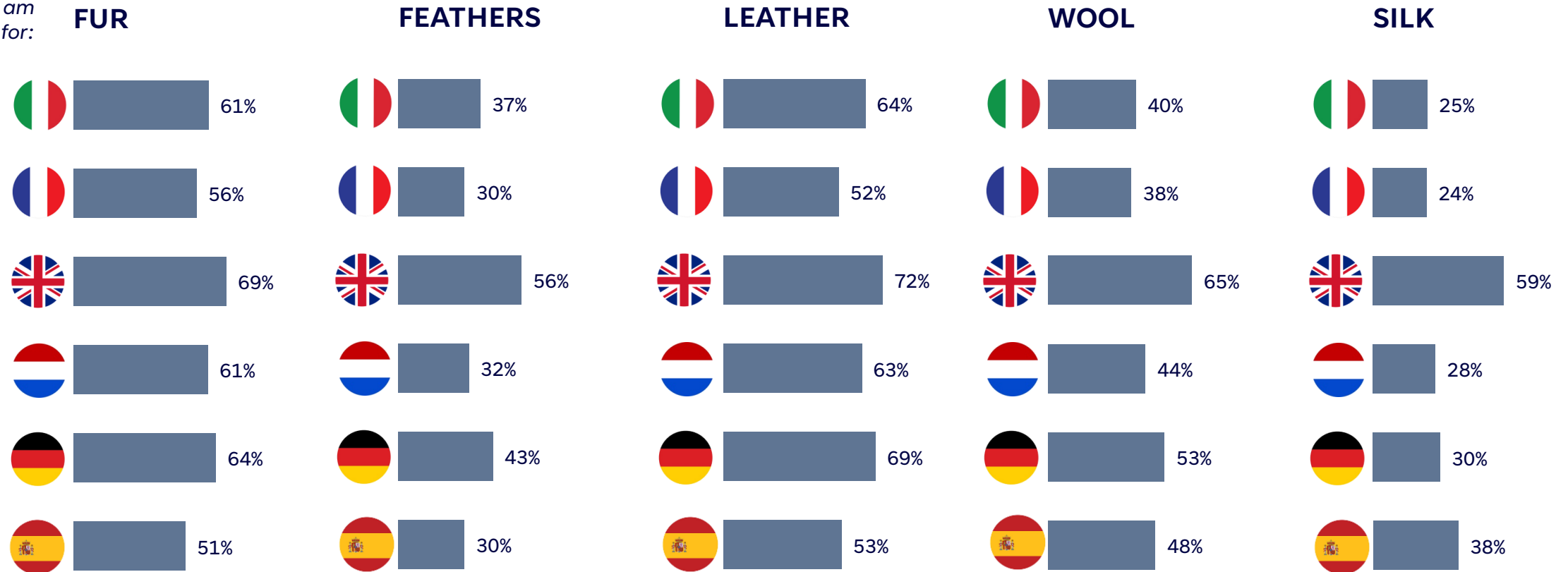
Awareness of the existence of alternative materials

Materials of animal origin such as fur, feathers, leather, and animal yarns (wool, silk, angora, cashmere, mohair, etc.) are often used for the production of clothing, footwear and fashion accessories.

Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns?

By material

Yes, I am aware for:



D1. Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns? Multiple answers

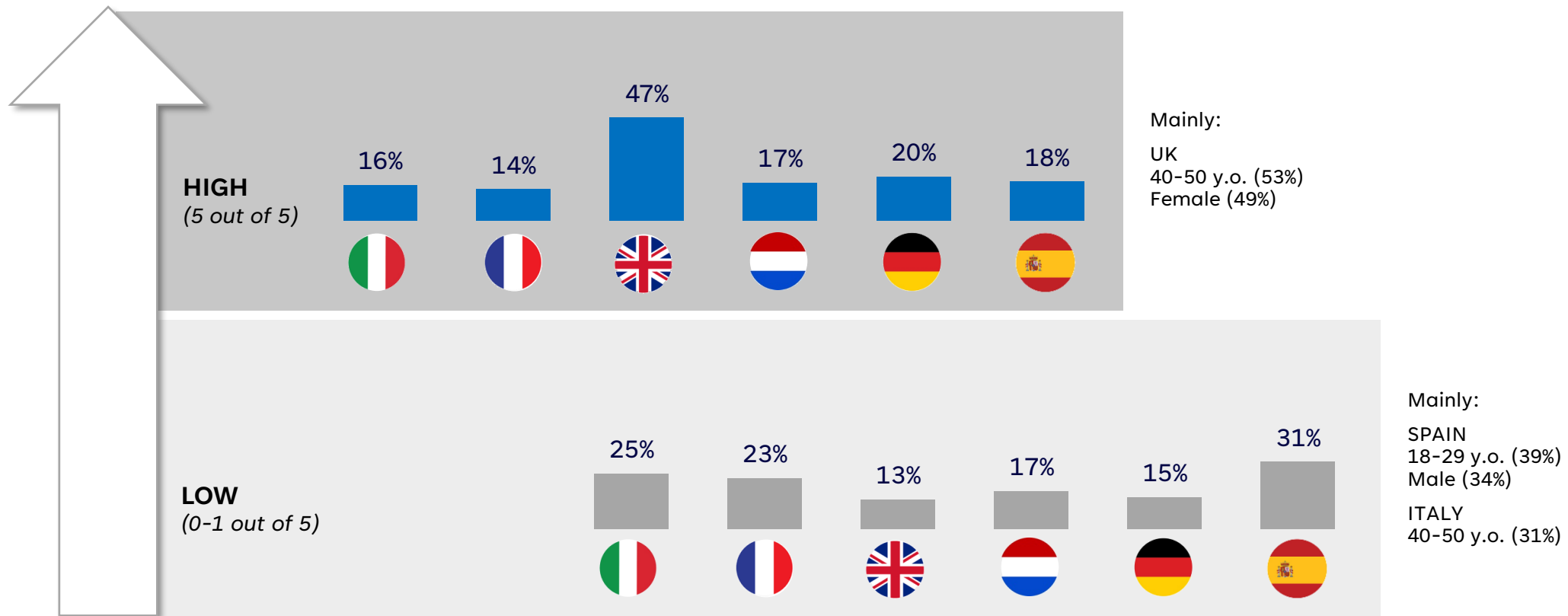
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Awareness of the existence of alternative materials

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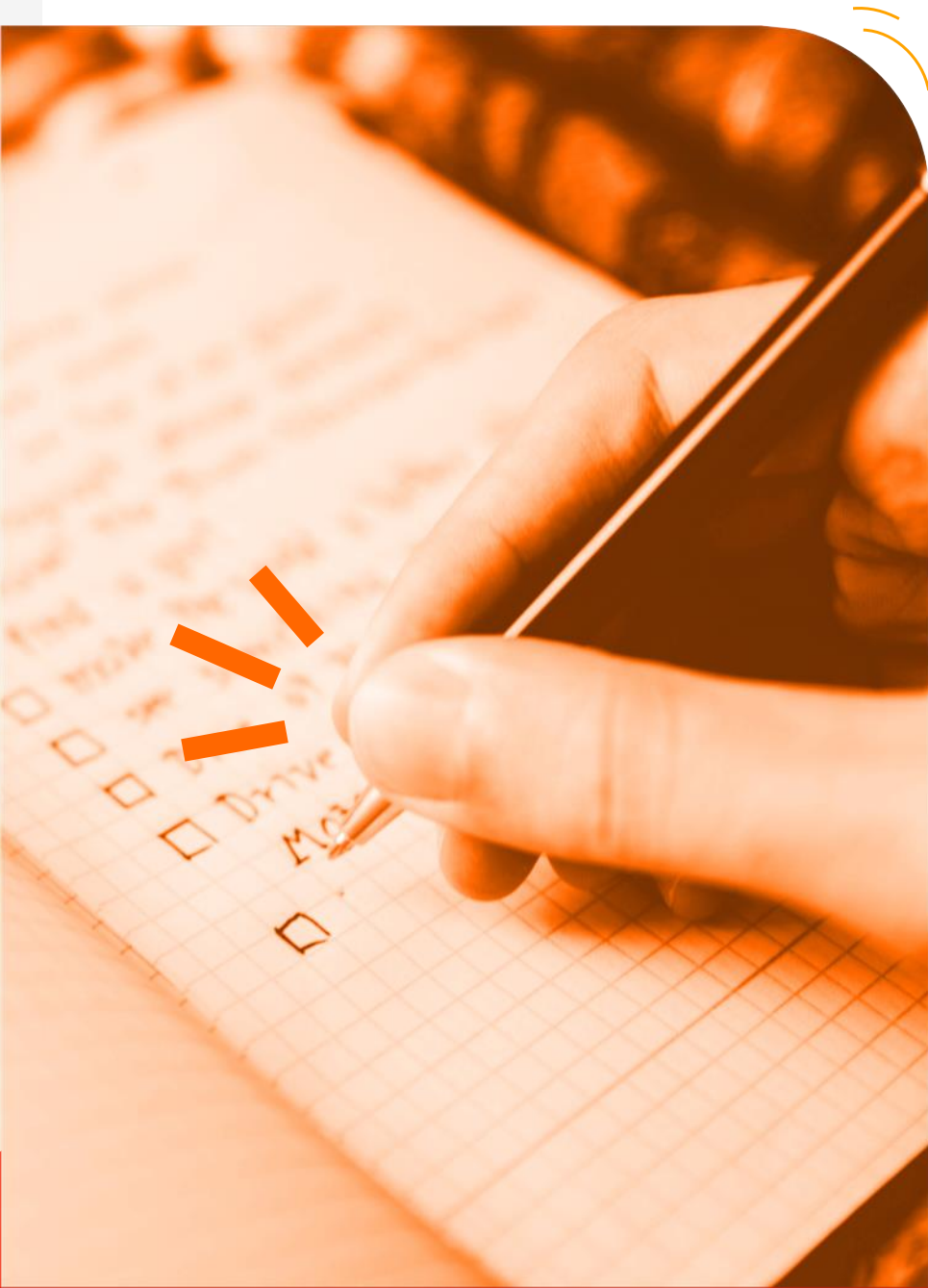
Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns?

Awareness index



D1. Did you know of the existence of alternative materials to fur, feathers, leather, animal yarns? Multiple answers

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)



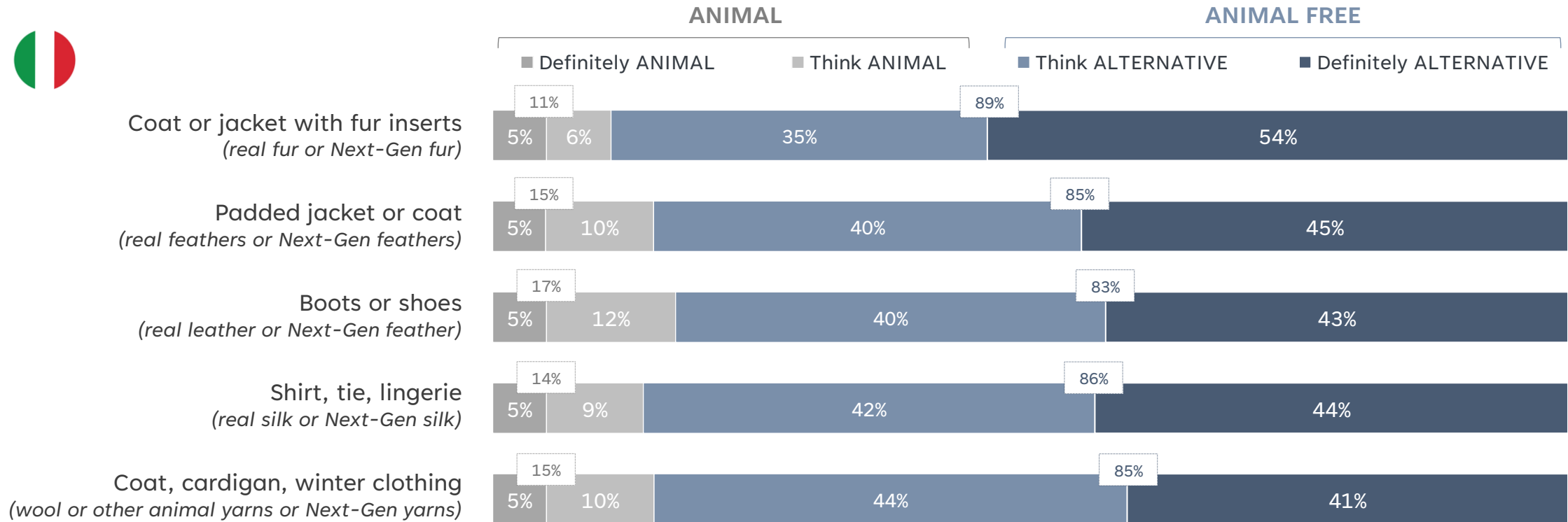
03 PROPENSITY TO BUY

Materials of animal origin come from the exploitation of animals that are often killed or made to suffer. Today, materials of animal origin can be avoided in favour of alternative materials known as “Next-Gen Materials”. These are innovative and Animal-Free materials (direct substitutes for fur, feathers, leather and hide, and animal yarns) created using biomimicry techniques to replicate the aesthetics and performance of materials of animal origin.

They can be of natural vegetable or artificial, synthetic origin; they have a lower environmental impact and pose a lower chemical risk to the consumer, providing similar or even greater comfort than materials of animal origin.

Propensity to buy | Italy

Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

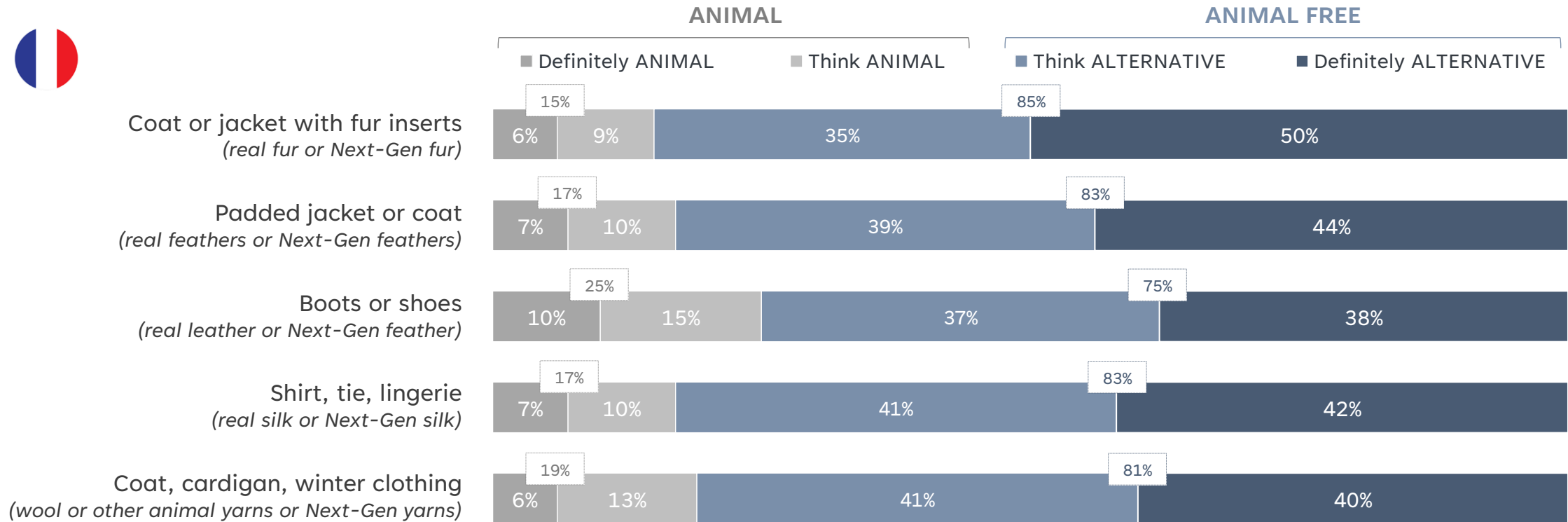


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in ITALY (608)

Propensity to buy | France

Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

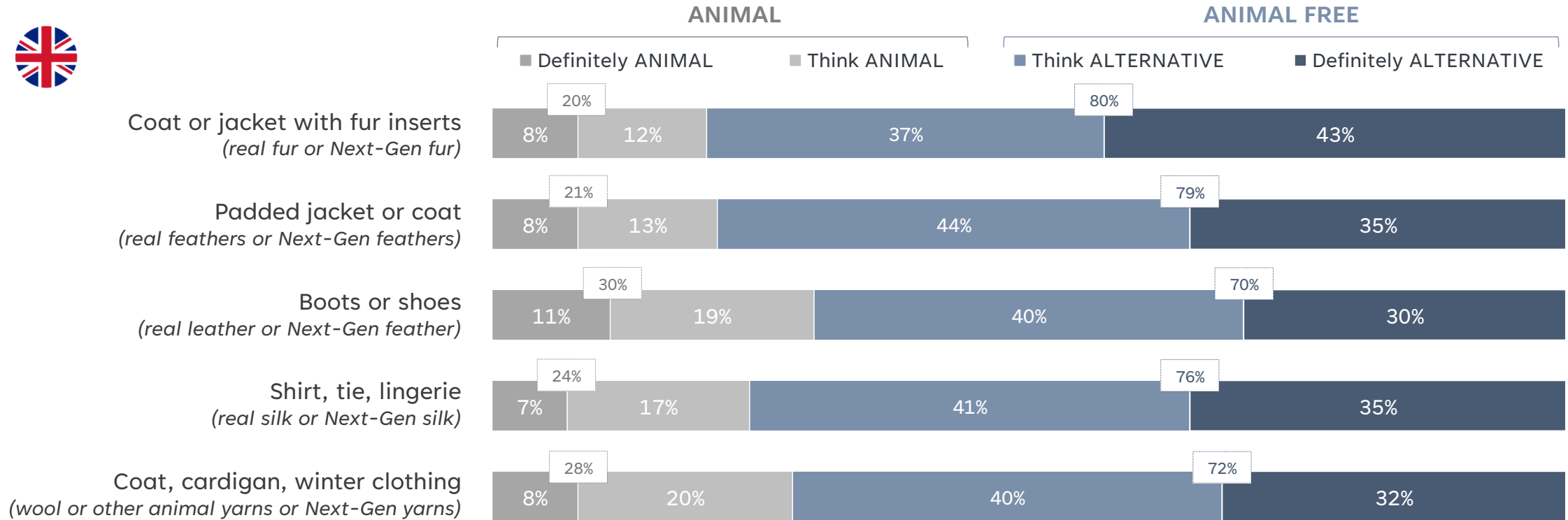


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in FRANCE (605)

Propensity to buy | UK

Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

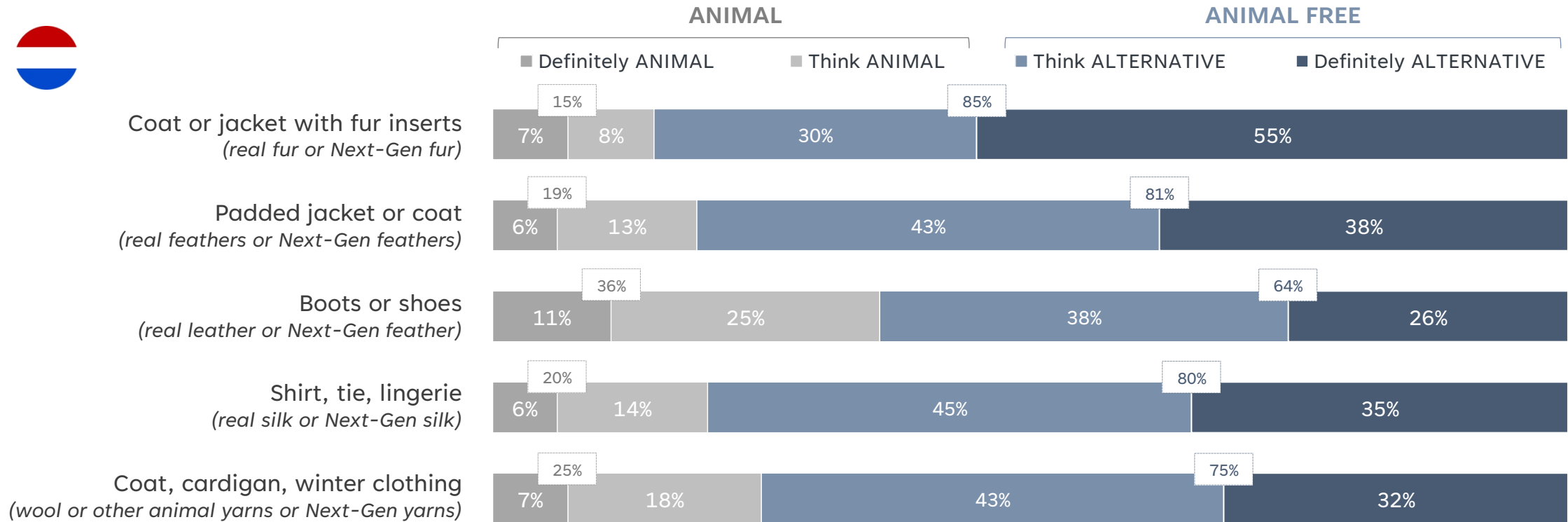


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in UK (609)

Propensity to buy | Netherlands

Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

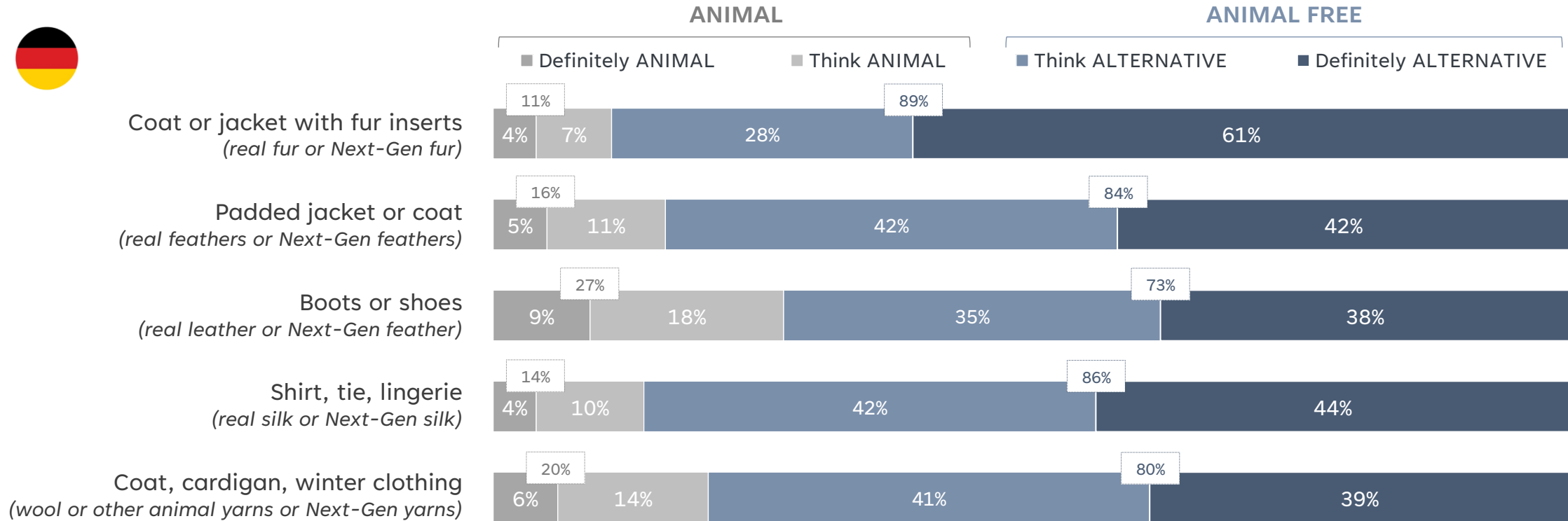


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in NETHERLANDS (602)

Propensity to buy | Germany

Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

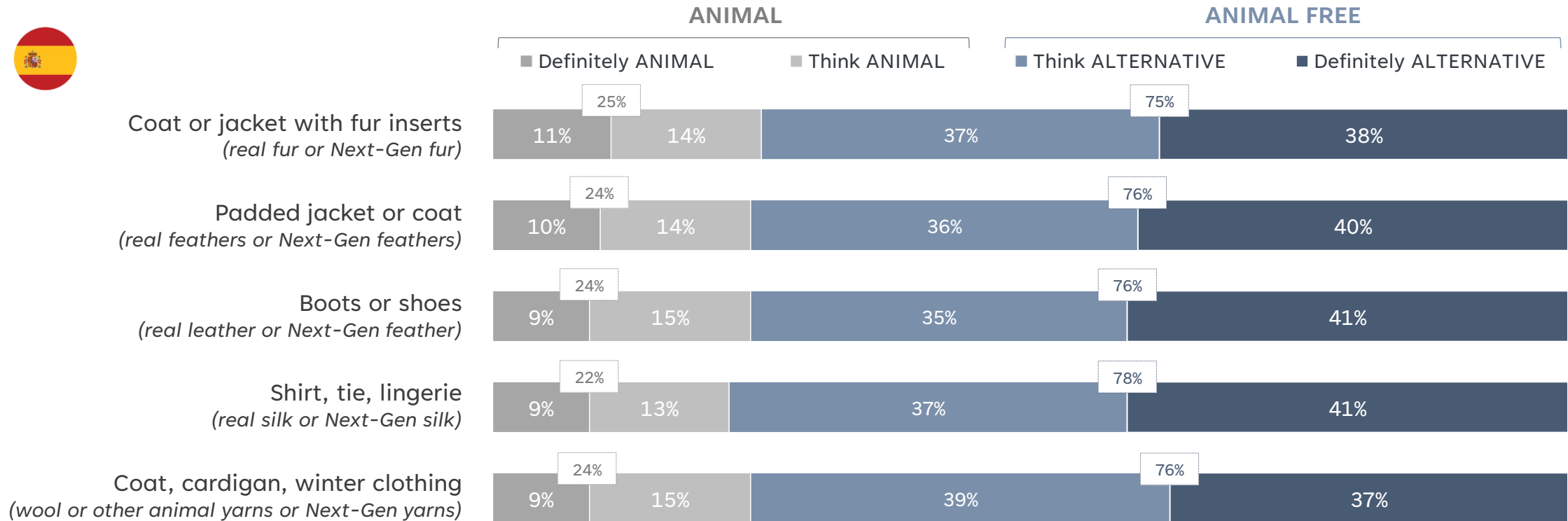


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in GERMANY (609)

Propensity to buy | Spain

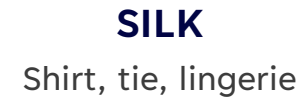
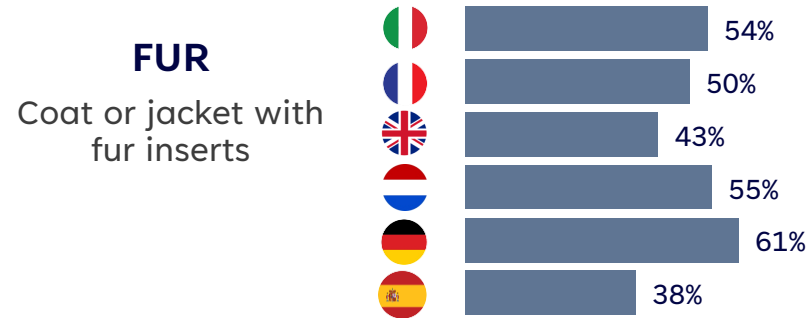
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D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in SPAIN (603)

DEFINITELY of choosing alternative materials

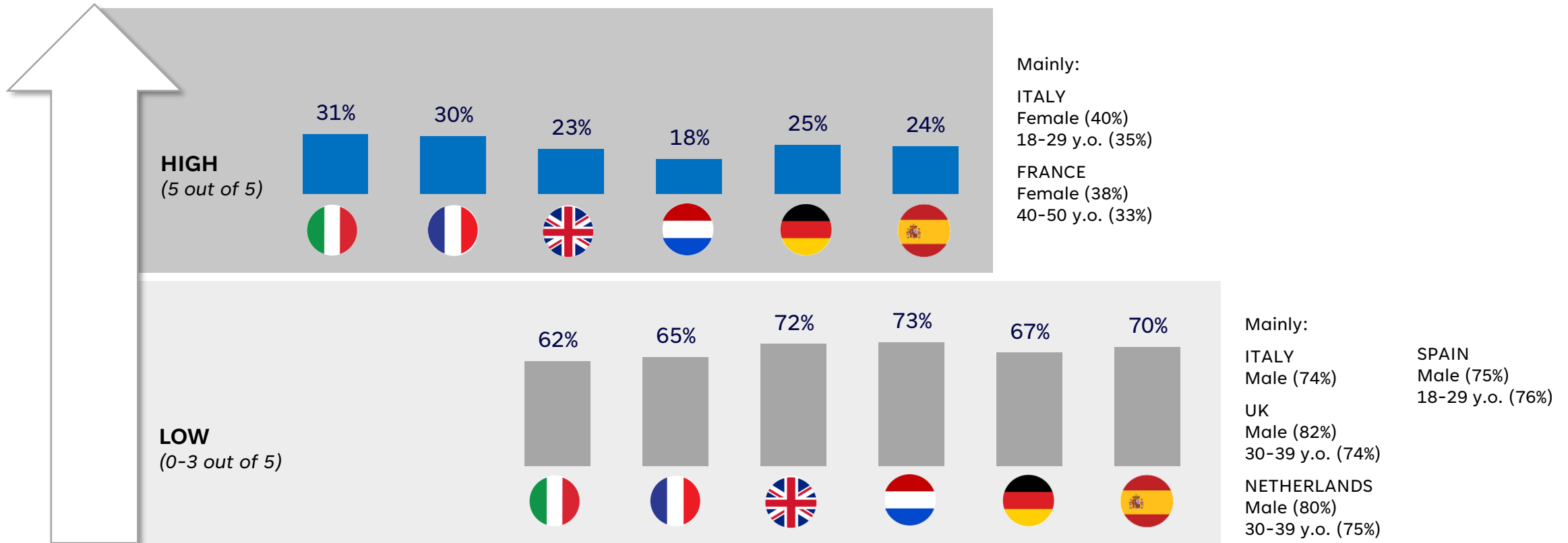


D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

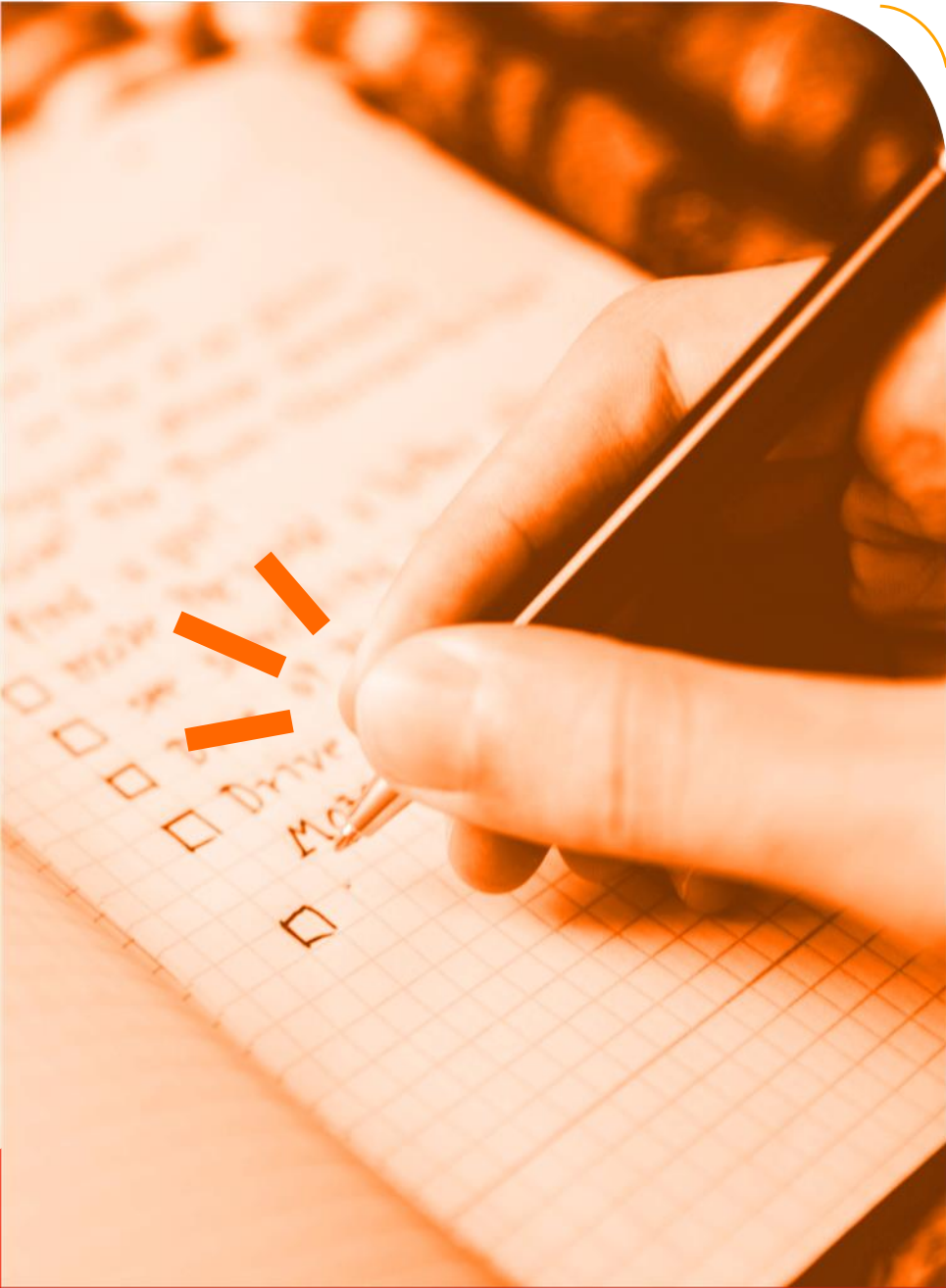
DEFINITELY propensity to buy alternative materials

DEFINITELY propensity to buy index



D2. Now that you have been given this information, if you were to buy an item of clothing, a pair of shoes or an accessory today and you were faced with the choice between materials of animal origin or alternative materials (Animal-Free), with the same level of comfort, which would you choose?

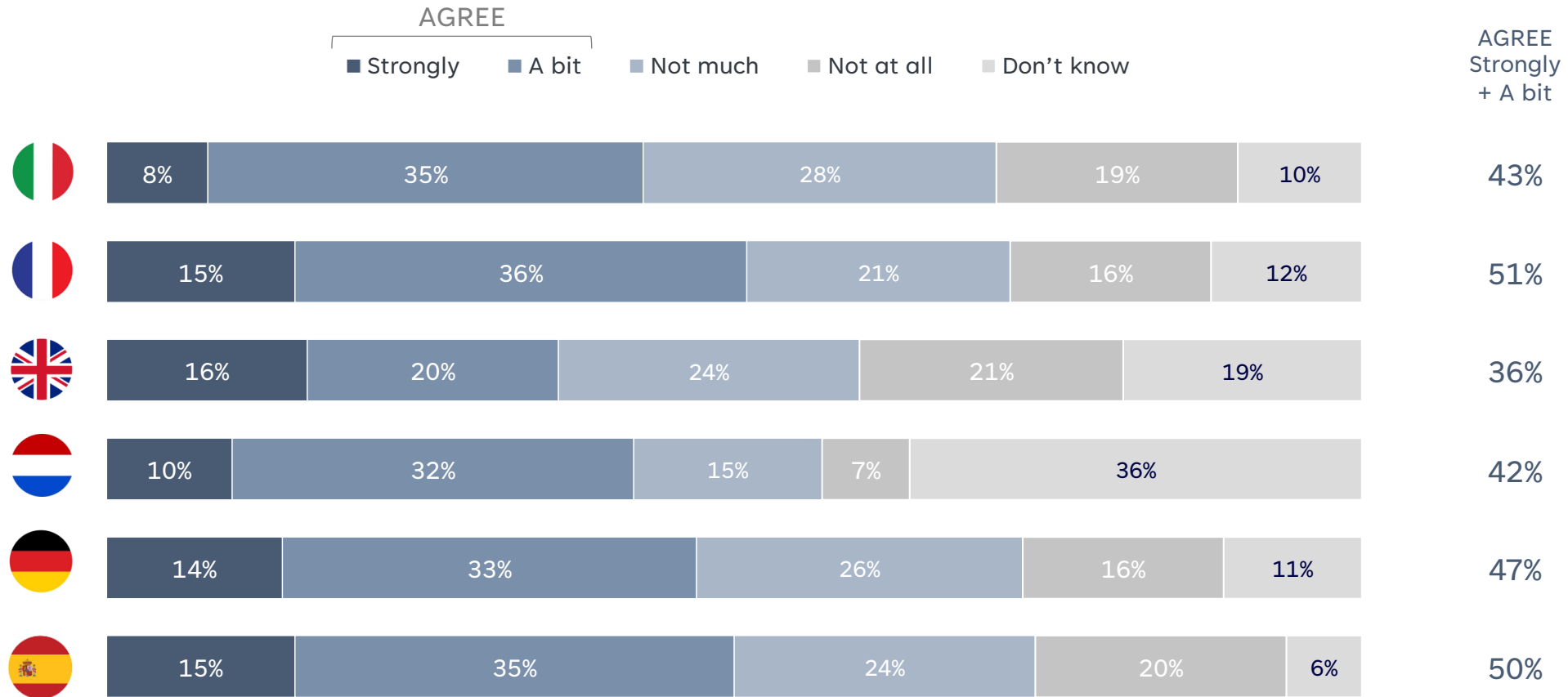
Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)



04 CLAIMED ATTITUDE

Claimed attitude | Availability

“If it becomes hard to find clothes made with alternative materials (Animal Free), I will definitely buy those made with materials of animal origin”

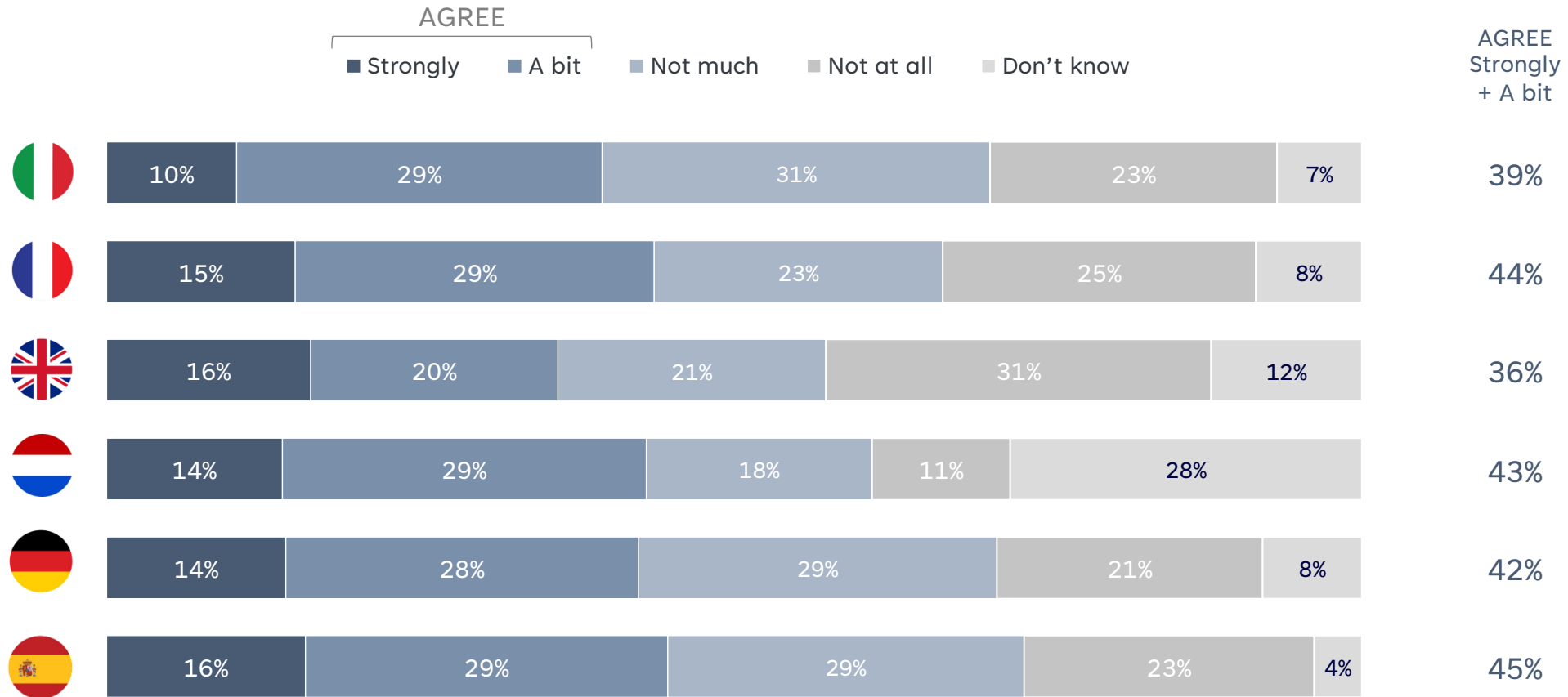


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Taste

“If I like the garment very much, it doesn't make any difference to me and I buy it even if it is made from materials of animal origin”

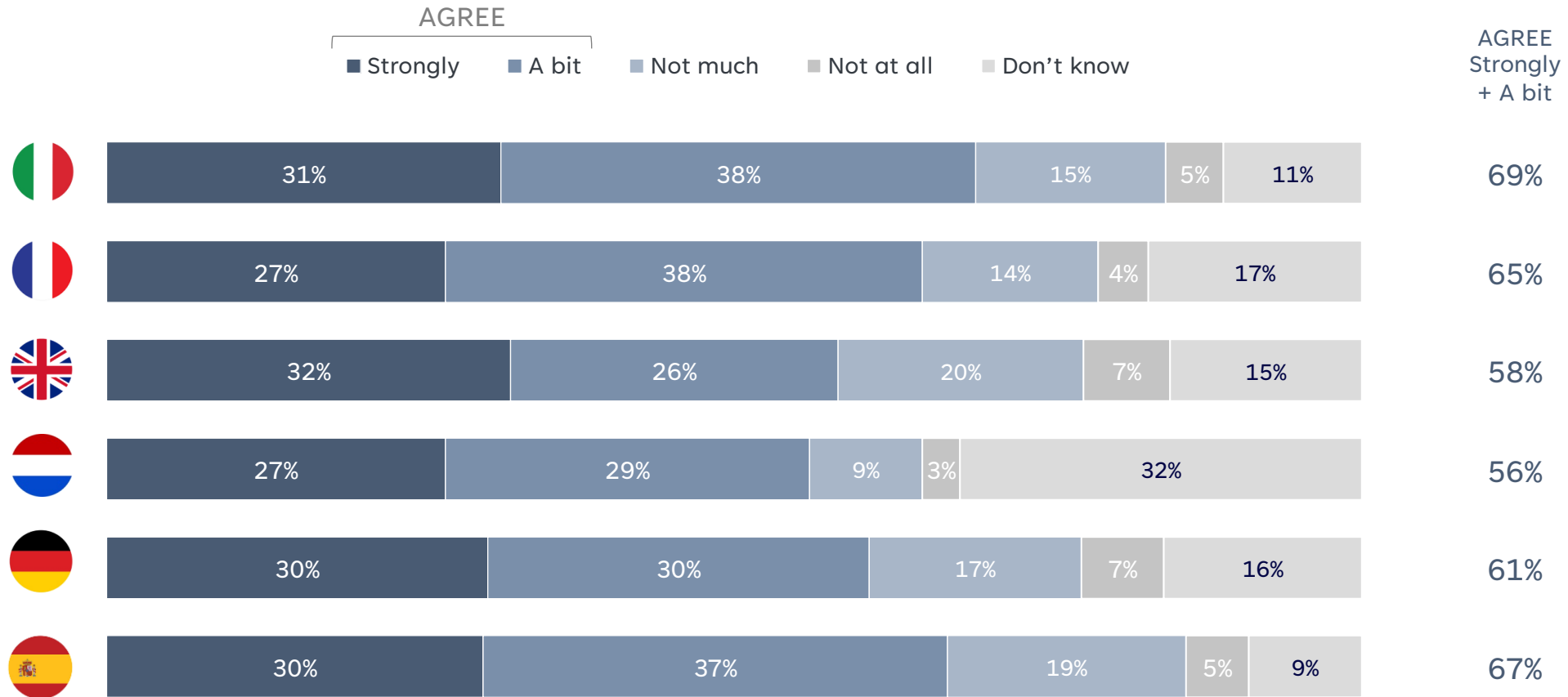


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Footwear comfort

“Shoes made of alternative materials (Animal Free) can really be just as comfortable, just as durable, as shoes made of real leather”

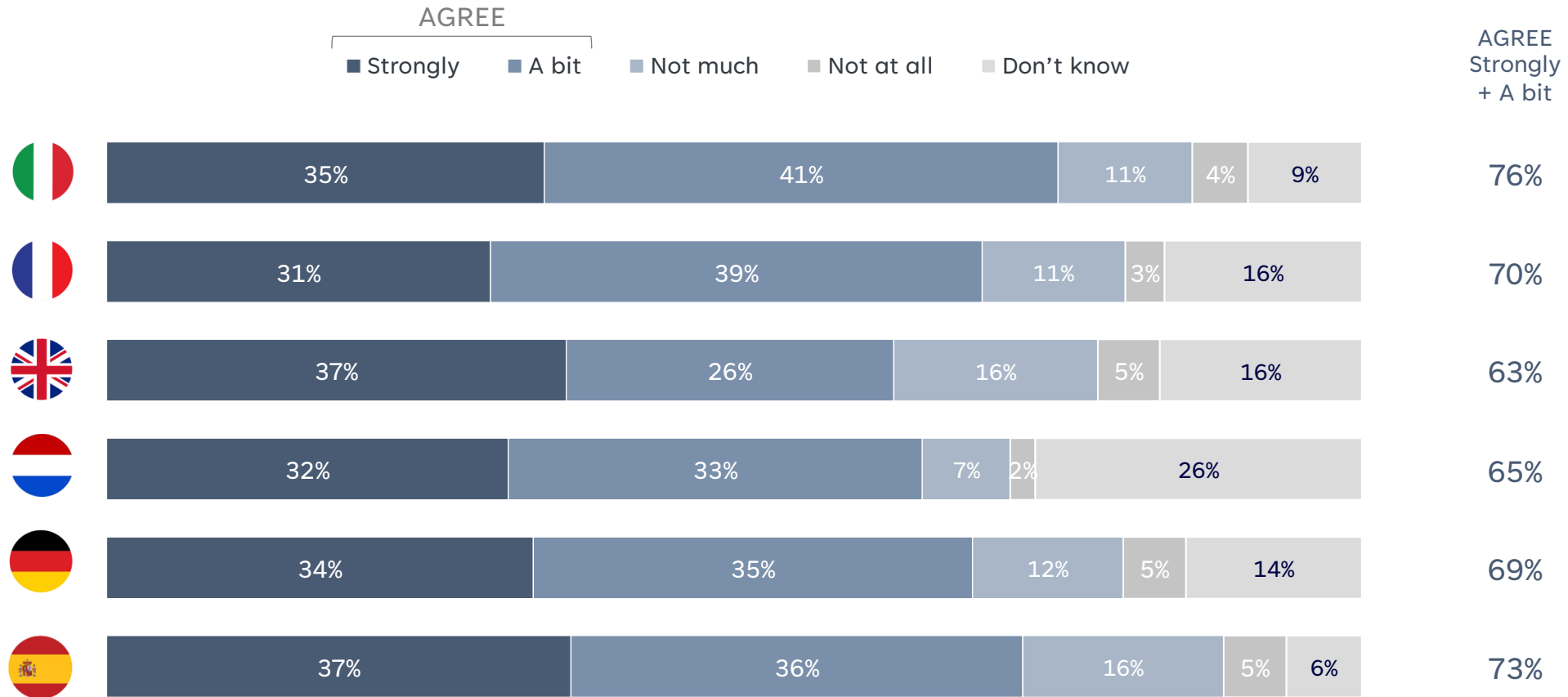


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Garments comfort

“Garments made of alternative materials (Animal Free) really can be just as comfortable and just as durable as those made of materials of animal origin”

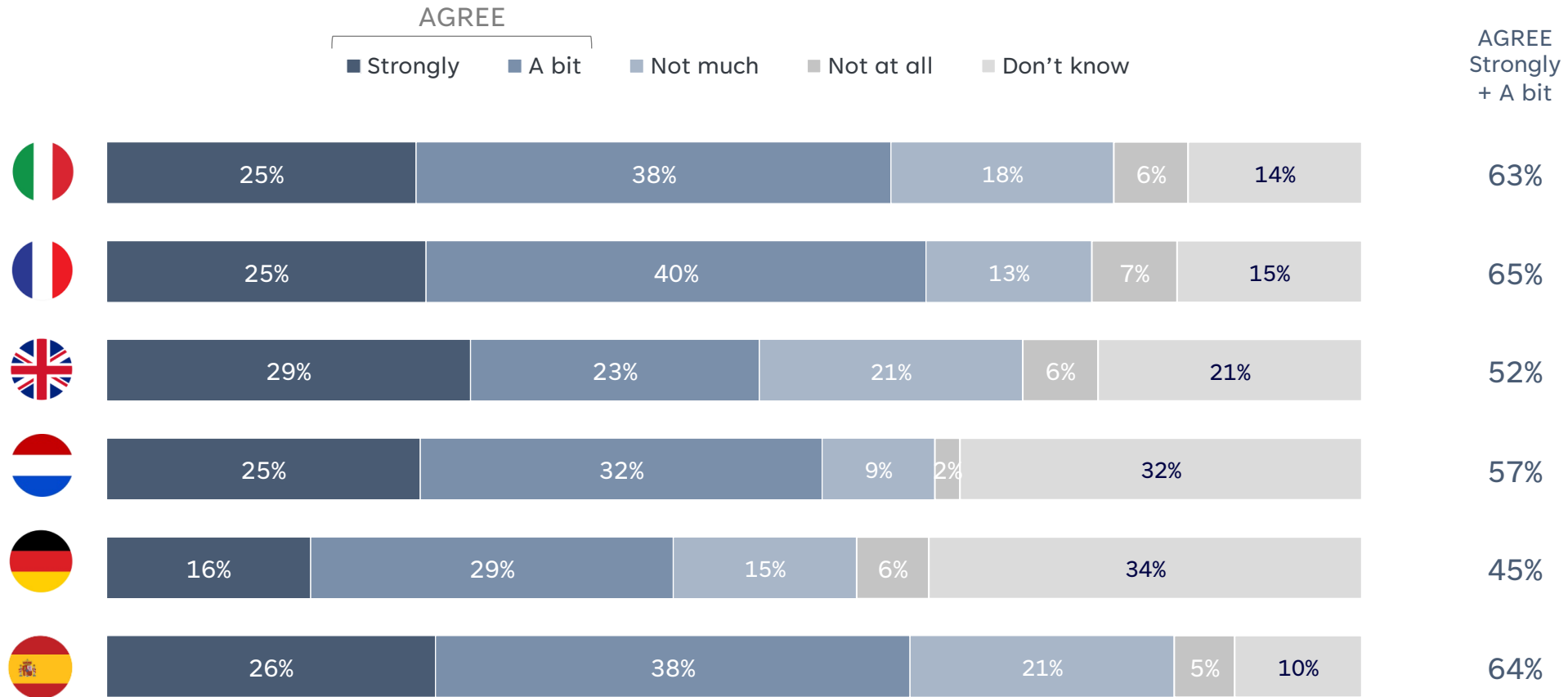


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Marketing

“When it says “Real Feathers” on the label, it only means that the jacket or coat is filled with animal feathers, it does not mean that it is more comfortable than others made from alternative materials (Animal Free)”

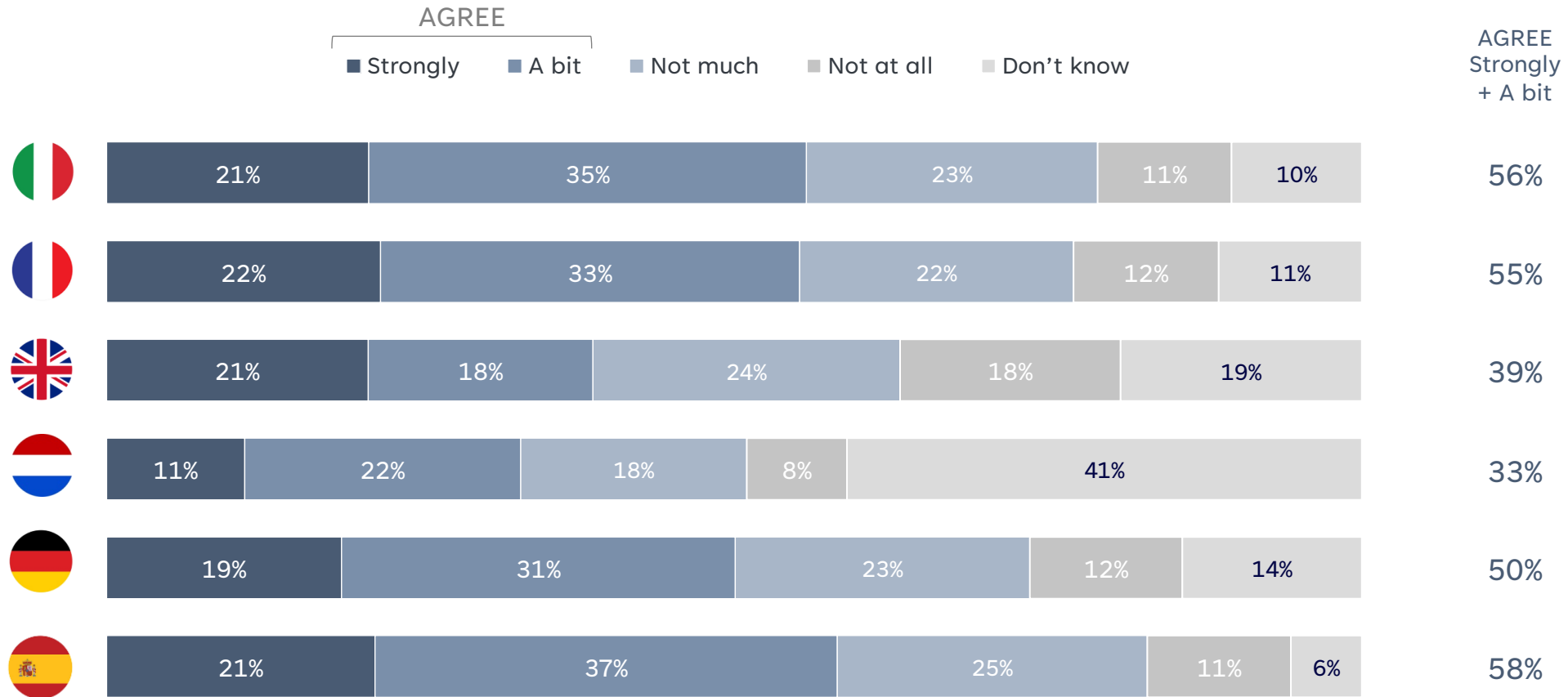


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Ethics

“Rather than buy a garment made from materials of animal origin, I change shop or brand”

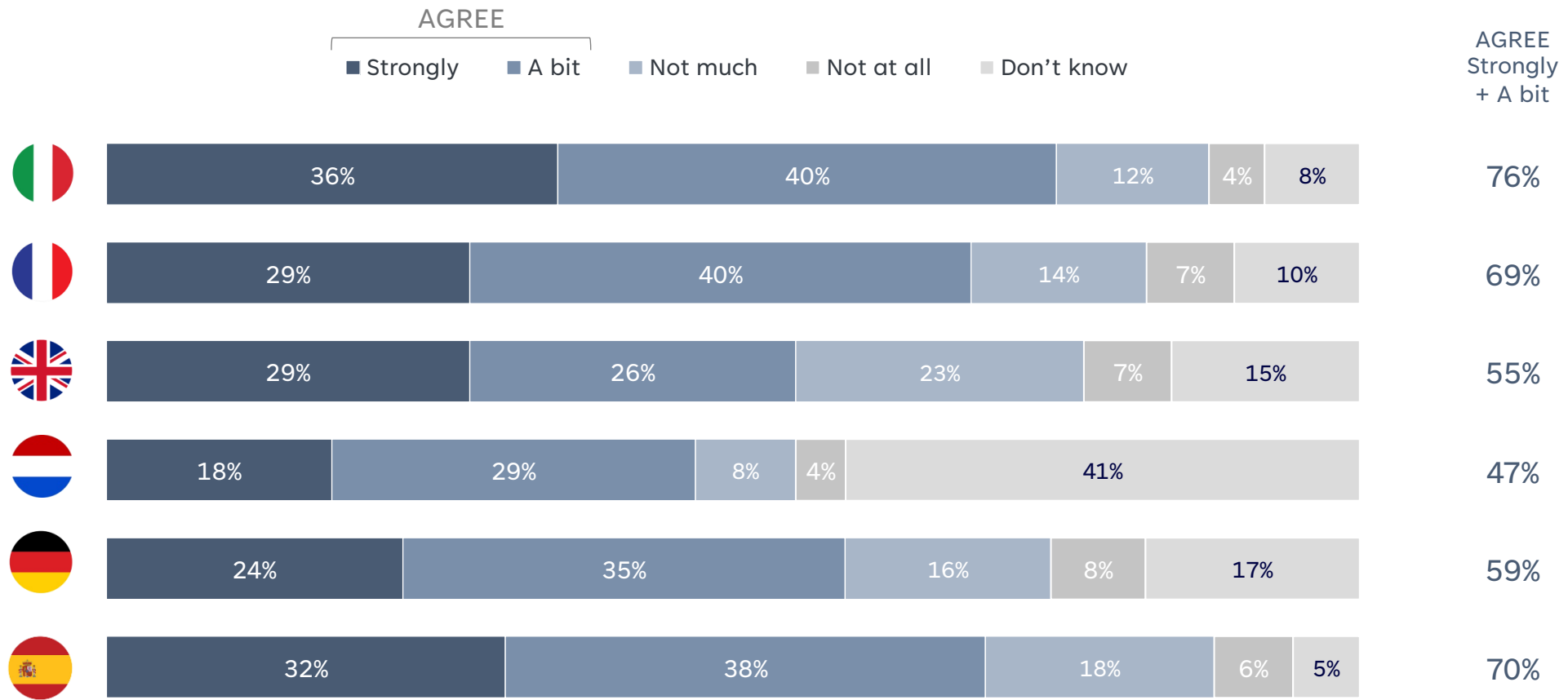


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude | Feeling

“Buying fashion products made from alternative materials (Animal Free) makes me happy and proud of myself and my choices”



D3. Indicate how much you agree with each of the following statements.

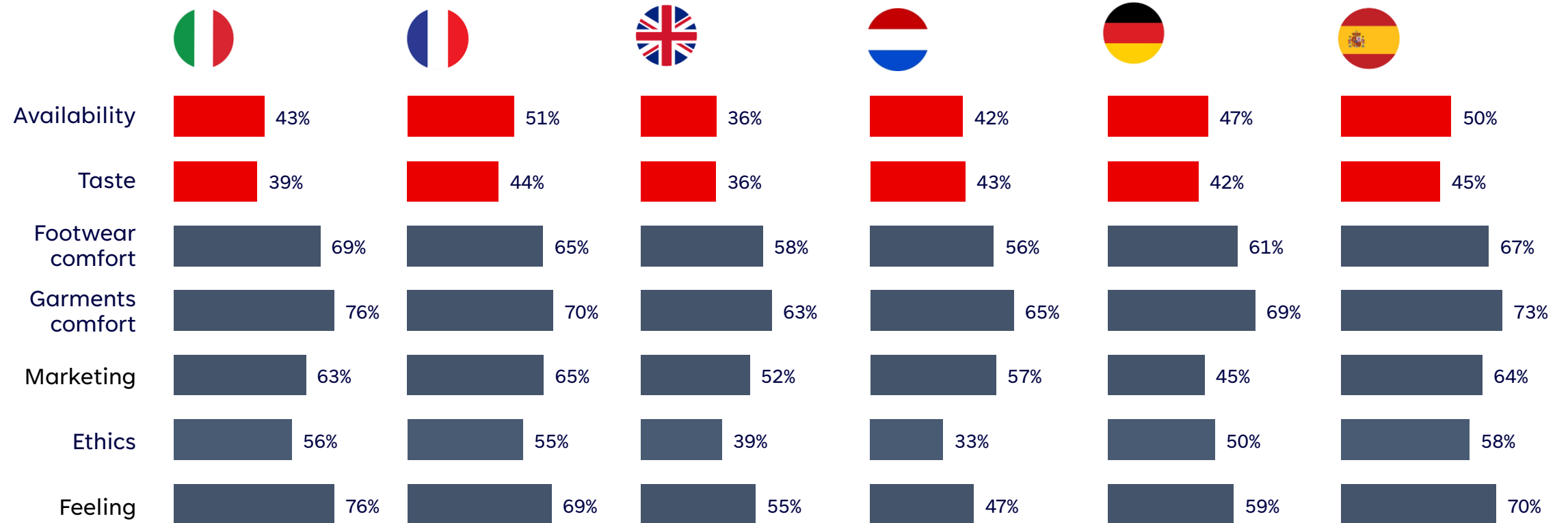
Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Overview of respondents' agreement | Summary table

Strongly + A bit agree

Attitude expressed through agreement with the item:

- Animal-free
- NON Animal-free

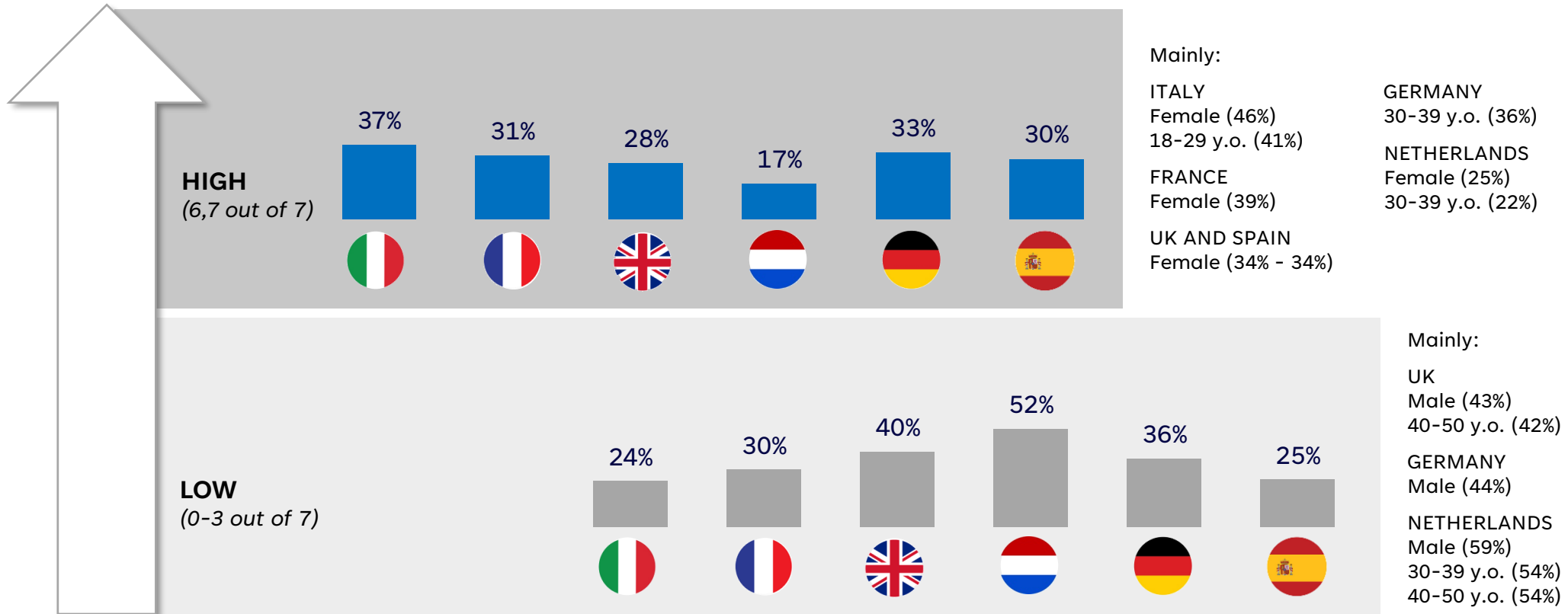


D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Claimed attitude

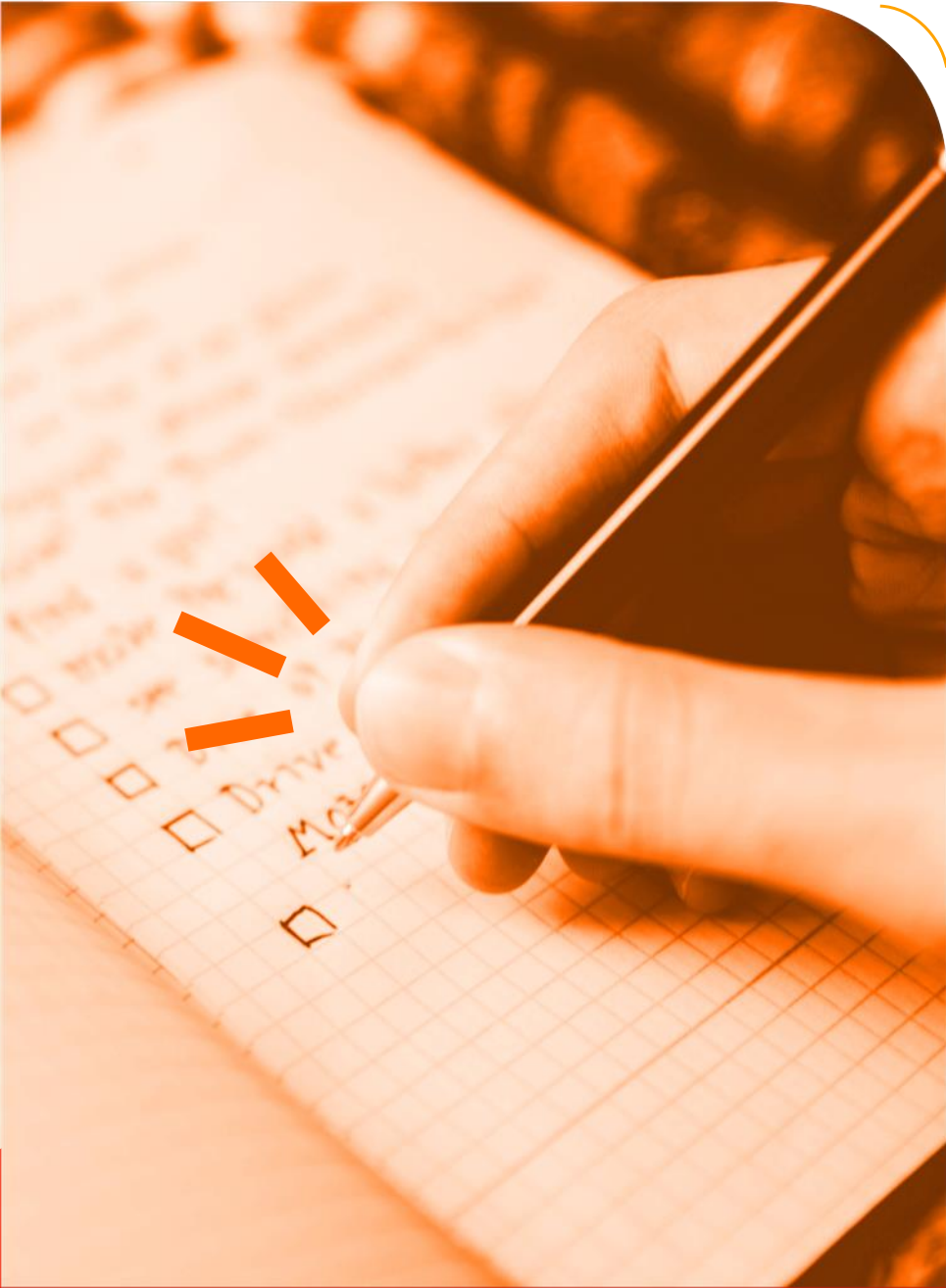
Animal-free attitude index*



D3. Indicate how much you agree with each of the following statements.

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

*The index was calculated based on agreement with 6 out of 7 items, excluding marketing

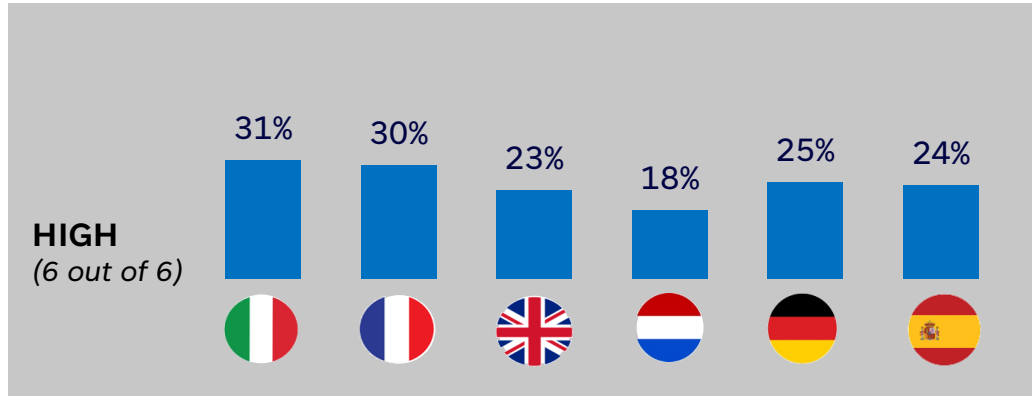


05 ACTUAL PROPENSITY TO BUY

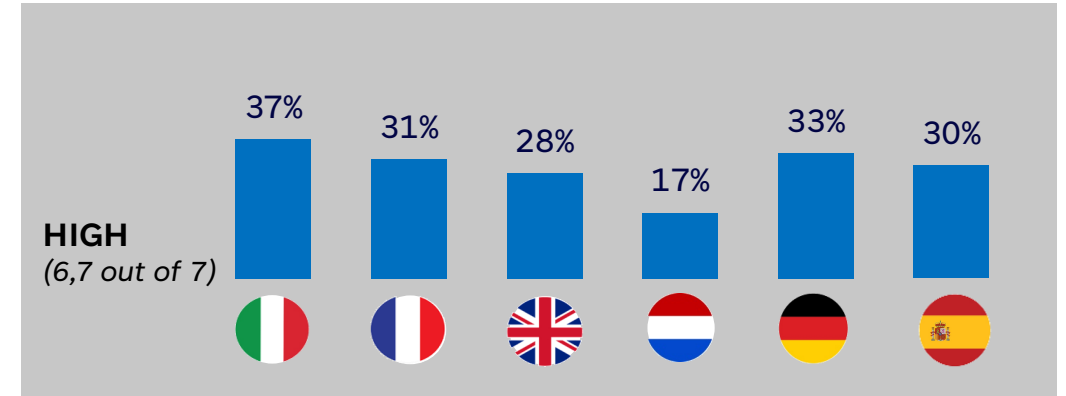
Actual propensity to buy

Share of respondents who are convinced about buying alternative materials

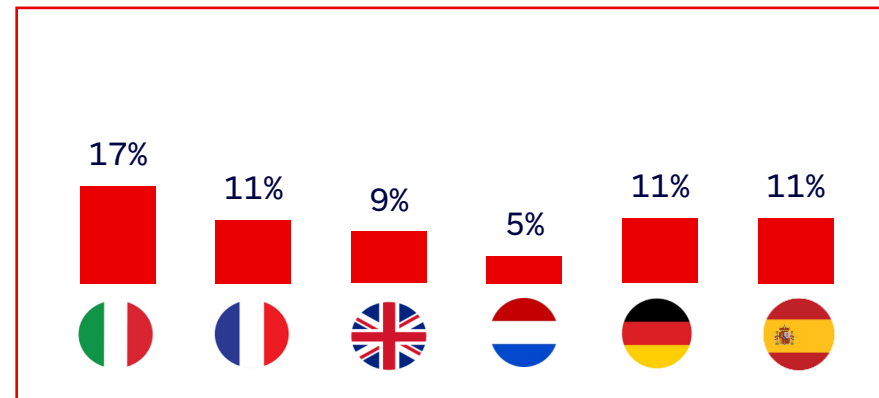
DEFINITELY propensity to buy alternative materials index



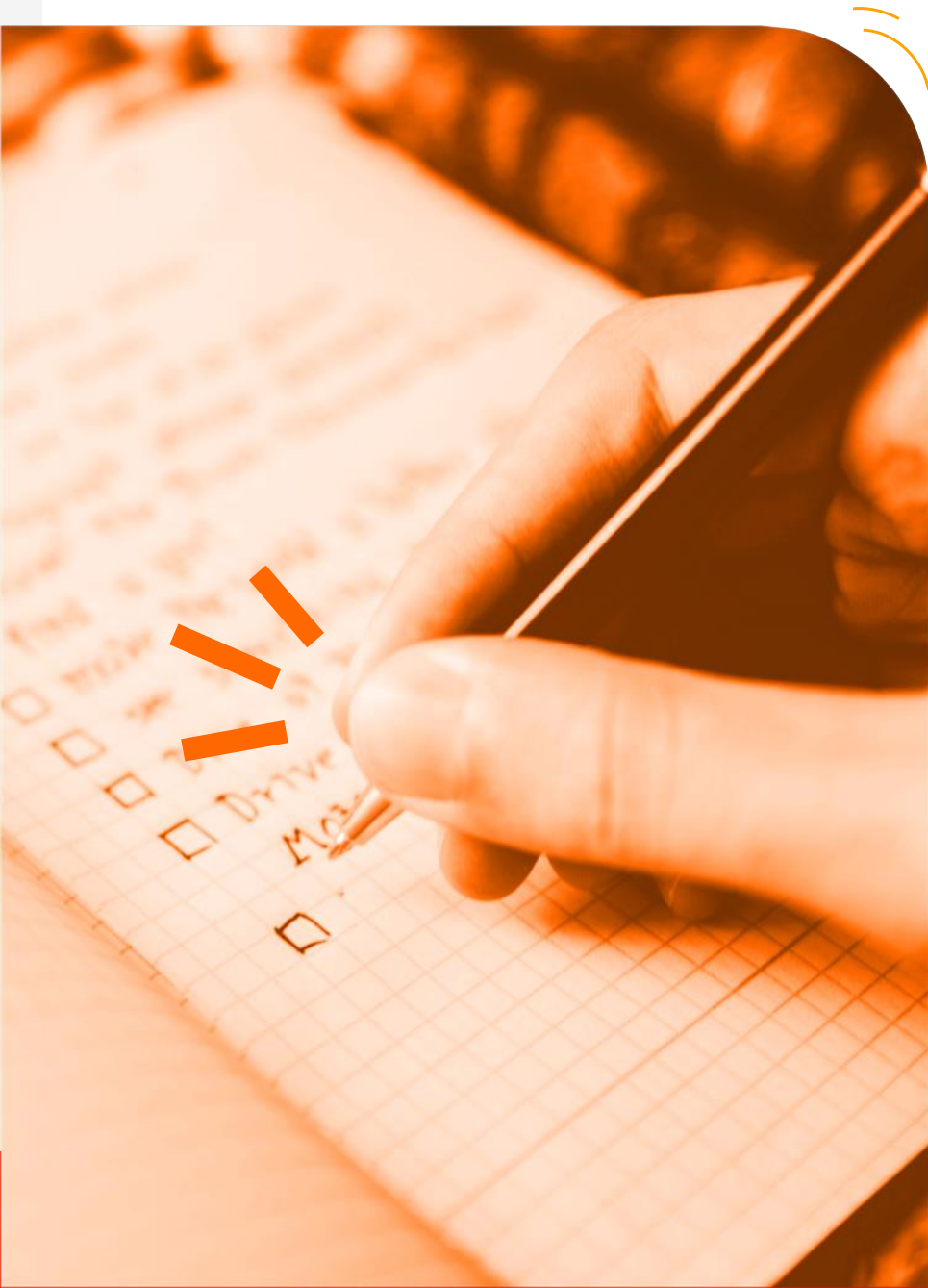
Animal-free attitude index



Considering both a high definitely propensity index and a high animal-free attitude index, the share of respondents who are **CONVINCED** about buying clothing items and accessories made of **ALTERNATIVE MATERIALS** is the following:





Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)




06 **SAMPLE**

Sample | Countries

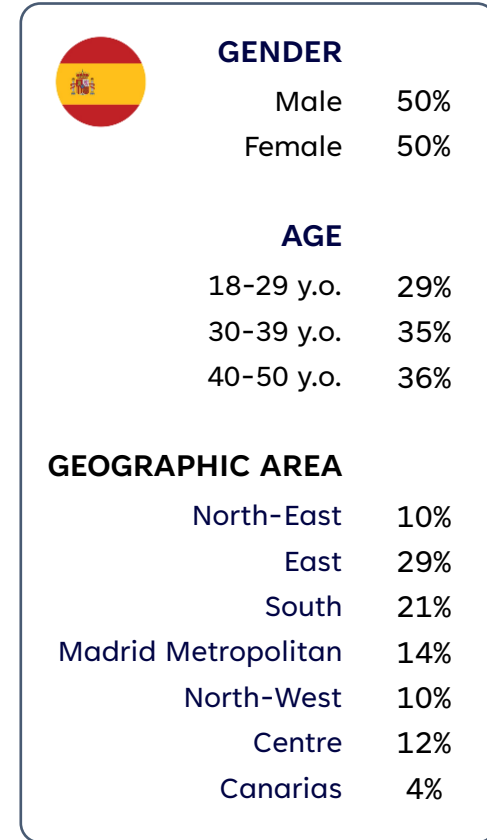
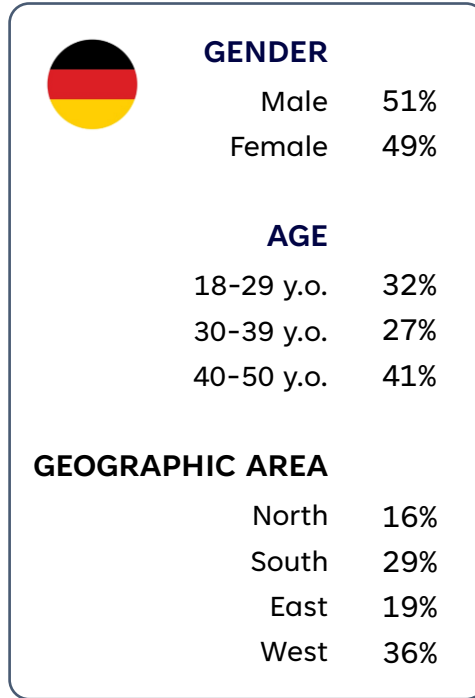
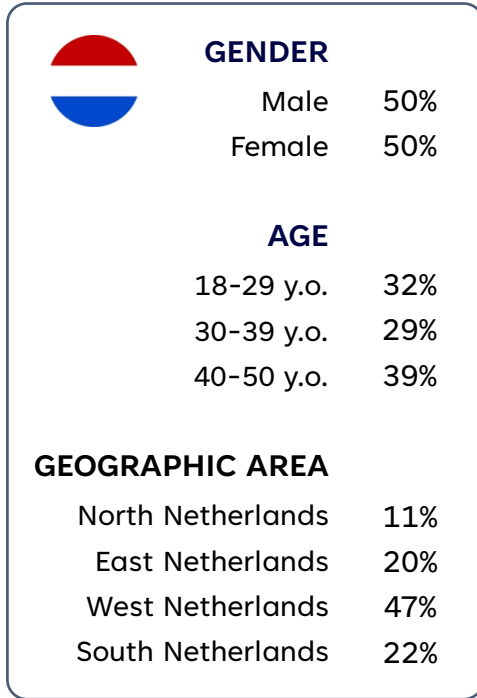
	GENDER	
	Male	49%
	Female	51%
	AGE	
	18-29 y.o.	30%
	30-39 y.o.	32%
	40-50 y.o.	38%
	GEOGRAPHIC AREA	
	North-west	27%
	Nord-east	20%
	Center	20%
	South and Islands	33%

	GENDER	
	Male	49%
	Female	51%
	AGE	
	18-29 y.o.	34%
	30-39 y.o.	30%
	40-50 y.o.	36%
	GEOGRAPHIC AREA	
	Île De France	18%
	Bassin Parisien	17%
	Nord - Pas-De-Calais	6%
	Est (Fr)	8%
	Ouest (Fr)	13%
	Sud-Ouest (Fr)	11%
	Centre-Est (Fr)	12%
	Méditerranée	13%
	Départements D'Outre-Mer (Fr)	2%

	GENDER	
	Male	50%
	Female	50%
	AGE	
	18-29 y.o.	35%
	30-39 y.o.	30%
	40-50 y.o.	35%
	GEOGRAPHIC AREA	
	North East	6%
	North West	10%
	Yorkshire And The Humber	10%
	East Midlands	9%
	West Midlands	9%
	East Of England	8%
	London	11%
	South East	14%
	South West	8%
	Wales	5%
	Scotland	8%
	Northern Ireland	2%

Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)

Sample | Countries



Base: total cases in Italy (608) – France (605) – UK (609) – Netherlands (602) – Germany (605) – Spain (603)



07 SUMMARY

The awareness of the existence of alternative materials

The awareness of the existence of alternative materials for clothing, fashion accessories and shoes is high in all the European countries involved in the survey, but with significant differences among the various materials and countries.

More in detail, leather (from 52% in France to 72% in the UK) and fur (from 51% in Spain to 69% in the UK) are more well known. They are followed by wool (38% in France and 65% in the UK) and feathers/down (30% in France and 57% in the UK).

Less known, however, is the existence of alternative materials to silk, known only by less than 4 out of 10 interviewees in all countries, with the exception of the UK which shows a greater level of knowledge for all materials (almost half of the UK sample - 47% - are informed about the existence of alternative materials for all 5 materials considered during the interview).

The countries with a lower level of information on the topic are Spain and Italy, where respectively 1/3 and 1/4 of the sample know no more than one alternative material.

The propensity to purchase alternative materials

The interviewees were then shown a detailed description of the advantages linked to the use of alternative materials and asked to express their propensity to purchase using a 4-level scale.

Considering only the first level of the scale ("certainly inclined to purchase garments made with alternative materials, rather than natural ones") for all the categories of clothing and accessories proposed, almost 1/3 of the interviewees declared themselves CERTAINLY inclined without reservations in France (31%) and Italy (30%), around 1/4 in Germany (25%), Spain (24%) and the UK (23%), less than 1/5 in the Netherlands (18%).

The attitude towards «animal free» clothing and fashion accessories

The interviewees were then shown statements on possible attitudes and behaviors when purchasing "animal free" clothing and fashion accessories and were asked to express the degree of agreement/disagreement using a 4-level scale.

Considering the sum of the two positive responses ("strongly agree" + "somewhat agree") for all the proposed statements, Italy is the country with the most favorable attitude towards "animal free" fashion with a share of 37%, followed by Germany (33%), France (31%) and Spain (30%).

The share found in the UK was slightly more limited (28%) and really lower in the Netherlands (28%), where a less favorable attitude towards ethical («Rather than buying an item of clothing with quality materials animal origin, change shop or brand») and trend aspects ("Buying fashion products made with alternative materials makes me happy and proud of myself and my choices") seems to have had a particular impact.

PERCHÈ SCEGLIERE BVA DOXA

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E velocità di esecuzione / **Consulenza focalizzata** sul business e il settore / **Internazionalità** e capacità globali

PASSIONE NEL NOSTRO LAVORO

Per maggiori informazioni:

paolo.colombo@bva-doxa.com



www.bva-doxa.com