



Global @dvisor

Ethical Clothing

Citizens in 16 Countries Assess the Ethics of Clothing Production Abroad for a Total Global Perspective



SURVEY METHOD

- The survey instrument is conducted monthly in 16 countries around the world via the Ipsos Online Panel system.

COUNTRIES

- The countries reporting herein are Argentina, Australia, Belgium, Canada, France, Germany, Britain, Hungary, Italy, Japan, Norway, Poland, South Korea, Spain, Sweden and the United States of America.

SAMPLE

- For the results of the survey presented herein, an international sample of 12,484 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Hungary, Norway, Poland, South Korea and Sweden, where each have a sample approximately 500+.

WEIGHTING

- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. The precision of Ipsos online polls are calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points and one of 500 is accurate to +/- 5.0 percentage points in their respective general populations. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error. For more information on credibility intervals, please visit the Ipsos website.

HI1. As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements (Agree very much, Somewhat agree, Somewhat disagree, Very much disagree): *randomize*

I actually really don't care or feel any responsibility about where clothing is made or how it is made or what the working conditions are for the production of that clothing in the world because it's not up to me to do anything about it – I just want choice and low cost. [*anchored first*]

I currently boycott certain brands of clothing because of how they treat their workers

I'm willing to pay an extra couple of dollars for each piece of clothing so that it improves the conditions of where workers are creating them

I'm confident that if I spent an extra couple of dollars for each piece of clothing you I buy so that it improves the conditions of where workers are creating them what that it will actually be used for that purpose by the company who employs them
I believe that when a building collapses and kills and injures many workers, it should be the local authorities and builder of the building tour held primarily and mostly responsible and not the company that contract the clothing to be made in that place and may be in another part of the world

I believe that companies that contract their clothing to be manufactured in another part of the world cannot be expected to be held responsible for things being done somewhere else unless they actually owned and operated themselves

HI2. Do you believe that the conditions for workers – such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work—who make clothing in [insert country] in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are (Very much, Somewhat, Not very much, Not at all): *randomize*

Good

Safe

Exploitive

Regulated properly

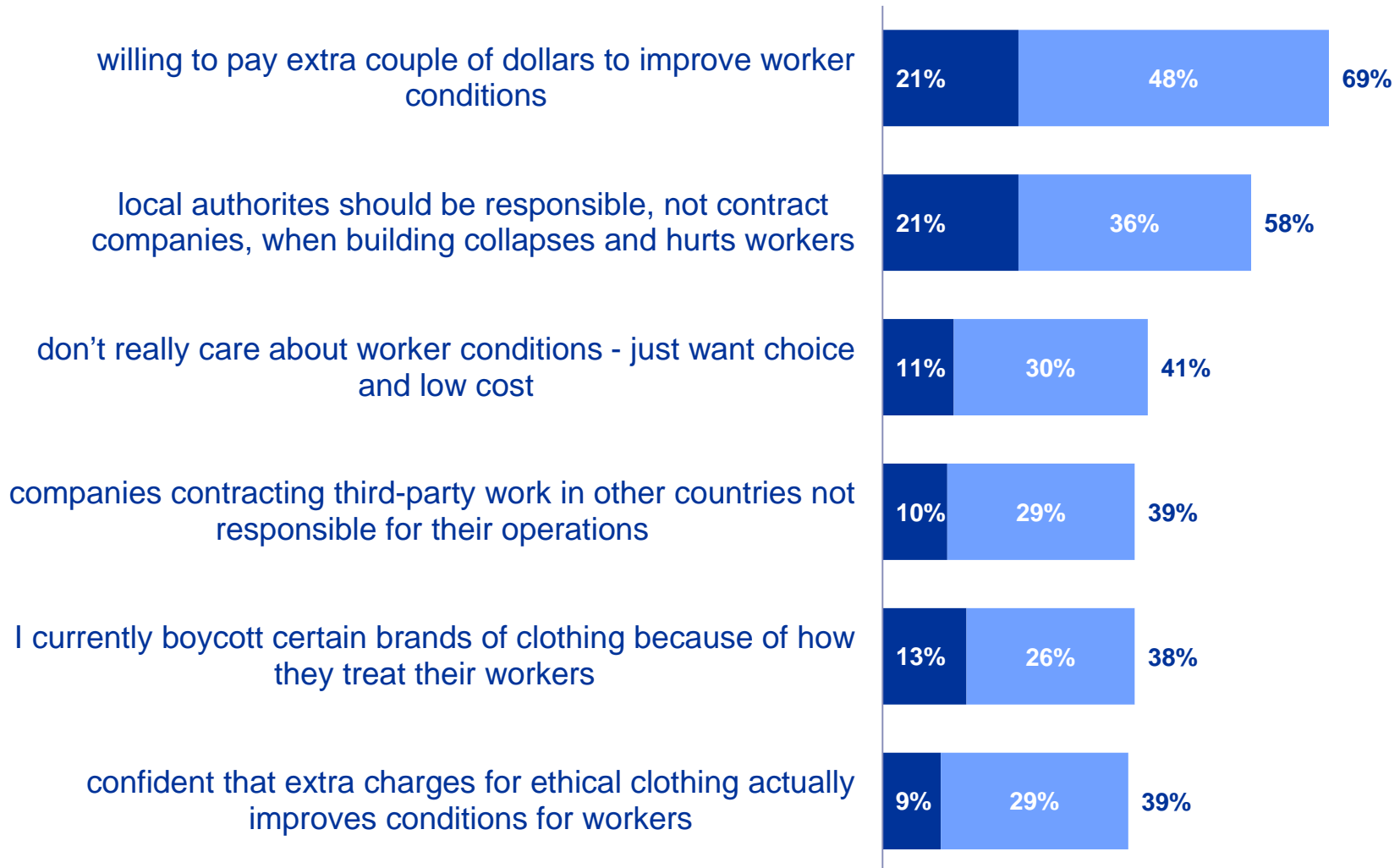
Taking advantage of workers

Paying workers the right amount for what they do

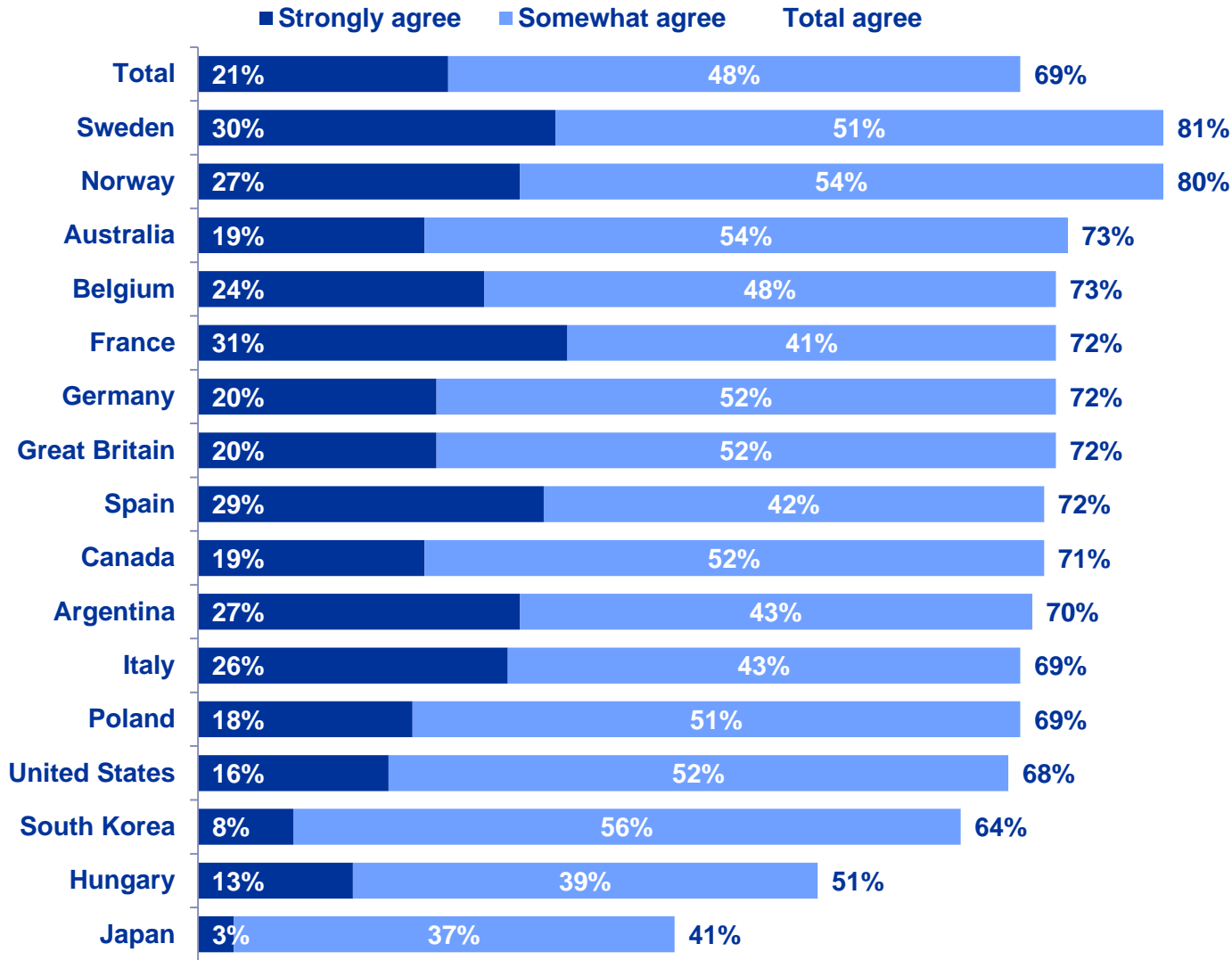
Cared for by the companies that sell their finished products

Global Summary Slide

(paraphrased summaries)

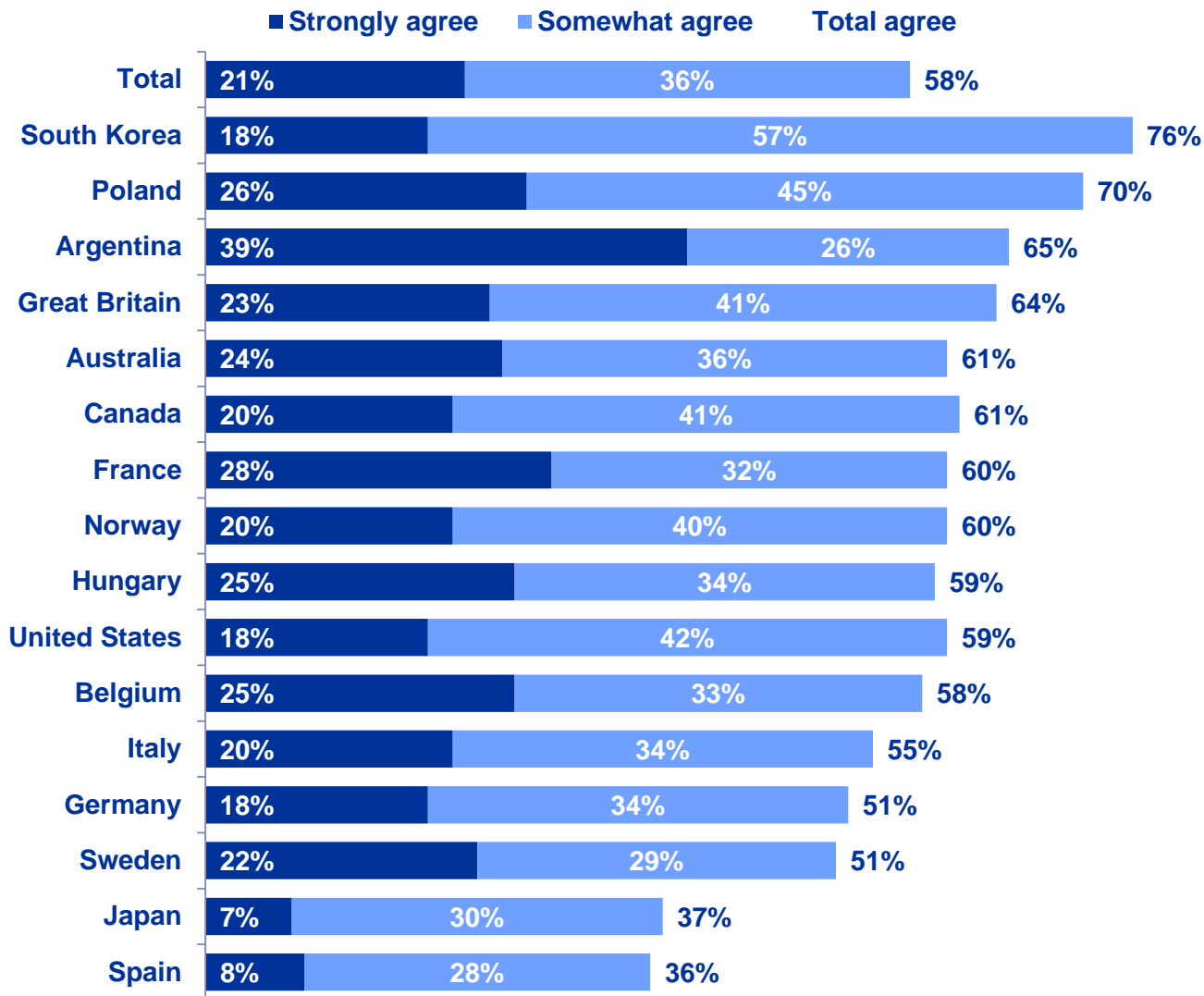


I'm willing to pay an extra couple of dollars for each piece of clothing so that it improves the conditions of where workers are creating them



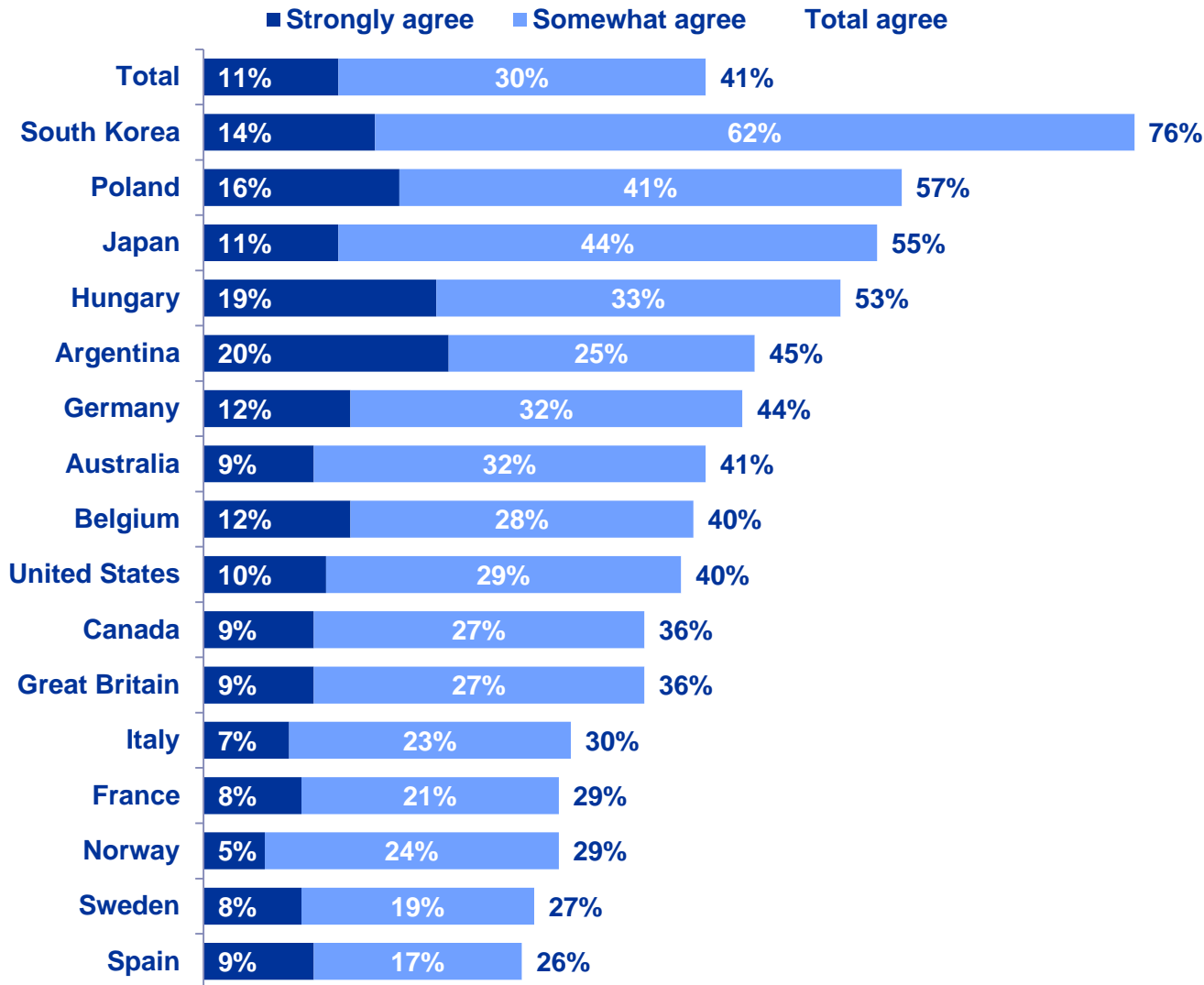
HI1.3. [I'm willing to pay an extra couple of dollars for each piece of clothing so that it improves the conditions of where workers are creating them] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

I believe that when a building collapses and kills and injures many workers, it should be the local authorities and builder of the building tour held primarily and mostly responsible and not the company that contract the clothing to be made in that place and may be in another part of the world



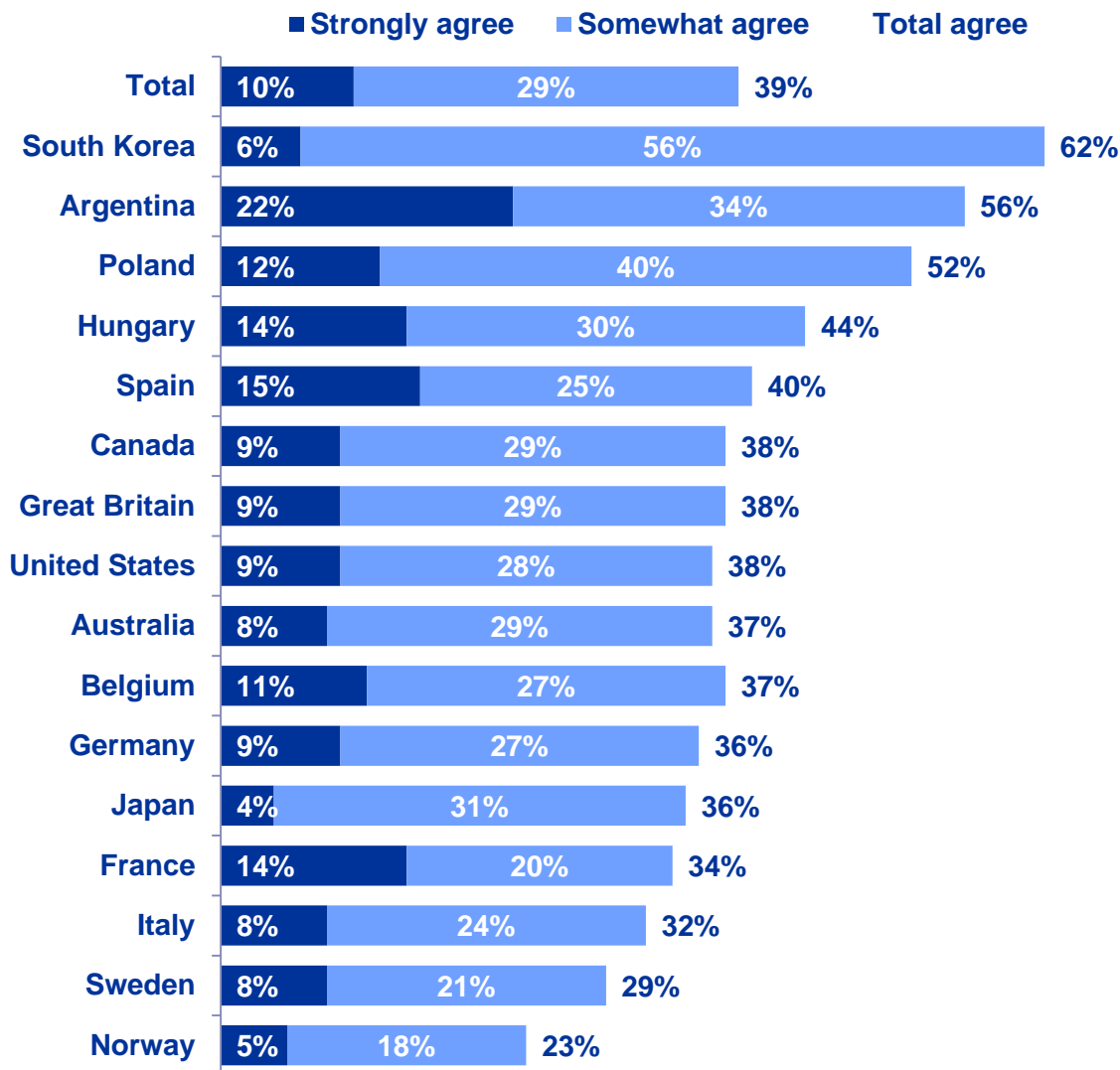
HI1.5. [I believe that when a building collapses and kills and injures many workers, it should be the local authorities and builder of the building tour held primarily and mostly responsible and not the company that contract the clothing to be made in that place and may be in another part of the world] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

I actually really don't care or feel any responsibility about where clothing is made or how it is made or what the working conditions are for the production of that clothing in the world because it's not up to me to do anything about it – I just want choice and low cost.



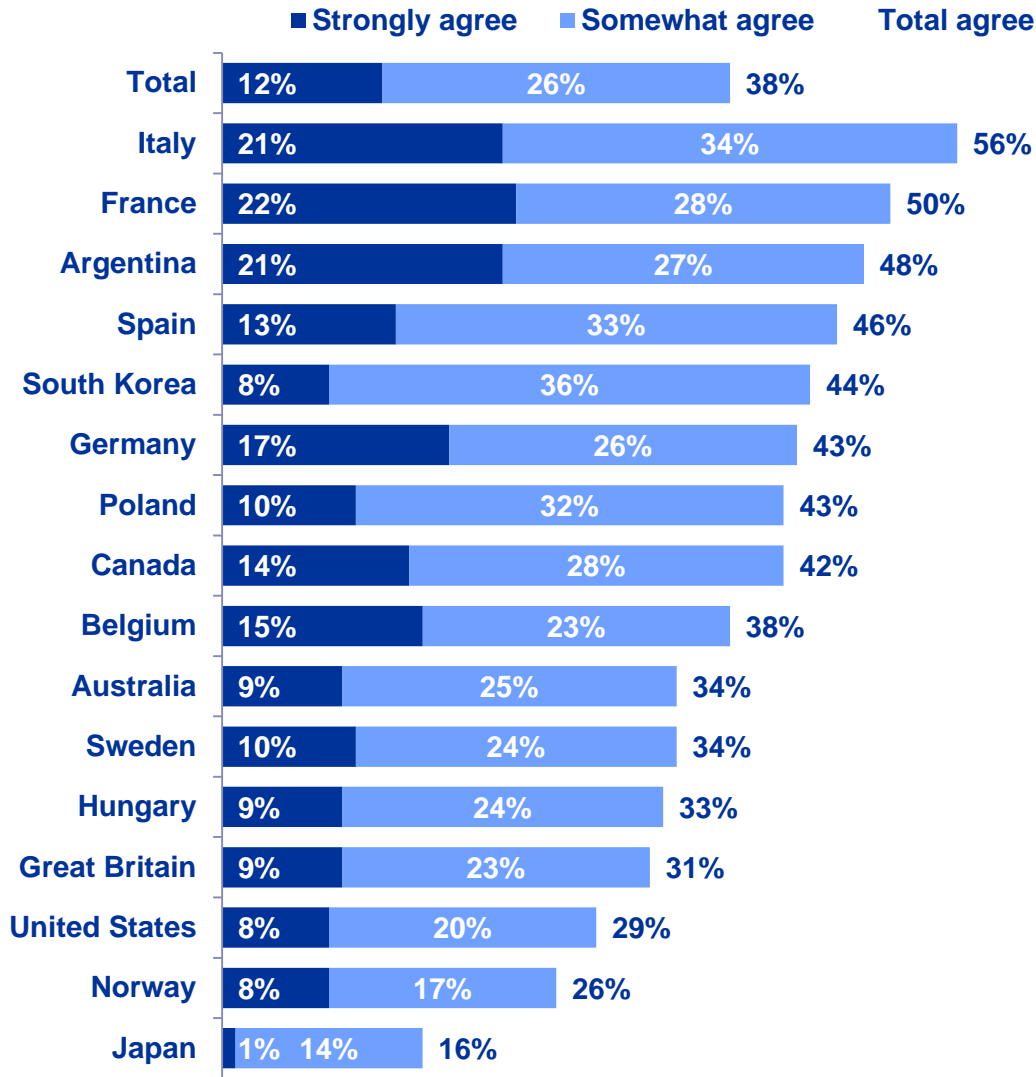
HI1.1. [I actually really don't care or feel any responsibility about where clothing is made or how it is made or what the working conditions are for the production of that clothing in the world because it's not up to me to do anything about it – I just want choice and low cost.] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

I believe that companies that contract their clothing to be manufactured in another part of the world cannot be expected to be held responsible for things being done somewhere else unless they actually owned and operated themselves



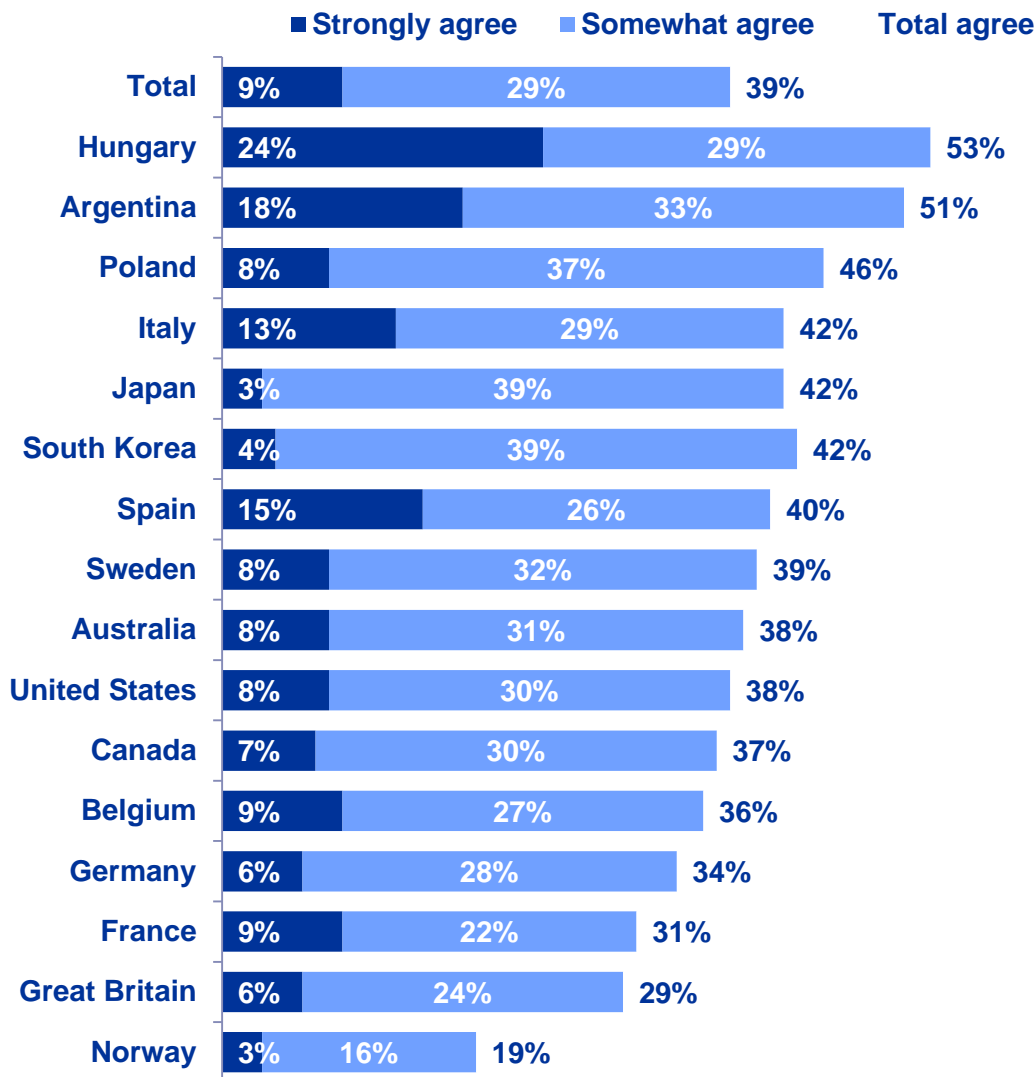
HI1.6. [I believe that companies that contract their clothing to be manufactured in another part of the world cannot be expected to be held responsible for things being done somewhere else unless they actually owned and operated themselves] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

I currently boycott certain brands of clothing because of how they treat their workers



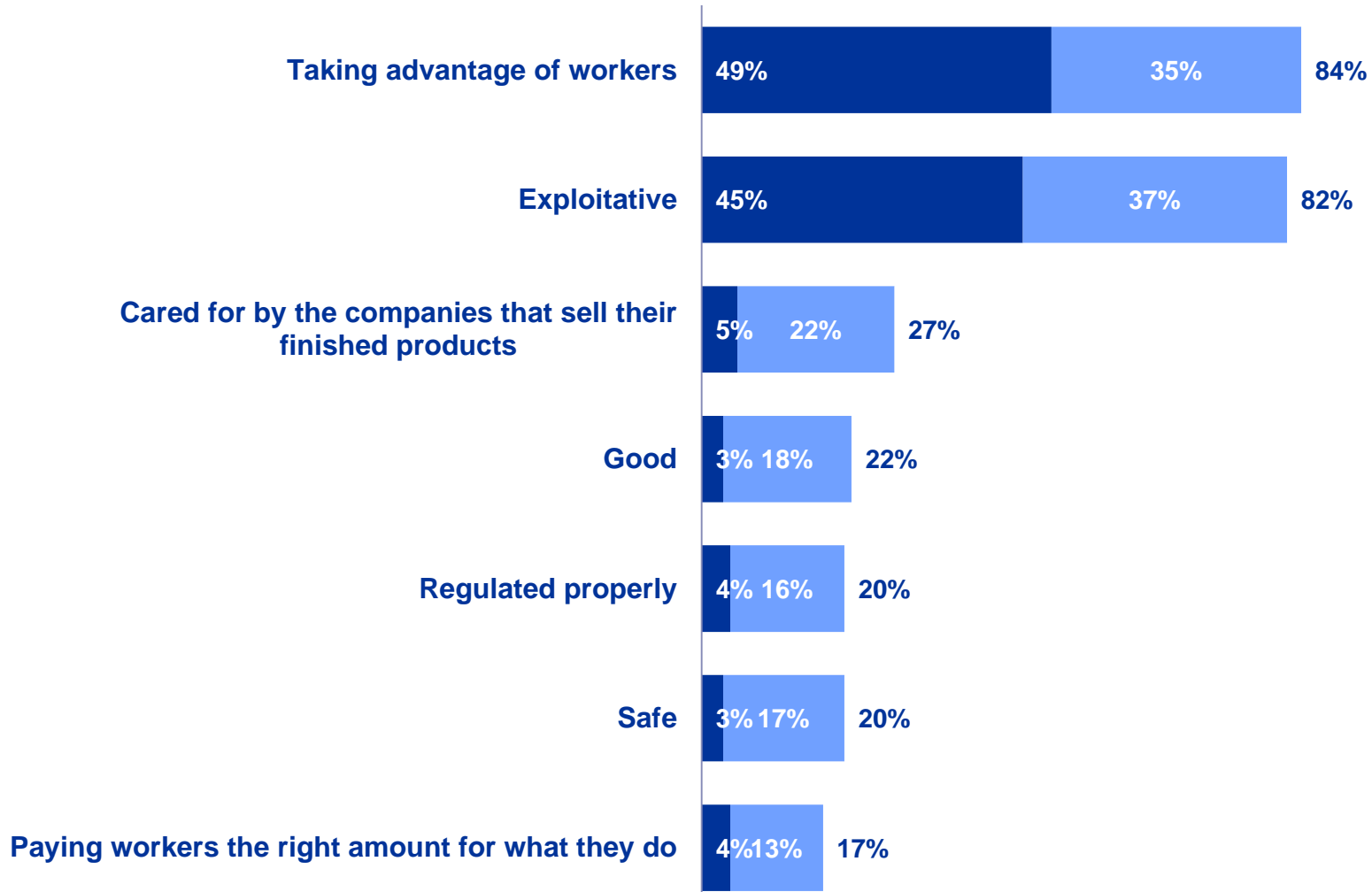
HI1.2. [I currently boycott certain brands of clothing because of how they treat their workers] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

I'm confident that if I spent an extra couple of dollars for each piece of clothing I buy so that it improves the conditions of where workers are creating them that it will actually be used for that purpose by the company who employs them



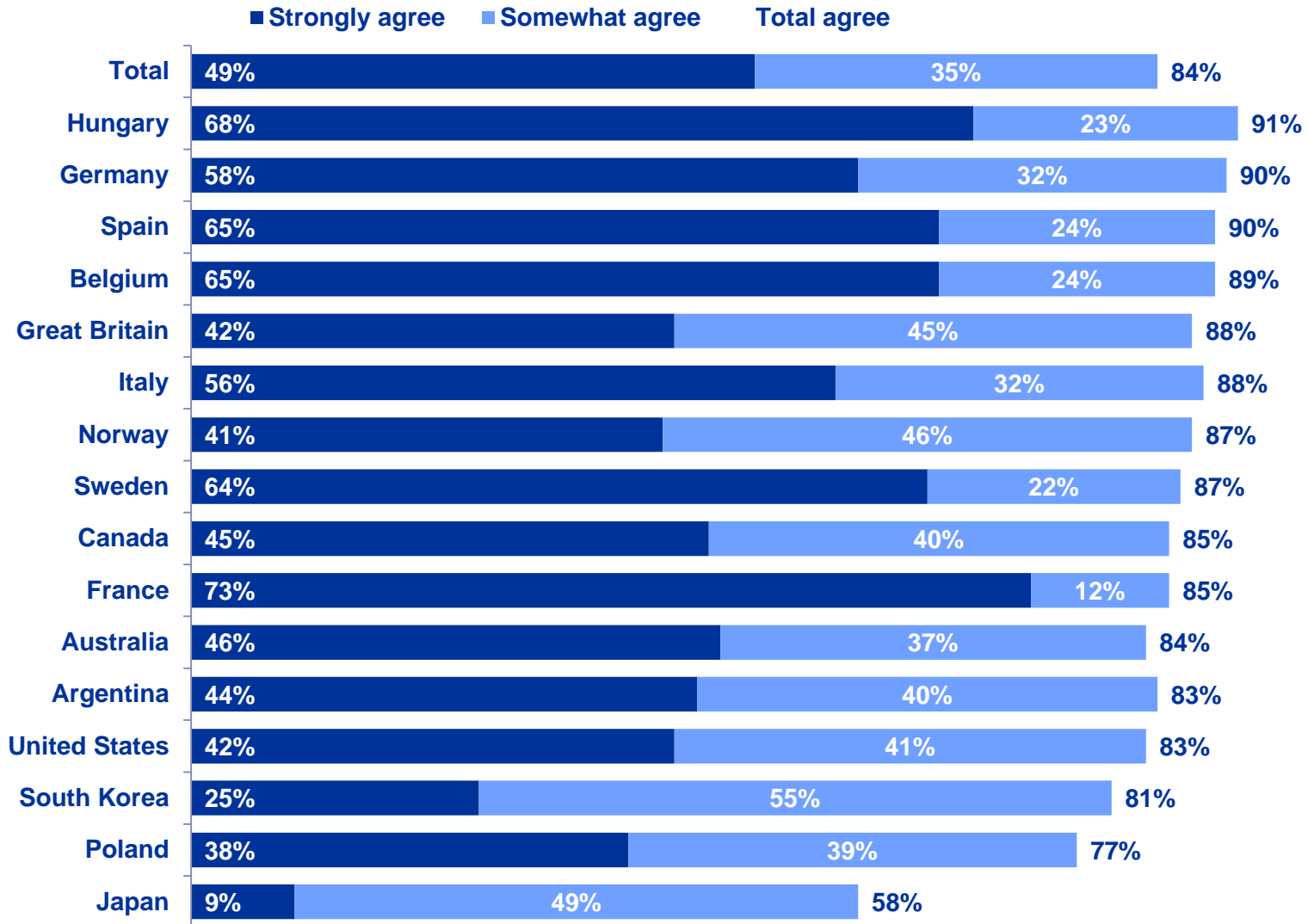
HI1.4. [I'm confident that if I spent an extra couple of dollars for each piece of clothing I buy so that it improves the conditions of where workers are creating them that it will actually be used for that purpose by the company who employs them] As a consumer of clothing that might be made in another part of the world please indicate if you agree or disagree with the following statements:

Global Summary Slide



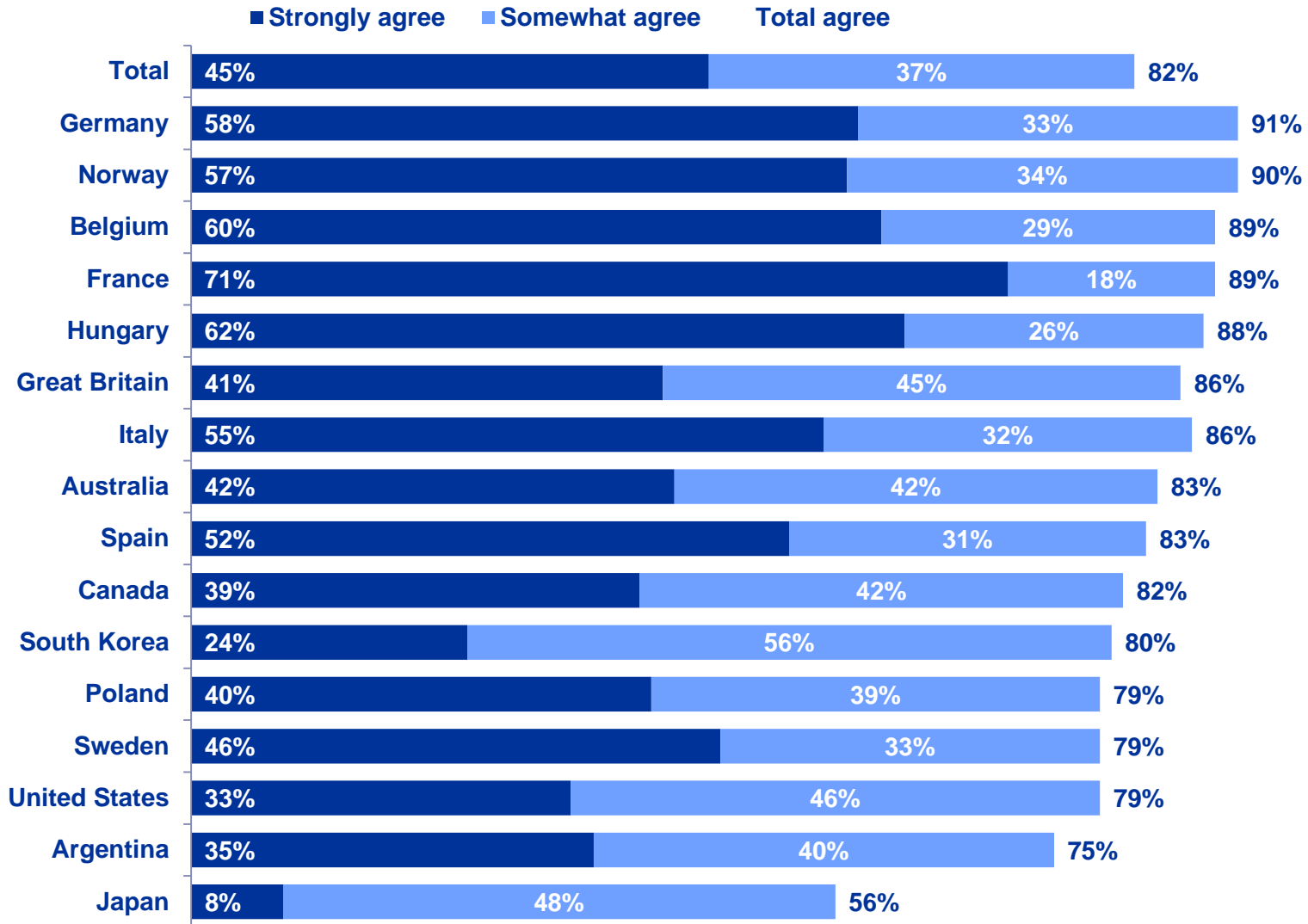
HI2. Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Taking advantage of workers



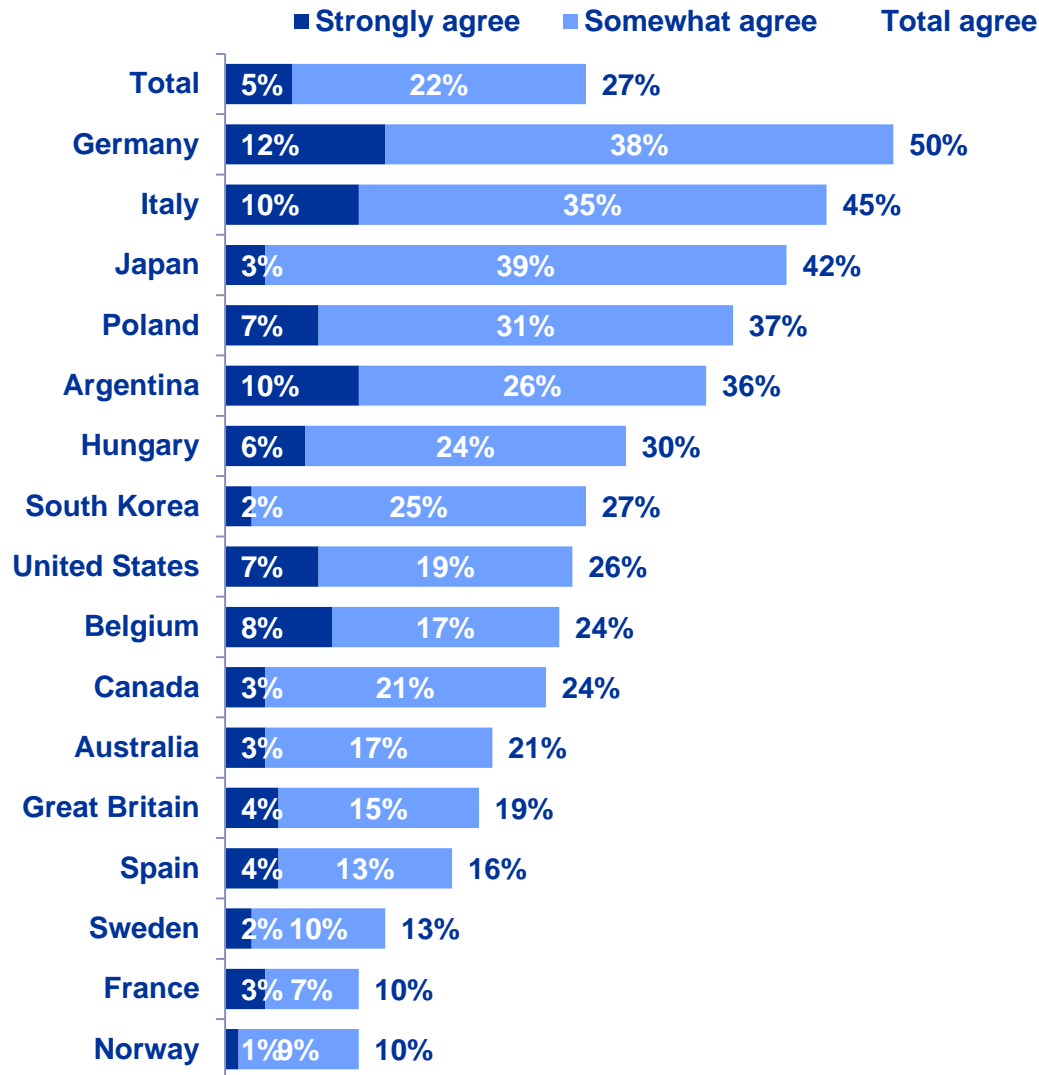
HI2.5. [Taking advantage of workers] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Exploitative



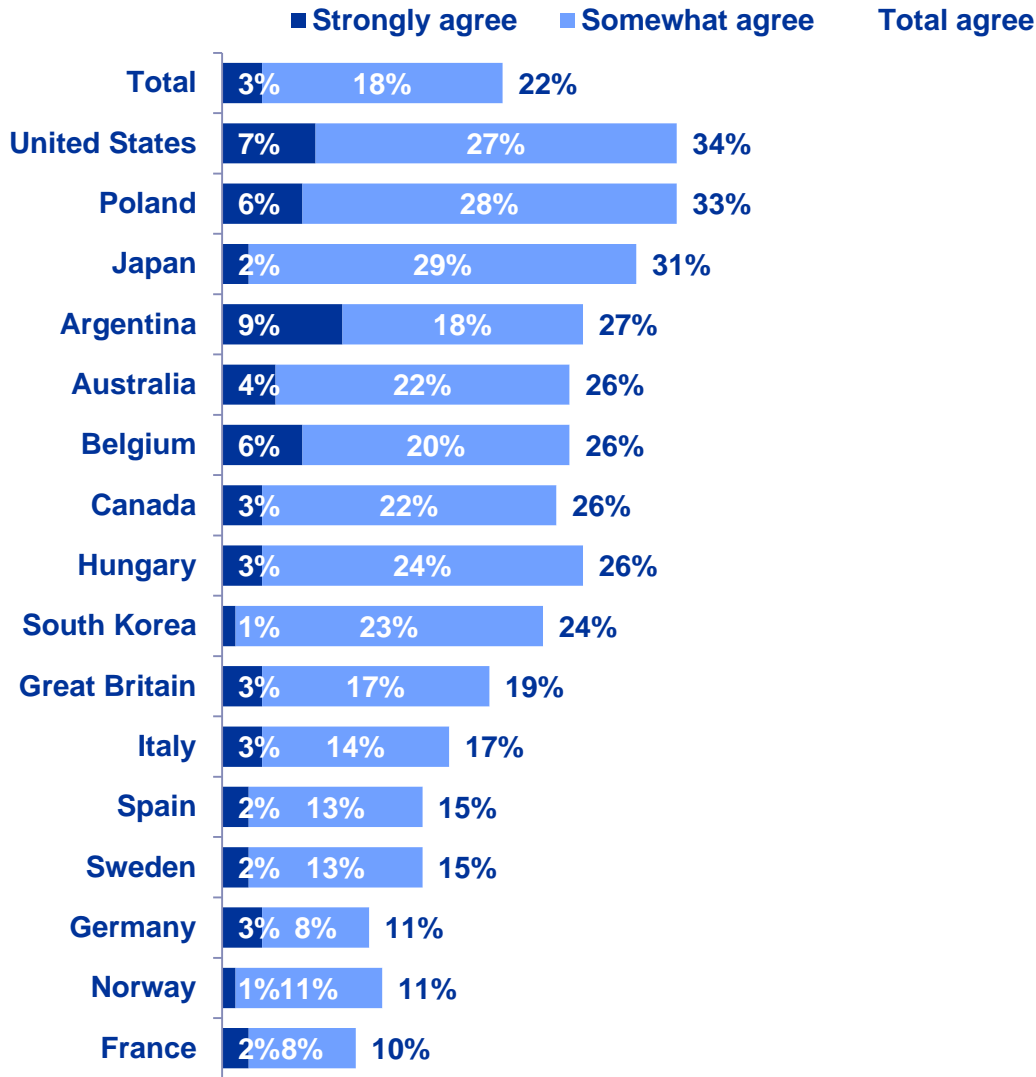
HI2.3. [Exploitive] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Cared for by the companies that sell their finished products



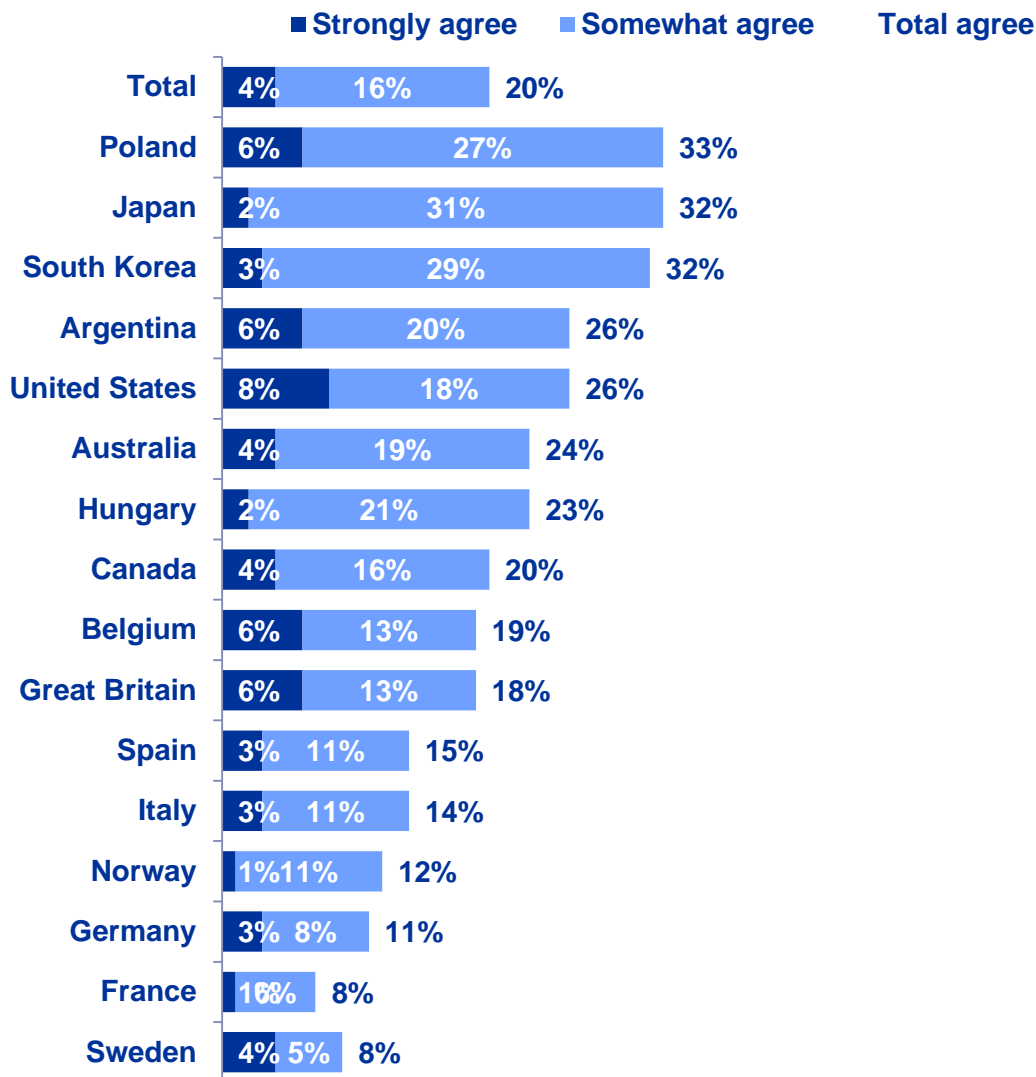
HI2.7. [Cared for by the companies that sell their finished products] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Good

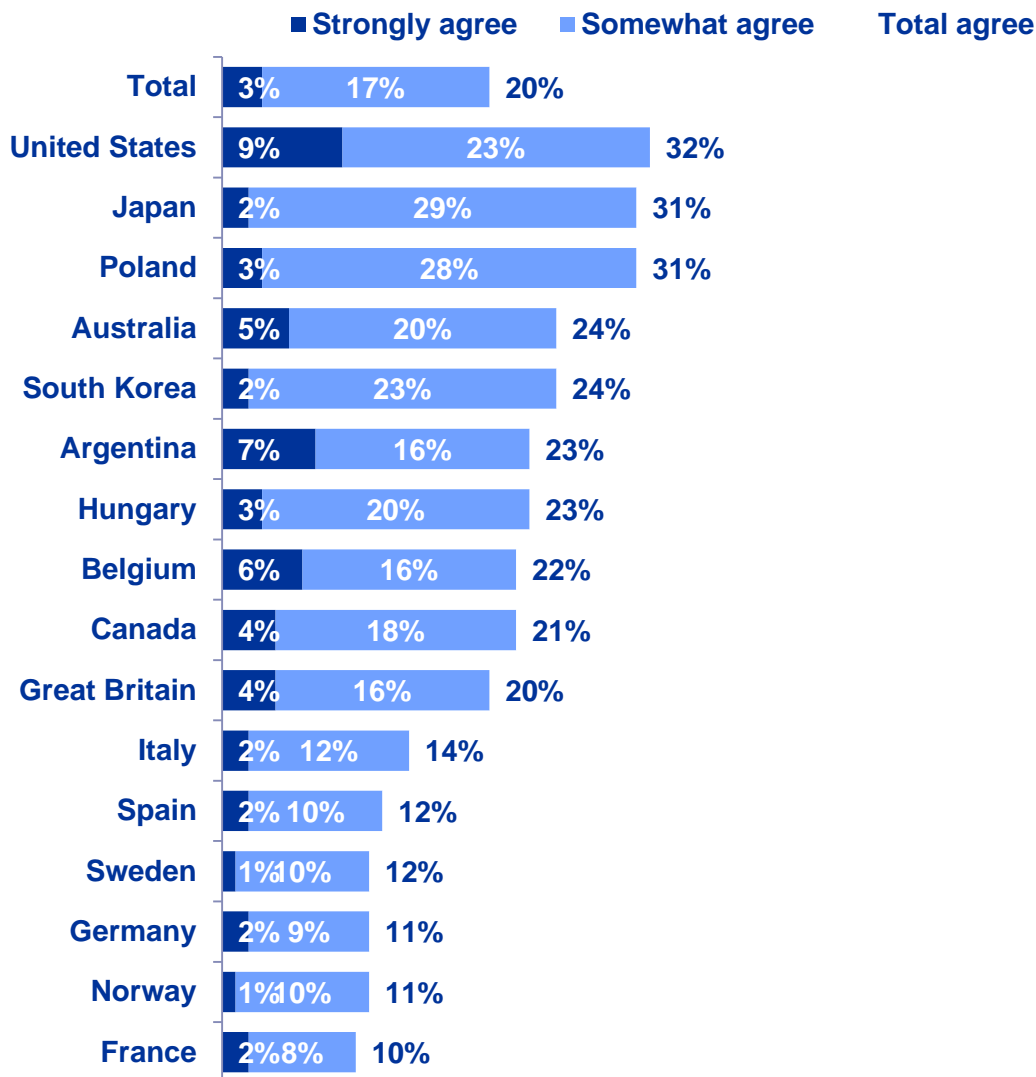


HI2.1. [Good] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Regulated properly

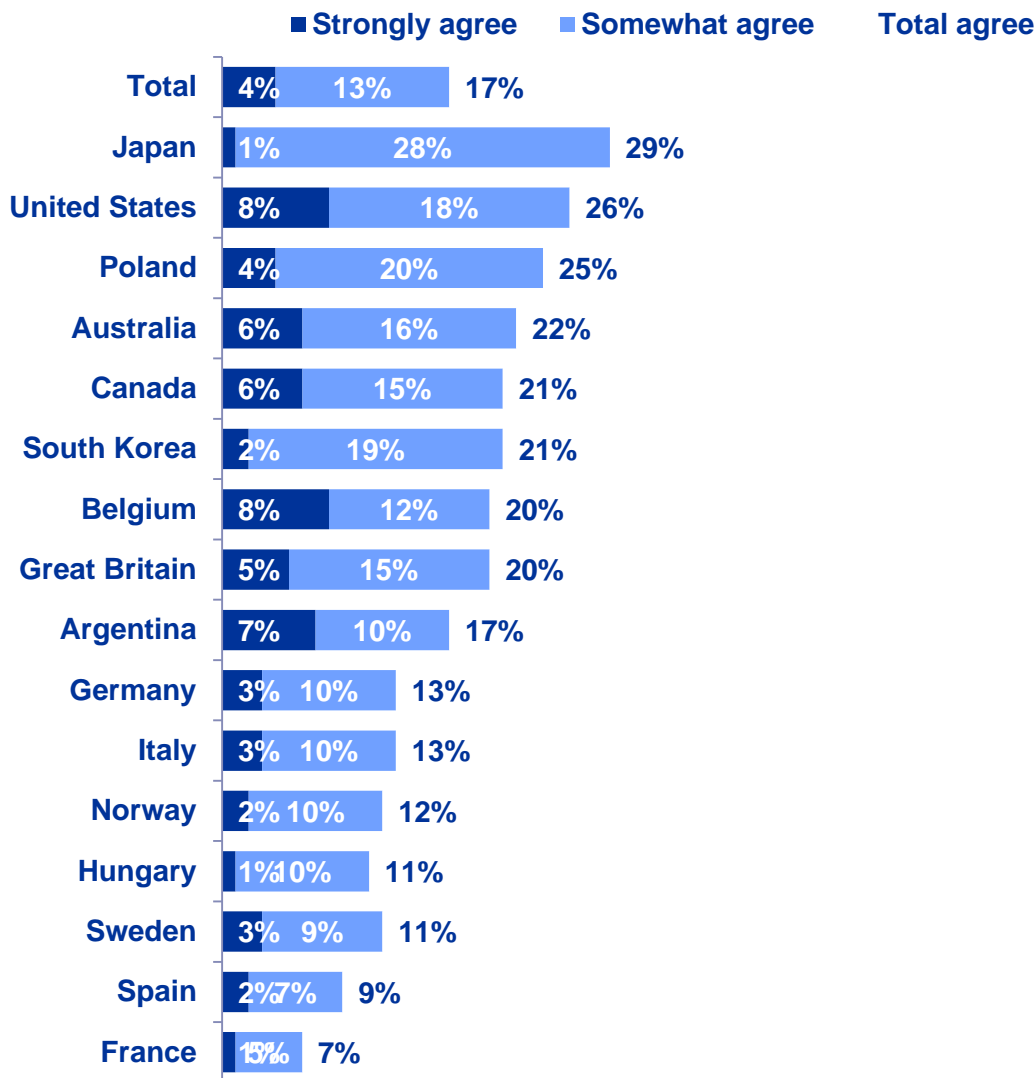


HI2.4. [Regulated properly] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:



HI2.2. [Safe] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:

Paying workers the right amount for what they do



HI2.6. [Paying workers the right amount for what they do] Do you believe that the conditions for workers - such as the wages that they are paid and the actual buildings, rooms and equipment they use when at work - who make clothing in less developed countries like Bangladesh, India and those in the far East, and then shipped to other parts of the world for sale by retailers and increased cost to their consumers are:



About Ipsos

- Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company.
- With offices in 84 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.
- Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.
- Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,363 billion (1.897 billion USD) in 2011.
- Visit www.ipsos-na.com to learn more about Ipsos' offerings and capabilities.



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- The Ipsos *Global @dvisor* Syndicate Study is a monthly, online survey of consumer citizens in 24 countries and produces syndicated reports and studies specifically tailored to the needs of corporations, advertising and PR agencies, and governments. For information contact:

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