GLOBAL WITH US:
RETAIL & CONSUMER UPDATE

CCI & Cotton Incorporated's Global Lifestyle Monitor Survey

COTTON USA™
THE COTTON THE WORLD TRUSTS

GLOBAL METHODOLOGY SUMMARY

NATIONAL ONLINE SURVEY CONDUCTED IN EACH OF THE FOLLOWING MARKETS

Country	Sample Size	Field Date
United States	n=1000	4/03/23 – 4/14/23
Italy	n=1004	4/06/23 – 4/14/23
Mexico	n=1000	4/06/23 – 4/14/23
UK	n=1004	4/06/23 – 4/14/23
Colombia	n=1024	4/06/23 – 4/17/23
Germany	n=1009	4/06/23 – 4/17/23
India	n=1006	4/06/23 – 4/17/23
China	n=1005	4/06/23 – 4/25/23
Indonesia	n=1002	4/11/23 – 4/24/23
Turkey	n=1008	4/11/23 – 4/24/23
Japan	n=1002	4/11/23 – 4/25/23
Vietnam	n=1005	4/11/23 – 4/25/23
Thailand	n=1001	4/11/23 – 4/28/23

Respondent Requirements

- Decision-maker own clothing purchases
- Between ages of 16 and 55 years old

OVERALL SUMMARY

Overall Summary

Global consumers are most interested in comfort, quality, and value, which is apparent in their priorities when shopping for clothing. Perceptions of Cotton align strongly with what is important to consumers, which is why it is the most preferred fiber.

However, economic concerns influence shopping habits, and many say they will buy less clothing or buy second hand in the coming year. Of the clothing they are considering, they look for apparel that delivers value by being longer lasting and that is suitable for many occasions, whether at the office, at home, or going out. Cotton hits the mark on the most important fabric features, and highlighting factors like temperature control, durability enhancement, and resistance to damage over time will continue to drive the fabric's appeal and willingness to pay more by supporting claims of comfort, quality, and durability.

However, despite the appeal of cotton, and its positive perceptions, only about half of consumers view Cotton as environmentally safe, and many are unclear on the safety of other fibers. Coupled with growing consumer concern for the environment and sustainable practices, the importance of education can not be overlooked. CCI must continually reinforce that cotton is a more environmentally-friendly fiber that does not require sacrifice in terms of comfort, quality and softness (sustainability certificates are the most trusted cue for safety).

Global consumers are doing more online shopping than ever before. However, in store shopping is still strong, particularly at Department stores. Younger shoppers use both online and in store more often than older shoppers, emphasizing the need for retailers to have a strong omnichannel strategy.

KEY FINDINGS & RECOMMENDATIONS

Consumer Macro Trends

- The profile of clothing consumers represent a wide variety of people, the majority between the ages of 25-44.
- Households are composed of 4 people, often a spouse, children under 18, and/or parents.
- Majority of global consumers are employed full time, often in white collar or executive/ professional positions, with many in the office full time and some working from home or hybrid.
- Many consumers feel optimistic about their personal financial situation, and this is even higher among younger people.
- However, inflation/the economy is a top concern, as is the environment.

Recommendations

- Continue to monitor consumers' employment and work settings as that has impacted clothing and amplified their desire for comfort.
- Many retain the need for office-appropriate clothing and wear a mix of dress pants, casual slacks, or denim to work. CCI should encourage retailers to use cotton or blends in more work appropriate clothing styles to better deliver comfort to clothing that is commonly less comfortable.
- Despite consumers' optimism about their personal finances, there are looming concerns about the economy and inflation which could influence shopping habits. Retailers should pay close attention to their customer base when considering any price adjustments or changes to their offerings.

KEY FINDINGS & RECOMMENDATIONS

Apparel Shopping Habits (I)

Global consumers purchase more clothing online now than the past several years.

However, many say they will buy second hand, buy less, or not buy clothing at all in the next year, in order to save money.

Nearly all consumers will prioritize comfortable clothing, good value, and high-quality clothing in the next year.

Clothes are by far the favorite item to shop for among all consumers, a trend particularly strong among women and those under age 35.

Recommendations

- Retailers need to have a strong omnichannel strategy to capture the growing online market while not neglecting the core base of consumers that still like to shop in store. Offering a seamless and effortless customer experience across channels will grow both streams of business.
- Given the need for value and longer-lasting items, messaging about cotton's long-life span would address consumer's desire to save money amidst concerns about inflation and the economy.
- Women and younger consumers are more engaged in clothes shopping overall. Retailers' and brands' marketing efforts should prioritize these captive audiences to more efficiently manage marketing budgets.

KEY FINDINGS & RECOMMENDATIONS

Apparel Shopping Habits (2)

Clothing shopping occurs at least every couple months for both online and in-store. It's slightly less frequent among those >35.

Many consumers shop at online-only stores for clothes, followed by department stores and a variety of other in-store channels.

Online shopping is preferred when it comes to browsing and repeat purchases, while in-store is desired when they want to see, feel, and try on the clothing.

At each stage of the shopping journey, those <35 have stronger preference for online shopping compared to those >35.

Recommendations

- Although there is a shift towards online shopping, in-person shopping remains highly relevant due to the greater sensory experience of seeing, touching and trying on clothes in person. Thus, efforts should be placed towards initial trial/first-time buys in-store and repeat purchases online.
- This leads to an opportunity for retailers to cross-sell between online and in person channels to reach each consumer at the right location at each point in the path to purchase.
- Retailers who have developed strong shopping modalities (curbside pickup, in-store pickup, delivery, or instore shopping) should be viewed as examples of best practices for identifying strategic initiatives when wanting to elevate the omnichannel experience.

KEY FINDINGS & RECOMMENDATIONS

Apparel Shopping Habits (3)

The most important features for clothing purchases are comfort, quality, fit, and durability, across ages and genders. Brand, care instructions, and country of origin are least important to global shoppers.

Consumers are willing to pay more for benefits that support those most important features: temperature control, durability enhancement, and quality measures like resistance to odors, fading, stains, and wrinkles.

The top sources of inspiration for clothing ideas are media (from a retailer, social media, magazines/TV/movies) and store displays. Catalogs and flyers are less inspiring, suggesting that print is not the best method for connecting with consumers.

Top social media source is Instagram, followed by Facebook and YouTube.

Recommendations

- Emphasizing comfort and quality is key to growing consideration and purchase intent as they are by far the most important considerations for global consumers when shopping for clothes.
- Rather than rely on brand names, which are less important to shoppers, retailers should highlight key reasons to believe in important features, such as temperature control for comfort, durability enhancement for value, and resistance to declining quality cues such as odors, fades, stains, and wrinkles.
- Because consumers predominately turn to social media for clothing inspiration, it is critical for retailers and brands to have a strong online presence and clear voice in their messaging and imagery.
- Printed advertising has lower appeal and smaller reach than years ago. If converted to greater spend and focus on online efforts, this shift could be promoted as an environmentally conscious initiative.

KEY FINDINGS & RECOMMENDATIONS

The Consumer Wardrobe

Global consumers own many pieces of casual clothing such as underwear and t-shirts, and a good number of other clothing like dresses and casual shirts.

Consumers, especially women, are versatile with their bottom wear. Women wear a mix of denim, dresses/skirts, and other types of bottoms depending on the occasion, while men prefer denim for most occasions. Across genders, dress pants slacks are more common for work while shorts and knitwear are best for home.

However, despite the variety of items, denim is still worn about 3-4 days per week because many simply enjoy wearing it.

Recommendations

- Comfort is a strong driver of clothing purchases for both men and women and messaging should focus on this feature, regardless of the type of clothing item.
- Comfort will likely continue to be of great importance to shoppers as many work environments have become hybrid and less formal, requiring less need for formal business attire. Retailers and brands that understand this shift will do well as shoppers are looking for clothing items that can fit both an office and home setting as well as other occasions.
- While denim is an appealing fabric, it is more versatile for men who use it for a greater variety of occasions. Continued promotion of denim's combination of style and comfort could further enhance its perceived value and use for additional occasions where women want to look and feel their best.
- Though denim is not the preferred bottom wear for women for many occasions, the use of cotton fibers can be incorporated into dresses and skirts to expand the interest and use of Cotton.

KEY FINDINGS & RECOMMENDATIONS

Cotton: the Natural Choice

Cotton clothing is viewed more positively than other fabrics and is most associated with comfort, softness, quality, authenticity, and sustainability.

However, only about half say they would pay more for natural fibers due to perceived comfort and quality.

The most preferred material is cotton, followed by denim and cotton blends. Cotton/cotton blends are the most preferred natural materials for all types of clothing, particularly t-shirts, underwear, pajamas, and socks, where softness is key.

Many consumers look at fabric labels when shopping.

Recommendations

Cotton is viewed very positively among global consumers, although there is still room to improve willingness-to-pay for that preference. Highlight the features that signal durability, versatility, and longer-term value, since it is not as much of a strength compared to other fabric types. This will be critical given economic concerns for global consumers.

Also continue to highlight the most important perceived strengths such as comfort, quality, and softness in a way that is relevant for clothes worn at home, at work, or for going out.

KEY FINDINGS & RECOMMENDATIONS

Sustainability & The Environment

Majority of consumers understand that environmental concerns are real and require change, and those concerns have grown for many consumers over the past year.

However, sustainable clothing is a nice to have for most global consumers and still not as important as other factors like quality, price, fit, and comfort. Only a quarter will only purchase sustainable clothing, although more younger consumers buy it exclusively.

Cotton is viewed as environmentally safe, more so than other fabrics, where there is more uncertainty (even for Hemp and Wool).

Over half of consumers trust sustainability messaging on clothing, particularly when there is a sustainability certification that states whether the apparel was made in an environmentally-friendly manner.

Recommendations

- Though shoppers have strong and growing environmental concerns, many do not understand the connection between the clothing they purchase and its impact on the environment. Education efforts should focus on helping shoppers identify sustainable items and brands (based on fibers and manufacturing practices).
- Despite viewing cotton as safe, global consumers lack clarity on the safety of other fibers. Stronger emphasis on the differences between natural and synthetic fibers may give cotton a stronger competitive edge.
- Targeted efforts should utilize platforms that consumers use most (retailer's social media and other media outlets) and showcase sustainability certificates that can build trust and help consumers identify environmentally friendly apparel.
- Retailers and brands could also reimagine the thrifting mentality by exploring adoption of more sustainable practices that also bring shoppers to their stores. For example, coupons for donating clothes that can be reused in the production process can attract shoppers to the store, supply some of the production materials, and help the environment. This addresses consumers' desire for both value and sustainability.

CONSUMER MACRO TRENDS

Demographics of survey respondents represent a wide variety of people.

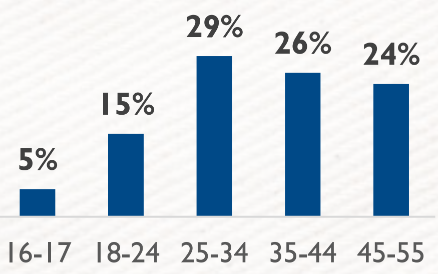
DEMOGRAPHIC PROFILE

Gender

49% Men

51% Women

Age



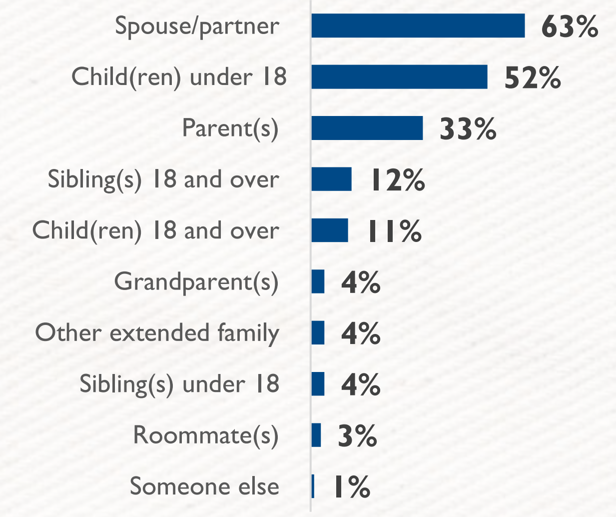
Number of People in HH

9% One

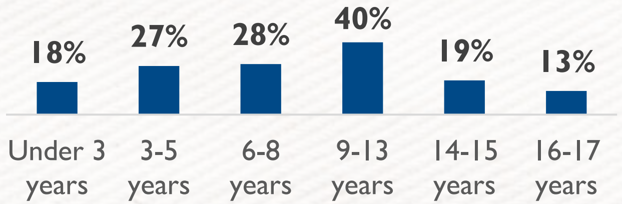
91% Two+

3.5 Mean

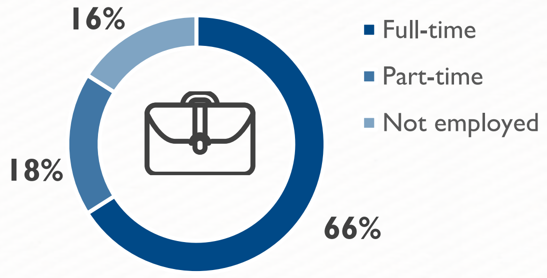
HH Composition



Children in HH – Based to HH with kids



Employment Status



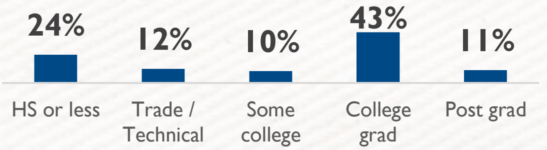
Occupation – Based to employed

Executive/Professional	39%
White Collar	23%
Employed/Full time/Part time employee (unsp)	13%
Service workers, Protective workers	11%

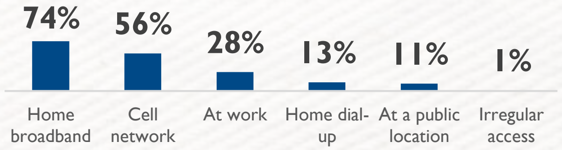
Work Setting

In an office	31%	In a retail location	8%
Work from home	11%	In an institutional setting	5%
Hybrid of in office and work from home	11%	In a health care facility	5%
Factory, warehouse, or construction	8%	On a farm or ranch	1%

Education

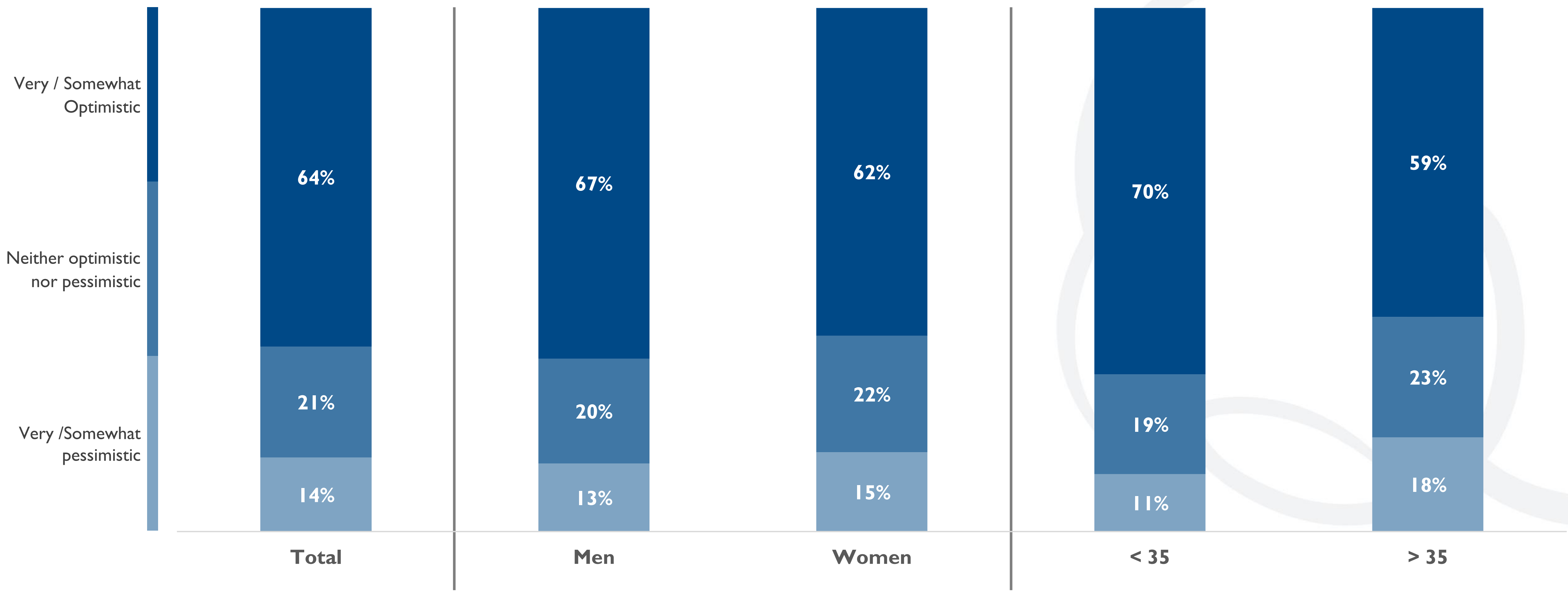


Internet Access



Many feel optimistic about their personal finances, particularly those under age 35.

OUTLOOK TOWARDS PERSONAL FINANCIAL SITUATION



Base: Total (n=13070) / D1: Describe your outlook for your own personal financial situation. Would you say you feel…?

Still, the top concerns for global consumers are inflation/the economy and climate change/the environment.

TOP CONCERNS CURRENTLY

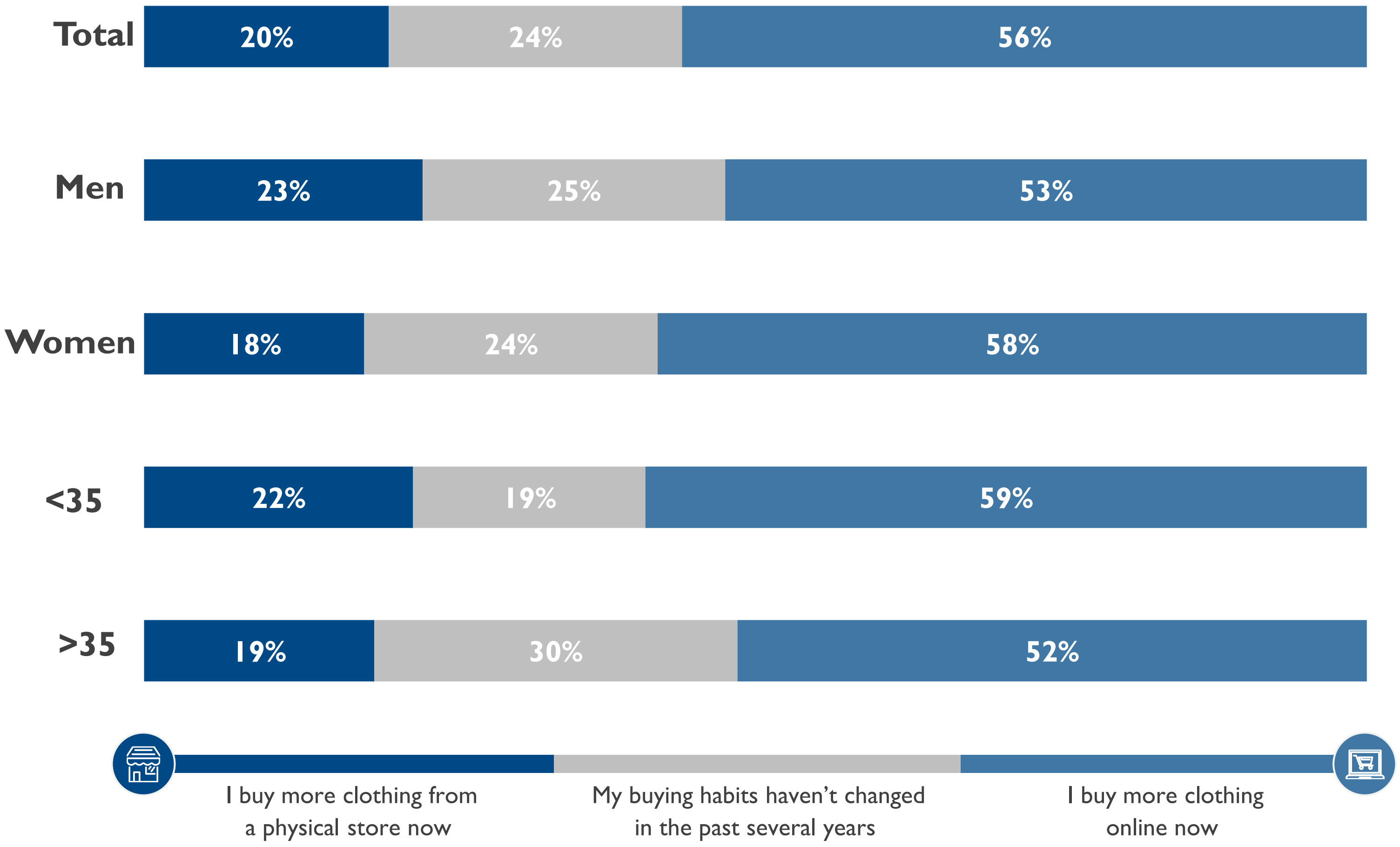
Concern	Total	Men	Women	< 35	> 35
Inflation/ The economy	45%	47%	44%	42%	49%
Climate change/ The environment	34%	34%	35%	33%	36%
My physical and/or mental health	31%	28%	34%	31%	30%
My personal finances	31%	28%	33%	29%	32%
Crime/ Public safety	25%	25%	24%	24%	25%

Base: Total (n=13070) / D9: What are your top 3 concerns currently?

APPAREL SHOPPING HABITS

Consumers buy more clothing through online channels than they have in the past, especially women and younger consumers.

CHANGES IN METHOD OF CLOTHES BUYING



Reason Buy More Clothing…

Online

"First of all for practicality: I can view the entire catalog of a company in just a few minutes and check for certain sizes. Then for the speed with which I can make purchases."

"Convenience, many styles, delivery to your door."

Physical Store

"So I can feel it and try it on."

"Because I can try on the clothes and see how they fit me or if I like how it looks on my body."

Base: Total (n=13070) / Q2: How has the way you buy clothing changed, if at all, in the past several years?
Q3: Why do you buy more clothing [insert response]?

Consumers plan to prioritize comfort, value, and quality when shopping for clothes in the next year.

SHOPPING IN THE NEXT YEAR

■ Yes ■ No

	Total	Men	Women	< 35	> 35
I will buy more comfortable clothing	85%	85%	86%	87%	83%
I will do more research so I can get the best value	81%	81%	81%	82%	80%
I will buy higher-quality, longer-lasting items	78%	80%	76%	80%	75%
I will buy clothing in the latest styles	58%	57%	59%	64%	52%
I will buy some new clothing, but less than usual	49%	47%	51%	49%	49%
I will replace a lot of my wardrobe with new clothing	48%	49%	48%	53%	43%
I will buy clothing in a different size	30%	28%	33%	36%	25%
I will buy some clothing secondhand	24%	20%	28%	27%	21%
I will buy lower-quality discount items	22%	20%	24%	24%	20%
I will not buy any clothing this year	10%	11%	9%	10%	9%

Base: Total (n=13070) / Q4a: Which of the following statements capture how you will shop for clothing in the next year?

Many will buy second hand, buy less, or not buy clothing at all next year in order to save money.

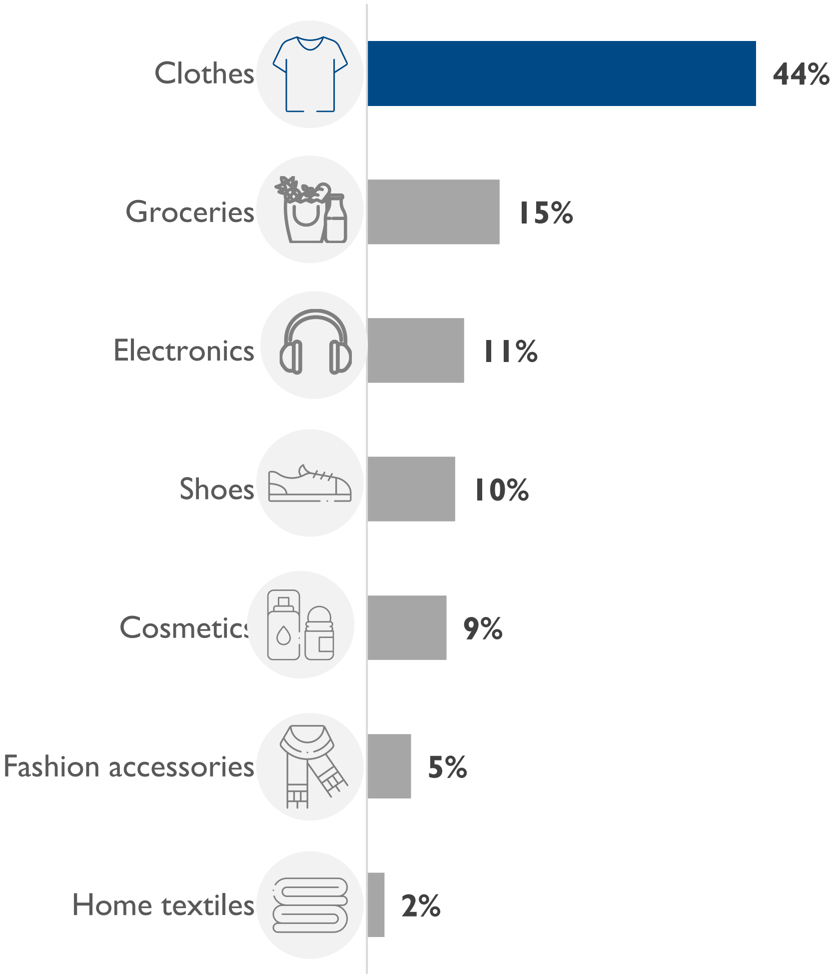
REASONS FOR BUYING SECOND HAND / BUYING LESS / NOT BUYING CLOTHING

	Total	Men	Women	< 35	> 35
% buying second hand, buying less, or not buying clothing	61%	58%	64%	62%	60%
Save money	37%	36%	38%	37%	38%
Have other financial priorities for my money	22%	22%	23%	22%	23%
Already have too much clothing	16%	18%	14%	16%	16%
Reduce my environmental impact	14%	12%	15%	15%	13%
Not interested in current fashion trends	6%	7%	4%	6%	6%
Have less interest in shopping	3%	4%	3%	4%	3%

Base: Total (n=13070) / Q4a: Which of the following statements capture how you will shop for clothing in the next year?
Base: Those who are buying second hand/buying less/not buying clothing (n=7960) / Q4b: What is your top reason for [insert response]?

Nearly half indicate clothes are a favorite item to shop for, which is more often the case for women and those under 35.

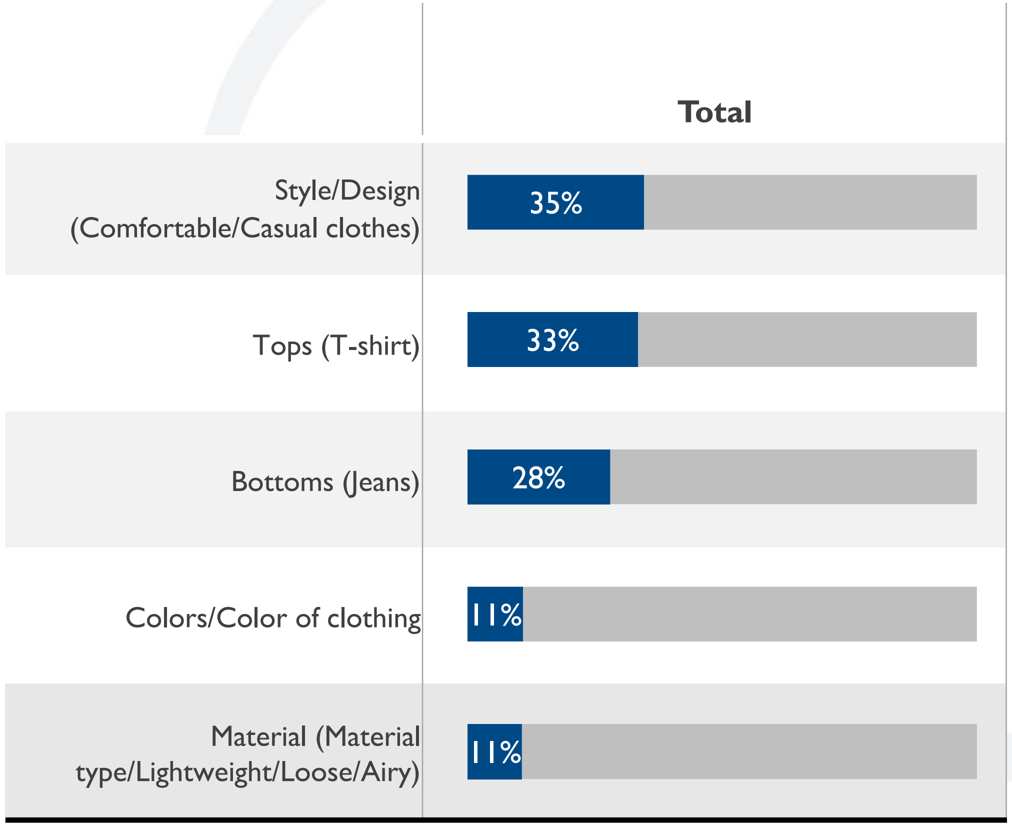
FAVORITE ITEMS TO SHOP FOR



Base: Total (n=13070) / Q7: Which one of the following would you most prefer to go shopping for?

Favorite items of clothing are often described as ‘comfortable’, ‘jeans’, and ‘shirt’.

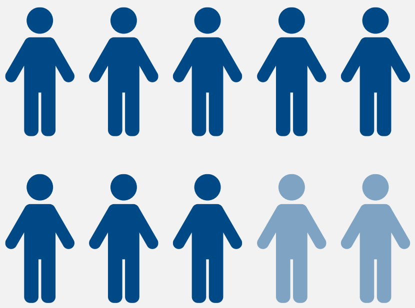
FAVORITE ITEMS OF CLOTHING



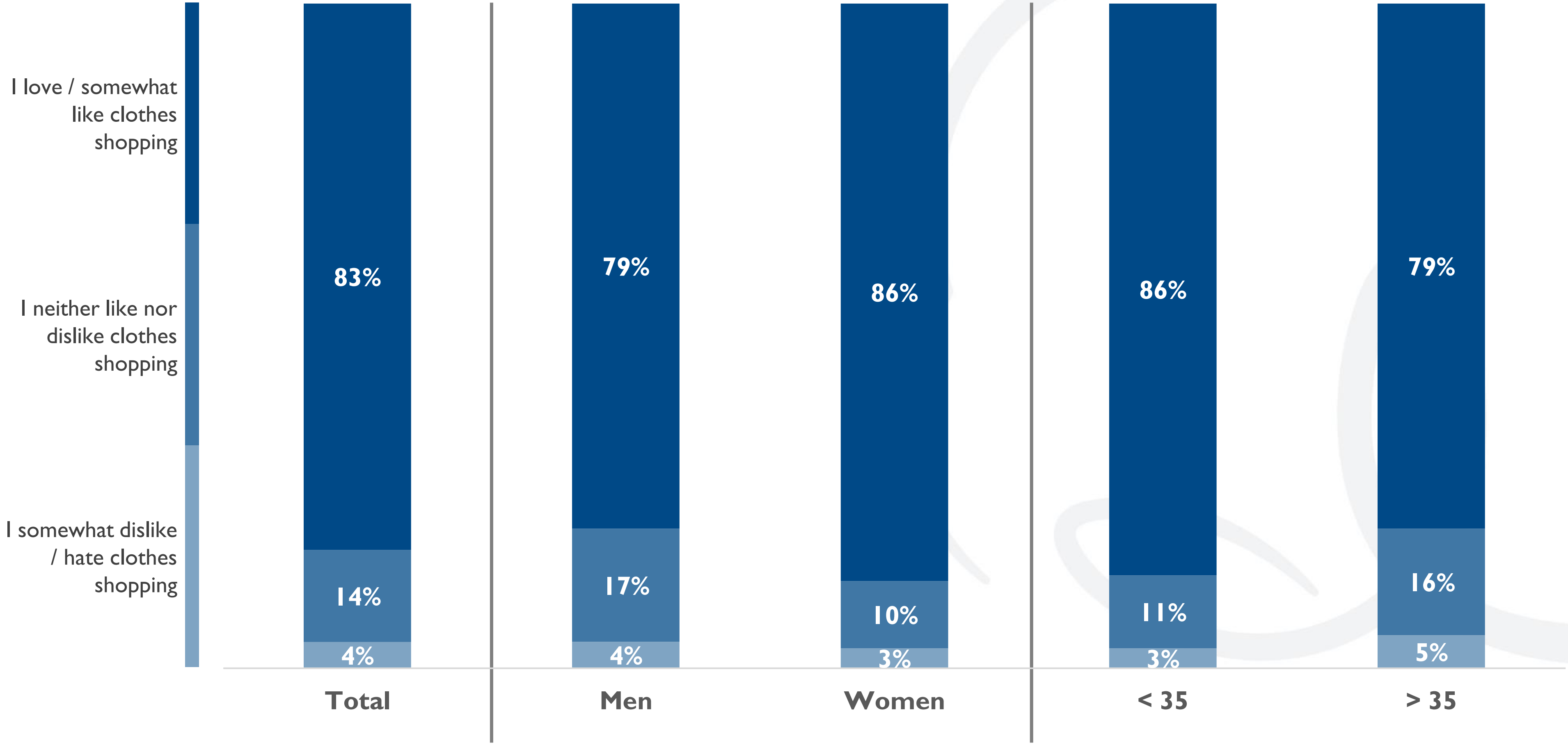
Base: Total (n=13070) / S13: Using just a few sentences, please describe your favorite item of clothing.

Most enjoy clothes shopping, especially women and those under 35.

CLOTHING SHOPPING ENJOYMENT



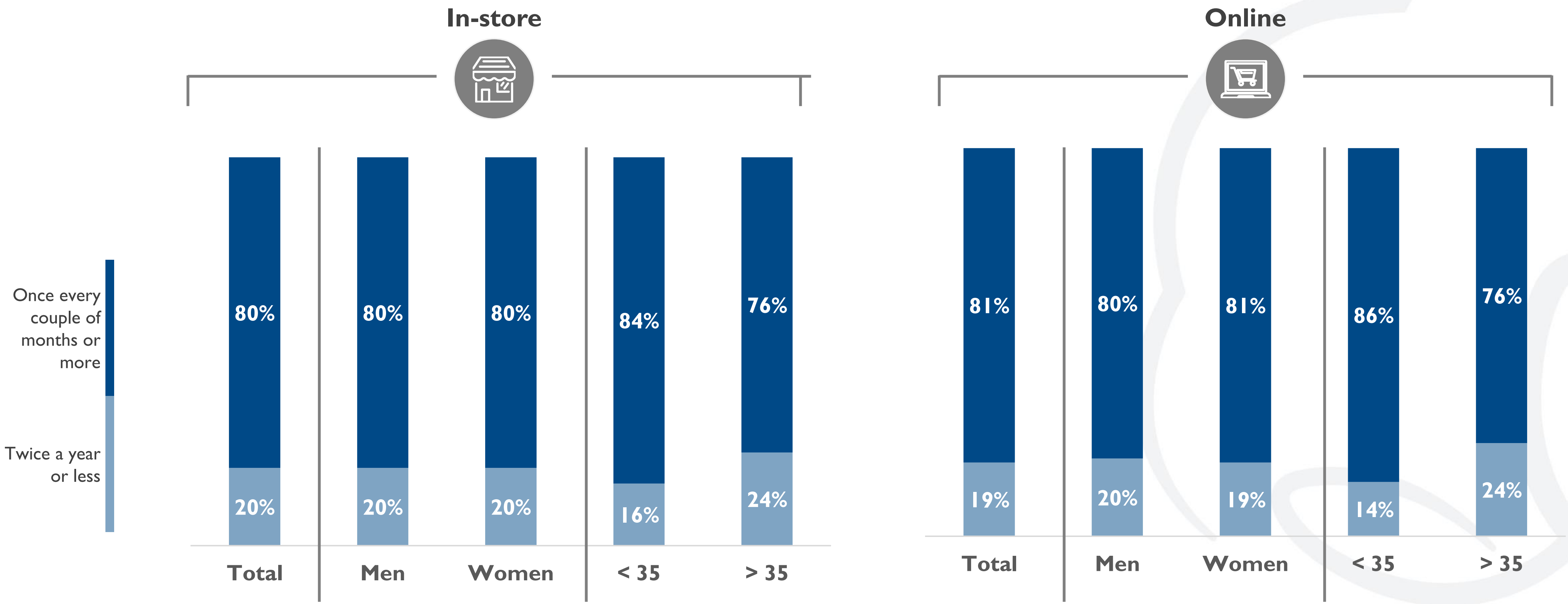
Eight in ten consumers love or somewhat like shopping for clothes.



Base: Total (n=13070) / Q8: Which one of these statements best describes how much you enjoy clothes shopping?

Shopping frequency is consistent across gender, with most purchasing both in-store and online every couple of months. Older consumers shop for clothes less frequently.

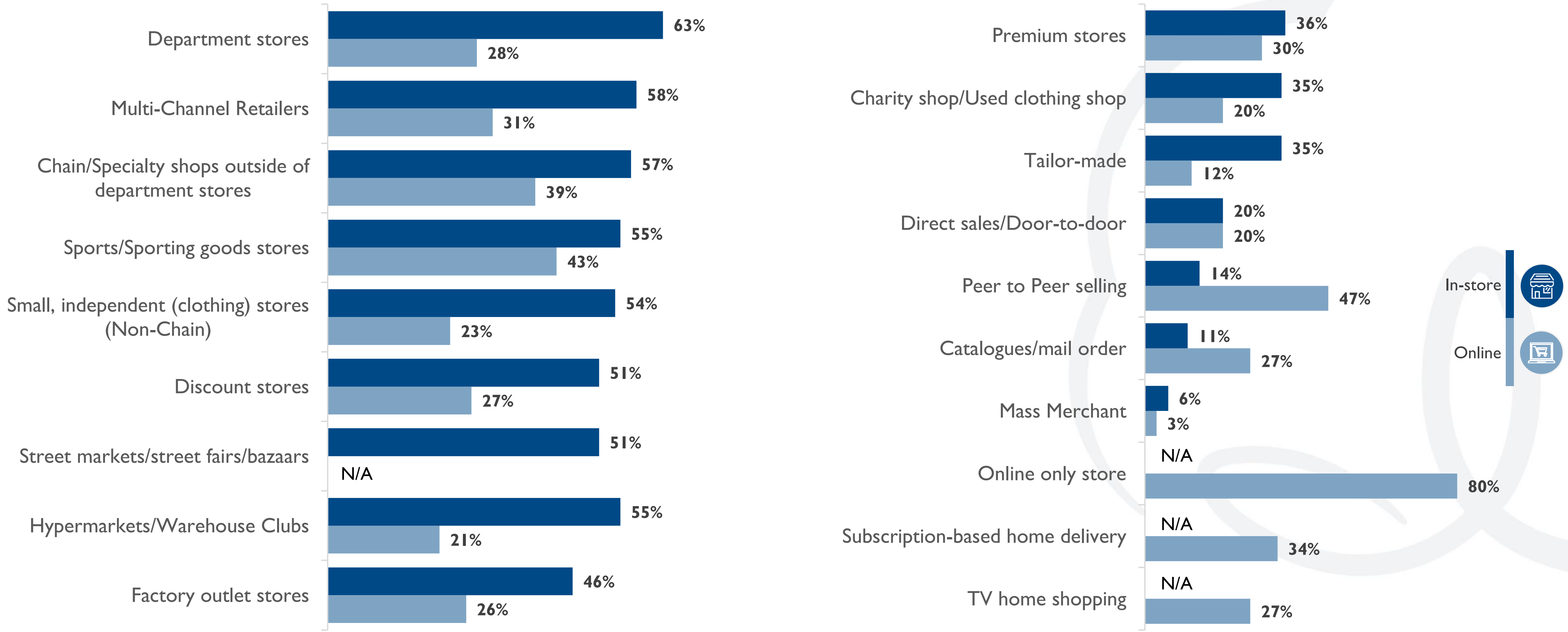
ONLINE AND IN-STORE CLOTHING SHOPPING FREQUENCY



Base: Total (n=13070) / Q1: How often do you shop for clothing online and how often in a physical store?

Most common retail channel for clothing is online-only retailers, followed by department stores and a variety of other in-store channels.

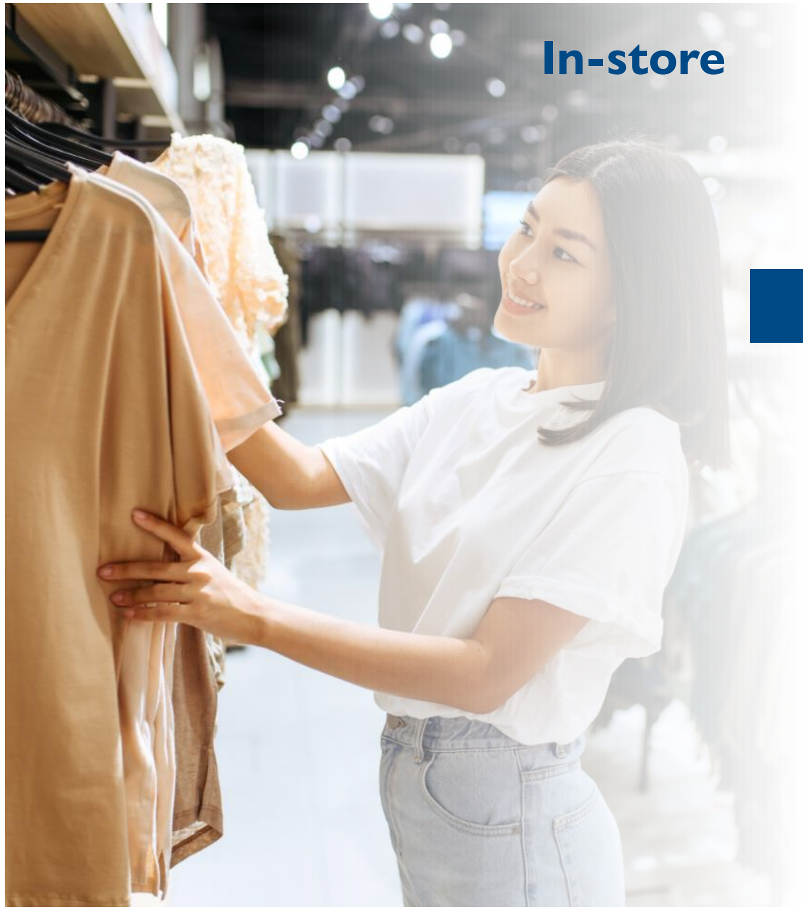
RETAIL CHANNELS SHOPPED FOR CLOTHING



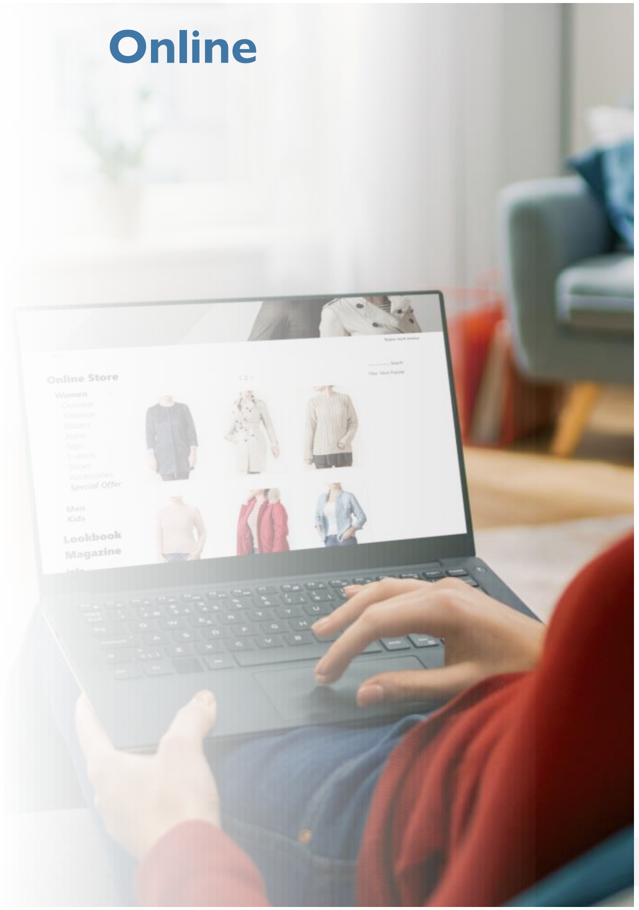
Base: Total (n=13070) / Q5a: What kinds of stores and places do you generally use to buy clothes for yourself?

Online shopping lends itself well to browsing and repeat purchases, while in-store shopping allows for trying on clothing before purchasing.

PREFERRED METHOD ALONG SHOPPING JOURNEY



In-store		Online
23%	Browse	74%
79%	Try On	18%
41%	Pre-Purchase Questions	53%
46%	Purchasing	52%
29%	Repeat Purchasing	66%



In-store Online

Base: Total (n=13070) / Q5b: Please select the one option you most prefer each of the following to occur.

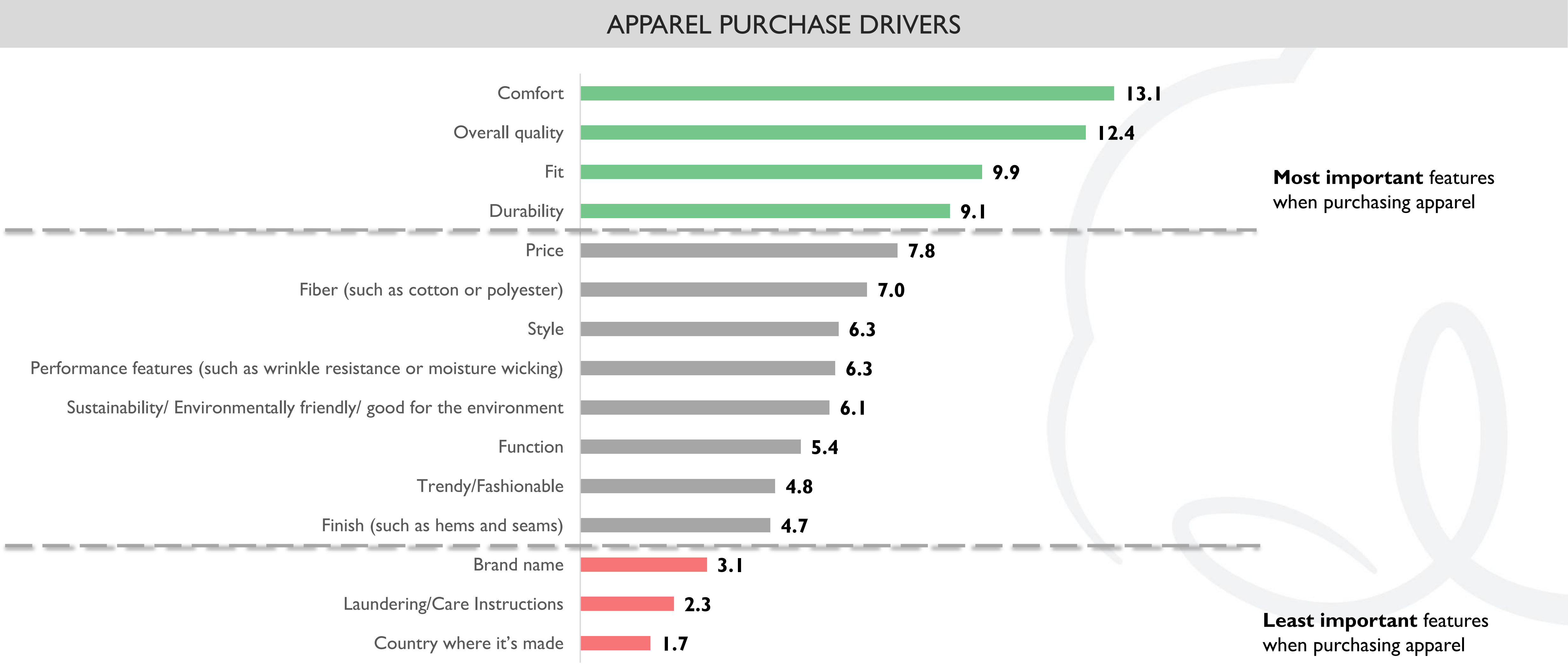
The biggest motivators for in-store shopping are the ability to try on clothes, see the items in person, and to feel the fabric.

REASONS FOR IN-STORE PREFERENCE

	Total	Men	Women	< 35	> 35
To try on clothes before purchase	70%	67%	72%	68%	72%
To see the item in person	64%	62%	65%	61%	66%
To feel the fabric	55%	52%	57%	53%	56%
Don't need to wait for shipping/ Get the item instantly	33%	32%	34%	34%	32%
I like the shopping experience	30%	31%	30%	31%	29%
No shipping costs	29%	27%	31%	29%	28%
It is easier/ more convenient	24%	26%	23%	24%	24%
Customer service	18%	21%	16%	19%	18%
I don't like shopping online	5%	5%	4%	5%	5%

Base: Prefer in-store (n=11537) / Q5c: Why do you prefer to shop for clothing in a physical store?

The most important features for clothing purchases are comfort, quality, fit, and durability. Brand name, care instructions, and country of origin are least important.



Base: Total (n=13070) / Q13: Please select the statement that is most important and the one that is least important to you when deciding whether to purchase an item of clothing.

Comfort is most important for all, but particularly for those over 35.

APPAREL PURCHASE DRIVERS

	Total	Men	Women	< 35	> 35
Comfort	13.1	13.0	13.2	12.8	13.4
Overall quality	12.4	12.5	12.4	12.2	12.6
Fit	9.9	9.7	10.0	9.4	10.4
Durability	9.1	9.3	8.8	9.0	9.2
Price	7.8	7.6	8.0	7.5	8.0
Fiber (such as cotton or polyester)	7.0	6.9	7.2	6.9	7.2
Style	6.3	6.2	6.5	6.6	6.1
Performance features (such as wrinkle resistance or moisture wicking)	6.3	6.3	6.2	6.4	6.1
Sustainability/ Environmentally friendly/ good for the environment	6.1	6.0	6.2	6.6	5.7
Function	5.4	5.5	5.4	5.2	5.6
Trendy/Fashionable	4.8	4.7	4.8	5.3	4.3
Finish (such as hems and seams)	4.7	4.6	4.7	4.6	4.7
Brand name	3.1	3.6	2.7	3.3	2.9
Laundering/Care Instructions	2.3	2.3	2.3	2.4	2.2
Country where it's made	1.7	1.9	1.6	1.8	1.6

Most important features when purchasing apparel

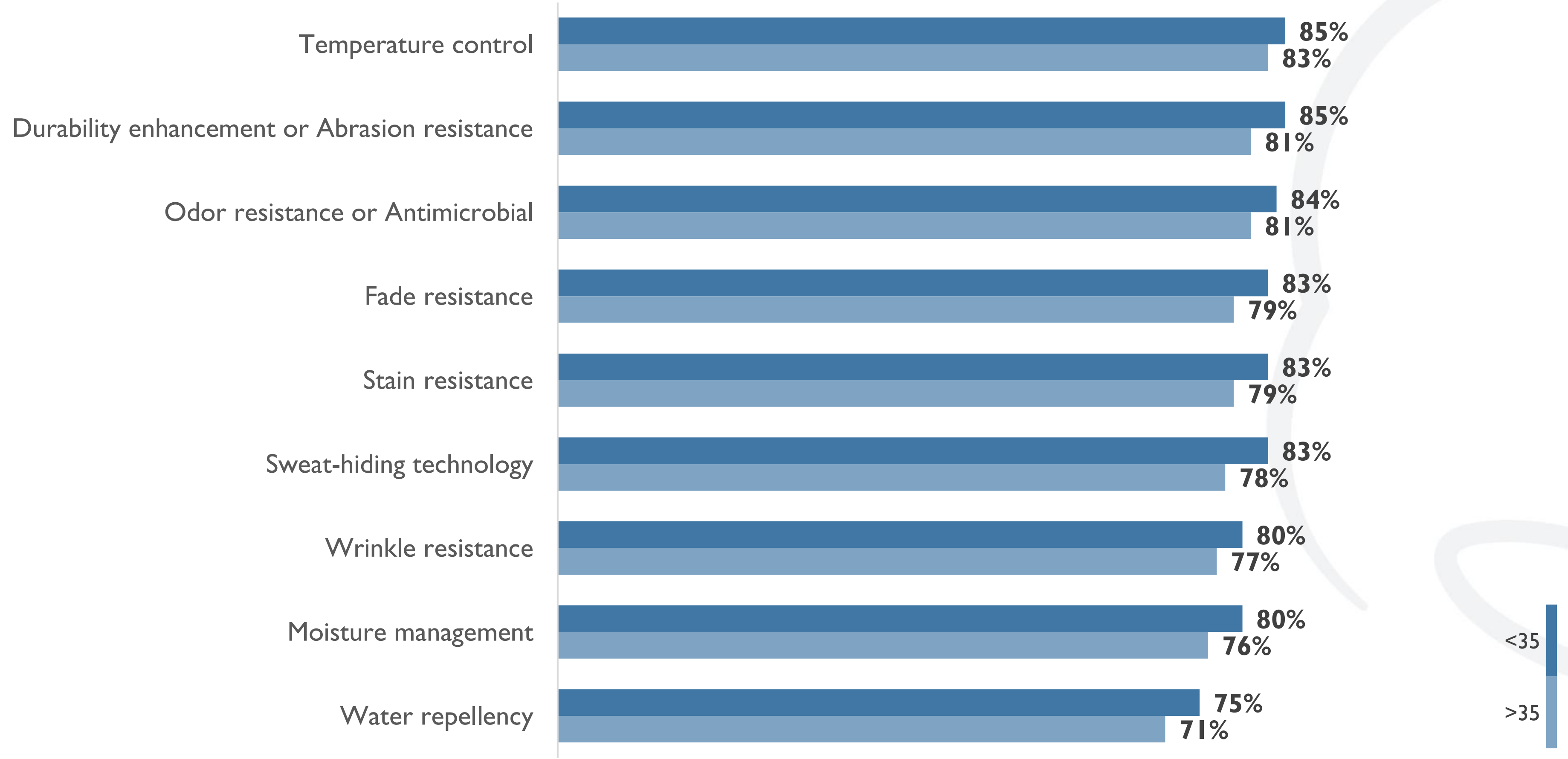
Least important features when purchasing apparel

Base: Total (n=1000) / Q13: Please select the statement that is most important and the one that is least important to you when deciding whether to purchase an item of clothing.

People are more willing to pay extra for features that provide an additional benefit, particularly temperature control, durability enhancement, and resistance to odors, fading, stains, and wrinkle resistance.

PAY MORE FOR PERFORMANCE APPAREL

% Very likely / Somewhat likely (T2B) to pay more for everyday clothing – Sorted by Total

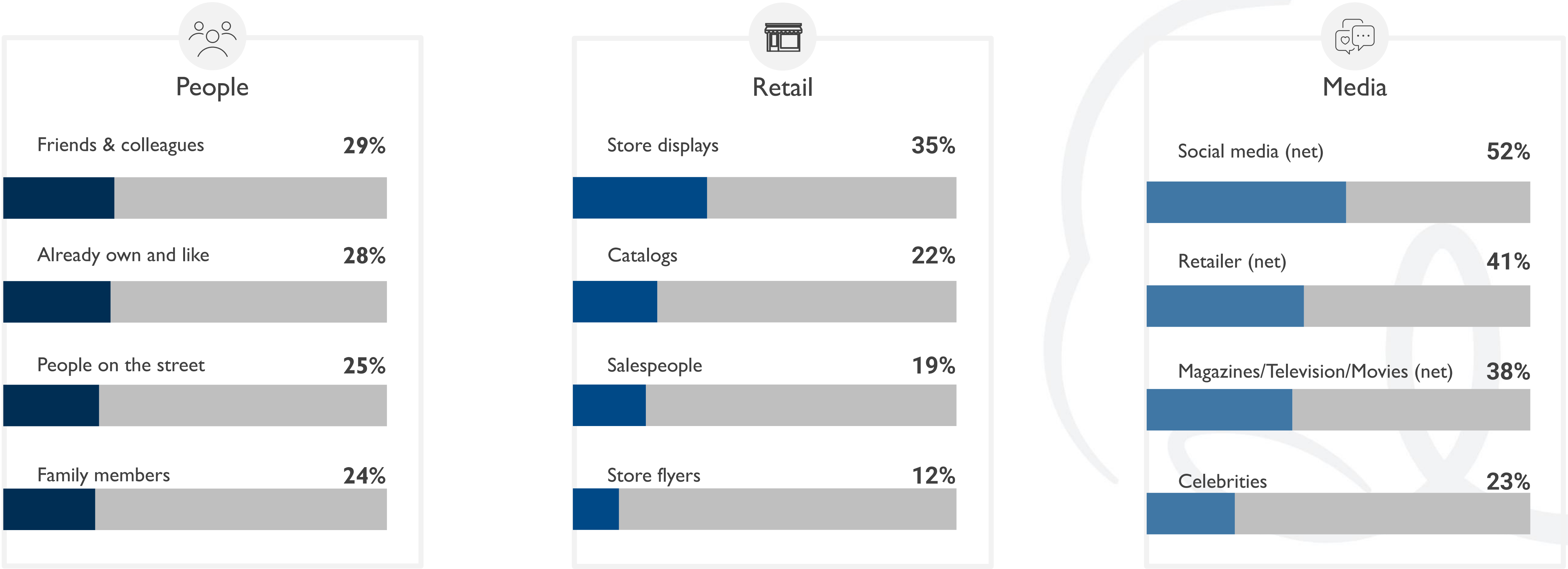


Base: Total (n=13070) / Q20: How likely would you be to pay more for everyday clothing with the following performance features?

2023 CCI & Cotton Incorporated's Global Lifestyle Monitor Survey

Top sources of inspiration for clothing ideas are social media (overall and from a retailer), media (magazines/TV/Movies), and store displays.

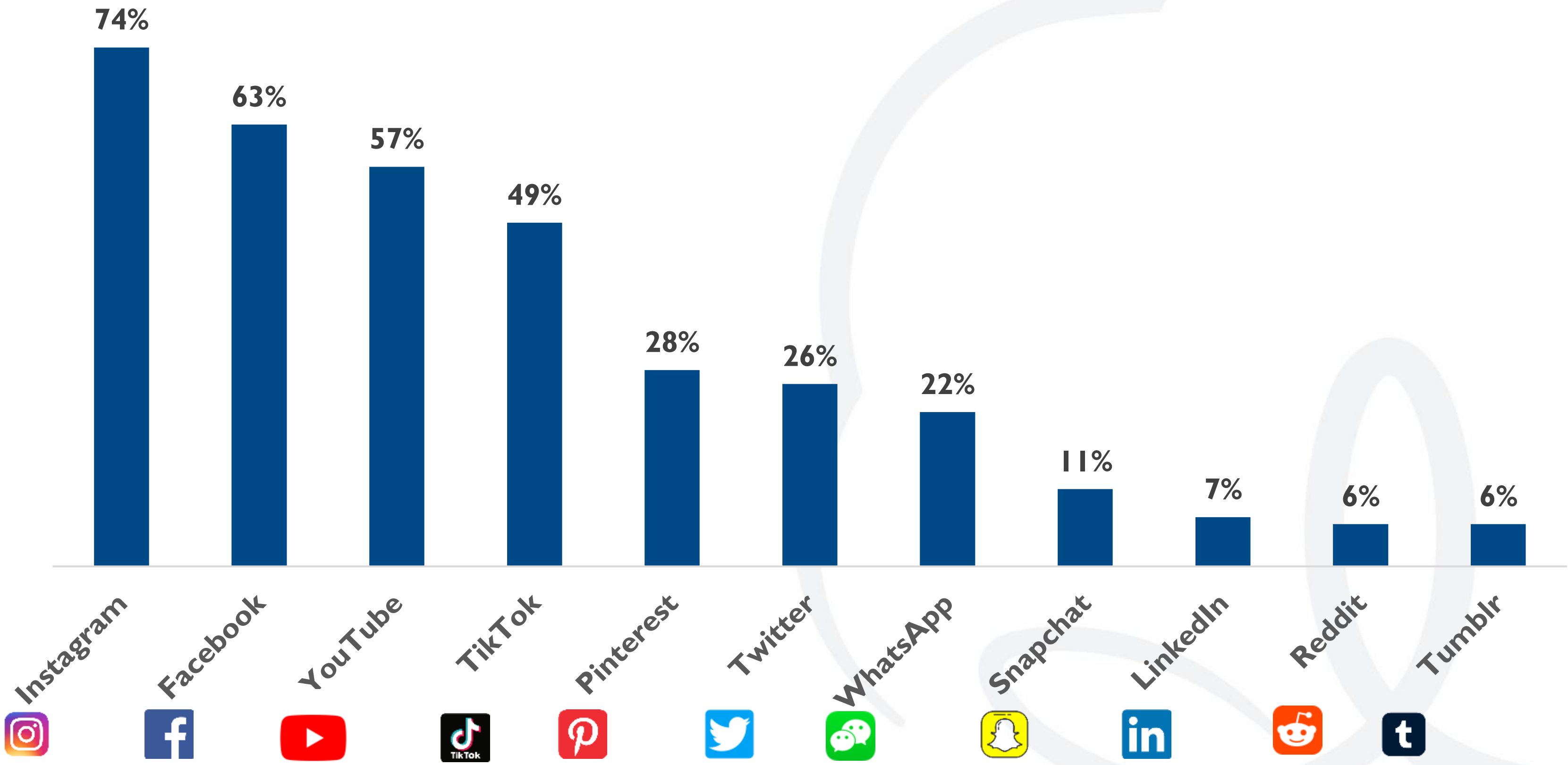
SOURCES OF CLOTHING IDEAS



Base: Total (n=13070) / Q9: From which of these places do you get your ideas for clothes?

Instagram, Facebook, and YouTube are top social media sources for clothing ideas.

SOCIAL MEDIA SOURCES FOR CLOTHING IDEAS



Base: Those who use social media for clothing ideas (n=5781) / Q10: From which social media sites do you get your ideas for clothes?

THE CONSUMER WARDROBE

People own more comfortable items like underwear and t-shirts, followed by casual shirts and dresses. They have fewer pairs of dress pants.

NUMBER OF CLOTHING ITEMS - MEAN

	Total	Men	Women	< 35	> 35
Pairs of casual slacks (excluding jeans)	5.8	5.6	6.0	5.9	5.8
Pairs of dress pants	4.4	4.5	4.3	4.5	4.3
Dress shirts	6.4	6.9	6.0	6.3	6.6
Casual shirts (excluding t-shirts)	7.4	7.4	7.5	7.5	7.4
T-shirts	11.5	11.5	11.6	10.9	12.2
Underwear	13.5	11.6	15.3	13.2	13.7
Skirts	5.6	N/A	5.6	5.7	5.5
Dresses	7.6	N/A	7.6	7.8	7.3
Athletic shirts	5.9	6.1	5.6	5.8	5.9
Athletic shorts/pants	6.0	6.0	6.0	6.3	5.7

Base: Varying Sizes / Q14: How many of the following clothing items do you own?

Denim is a popular choice across all occasions for men, while women's choices are a mix of denim, dresses, and other attire. When consumers are at home, they tend to wear casual items like shorts and knit trousers.

BOTTOM WEAR OCCASION

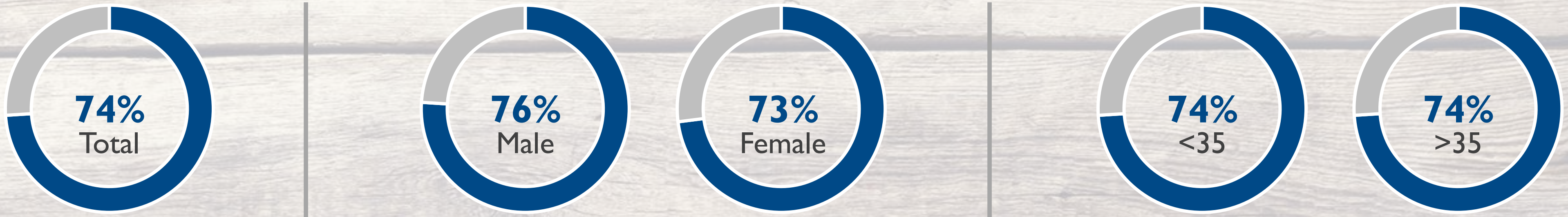
		Work	Out to Dinner	Running errands or shopping	Hanging out at home	Want to look/ feel good	Want to be comfortable	Want to be stylish	When traveling
Leggings	Men	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Women	4%	3%	7%	11%	4%	9%	3%	7%
Non-active knit trousers	Men	4%	3%	6%	16%	4%	14%	3%	6%
	Women	4%	2%	7%	22%	4%	19%	2%	9%
Athletic shorts/ trousers	Men	4%	5%	11%	24%	7%	20%	4%	12%
	Women	3%	3%	8%	17%	4%	14%	2%	10%
Skirts or Dresses	Men	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	Women	12%	33%	9%	7%	32%	8%	37%	11%
Casual shorts / capris	Men	6%	10%	14%	25%	10%	21%	8%	14%
	Women	5%	7%	10%	19%	7%	15%	6%	10%
Denim jeans	Men	30%	39%	38%	14%	35%	18%	34%	37%
	Women	22%	24%	33%	9%	23%	13%	21%	27%
Dress pants	Men	31%	20%	10%	6%	21%	7%	27%	9%
	Women	28%	13%	6%	4%	13%	5%	18%	6%
Casual slacks (excluding jeans)	Men	24%	24%	21%	15%	24%	19%	23%	22%
	Women	21%	15%	20%	13%	14%	17%	12%	19%

Base: Total (n=13070) / Q6: Which one of the following bottoms wear types do you prefer to wear for the following occasions?

Most people across the globe enjoy wearing denim.

ATTITUDES TOWARDS DENIM

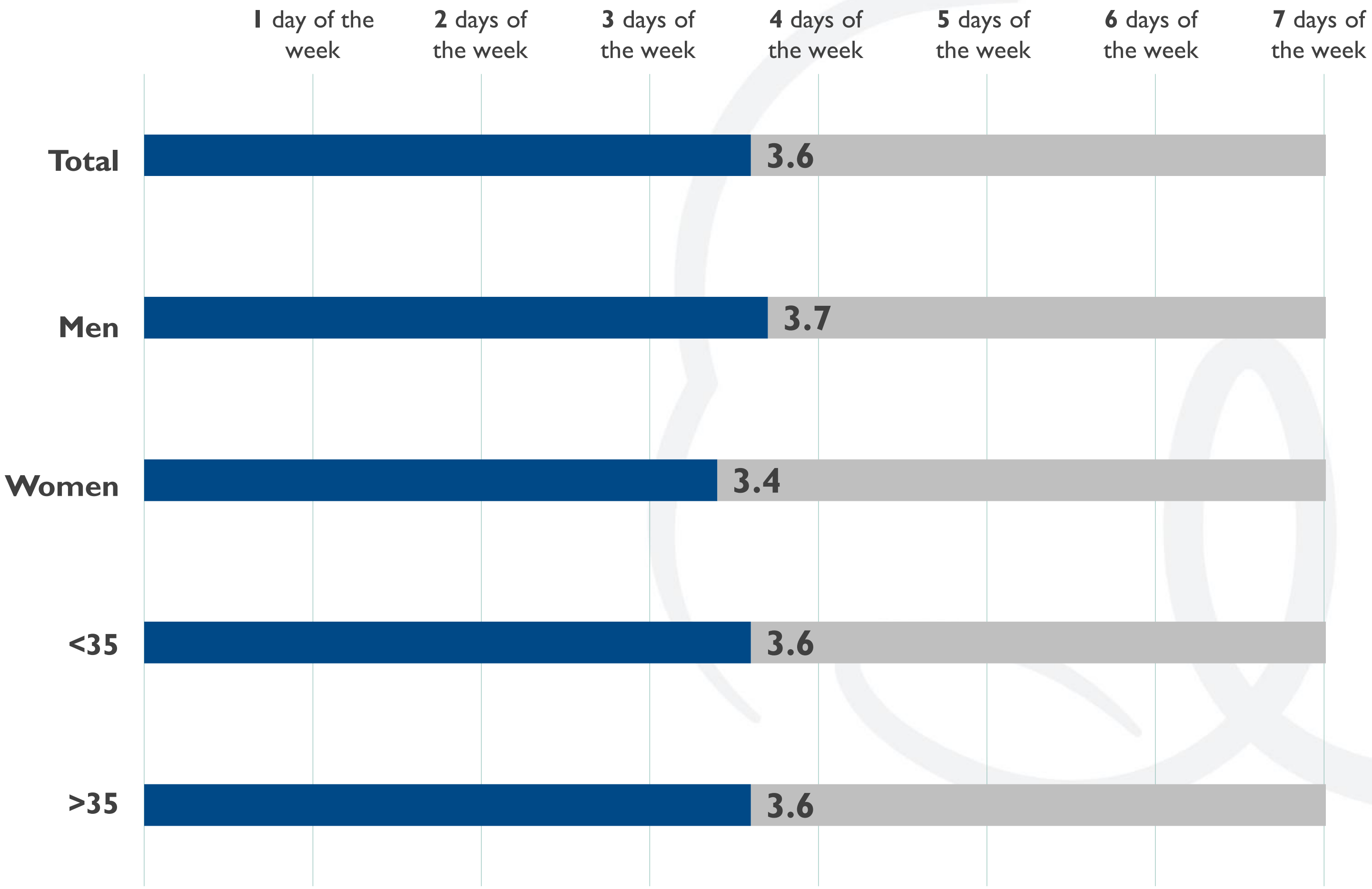
Percent of consumers who love/enjoy wearing denim



Base: Total (n=13070) / Q16: Which one of the following statements best describes your attitude toward denim/jeanswear products?

On average, consumers wear denim 3-4 days per week.

DAYS WEARING DENIM



Base: Total (n=13070) / Q15: On average, how many days a week do you put on jeans or denim shorts?

COTTON: THE NATURAL CHOICE

Cotton has much more positive perceptions of comfort, softness, quality, authenticity and sustainability compared to other fibers.

ATTRIBUTES ASSOCIATED WITH CLOTHING FIBERS

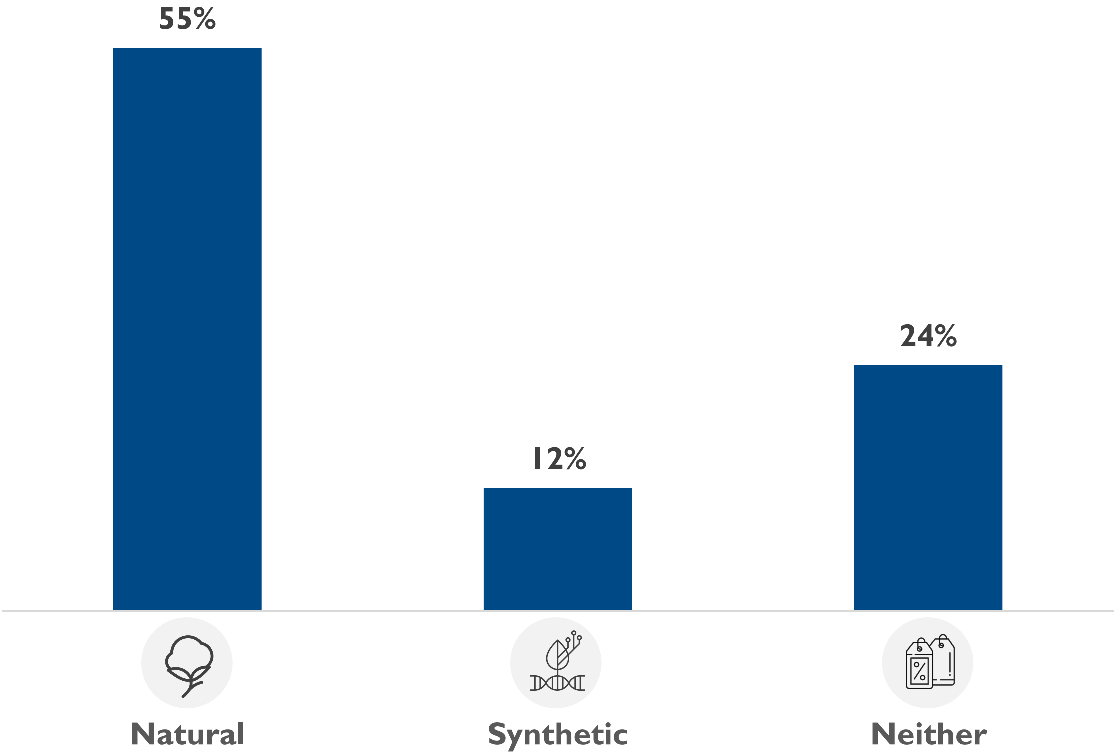
	Clothing made from cotton	Clothing made from polyester	Clothing made from rayon fibers such as viscose, lyocell, and Tencel
Most comfortable	65%	13%	15%
Softest	63%	11%	18%
Best quality	56%	14%	18%
Most authentic	55%	14%	18%
Most sustainable	53%	15%	16%
Can be worn for multiple occasions	45%	21%	22%
Lasts the longest	42%	25%	19%
Most fashionable	34%	20%	28%
Falls apart the most	27%	22%	22%
Has the biggest odor issue or causes trap odor	26%	29%	20%

Base: Total (n=13070) / Q21: Based on your clothing buying and wearing experiences, please select which type of clothing is best described or represented by each of the attributes.

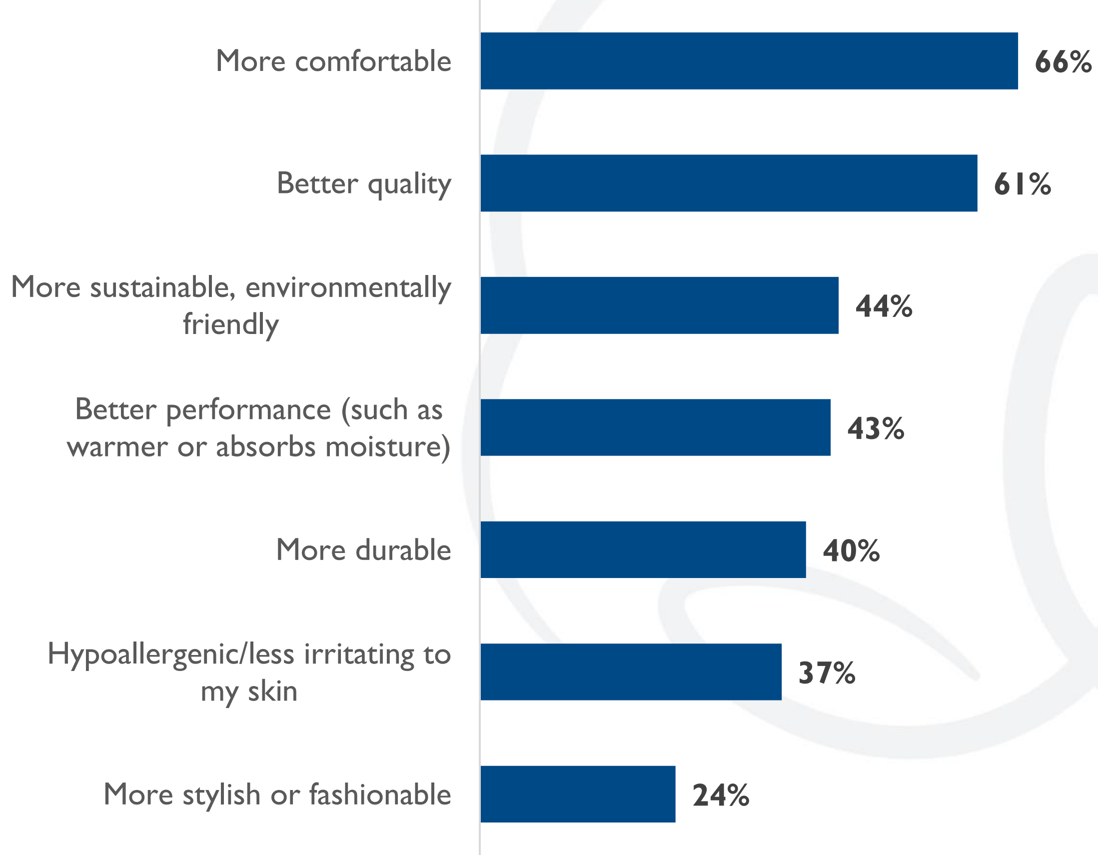
More than half would pay more money for clothing made from natural fibers because they are more comfortable and better quality.

PAY MORE FOR CLOTHING FIBERS

Would you pay more money for clothing made from…



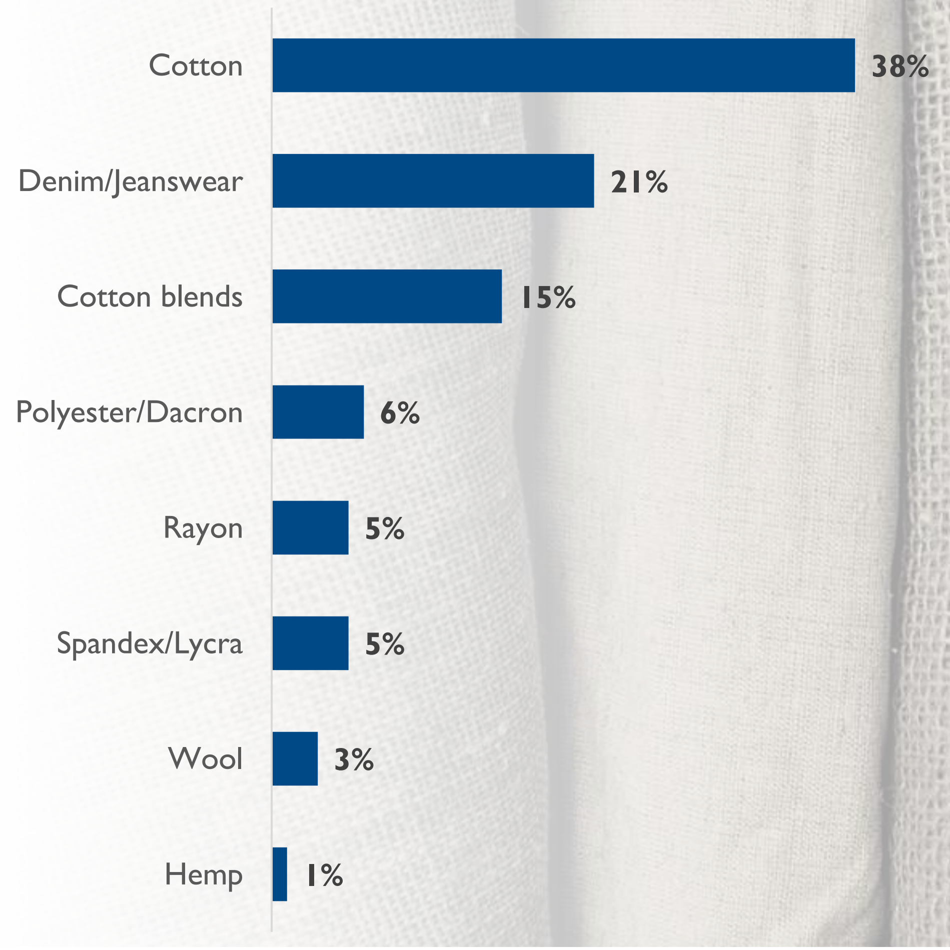
Why pay more for natural fibers



Base: Total (n=13070) / Q17: Would you say you would…?
Base: Those who would pay more for natural fibers (n=7152) / Q18: Why would you pay more for clothes made from natural fibers such as cotton?

Over one-third of consumers prefer clothing made with cotton. Denim and cotton blends are also preferred fabrics.

MATERIAL PREFERENCE



Base: Total (n=13070) / Q11: What one fiber or material would you prefer for the clothing in your wardrobe that you wear the most?

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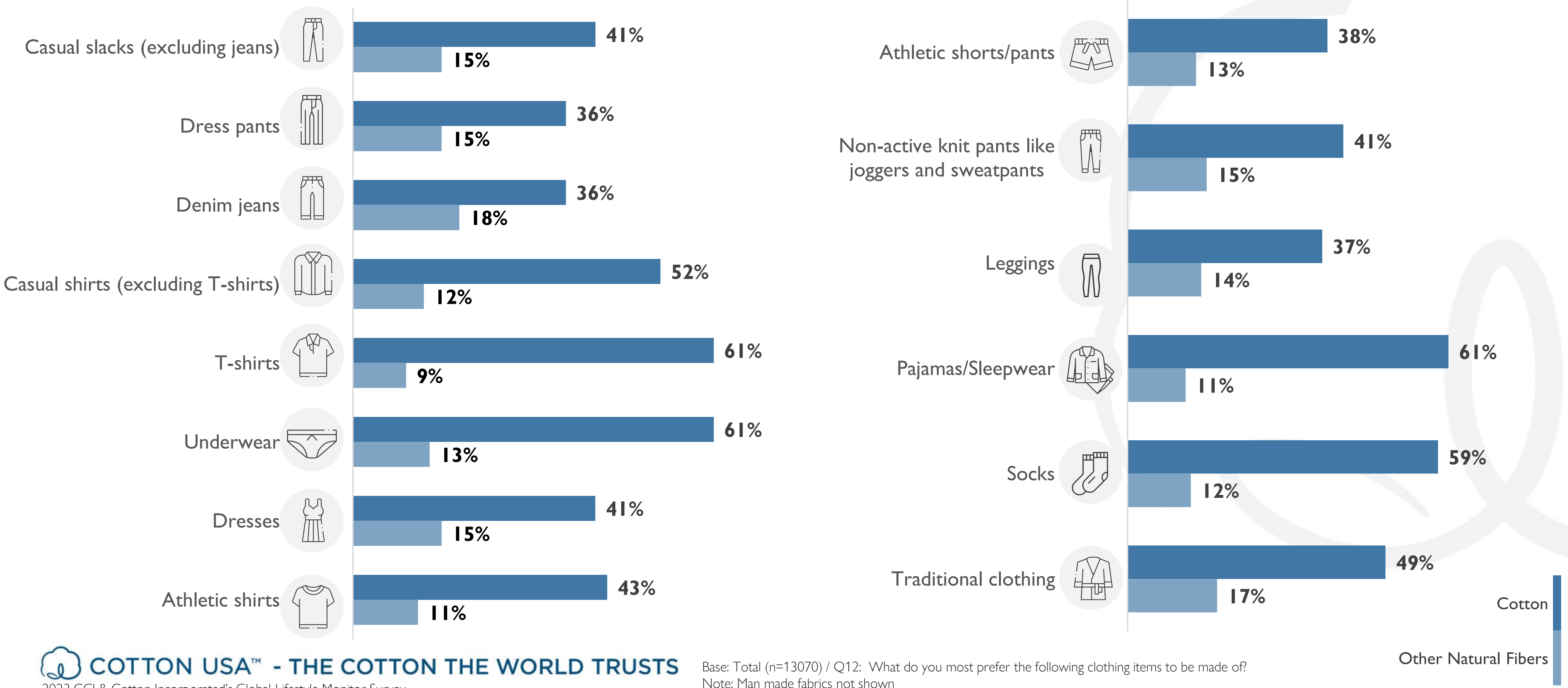
Cotton is preferred over other natural fibers across all clothing categories, particularly those typically tied to more comfortable activities: sleepwear, t-shirts, and underwear.

COTTON & COTTON BLENDS PREFERENCES



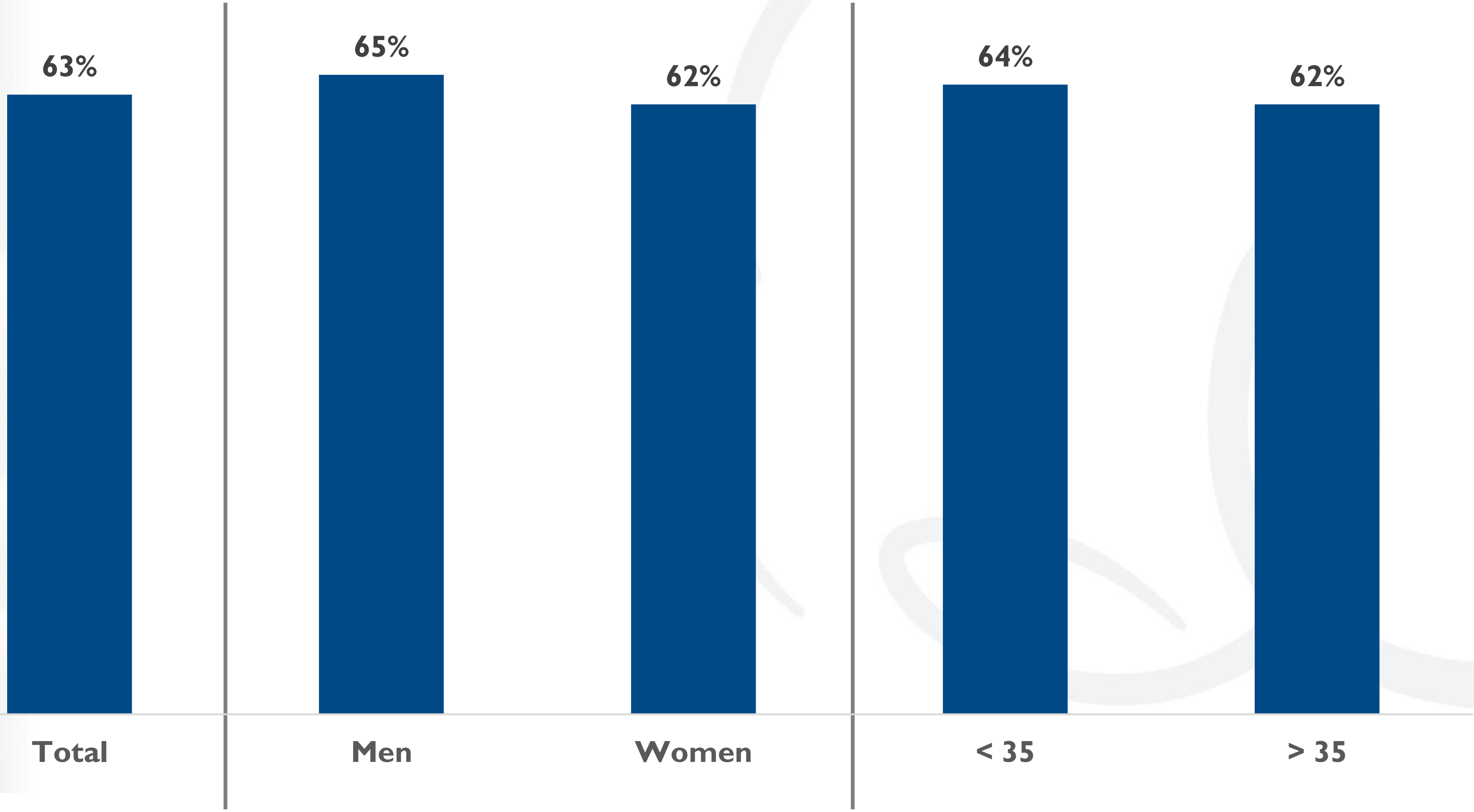
Base: Total (n=13070) / Q12: What do you most prefer the following clothing items to be made of?
Note: Man made fabrics not shown

Nearly two-thirds look for fiber content labels.

FIBER CONTENT LABEL

Percent of consumers who always / most of the time look for fiber content labels

% Always / Most of the time (T2B)



Base: Total (n=13070) / Q19: How often do you look for the fiber content labels in a garment before purchasing?

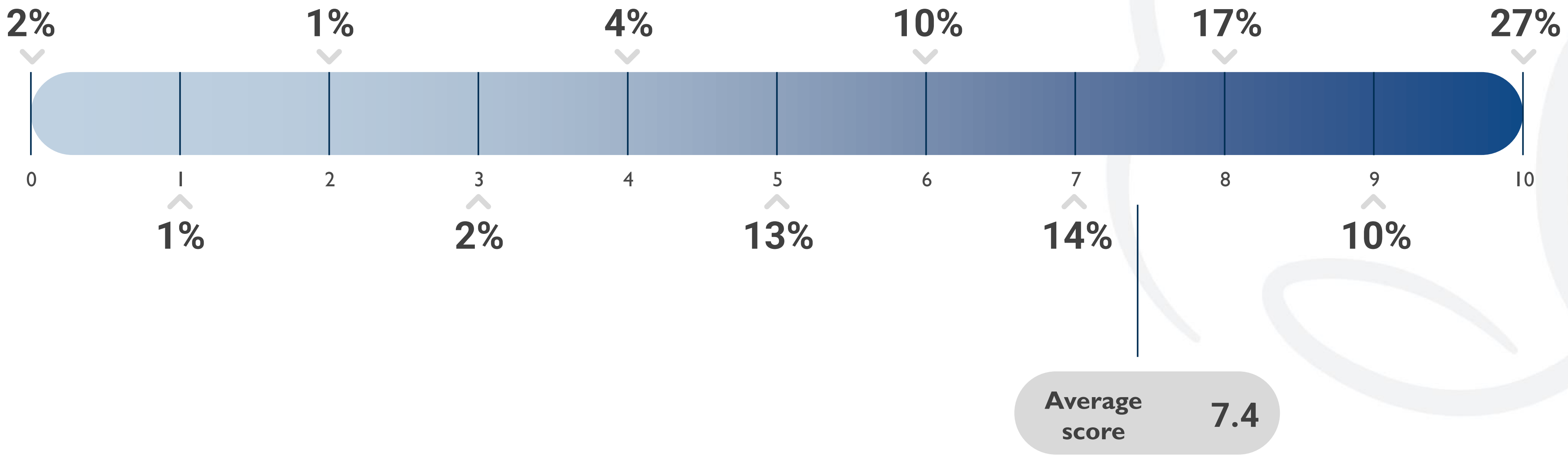
SUSTAINABILITY AND THE ENVIRONMENT

The majority of people are concerned about environmental change/resource depletion and believe they need to change their behaviors to help.

ENVIRONMENTAL CONCERNS

Concerns about environmental change and resource depletion are greatly exaggerated and **do not require change in our behaviors**

Concerns about environmental change and resource depletion are very real and **require change in our behaviors**



Base: Total (n=13070) / Q22: Which one is the closest to your personal views about sustainability and environmental change in general, from 0 to 10?

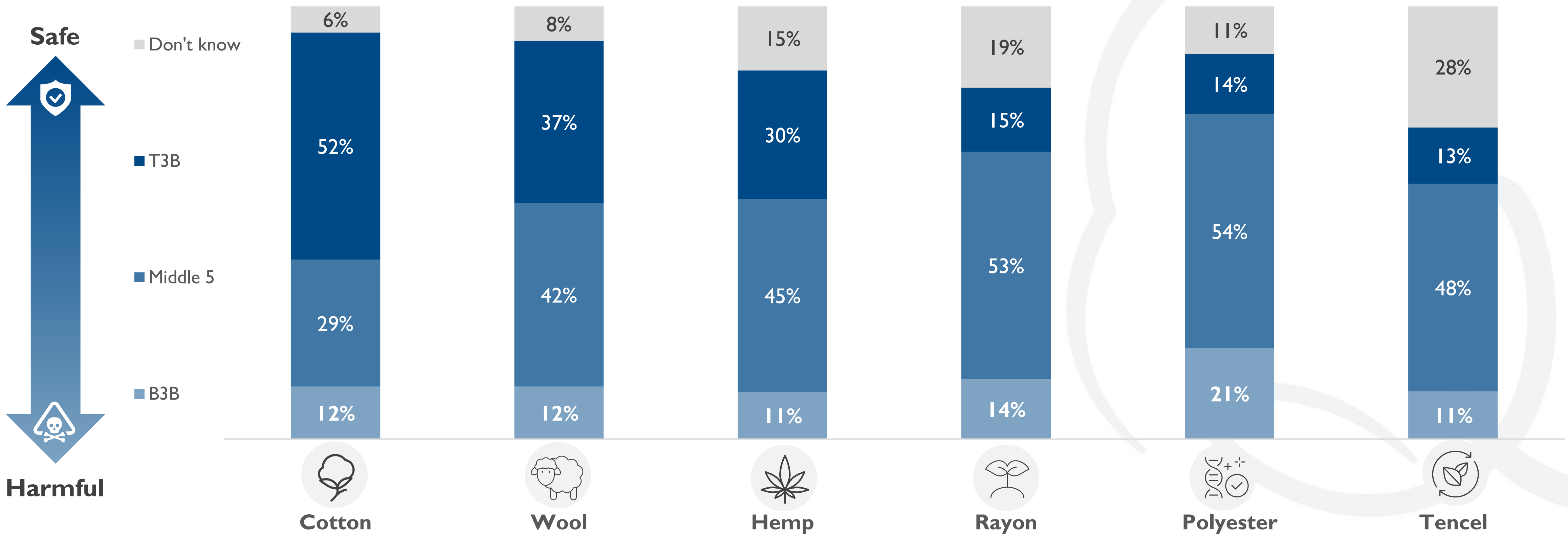
More than half have become more concerned about sustainability and environmental issues over the past year.

CHANGES IN ENVIRONMENTAL CONCERNS

Base: Total (n=13070) / Q23: Generally speaking, how have your concerns about sustainability/environmental issues changed over the past year?

Cotton, Wool, and Hemp are viewed as the safest fibers for the environment. Tencel has the most uncertainty around its safety.

SAFETY OF FIBERS TO ENVIRONMENT



Base: Total (n=13070) / Q24: In your opinion how safe or harmful are these fibers to the environment?

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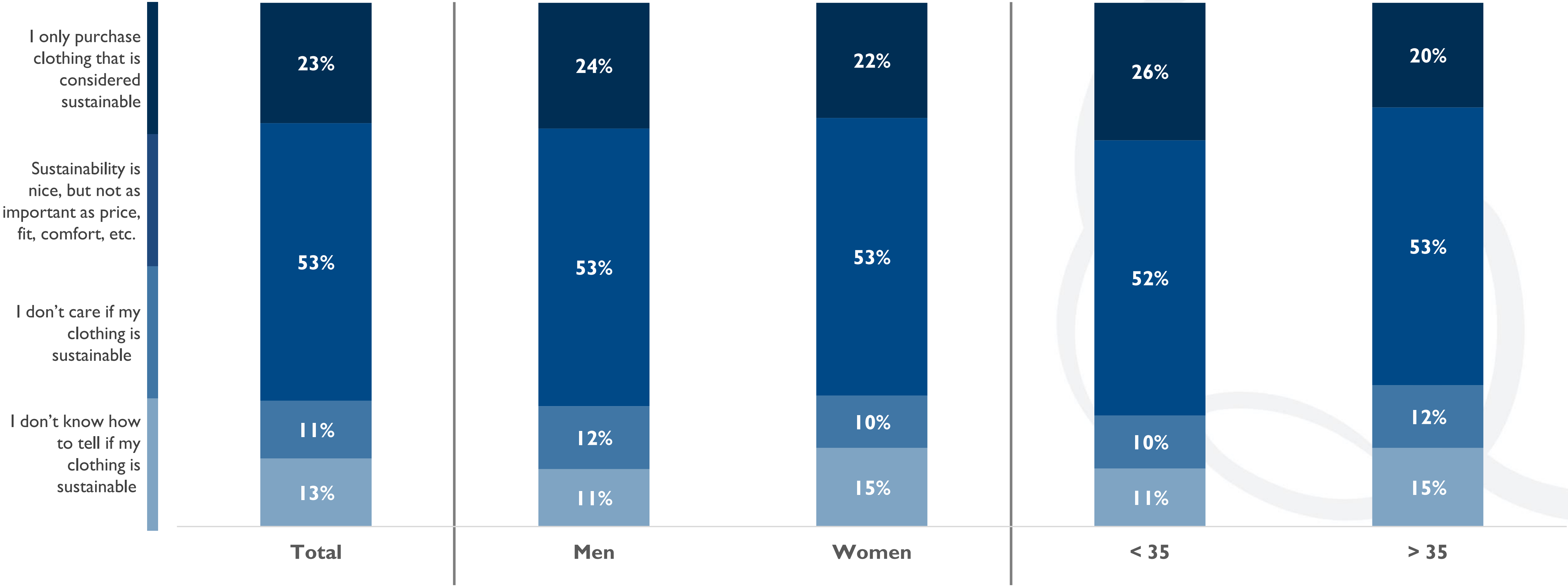
However, sustainable clothing is a nice-to-have for most consumers.

SUSTAINABILITY IMPORTANCE



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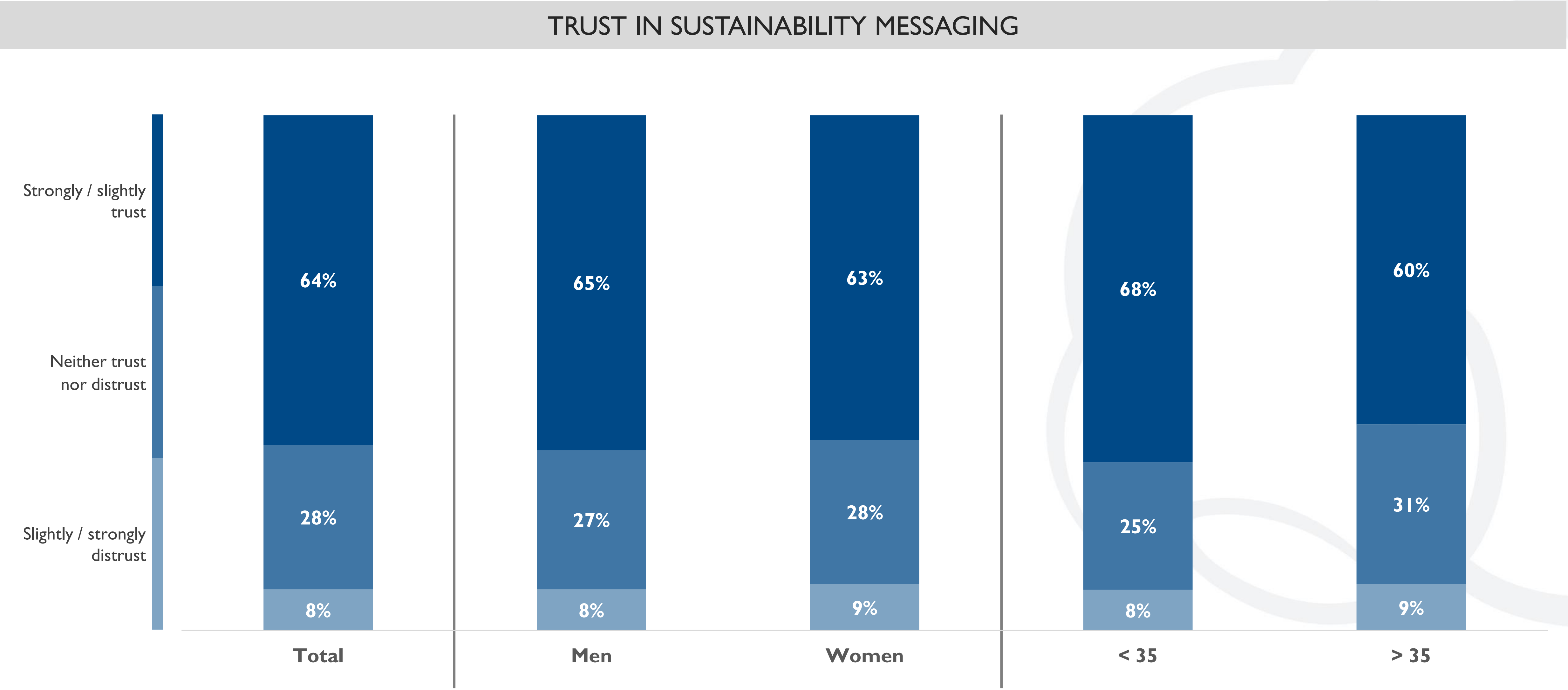
Base: Total (n=13070) / Q25a: Which statement most accurately describes your thoughts on sustainable clothing?

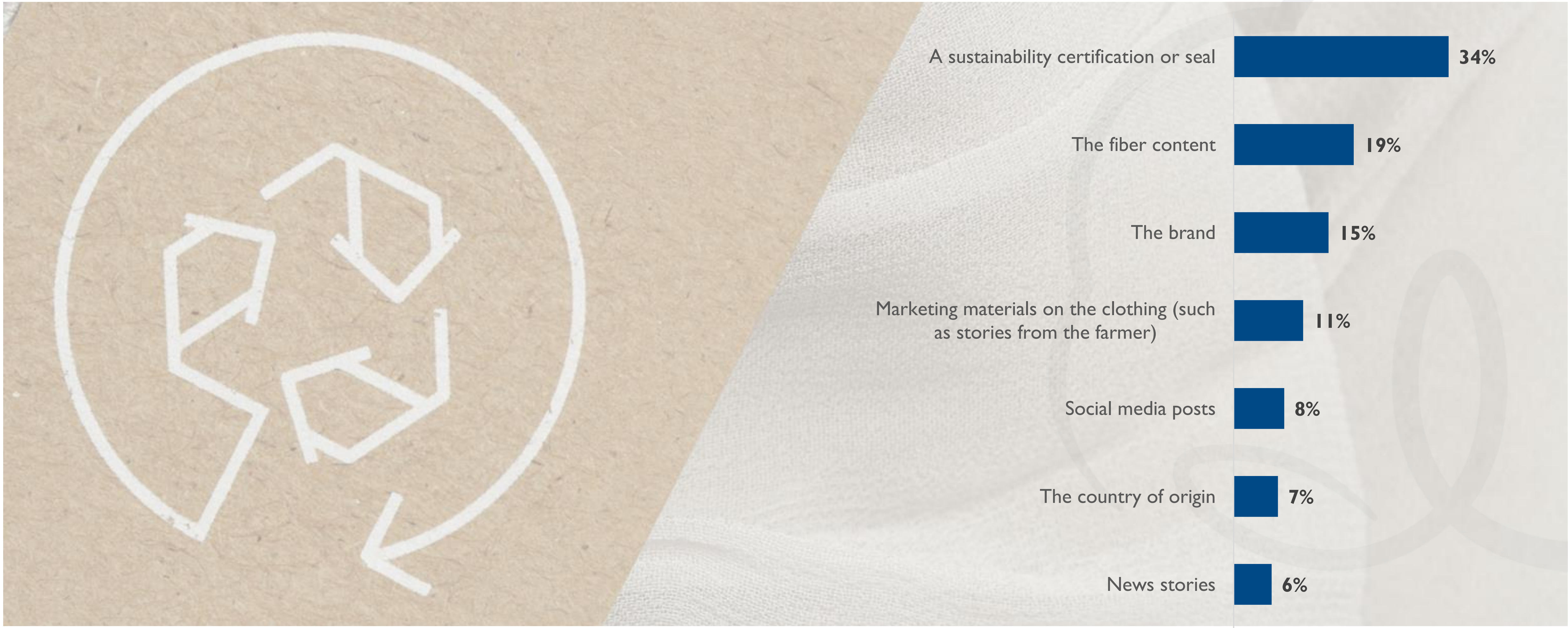
Many consumers trust sustainability messaging on clothing. This is higher among younger consumers.



Base: Total (n=13070) / Q25b: Please select how much you trust or distrust sustainability messaging on clothing?

A sustainability certification or seal is the most trusted way for consumers to determine if the apparel was made in an environmentally-friendly manner.

TRUSTED SOURCES FOR ENVIRONMENTALLY-FRIENDLY APPAREL INFO



Base: Total (n=13070) / Q25c: On which of the following would you most rely on to determine whether clothing was made in an environmentally friendly manner?