

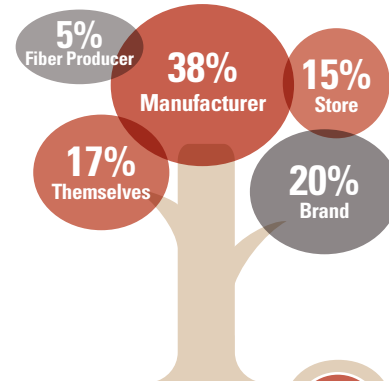
GLOBAL LIFESTYLE MONITOR: THE UNITED KINGDOM

CONSUMERS ON SUSTAINABILITY AND APPAREL

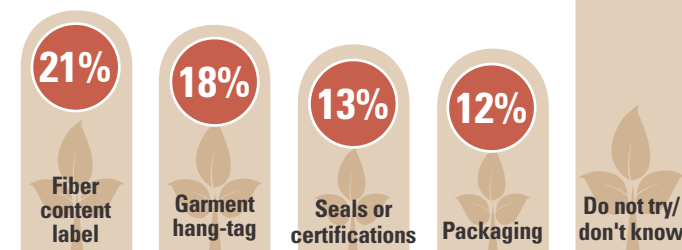
IMPORTANCE OF SUSTAINABILITY IN APPAREL PURCHASES

While sustainability is not a primary purchase driver among British consumers, they expect clothing to be made using sustainable practices and with natural fibers like cotton.

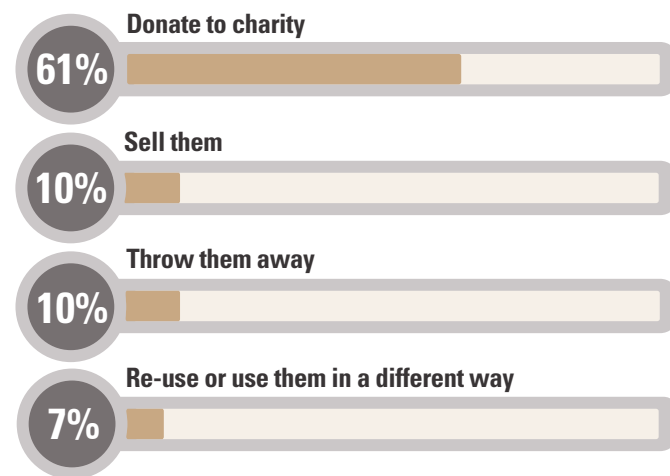
WHO DO BRITISH CONSUMERS HOLD ACCOUNTABLE FOR NON-SUSTAINABLE APPAREL?



HOW DO CONSUMERS DETERMINE WHETHER A GARMENT IS SUSTAINABLE?



HOW DO CONSUMERS DISPOSE OF GARMENTS THEY NO LONGER WEAR?



39%

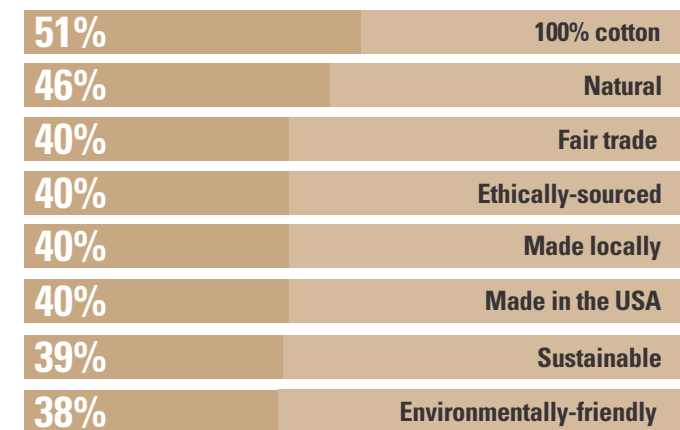
Say environmentally-friendly is important in their apparel purchase decisions

23%

Say they seek out environmentally-friendly clothing

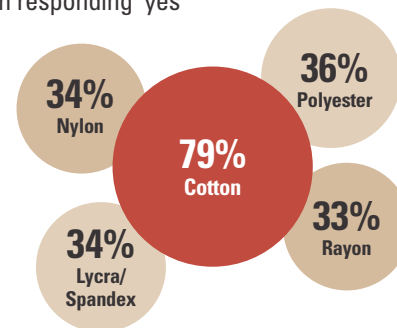
MARKETING TERMS THAT ARE VERY OR SOMEWHAT LIKELY TO INFLUENCE CONSUMER APPAREL PURCHASE DECISIONS

Like their German and Italian counterparts, British consumers say that 100% cotton is the marketing term that is more likely to influence their clothing purchase decisions when compared to other sustainability terms.



CONSUMER RANKINGS OF FIBERS AS SAFE FOR THE ENVIRONMENT

% of British responding "yes"



COTTON LEADS™

For more information about making a commitment to responsible global cotton production practices, visit www.cottonleads.org

INSIGHTS

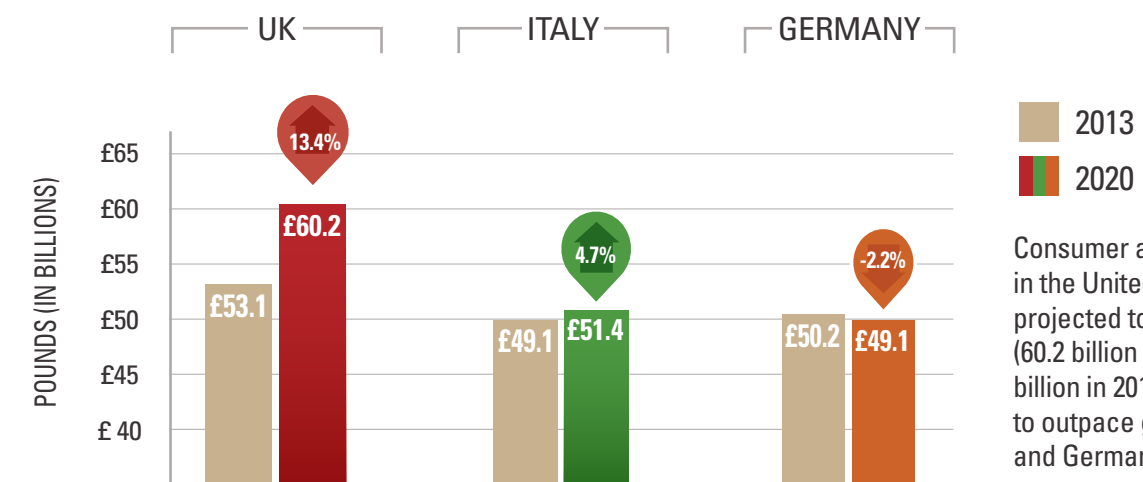


GLOBAL LIFESTYLE MONITOR: THE UNITED KINGDOM

Price-conscious British consumers say that they are *paying more money and getting less value from their clothing*. Understanding apparel shoppers' price, quality, and sustainability expectations is essential for brands and retailers to enhance sales and remain competitive.



APPAREL SPENDING IN EUROPE: 2013 VS. PROJECTED SPENDING IN 2020



Consumer apparel spending in the United Kingdom is projected to grow by 13.4% (60.2 billion in 2020, up from 53.1 billion in 2013) and is estimated to outpace growth in both Italy and Germany in 2020.¹

KEY TRENDS AMONG BRITISH CONSUMERS



UK consumers continue to become more price-conscious shoppers by shopping at lower priced channels, shopping on sale, planning purchases, and shopping less often.



Experiences with performance issues like wear and tear, pilling, and stretch recovery may be why most consumers are bothered by fiber substitution away from cotton.



Quality is a primary driver for apparel purchases, but most UK shoppers say they are paying more and getting less value from their clothing.



UK shoppers look to fiber content labels to determine whether a garment is sustainable and they continue to see cotton as the safest fiber for the environment.

Source: Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2014 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. External Source: Euromonitor International¹

GLOBAL LIFESTYLE MONITOR: THE UNITED KINGDOM

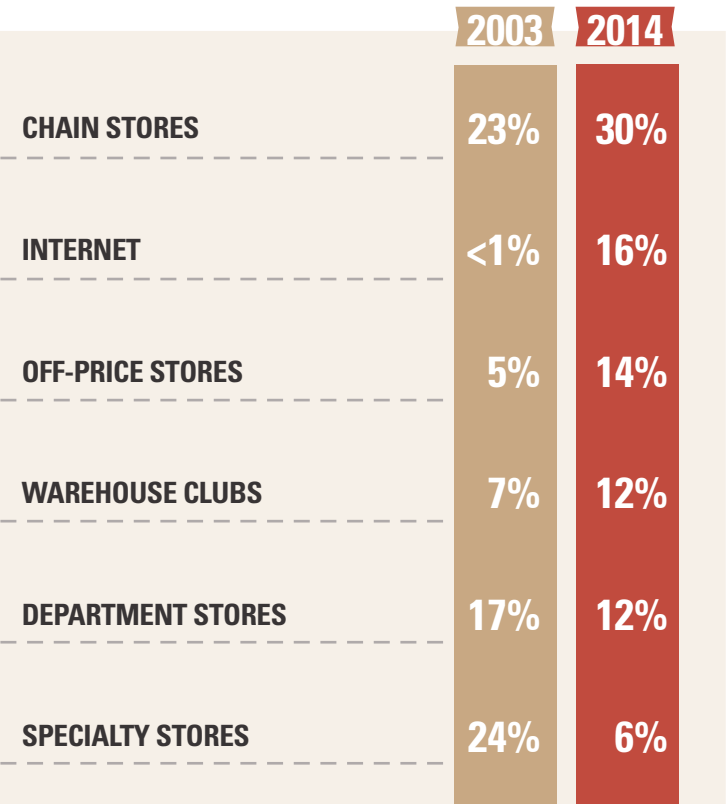
CONSUMER APPAREL SHOPPING ATTITUDES AND HABITS



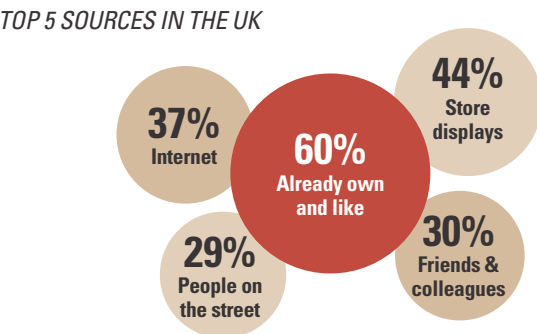
WHAT RETAIL CHANNELS ARE SHOPPED THE MOST FOR CLOTHING IN THE UK?

British consumers shopping at specialty stores has declined significantly within the past decade, at the same time that Internet shopping has surged.

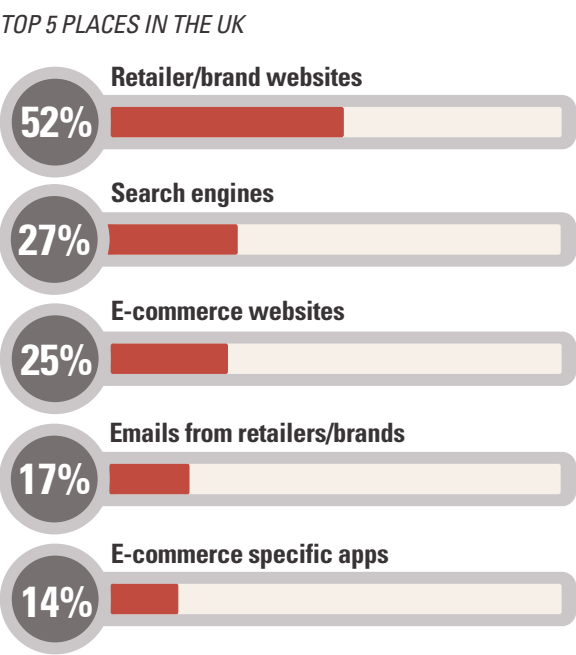
Like their German and Italian counterparts, British consumers rank chain stores as the top place they shop most for clothing.



WHAT ARE CONSUMERS' TOP SOURCES OF IDEAS FOR NEW CLOTHES?



WHERE ARE THE TOP PLACES CONSUMERS START SHOPPING ONLINE FOR CLOTHING ?



SATISFYING CONSUMER QUALITY EXPECTATIONS

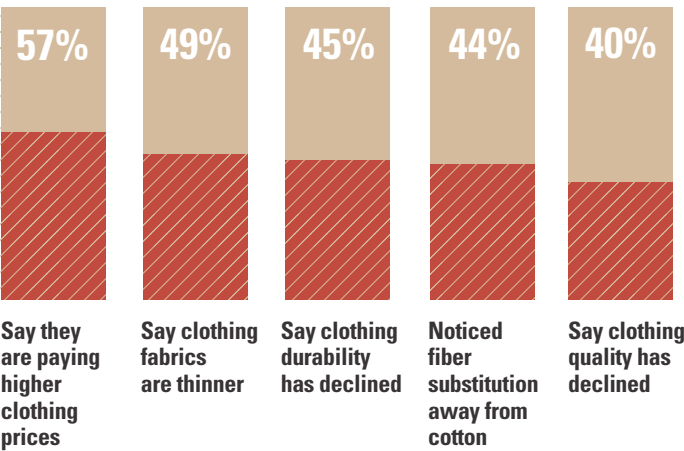
IMPORTANCE OF QUALITY

Over 9 out of 10 British consumers indicate that clothing quality strongly impacts their decision to purchase.

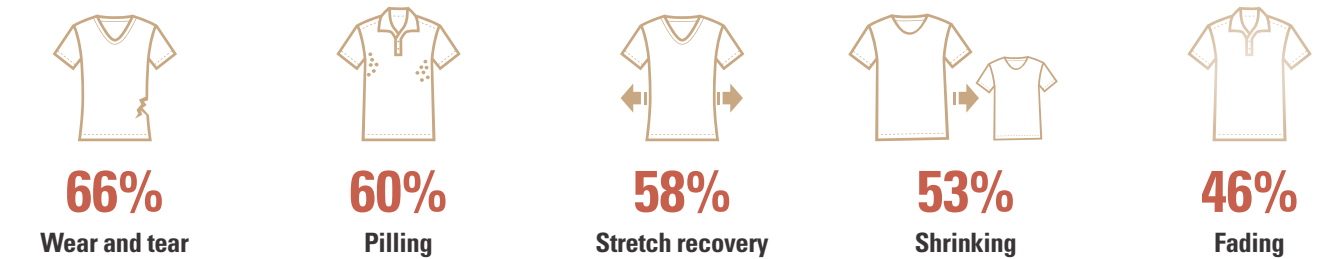


CONSUMER ASSESSMENT OF CLOTHING OFFERED AT RETAIL

Noted declines in British consumers' clothes shopping frequency and impulse purchasing may be due to a gap between shopper quality expectations and experiences with clothing purchases.

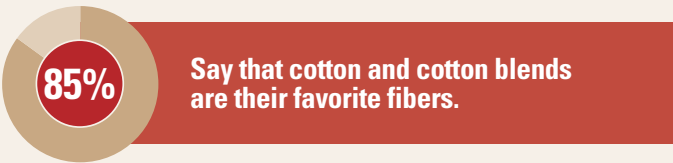


WHAT ARE THE TOP ISSUES CONSUMERS ARE EXPERIENCING WITH THEIR CLOTHING PURCHASES?



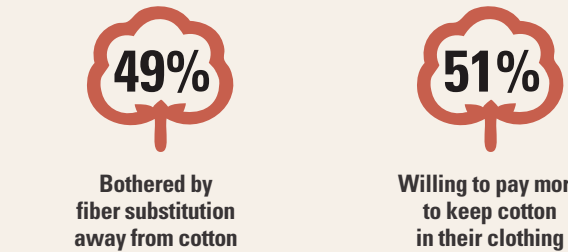
COTTON MEETS CONSUMERS' EXPECTATIONS

The vast majority of UK shoppers (85%) describe cotton as good quality.



REACTION TO FIBER SUBSTITUTION

Consumers have taken notice that other fibers have been substituted for cotton in clothing and half of UK consumers say they are willing to pay more to keep cotton in their clothing.



CUSTOMER REVIEW OF WOMEN'S DENIM JEANS

