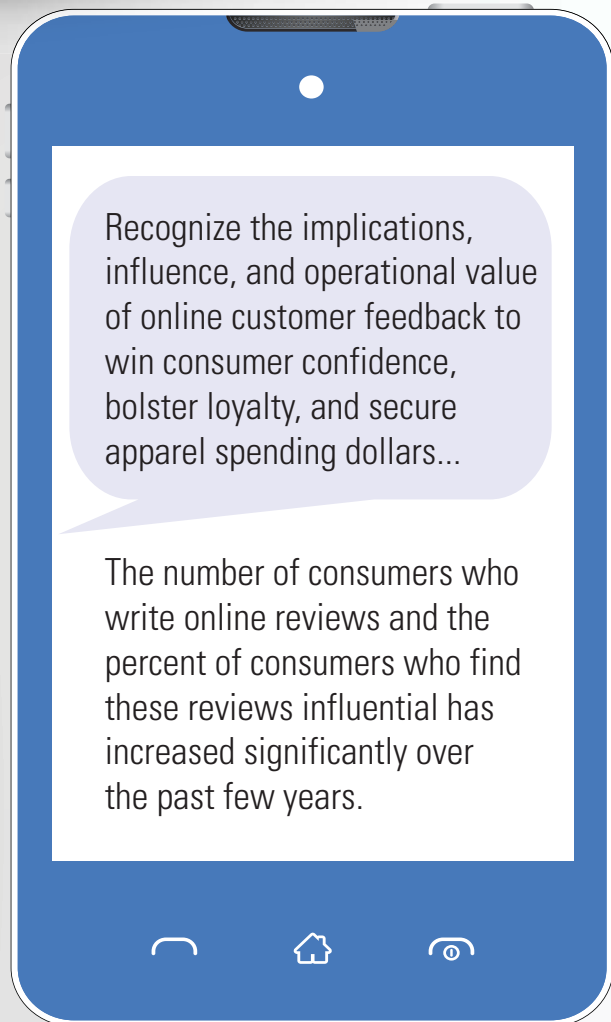
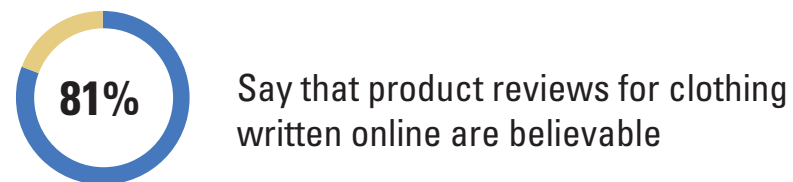
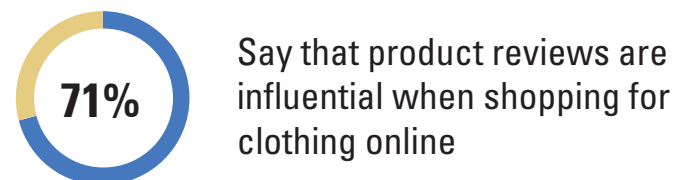
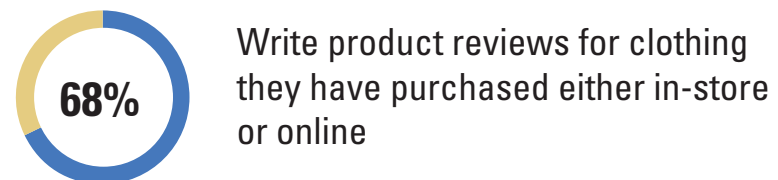


RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING

THE POWER OF CONSUMER FEEDBACK



Places where consumers read apparel reviews online:



INSIGHTS



RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING

The boundary between in-store and online apparel shopping is vanishing in the minds of consumers.

Offering a *seamless* or "OMNI-CHANNEL" shopping experience across all avenues that consumers buy and browse for clothing can help protect a retailer's or brand's competitive advantage.



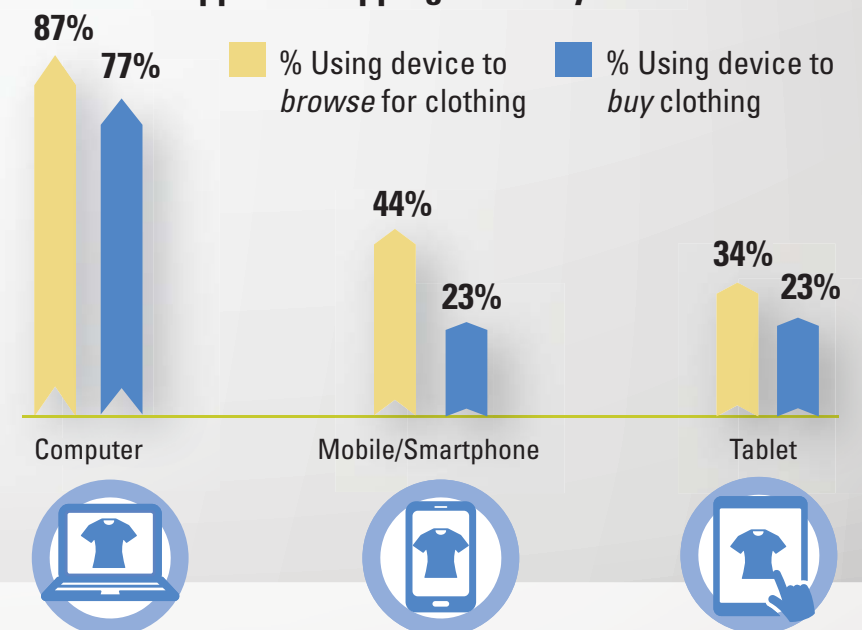
U.S. APPAREL SHOPPERS

use the Internet to...
Compare prices (**77%**)



ONLINE APPAREL SHOPPING BEHAVIORS

Apparel shopping habits by device



The use of online and mobile devices has transformed the consumer's apparel shopping experience.

Developing unified retail strategies and offerings on website, mobile, and email/social media channels can enrich the consumer online and in-store clothes shopping experience and make purchasing easier and more frequent.

Look for additional reports on Cotton Incorporated's groundbreaking Customer Comments research for intelligence on apparel issues and tactical recommendations.

- Sources:
- Cotton Incorporated's Lifestyle Monitor™ survey
 - Cotton Incorporated's Customer Comments Research
 - Forrester Research¹

Cotton Incorporated's analysis of nearly 200,000 customer reviews of apparel items has uncovered significant opportunities to address fit and performance challenges.

Customer Review (Apparel Specialty Store, Posted January 2013)

PRODUCT: Women's Denim Jeans

FIBER CONTENT: 72% Cotton/13% Polyester/13% Rayon/2% Spandex

I am very disappointed in these jeans. For \$99 I thought I was going to get jeans I would fall in love with. They stretch out and are baggy so quickly. The waist also stretches so much, I have to constantly pull them up. The back of the waist dips down so low, you need to wear a long top so underwear does not show when you bend over. After washing, the hem rolls up and even after pressing it down, it still rolls. I will be very hesitant to buy jeans from [this retailer] again.



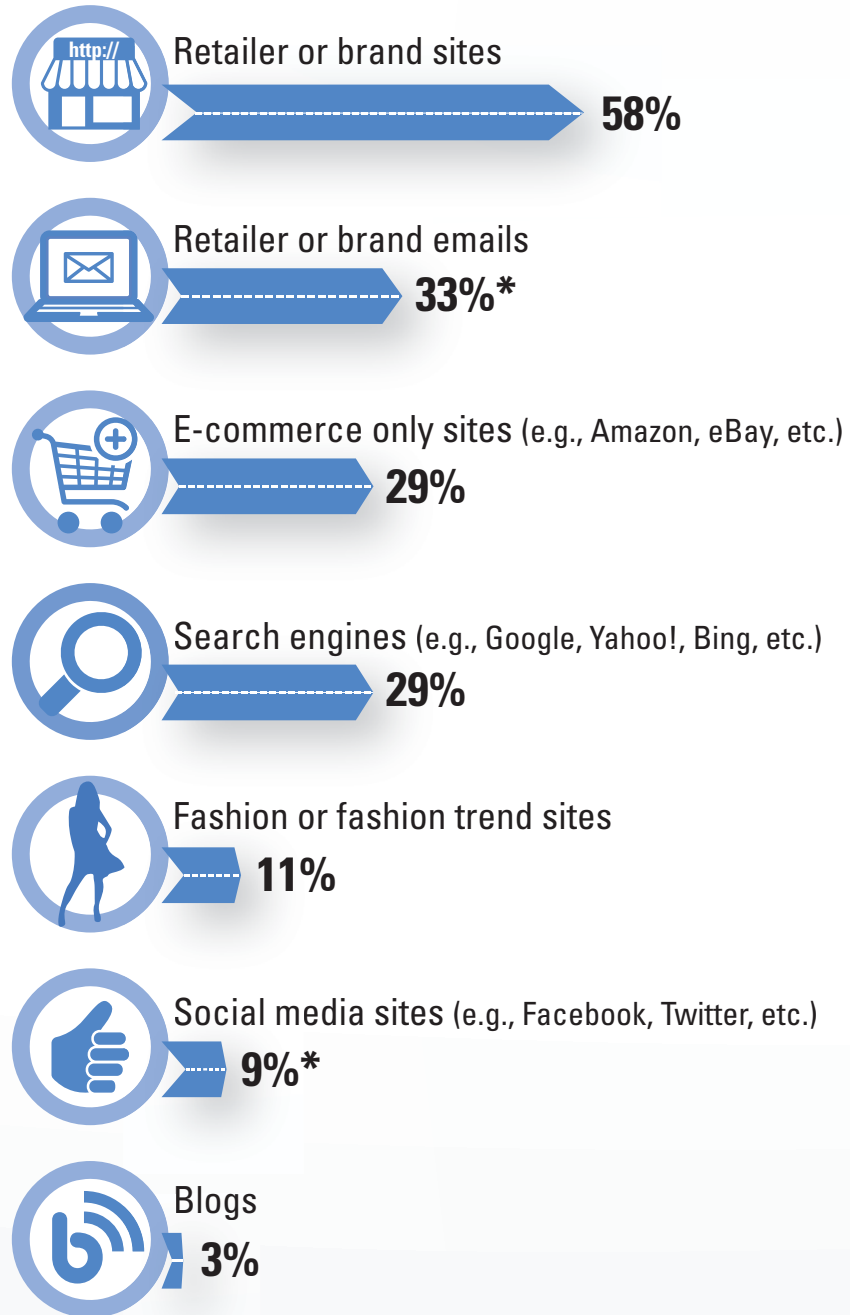
RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING

RETAIL EVERYWHERE: OMNI-CHANNEL APPAREL SHOPPING

ONLINE APPAREL SHOPPING BEHAVIORS (cont.)



Where do consumers start shopping for clothing online?

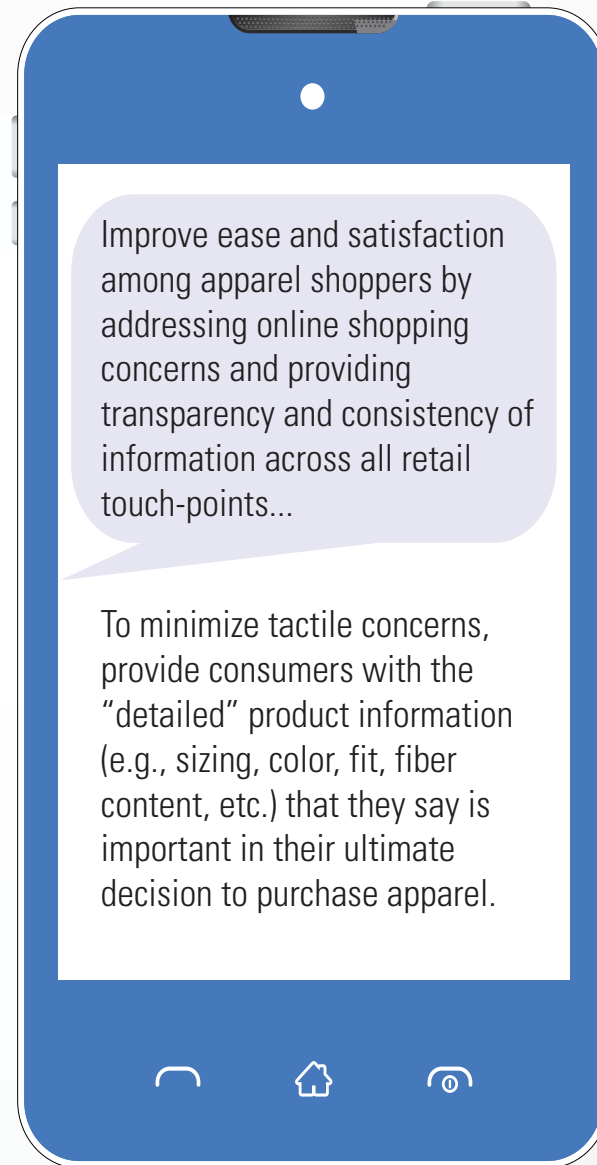


RETAILER AND BRAND LOYALTY

More than **3** out of **4** consumers tend to shop at brands and retailers they know and trust, when shopping for clothes online.



ONLINE SHOPPING CONCERNS AND CONSIDERATIONS



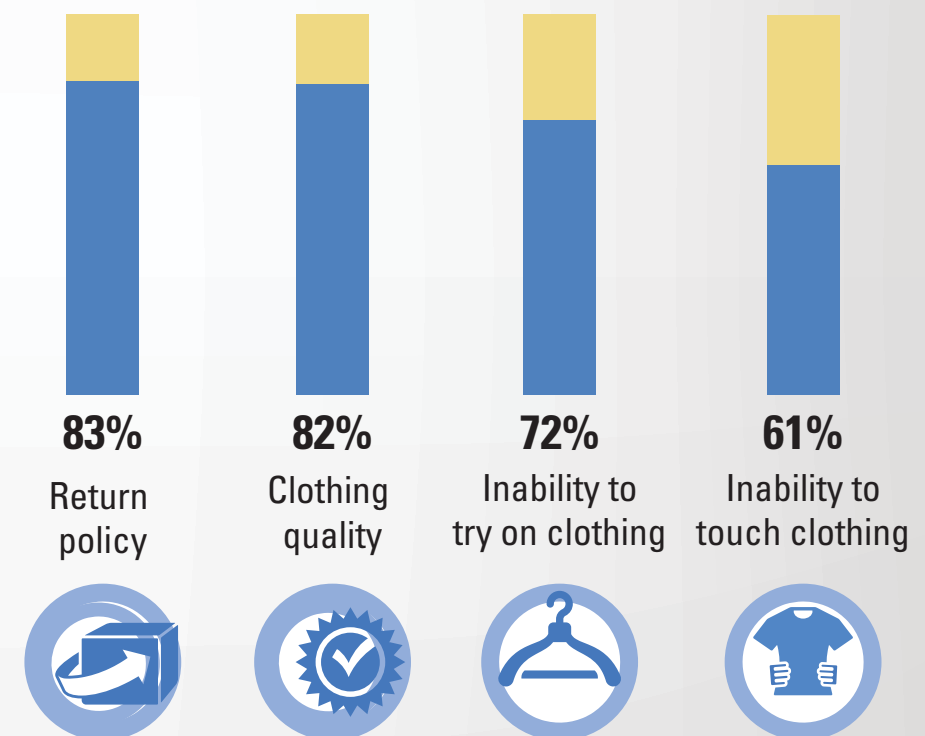
Top concerns when shopping online for clothing



More than **8** out of **10** consumers are very or somewhat concerned about shipping costs, return policies, and clothing quality when shopping online.

Tactile concerns continue to hamper online sales

% of consumers who say they are concerned about the following issues when shopping for clothes online:



FACTORS INFLUENCING ONLINE PURCHASES

Consumers say that these informational details are influential in their ultimate decision to purchase an item of clothing online:

