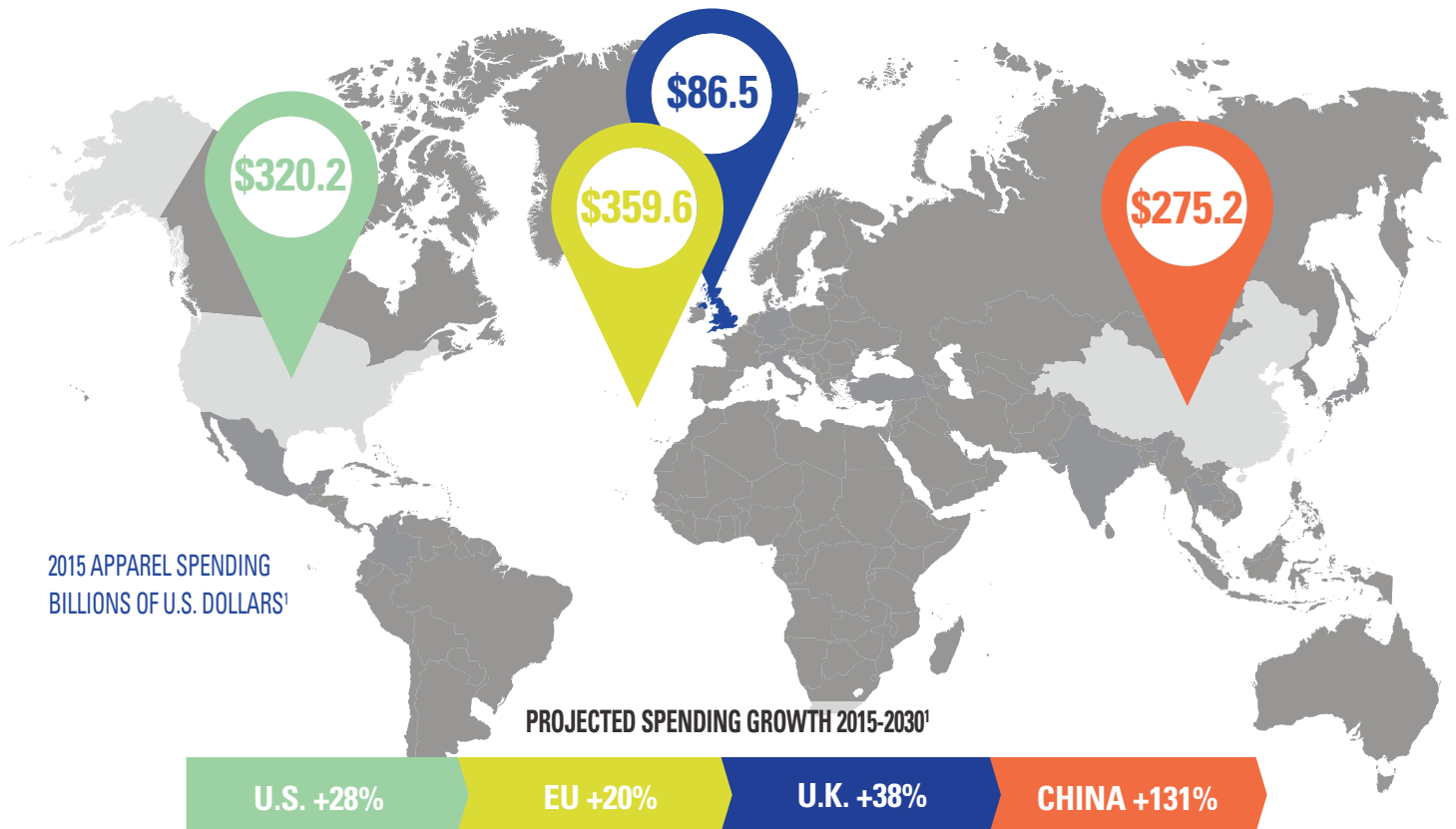


GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: UNITED KINGDOM



APPAREL SPENDING



KEY TRENDS



SPENDING

UK apparel spending is projected to grow at one of the fastest rates of any developed market over the next 15 years due to strong economic growth.



SHOPPING

Realizing the strong potential in apparel spending growth will require brands to incentivize UK consumers to break from their pragmatic habits.



OMNICHANNEL

Cultivating omnichannel or online spending in the UK may require brands to reach for customers beyond their dedicated websites.



SUSTAINABILITY

Highlighting the sustainable benefits of cotton could aid brands in their quest to market environmental friendliness to UK shoppers.

GLOBAL LIFESTYLE MONITOR: UNITED KINGDOM

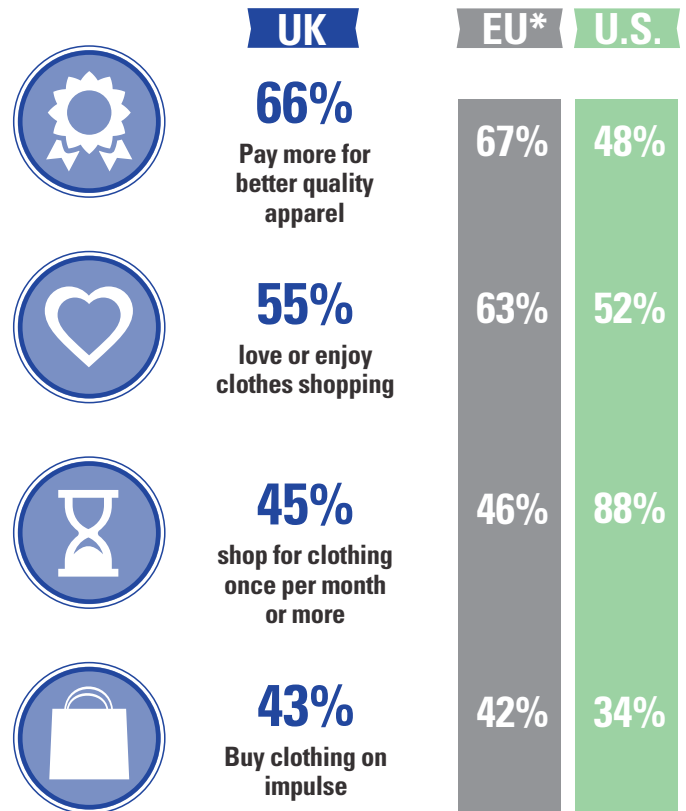
APPAREL SHOPPING ATTITUDES & HABITS

Along with shoppers in Europe and the U.S., UK consumers have reduced their shopping frequency, become less impulsive, and are shopping at lower-priced retail channels over the past fifteen years. Realizing the strong potential in apparel spending growth will require brands to incentivize UK consumers to break from the pragmatic habits through higher quality offerings and seamless shopping journeys.

TOP SOURCES OF CLOTHING IDEAS



APPAREL SHOPPING HABITS



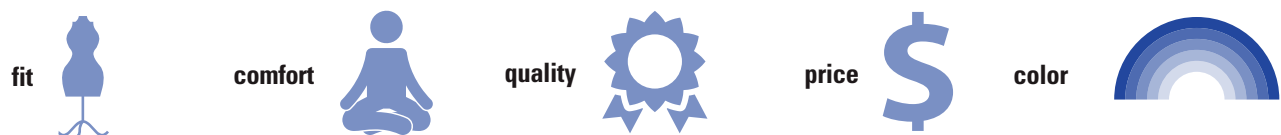
* INCLUDES FIGURES FOR U.K., GERMANY & ITALY

RETAIL CHANNELS SHOPPED MOST OFTEN

	UK	EU*	U.S.
CHAIN STORES	23%	24%	23%
ONLINE	16%	15%	7%
OFF-PRICE STORES	15%	8%	9%
DEPARTMENT STORES	15%	11%	15%
MASS MERCHANTS	12%	4%	24%
OTHER	19%	38%	22%

7 in 10 consumers say retailer/brand websites are their top online source of clothing inspiration.

TOP 5 CLOTHING PURCHASE DRIVERS



OMNICHANNEL SHOPPING

Although overall apparel spending is projected to grow the fastest in the UK compared to other developed markets, online apparel and footwear spending in the UK is projected to grow the slowest (even though it is the largest online clothing and footwear market in Europe). UK consumers are primarily utilizing brand and retailer sites for their online inspiration and browsing needs, pointing to opportunities to enhance social, email, and blogger outreach. Cultivating omnichannel or online spending in the UK may require brands to reach for customers beyond their dedicated websites.

TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



65%

shipping costs



60%

clothing quality



56%

inability to try on
clothes



54%

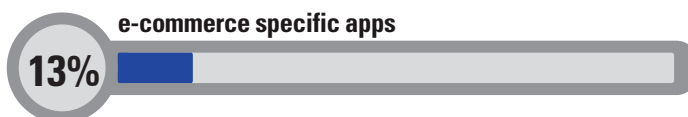
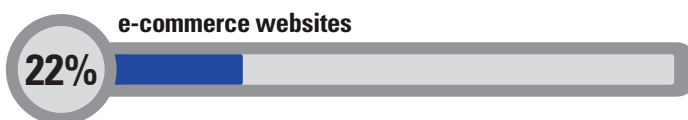
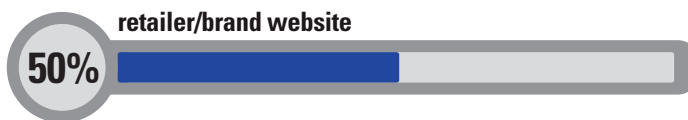
return policies



49%

inability to touch
clothes

WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

61%

up-close views

54%

detailed size information

53%

views in multiple colors

53%

customer reviews

48%

detailed fit information



Online apparel & footwear sales are projected to grow 23% from \$13.2bn in 2015 to \$16.2bn by 2020¹.

USING THE INTERNET TO SHOP FOR CLOTHES



compare prices



research clothing



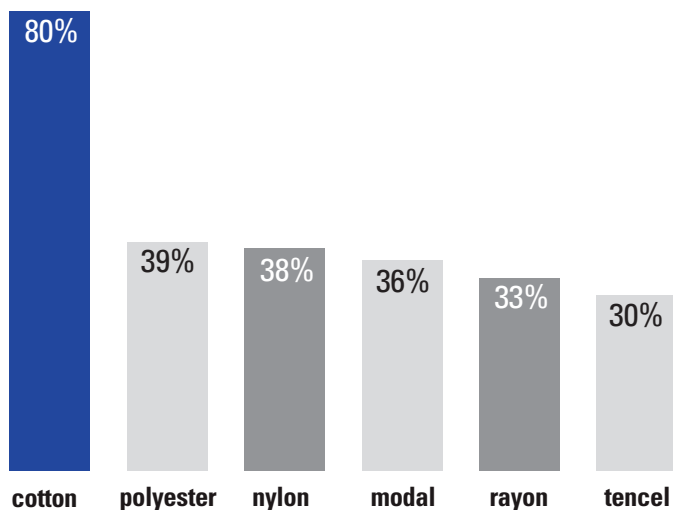
shop deals

GLOBAL LIFESTYLE MONITOR: UNITED KINGDOM

SEEKING SUSTAINABLE APPAREL

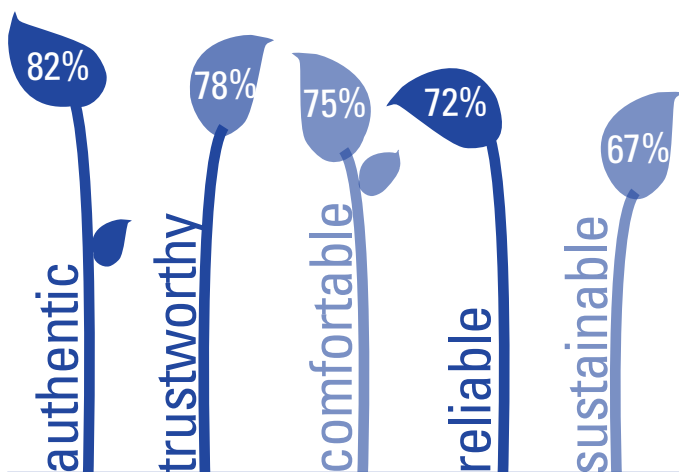
Although nearly 3 in 4 UK consumers would blame the industry for clothing produced in a non-sustainable manner, only about 1 in 4 actually seek out sustainable clothing for themselves. Brands interested in touting their sustainable advancements may also want to tout their commitment to cotton, the fiber that is viewed by about 2 in 3 UK shoppers as being the most trustworthy, comfortable, reliable, and sustainable.

% SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



83% of consumers prefer cotton-rich clothing.

COMPARED TO CLOTHING FROM MANMADE FIBERS, COTTON IS VIEWED AS THE MOST...



TOP SUSTAINABILITY/SOCIAL CONCERNS



ANIMAL/PLANT
EXTINCTION



CHILD
LABOR



DEPLETION
OF NATURAL
RESOURCES



POPULATION
GROWTH

SUSTAINABILITY...

when it's lacking, I blame the industry.

73%

37%

is important in my apparel purchase.

27%

is something I seek out in my apparel.

TOP CONCERNS REGARDING COTTON PRODUCTION

1. Amount of chemicals & pesticides used
2. Greenhouse gas emissions
3. Amount of water used



COTTON SUSTAINABILITY FACTS

U.S. cotton farmers have reduced pesticide applications by **HALF** over the past 30 years.

Over the past two decades, U.S. cotton farmers have improved water efficiency by approximately 80%.

DISCOVER WHAT COTTON CAN DOSM at
CottonToday.CottonInc.com.



Source: Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2016 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. Cotton Incorporated's *Lifestyle Monitor*TM Survey, an ongoing consumer survey that interviews 6,000 U.S. consumers annually. External Source: Euromonitor International¹