

GLOBAL CONSUMER INSIGHTS

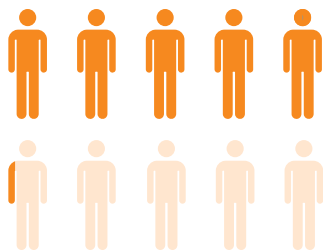
IN GERMANY

SHOPPING TRENDS

↑ = significantly higher in 2025 ↓ = significantly lower in 2025

52%

Feel very/somewhat optimistic about their financial situation



Top Retailers Shopped for Clothing

81% 
Online only store

74% 
Mass merchant
(In-Store)

63% 
Discount store
(In-Store)

Top Ways Plan to Shop for Clothing in Next Year

Top Way Plan to Shop

51%

I will buy clothing in the latest styles

71%

I will buy more comfortable clothing

68%

I will do more research so I can get the best value

63%

I will buy higher-quality, longer-lasting items

Preferred Shopping Method

Browsing Purchasing

62%

35%

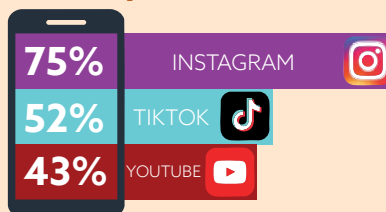
61%

36%

Online

In-Store

Top Social Media Sources



51% ↑

Use social media as a top source of inspiration
(social media/blogs/vlogs)

Drivers of Consumer Preference



Quality



Comfort



Fit

Comfortable ↑



69%

Soft ↑



65%

Authentic ↑



62%



Cotton



Denim



Cotton blends

82%

Prefer Cotton, Cotton blends, or Denim



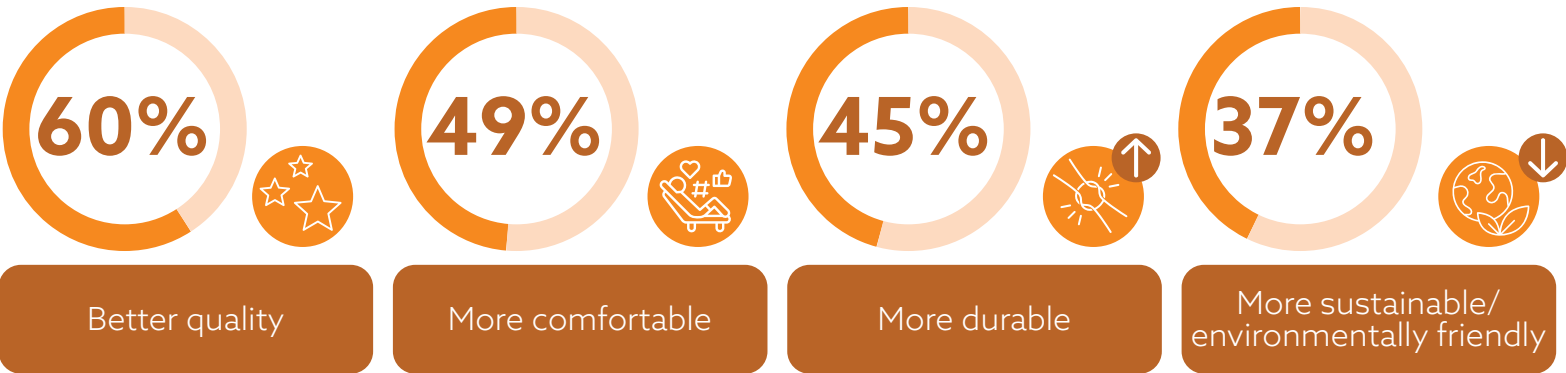
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Source: Cotton Council International and Cotton Incorporated's Global Lifestyle Monitor™ survey, conducted with n=1,003 consumers in Germany

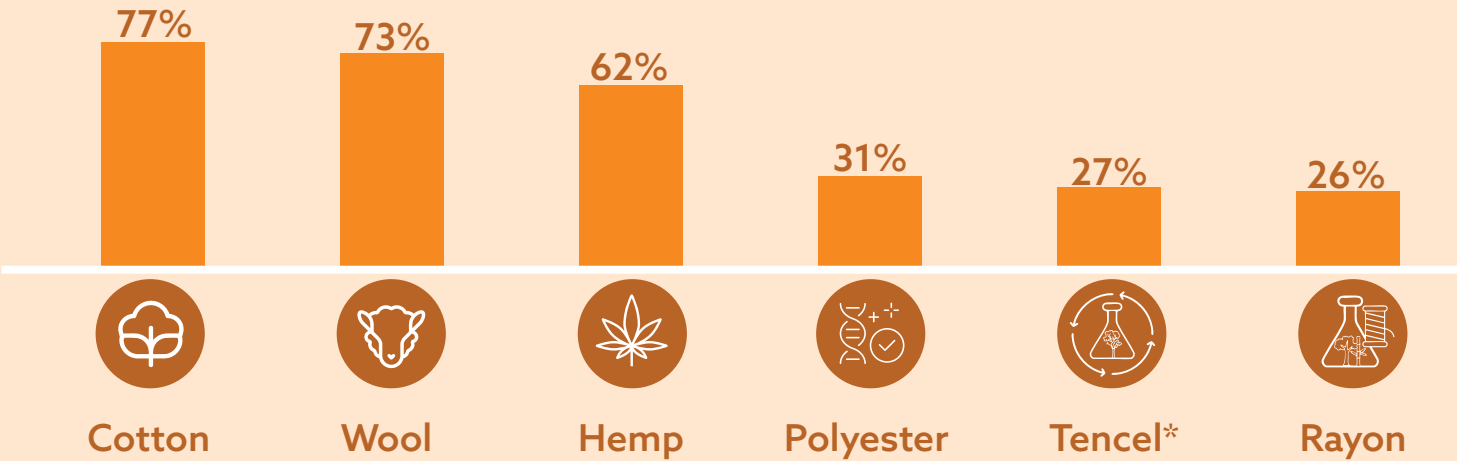
SUSTAINABILITY ↑ = significantly higher in 2025 ↓ = significantly lower in 2025



Top Reasons Would Pay More for Clothes Made from Natural Fibers



% Say Is Safe for the Environment (Top 5 of 11)



*Tencel is a trademark of Lenzing