

Cotton Incorporated

Sustainability's Impact on Global Consumers

Presented by:



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Sustainability's Impact on Global Consumers

-  **CONSUMER CONCERN**
-  **ACTIONS TAKEN**
-  **PURCHASE EFFECT**
-  **CUES USED**
-  **CONSUMER OUTREACH**

Consumers' Shopping Preferences



CLOTHES

35%



GROCERIES

19%



ELECTRONICS

15%



SHOES

10%



COSMETICS

8%

Source: CCI & Cotton Incorporated's Global Lifestyle Monitor and Cotton Incorporated's *Lifestyle Monitor*™ Survey 2018



Research Methodology

OVER 7,000 INTERVIEWS CONDUCTED

Funded by CCI & Cotton Incorporated



U.S.
1,029



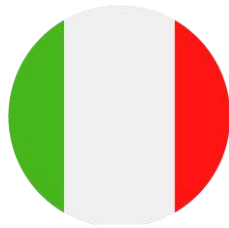
U.K.
1,047



India
1,034



Germany
1,070



Italy
1,078



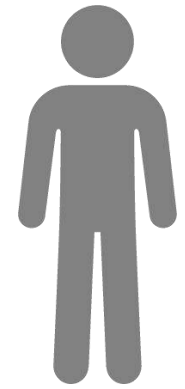
China
1,041



Mexico
1,066



50%



50%

The Consumer

MOST IMPORTANT PURCHASE DRIVERS WHEN SHOPPING FOR CLOTHES



PRIMARY

quality | fit |
comfort |
durability | price |
clothing material



SECONDARY

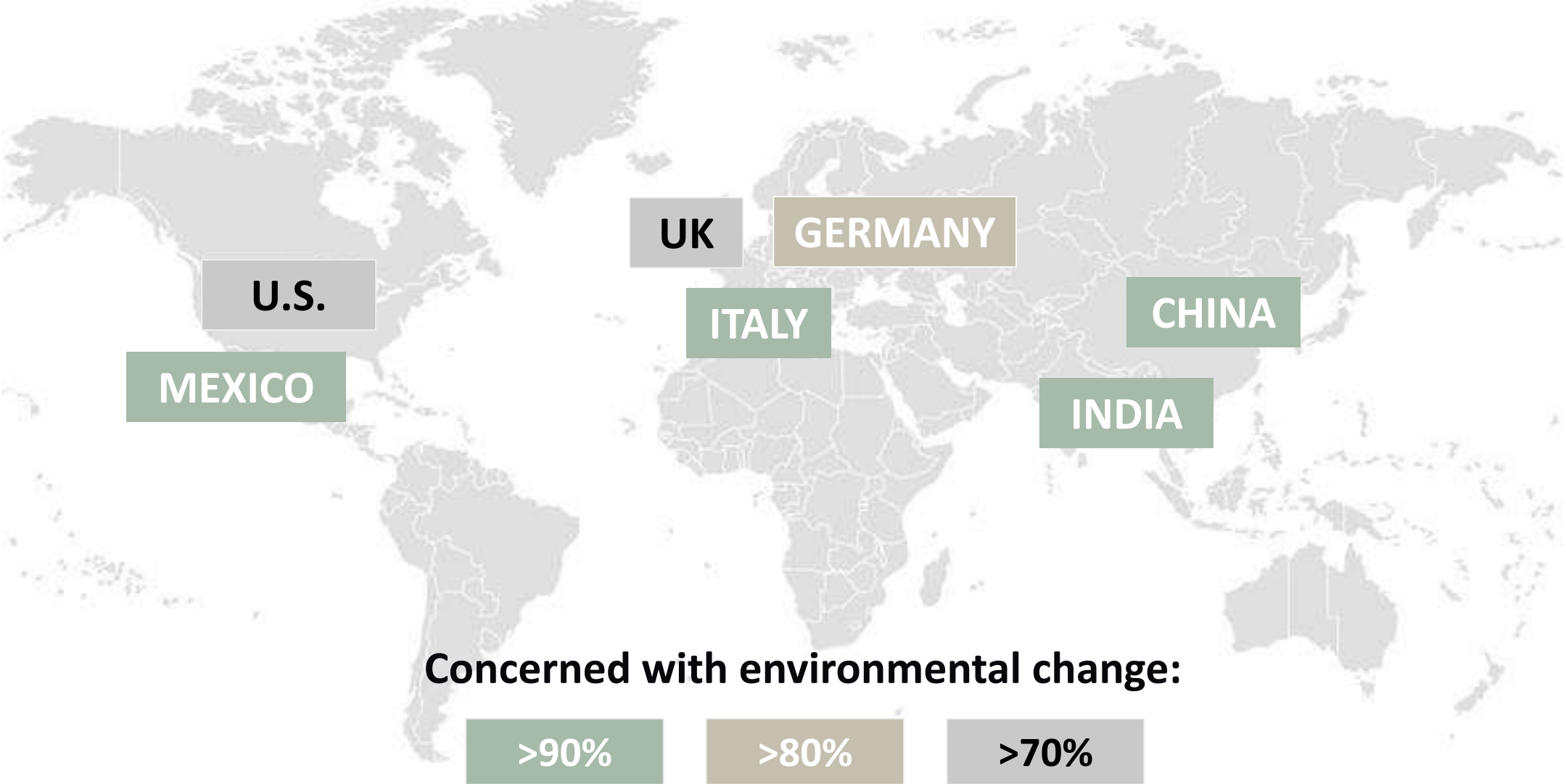
style | softness | color
| performance features
| sustainability |
laundering instructions



OTHER

country of origin |
brand name

Global Concern for Sustainability



Concerned with environmental change:

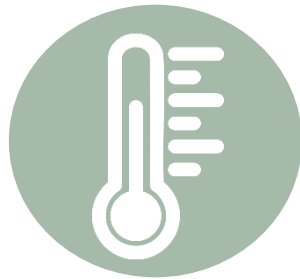


Source: CCI & Cotton Incorporated's Global Environment Research 2017



Consumer Concerns

SOCIAL/ENVIRONMENTAL CONCERNS AMONG GLOBAL CONSUMERS



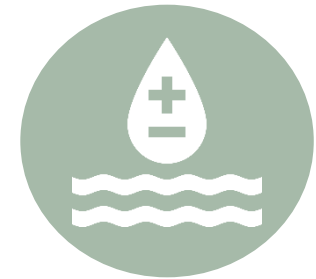
CLIMATE
CHANGE



AIR
POLLUTION



WATER
SCARCITY



WATER
QUALITY



DEPLETION
NATURAL RESOURCE



FOOD
SAFETY



POPULATION
GROWTH

Source: CCI & Cotton Incorporated's Global Environment Research 2017

Consumer Concerns by Age

SOCIAL/ENVIRONMENTAL CONCERNS

	<35	35+
Climate Change	45%	43%
Air Pollution	42%	40%
Water Scarcity	39%	30%
Depletion of Natural Resources (other than water)	27%	25%
Water Quality	26%	27%

Source: CCI & Cotton Incorporated's Global Environment Research 2017



Consumer Actions

CONSUMERS' ACTIONS TO IMPROVE THE ENVIRONMENT



Recycle bottles,
cans, etc.
86%



Buy energy-saving
appliances
83%



Use refillable
water bottle
80%



Use own
grocery bags
80%



Limit water
usage
80%



Recycle
clothing/textiles
75%



Purchase local
made
73%



Reduce
consumption
70%



Buy clothing made
from sustainable
materials
62%

Source: CCI & Cotton Incorporated's Global Environment Research 2017



Consumer Actions by Age

SOCIAL/ENVIRONMENTAL CONCERNS GLOBALLY

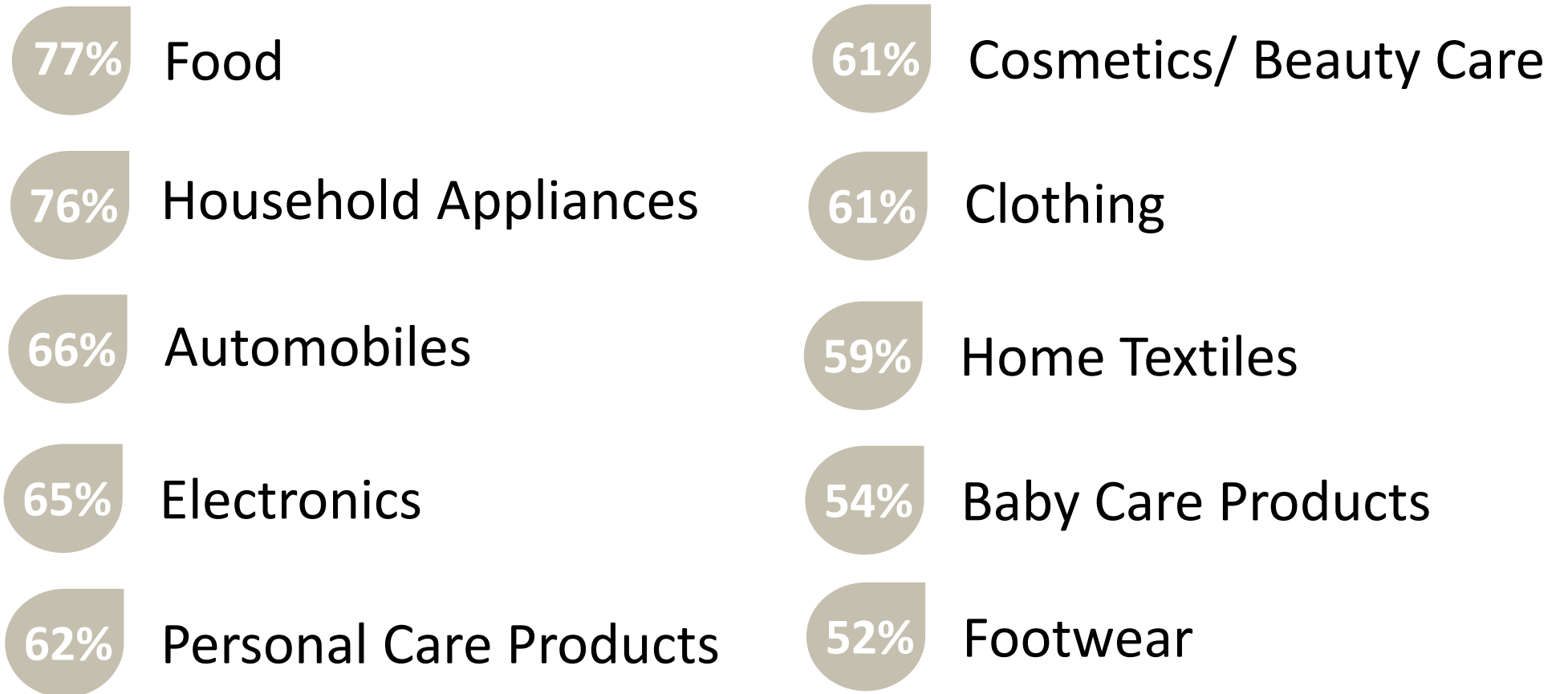
	>35	>35
Recycle cans, bottles, etc.	83%	88%
Use refillable water bottles	82%	80%
Energy-saving appliances	80%	85%
Limit water usage	80%	81%
Use own grocery store	78%	83%
Purchase locally made	74%	74%
Recycle clothing	73%	76%

Source: CCI & Cotton Incorporated's Global Environment Research 2017



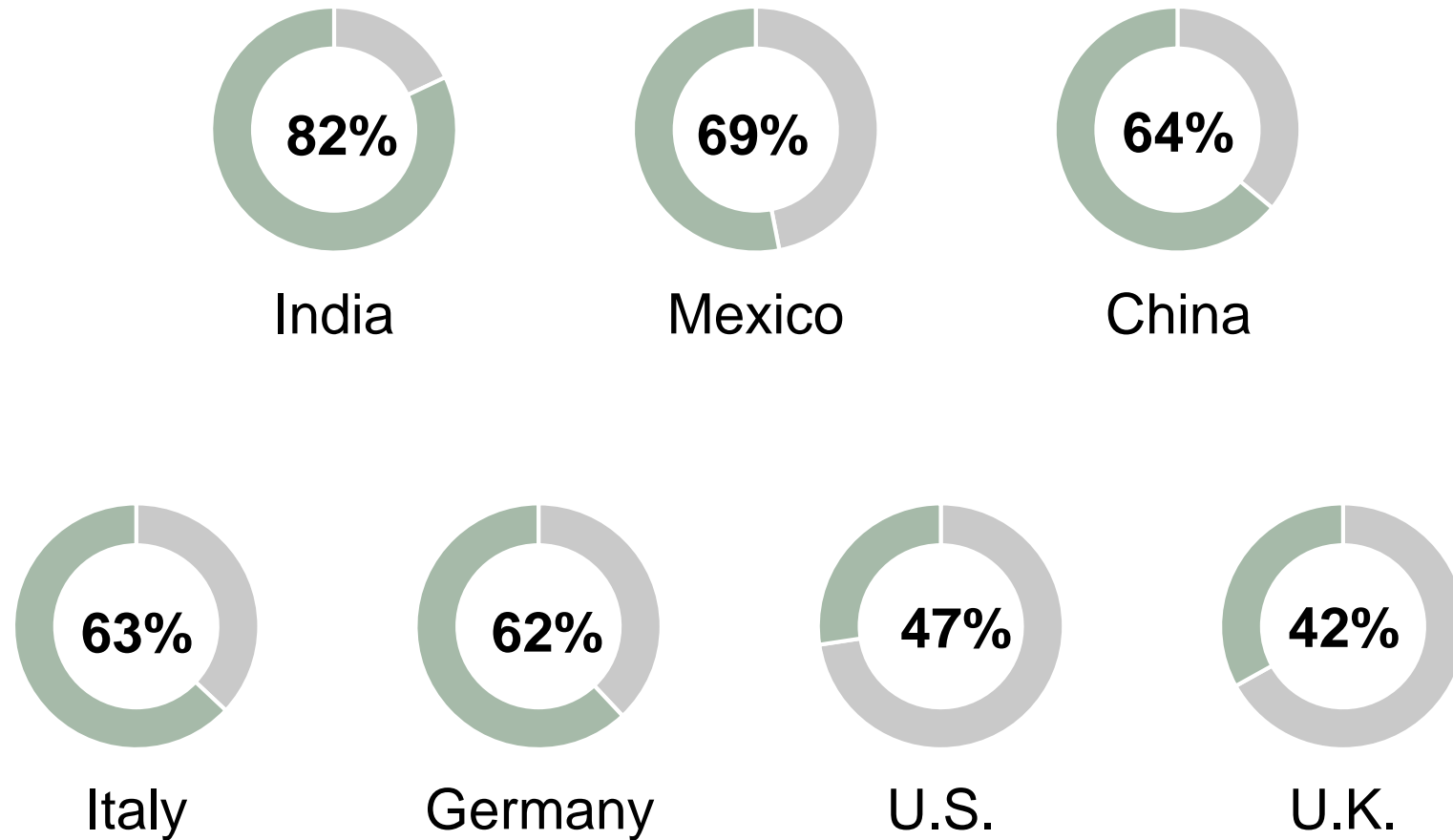


The Importance of Sustainability to a Purchase



Source: CCI & Cotton Incorporated's Global Environment Research 2017

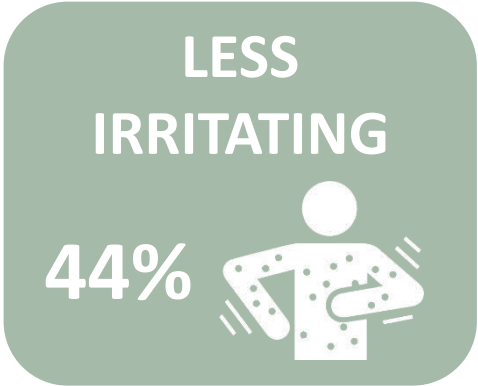
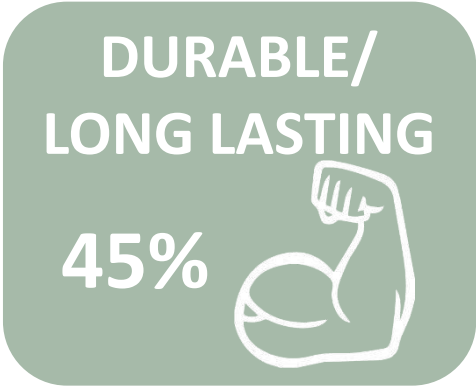
Sustainability's Influence on Clothing Purchases by Country



Source: CCI & Cotton Incorporated's Global Environment Research 2017



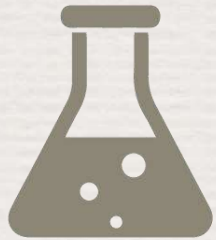
What Makes Clothing Sustainable



Source: CCI & Cotton Incorporated's Global Environment Research 2017

Top Fiber Concerns

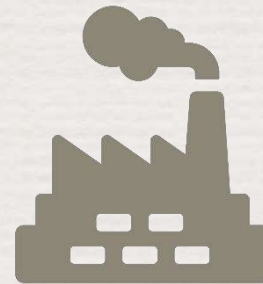
Amount of chemicals used to produce manmade fibers



Amount of pesticides used to produce cotton



Greenhouse gas emissions as a result of producing manmade fibers



Microfiber waste in the oceans from synthetic fibers

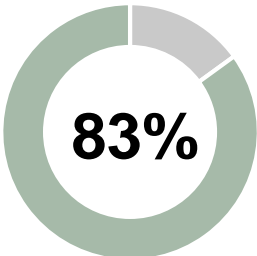


Source: CCI & Cotton Incorporated's Global Environment Research 2017

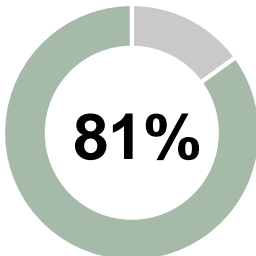


Consumers' Opinions on Fiber Safety

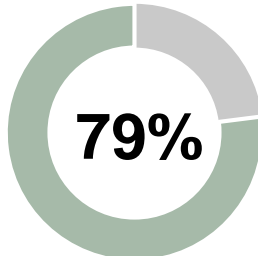
PERCENT OF GLOBAL SHOPPERS SAYING FIBERS ARE SAFE FOR THE ENVIRONMENT



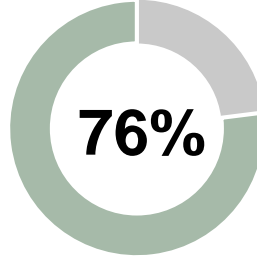
Cotton



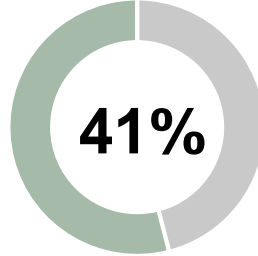
Organic Cotton



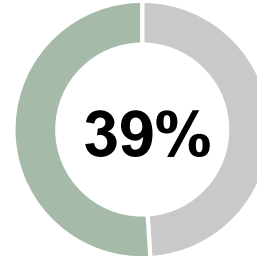
Wool



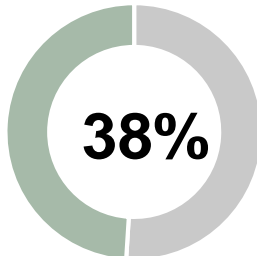
Silk



Rayon



Nylon



Polyester

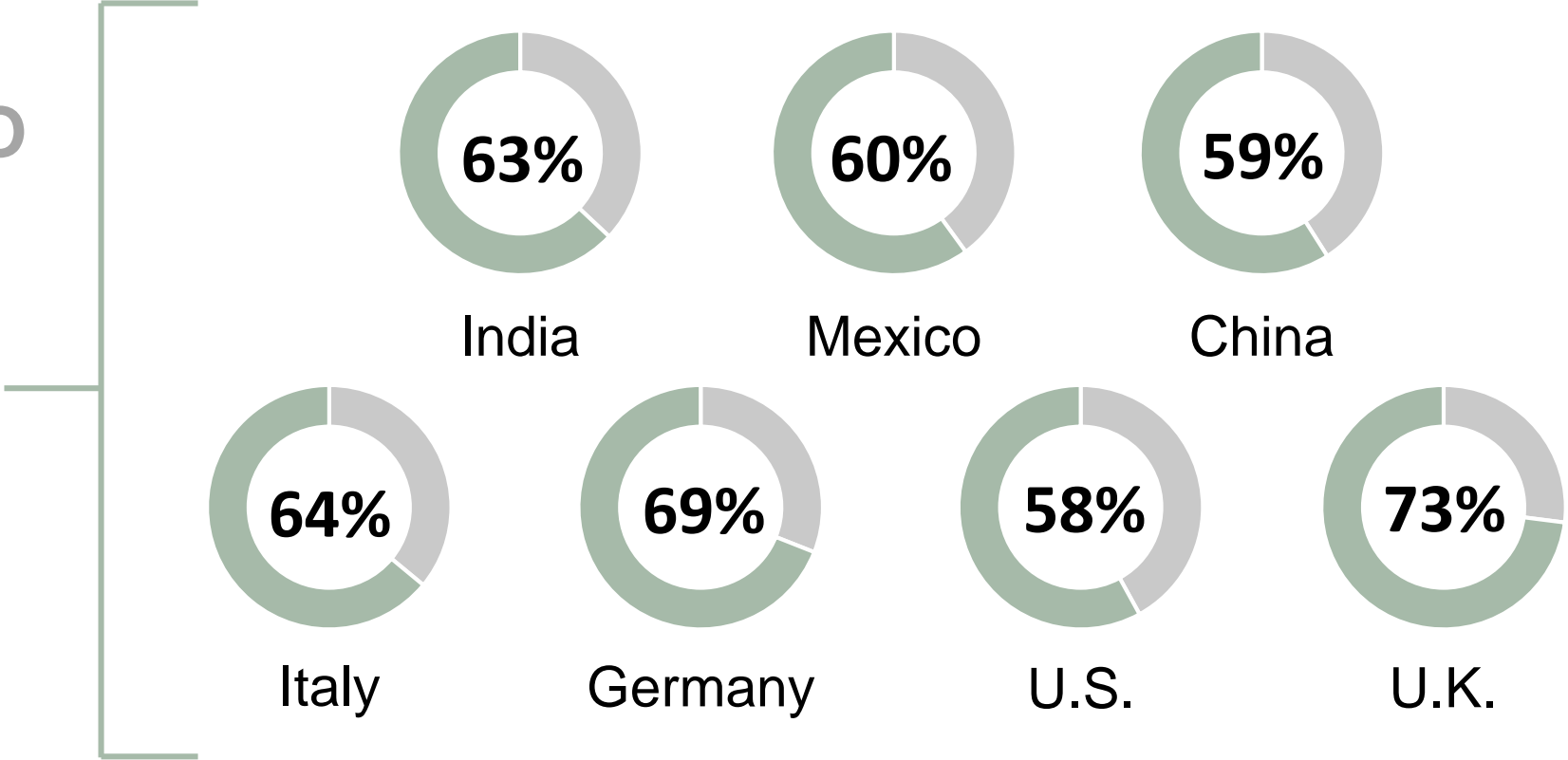
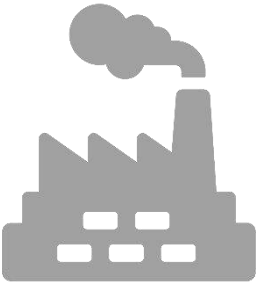
Source: CCI & Cotton Incorporated's Global Environment Research 2017



Consumer Expectations

WHO IS TO BLAME FOR NON-SUSTAINABLE APPAREL

CONSUMERS WHO
BLAME THE
INDUSTRY



Source: CCI & Cotton Incorporated's Global Lifestyle Monitor 2018



TRADE – How Sustainability Is Integrated

76% Integrated into products

71% Aligned with corporate mission statement

73% Integrated into strategic plan

64% Part of marketing/promotional platform

57% Part of corporate culture



Source: Sourcing Journal and Cotton Incorporated Sustainability Report 2018

TRADE - Main Sustainability Focus



MANUFACTURING

66%



RAW MATERIALS

63%



WORKER SAFETY

61%



GREEN BUILDING

43%



TRACEABILITY

49%

Source: Sourcing Journal and Cotton Incorporated Sustainability Report 2018



TRADE - Result of Sustainability Initiatives



INCREASE
DEMAND

69%



INCREASE
CONSUMER
AWARENESS

82%



COMPETITIVE
ADVANTAGE

82%



SOON BE THE
NORM -BE
READY

85%



INFLUENCE
INDUSTRY
CHANGE

89%

Source: Sourcing Journal and Cotton Incorporated Sustainability Report 2018



Sustainability & the Global Consumer



DRIVING THE CONSUMER PURCHASE

While not a primary purchase driver, environmental concern is growing



IDENTIFYING SUSTAINABLE CLOTHING





Consumers look to fabric as a main cue to the sustainability of a garment



EXPECTATIONS OF THE END CONSUMER

Consumers care, but expect the industry to take responsibility

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-  **CONSUMER OUTREACH**

Consumer Marketing

Cotton Keeps Making Strides Toward a Sustainable Fashion Future



LISA LO PARO



Cotton
@DiscoverCotton

Follow

It all starts with one tiny little ball of fluff.

Celebrate the #FirstDayOfSpring in cotton by shopping our spring collection here: bit.ly/2GcDfWZ



96% of consumers would prefer their jeans to be cotton rich.

sponsored by **lifestyle monitor**





BLUE JEANS GO GREEN™ DENIM RECYCLING

**MAIL-IN
PROGRAM**

**CONSUMER RETAIL
PARTNERSHIPS**

**EDUCATION
INITIATIVES**

**CORPORATE SOCIAL
RESPONSIBILITY**

**OTHER
ACTIVITIES**



RECYCLE YOUR OLD DENIM
AT MADEWELL AND GET \$20
OFF A NEW PAIR.

Madewell



Milestones & Achievements

2,000,000+

pieces of denim
collected

1,000+ TONS

of textile waste
diverted from landfills

4,000,000+

square feet of
insulation upcycled
from worn denim

35+

Habitat for Humanity
affiliates have received
denim insulation

15+ GRANTS

of denim insulation fulfilled
through the program



**BLUE JEANS
GO GREEN**
DENIM RECYCLING



Building Awareness



Wear what's natural. Do something that isn't.
LEAVE COMFORT TO CLOTHES



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Advertising Banners

**YOU
EAT
CLEAN**



**BUT DO YOU
DRESS
CLEAN?**




**WEAR
NATURAL FABRIC
YOU CAN FEEL
GOOD ABOUT**



**KNOW THE
TRUTH ▶**

Sustainability – Speaking Directly to Consumers – Blog



OUR PROGRAMS LEARN ABOUT COTTON COTTON DIY BLOG SHOP COTTON

Home / Blog / Choose the Natural Choice: Cotton

Choose the Natural Choice: Cotton

LISA LO PARO
April 26, 2018

We all know the importance of staying fit, eating healthy, buying smart. We make sure to read the ingredients list of the food we buy, to make sure there aren't any additives, chemicals, or potentially harmful substances. When we buy face wash or makeup, we check the label to make sure the stuff we're putting on our skin is natural, healthy, and worth our money. But do we give enough thought to something else we're putting on our bodies?

Chances are you forget to check the fiber content label when you're out shopping for clothes. Maybe you only notice the softness of the fabric, how it drapes, and of course, how well it fits. But next time you're on the hunt for the perfect pair of jeans or a fabulous new dress, check the label for cotton. When you find it, you're that much closer to living a more natural life.

Cotton Is Natural, Unlike Polyester, Rayon, and Other Synthetic Fibers

That cotton comes from a plant will come as a shock to no one, but it's this very simple fact that makes cotton so special. Cotton is grown on farms, not created in a lab through heavy chemical processing. Cotton has many natural benefits compared to synthetic fabrics, benefits like breathability, softness, ease of care, versatility, and strength. There's almost nothing that cotton can't do.

We may be biased, but we can't seem to stop ourselves from touting the benefits of cotton. Unlike synthetics, cotton breathes, meaning your favorite summertime fabric is keeping you cool. Cotton's breathability also makes it the perfect choice for your intimates, preventing bacteria

OUR PROGRAMS LEARN ABOUT COTTON COTTON DIY BLOG SHOP COTTON

Home / Blog / Cotton Keeps Making Strides Toward a Sustainable Fashion Future

Cotton Keeps Making Strides Toward a Sustainable Fashion Future

LISA LO PARO
September 10, 2017

Fast fashion: we all know the term. Fast fashion makes sure our closets are always well stocked with the latest and greatest trends. Most of us expect to see new clothes in our favorite stores about once a month, and we're appropriately disappointed when we can't indulge our shopping urge. Fast fashion has transformed the way we shop, what we buy, and how long we keep our clothes. But it's hardly sustainable. Is it?

When it comes to fast fashion, ingredients matter. Did you know that there are currently 21.3 million tons of polyester fabric in stores? That's not to mention what we've bought already, and all the polyester still to be made. Polyester, and other popular synthetics like rayon, is cheap to make, but it doesn't biodegrade like cotton does, meaning a nightmare for landfills—and for our environment.

In fact, there's a ton of research that states that synthetic fibers cause a lot of environmental headaches. Polyester is a plastic, and washing it causes tiny particles of plastic to [enter our waterways](#). This microplastic pollution is becoming a huge problem for marine life. Rayon takes a lot of chemicals to process, and its manufacture contributes to the widespread deforestation problem around the globe.

So what's a fashionista to do? Certainly, the answer isn't to stop shopping. But cotton may have your answer.




Sustainability – Speaking Directly to Consumers - Twitter



Cotton @DiscoverCotton

You don't have to compromise your style when shopping sustainable.

Check out these tips to stay styling and eco-friendly! We're particularly a fan of #3 😊



5 ways to master sustainable fashion without compromising on style, by Reb...
The celebrity stylist tells us the easiest ways to shop ethically but stylishly, ahead of Earth Day this weekend
harpersbazaar.com

11:50 AM - 22 May 2018

4 Likes

Cotton @DiscoverCotton

Cotton is a drought-resistant crop. In fact, most of U.S. cotton is grown using rainfall alone. #EarthDay #ShopCotton



4:00 PM - 22 Apr 2018

4 Retweets 16 Likes

Cotton @DiscoverCotton

The entire cotton plant can be used and repurposed, not just the fluff. Cottonseed can be used as a natural ingredient in cosmetics and skincare, while the seeds, leaves, and stems can be used for mulch. #EarthDay #ShopCotton



3:00 PM - 22 Apr 2018

10 Retweets 28 Likes

Cotton @DiscoverCotton

U.S. cotton farmers have made efficiencies to use less land: they now grow almost twice the cotton on the same amount of land as they did 30 years ago! #EarthDay #ShopCotton



1:00 PM - 22 Apr 2018

5 Retweets 14 Likes



Sustainability – Speaking Directly to Consumers - Facebook



Sustainability | Cotton

 **Cotton** about a year ago · 🌐

Did you know cotton isn't just a fabric? Cotton is also used for its cooking oil, and can be made into money or housing insulation! Learn how sustainable cotton truly is this #EarthDay with Damsel In Dior.

   290

148 Shares 411K Views

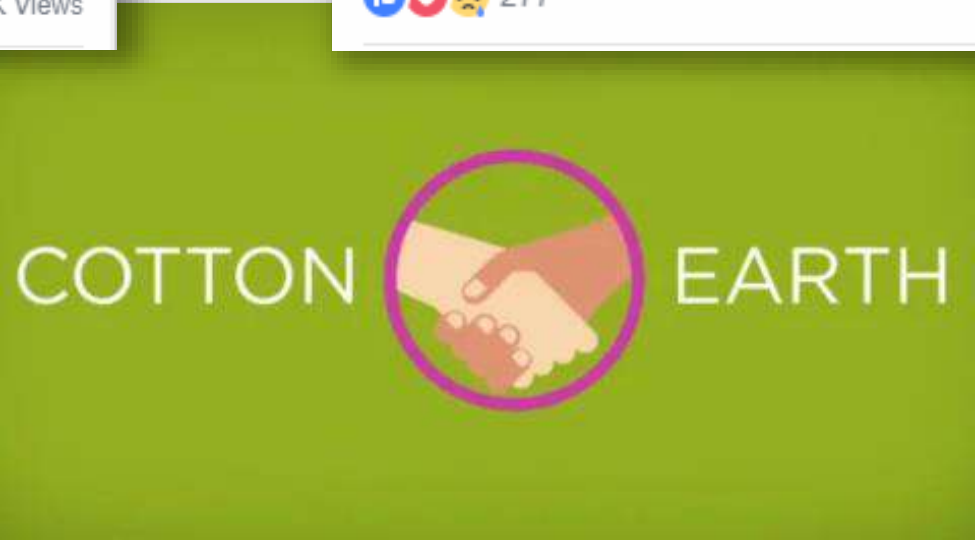
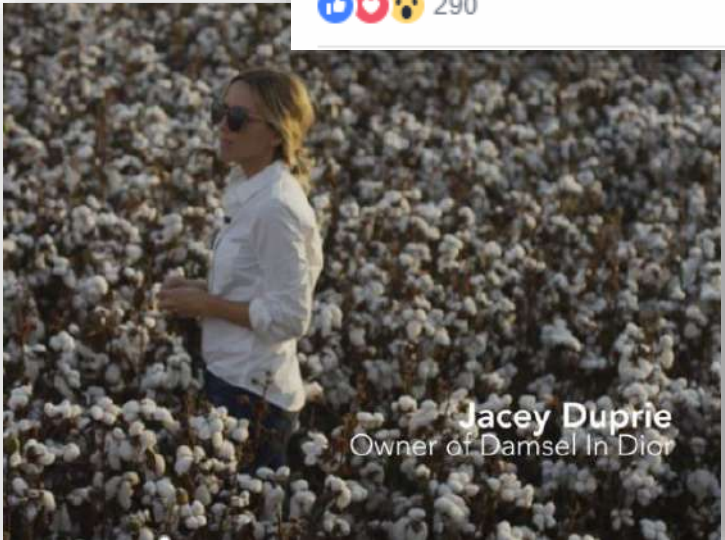
Cotton and the Planet

 **Cotton** about 2 years ago · 🌐

Learn more about the environmental gains achieved by U.S. cotton producers. Happy #EarthDay !

   277

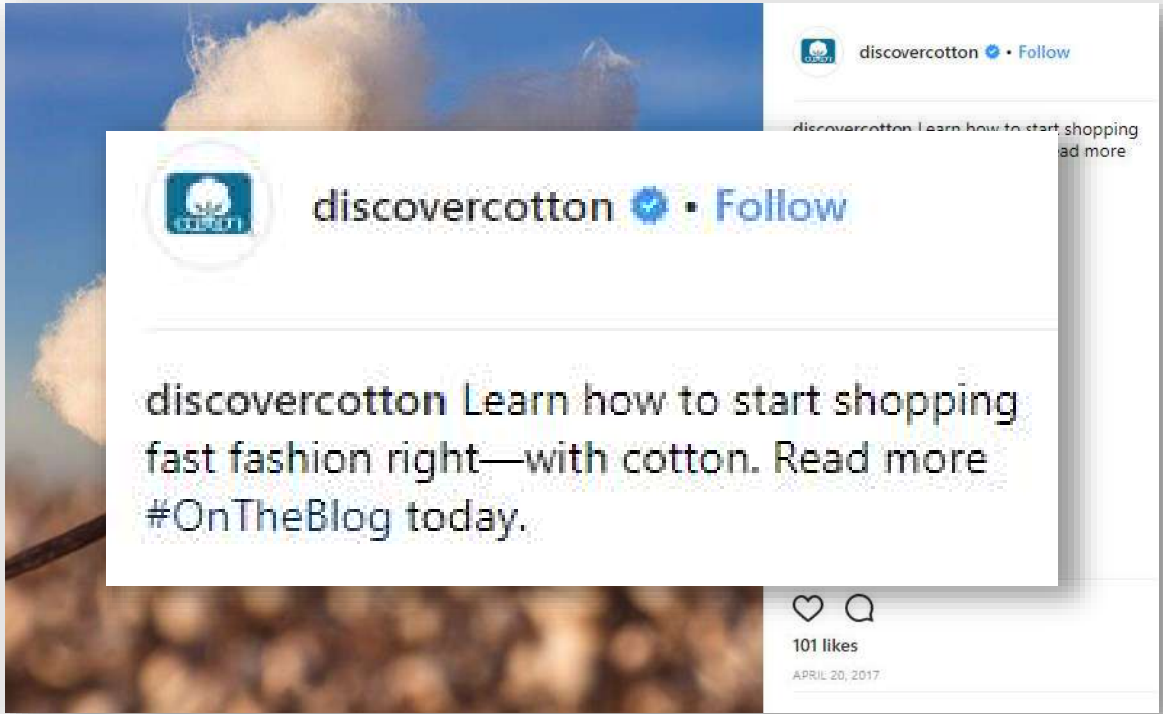
73 Shares 93K Views



Discover Cotton and Its Water Use



Sustainability – Speaking Directly to Consumers - Instagram



Consumer Outreach



MUST BE RELEVANT TO CONSUMERS

Messaging must resonate with consumers; not just industry speak



APPROACH TO SUSTAINABILITY BY CONSUMERS

Most consumers believe that sustainability is important, but it must balance with fashion, convenience and price



THIS IS A JOURNEY FOR ALL

These issues impact everyone in the textile industry; improvements benefit all

Cotton Incorporated
consumer websites

TheFabricOfOurLives.com
destination for all things cotton including care tips, DIY,
fashion advice & shop cotton

BlueJeansGoGreen.org
program to recycle worn denim into insulation & to
help with community building efforts

CottonToday.CottonInc.com
resource for information on sustainability

social media

YouTube.com/CottonFabricOfMyLife
video library of commercials & related content

Facebook.com/Cotton
latest fashion & lifestyle news from Cotton

Twitter.com/DiscoverCotton
real-time conversations from fashion to function

Instagram.com/DiscoverCotton
curated cotton & fashion photography

Pinterest.com/DiscoverCotton
cotton apparel collections, care tips & DIY



Cotton Incorporated
trade websites

CottonInc.com
all about Cotton Incorporated, where it came from &
what it is doing

CottonCultivated.CottonInc.com
your destination for agricultural resources

CottonWorks.com
the ultimate textile resource with an extensive learning
center & new business center

LifestyleMonitor.CottonInc.com
reporting on global attitudes & behaviors

RBTN.CottonInc.com
Regional Breeders Testing Network refers to a trial
conducted by a group of cotton breeders & scientists
for evaluating elite germplasm

TrendForecast.CottonInc.com
offers insight into seasonal, denim & active trends, with
direction for color, fabric & styling

WholeCottonseed.com
a valuable end-product of cotton & excellent feed
ingredient for cattle





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