

# INSIGHTS

## APPAREL FEATURES: GLOBAL ATTITUDES



Consumers around the world seek products that add value to their lives—including apparel with features that provide functionality beyond visual and textural appeal. To understand this growing market, the 2008 Global Lifestyle Monitor surveyed consumers in ten countries to gauge awareness of and interest in apparel features. The results reveal a worldwide interest in low-maintenance apparel, with awareness of specific features differing among countries. Wrinkle resistance and easy care consistently ranked high in both awareness and perceived value among global consumers, who also showed a consistent preference for natural fibers, such as cotton. The natural properties of cotton are enhanced by an increasing array of textile technologies, positioning cotton as an important component of the growing market for apparel with functional features.

### NATURAL FIBERS PERFORM

Regardless of which features global consumers want in their clothing, over half consider natural fiber content to be an important factor in their purchase decisions. In fact, over half (54%) of global consumers agree that clothes made of 100% natural fiber are of higher quality than synthetics, up 5 percentage points from 2003. A clear majority of consumers (64%) are willing to pay more for clothing made of natural fibers, such as cotton or wool, than for clothing made of synthetic fibers. When respondents were asked to compare cotton and polyester, cotton emerged as the clear favorite. Globally, 92% of consumers agreed that cotton was comfortable, compared with 31% for polyester. Cotton also was more often perceived as soft (88% vs. 29%), breathable (84% vs. 27%), and a “quality fabric” (89% vs. 34%).

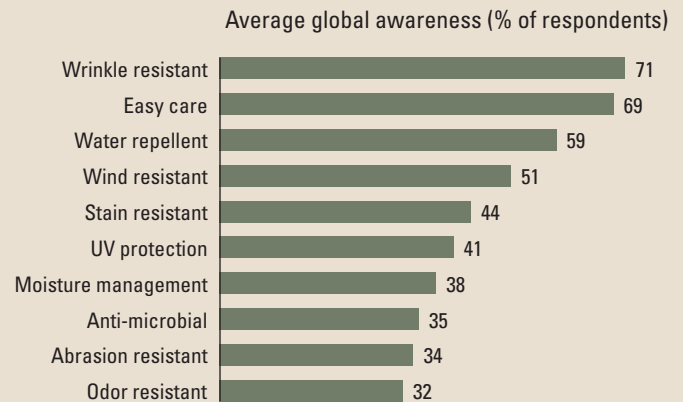
### THE EVOLUTION OF WRINKLE RESISTANCE

Wrinkle resistance is one of the most recognized functional features in the apparel market. Globally, over two thirds of

#### About the Survey

The Global Lifestyle Monitor is a biennial consumer research study conducted by Cotton Council International, Cotton Incorporated, and Synovate. In the 2008 survey, 5,000 consumers (approximately 500 in each of 10 countries) were surveyed via telephone and face-to-face interviews. Consumers were male and female, aged 15 to 54, and representative of each country's demographic and geographic profiles.

### AWARENESS OF FUNCTIONAL FEATURES



Global Lifestyle Monitor

consumers said they disliked wearing wrinkled clothing, and of those consumers who were concerned about wrinkling and had heard of wrinkle resistance, 60% said they had purchased wrinkle-resistant clothing.

Overall, 61% of global consumers said they would pay more for wrinkle resistance; however, several factors have combined to erode the price premium commanded by this popular feature. Wrinkle resistance has a history of innovation, and the cost of manufacturing wrinkle-resistant apparel has been reduced by advanced chemistries, combination finishes, and lower-cost processes. Furthermore, market saturation (with a proliferation of brands into the mass market) and rising consumer expectations of wrinkle resistance have reduced the price premium retailers and brands are able to demand. Recent research conducted by Cotton Incorporated in the U.S. market found that from 1994 to 2007, the price difference between wrinkle-resistant and non-wrinkle-resistant 100% cotton men's slacks decreased from 16% to 1%. At the same time, the share of wrinkle-resistant slacks in this market increased from 32% to 46% (according to NPD Fashionworld's AccuPanel).

### KNOWLEDGE BASE

From a list of ten functional features commonly found in apparel, over half of global consumers recognized *wrinkle resistant*, *easy care*, *water repellent*, and *wind resistant*, while fewer were aware of *stain resistant*, *UV protection*, *moisture*

# APPAREL FEATURES: GLOBAL ATTITUDES

management, anti-microbial, abrasion resistant, or odor resistant. These awareness levels tend to reflect the prevalence of these features in retail offerings. Of all consumers who were aware of at least one of these features, just over half had purchased at least one apparel item with the feature.

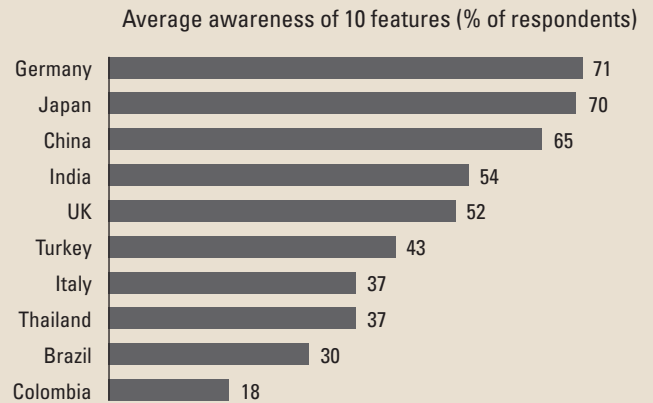
Average awareness of the ten apparel product features was highest in Germany (71%) and Japan (70%), followed by China (65%). Features recognized by more than nine out of ten consumers included *easy care* in Germany and *wrinkle resistant* and *water repellent* in both Germany and Japan. Overall awareness of the ten features was lowest in Colombia, where only 38% of consumers were aware of wrinkle resistance, the feature they were most likely to recognize.

## THE VALUE OF FUNCTIONALITY

For the two best-known functional features, easy care and wrinkle resistance, over 60% of global consumers said they would pay a premium. Of course, the actual prices for these features will be set by the market, as in the case of wrinkle-resistant apparel in the United States. Interest in functional features is so strong that consumers even expressed willingness to pay more for features they had not previously heard of. For example, though fewer than half of consumers (44%) were aware of stain-resistant apparel, over half (56%) said they would pay a premium for it—a clear indication of this feature’s appeal. Consumers who had purchased apparel with a particular feature were even more willing than the average consumer to pay a premium for that feature—indicating that they were satisfied with and appreciated the value of the feature in the garments they owned and used. This was especially true for the less-well-known features, suggesting that “early adopters” of new types of functional features value them and will look for them in the future.

According to recent data from Cotton Incorporated’s Retail Monitor™, approximately 35% of athletic apparel and active wear is marketed with at least one functional feature, and of these items, 42% have at least two features. The strategy of bundling product features also can be applied in markets beyond athletic apparel and active wear. Global consumers’ relatively low awareness of features such as moisture-management, UV-protection, odor-resistance, and anti-microbial properties signals a market opportunity, not only to create awareness but also to turn awareness into purchases. Although many of the technologies behind these features have been in the market for sev-

## AWARENESS BY COUNTRY



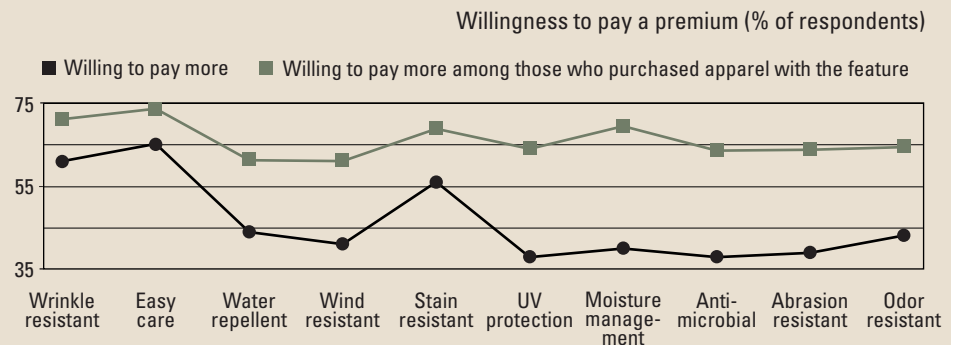
Global Lifestyle Monitor

eral years, the recent rise in awareness and availability of functional features in athletic apparel creates opportunities for the industry to extend these features into new apparel markets.

## NATURAL FIBER + ENHANCED FUNCTION = WINNING EQUATION

Consumers worldwide are aware of apparel with functional features. Most popular are features that minimize wardrobe maintenance, such as wrinkle resistance and easy care. Today’s innovations in the manufacture of cotton apparel make it possible for consumers around the world to enjoy the natural properties of their favorite fiber with added functional features that enhance the wearing experience. Consumers are willing to pay more for apparel with functional features, and they strongly prefer natural fibers, such as cotton—indicating that clothing made from natural fibers and offering added functional features will continue to resonate at retail. For more information on innovative features and finishes for cotton products, please visit [www.cottoninc.com/research](http://www.cottoninc.com/research).

## VALUE OF FUNCTIONAL FEATURES



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