

# INSIGHTS

## ECONOMY & THE *LIGHT GREEN* CONSUMER



U.S. consumers are keenly aware of environmental issues and are concerned about the environmental friendliness of the products they buy. However, economic pressures may affect how actively shoppers seek out products marketed as environmentally friendly and how willing they are to pay a premium for these products.

Cotton Incorporated has tracked U.S. consumer attitudes towards the environment since the mid 1990s through Lifestyle Monitor™ research and in 2006 expanded this research with several environment-focused consumer surveys. The 2009 Consumer Environment Survey confirms consumers' continuing concern about the environment and their awareness of factors that make apparel environmentally friendly, such as being made from natural fibers like cotton. Nonetheless, most consumers base their apparel purchase decisions on the key factors of fit, price, style, and color.

### THE ECONOMIC/ ENVIRONMENTAL EQUATION

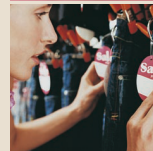
Price has always been a key factor for apparel shoppers, and today's highly price-conscious consumers are determined to find the best value for their money. When consumers were asked whether they would pay more for clothing or home-textile items that were environmentally friendly, 38% said no, 33% said they would pay a premium, and 27% said they

### KEY FACTORS TRUMP THE ENVIRONMENT

% of consumers rating the factor important (6+ on a scale of 1 to 10)



Fit  
98%



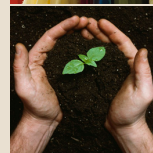
Price  
93%



Style  
89%



Color  
88%



Environmental friendliness  
51%

*Cotton Incorporated's  
2009 Consumer Environment Study*

weren't sure. A 2008 Yankelovich survey found that while consumers' concern about environmental issues was growing, especially among younger generations (aged 16 to 43), shoppers were less willing to pay for "green alternatives" to products and services than in 2007. Furthermore, when the 2009 Consumer Environment Study asked consumers about a host of global and environmental issues, rising prices at retail were of concern to the largest percentage of consumers (89%), leading other issues such as water quality (88%), air quality (87%), child labor practices (82%), depletion of natural resources such as oil (82%), and loss of rural farmland (79%).

### THE LIMITS TO ACTIVISM AT RETAIL

In addition to price, U.S. consumers consistently cite fit, style, and color as the most important factors in their apparel purchase decisions, greatly overshadowing environmental friendliness. Even though the majority of consumers consider it important for apparel to be environmentally friendly, there are limits to how far they will go to ensure that their purchases comply. For example, survey

respondents were asked to gauge their reactions upon discovering that a garment they had purchased turned out not to be environmentally friendly. The majority (59%) said they would be bothered but would do nothing about it, while 26% would not be bothered (up significantly from 21% in 2008). Only 14% of consumers would be extremely bothered and take some action (down significantly from 19% in 2008).

In a 2008 survey by TNS Retail Forward, price was the top factor driving consumers to particular stores, named as most important by 54% of consumers. In contrast, only 4% of consumers said that "commitment to social responsibility and resource sustainability" determined which stores they shopped.

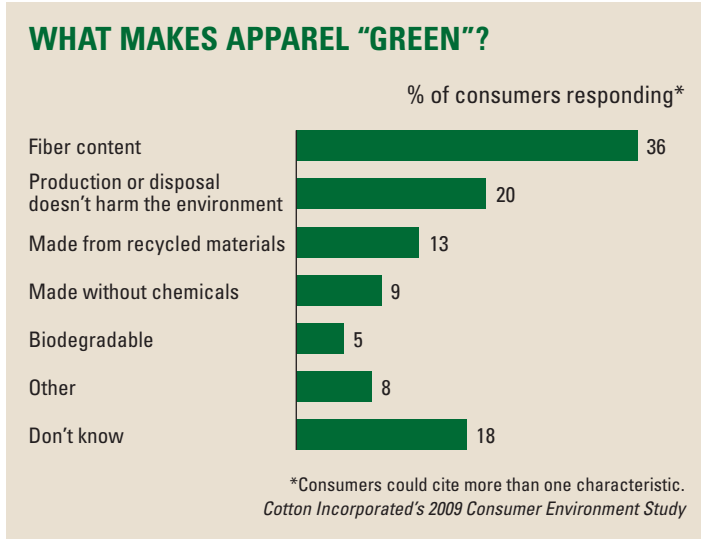
#### About the Research

Cotton Incorporated's 2009 Consumer Environment Survey was conducted via the Internet by Bellomy Research, Inc., in a nationwide sample of consumers aged 13 to 54. The sample was 60% female and 40% male and was representative of the U.S. population based on the U.S. Census. The Global Lifestyle Monitor is a biennial consumer research study conducted by Cotton Council International, Cotton Incorporated, and Synovate. The 2008 survey included 5,000 consumers (500 in each of 10 countries).

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## NATURAL HIGHS AND SYNTHETIC LOWS

From an environmental perspective, consumers perceive natural fibers like cotton to be markedly superior to synthetics. The 2009 Consumer Environment Survey sought to refine the definition of environmental friendliness by asking, “What makes an apparel item environmentally friendly?” The most popular response, cited by 36% of consumers, was fiber content.

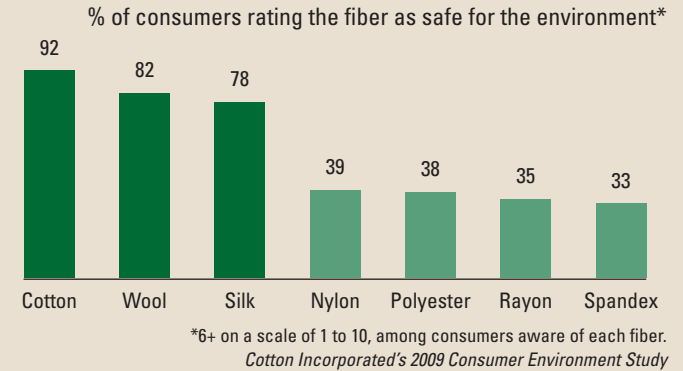


The importance of fiber content as a criterion for environmental friendliness is supported by consumers' perceptions of specific fibers. A solid majority (74%) of consumers believe that natural fibers, such as cotton, are better for the environment than synthetic fibers. Furthermore, 82% of consumers say that apparel made from 100% natural fibers is better for the environment than apparel made from recycled synthetic fibers. When asked whether specific fibers were safe for the environment, 92% of U.S. consumers rated cotton as safe. According to the Global Lifestyle Monitor, this attitude was shared by 87% of global consumers, and cotton was rated as safe by the largest percentage of consumers in each country surveyed. U.S. consumers also consider other natural fibers, such as wool and silk, to be safe for the environment, in contrast to manufactured synthetic fibers like nylon, polyester, rayon, and spandex. These attitudes towards synthetic fibers may be related to consumers' concern over the use of oil in the production of synthetic fibers—a concern shared by 65% of respondents.

## THE GREENING OF GARMENT CARE

Although many shoppers may not express their concern for the environment in their apparel purchases, consumers are taking action where they feel they can make the greatest impact: in their laundering habits. Most consumers say they al-

## CONSUMERS RATE COTTON AS SAFEST



ways or usually wash only large loads (83%) and limit use of detergents (77%). However, consumers have mixed motives for environmentally friendly laundering practices: 45% are doing so to save money, while only 24% are doing so to conserve energy and 11% to conserve water. Saving money is the top reason regardless of economic status—this motivation is cited by 46% of consumers with household incomes under \$50,000 and 43% of higher-income consumers. However, higher-income consumers are significantly more likely than lower-income consumers to use an energy-efficient washer or dryer (74% vs. 67%), while lower-income consumers are significantly more likely to limit the weekly number of loads washed (65% vs. 60%) or dried (61% vs. 52%).

In general, consumers are concerned about environmental issues and are environmentally aware when it comes to apparel. However, it is not surprising that they are most likely to act on their environmental concerns when such action also is in their economic best interest.

## CONSUMERS' LAUNDERING PRACTICES

% of consumers responding, by annual household income

Always or usually	< \$50K	\$50K+	Total
Wash only large loads or limit small loads	82	85	83
Limit laundry detergent use	76	77	77
Limit trips to the dry cleaner	75	77	76
Use cold water to wash	69	72	71
Use energy-efficient washer or dryer	67	74	70
Limit amount of water used	63	63	63
Limit number of loads washed weekly	65	60	63
Limit number of loads dried weekly	61	52	57

Cotton Incorporated's 2009 Consumer Environment Study

