Concern for sustainability influences over three-quarters of consumers when they shop for food and household appliances, and 61% say it influences their clothing purchases. While traditional purchase drivers such as quality, fit, and comfort are most important, sustainability can be a differentiator to set a brand apart from others. Achieve this by tapping into consumer environmental concerns and signaling product quality and durability.

**KEY INSIGHTS**

- Brands can capitalize on consumer perceptions of natural fibers by emphasizing their quality, durability, and sustainability.
- Cotton and other natural fibers are clear-cut winners in consumer perceptions of sustainability.
- Brands have an opportunity to build on emerging awareness of environmental concerns over synthetic fibers such as microfiber waste to promote more sustainable fiber options.

**CLOTHING PURCHASE DRIVERS**

- Quality, fit, comfort: 91%
- Durability, price: 89%
- Clothing material: 86%
- Style: 82%
- Softness: 81%
- Color: 80%
- Performance features: 75%
- Sustainability: 74%
- Laundering instructions: 72%
- Country of origin: 62%
- Brand name: 56%

**IMPORTANCE OF SUSTAINABILITY IN CLOTHING PURCHASE**

<table>
<thead>
<tr>
<th>Country</th>
<th>Somewhat Important</th>
<th>Very Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>29%</td>
<td>60%</td>
</tr>
<tr>
<td>China</td>
<td>34%</td>
<td>60%</td>
</tr>
<tr>
<td>Mexico</td>
<td>49%</td>
<td>49%</td>
</tr>
<tr>
<td>Italy</td>
<td>49%</td>
<td>40%</td>
</tr>
<tr>
<td>Germany</td>
<td>29%</td>
<td>32%</td>
</tr>
<tr>
<td>U.S.</td>
<td>22%</td>
<td>26%</td>
</tr>
<tr>
<td>U.K.</td>
<td>17%</td>
<td>26%</td>
</tr>
</tbody>
</table>

**WHAT MAKES CLOTHING SUSTAINABLE?**

- Natural: 56%
- 100% Cotton: 52%
- Organic: 47%
- Durable or Long-Lasting: 45%
- Less Irritating to Skin: 44%
- High Quality: 44%
Consumers consider fabric a determinate of sustainability, and they look for clothing made from natural fibers such as cotton. While only 25% of global consumers are aware of environmental issues surrounding synthetic fiber production and use, an increasing amount of media attention is bringing these to light. Consumers do have significant opinions on which fibers are safe for the environment, as fewer than 10% believe man-made fibers such as rayon, nylon, and polyester are sustainably produced.

**Fabric Determines Sustainability**

**How Important is Fabric in Determining Sustainability?**

- Extremely: 20%
- Very: 31%
- Essential: 13%
- Somewhat: 31%
- Not important: 4%

**Perceptions of Safety and Sustainability**

<table>
<thead>
<tr>
<th>Fiber</th>
<th>Safe for Environment</th>
<th>Sustainably Produced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cotton</td>
<td>91%</td>
<td>63%</td>
</tr>
<tr>
<td>Wool</td>
<td>87%</td>
<td>51%</td>
</tr>
<tr>
<td>Rayon</td>
<td>53%</td>
<td>8%</td>
</tr>
<tr>
<td>Nylon</td>
<td>46%</td>
<td>9%</td>
</tr>
<tr>
<td>Polyester</td>
<td>45%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**Top Fiber Production Concerns**

- Microfiber waste in the oceans from synthetic fibers
- Amount of chemicals to produce man-made fibers
- Greenhouse gas emissions as a result of producing man-made fibers
- Amount of pesticides to produce cotton

**Sources:** Cotton Council International & Cotton Incorporated 2017 Global Environment Survey – survey of 7,365 women & men, ages 18-60 in the U.S., U.K., India, China, Mexico, Germany, and Italy who have involvement in clothes shopping.

**Learn More** about Sustainable Cotton Innovations at [http://cottontoday.cottoninc.com](http://cottontoday.cottoninc.com)