

GLOBAL CONSUMER INSIGHTS



GLOBAL LIFESTYLE MONITOR: UNITED KINGDOM

APPAREL SPENDING

Consumers in the United Kingdom spent \$76.3 billion on clothing in 2017. Despite economic uncertainty with the impending Brexit, British apparel spending is expected to outpace that of the European Union with a 60% growth by 2030. Reach British consumers in the many places they shop with comfortable clothing at an affordable price.



KEY TRENDS



How They Shop: Create integrated, multi-channel campaigns to communicate with consumers in each place they shop, both online and off.

What They Shop: Offer comfortable basics with a focus on fit, quality, and price.

Spotlight on Gen Z and Millennial Optimism: Target this market segment that remains optimistic despite Brexit fears.

FINANCIAL OUTLOOK

OPTIMISTIC
 U.K. 45% Global 56%

PESSIMISTIC
 U.K. 16% Global 11%

* "Neither Optimistic/Pessimistic" not shown

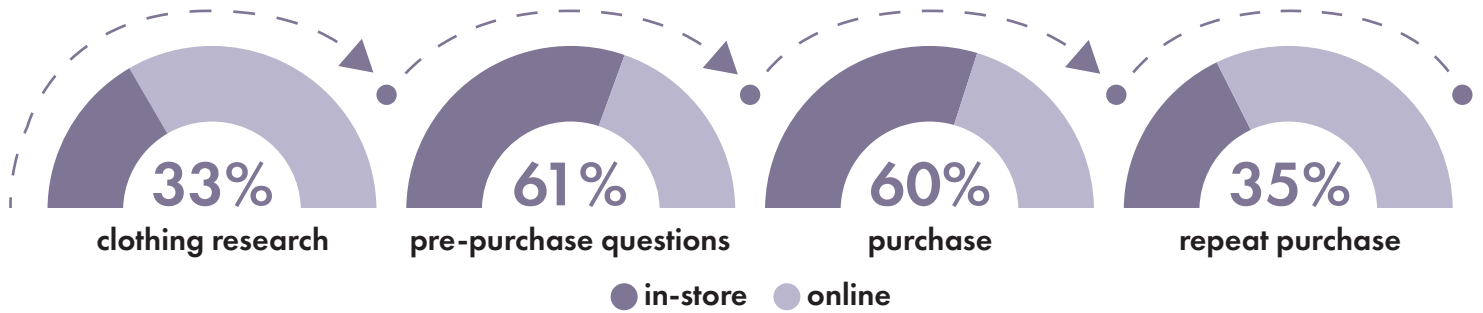
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HOW THEY SHOP

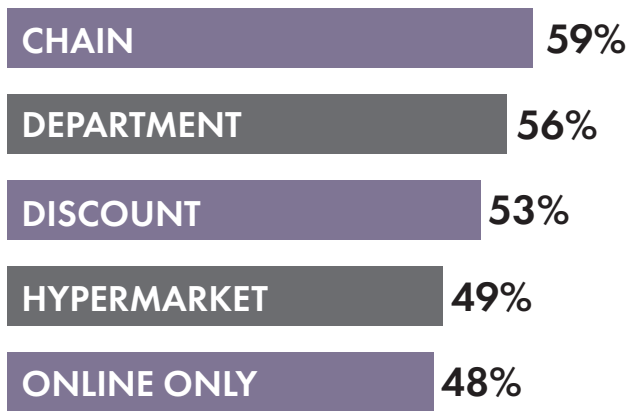
British consumers blend many resources to shop for clothing. They shop at an average of four types of stores with no single type dominating the retail landscape. With near-universal internet access (94% regularly use the internet)¹, Britons use the internet both to find clothing inspiration and to purchase items. Help consumers plan and execute their clothes shopping by speaking to them across multiple physical and online outlets.

SHOPPING JOURNEY

Consumers who prefer shopping in-store (vs. online)



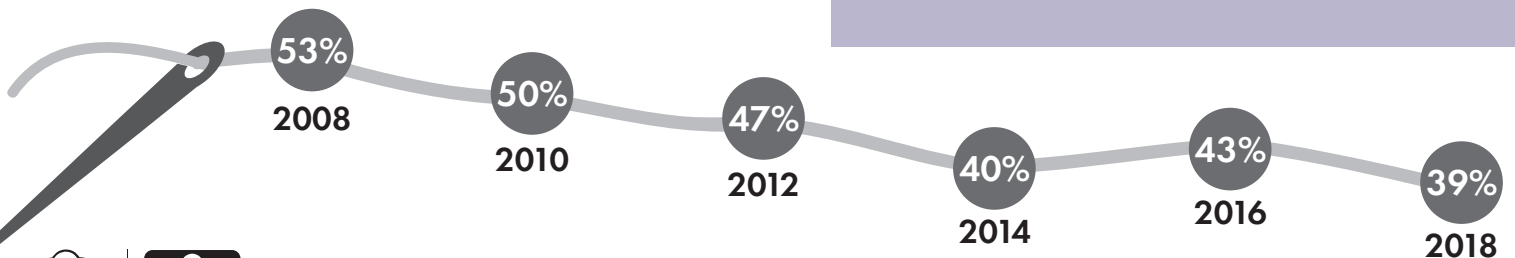
RETAIL STORES SHOPPED FOR CLOTHING



51% Shop online at least once per month.

APPAREL SHOPPING HABITS

Buying Clothes on Impulse



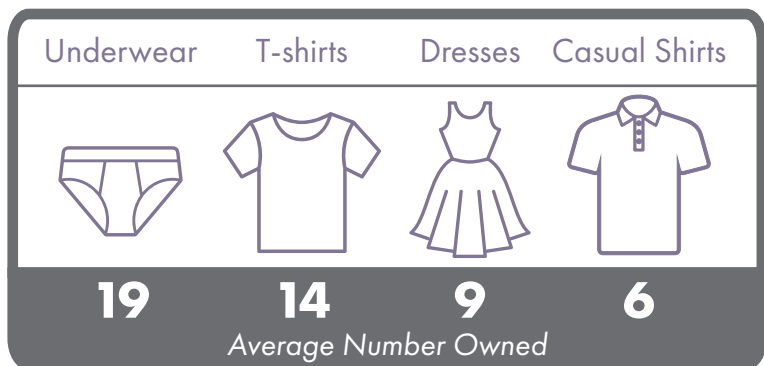
SOURCES FOR CLOTHING IDEAS



WHAT THEY SHOP

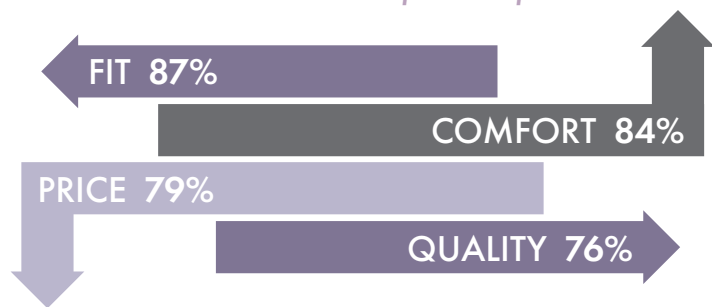
British consumers look for clothing to fit well and feel comfortable, and they are willing to pay more for quality. They stock up on basics, such as owning on average 19 pairs of underwear and 14 t-shirts. Eight in ten consumers (82%) say their most-worn clothing is made of cotton and they are most interested in technologies to increase comfort throughout their days. Meet British consumers' needs with high quality, comfortable clothing made with cotton-rich fabrics.

TOP ITEMS OWNED

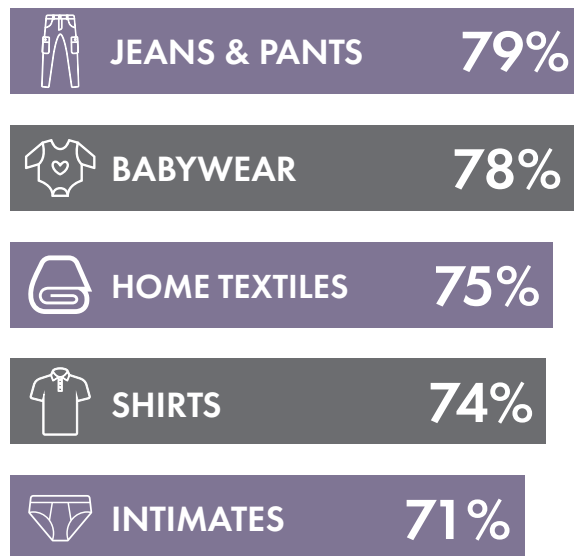


PRIMARY PURCHASE DRIVERS

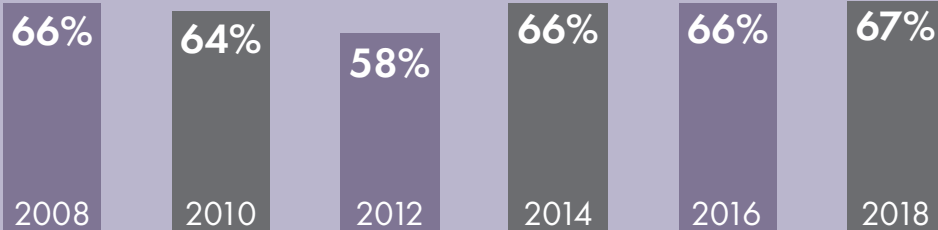
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER



PAY MORE FOR BETTER QUALITY



PERFORMANCE APPAREL

Likely to Purchase



40%
Regulate Body Temperature



37%
Relieve Stress



28%
Monitor Hydration



26%
Charge Electronics



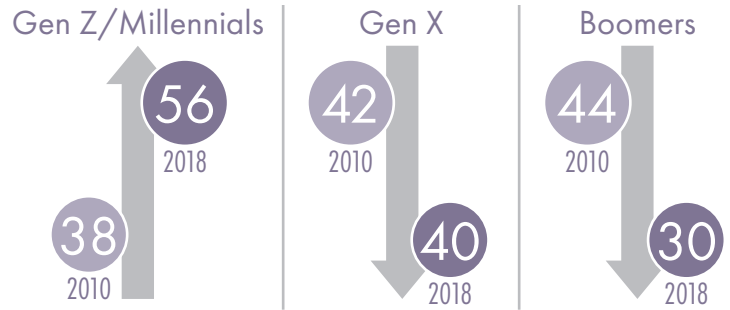
25%
Manage Mood/Emotions

SPOTLIGHT

GEN Z & MILLENNIAL OPTIMISM



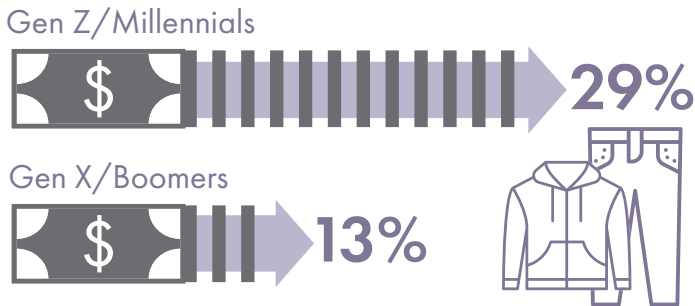
FINANCIAL OPTIMISM
Percent optimistic about personal finances



At a time of future economic uncertainty in the UK, younger Britons stand out for their optimism about personal finances. In the past eight years, members of Gen Z and Millennials have become more optimistic, while at the same time Boomers have seen a drop in optimism. Whether because or in spite of the country's impending exit from the European Union, the future looks bright to younger Brits. Reach these eager shoppers on mobile platforms and social media as they build up their wardrobes in the coming years.

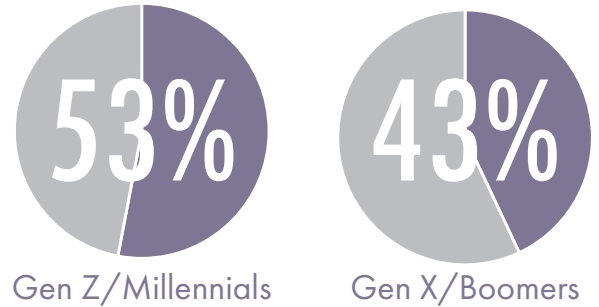
SPEND MORE ON CLOTHING

Gen Z & Millennials Plan to Spend More on Clothing in the Coming Year



FREQUENT SHOPPERS

Shop for Clothing Monthly or More



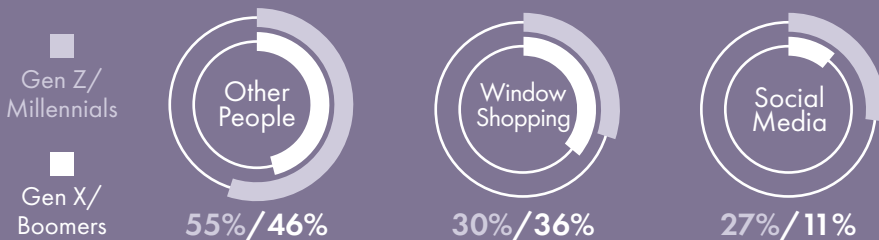
SHOPPING JOURNEY

Prefer the Following Ways to Shop at Each Stage of the Shopping Journey



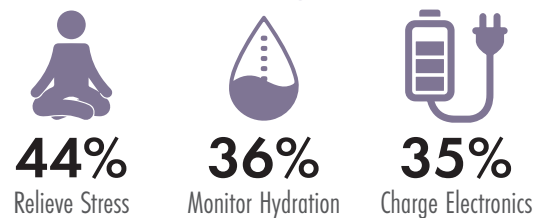
CLOTHING INSPIRATION FROM OTHERS

Sources of Clothing Ideas



FREQUENT SHOPPERS

Younger Consumers Are Interested In Clothing That:



Source: Cotton Council International and Cotton Incorporated's Global Lifestyle Monitor Survey, a biennial consumer research study. In the 2018 survey approximately 10,000 consumers (i.e. 1,000 consumers in 10 countries) were surveyed. External Source: 'Euromonitor International

