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# Consumers & Clothes: Adapting to a Changing World



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# Consumers & Clothes: Adapting to a Changing World



COVID-19



DENIM



DURABILITY

A decorative graphic on the left side of the slide consisting of a cluster of overlapping hexagons in various shades of blue and grey. Some hexagons are solid, while others are outlined.

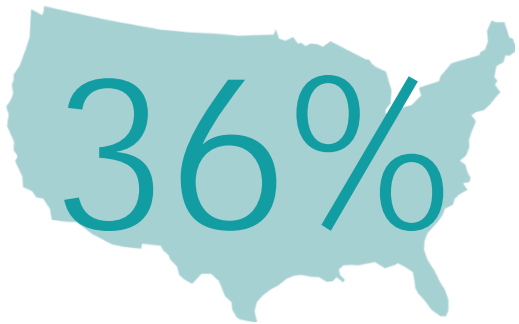
# What to Wear in a Pandemic

# Back to Normal?

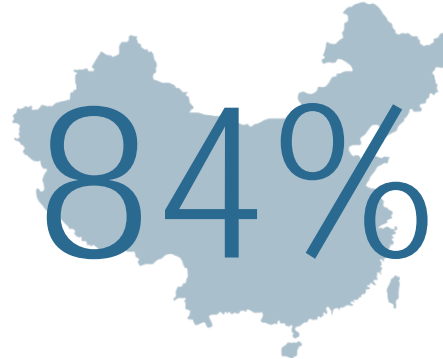
Different realities in the U.S. and China

*Percentage of consumers who agree:*

U.S.



China



My community is back to normal,  
much like before the pandemic



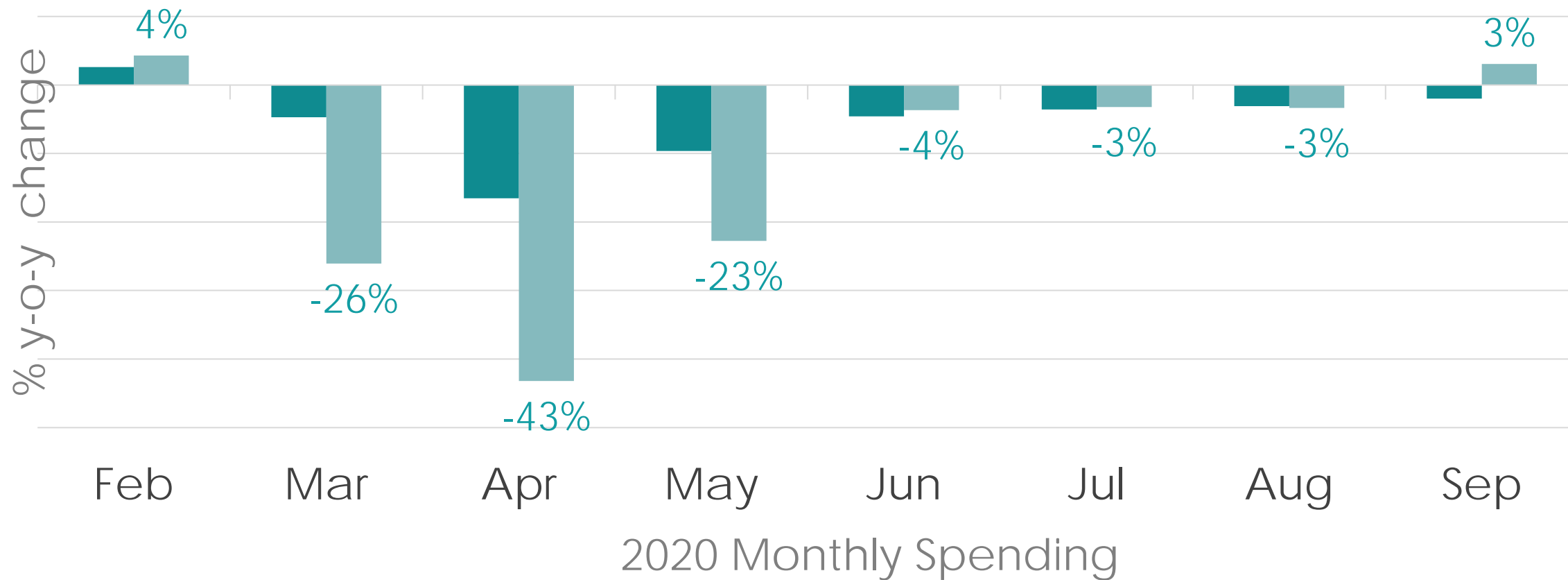




# Effects on Consumers Spending: U.S.

Clothing spending is slowly recovering

■ Overall ■ Clothing



Source: U.S. Department of Commerce

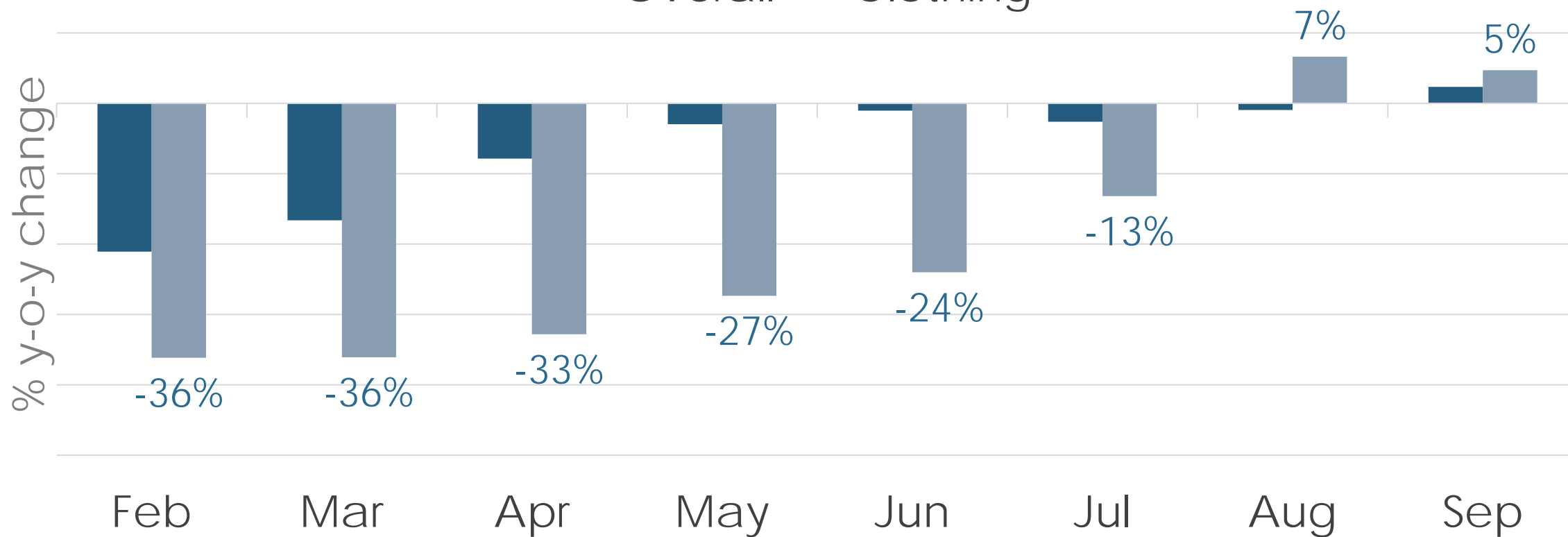




# Effects on Consumers Spending: China

Clothing spending is slowly recovering

■ Overall ■ Clothing



2020 Monthly Spending

Source: China NBS, U.S. Department of Commerce

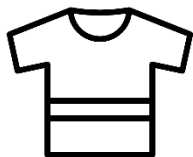


# What to Wear in A Pandemic

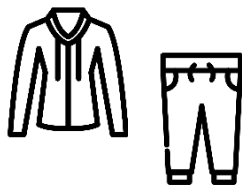
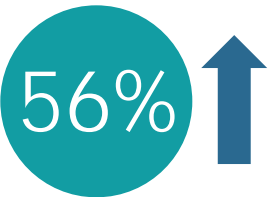
Consumers wear more comfortable clothing

*Clothing worn most often*

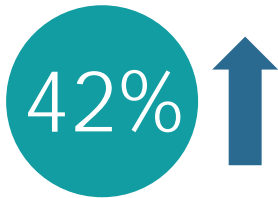
## Wearing More



T-shirts



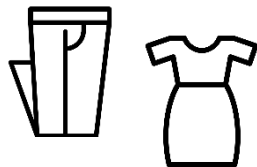
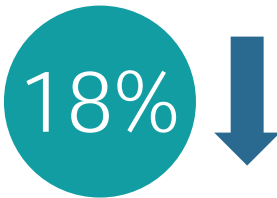
Sweatshirts/pants  
& joggers



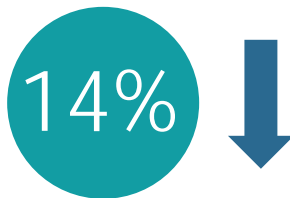
## Wearing Less



Casual shirts



Dress pants or  
dresses

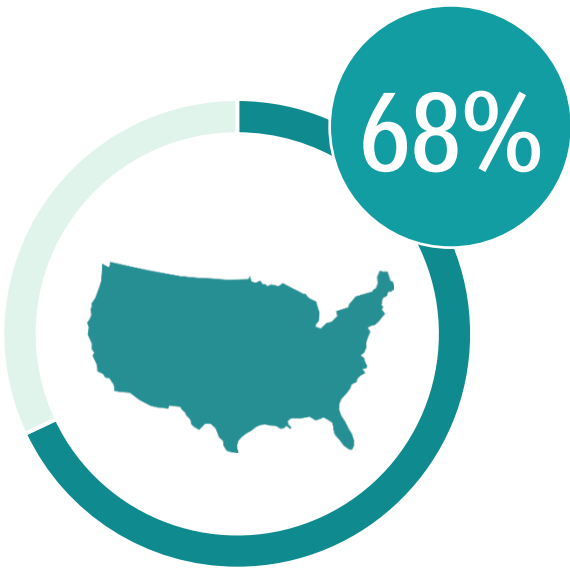




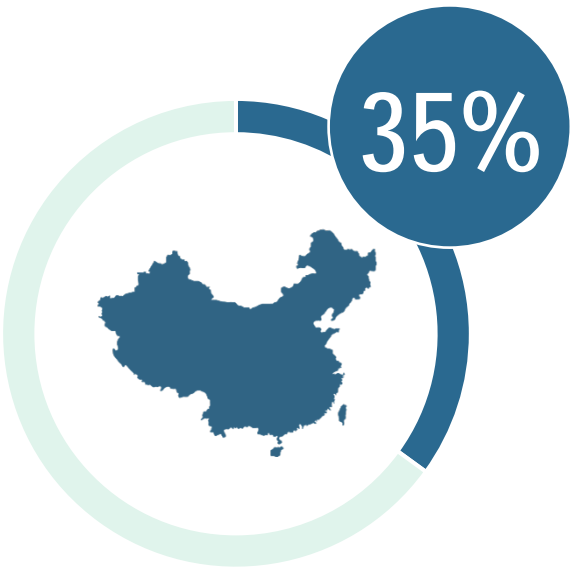
# Accelerating a Workplace Trend

Casual dress and telecommuting rising as workplace benefits

U.S.



China



Work or study from  
home part or full-time



Source: Cotton Incorporated's 2020 Coronavirus Response Survey Wave 4, Nov 24-27

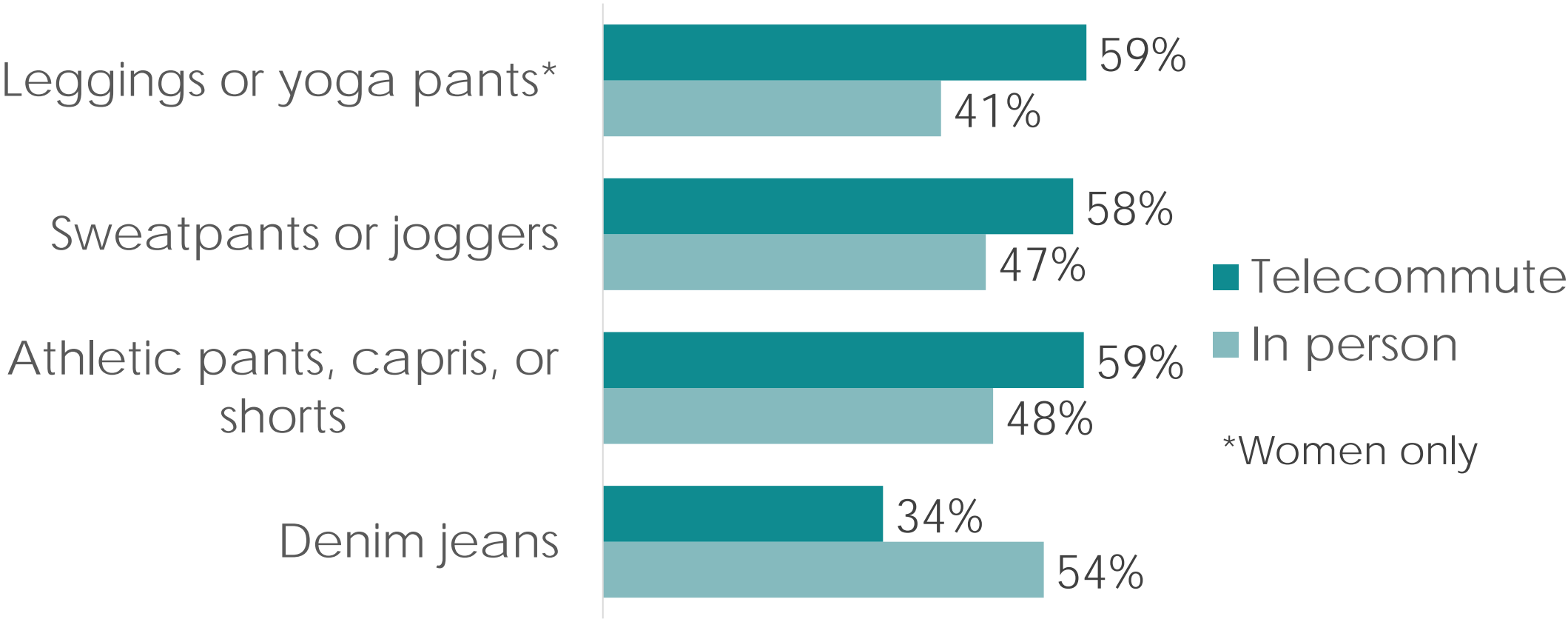




# What to Wear in A Pandemic

Consumers choose comfortable bottom wear

*In the past month, which have you worn most often?*

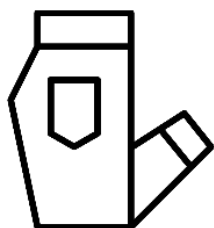




# What to Wear in A Pandemic

Consumers wear more comfortable clothing

*Bottoms worn most often*



Denim  
jeans

63%



Athletic pants  
or shorts

54%



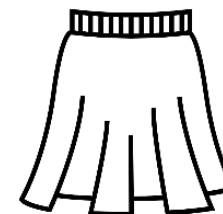
Sweatpants  
or joggers

47%



Dress pants  
or dresses

32%



Casual skirts\*  
or dresses

31%

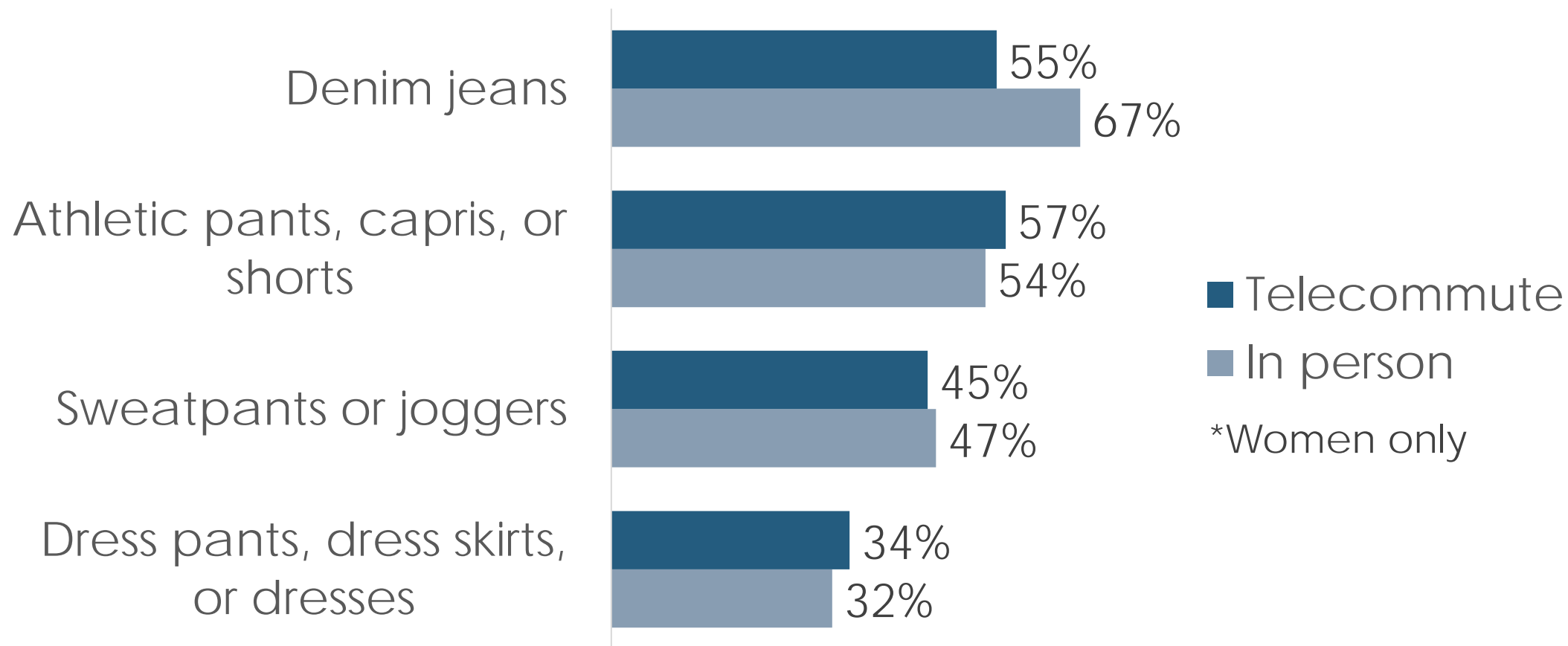
\* Women only



# What to Wear in A Pandemic

Consumers choose comfortable bottom wear

*In the past month, which have you worn most often?*







# Clothing Purchases: U.S.

Consumers seeking out for loungewear and active clothing



Plan to purchase clothing  
in the next 3 months

*% of consumers who plan to purchase the  
following in the next 3 months:*



28%

Denim jeans



25%

T-shirts



26%

Loungewear



26%

Activewear



# Clothing Purchases: China

Consumers seeking out for loungewear and active clothing



Plan to purchase clothing  
in the next 3 months

*% of consumers who plan to purchase the  
following in the next 3 months:*



36%

Clothing to  
dress up



32%

Athleisure



32%

Activewear



29%

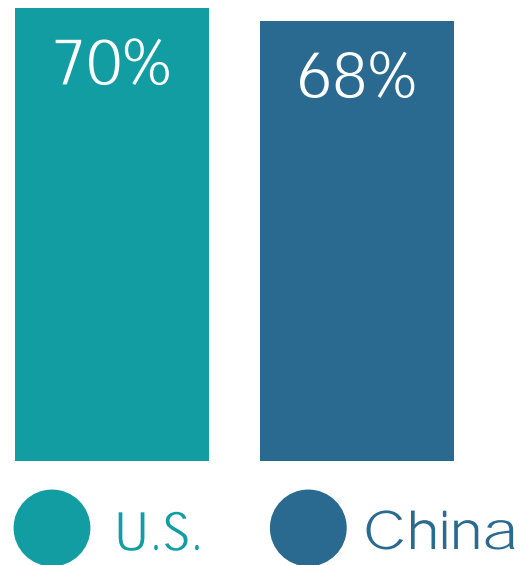
Loungewear



# Cotton = Comfort

Consumers choose cotton for comfort and safety

*% of consumers rate cotton  
very comfortable:*



**80%** Prefer their clothing to be made of cotton



# What to Wear in a Pandemic

## Summary



Clothing  
spending hit  
hard, but on  
the path to  
recovery



Accelerating  
the trend,  
consumers  
choose casual  
comfort



Consumers  
look to buy  
clothing for  
comfort



# The Enduring Appeal of Denim Jeans

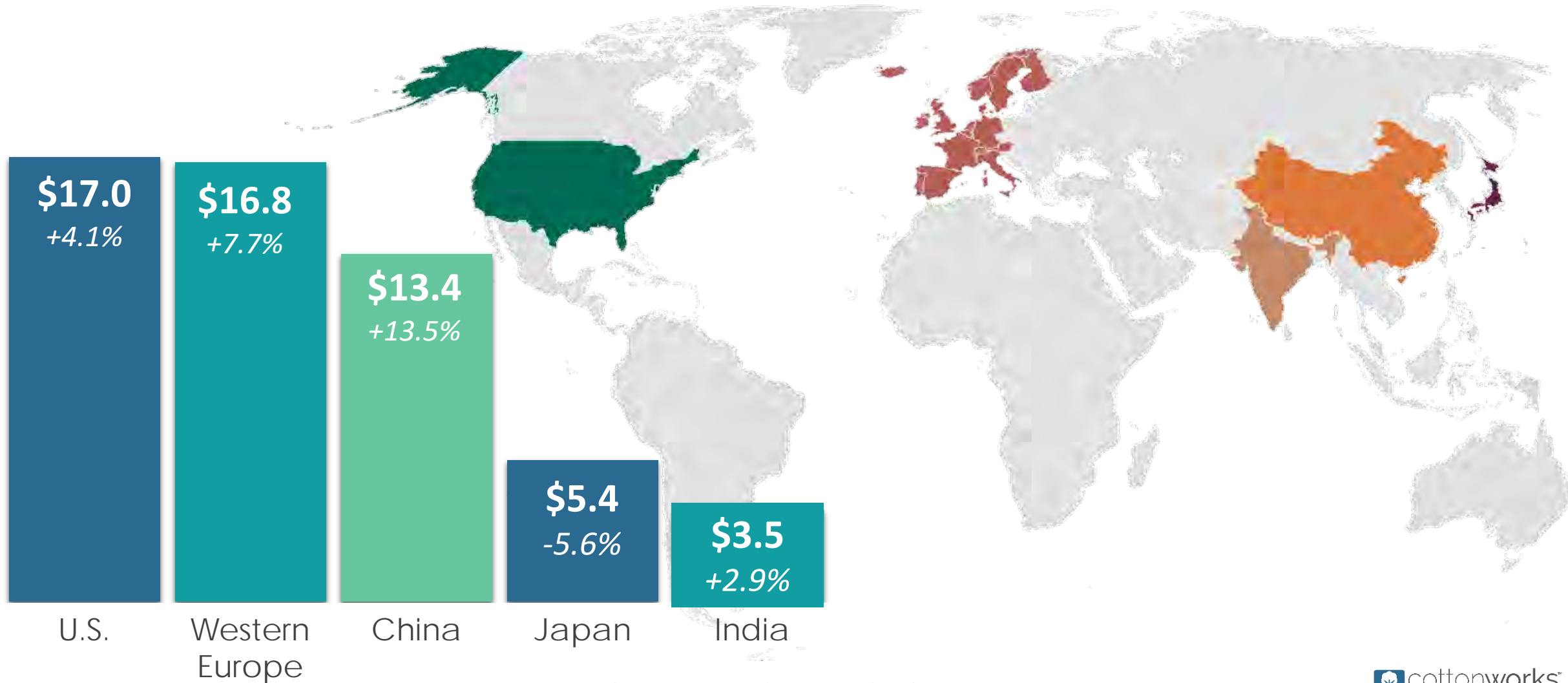
# Global Jeans Spending 2024

Growth from 2019 to 2024 (Billions USD)



**\$106**

**+9%**



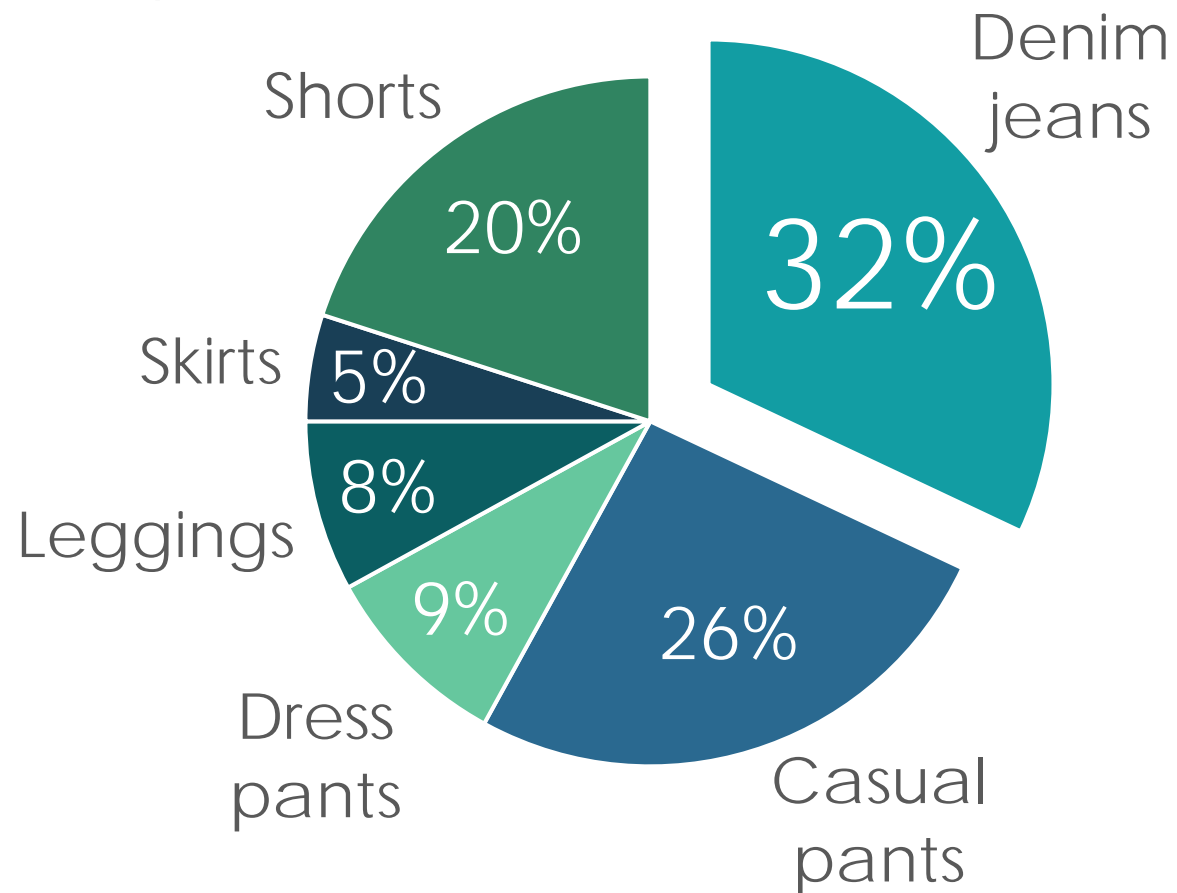
Source: Euromonitor International



# Allocation of Bottoms at U.S. Retail

*Denim jeans represent one third of bottom wear floor space*

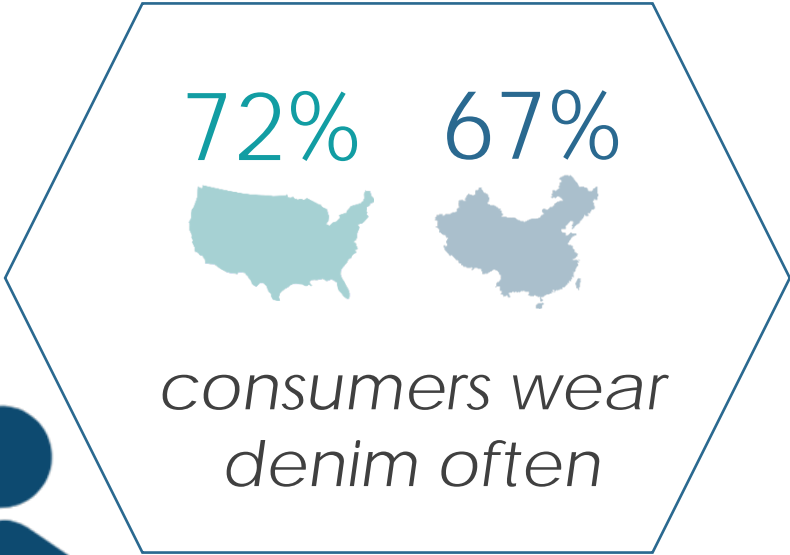
*Floor space allocation, U.S.:*





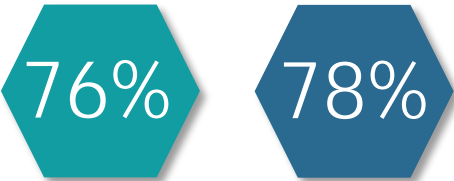
# Denim is Here to Stay

Consumers will continue to enjoy and wear denim



*Percentage of consumers who agree that:*

Denim jeans can never go out of style



Nothing could ever take the place of denim jeans in my wardrobe



● U.S. ● China



# Drivers of Denim Purchases

Fit and comfort are priority for consumers

1

Fit | Comfort

2

Price | Quality | Durability

3

Style | Performance | Brand | Sustainability

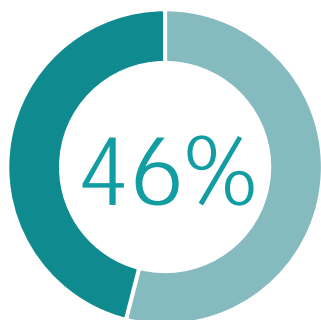


# Jeans Left in the Closet

Fit and comfort are top reasons jeans are unworn

*% of denim jeans pairs  
NOT worn regularly:*

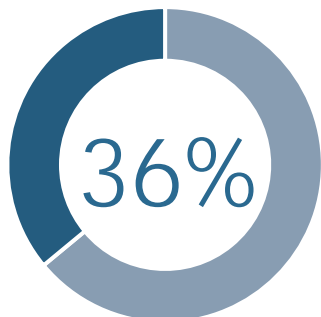
U.S.



*Reasons not to wear jeans:*

1. Poor fit, 44%
2. Not comfortable, 33%
3. Holes/tears in the fabric, 25%

China



1. Fading or discoloration, 34%
2. Not comfortable, 28%
3. Poor fit, 25%



# Finding Fit

Online retailers improving fit issues

*Would be more likely to buy denim jeans from a brand that offered:*

66%

A measurement tool that accurately finds my fit and size

61%

Detailed explanations of styles and fits

Hourglass



Apple



Pear



Inverted Triangle



**What body type are you?**

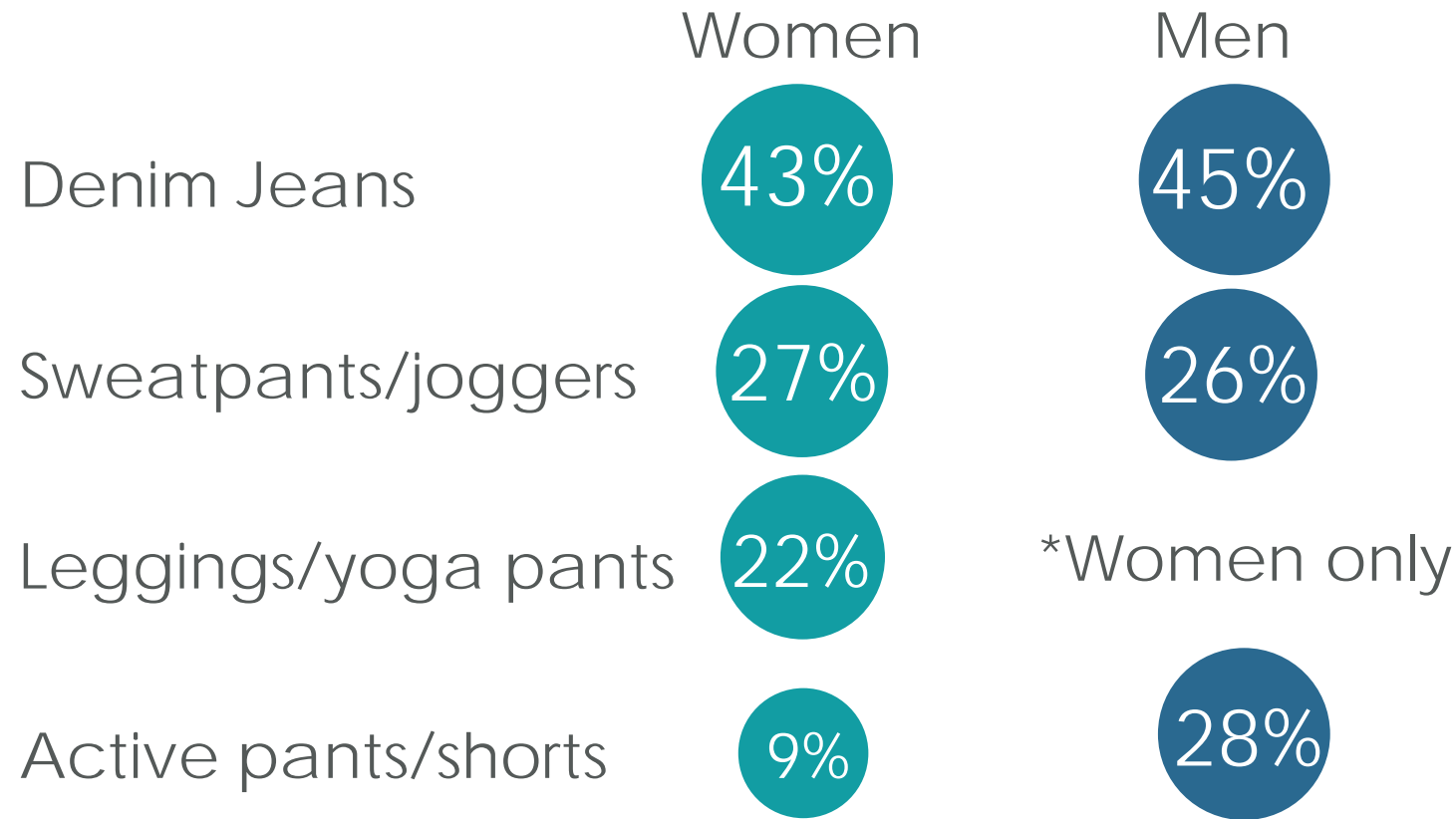




# Jeans Preferred for Comfort: U.S.

Consumers pick jeans are the most comfortable bottom

*Percentage of consumers who say the following type of bottoms are the most comfortable:*



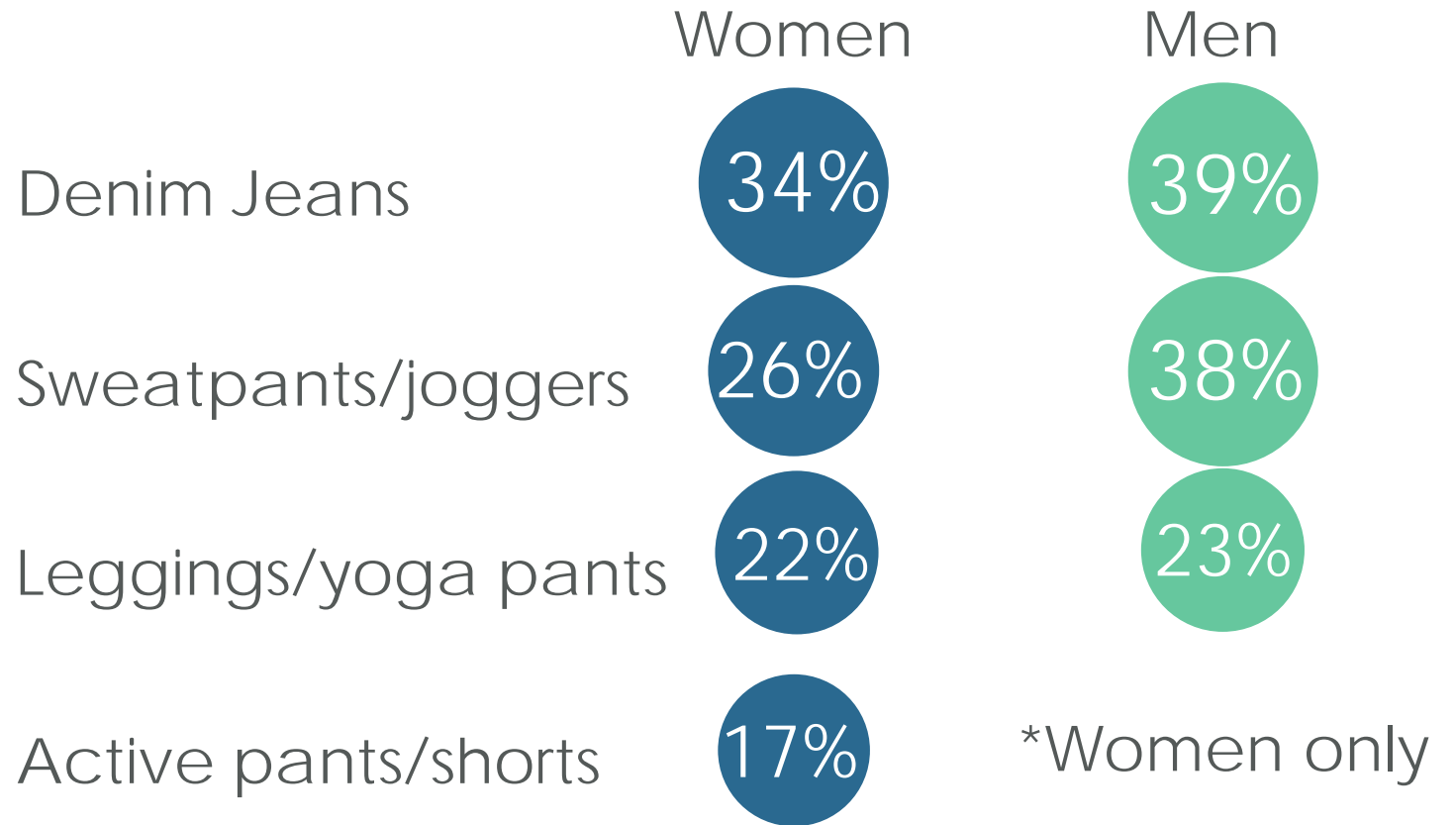
Source: Cotton Incorporated's 2020 Global Denim Survey



# Jeans Preferred for Comfort: China

Consumers pick jeans are the most comfortable bottom

*Percentage of consumers who say the following type of bottoms are the most comfortable:*

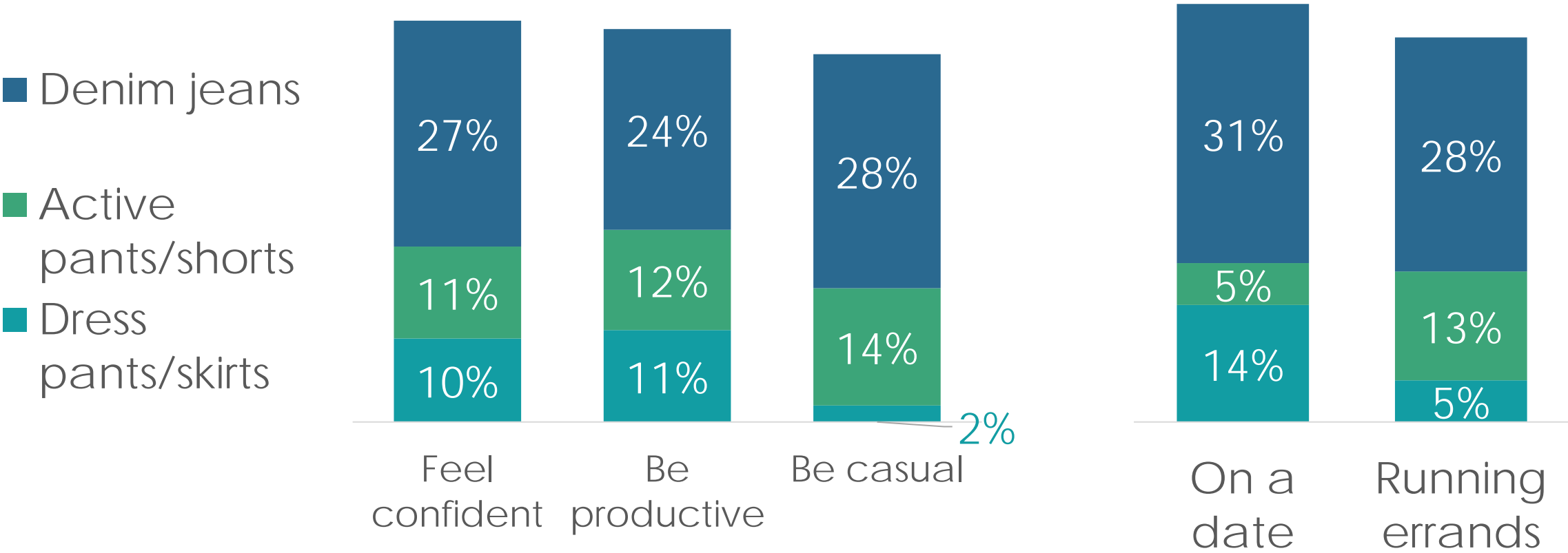




# Jeans for All Times

Consumers enjoy jeans for diverse occasions and moods

*Percentage of consumers who prefer the following when they want to:*



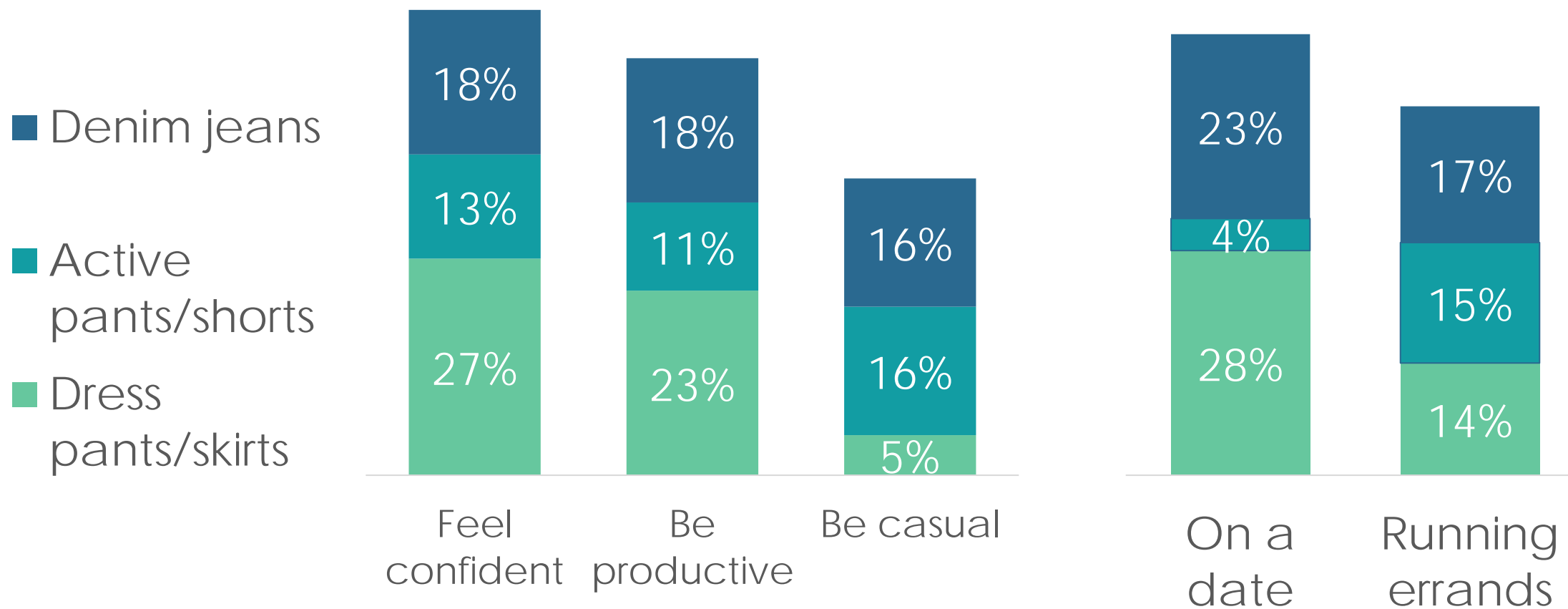
Source: Cotton Incorporated's 2020 Global Denim Survey



# Jeans for All Times: China

Consumers enjoy jeans for diverse occasions and moods

*Percentage of consumers who prefer the following when they want to:*







# True Denim is Cotton

Consumers choose cotton jeans

*% of consumer who describe cotton denim jeans, compared to manmade fiber blended, as the most:*

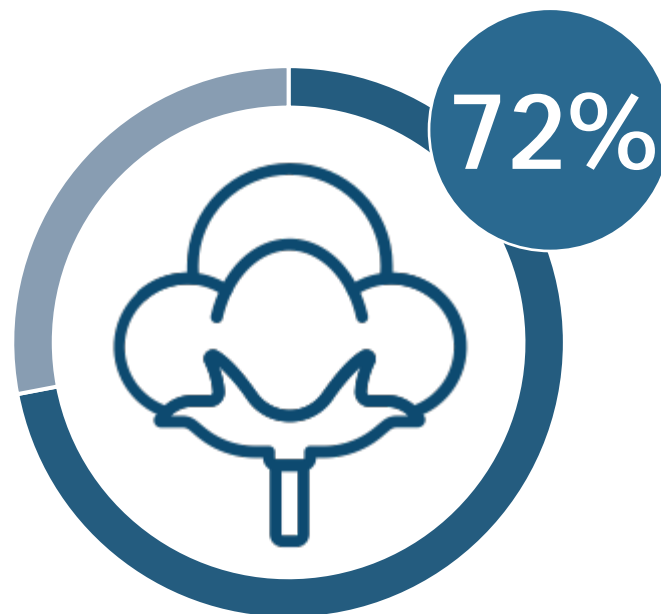
89% Comfortable

89% Authentic

87% High quality

87% Sustainable

82% Versatile



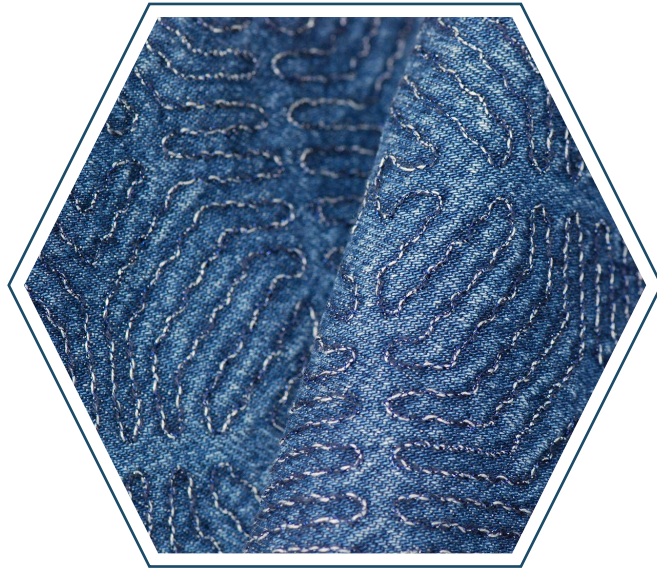
Prefer denim jeans to be made of 100% cotton or cotton/stretch





# Denim Innovation

Cotton Incorporated continues to create new and innovative technologies and looks for denim



**FABRICAST™ 7289**  
Denim embroidered  
with multi-twist cotton  
novelty yarn



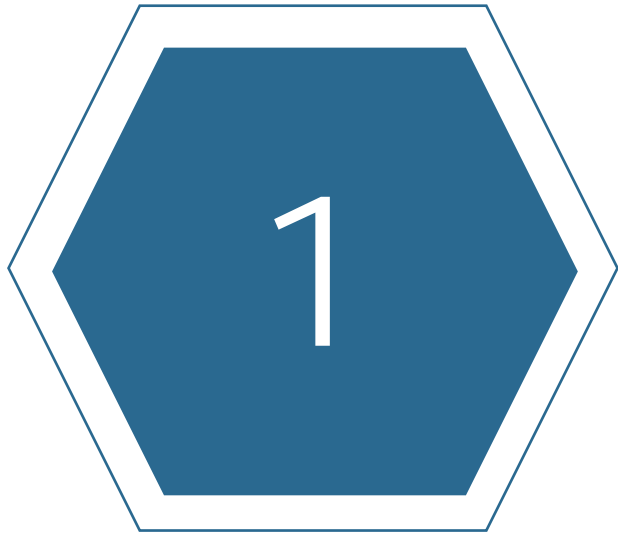
**FABRICAST™ 7150**  
100% cotton selvedge denim  
with TransDRY® technology



**FABRICAST™ 7223-1**  
100% cotton  
cationic denim

# The Enduring Appeal of Denim Jeans

## Summary



Denim jeans are  
a staple of  
consumer  
wardrobes



Fit, comfort, and  
versatility are  
key to denim  
jeans' appeal



High quality cotton  
and innovative  
fabrics bring value  
to iconic garment

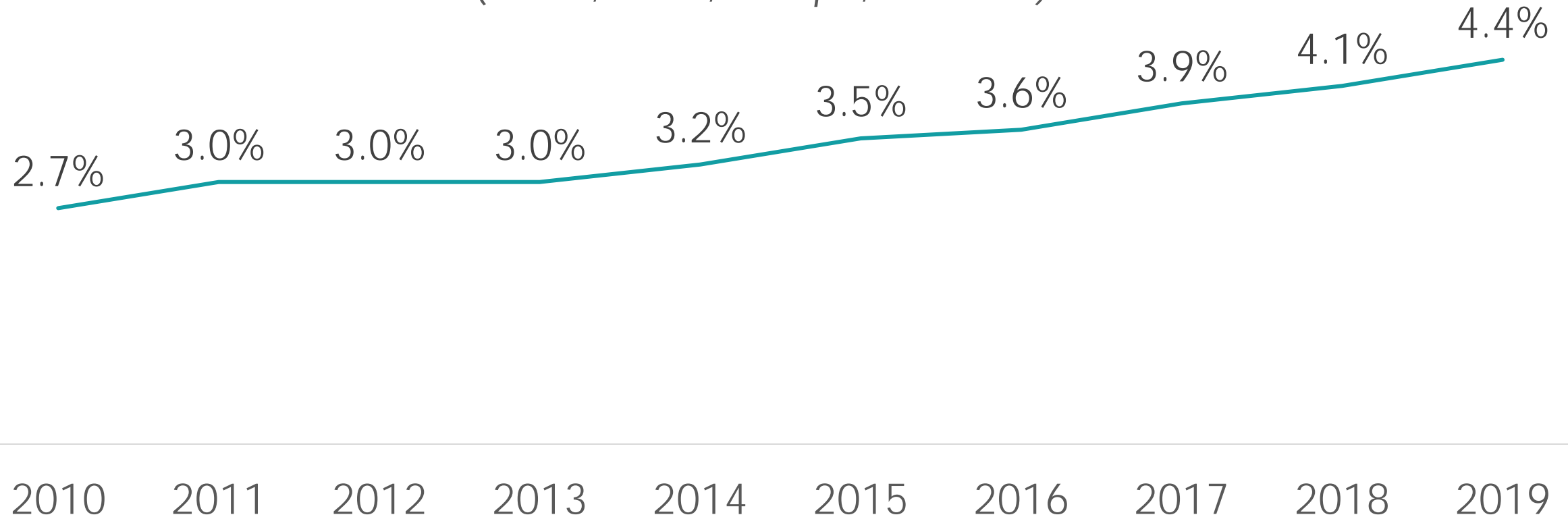


# Finding Clothing That Lasts

# The Rise of Fast Fashion

Fast fashion grows its share of all apparel sales

*Apparel market share of top fast fashion brands  
(H&M, Zara, Uniqlo, Primark)*

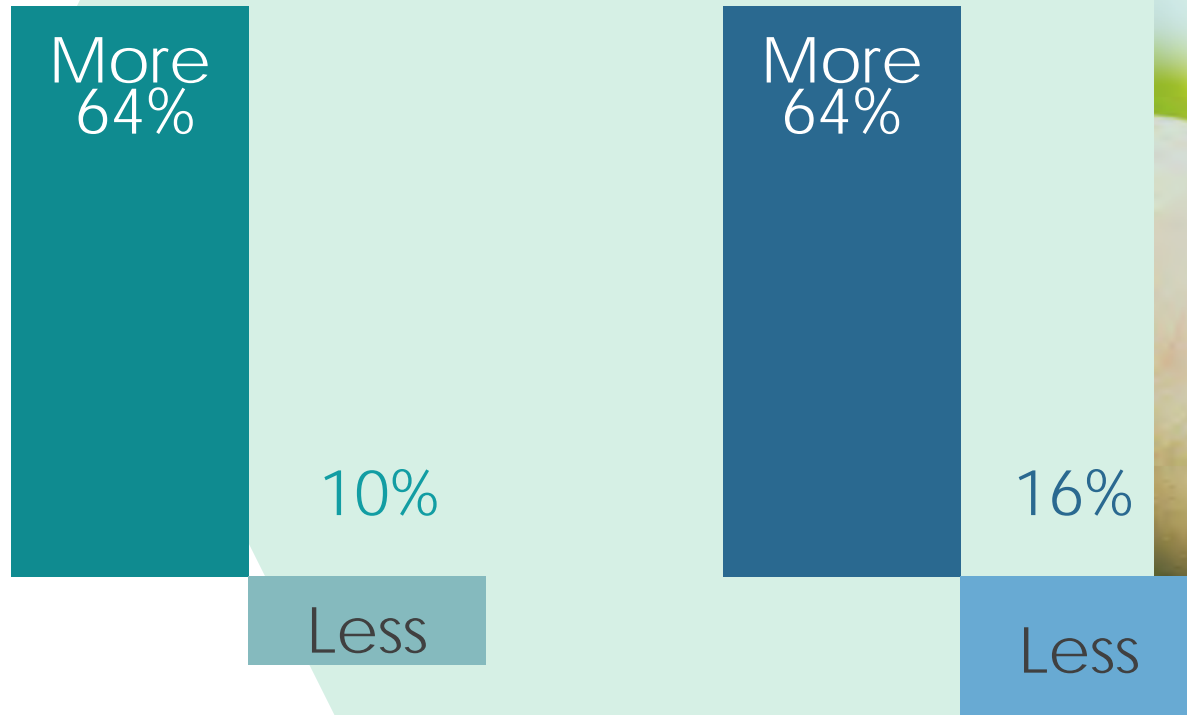




# Changing Concern for Environment

Consumers' concerns over environmental/sustainability issues are growing

*How have your concerns about sustainability changed since the start of COVID-19?*



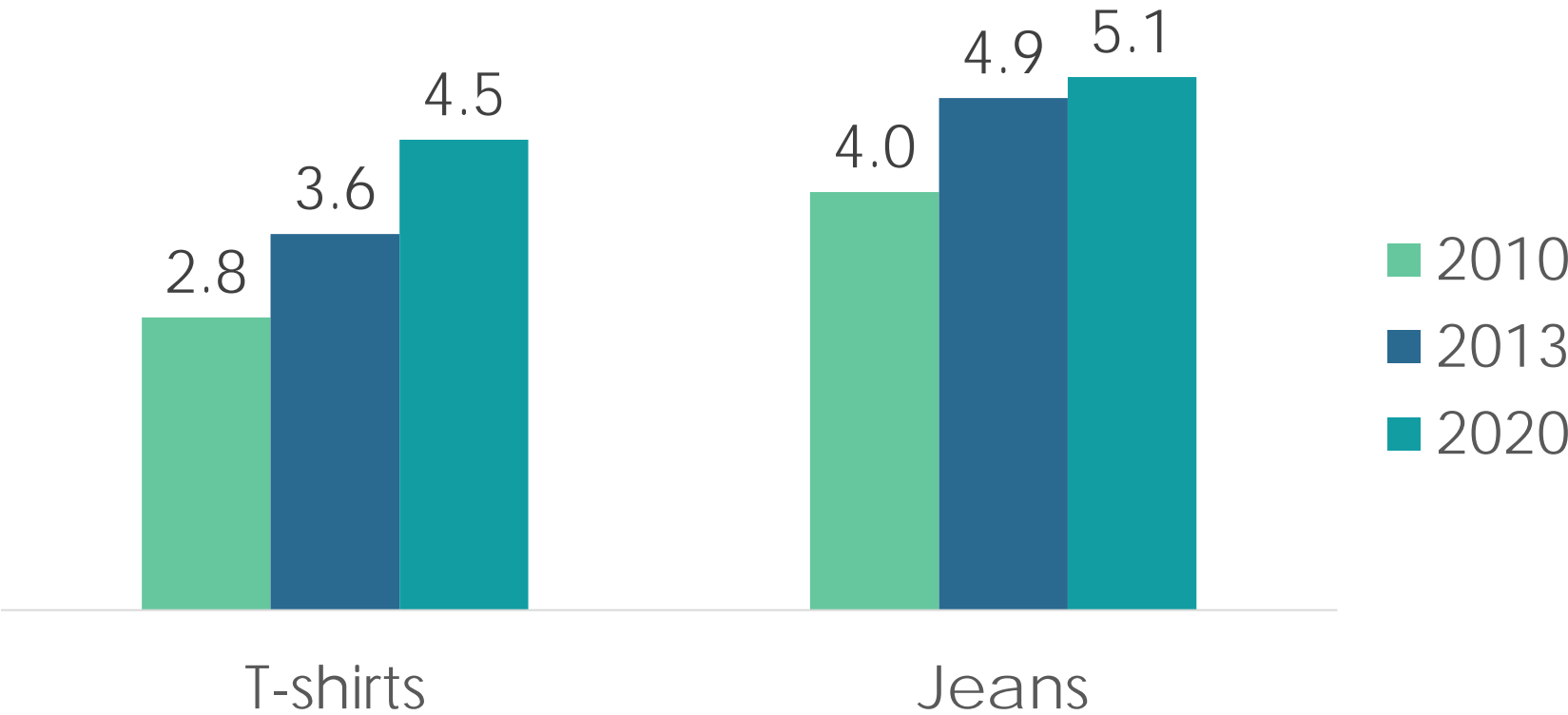




# Durable Expectations

Consumers expect their clothing to last longer

*Average number of years consumers expect a garment to last:*



Source: Cotton Incorporated's *Lifestyle Monitor*™ Survey and CCI & Cotton Incorporated's 2020 Durability Survey

# Durability Study Methodology

Looking inside consumers' closets

**86**  
garments

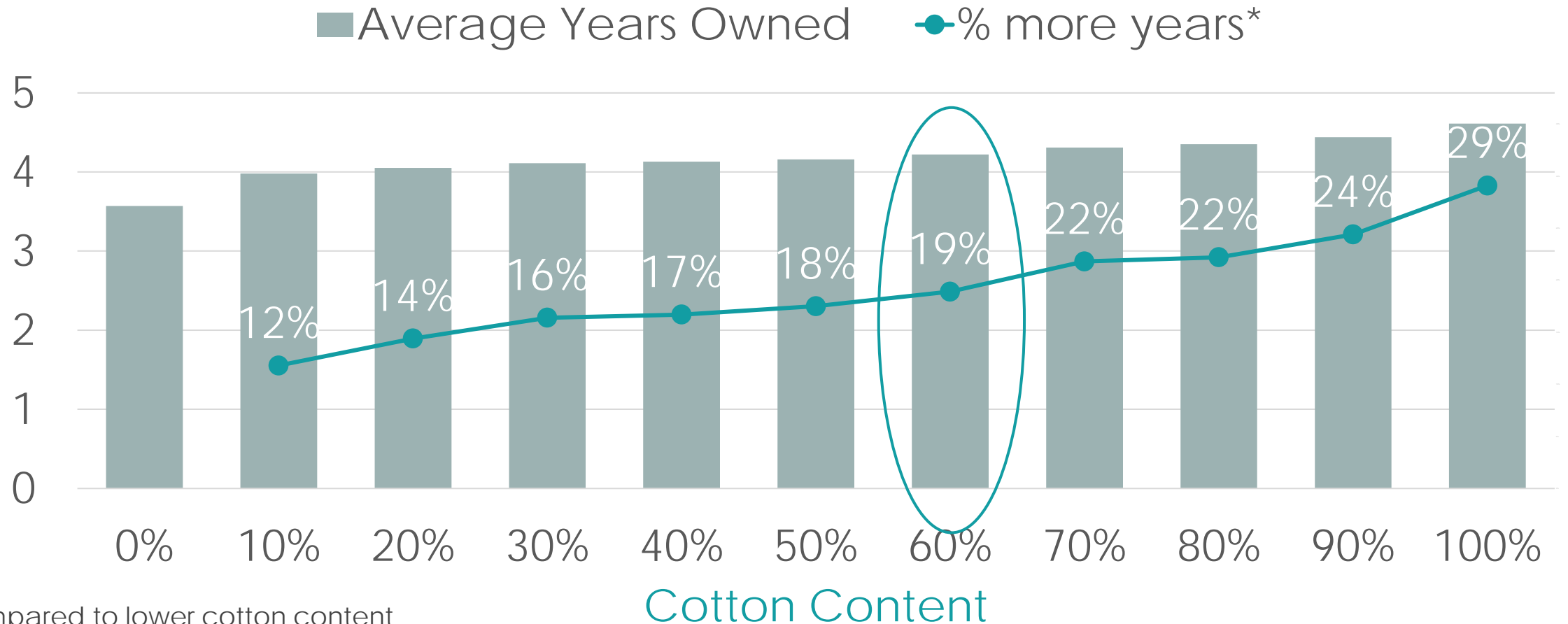
**U.S.**

**China**

**51**  
garments

# Longer Life With Cotton

All countries



\*Compared to lower cotton content

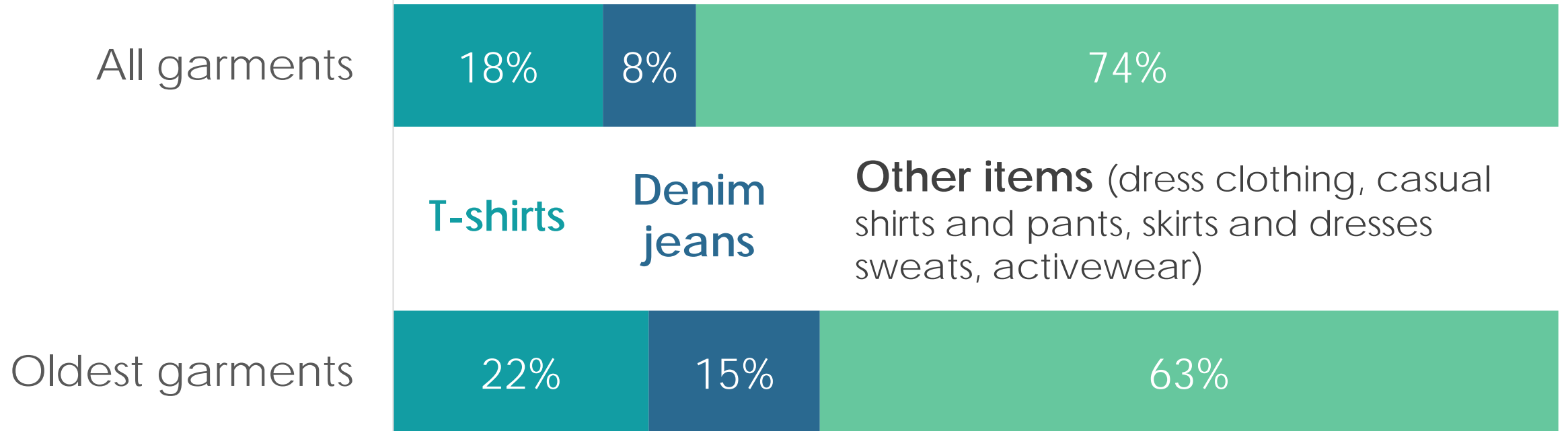
Source: CCI & Cotton Incorporated's 2020 Global Durability Study



# Oldest Item in the Closet: U.S.

Denim jeans have a long life in consumer closets

*Closet allocation by garment type:*





# Oldest Item in the Closet: U.S.

Older items contain more cotton



T-shirts

Years  
owned

7.3

Cotton  
content

75%



Denim jeans

5.7

60%



Other garments

5.4

44%



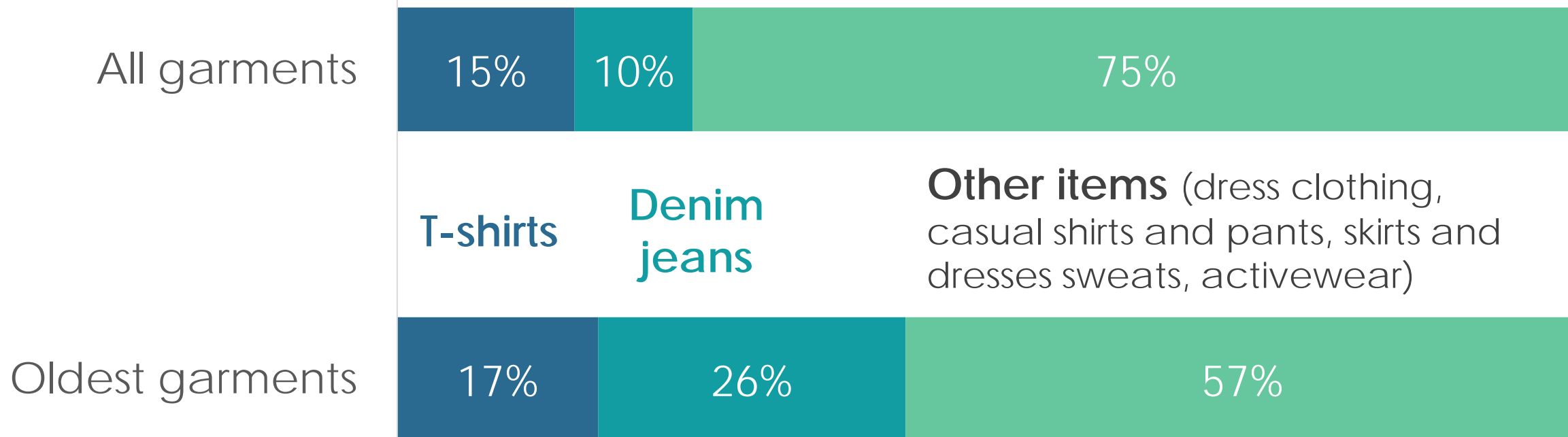




# Oldest Item in the Closet: China

Denim jeans have a long life in consumer closets

*Closet allocation by garment type:*





# Oldest Item in the Closet: China

Older items contain more cotton



T-shirts

Years  
owned

3.2

Cotton  
content

48%



Denim jeans

3.2

44%



Other garments

2.7

34%

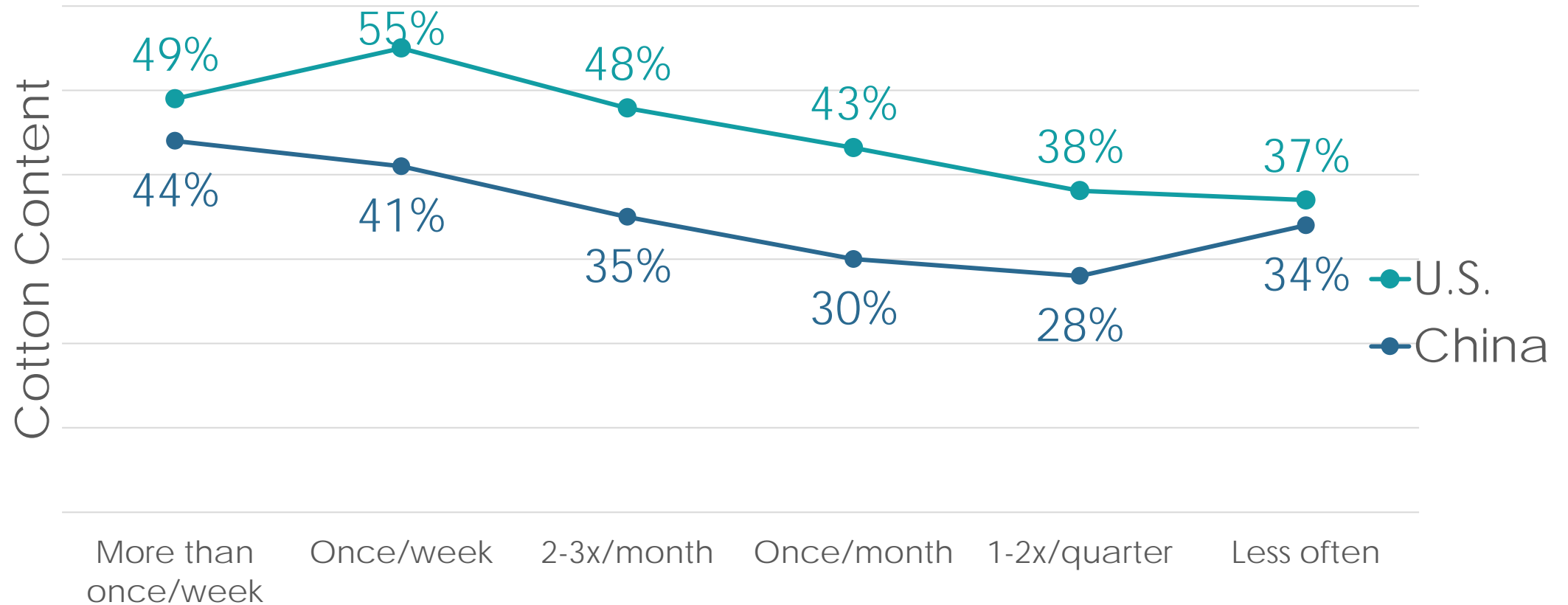




# More Wears With Cotton

Clothes with more cotton are worn often

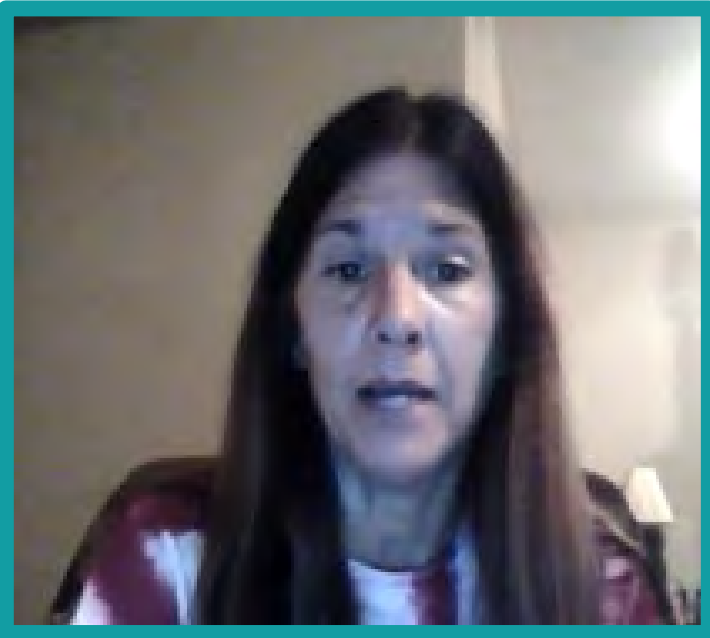
*Average cotton content by how often garments are worn:*





# More Wears With Cotton

Clothes with more cotton are worn often



*"Because you don't go out of the house, so I've been wearing a lot of my 'round the house' clothes. What I have on now is of course 100% cotton, and then I have on 100% cotton shorts. Everything I wear around here usually is cotton, because it's most comfortable."*



# Extending the Life of Clothing: U.S.

Consumers take special care to help clothing last longer



49%

Wash in cold  
water



39%

Hang dry



35%

Wash on  
delicate cycle



33%

Stain treat



29%

Mend  
holes/tears



29%

Wear less often



28%

Wash less  
often



26%

Hand wash



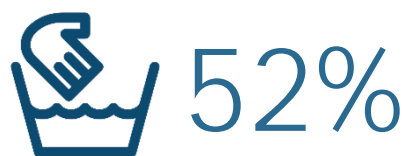


# Extending the Life of Clothing: China

Consumers take special care to help clothing last longer



Wash on  
delicate cycle



Hand wash



Hang dry



Stain treat



Avoid activities that  
may cause wear



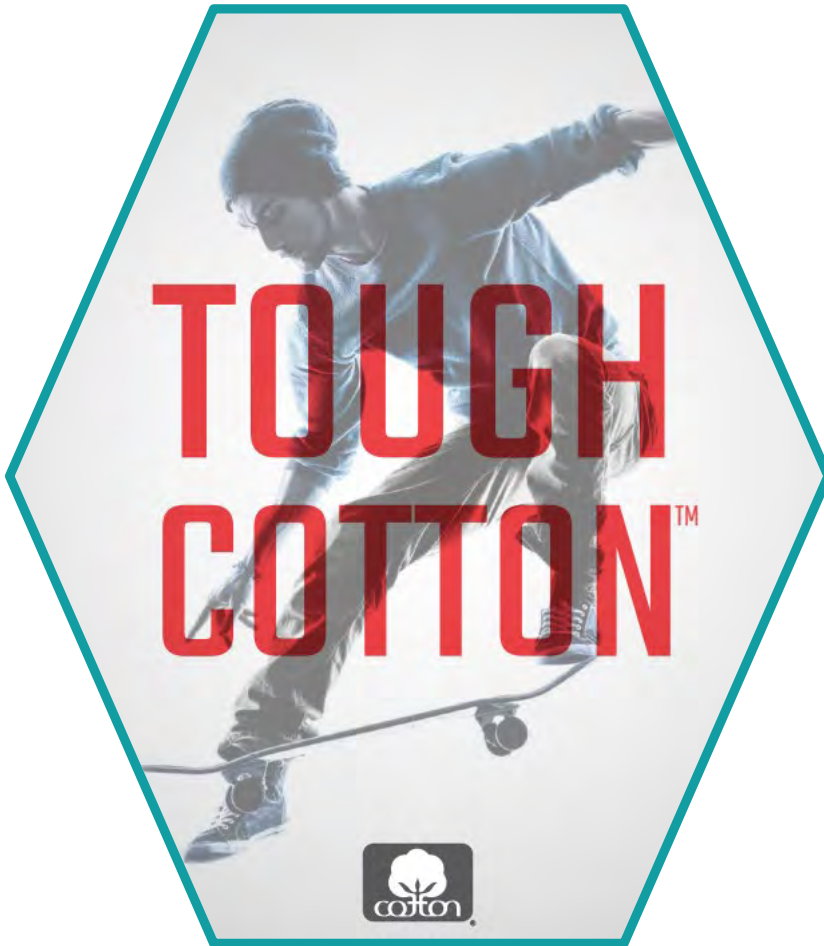
Mend  
holes/tears



Wash less often

# TOUGH COTTON™ Technology

Cotton innovation enhances durability



Girls Tough Cotton Novelty  
Ankle Leggings

**LANDS' END**  
let's get comfy™



**DULUTH**  
TRADING

# Finding Clothing That Lasts

## Summary



Consumers expect clothing to last longer

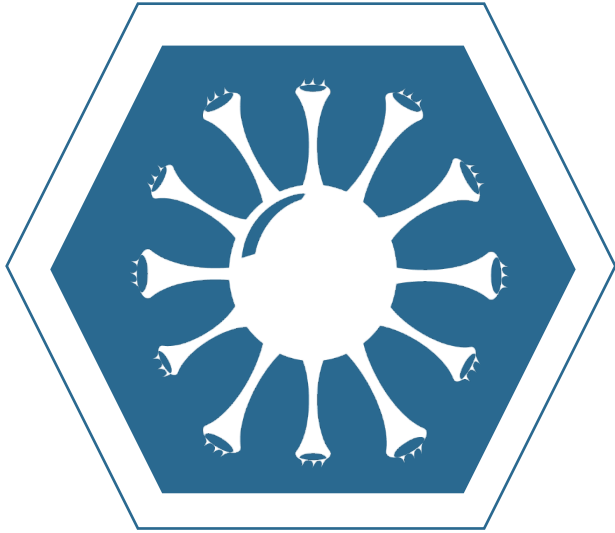


Cotton-rich clothing stays in closets longer and is worn often



Consumers look to extend life with clothing care and performance technologies

# Summary



## COVID-19

Clothing shopping is bouncing back as consumers adjust



## DENIM

Emphasize fit and comfort with iconic denim jeans



## DURABILITY

Meet consumer expectations with durability enhancement



cottonworks™

# Consumers & Clothes: Adapting to a Changing World

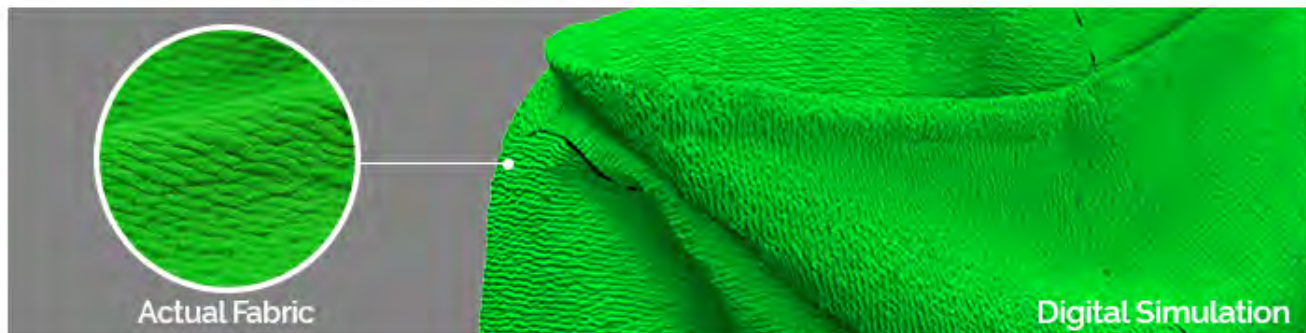


NEW FEATURE

# Digital Fabric Downloads

Create and iterate products with ease, make decisions faster, and dramatically reduce wasted samples – now with the natural inspiration of cotton.

CottonWorks™ is excited to offer a [growing collection](#) of CLO and Browzwear compatible fabric files for download. CottonWorks™ users are now able to take garment design to the next level through downloadable digital fabric files across a variety of constructions.



While the current collection is limited to a curated selection of 3D materials, more downloadable files will become available soon. Keep an eye on your inbox for future releases and even more digital innovation!

View CLO Fabrics



View Browzwear Fabrics



## Digital Cotton Fabrics

Learn more at  
[cottonworks.com/resources/fabricast](https://cottonworks.com/resources/fabricast).



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Apparel Sourcing

Global Market for Baby  
Care Today & Tomorrow

The Tariff Dispute & the  
Cotton Supply Chain

Turning the Tides:  
Tackling Our Ocean's  
Plastic Pollution  
Problem

Breaking it Down:  
Cotton's  
Biodegradability in  
Aquatic Environments

Breaking it Down:  
Cotton's  
Biodegradability in  
Various Environments

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presentation prior to exiting the webinar.