



# Emerging Consumers:

## Back-to-School Buying Behaviors Post-Pandemic



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Emerging Consumers:

Back-to-School Buying Behaviors Post-Pandemic

# Today's Speakers



**Jon Devine**

Senior Economist  
Corporate Strategy & Insights



Cotton  
Incorporated



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Cotton  
Incorporated





Type your questions using the Q&A feature at any time during the webinar.



A recording of this webinar will be available on **cottonworks.com**.

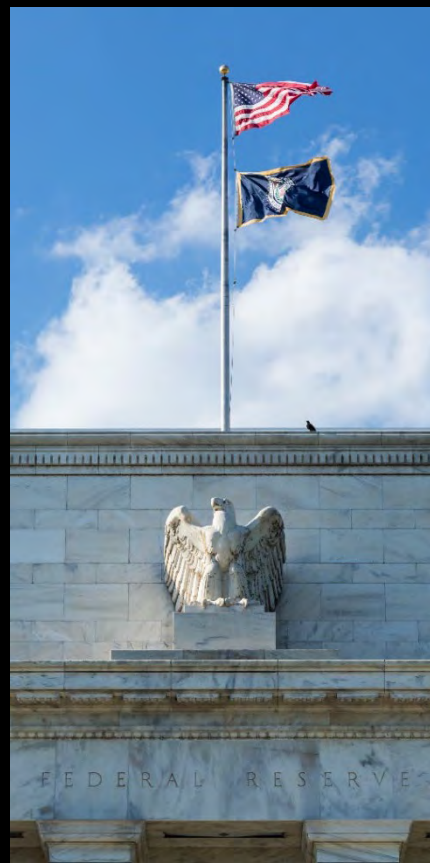
# Webinar Support



# Economic Update

Pandemic brought unprecedented change





# This Time was Different

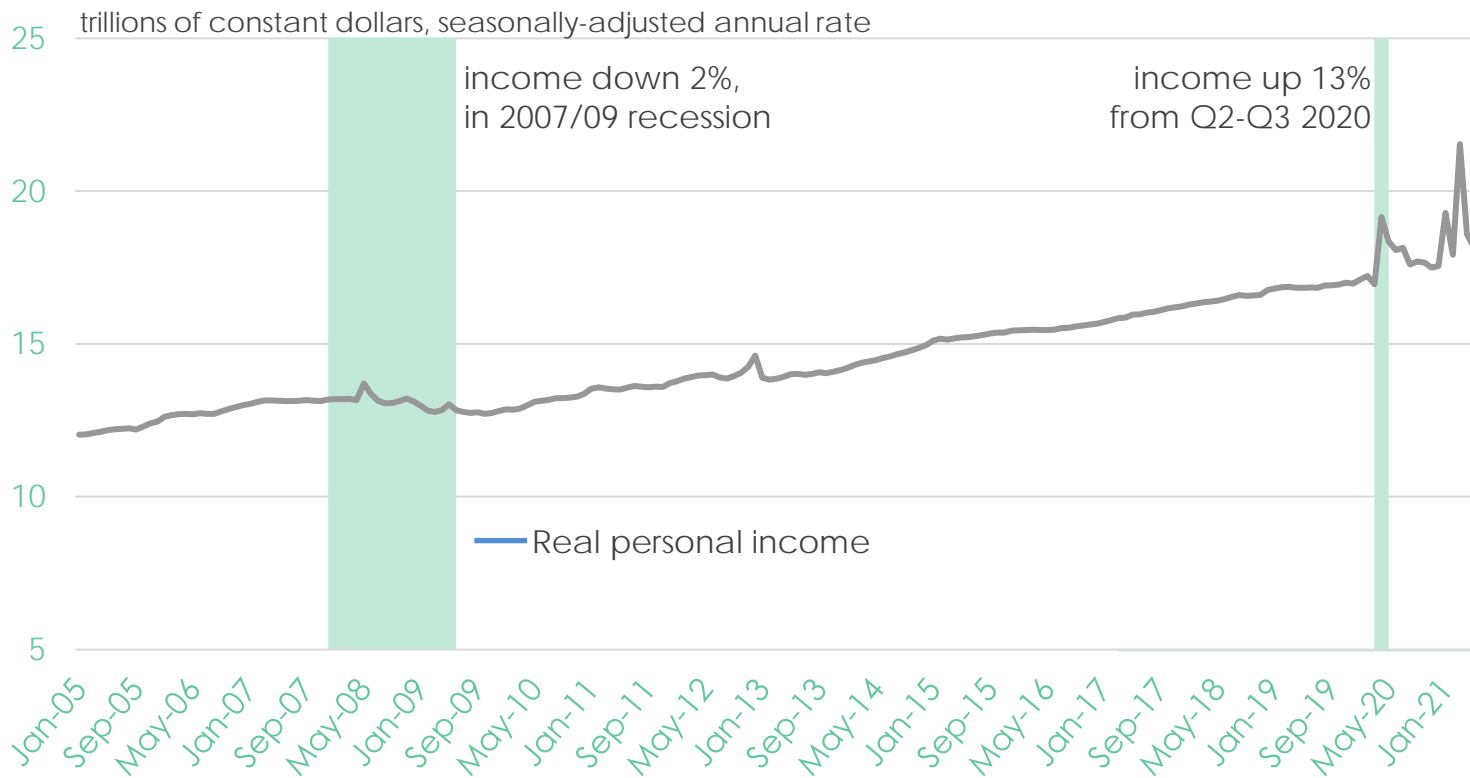
Record decline in GDP  
in Q2 2020 (-31%)

Record increase in GDP  
in Q3 2020 (+33%)

Record stimulus

# Incomes Climbed

Record stimulus supported consumers

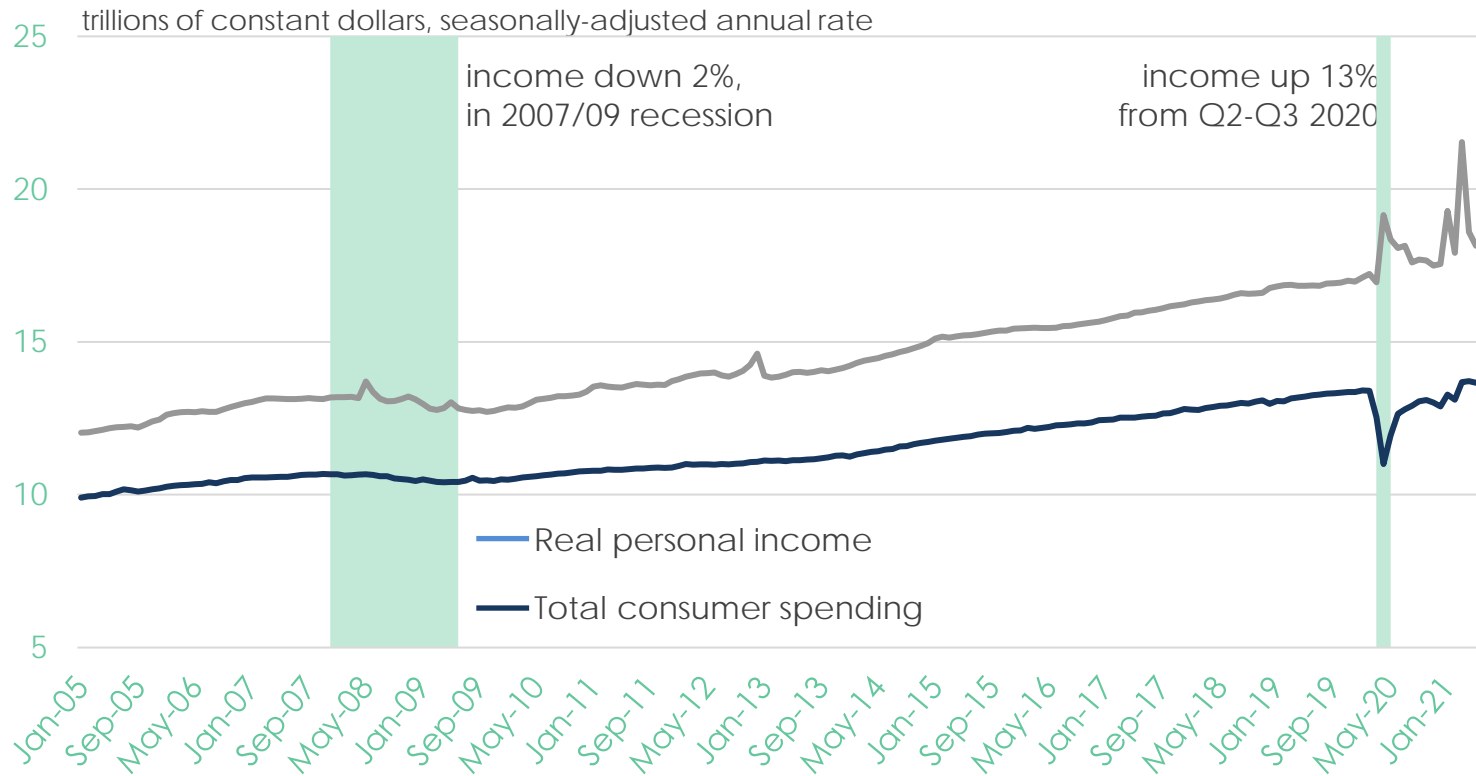


Sources: US Bureau of Economic Analysis, Federal Reserve Bank of St. Louis



# Incomes Climbed, Spending Fell

Savings increased

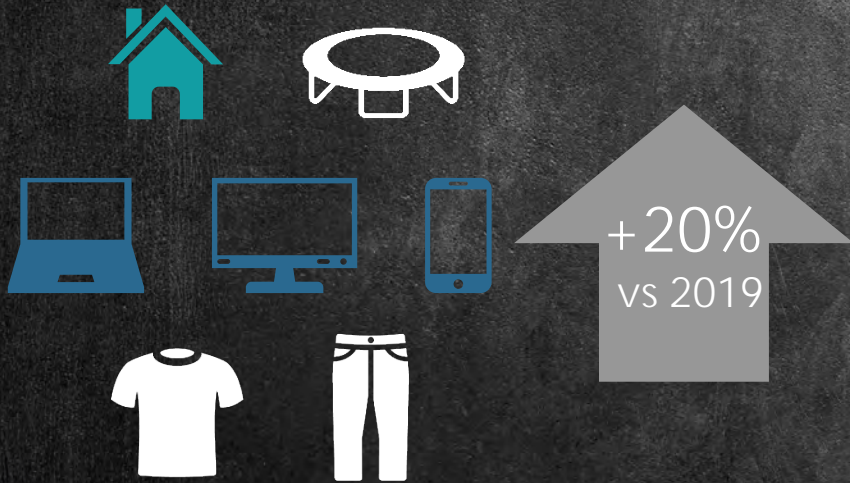


Sources: US Bureau of Economic Analysis, Federal Reserve Bank of St. Louis

# Divergence in Spending

Consumers bought more goods while services were unavailable

## Goods



## Services



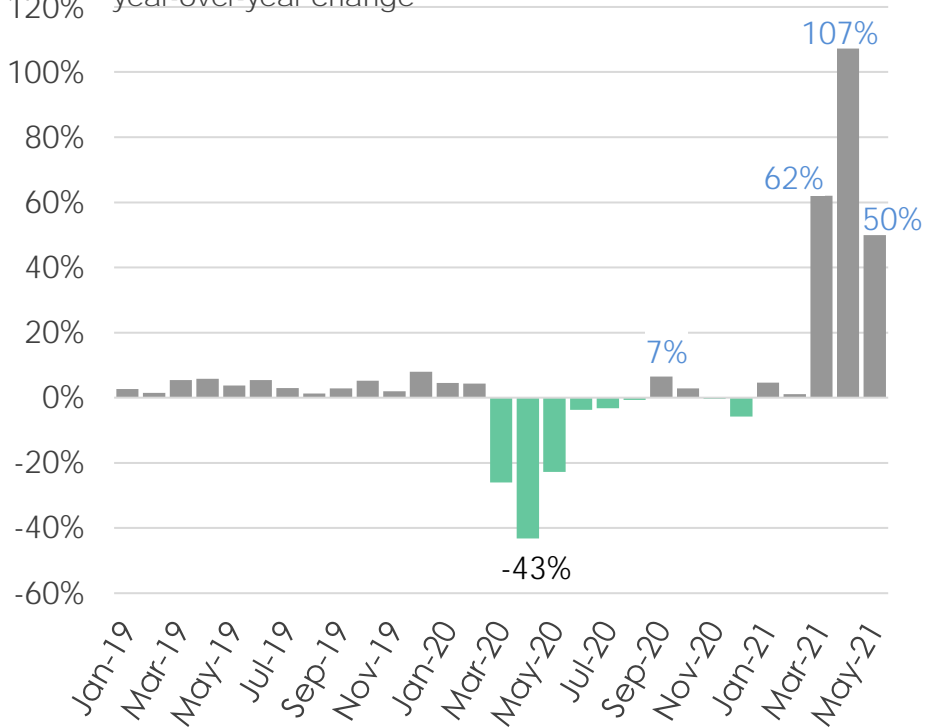


# Clothing Spending

COVID brought growth

## Consumer Spending on Clothing

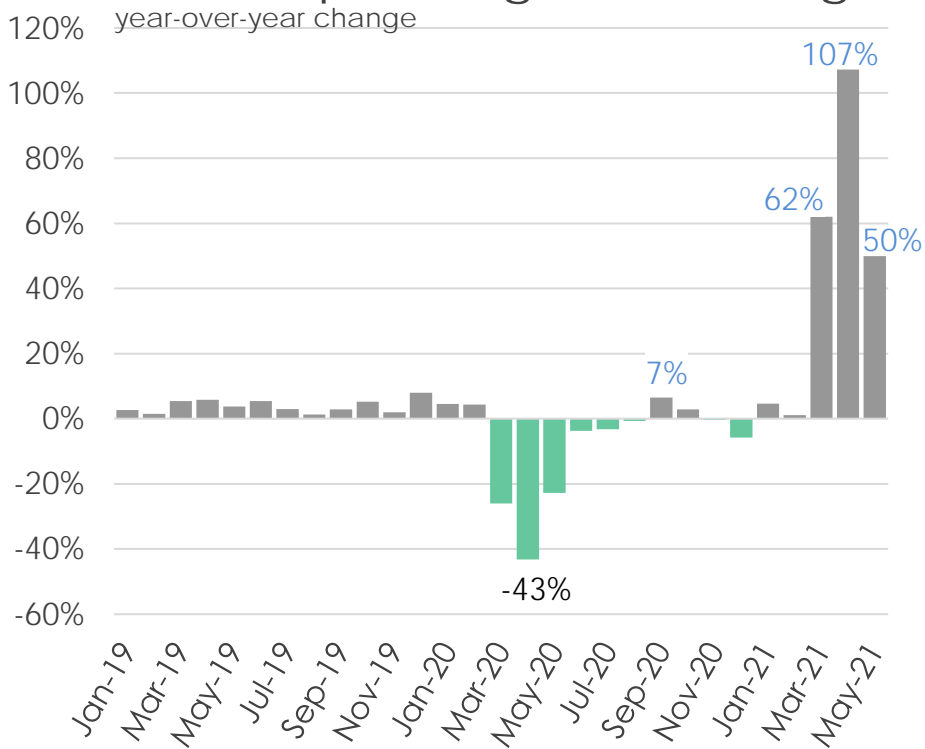
120% year-over-year change



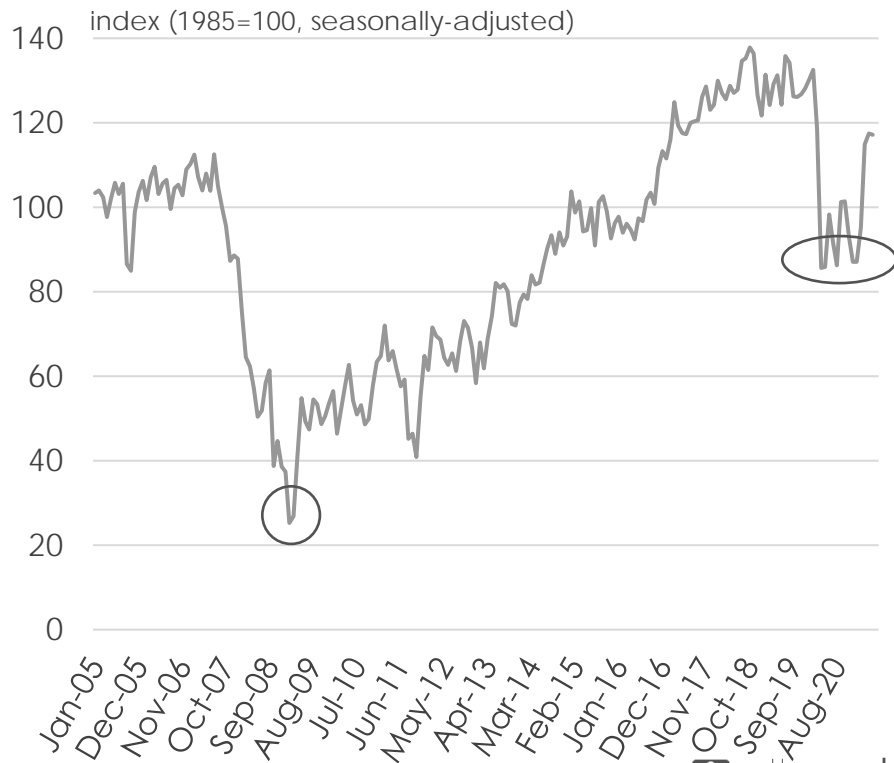
# Clothing Spending & Confidence

Despite volatility, confidence held up well during the pandemic

## Consumer Spending on Clothing



## Index of Consumer Confidence





# Supportive Environment

Macro conditions could boost back-to-school



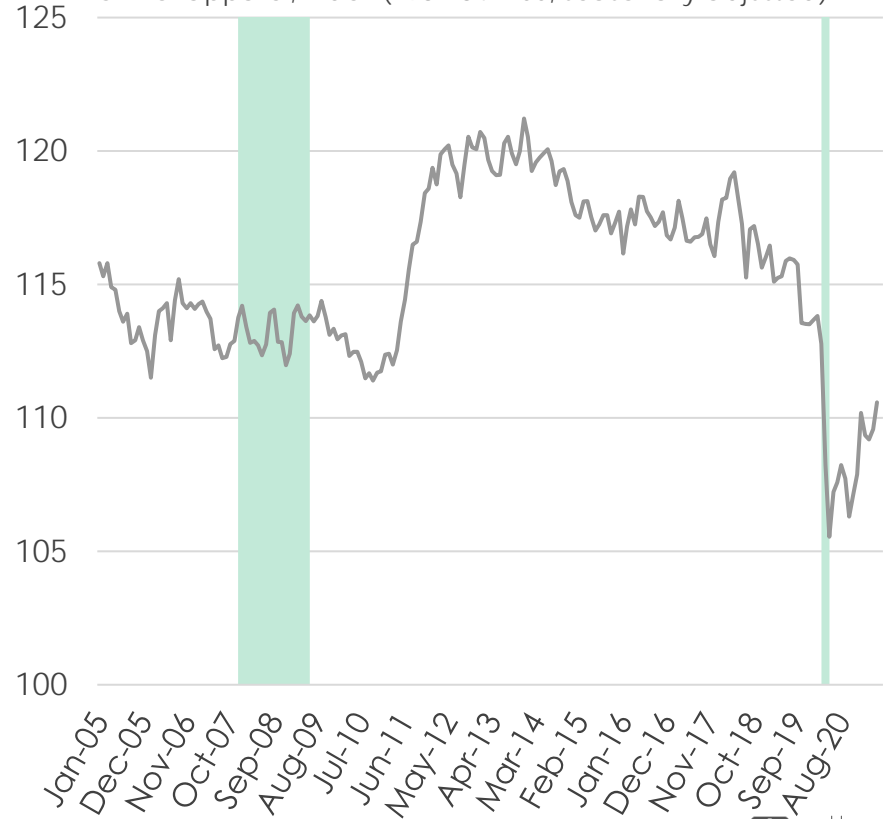
Consumers are positive



Clothing prices are down

## Retail Apparel Prices

CPI for apparel, index (1982-84=100, seasonally-adjusted)



# Supportive Environment

Macro conditions could boost back-to-school



Consumers are positive



Clothing prices are down



Savings have been building



Labor market is tightening



Vaccinations versus variants







«LogoType»

*Back to School*

TAKING NOTES:  
BACK-TO-SCHOOL SHOPPING INTENTIONS



# CONSUMER INSIGHTS

## Back to School





# Taking Notes:

## Back-to-School Shopping Intentions

1

COVID CONCERN

2

GOING BACK TO CLASS

3

SHOPPING LISTS

4

WHERE TO SHOP

# COVID-19 CONCERN

Concern still high, especially among parents

*Percentage of U.S. consumers  
who are very concerned about  
the COVID-19 pandemic:*

58%

62%

58%

65%

64%

59%

54%

MAR

APR

SEPT

NOV

DEC

MAR

MAY



# COVID-19 CONCERN

Concerns among parents versus non-parents



Parent | Non-Parent

Very Concerned  
about COVID

60%

49%

Feel Safe to  
Resume Activities

61%

44%

Fully Vaccinated

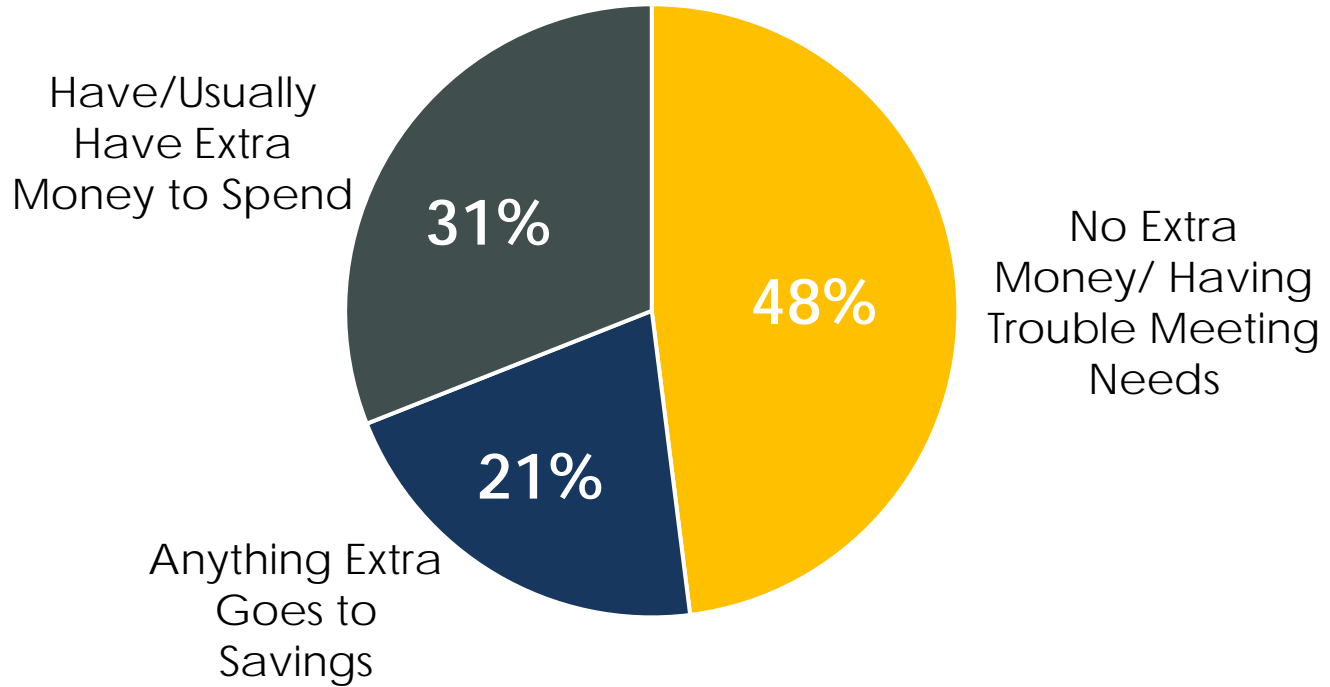
60%

51%

Source: Cotton Incorporated's Coronavirus Response Consumer Surveys, May Wave 6



# Parents Describe Personal Finances



Source: Cotton Incorporated's Coronavirus Response Consumer Survey, Wave 6 May

# Current 21/22 School Year Plans



58%  
In-person



9%  
Virtual



14%  
Hybrid



19%  
No plans  
Announced



# Plan to Purchase

89% Clothes

80% Shoes

77% Supplies

30% Accessories

39% Electronics

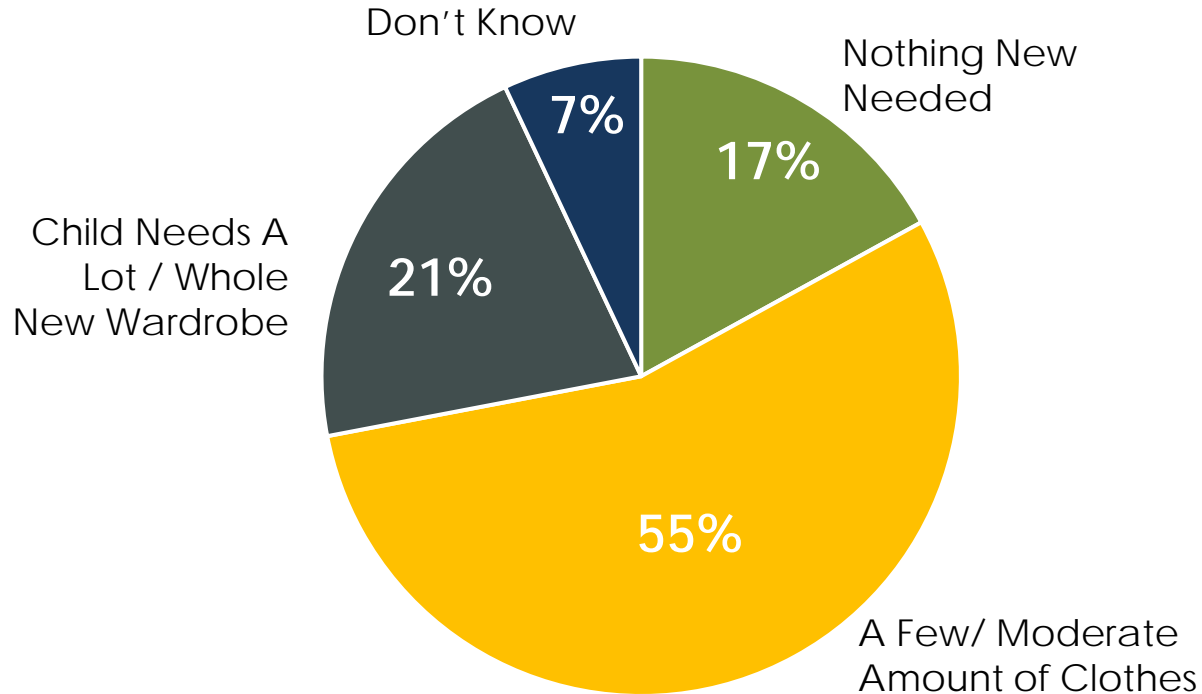
18% Sporting Equipment





# Current Clothing Needs

How much clothing do children need for back-to-school?



Source: Cotton Incorporated's Back to School Consumer Survey June 2021

# Uncertainty Keeps Some Parents From Buying Now

*Why parents plan not to buy Back-to-School clothes?*

- I plan to homeschool (29%)
- I am unsure of my child's school schedule for the fall (27%)
- My kids will wear what I bought last year (27%)
- I am waiting for good back-to-school sales (27%)
- I am waiting to see whether stores near me reopen (26%)
- My kids do not need new clothes until the weather changes (25%)
- I need to save money and will not buy this year (24%)



# Those Buying Clothes Plan to Spend More This Year



Source: Cotton Incorporated's 2021 *Lifestyle Monitor™* Survey



# Different Clothes Needed for In-Person Class

How will parents shop differently for in-person classes?

41% Comfortable clothes that look presentable

28% Clothing made for comfort/ athleisure

23% Trendy styles

18% Classic styles

18% Activewear

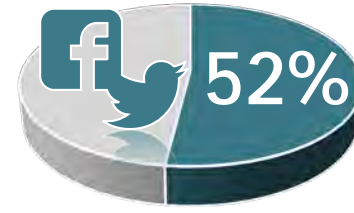
*“I want something that looks cool, but is comfortable for school.” – 14 year old*

# Influences Clothing Choices



## Parents

- **What already owns/likes (48%)**
- School Policies (28%)
- Store Displays (22%)
- Child's Friends (21%)
- Social Media (20%)
- T.V./ Brand or Retailer Websites (15%)

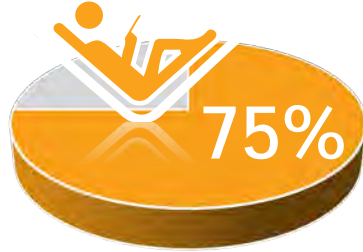


## Teens

- **Social Media (52%)**
- Friends (51%)
- Already Own (48%)
- Celebrities (27%)
- Family (25%)
- School Policy (23%)



# Features Shoppers Look For



## Parents

- **Comfort (75%)**
- Quality (67%)
- Durability (62%)
- Functional (33%)
- Trendy (27%)
- Classic (24%)



## Teens

- **Comfort (68%)**
- Quality (54%)
- Trendy (49%)
- Durability (41%)
- Functional (38%)
- Classic (37%)

Source: Cotton Incorporated's 2021 Lifestyle Monitor™ Survey

# Comfortable Clothing Makes Us Feel Better

% of consumers who say:

87%

Comfortable clothing makes me feel better mentally and emotionally.

88%

I prefer my children be dressed in cotton clothes.

83%

Prefer cotton for children because it is comfortable (soft-67%, feels good-65%, natural-52%).



Source: Cotton Incorporated's 2021 Sustainability & Health and Wellness survey, Cotton Incorporated's 2021 *Lifestyle Monitor™* Survey

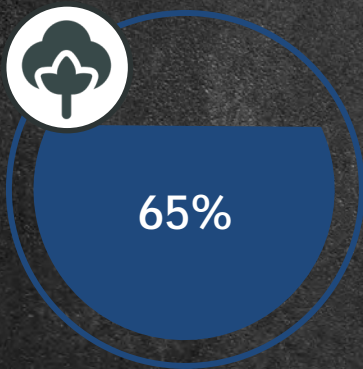


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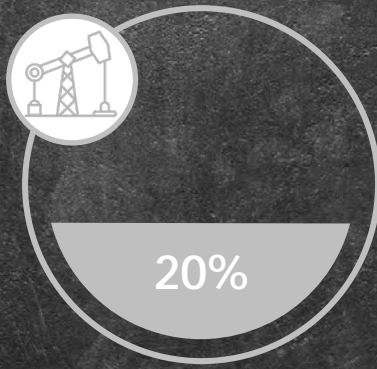


# Which Fiber Do Consumers Equate with Attributes They Seek?

Consumers agree that cotton is the most comfortable, longest lasting, and best quality fiber for their clothing



Cotton  
Clothing

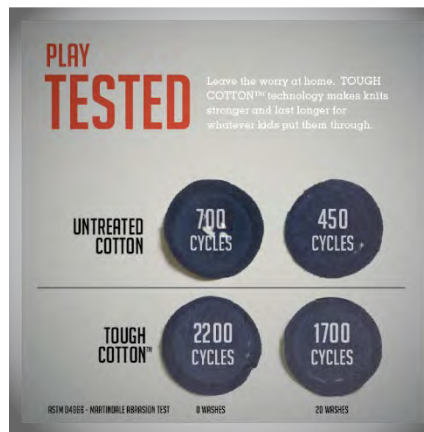
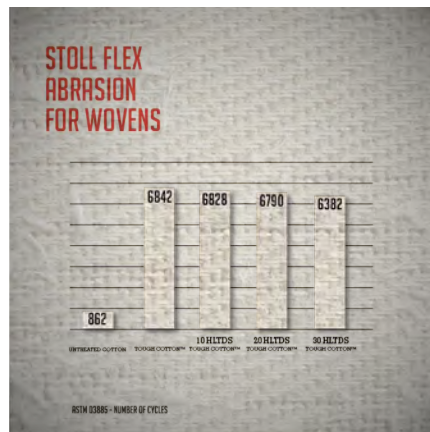


Polyester  
Clothing



Rayon/Tencel™  
Clothing

# Cotton Technologies: TOUGH COTTON™



## TOUGH COTTON™ TECHNOLOGY

Consumers already know cotton for its quality and durability. That's nothing new. Now, the long-lasting comfort of cotton is even better. Cotton can withstand even the toughest challenges — from falls on the playground to climbing the trail.



# What Items Do Shoppers Plan to Buy for Back-To-School?

7

- Socks
- Undergarments
- Shirts/Tops

3

- Pants
- Shorts
- Jeans
- Activewear
- Outwear

2

- Sweaters
- Leggings
- Sleepwear

1

- Dress
- Skirt
- Suit

# The Amount of Clothing Expected to Be Purchased Online vs. In Store Holds Steady



Percentage of Clothing Plan to Purchase Online and In Store

	2019	2020	2021
Physical Store	71%	56%	56%
Online	29%	44%	44%

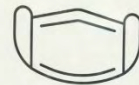


# In-Store Clothing Shopping:

What health precautions would parents like physical stores to keep in place after the pandemic is over?

- 54% Hand Sanitizer Stations
- 40% Face masks worn by all customers
- 39% Heightened sanitation of surfaces & clothing
- 38% All sales staff fully vaccinated
- 35% Extra distance between clothing racks
- 30% Limited occupancy

**REMINDER TO  
CUSTOMERS**



**Under Local Law, a Face  
Covering is Required**

**The Max  
Occupancy  
this Store**

**4**

# Where Do Parents Plan to Shop?







# Most Parents Give Clothes Away

*What parent typically does when child no longer wears clothing*

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Give away	61%
Donate to charity	48%
Save to pass down to a younger child	36%
Sell (consignment or at yard sale)	21%
Throw away	5%

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# Secondhand Clothing

43%

Buy secondhand  
clothing for their kids

28%

Say they plan to buy  
more used  
clothing since the  
pandemic

Source: Cotton Incorporated's 2021 *Lifestyle Monitor™* Survey and Cotton Incorporated's Coronavirus Response Consumer Survey, Wave 6 May

# TAKING NOTES

Back-to-School Shopping Intentions for 2021/2022 School Year



Uncertainty



Comfort



Quality  
Durability  
Value





# Back to School

TAKING NOTES:

BACK-TO-SCHOOL SHOPPING INTENTIONS