

Global Lifestyle Monitor IV – United Kingdom Report

Prepared for Cotton Council International

Prepared by Synovate

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Overall Background

Since 1998, Cotton Council International (CCI) has successfully conducted the “Eurostyle Monitor” and “Global Lifestyle Monitor,” which investigate a wide range of lifestyle issues related to clothing, shopping, and textiles. This research has been important in adding value and increasing understanding of consumer attitudes and behaviors to CCI members around the globe.

The research looks in detail at lifestyles, clothing purchasing habits, and clothing interest and attitudes. Analysis of the results helps CCI understand:

- ✓ The issues behind cotton product demand,
- ✓ What motivates consumers to choose cotton over synthetics, and
- ✓ The implications of these issues for CCI’s strategy in promoting US cotton.

In 2006, Synovate was again selected to conduct and coordinate the Global Lifestyle Monitor research for Cotton Council International.

Overall Methodology

Interviewing

Market	Methodology
Brazil	Face to face: Sao Paulo, Rio de Janeiro, Belo Horizonte, Recife, Porto Alegre
China	Telephone: Beijing, Guangzhou, Shanghai
Colombia	Face to face: Bogota, Cali, Barranquilla, Medellin
Germany	Telephone: national
Thailand	Face to face: Bangkok, Chiangmai, Chonburi, Hadyai, Korat
India	Face to face: Mumbai, Delhi, Bangalore, Kolkata, Chennai
Italy	Telephone: national
Japan	Telephone: Tokyo, Osaka
United Kingdom	Telephone: national

NOTE: Korea and Taiwan were not included in the scope of the survey in 2003 or 2006.
 Hong Kong is also not included in the scope in 2006.
 Thailand is being surveyed for the first time in 2006.



Methodology – United Kingdom

Fieldwork in the United Kingdom was conducted by Synovate from February 28th to March 20th, 2006. 500 respondents in total were surveyed via telephone interviewing.

The key respondent qualification requirement is that they purchase their own clothing. In order to maintain data consistency with the study conducted in 2003, we also set soft quotas by gender, targeting 245 males and 255 females. All respondents fall within the 15-54 age range.

This summary of results highlights major changes between the Global Monitor I conducted in 1999, Global Monitor II conducted in 2001, Global Monitor III conducted in 2003, and Global Monitor IV currently conducted in 2006.

Store Examples Used During Interviewing:

- Department stores (e.g., Debenham's, House of Fraser)
- Chain stores (e.g., M&S, BHS)
- Hypermarkets/Warehouse Clubs (e.g., Asda, Sainsbury's)
- Chain/Specialty shops outside of department stores (e.g., Benetton, The Gap, Next)
- Off-price/Discount stores (e.g., T.K. Maxx, Matalan)
- Sports/Sporting good stores (JJB)
- Catalogs/mail order (e.g., Kay's, Gus)

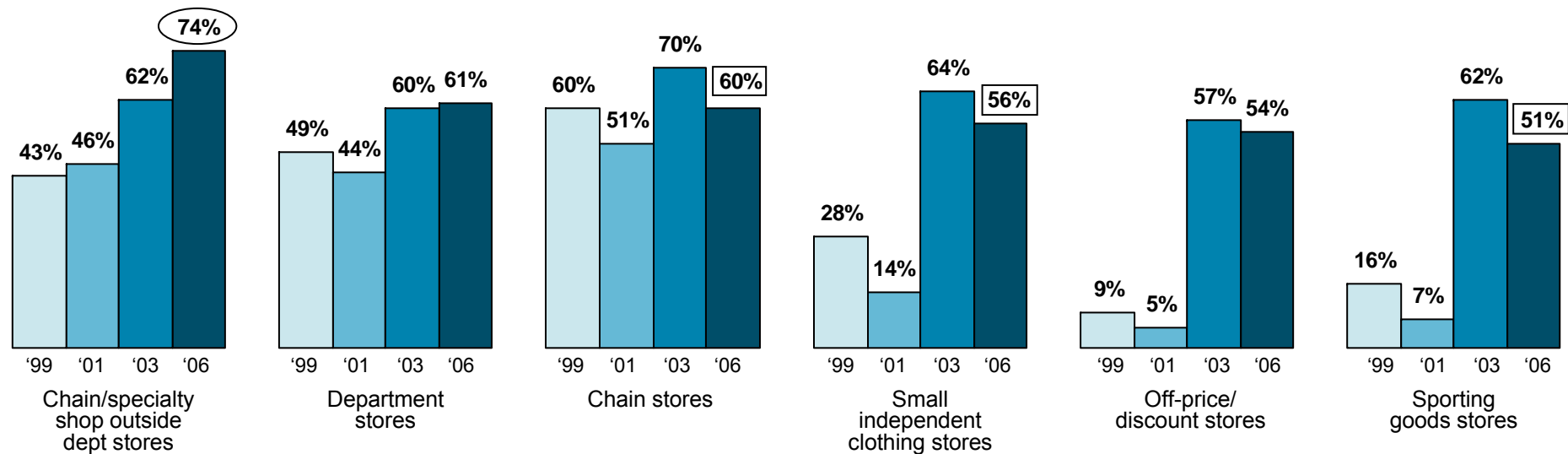
Base: Total Respondents: 1999 (n=500); 2001 (n=500); 2003 (n=500); 2006 (n=500)

Shopping and Fashion – United Kingdom

Shopping and Fashion - United Kingdom

The landscape of the key locations for current clothes purchases has changed since 2003. Chain stores, small/independent clothing stores, and chain/specialty shops remain popular; however, they have seen a significant decrease in usage. When buying clothes for themselves, chain/specialty shops are the dominant source for respondents in the UK.

Stores And Places Used To Buy Clothes For Yourself

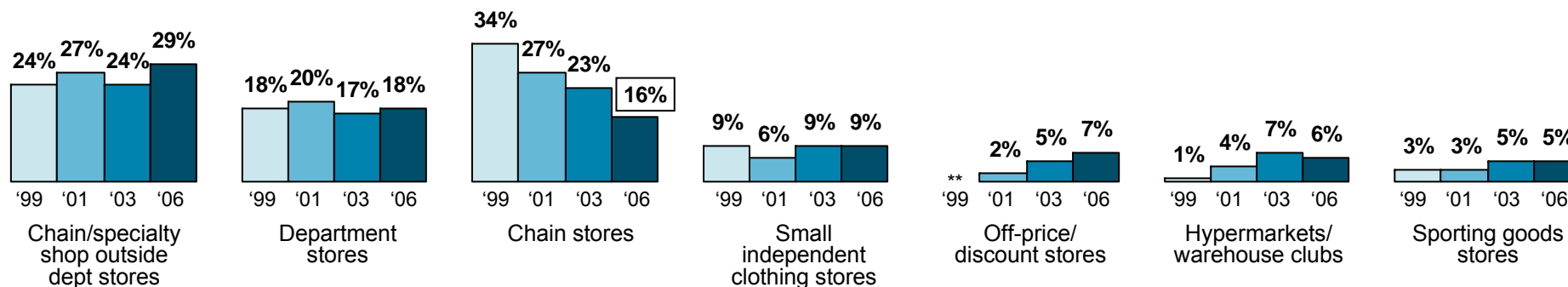


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

Chain/specialty shops, department stores, and chain stores remain the predominant store types of choice. However, there has been a continuous shift away from chain stores as a source most often used to buy clothes.

Stores and Places Used To Buy Most Of Your Clothes



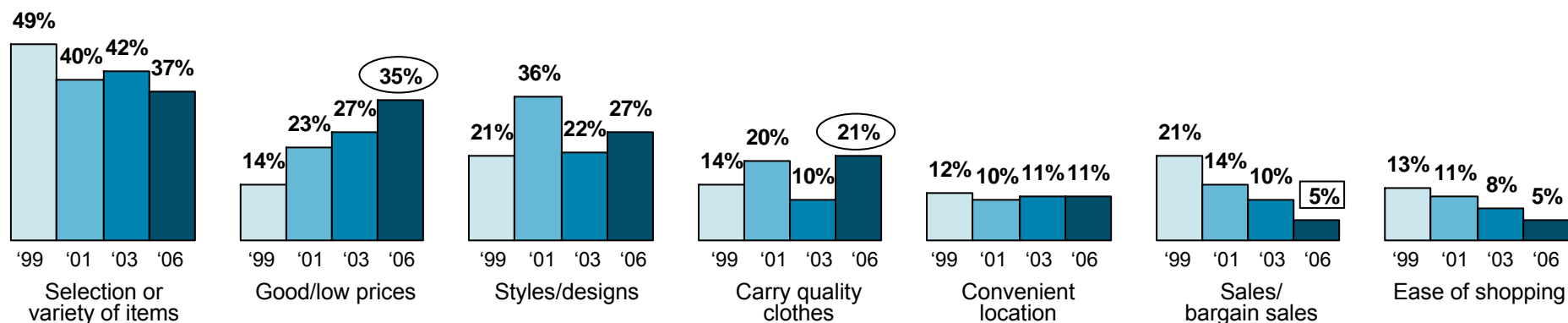
** Less than 0.5%

□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

The selection and variety of items available continues to be the main reasons for liking a particular clothing store. Good/low prices and styles are also major considerations, while carrying quality clothes has seen a significant increase in importance.

Clothing Store Attributes



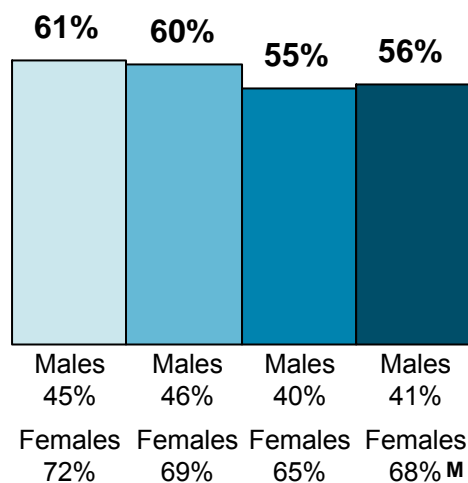
○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

UK consumer attitudes toward shopping are relatively unchanged with a majority claiming to love/like shopping for clothes. Significantly more women than men fit this category.

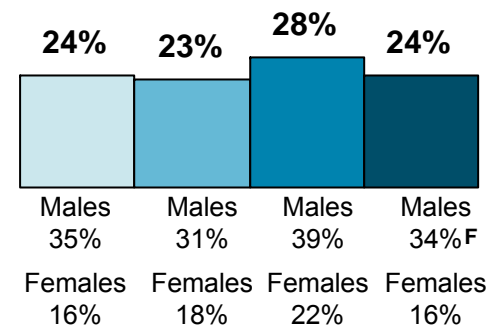
Love/Somewhat Like Clothes Shopping

1999 2001 2003 2006



Neither Like Nor Dislike

1999 2001 2003 2006



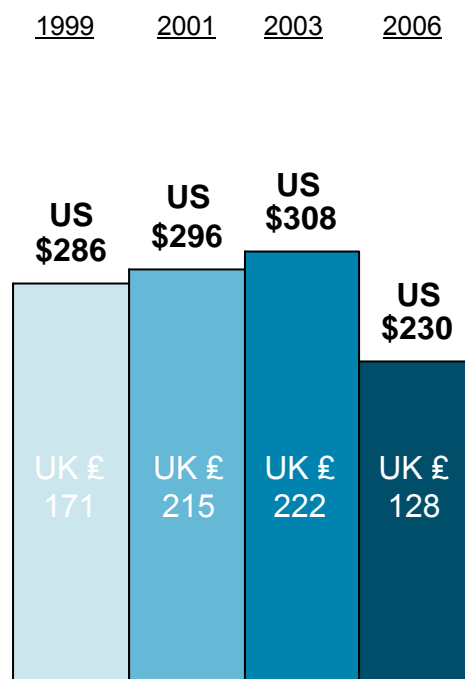
^F Significantly higher than women at the 95% confidence level

^M Significantly higher than men at the 95% confidence level

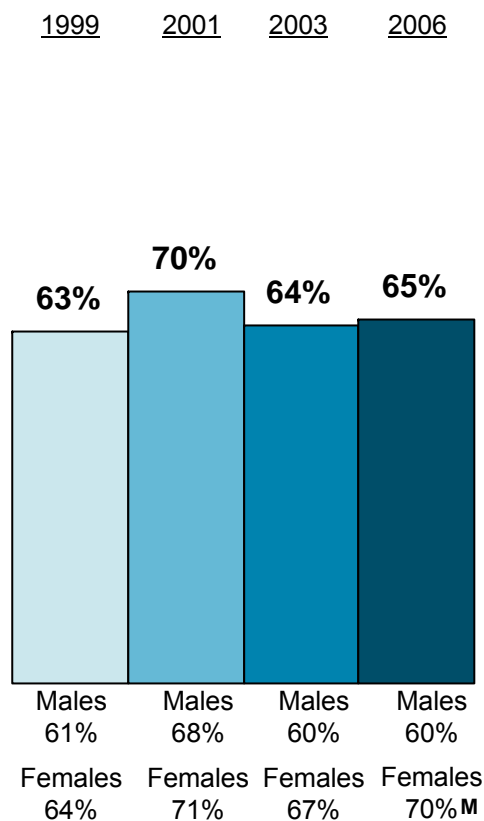
Shopping and Fashion - United Kingdom

Over a three month period in 2006, UK shoppers spent significantly less on clothes than during the same three month period measured in 2003. The percentage who buy clothes at least once a month remained static.

Average Spent on Clothes In Past 3 Months



Buy Clothes At Least Once A Month

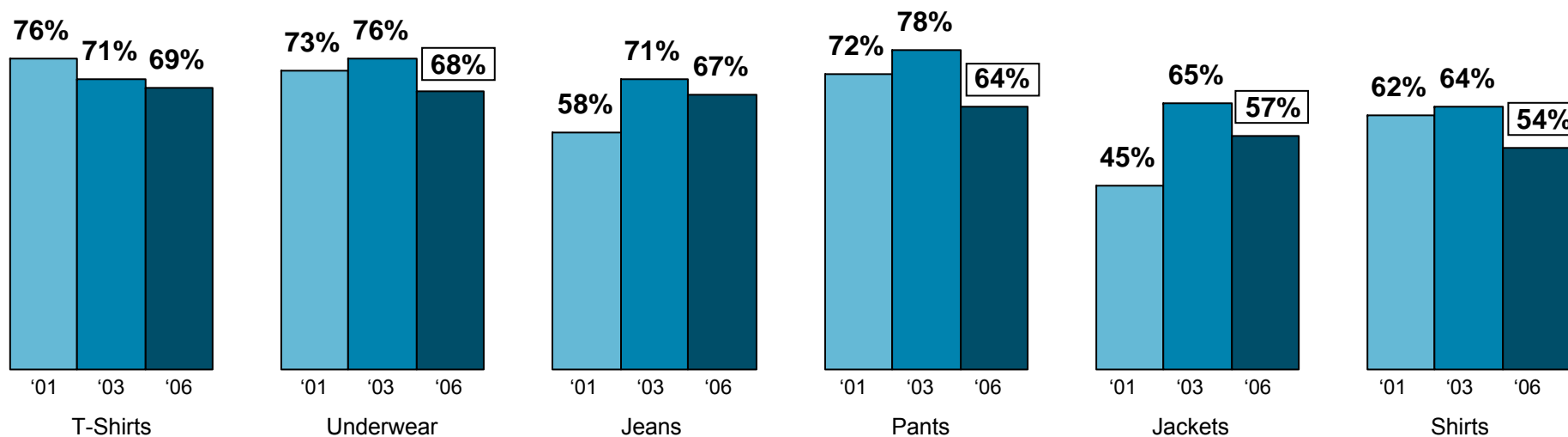


^M Significantly higher than men at the 95% confidence level

Shopping and Fashion - United Kingdom

The decline in spending is having an influence on the specific items purchased. UK consumers are spending less on underwear, pants, jackets, and shirts.

Top Items Purchased In Past Three Months*



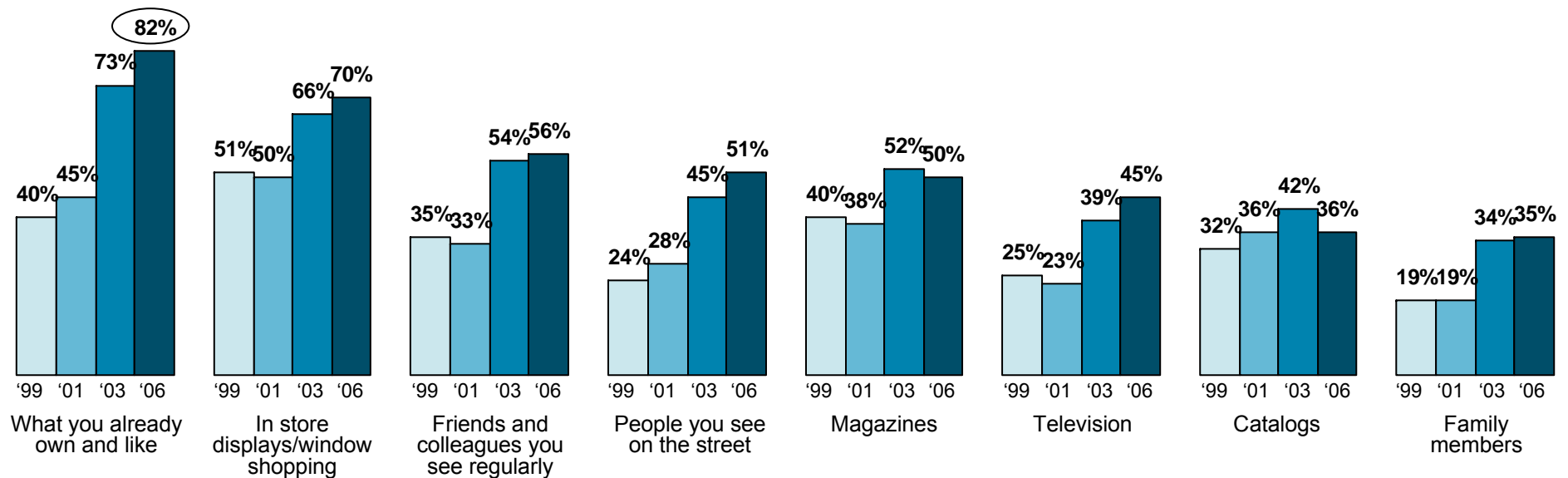
* Question not asked in GLM I - 1999

□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

Sources of inspiration for fashion among shoppers varies significantly in the UK. There has been a marked increase in the percentage who rely on what they already own and like and remain dependent on in-store displays and window shopping to keep up with trends.

Place Where Consumers Get Ideas For Clothes

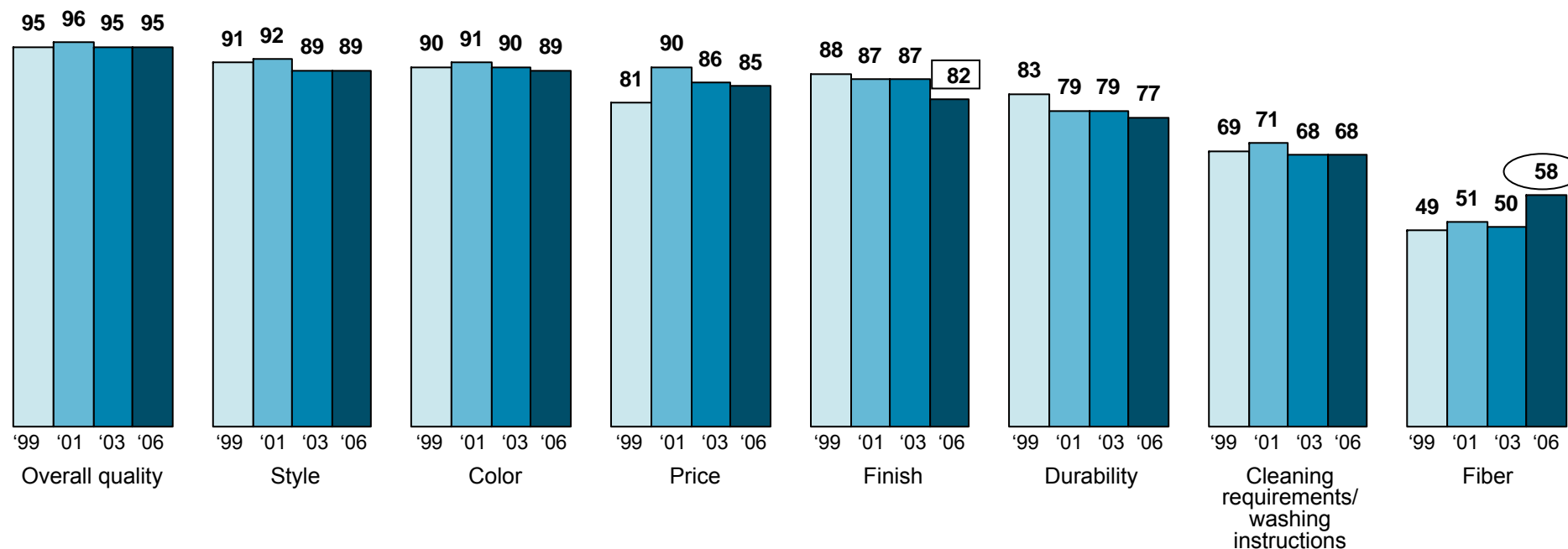


○ Significantly higher than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

Similar to three years ago, UK consumers ranked many attributes as extremely important to know prior to purchasing clothing. To CCI's benefit, fiber has become more important.

Attributes (in %)

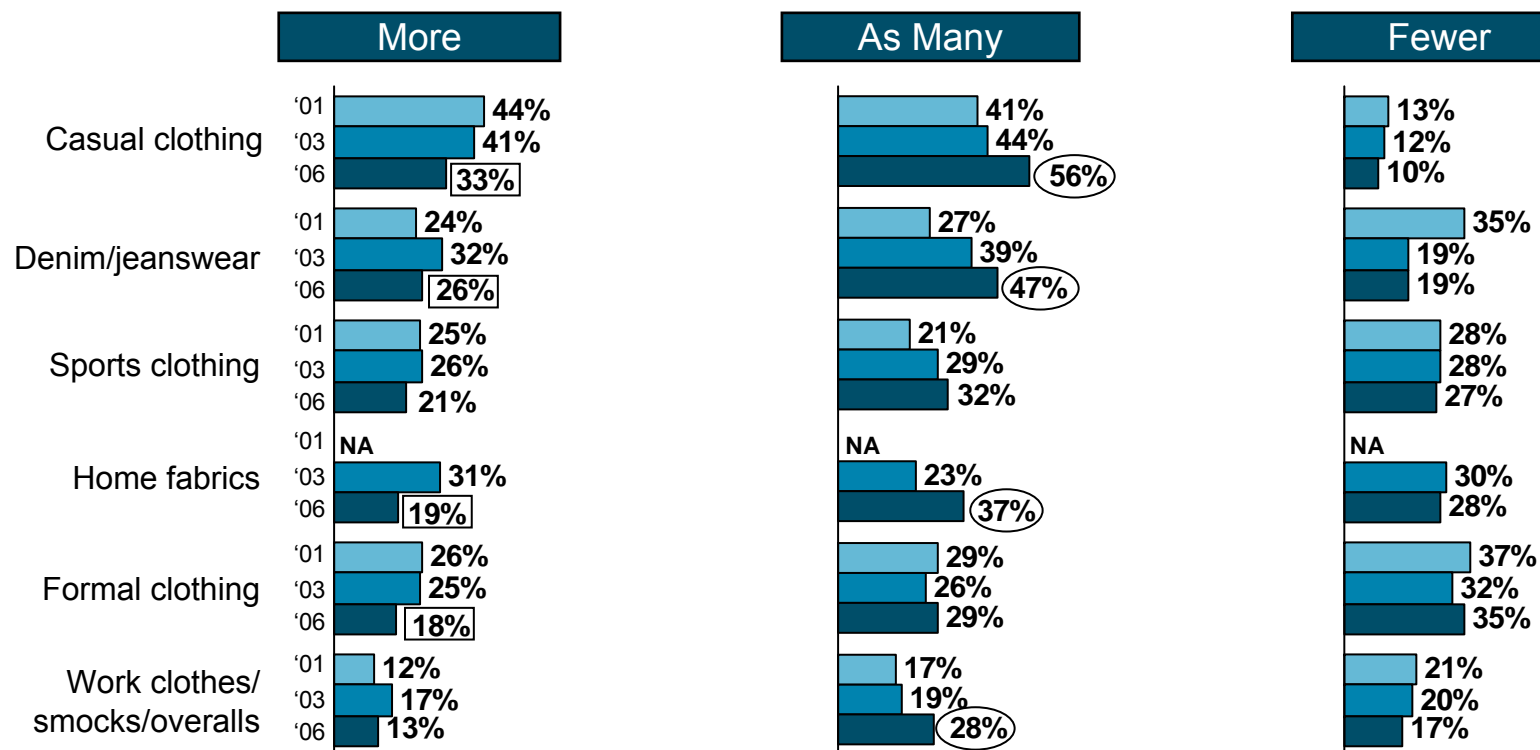


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - United Kingdom

A large percentage of UK consumers claim that they will continue purchasing habits similar to those of the past 12 months. There is a decline among those who intend to purchase more clothing in the future.

Intent to Purchase More/As Many/Fewer Clothing Items Than in Past 12 Months*



○ Significantly higher than GLM III at the 95% confidence level

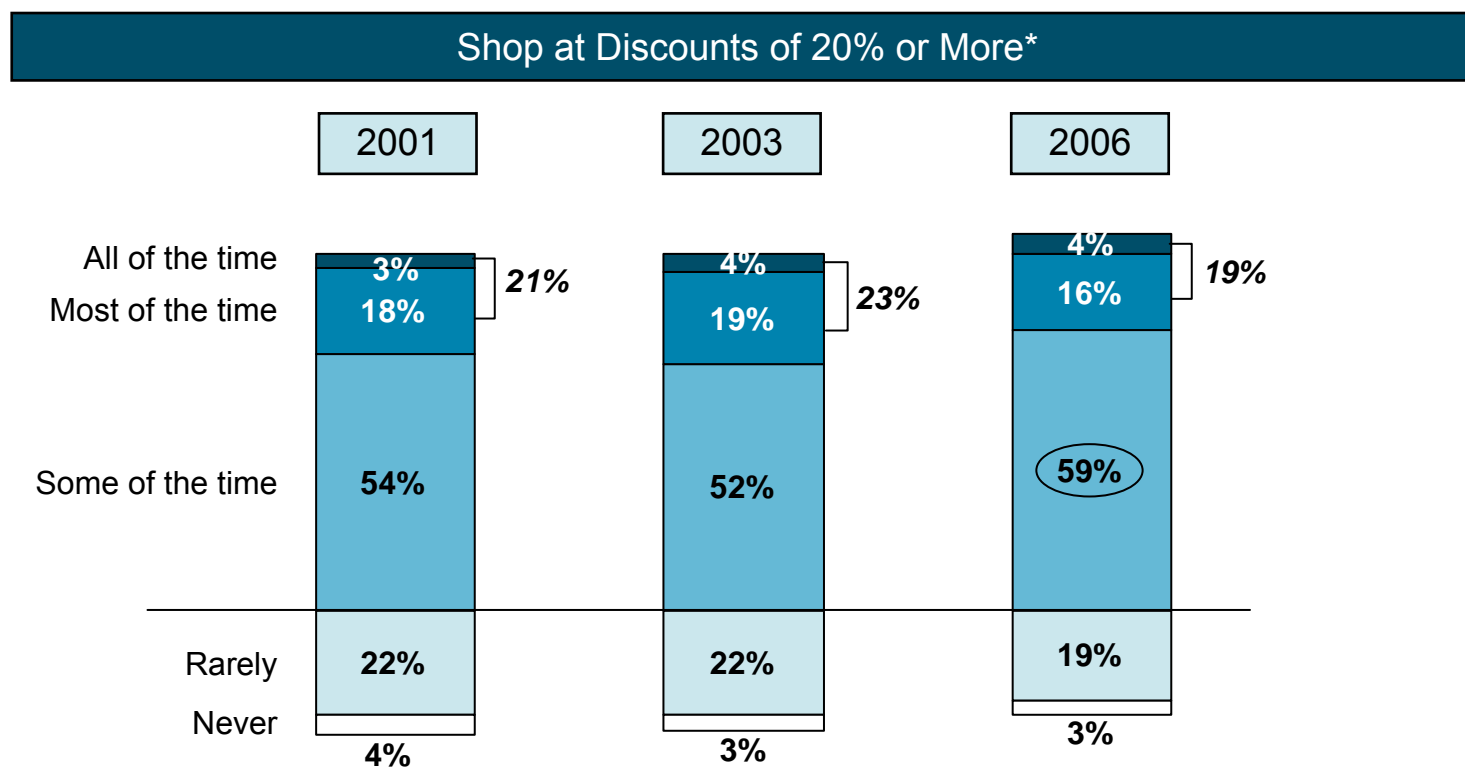
□ Significantly lower than GLM III at the 95% confidence level

* Question not asked in GLM I-1999

NA Not asked

Shopping and Fashion - United Kingdom

Less than one-fifth of all respondents buy discount clothing all of the time/most of the time. The majority buy clothing at discounts some of the time.



* Question not asked in GLM I - 1999

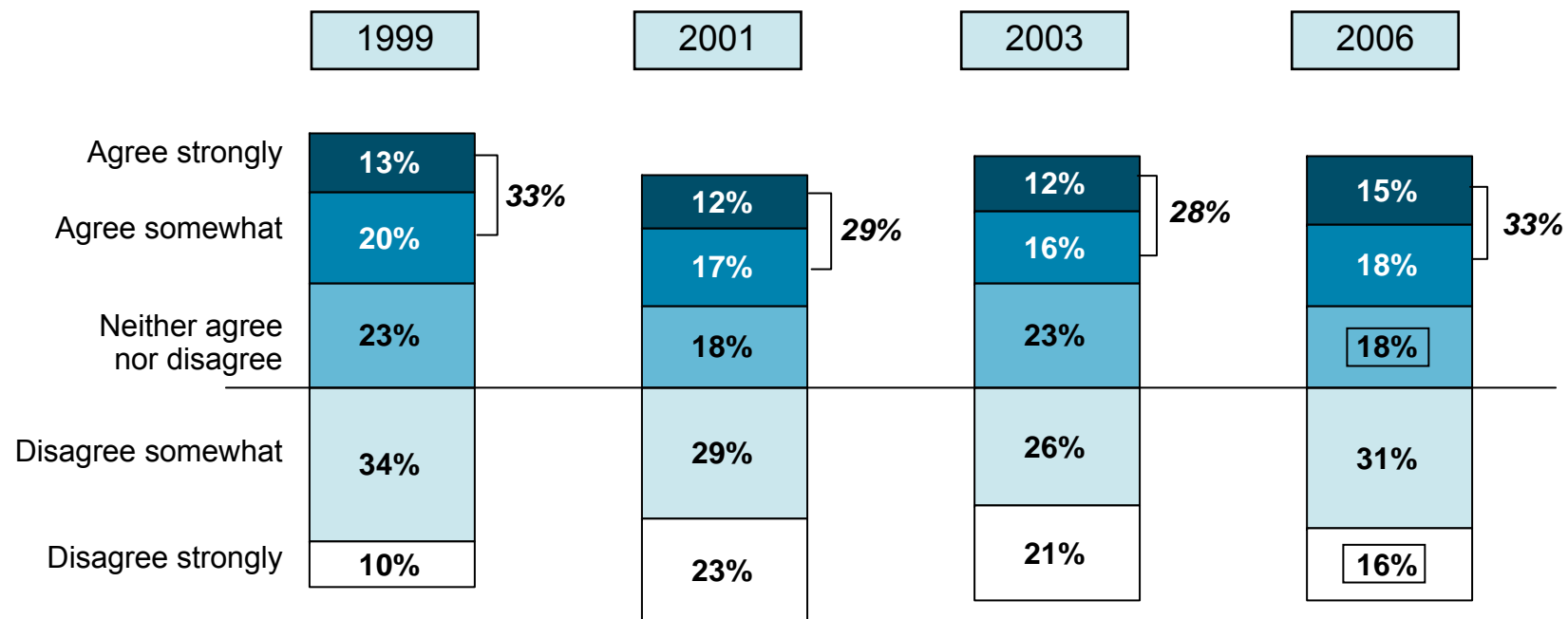
○ Significantly higher than GLM III at the 95% confidence level

Quality and Fibers - United Kingdom

Quality and Fibers - United Kingdom

There is a slight increase in the percentage of UK respondents who agree it is important that their clothes are made from natural fibers such as wool and cotton.

It Is Important That My Clothes Are Made From Natural Fiber Such As Wool And Cotton

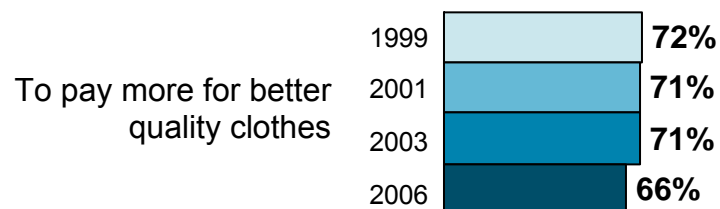


□ Significantly lower than GLM III at the 95% confidence level

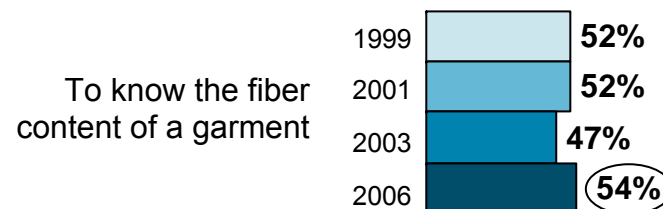
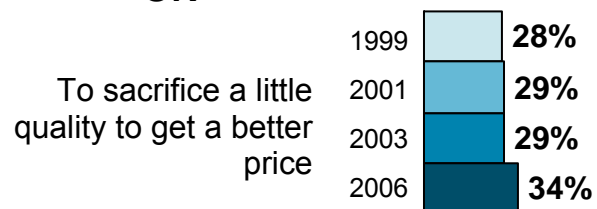
Quality and Fibers - United Kingdom

Consumers in the UK would prefer to pay more for better quality clothes than to sacrifice quality to get a better price. There is an increase in those who prefer to know the fiber content relative to knowing the brand name.

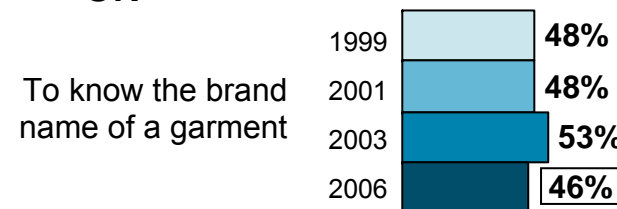
Preferences



OR



OR

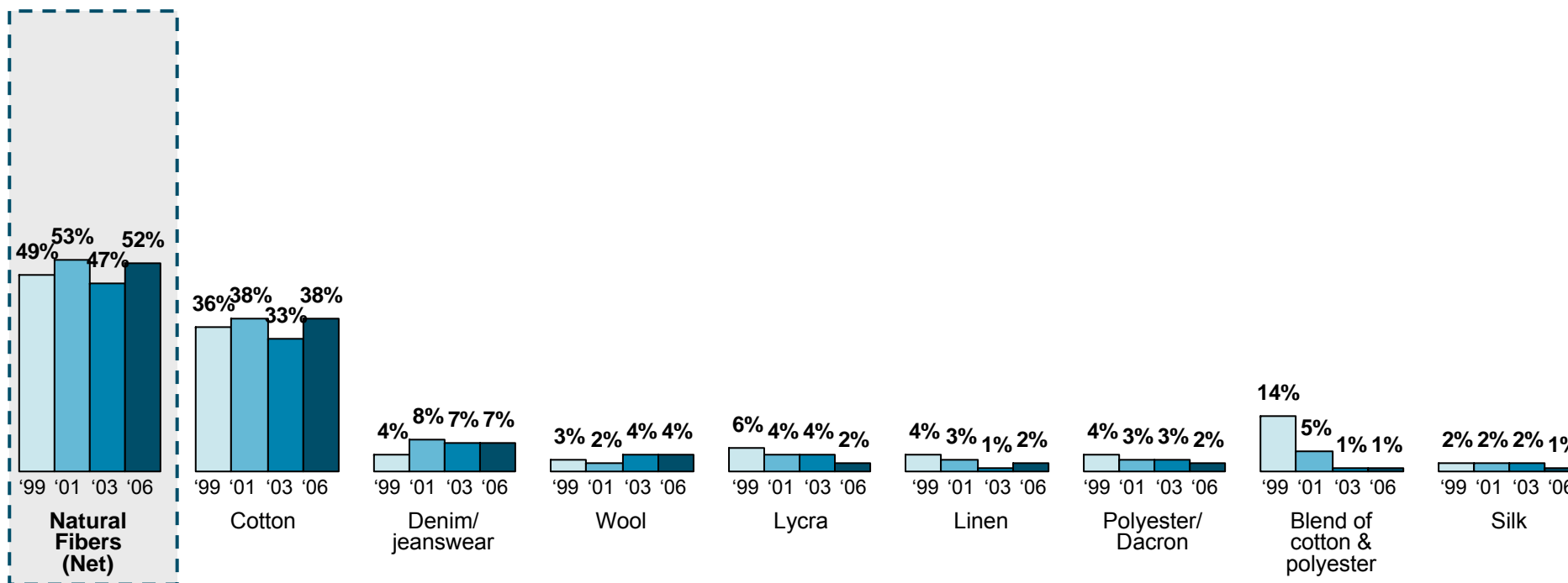


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Quality and Fibers - United Kingdom

Natural fibers as a whole continue to be perceived as best suited for today's fashions. Cotton continues to be cited as the best natural fiber over denim and wool.

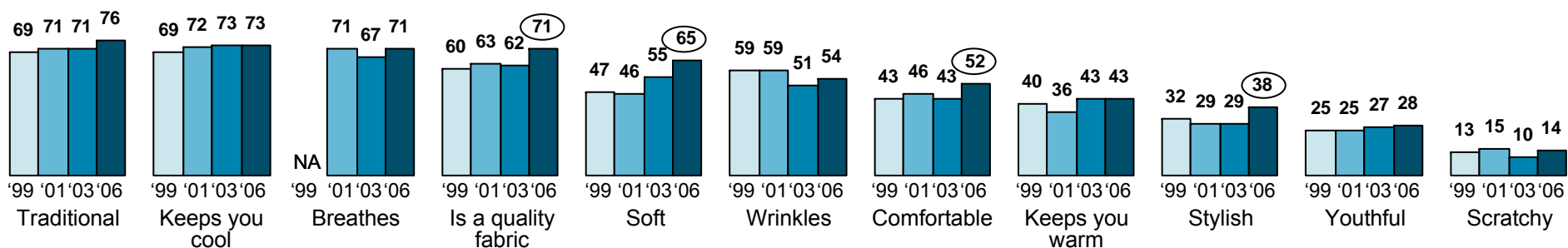
Fiber Best Suited For Today's Fashions



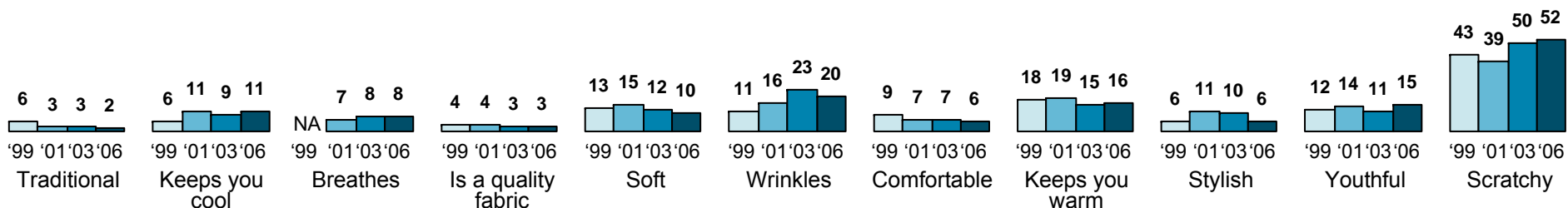
Quality and Fibers - United Kingdom

In comparison to polyester, cotton is ranked significantly higher in many important attributes. There is an increase among those who perceive cotton as a quality fabric and as a soft and comfortable fabric.

Attributes Describing Cotton (%)



Attributes Describing Polyester (%)



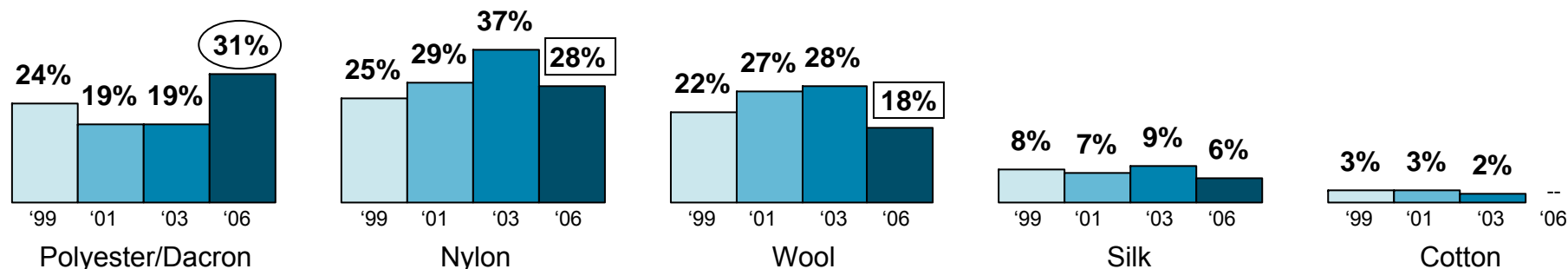
NA Not asked

○ Significantly higher than GLM III at the 95% confidence level

Quality and Fibers - United Kingdom

Despite the growing trend to take note of fiber content, fewer people claim to avoid particular fibers such as nylon and wool. However, there is an increase in the percentage who avoid polyester specifically.

Fiber Avoided When Purchasing Clothing (Among Those Who Said They Avoid Particular Fibers)



○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

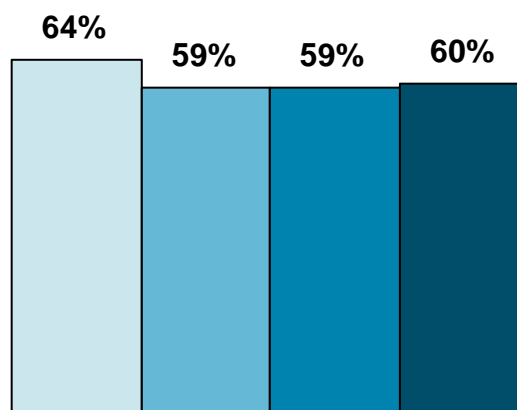
Denim & Stretch - United Kingdom

Denim & Stretch - United Kingdom

The proportion of people who do not know from which fiber denim/jeanswear is made has remained constant. There is a consistent response in those who correctly stated that cotton is the fiber component of denim; one-in-five cited denim as the fiber.

Aware That Denim and Jeanswear Is Made From Cotton

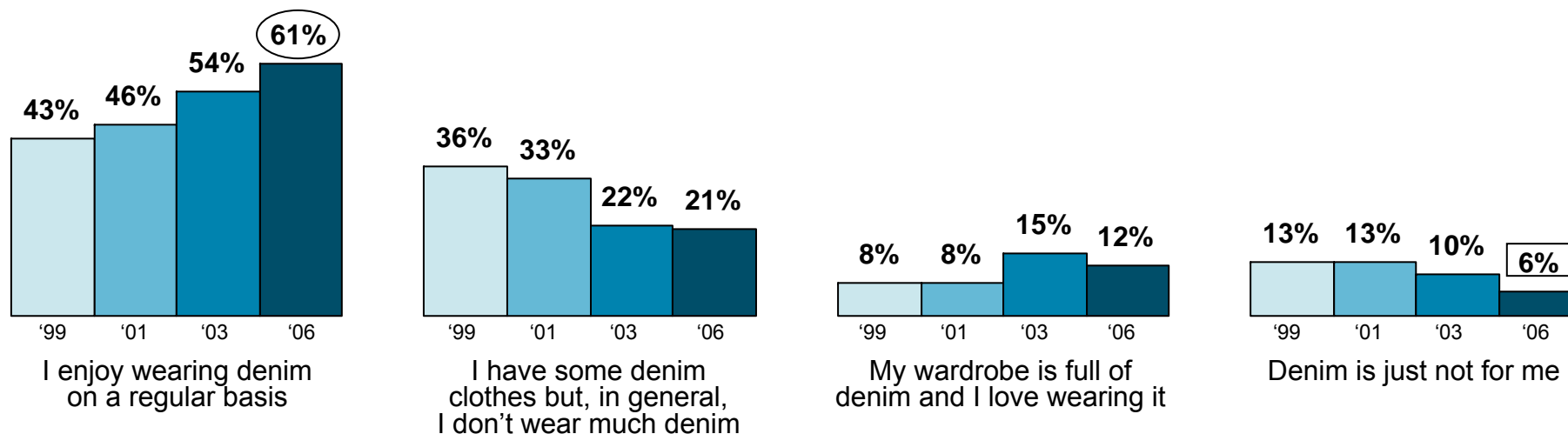
1999 2001 2003 2006



Denim & Stretch - United Kingdom

Significantly more UK consumers enjoy wearing denim on a regular basis while there is a decline among those who state denim is just not for me.

Attitudes Towards Denim/Jeans wear

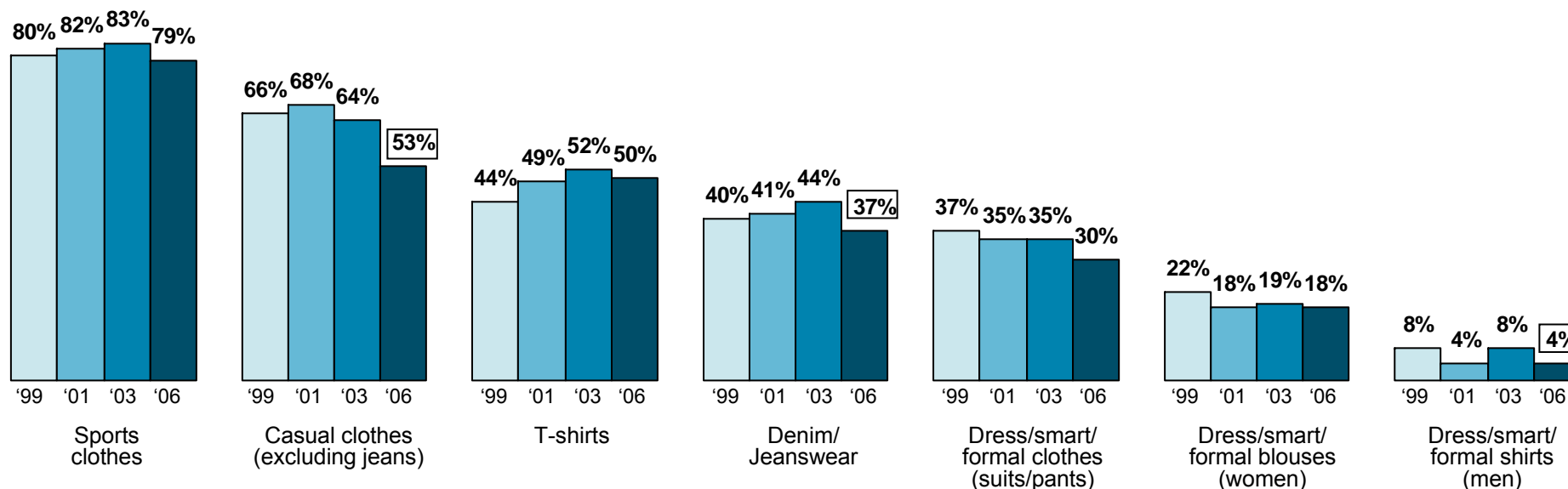


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Denim & Stretch - United Kingdom

Significantly fewer UK consumers think it is important that casual clothes, denim, and men's dress shirts have stretch or elastic fabric. Sports clothing remains the most important fabric to have this quality.

Think It's Important To Have *Stretch* or *Elastic Fabric* In Certain Types of Clothing



□ Significantly lower than GLM III at the 95% confidence level

Recommendations - United Kingdom



Recommendations - United Kingdom

Currently, the UK has one of the highest average spending allowances where a majority is spent on casual clothes. There is a positive trend for cotton in the UK where it is more important to know the fiber content of clothing prior to purchasing. Some opportunities lie in the UK with the following:

- Inspiration comes from a multitude of sources in the UK. Cotton campaigns can benefit from advertising product quality specifically in specialty stores where usage has increased significantly.
- Reinforcing the benefits of 100% cotton can be beneficial since an increased percentage of UK consumers agree with the positive qualities of cotton.
- Similar to Germans, those in the UK certainly know about their jeans. They have the highest percentages of shoppers who know that denim comes from cotton, and they wear jeans more often than those in other countries. This is an opportunity for cotton to be equated with non-traditional fashion.