

# Consumers and retailers have mismatched perceptions around apparel purchase decisions

## Finds Retail Localization & Agility Survey

### Retailers Shift to Local/Domestic Manufacturing and Sourcing

In response to COVID-19, regarding their local/domestic manufacturing and sourcing strategy:

65% of retailers established or expanded their strategy



17% of retailers made no changes to their strategy



Retailers' top decision driver to execute nearshoring strategy and move sourcing and manufacturing closer to their primary consumer markets include:

1. Demand for domestically made products
2. A more environmentally sustainable business model
3. Increased flexibility

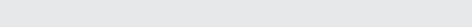
### Retailers' Perceptions Not Matching up to Consumer COVID-19 Behavior

Retailers felt their consumers:

68% valued products made in the U.S.



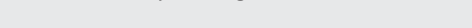
19% of consumers sought out merchandise made in the U.S. during COVID-19



63% valued quick deliveries



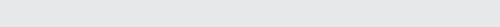
23% of consumers sought out quickest online delivery during COVID-19



64% valued promotional pricing and sales



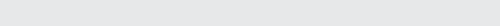
32% of consumers sought out the lowest price during COVID-19



50% valued environmental sustainability



17% of consumers sought out products that are environmentally friendly or sustainable during COVID-19



Important considerations for consumers when choosing where to purchase clothing or footwear:

66% said a retailer's or brand's environmental sustainability

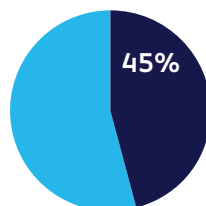


60% said a retailer's or brand's social impact

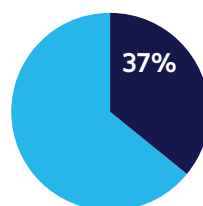


### Consumers Still Prefer Shopping in Physical Stores

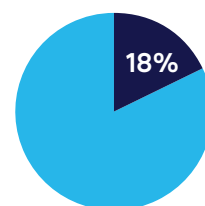
Despite growing COVID-19 cases, consumers prefer to purchase clothing/footwear:



In-store



in-store and online



online