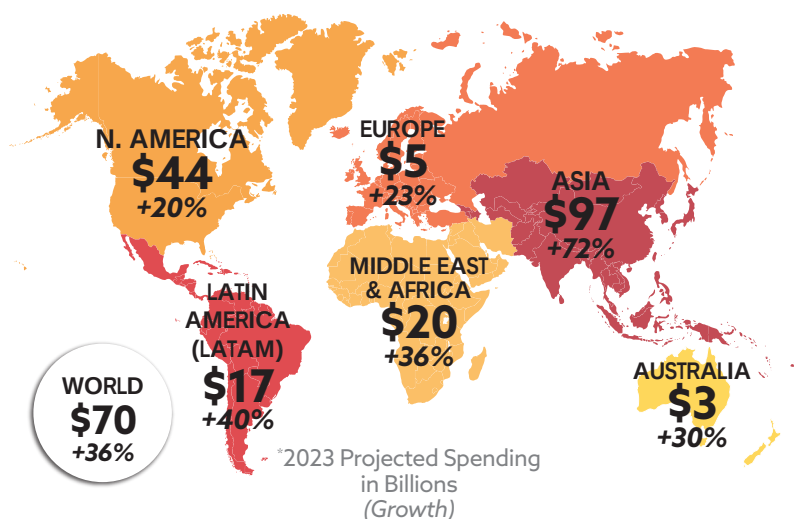


The global market for childrenswear is projected to reach \$239 billion by 2023. The five-year growth of 40% in childrenswear outpaces growth in overall apparel, projected at 27% from 2018-2023. Markets in Asia will see the largest growth, as parents purchase fashionable clothing for their children. In addition to these in-store experiences, online tools allow children and their parents to browse and buy clothing together.

INDUSTRY OUTLOOK 2018-2023*



KEY INSIGHTS

86%

PURCHASE
CHILDRENSWEAR
ONLINE

E-commerce is an essential channel for parents and their children to browse and buy clothing.

50%

ALLOW THEIR CHILDREN
TO INFLUENCE
CLOTHING PURCHASES

Parents and children negotiate clothing purchases, as they balance differing views on style and function.

75%

ASSOCIATE
COTTON CLOTHING
WITH COMFORT

In the end parents want their children to be comfortable in their clothing, and rate cotton highest in comfort.

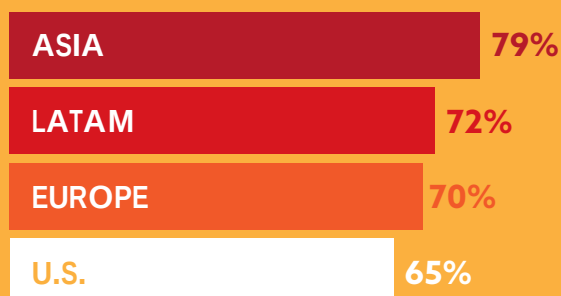
RETAIL CHANNELS FOR CHILDREN'S CLOTHING

96%



GLOBAL CONSUMERS
WHO PURCHASE CLOTHING
IN PHYSICAL STORES

Shop online channels of traditionally
brick-and-mortar stores
(department stores, mass merchants, etc.)



Use online sources to gather
childrenswear inspiration



83%

ASIA



74%

LATAM



52%

EUROPE



52%

U.S.

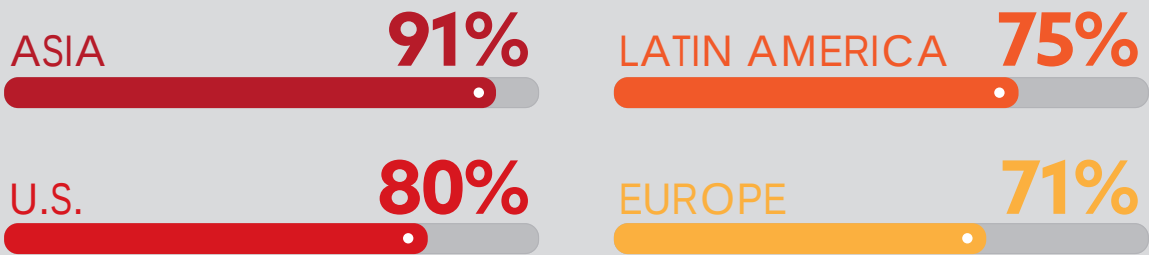


SHOPPING JOURNEY

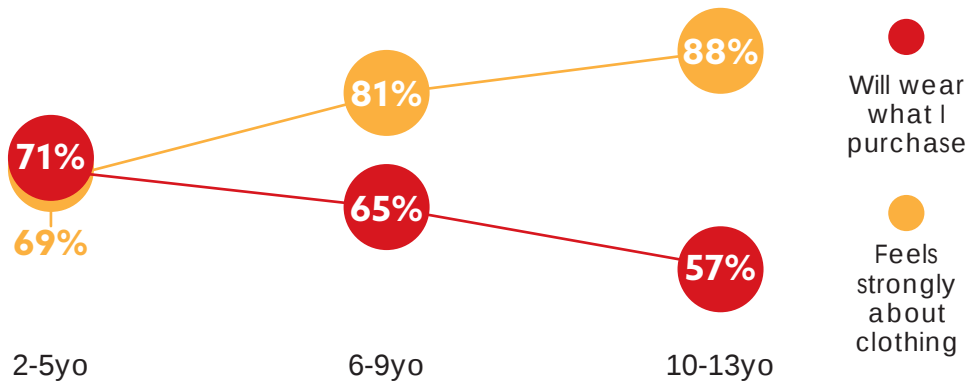
The childrenswear shopping journey is marked by negotiation between parent and child, especially as children age and develop a growing sense of personal style. Beyond these struggles, parents look for clothes that will be comfortable for their children and will last – and they rate cotton highest in these attributes. Brands and retailers can help parents by providing comfortable childrenswear for their opinionated kids.

PARENTS' IMAGE AT STAKE

Percentage of parents who say child's dress is a reflection on themselves

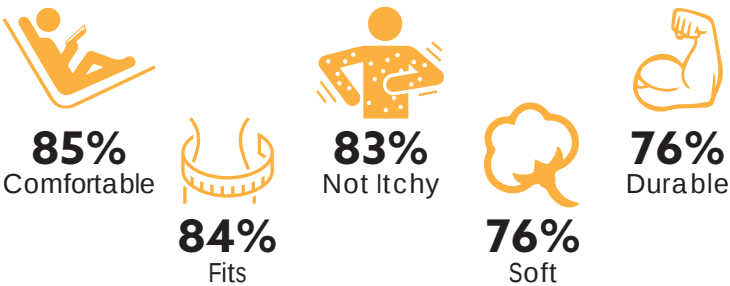


STRUGGLES GROW WITH AGE



TOP RATED ATTRIBUTES

Percentage who say factor is very important



COTTON PERFORMS

Percentage who associate cotton clothing with factor

