



European Market Research Textiles tested for harmful substances

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BBE RETAIL EXPERTS

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1 DEFINITION OF THE PROJECT, METHODOLOGY

- The Textil-Service-Verlags- und Zertifizierungsstelle Öko-Tex GmbH, Eschborn wants to know the awareness and relevance of textile-seals in general and the Oeko-Tex® Standard 100 in particular in several European countries. In July 2008 BBE RETAIL EXPERTS were assigned to analyze seven selected European countries (Italy, France, Spain, Portugal, Switzerland, Austria, Netherlands) regarding to this topics.
- Within a consumer survey in the selected countries we verified the interest of the consumers in textiles that are tested for harmful substances and the awareness of textile-seals, especially the label of Oeko-Tex® Standard 100. The questionnaire included five topical and three statistical questions. The sample size was 400 to 500 pedestrians in two respectively three towns – one large town (preferably no touristic area) and one or two small towns – in each country.
- Within a telephonic retailer survey in the selected countries we verified the relevance of textiles that are tested for harmful substances in the context of the order process. We asked for the awareness, usage and prospect of textile- and eco-seals. The questionnaire included eight topical and three statistical questions. The random sample size was 200 retailers per country. Within a pretest 50 retailers of each country were asked for the common country-specific textile-seals.
- The surveys and the analysis of the results were executed in August and September 2008.

2 RETAIL SURVEY RESULTS

RETAIL SURVEY RESULTS

PRELIMINARY NOTE

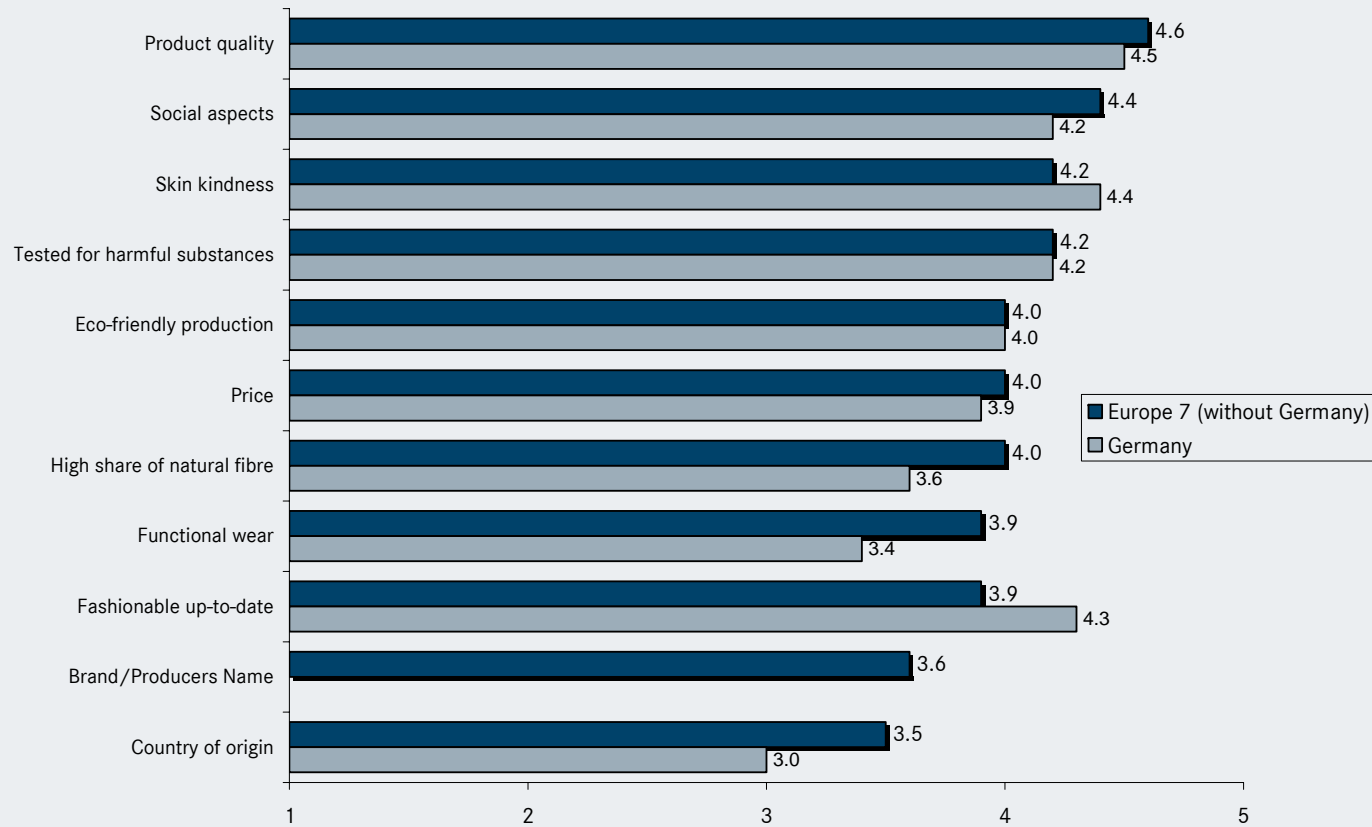
- The following charts show the fundamental results of the eight questions of the retail surveys in words and graphics.
- Within the graphics the aggregated results over seven nations on the one hand and the nation-specific results (ranking of nations) on the other hand are shown.
- Further differentiations are concerning the differing trade segments: women's outerwear – men's outerwear – children's/baby wear – sportswear – home textiles – underwear/beachwear.
- In some tables notably distinctive results are tagged with colored circles: ○
- To get more differentiations the basis data are available.

IMPORTANT ASPECTS WITH THE PURCHASE OF CLOTHING + TEXTILES

- “Product quality”, “Social aspects”, “Skin kindness” and “Tested for harmful substances” are the most important aspects with the purchase of clothing and textiles.
- Scaled from 1=unimportant to 5=very important these aspects count between 4.2 and 4.6. The importance of “Skin kindness” and “Tested for harmful substances” reflects the increased consumer sensitivity. In recent time aspects of the production process, like child labor, cheap wages, conditions of work, become more important. The country of origin is less important (3.5) than the conditions of production.
- The eco-friendly production and a high share of natural fibre are scaled equally to the price-aspect (4.0).
- Besides the eleven predetermined aspects each seventh interviewee named additional aspects (e.g.): attractive design, correct fit, high material quality, friendly service, competent personal, selling capacity, price, payment conditions, exclusivity of the collection.

2 RETAIL SURVEY RESULTS

Retail trade: IMPORTANT CRITERIA PURCHASING CLOTHING AND TEXTILES



Source: BBE european trend analysis 2008; Question 1: "How important are the following aspects with the purchase of clothing and textiles for you?"; scaled from 1=unimportant to 5=very important; Germany = BBE retail trade survey 2008

2 RETAIL SURVEY RESULTS

Retail trade: IMPORTANT ASPECTS WITH THE PURCHASE OF CLOTHING + TEXTILES

Important aspects	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
Product quality	4.9	4.4	4.4	4.6	4.6	4.6	4.5	4.6	4.5
Social aspects	4.7	4.2	4.2	4.6	4.6	4.2	4.3	4.4	4.2
Skin kindness	4.6	3.5	4.0	4.4	4.4	4.4	3.8	4.2	4.4
Tested for harmful substances	4.7	3.9	4.1	4.3	4.2	4.0	3.9	4.2	4.2
Eco-friendly production	4.4	3.5	4.1	4.3	4.1	3.9	4.0	4.0	4.0
Price	4.2	4.0	4.3	4.3	3.7	3.7	3.9	4.0	3.9
High share of natural fibre	4.5	3.8	4.0	4.1	3.8	3.9	3.7	4.0	3.6
Functional wear	4.5	3.8	3.7	4.2	3.6	3.9	3.9	3.9	3.4
Fashionable up-to-date	4.3	3.7	3.7	4.0	4.1	3.9	3.9	3.9	4.3
Brand/Producers Name	3.9	3.6	3.7	3.7	3.6	3.3	3.5	3.6	—
Country of origin	4.4	3.4	3.5	3.8	3.7	3.2	2.6	3.5	3.0

Source: BBE RETAIL EXPERTS; Question 1: "How important are the following aspects with the purchase of clothing and textiles for you?"; scaled from 1=unimportant to 5=very important;
Source for German data: cpd trade fair / retail trade survey 2008

Retail trade: AIDED AWARENESS AND USAGE OF TEXTILE-SEALS

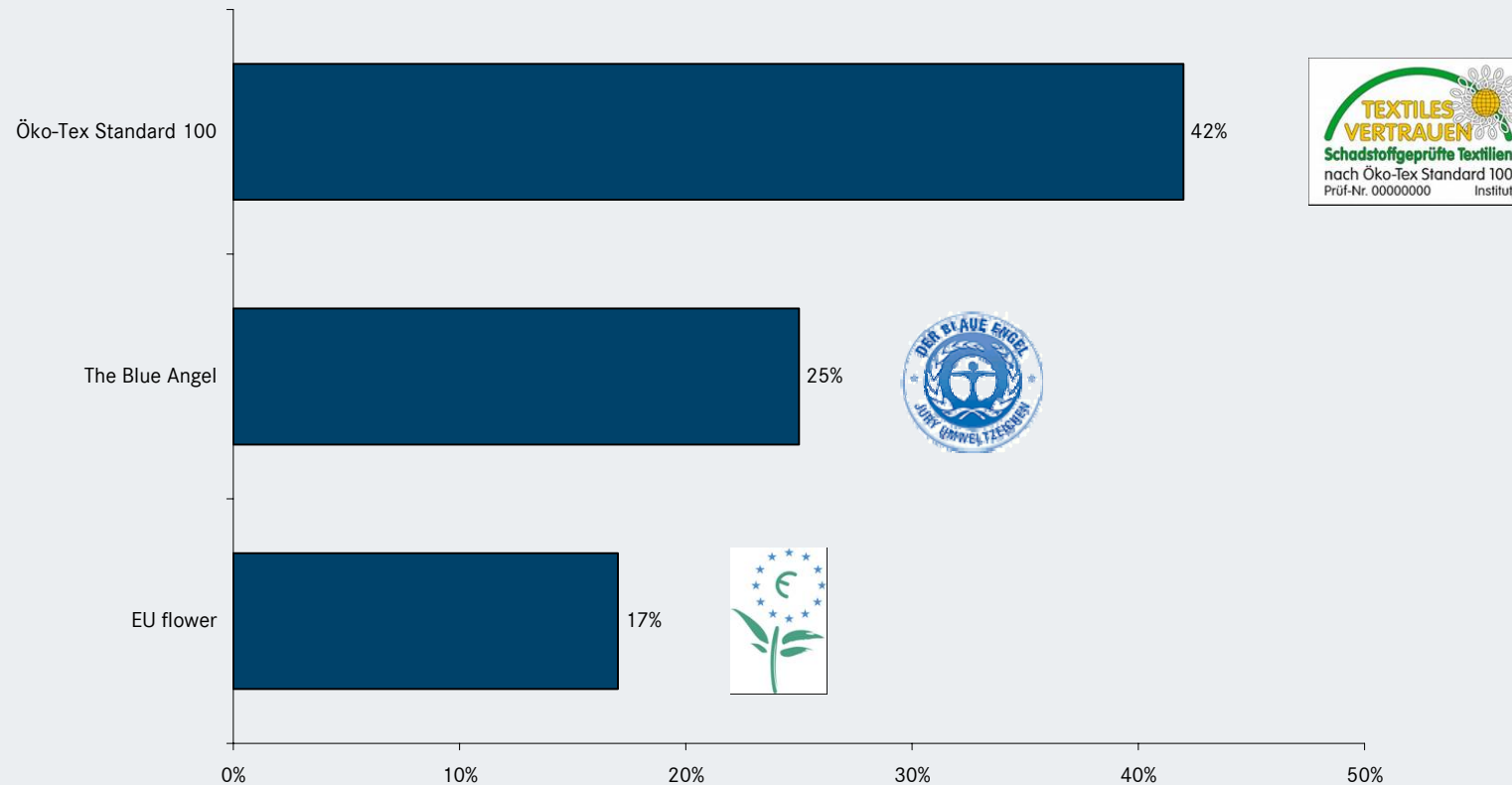
- The aided question to the awareness of textile-seals/labels included four predetermined seals/labels, in Italy and the Netherlands five, in Switzerland seven predetermined seals/labels.
- On the average of all regarded nations the Oeko-Tex® Standard 100 shows the highest awareness: 37% of the interviewees know this label.
- In Switzerland the Oeko-Tex® Label shows the strongest performance, followed by Austria. In Switzerland competitive seals as “Naturaline bio cotton” and the “Eco-Label” are also well-known. In France (18%), Italy and Spain (each with 24%) the awareness is below average.
- The other predetermined labels follow by far: Global Organic Textile Standard (21%), The Blue Angel (18%) and the EU Flower (18%).

Retail trade: AIDED AWARENESS AND USAGE OF TEXTILE-SEALS

- The interviewees, who know the Oeko-Tex® Label, use it in their assortment by high percentage: 59% on an average of all nations – above the average in Italy (71%) and the Netherlands (73%), below the average in Spain (32%) and France (44%).
- Usage of Global Organic Textile Standard, The Blue Angel and EU Flower ranges between 40% and 48% below the Oeko-Tex® Label.
- Naturaline bio cotton (44% in Switzerland), Eco-Label of Migros (29% in Switzerland) and Hess Natur (11% in Switzerland) show comparatively low usage.

2 RETAIL SURVEY RESULTS

Retail trade: AIDED AWARENESS OF TEXTILE-SEALS (8 countries Total)



Source: BBE european trend analysis 2008; Question 3: "Which of the following textile-seals do you know and which do you already offer in the context of your assortment?"
German data = BBE retail trade survey 2008

2 RETAIL SURVEY RESULTS

Retail trade: AIDED AWARENESS OF TEXTILE-SEALS

Degree of awareness	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Germany*	Europe 7 (without Germany)	Europe 8 (with Germany)
Öko-Tex Standard 100	24%	18%	24%	38%	54%	55%	44%	79%	37%	42%
The Blue Angel	34%	7%	14%	12%	20%	24%	20%	65%	18%	25%
EU flower	28%	8%	19%	16%	16%	20%	17%	11%	18%	17%
Global Organic Textile Standard	18%	14%	17%	25%	20%	30%	23%	—	21%	21%
Naturaline bio cotton	—	—	—	—	53%	—	—	—	**	**
Eco-Label	46%	—	—	—	49%	—	—	—	**	**
Hess Natur	—	—	—	—	18%	—	—	—	**	**
Eko sustainable Textile	—	—	—	—	—	—	4%	—	**	**
Toxproof	—	—	—	—	—	—	—	—	**	**
Schadstoffgeprüft LGA	—	—	—	—	—	—	—	—	**	**

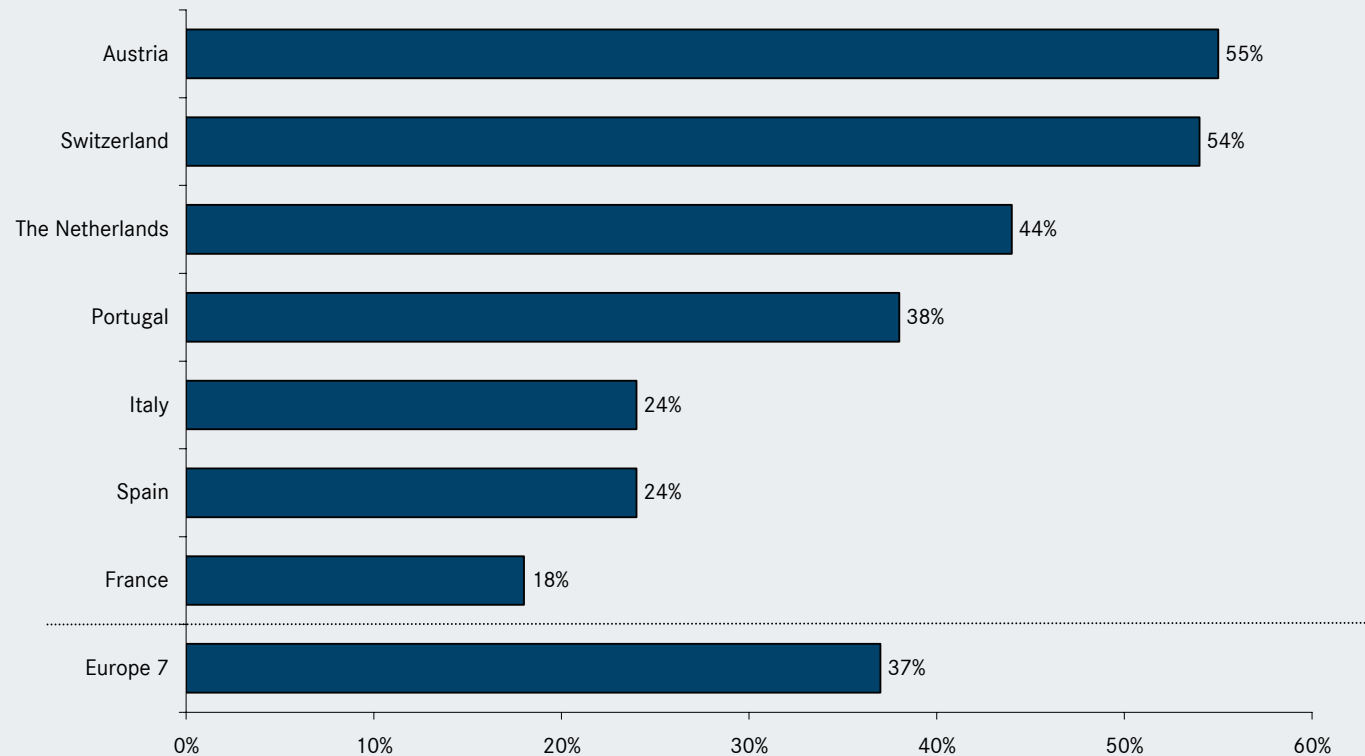
Source: BBE european trend analysis; Question 3: "Which of the following textile-seals do you know and which do you already offer in the context of your assortment?";

*Germany = BBE retail trade survey 2008

**textile-seal exists not in every country

2 RETAIL SURVEY RESULTS

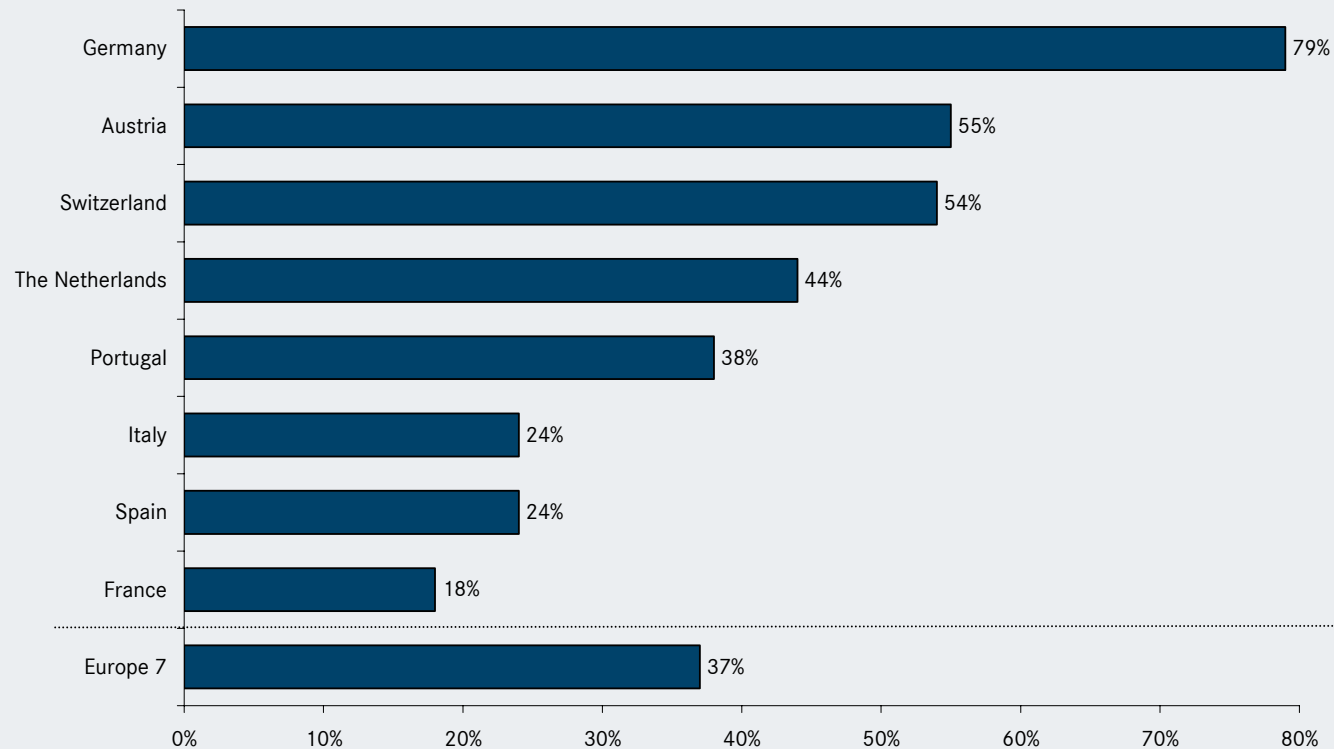
Retail trade: AIDED AWARENESS OF “OEKO-TEX® STANDARD 100” (ranking of nations)



Source: BBE RETAIL EXPERTS; Question 3: “Which of the following textile-seals do you know and which do you already offer in the context of your assortment?”

2 RETAIL SURVEY RESULTS

Retail trade: AIDED AWARENESS OF “OEKO-TEX® STANDARD 100” (ranking of nations including Germany*)



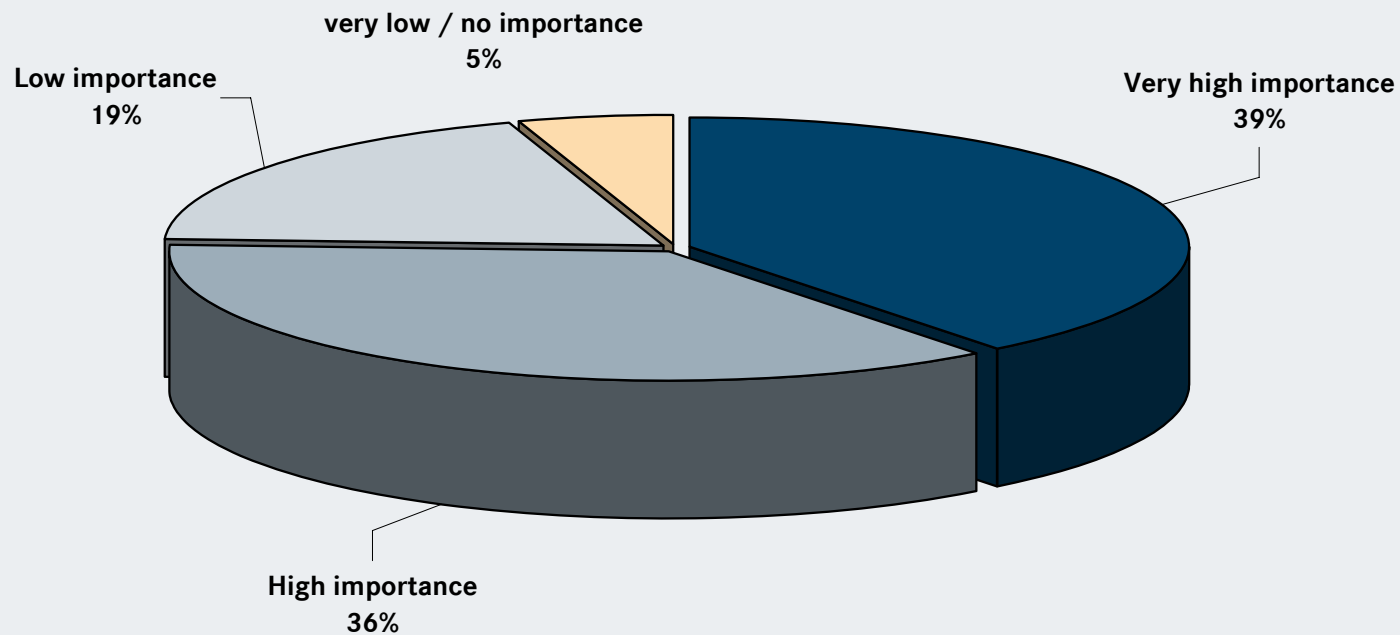
Source: BBE RETAIL EXPERTS; Question 3: “Which of the following textile-seals do you know and which do you already offer in the context of your assortment?”; *=Trade fair survey, spring 2008

Retail trade: IMPORTANCE OF “TESTED FOR HARMFUL SUBSTANCES” FOR THE SALE PROCESS

- For only 24% the sales argument “Tested for harmful substances” has (still) less importance – this shows: there is unused sales potential.
- 75% use the attribute “Tested for harmful substances” as a sales argument respectively attach high or very high importance to the attribute – in Italy the quota is 95%.
- Switzerland and Austria range below the average by 64-67%. It is not clear whether the pollution-tested-aspect is regarded as a matter of course or other aspects e.g. the social aspect move into the foreground.
- Possibly it is assumed that the label is self-explanatory and the consumer does not need any further explanations.

2 RETAIL SURVEY RESULTS

Retail trade: IMPORTANCE OF “TESTED FOR HARMFUL SUBSTANCES” FOR THE SALE PROCESS (seven nations together)



Source: BBE RETAIL EXPERTS; Question 4: “Which importance does “tested for harmful substances” have for the sale process?”

2 RETAIL SURVEY RESULTS

Retail trade: IMPORTANCE OF “TESTED FOR HARMFUL SUBSTANCES” FOR THE SALE PROCESS

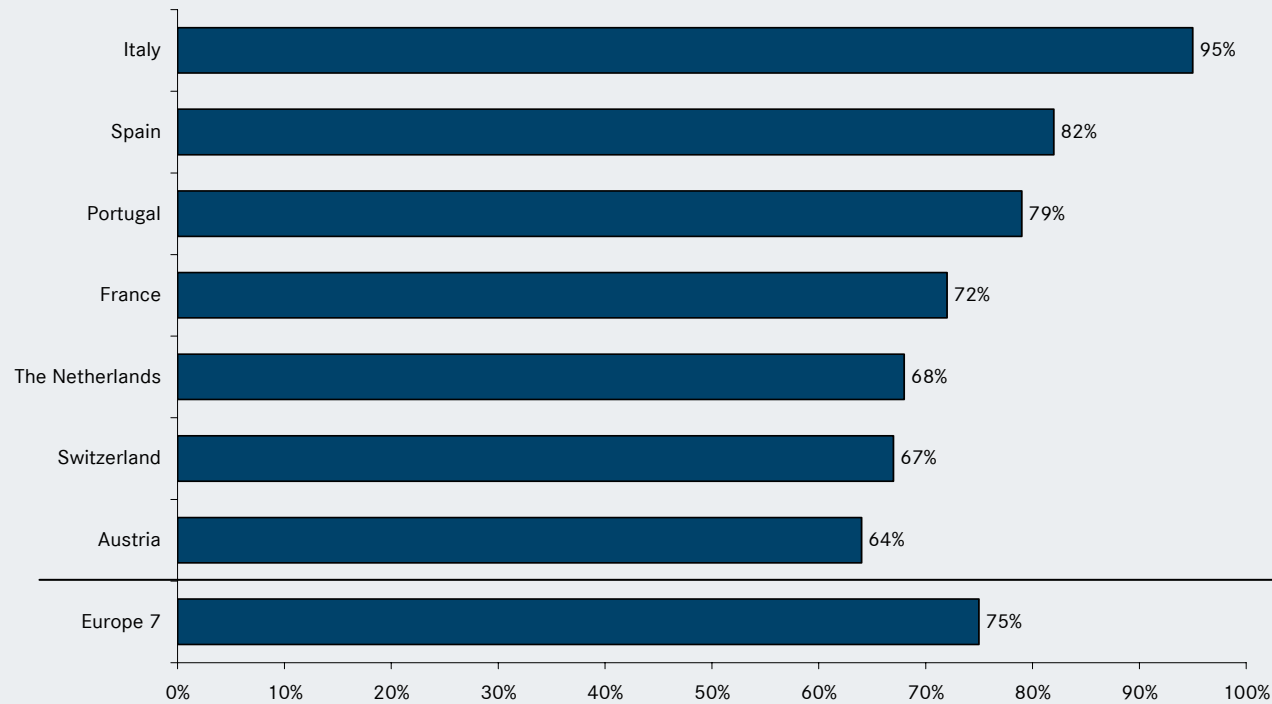
Importance of "Tested for harmful substances" for the sale process	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7
Very high importance	82%	39%	45%	41%	35%	25%	8%	39%
High importance	13%	33%	37%	38%	32%	39%	61%	36%
Low importance	4%	21%	13%	6%	30%	32%	29%	19%
very low / no importance	2%	6%	2%	14%	4%	4%	4%	5%

Source: BBE RETAIL EXPERTS; Question 4: “Which importance does “tested for harmful substances” have for the sale process?”

2 RETAIL SURVEY RESULTS

Retail trade: IMPORTANCE OF “TESTED FOR HARMFUL SUBSTANCES” FOR THE SALE PROCESS

(ranking of nations; “very high importance” and “high importance” accumulated)



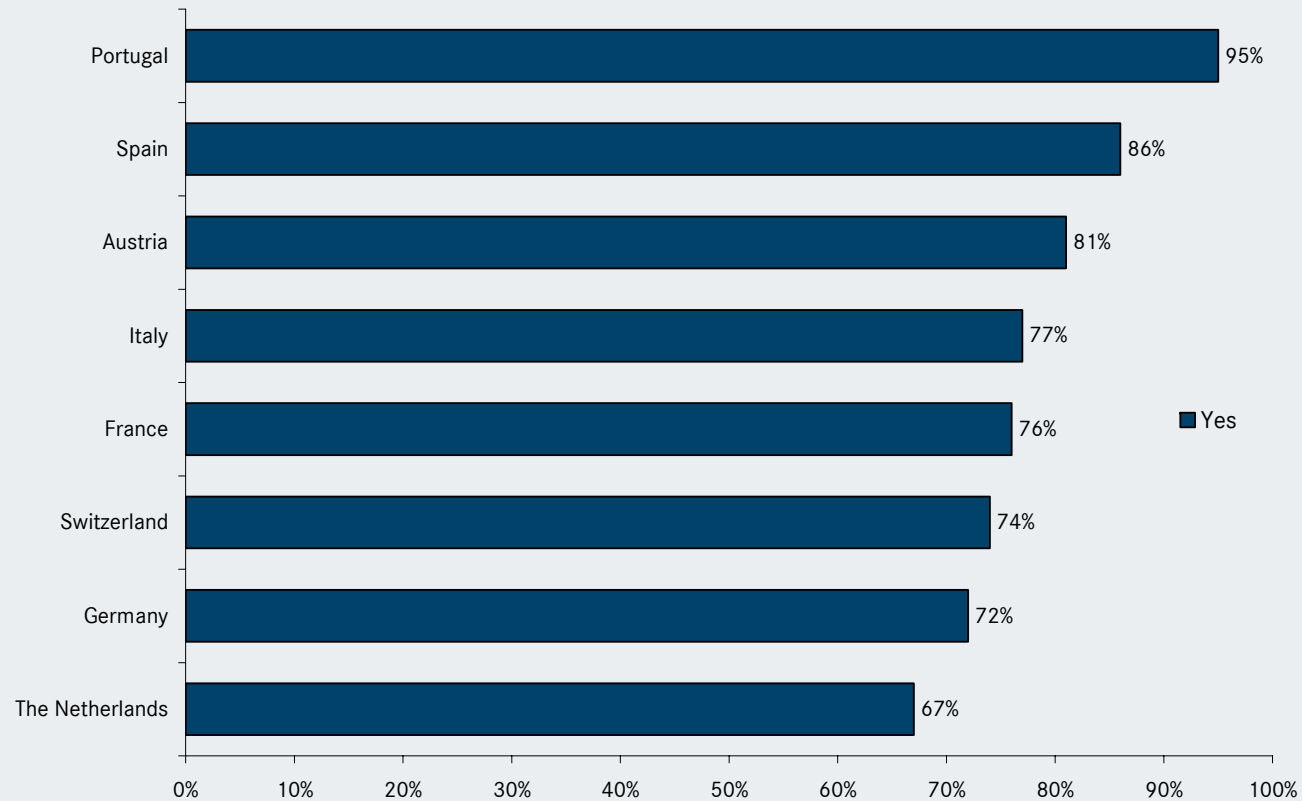
Source: BBE RETAIL EXPERTS; Question 4: “Which importance does “tested for harmful substances” have for the sale process?”

Retail trade: LABELING MORE CERTIFIED PRODUCTS?

- The question “Are in your opinion more labeled products and articles required, which are certified?” is mostly answered with a clear “yes”. On the average of all seven nations the accordance is by 79%. Portugal (95%) and Spain (86%) are above the average, the Netherlands (67%) are below the average.
- Especially the bigger companies are interested in labeling. (Keyword: self-explanatory, less personal)
- Referring to the different trade segments interviewees from home textile industry require more labeling, except in Switzerland and the Netherlands.
- Also sportswear shows potential for more labeling.

2 RETAIL SURVEY RESULTS

Retail trade: LABELING MORE CERTIFIED PRODUCTS?



Source: BBE european trend analysis 2008; Question 5: "Are in your opinion more labeled products and articles required, which are certified?";
Germany = BBE retail trade survey 2008

Retail trade: RELEVANCE OF “TESTED FOR HARMFUL SUBSTANCES” WITHIN THE ORDER PROCESS

- The relevance of “Tested for harmful substances” within the order process is regarded as high by the most interviewees. On the average of all seven nations 54% anticipate an increasing importance. 36% believe in stagnation or decrease.
- The Italians (70%) and the Portuguese (63%) show the most positive anticipation. The Dutchmen think of an increase only by 35% - each fifth believes in decrease.
- Referring to trade segments an increase is expected in the segment of women’s outerwear and children’s wear soonest.

2 RETAIL SURVEY RESULTS

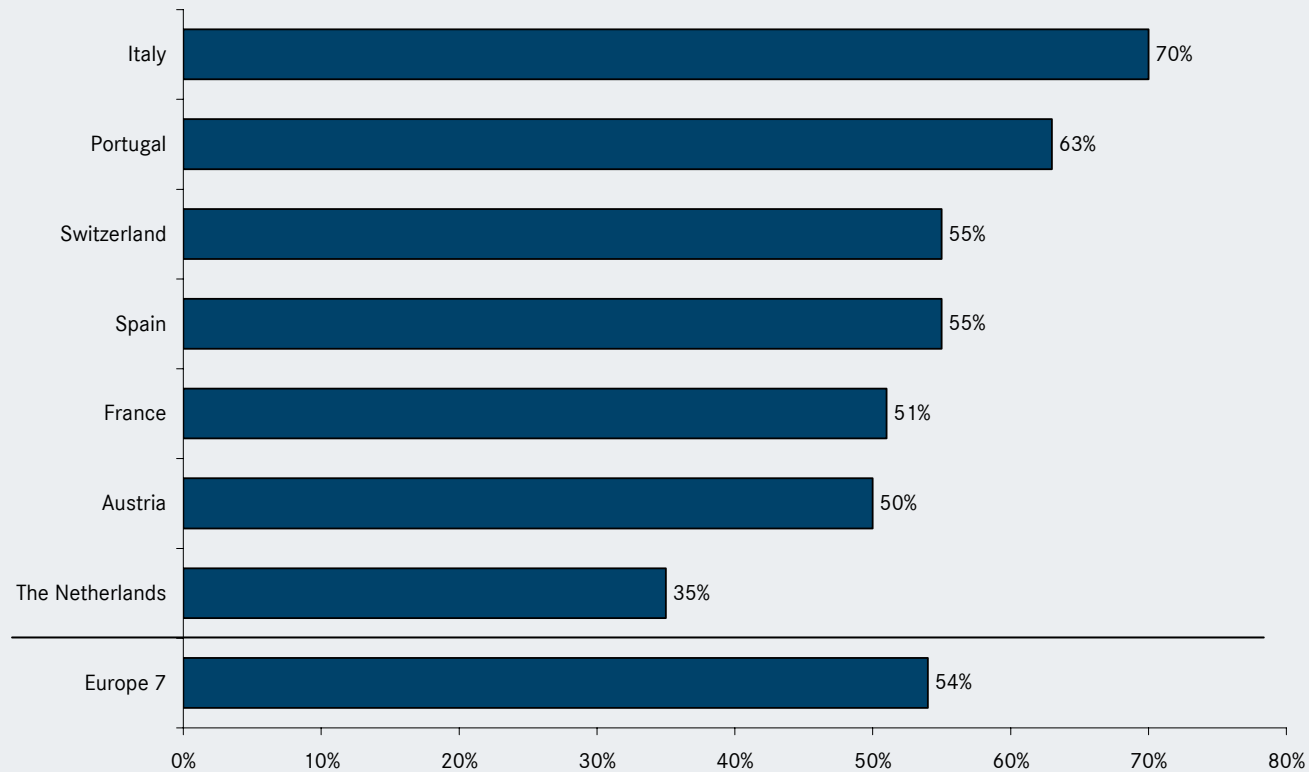
Retail trade: RELEVANCE OF “TESTED FOR HARMFUL SUBSTANCES” WITHIN THE ORDER PROCESS

Relevance of "Tested for harmful substances" within the order process	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7
will increase	70%	51%	55%	63%	55%	50%	35%	54%
stagnation	15%	21%	29%	15%	30%	27%	36%	25%
will decrease	6%	16%	7%	11%	7%	6%	21%	11%
no answer/no responsibility	9%	12%	9%	11%	8%	17%	8%	10%

Source: **BBE** RETAIL EXPERTS; Question 6: “How will the relevance of “tested for harmful substance”-textiles develop in the context of your order behavior?”

2 RETAIL SURVEY RESULTS

Retail trade: RELEVANCE OF “TESTED FOR HARMFUL SUBSTANCES” WITHIN THE ORDER PROCESS (ranking of nations; answers: “will increase”)



Source: **BBE** RETAIL EXPERTS; Question 6: “How will the relevance of “tested for harmful substance”-textiles develop in the context of your order behavior?”

2 RETAIL SURVEY RESULTS

Retail trade: RELEVANCE OF “TESTED FOR HARMFUL SUBSTANCES” WITHIN THE ORDER PROCESS (by trade segment)

Relevance of "Tested for harmful substances" will be increasing within the order process	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands
Womens wear	83%	50%	61%	75%	56%	47%	28%
Mens wear	58%	39%	53%	69%	64%	50%	42%
Childrens wear	67%	61%	39%	64%	61%	56%	39%
Sports wear	69%	58%	53%	47%	42%	42%	36%
Home textiles	75%	50%	64%	57%	46%	50%	29%
Underwear, beachwear	64%	46%	61%	64%	61%	54%	32%
Average for all trade segments	70%	51%	55%	63%	55%	50%	35%

Source: BBE RETAIL EXPERTS; Question 6: “How will the relevance of “tested for harmful substance”-textiles develop in the context of your order behavior?”

Retail trade: SOURCES OF INFORMATION FOR TEXTILE AND ECO-LABELS

- There are many options to get information. The knowledge about the sources of information allows a target-orientated marketing.
- The main source is conversation with producers. 48% of the interviewees prefer this source.
- By far follows the internet, mentioned by 10%. 9% use trade journals/magazines and 8% use product training measures to inform themselves. Mailings by producers or purchasing associations are mentioned by every twentieth. This underlines the relevance of the suppliers. But competition by the medium internet rises.
- Trade fairs have less relevance (7%). Therefore it is noticeable, that interviewees were not only buyers but also salespersons.

2 RETAIL SURVEY RESULTS

Retail trade: SOURCES OF INFORMATION FOR TEXTILE AND ECO-LABELS

Sources of information for textile and eco-labels	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
Conversations with producers	68%	36%	43%	49%	47%	36%	58%	48%	34%
Internet	7%	10%	14%	16%	7%	4%	12%	10%	53%
Trade journals/magazines	4%	16%	5%	2%	12%	13%	10%	9%	28%
Product training measures	7%	12%	1%	2%	13%	16%	4%	8%	6%
Trade fairs	9%	5%	17%	5%	7%	9%	2%	7%	11%
Flyer, booklets	2%	6%	8%	8%	6%	9%	6%	6%	10%
Purchasing associations	2%	4%	8%	10%	3%	5%	6%	5%	9%
Mailings by producers and purchasing associations	1%	7%	1%	1%	5%	9%	3%	4%	17%

Source: **BBE** RETAIL EXPERTS; Question 7: "From where do you get mainly detailed information about the product characteristics and the special characteristics of the different textile-seals and/or eco-labels?"; Source for German data: cpd trade fair / retail trade survey 2008

Retail trade: LEVEL OF INFORMATION CONCERNING THE OEKO-TEX® STANDARD 100

- Although awareness of Oeko-Tex Standard 100 is quite satisfying the degree of information could be enhanced. Only 31% of the interviewees feel well-informed about the seal.
- The lack of information is confirmed by this survey result: 36% of the interviewees wish for more information, especially in Portugal (47%), Switzerland (47%) and Austria (57%).
- By 29% are not interested in information (on the average of seven nations), 51% in Italy and 47% in Spain.

2 RETAIL SURVEY RESULTS

Retail trade: LEVEL OF INFORMATION CONCERNING THE OEKO-TEX® STANDARD 100

Level of information concerning the Öko-Tex certificate	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
I have enough information	23%	36%	26%	32%	38%	25%	38%	31%	37%
I wish more information	26%	34%	23%	47%	47%	57%	22%	36%	35%
no interest for further information	51%	19%	47%	17%	15%	15%	40%	29%	28%
no answer	0%	11%	4%	5%	0%	3%	0%	3%	0%

Source: **BBE** RETAIL EXPERTS; Question 8: "Do you feel well-informed about the Oeko Tex Standard 100 and the label „Confidence in Textiles“?";
Source for German data: cpd trade fair / retail trade survey 2008

2 RETAIL SURVEY RESULTS

Retail trade: HIGH REQUEST FOR FURTHER INFORMATION CONCERNING THE OEKO-TEX® STANDARD 100 (by trade segments; answers „I wish more information“)

High request for further information concerning the Öko-Tex certificate	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands
Womens wear	31%	39%	17%	53%	56%	67%	19%
Mens wear	28%	31%	33%	39%	36%	58%	19%
Childrens wear	25%	42%	31%	58%	53%	47%	31%
Sports wear	25%	36%	17%	47%	50%	61%	22%
Home textiles	25%	29%	29%	32%	43%	64%	21%
Underwear, beachwear	21%	25%	11%	46%	39%	43%	18%
Average for all trade segments	26%	34%	23%	47%	47%	57%	22%

Source: BBE RETAIL EXPERTS; Question 8: “Do you feel well-informed about the Oeko Tex Standard 100 and the label „Confidence in Textiles“?”

3 CONSUMER SURVEY RESULTS

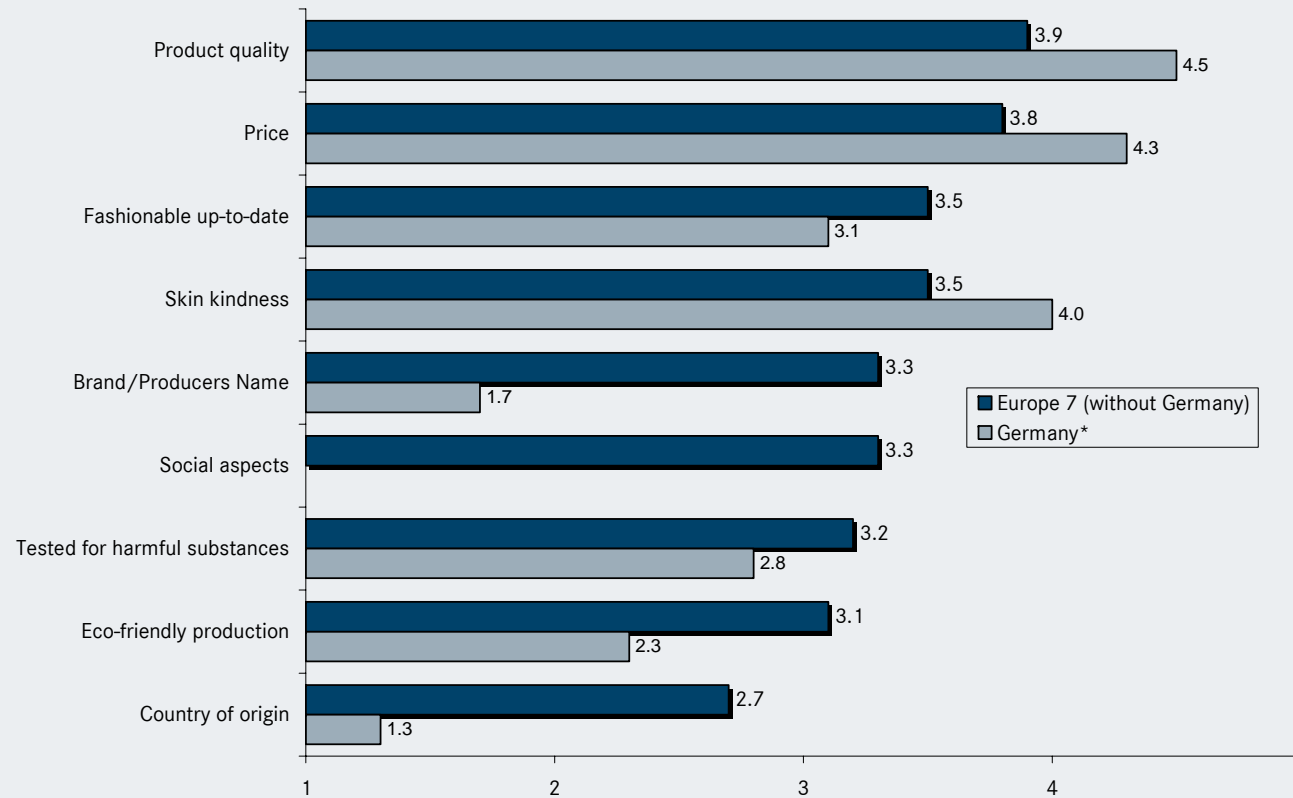
CONSUMER SURVEY RESULTS

Consumer: IMPORTANT CRITERIA FOR THE CHOICE OF CLOTHING AND TEXTILES

- All interviewed consumers should tell how important the (selected) criteria are for the choice of clothing and textiles. These criteria were asked for all trade segments: outerwear – children’s/baby wear – home textiles – underwear/beachwear.
- “Product quality” and “Price” are the most important aspects with the purchase of clothing and textiles. Scaled from 1=unimportant to 5=very important these aspects count between 3.7 and 4.0.
- The importance of “Skin kindness” ranks on third position (scaled between 3.4 and 3.7).
- “Social aspects” reach 3.4 over all trade segments. The critical view on the production process, like child labor, cheap wages, conditions of work, becomes more important.
- The criteria “Tested for harmful substances” is scaled highest in the segment of children’s/baby wear. In general this criteria ranges between 3.2 and 3.3 and therefore ranks in the middle. It is noticeable that labeling signs a qualitative upvaluation, which is included in the criteria “Product quality”.

3 CONSUMER SURVEY RESULTS

Consumer: IMPORTANT CRITERIA FOR THE CHOICE OF CLOTHING AND TEXTILES



Source: BBE european trend analysis 2008; Question 1: "How important are the following criteria for the choice of clothing and textiles?" scaled from 1=unimportant to 5=very important
* Germany = GfK consumer study Textile Seals 2006

3 CONSUMER SURVEY RESULTS

Consumer: IMPORTANT CRITERIA FOR THE CHOICE OF CLOTHING AND TEXTILES (Outerwear)

Outerwear	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
Product quality	3.9	3.8	3.6	4.2	4.1	3.9	4.2	3.9	1.
Price	4.4	3.8	3.3	4.7	3.7	3.7	3.9	3.9	2.
Fashionable up-to-date	4.0	3.6	3.4	3.9	3.3	3.6	3.6	3.6	4.
Skin kindness	3.9	3.1	3.1	3.9	3.5	3.1	3.7	3.5	3.
Brand/Producers Name	3.9	3.5	3.4	3.8	2.7	3.4	3.3	3.4	9.
Social aspects	4.2	2.8	3.1	2.8	4.1	3.0	3.5	3.4	—
Tested for harmful substances	4.4	2.9	3.0	3.0	3.1	3.1	3.3	3.3	5.
Eco-friendly production	3.5	2.8	2.9	2.9	3.6	3.1	3.2	3.1	7.
Country of origin	3.4	2.6	3.0	2.1	2.6	2.9	2.6	2.8	10.

Source: **BBE** RETAIL EXPERTS; Question 1: “How important are the following criteria for the choice of clothing and textiles?” scaled from 1=unimportant to 5=very important;
Source for German Data: Gfk consumer survey Textile-Seals 2006, ranking of the different aspects

3 CONSUMER SURVEY RESULTS

Consumer: RELEVANCE OF “TESTED FOR HARMFUL SUBSTANCES” FOR THE CHOICE OF CLOTHING AND TEXTILES (by age groups)

Relevance of "Tested for harmful substances" for the buying process	Product type	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7
19 - 25 years	<i>outerwear</i>	4.1	2.6	2.6	2.8	2.8	2.7	3.2	3.0
26 - 35 years		4.6	2.9	2.9	2.6	3.1	3.1	3.2	3.3
36 - 45 years		4.5	3.1	3.1	3.3	3.6	3.2	3.4	3.5
46 - 55 years		4.2	3.0	3.4	3.1	4.0	3.2	3.6	3.5
56 - 65 years		3.6	2.9	2.9	4.1	3.9	3.2	3.2	3.2
19 - 25 years	<i>Children-/ baby wear</i>	4.5	2.8	3.1	2.8	4.1	3.1	3.7	3.4
26 - 35 years		4.8	3.0	3.1	2.7	3.9	3.3	3.8	3.5
36 - 45 years		4.8	3.1	3.3	3.4	4.3	3.5	3.5	3.7
46 - 55 years		4.6	3.1	3.4	3.2	4.4	3.2	3.8	3.5
56 - 65 years		3.6	2.8	3.1	4.1	4.2	3.3	3.3	3.3
19 - 25 years	<i>Underwear/ beachwear</i>	4.4	2.8	2.8	2.8	2.8	3.0	3.2	3.1
26 - 35 years		4.6	2.9	3.0	2.6	3.4	3.2	3.3	3.4
36 - 45 years		4.6	3.1	3.3	3.3	3.8	3.4	3.4	3.6
46 - 55 years		4.3	3.0	3.3	3.1	4.0	3.2	3.6	3.5
56 - 65 years		3.6	2.7	3.1	3.9	4.1	3.0	3.3	3.3
19 - 25 years	<i>Home textiles</i>	4.1	2.7	2.4	2.6	2.9	3.0	3.1	3.0
26 - 35 years		4.6	2.9	2.3	2.5	2.8	3.4	3.1	3.2
36 - 45 years		4.6	3.2	2.8	3.1	3.4	3.4	3.4	3.5
46 - 55 years		4.3	3.1	2.7	2.9	3.6	3.3	3.7	3.3
56 - 65 years		3.5	2.7	2.5	3.5	3.8	3.1	3.2	3.0

Source: BBE RETAIL EXPERTS; Question 1: “How important are the following criteria for the choice of clothing and textiles?” scaled from 1=unimportant to 5=very important

Consumer: ATTENTION TO TEXTILE-SEALS WITH THE PURCHASE

- The question “Do you pay attention to textile-seals, that are tested for harmful substances, with your purchases?” was answered “very frequently” respectively “frequently” by 12%. 31% answered “sometimes”. In Switzerland the attention to textile-seals is above the average while two-thirds in Spain and three-fourth in Portugal answered “seldom” or “very seldom”.
- There are generally more women who pay attention to textile-seals. Referring to the age groups persons between 36 and 55 years more often do look out for according textile-seals than younger and older persons.

3 CONSUMER SURVEY RESULTS

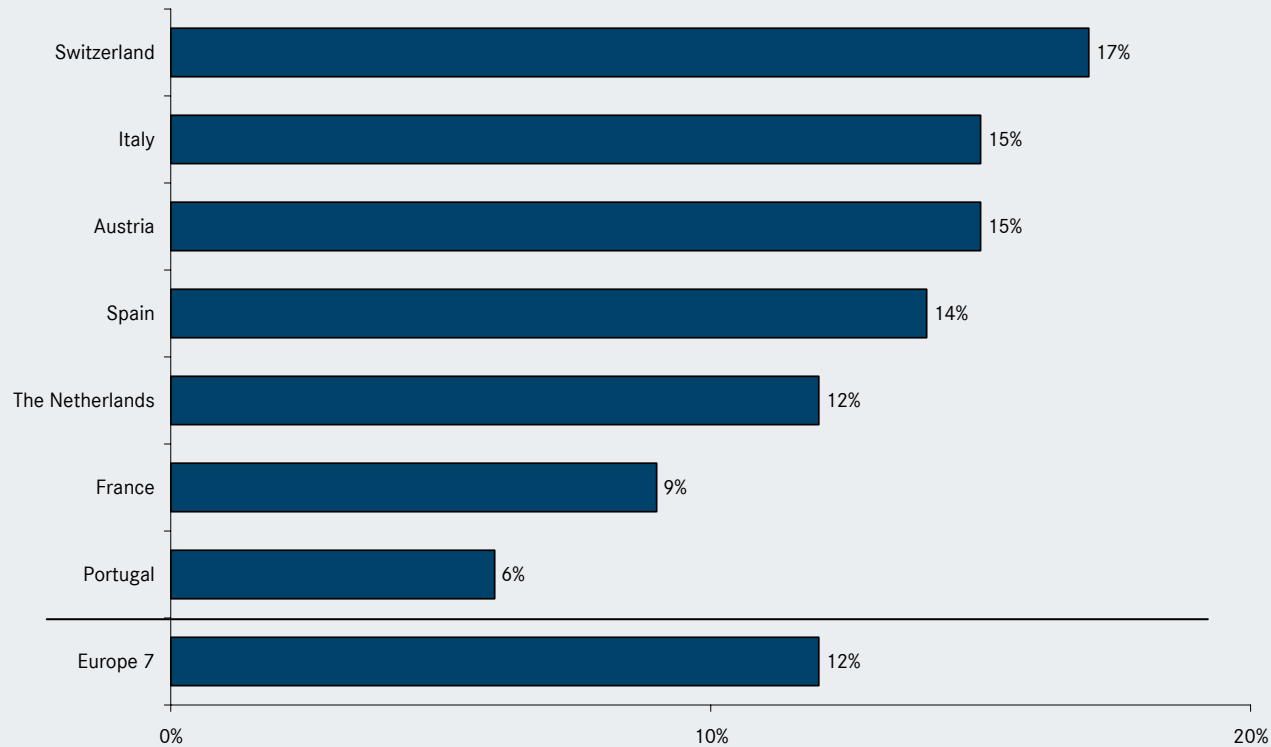
Consumer: ATTENTION TO TEXTILE-SEALS WITH THE PURCHASE

You regard textile certificates?	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
very frequently/frequently	15%	9%	14%	6%	17%	15%	12%	12%	18%
sometimes	31%	44%	19%	27%	22%	49%	28%	31%	25%
seldom/very seldom	54%	47%	65%	77%	62%	36%	60%	56%	57%

Source: **BBE** RETAIL EXPERTS; Question 2: “Do you pay attention to textile-seals, that are tested for harmful substances, with your purchases?”;
Source for German Data: Gfk consumer survey Textile-Seals 2006

3 CONSUMER SURVEY RESULTS

Consumer: ATTENTION TO TEXTILE-SEALS WITH THE PURCHASE (ranking of nations; answers “very often” and “often” accumulated)



Source: BBE RETAIL EXPERTS; Question 2: “Do you pay attention to textile-seals, that are tested for harmful substances, with your purchases?”

3 CONSUMER SURVEY RESULTS

Consumer: AIDED AWARENESS OF TEXTILE-SEALS

- The most relevant seals were identified within a pretest. The selected seals were shown to all questioned consumers with its graphic label.
- Therefore many interviewees could remember the symbol.



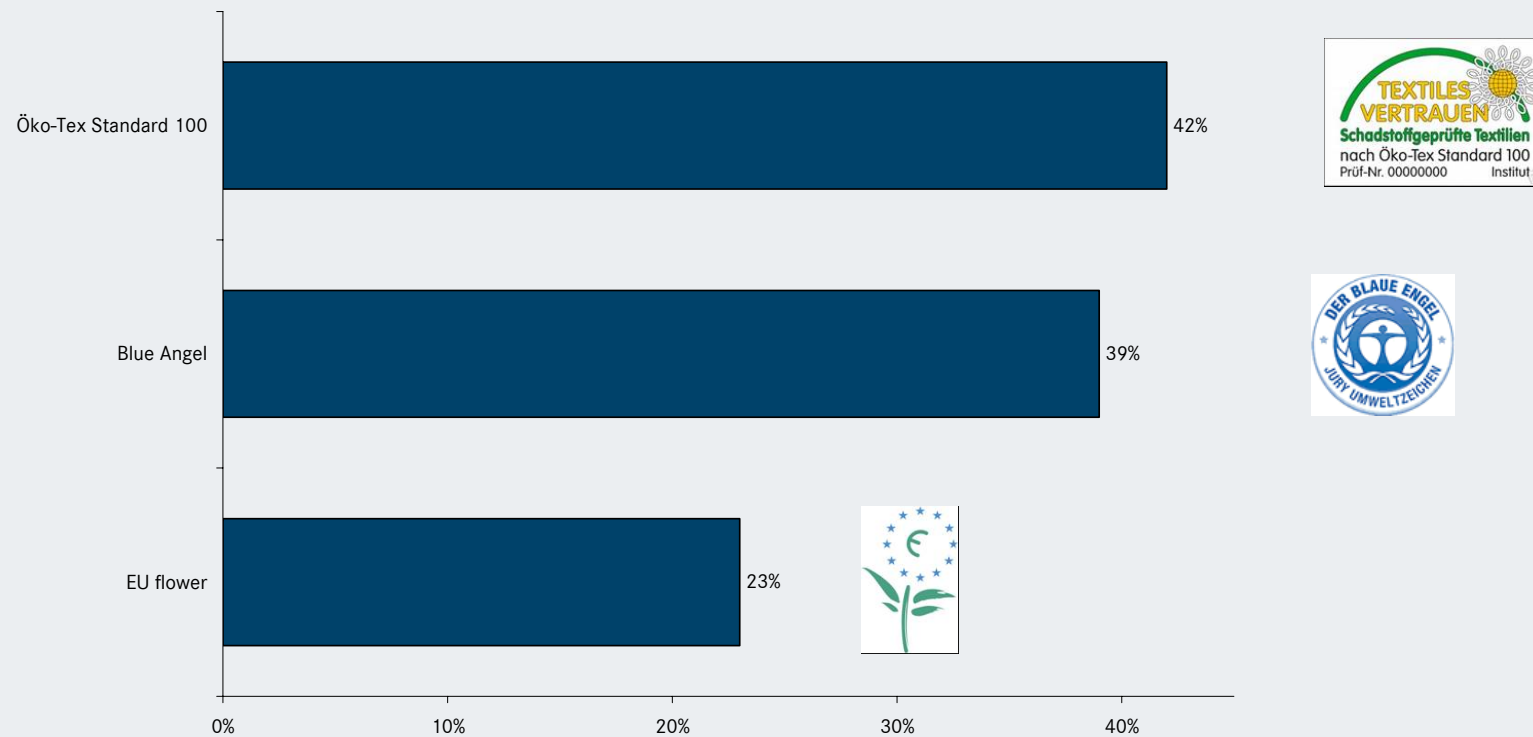
3 CONSUMER SURVEY RESULTS

Consumer: AIDED AWARENESS OF TEXTILE-SEALS

- The aided question – in Italy five seals were asked for, in Switzerland six – lead to following results: by 42% over all seven nations the Oeko-Tex® Standard 100 was the most famous seal. Superior result reached the Oeko-Tex® Standard 100 in Austria (81%), France (61%), Italy (50%) and Netherlands (49%).
- “The Blue Angel” also achieved satisfying results: 39% awareness over all seven nations, 73% in Austria, 66% in Italy and 53% in France.
- The other predetermined seals follow with a distance: EU Flower (27%) and Global Organic Textile Standard (16%).

3 CONSUMER SURVEY RESULTS

Consumer: AIDED AWARENESS OF TEXTILE-SEALS (Europe 8 countries with Germany)



Source: BBE european trend analysis 2008; Question 4: "Which of the following textile-seals do you know or did you notice during a purchase?"

3 CONSUMER SURVEY RESULTS

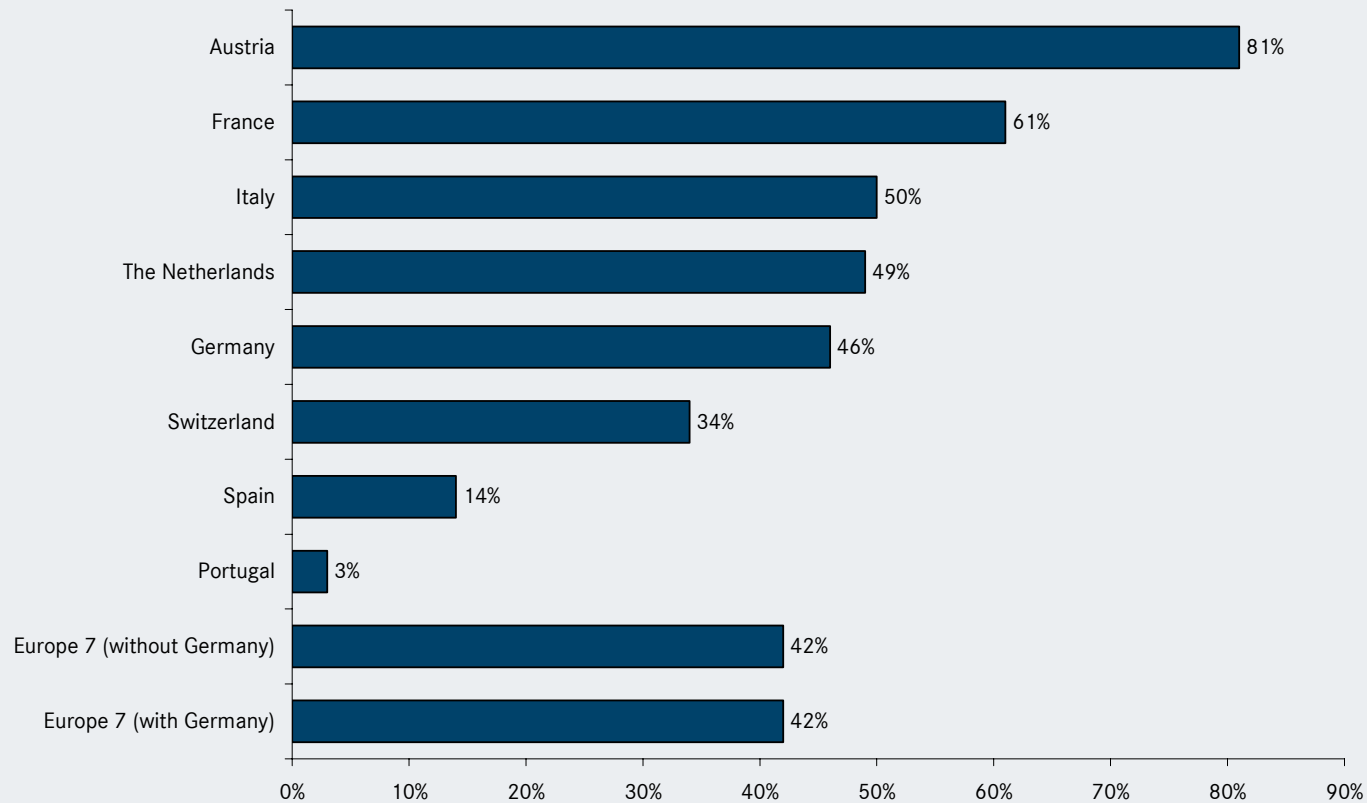
Consumer: AIDED AWARENESS OF TEXTILE-SEALS

Degree of brand awareness	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7	Germany
Öko-Tex Standard 100	50%	61%	14%	3%	34%	81%	49%	42%	46%
Blue Angel	66%	53%	20%	3%	33%	73%	17%	39%	49%
EU flower	42%	36%	36%	13%	7%	38%	8%	27%	1%
Global Organic Textile Standard	17%	29%	12%	2%	10%	18%	23%	16%	
Naturaline bio cotton					54%				
Eco-Label	10%				67%				

Source: **BBE** RETAIL EXPERTS; Question 4: "Which of the following textile-seals do you know or did you notice with a purchase?";
Source for German Data: Gfk consumer survey Textile-Seals 2006

3 CONSUMER SURVEY RESULTS

Consumer: AIDED AWARENESS OF THE OEKO-TEX® STANDARD 100



Source: BBE european trend analysis 2008; Question 4: "Which of the following textile-seals do you know or did you notice with a purchase?"
Germany = GfK consumer study Textile Seals 2006

Consumer: PREFERRED RETAIL CHANNEL FOR THE BUYING OF CLOTHING AND TEXTILES

- The preferred retail channels in Europe (seven nations) for the buying of clothing and textiles are retail chains with 57% of the answers. The retail channels in Portugal (77%), Netherlands (74%) and France (63%) show superior importance.
- Retail channels are followed by department stores with 48% - Spain and Portugal range above the average, Austria ranges below.
- Textile specialists rank at the third position – interviewees could give multiple answers. A superior position of the textile specialists can be recognized in Italy (63%). The fashion boutiques show similar relations: 34% in Europe (seven nations), 62% in Italy.
- Sports specialists could reach rank 5 with 30% (superior shares by male consumers), mail order trade could reach 11% (superior shares by 56 year old and older persons).

3 CONSUMER SURVEY RESULTS

PREFERRED RETAIL CHANNEL FOR THE BUYING OF CLOTHING AND TEXTILES

Preferred retail channel	Italy	France	Spain	Portugal	Switzerland	Austria	The Netherlands	Europe 7
Chains	25%	63%	51%	77%	52%	61%	74%	57%
Department stores	41%	45%	58%	63%	50%	38%	44%	48%
Textile specialist trade	63%	51%	15%	34%	25%	33%	39%	38%
Fashion boutiques	62%	26%	39%	22%	28%	23%	33%	34%
Sports specialist trade	59%	9%	31%	29%	36%	13%	30%	30%
Mail order	11%	12%	10%	12%	11%	13%	8%	11%

Source: BBE RETAIL EXPERTS; Question 5: "In which retail channel do you prefer to buy clothing and textiles?" (multiple answers possible)

SUMMARY

RETAIL SURVEY

- Within the retail survey, 1,400 retailers of the trade segments women's outerwear, men's outerwear, children's/baby wear, sportswear, home textiles and underwear/beachwear were asked by phone in Italy, France, Spain, Portugal, Switzerland, Austria and Netherlands.
- The most important aspects within the buying process of clothing and textiles are product quality, social aspects, skin kindness and "tested for harmful substances".
- The unaided awareness of textile seals and labels is slightly low. Most interviewees do not know any seal/label spontaneously. But the ones who know a seal/label mostly name the Oeko-Tex Standard.
- The aided question to the awareness of textile-seals/labels points out: on the average of all regarded nations the Oeko-Tex® Standard 100 has the highest awareness with 37%. In Switzerland the Oeko-Tex® Label shows the strongest performance, followed by Austria. In France (18%), Italy and Spain (each with 24%) the awareness is below average. The trade fair survey last year in Germany showed an awareness of 79%.
- Also positive is the degree of usage. Interviewees who know the Oeko-Tex® Standard use the seal in their assortment by superior shares. The other seals as the Global Organic Textile Standard, The Blue Angel and EU Flower are used less.

RETAIL SURVEY

- For three-fourth of the interviewees the aspect “tested for harmful substances” is (very) important.
- The question “Are in your opinion more labeled products and articles required, which are certified?” is mostly answered with a clear “yes”. On the average of all seven nations the accordance is by 79%.
- The relevance of “Tested for Harmful Substances” within the order process is regarded as high by the most interviewees. On the average of all seven nations 54% anticipate an increasing importance.
- The main source of information is conversation with producers. By far follows the internet
- Although the awareness of the Oeko-Tex® Standard 100 is satisfying in relation to other seals, only one-third of the interviewees feel well-informed about the seal. Stronger efforts could be made to communicate information. 36% of the interviewees wish for more information.

CONSUMER SURVEY

- Within the consumer survey 3,100 pedestrians aged between 14 and 65 years were asked in seven European countries. The survey period was September 2008.
- “Product quality” and “Price” are the most important aspects with the purchase of clothing and textiles. The importance of “Skin kindness” ranks on third position (scaled between 3.4 and 3.7).
- The criteria “Tested for harmful substances” is scaled highest in the segment of children’s/baby wear. In general this criteria ranks in the middle.
- Most consumers rarely pay attention to textile seals within the buying process. One-third looks occasionally for a seal, every tenth does it (very) frequently.
- The unaided question to the awareness of textile-seals shows that 75% of the interviewees cannot give a spontaneous answer. The other one-fourth named several hundred different labels. The Oeko-Tex® Standard was over all the mostly named seal. In particular women are aware of the Oeko-Tex® Standard.

CONSUMER SURVEY

- The aided question leads to the following results: by 42% over all seven nations the Oeko-Tex® Standard 100 was the most famous seal. The Oeko-Tex® Standard 100 reached superior results in Austria, France, Italy and Netherlands. Spain and Portugal ranged below the average. The GfK-survey in Germany showed an awareness of 46% in the year 2006.
- The preferred retail channels in Europe (seven nations) for the buying of clothing and textiles are retail chains with 57% of the answers. The retail channels show superior importance in Portugal (77%), Netherlands (74%) and France (63%).
- Retail channels are followed by department stores, textile specialists and fashion boutiques.
- In summary the results bring out a very satisfying situation for the Oeko-Tex® Standard. Now this situation should be confirmed and developed by continuous marketing activities. The ascertained awareness of the textile-seal in many consumers minds is a suitable argument for an increased labeling and the usage of labeled products in the retail assortment.