



GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: GERMANY

APPAREL SPENDING

German consumers spent \$73 billion on clothing in 2017, continuing its steady growth since the global recession of 2008. Consumer spending on apparel is expected to continue expanding for a 39% growth by 2030. Reach savvy German consumers with integrated digital and traditional marketing and versatile, high quality clothing offerings.



KEY TRENDS



How They Shop: Help consumers plan clothes shopping with cohesive online and in-person campaigns.

What They Shop: Meet consumer demands for comfort and quality with cotton-rich basics and outerwear.

Spotlight on Denim Jeans: Reach denim-hungry German consumers with communication about denim jeans' versatility, comfort, and style.

FINANCIAL OUTLOOK



OPTIMISTIC

Germany	Global
47%	56%

PESSIMISTIC



Germany	Global
11%	11%

* "Neither Optimistic/Pessimistic" not shown

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HOW THEY SHOP

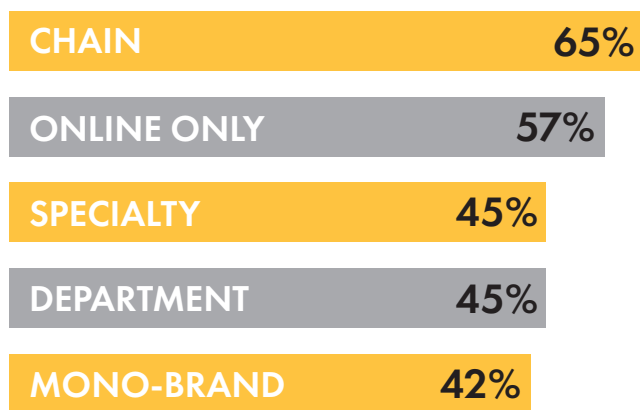
German consumers shop at four types of stores on average - the most of all ten countries studied - both online and in-store. Nine in ten (89%) Germans use the internet at least weekly and nearly all (96%) have shopped for clothing online. With impulse buying on the decline, German consumers gather clothing inspiration online via social media and retail resources, as well as using in-person sources such as friends and in-store displays. Offer integrated online and in-person communication to help German consumers plan their clothes shopping.

SHOPPING JOURNEY

Consumers who prefer shopping in-store vs. online



RETAIL STORES SHOPPED FOR CLOTHING

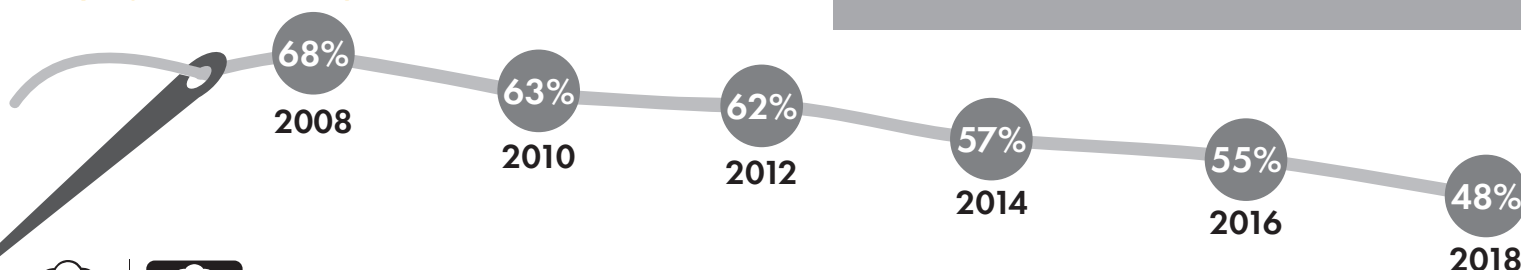


48%

Shop online at least once per month.

APPAREL SHOPPING HABITS

Buying Clothes on Impulse



SOURCES FOR CLOTHING IDEAS



Other People
54%



Window Shopping
34%



Brand & Retailer Digital Resources
28%



Store Publications
26%



Traditional Media
21%

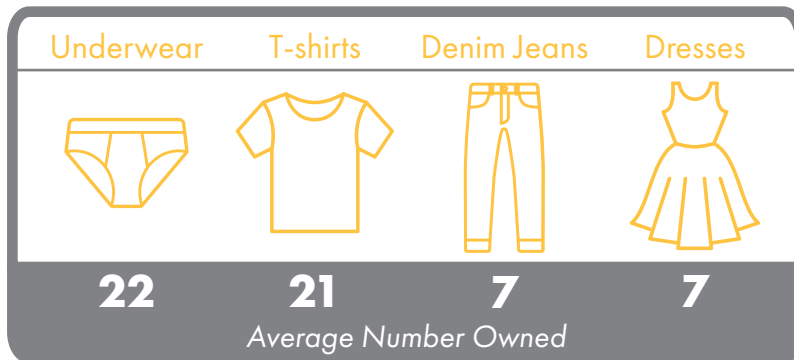


Social Media
14%

WHAT THEY SHOP

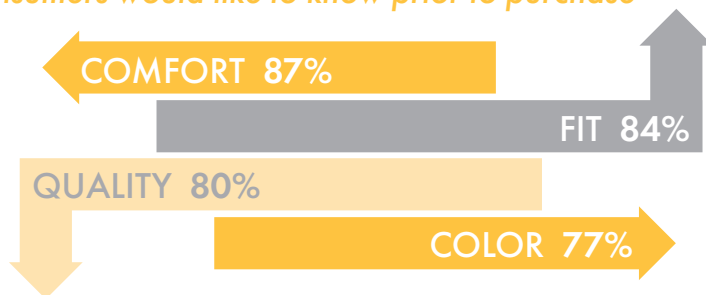
German consumers look for comfort and quality in their clothing, and are willing to pay more to find that quality. They own many basics – the most underwear and t-shirts of consumers in any country studied – and pair these with denim jeans, dresses, and other fashionable outerwear. Germans look for cotton in their most-worn clothing and especially prefer the fiber for bottomsweat and babywear. Offer basics and outerwear in cotton-rich fabrics that provide the quality and function German consumers seek.

TOP ITEMS OWNED

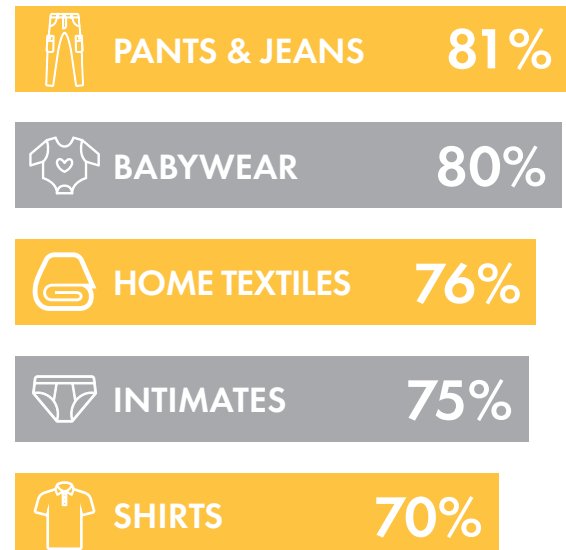


PRIMARY PURCHASE DRIVERS

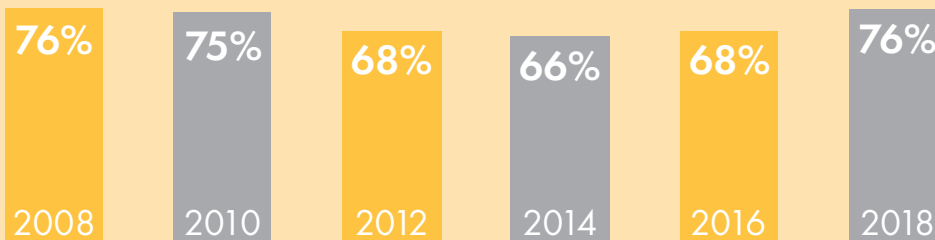
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER

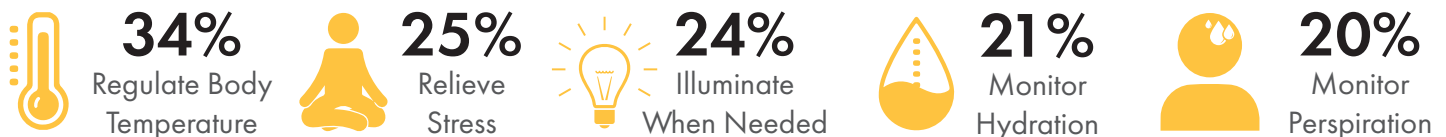


PAY MORE FOR BETTER QUALITY



PERFORMANCE APPAREL

Likely to Purchase



SPOTLIGHT

DENIM JEANS

ENJOY OR LOVE DENIM



81%

Germany



66%

Global

Denim is the overwhelming choice of German consumers when they want to blend fashion, function, and comfort. Germans own an average of seven pairs of jeans, the most of any consumers outside Latin America. The garment is a fashion item, particularly for younger German consumers, and is prized for its comfort by older consumers. White and blue collar workers view jeans as functional and stylish workwear, as nearly half wear them five or more days per week. Market denim's fashion, function, and comfort to German consumers looking for bottomsweat suitable for many occasions.

DENIM JEANS TOP CHOICE BY OCCASION



78%

RUNNING
ERRANDS



71%

AT
WORK



52%

OUT TO
DINNER



43%

TO LOOK &
FEEL GOOD

DENIM JEANS FOR FASHION AND COMFORT

Consumers Who Prefer Denim Jeans When They Want To Be:

FASHIONABLE

34% **31%**



COMFORTABLE

23% **30%**



● under 35 ● 35+

91%

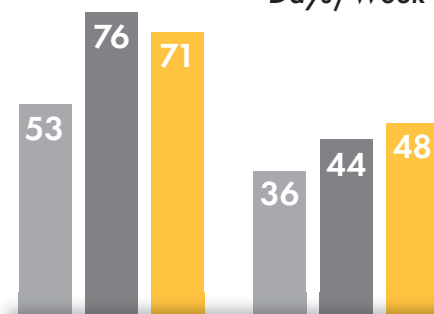
PREFER DENIM, COTTON,
OR COTTON-BLENDS FOR
THEIR JEANS

EMPLOYMENT & DENIM JEANS

Percentage Of Consumers Who:

*Prefer Jeans
For Work*

*Wear Jeans
Five+
Days/Week*



■ Professional/Executive
■ White Collar/Administrative
■ Blue Collar

Source: Cotton Council International and Cotton Incorporated's Global Lifestyle Monitor Survey, a biennial consumer research study. In the 2018 survey approximately 10,000 consumers (i.e. 1,000 consumers in 10 countries) were surveyed.
External Source: 'Euromonitor International

