GLOBAL CONSUMER

INSIGHTS

GLOBAL LIFESTYLE MONITOR: INDIA

APPAREL SPENDING

Indian consumers spent $87.9 billion on clothing in 2017, representing 6% of all consumer expenditures. Spending on clothing is expected to keep pace with projected growth in the economy overall, for a total 148% increase in clothing expenditures by 2030. Seize opportunities in this market with online investment and cotton-rich traditional clothing and menswear.

INDIA
$87.9'
+148% growth

US
$338.9
+56% growth

EU
$374.5
+52% growth

CHINA
$277.2
+193% growth

KEY TRENDS

How They Shop: Get ahead of online shopping trends by investing in mobile platforms while reaching today's Indian shoppers in-store and via traditional media.

What They Shop: Provide the quality, fit, and durability consumers seek with high cotton-rich traditional clothing and menswear.

Spotlight on Gender Differences: Meet the differing needs of Indian women and men with product offerings and retail experiences suited to their shopping habits.

FINANCIAL OUTLOOK

OPTIMISTIC

India	Global
90%	56%

PESSIMISTIC

India	Global
1%	11%

*"Neither Optimistic/Pessimistic" not shown

COTTON USA

cotton

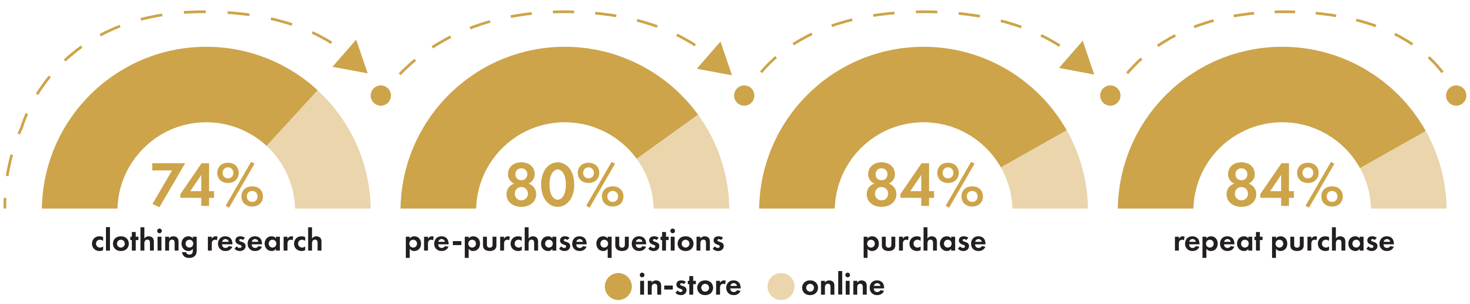
GLOBAL LIFESTYLE MONITOR: INDIA

HOW THEY SHOP

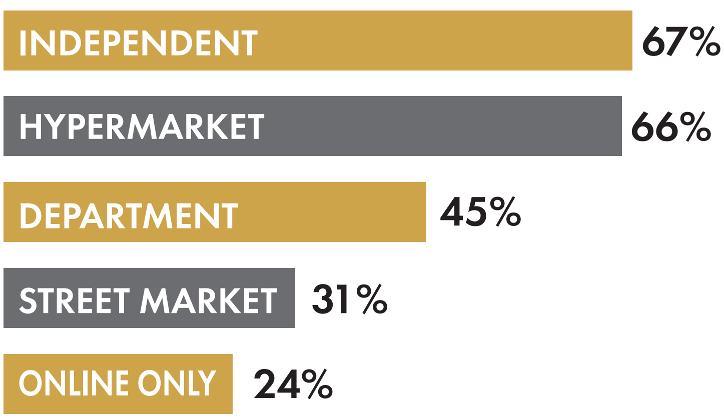
Indian consumers are interested in shopping online, but with just 27% of the population using the internet regularly (weekly or more)[1], lack of internet access prevents widespread online shopping. However, it's projected that 90% of the population will own a smartphone in the next 10 years[1], indicating a strong future demand in mobile shopping. Small, independent shops and traditional street markets are frequent shopping destinations, along with hypermarkets and department stores. Reach Indian shoppers in-store and via traditional media while growing mobile platforms to meet future online shopping demands.

SHOPPING JOURNEY

Consumers who prefer shopping in-store (vs. online)



RETAIL STORES SHOPPED FOR CLOTHING



15% Shop online at least once per month.

SOURCES FOR CLOTHING IDEAS

Other People **87%**

Traditional Media **54%**

Store Publications **28%**

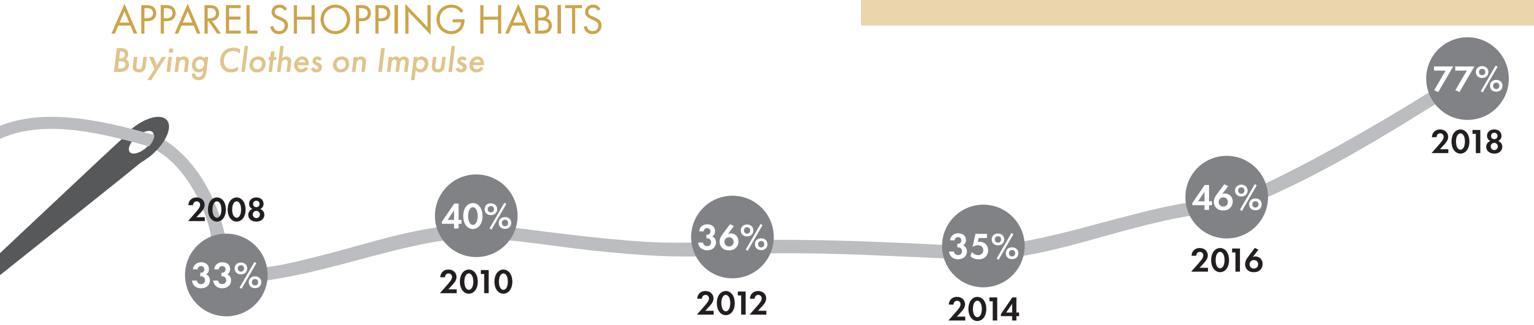
Window Shopping **26%**

Brand & Retailer Digital Resources **24%**

Social Media **22%**

APPAREL SHOPPING HABITS

Buying Clothes on Impulse



WHAT THEY SHOP

Fit, durability, quality, and finish are important clothing factors to Indian consumers, and nine in ten choose cotton-rich fabrics for garments of all types. Dresses and traditional clothing such as saris comprise nearly half (43%) of women's wardrobes, while men own both dress and casual pants and shirts. Indian consumers value quality in clothing, as nine in ten are willing to pay more for quality. Offer high quality, cotton-rich traditional clothing and menswear with a superior fit.

TOP ITEMS OWNED

Trad. Attire	Dresses	Underwear	T-shirts
12	8	6	5

Average Number Owned

COTTON AS PREFERRED FIBER

JEANS & PANTS	93%
BABYWEAR	91%
HOME TEXTILES	91%
SHIRTS	90%
INTIMATES	86%

PRIMARY PURCHASE DRIVERS

Consumers would like to know prior to purchase

FIT 89%

COMFORT 88%

QUALITY 88%

FINISH 88%

PAY MORE FOR BETTER QUALITY

2008	2010	2012	2014	2016	2018
77%	73%	81%	82%	72%	90%

91% prefer cotton or cotton blends for their most-worn clothing

PERFORMANCE APPAREL

Likely to Purchase

78%	Relieve Stress
78%	Regulate Body Temperature
78%	Manage Mood/Emotions
76%	Monitor Perspiration
76%	Monitor Blood Oxygen

SPOTLIGHT

GENDER DIFFERENCES IN SHOPPING

SHOP MONTHLY OR MORE

	Women	Men
India	29%	42%
Globally	51%	44%

Men and women shop for clothing quite differently in India. While nearly all (95%) Indian women enjoy clothes shopping, they break from the global trend as they report shopping for clothes less often than their male counterparts. As just 27% of Indian women work outside the home[2] – among the lowest worldwide - men are more likely to buy Western clothing in specialty and chain stores, while women frequent tailor-made shops for traditional clothing. Adapt retail experiences to women and men with offerings suited to their differing clothing and shopping preferences.

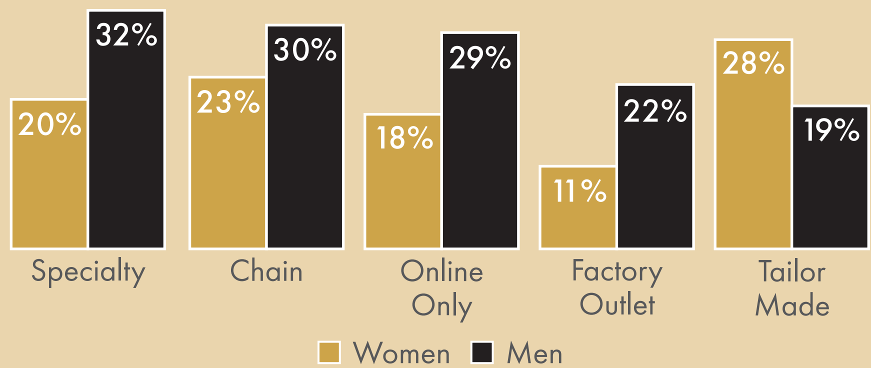
SHOP FOR OTHERS

64% Women

54% Men

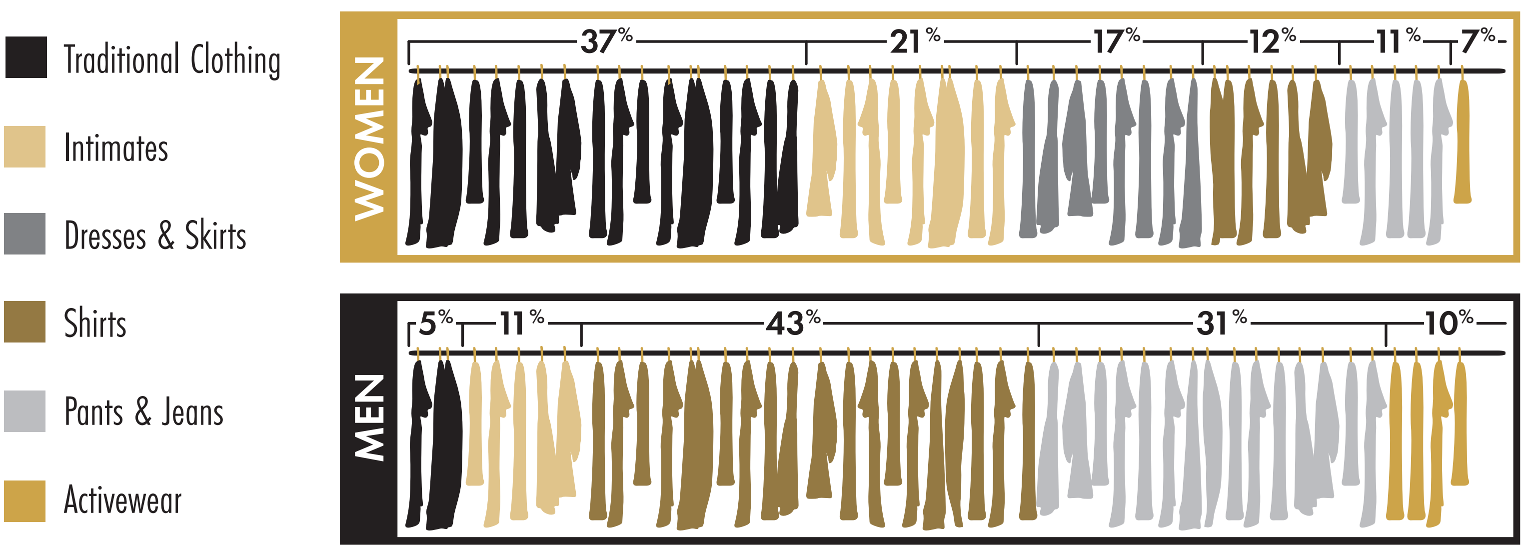
RETAIL STORES SHOPPED FOR CLOTHING

Significant Percentage Differences by Gender



WHAT'S IN THE CLOSET?

Percentage of Total Wardrobe



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: [1]Euromonitor International, [2]WorldBank.

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