

GLOBAL CONSUMER INSIGHTS



GLOBAL LIFESTYLE MONITOR: ITALY

APPAREL SPENDING

Italian consumers spent \$60 billion on clothing in 2017, or \$990 per person. After a period of ups and downs, spending is expected to grow steadily 40% by 2030. With lower than average optimism about their personal finances, Italian consumers mix price-consciousness with a desire for well-made, fashionable, and functional clothing.



KEY TRENDS



How They Shop: Pair online inspiration with dynamic in-person experiences for an integrated shopping journey.

What They Shop: Help consumers look and feel good with quality basics and performance clothing made with cotton-rich fabrics.

Spotlight on Fiber Content: Speak to Italian consumers' concern for quality workmanship with clear fiber content information displayed online and labeled on garments.

FINANCIAL OUTLOOK

OPTIMISTIC
 Italy: 33%
 Global: 56%

PESSIMISTIC
 Italy: 16%
 Global: 11%

* "Neither Optimistic/Pessimistic" not shown

HOW THEY SHOP

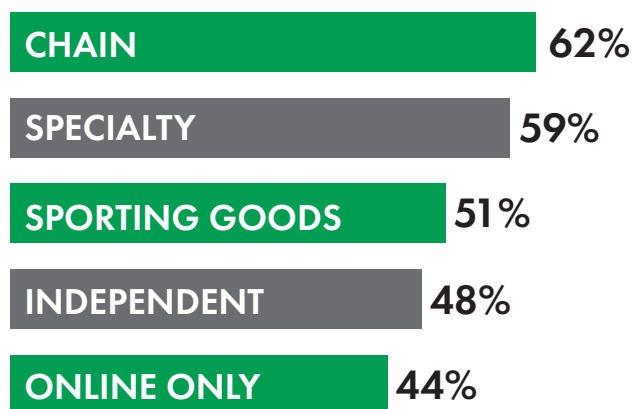
Italian consumers enjoy shopping for clothes (77%) both in-store and online. While regular (weekly or more) internet use (70%) is below the EU (81%)¹, over nine in ten (93%) Italians have used the internet to shop for clothing, most often to gather ideas and research prices. Two-thirds (67%) of Italian consumers also enjoy the experience of shopping for clothes in a physical store, preferring to make their purchases in person. Optimize digital resources to provide clothing ideas and information while investing in dynamic in-person retail experiences.

SHOPPING JOURNEY

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

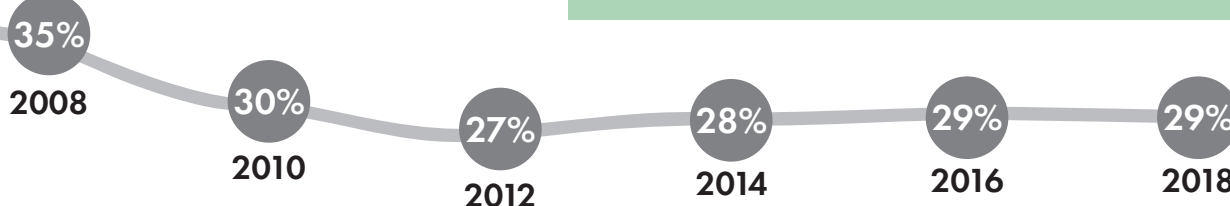


RETAIL STORES SHOPPED FOR CLOTHING



APPAREL SHOPPING HABITS

Buying Clothes on Impulse



SOURCES FOR CLOTHING IDEAS



Other People
50%



Window Shopping
44%



Traditional Media
30%



Store Publications
27%



Brand & Retailer Digital Resources
25%

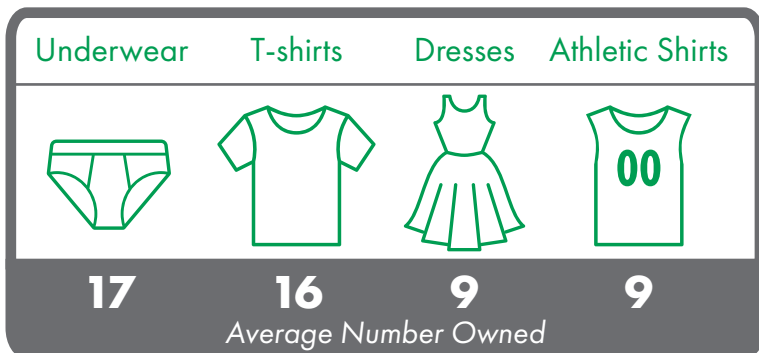


Social Media
15%

WHAT THEY SHOP

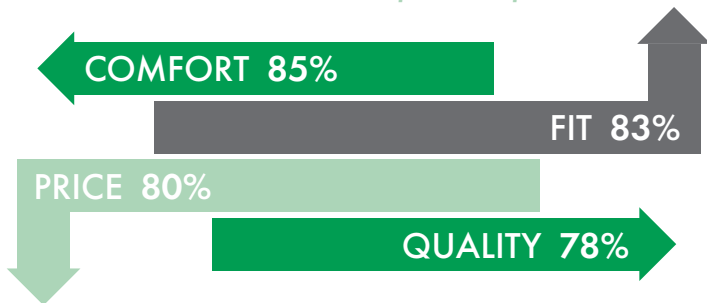
Italian consumers look for clothes that provide comfort, fit, and quality at the right price, leading them to prefer cotton-rich fabrics for their most-worn clothing. Like other Europeans, they own many basic garments, including underwear and t-shirts. They want their clothing to perform, as one-third to one-half say they are likely to purchase clothing that can monitor and address physical processes such as temperature and hydration. Mix comfort, performance, and quality by offering selection of price-conscious basics and performance clothing made with cotton-rich fabrics.

TOP ITEMS OWNED

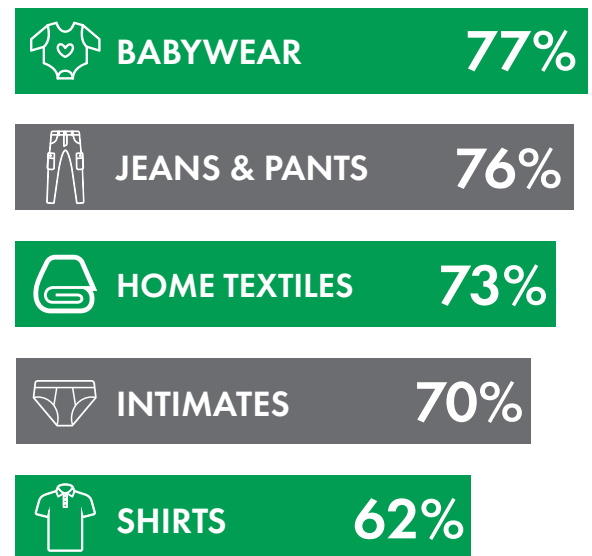


PRIMARY PURCHASE DRIVERS

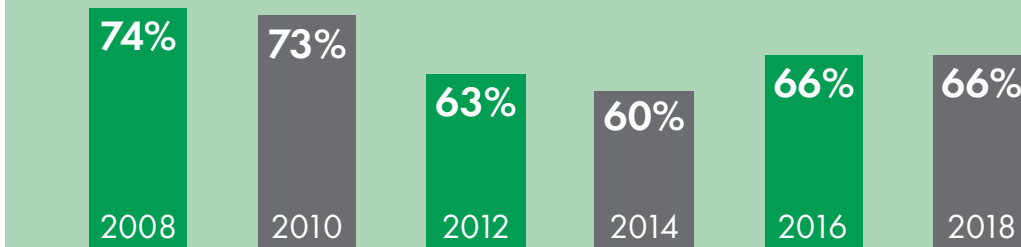
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER



PAY MORE FOR BETTER QUALITY



PERFORMANCE APPAREL

Likely to Purchase



48%

Regulate Body Temperature



43%

Relieve Stress



40%

Monitor Hydration



37%

Monitor Perspiration



34%

Illuminate When Needed

SPOTLIGHT

FIBER CONTENT

OFTEN LOOK FOR FIBER CONTENT LABELS PRIOR TO PURCHASE



76%
Italy



56%
Globally

Consumers in Italy care about the fiber content of their clothing. Three in four (76%) say they always or usually check the fiber content label on clothing before purchase, compared to 56% of consumers globally clothing. Almost half (47%) specifically seek or avoid particular fibers, most often looking for cotton when purchasing clothing. For these consumers, cotton signals authenticity, reliability, and sustainability. Meet this consumer need by offering cotton-rich clothing with prominently displayed fiber content information.

LOOK FOR FIBER CONTENT LABELS



71%
would pay more
for clothing
made from
natural fibers

CLOTHING FIBER CHOICE *Consumers Who Seek or Avoid Particular Fibers*



COTTON
SEEK **90%**
AVOID **<1%**



OTHER NATURAL
SEEK **65%**
AVOID **10%**



SYNTHETIC
SEEK **25%**
AVOID **79%**

COTTON CLOTHING ATTRIBUTES

Consumers Who Say The Following Attributes Best Describe Cotton Clothing

81%

MOST
AUTHENTIC

77%

MOST
RELIABLE

77%

MOST
SUSTAINABLE

74%

MOST
TRUSTWORTHY

70%

MOST
COMFORTABLE

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'

