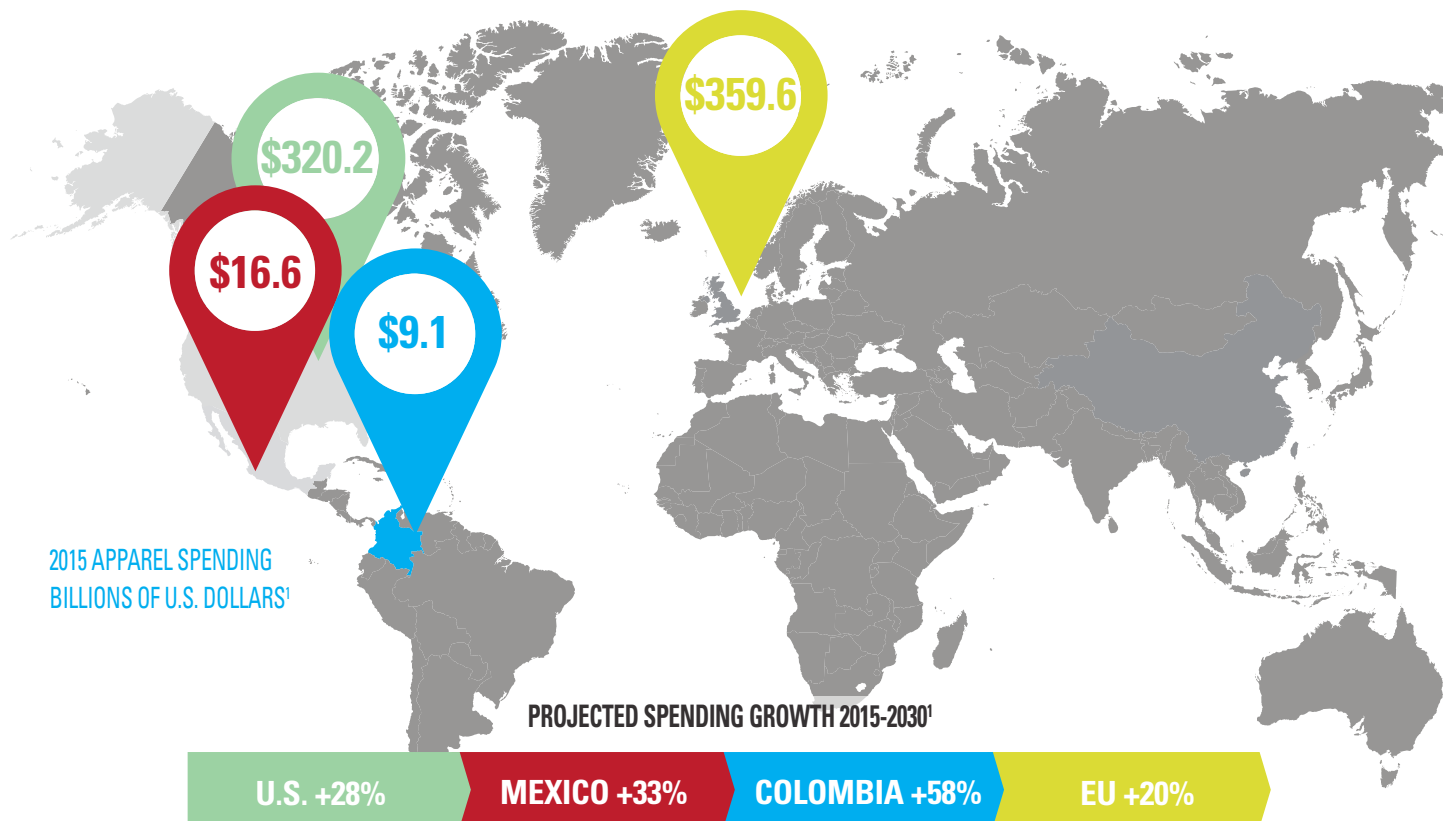


GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: COLOMBIA



APPAREL SPENDING



KEY TRENDS



SPENDING

Colombia's apparel market is projected to be one of the fastest growing apparel markets in Latin America over the next 15 years.



SHOPPING

Gaining customer loyalty will require coordinated efforts to develop a ground up, strong word-of-mouth campaign for brand and retailers.



OMNICHANNEL

Drawing traffic to your webpages will entail elevated shopping experiences that make customers comfortable with buying clothing online.



SUSTAINABILITY

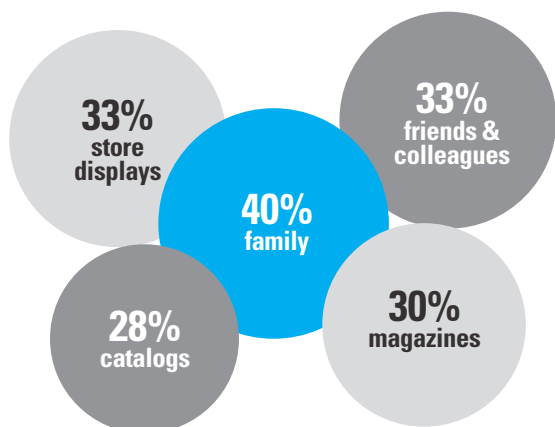
Colombian shoppers view cotton-rich offerings as more sustainable than those made from manmade fibers such as polyester and rayon.

GLOBAL LIFESTYLE MONITOR: COLOMBIA

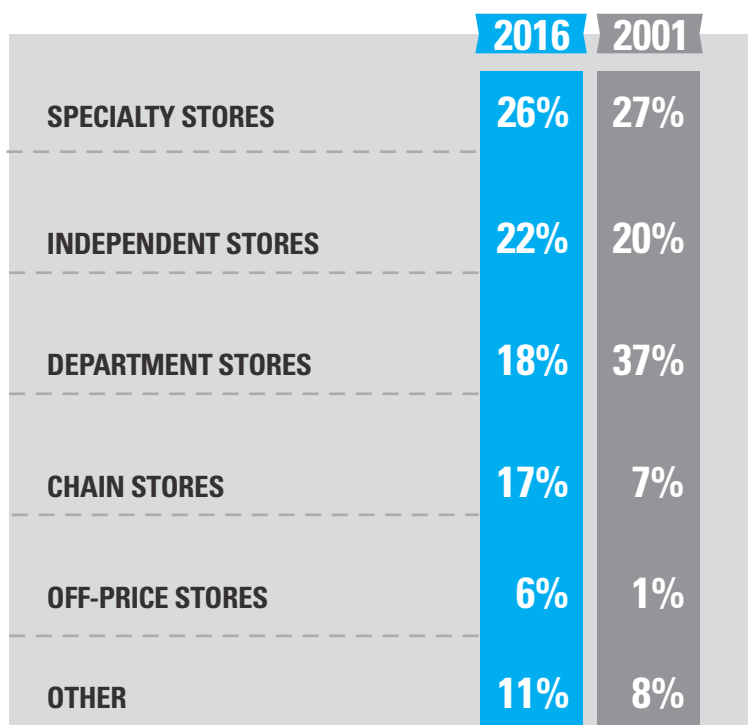
APPAREL SHOPPING ATTITUDES & HABITS

Colombian consumers' love of clothes shopping has remained strong and their shopping frequency has increased over the past fifteen years. However, they have shifted their purchases to lower-priced retail channels. Because family, friends, and social media are the top sources of fashion inspiration among Colombian consumers, gaining customer loyalty will require coordinated efforts to develop a ground up, strong word-of-mouth campaign for brand and retailers.

TOP SOURCES OF CLOTHING IDEAS



RETAIL CHANNELS SHOPPED MOST OFTEN



APPAREL SHOPPING HABITS



@ 2 in 3 consumers say social media websites are their top online source of clothing inspiration.

TOP 5 CLOTHING PURCHASE DRIVERS

comfort



quality



fit



style



durability



OMNICHANNEL SHOPPING

Fewer than 1 in 5 Colombian consumers shop for clothing online. These shoppers do not have a specific destination in mind, but rather they utilize social media, e-commerce sites, and retailer sites to inspire their online shopping journey. In addition, about 7 in 10 shoppers are concerned with tactile issues as well as security issues when buying clothing on the internet. In order to take advantage of the strong projected growth in online spending, brands will need to draw traffic to their own webpages through elevated shopping experiences that make customers comfortable with the online buying experience.

TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



84%

clothing quality



78%

card security



75%

information
privacy



72%

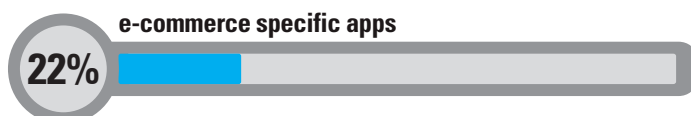
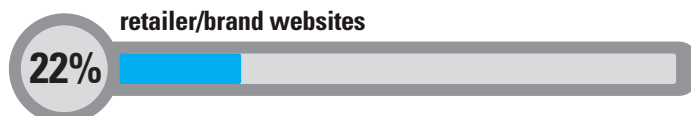
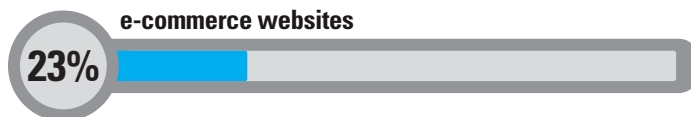
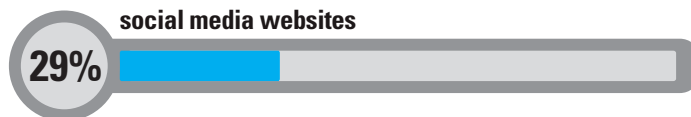
inability to try on
clothes



70%

return policies

WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

- 72%** up-close views
- 69%** views in multiple colors
- 68%** detailed size information
- 64%** fiber content information
- 61%** detailed fit information



Online apparel & footwear sales are projected to grow 146% from \$190MM in 2015 to \$468MM by 2020¹.

14% SHOP FOR CLOTHING ONLINE & USE THE INTERNET TO...

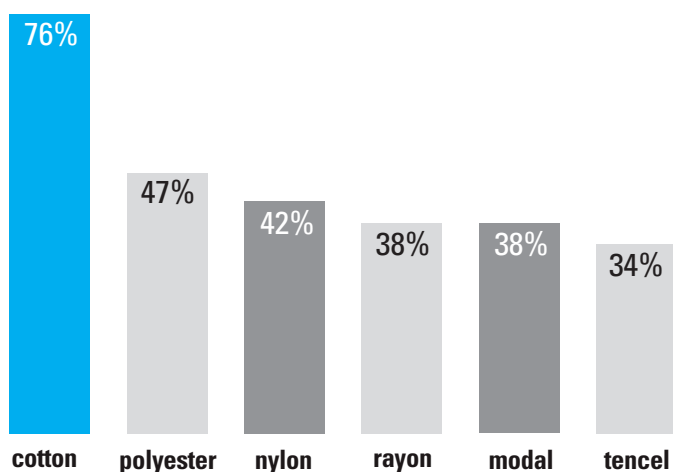


GLOBAL LIFESTYLE MONITOR: COLOMBIA

SEEKING SUSTAINABLE APPAREL

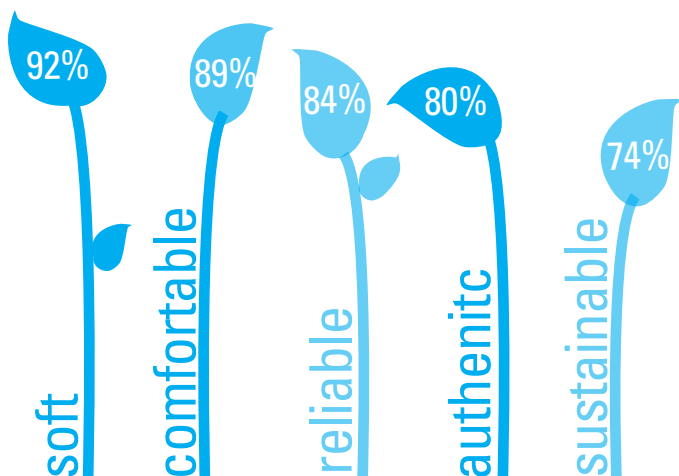
Although Colombian consumers say sustainability is important in their apparel purchases, less than half actively seek it out. However, the majority holds the industry responsible for apparel produced in a non-sustainable manner. Most Colombian shoppers consider cotton-rich offerings safer for the environment than those made from manmade fibers, offering the industry the opportunity to meet their customers' sustainable needs by providing their fiber of choice.

% SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



 79% of consumers prefer cotton-rich clothing.

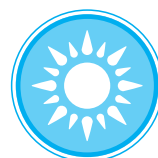
COMPARED TO CLOTHING FROM MANMADE FIBERS, COTTON IS VIEWED AS THE MOST...



TOP SUSTAINABILITY/SOCIAL CONCERNS



**WATER
SCARCITY** 95%



**GLOBAL
WARMING** 94%



**AIR
QUALITY** 93%



**FOOD
SAFETY** 93%

SUSTAINABILITY...

is important in my apparel purchase.

85%

when it's lacking,
I blame the industry.

57%

is something I seek
in my apparel.

48%

TOP CONCERNS REGARDING COTTON PRODUCTION

1. Amount of water used
2. Amount of chemicals & pesticides used
3. Greenhouse gas emissions



COTTON SUSTAINABILITY FACTS

U.S. cotton farmers have reduced pesticide applications by **HALF** over the past 30 years.

Over the past two decades, U.S. cotton farmers have improved water efficiency by approximately 80%.

DISCOVER WHAT COTTON CAN DOSM at
CottonToday.CottonInc.com.



Source: Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2016 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. External Source: Euromonitor International