

## GLOBAL LIFESTYLE MONITOR: COLOMBIA

## SATISFYING CONSUMER QUALITY EXPECTATIONS

## IMPORTANCE OF QUALITY

More than 9 in 10 Colombian shoppers say that clothing quality impacts their decision to purchase.



95%

Quality is important in clothing purchases



71%

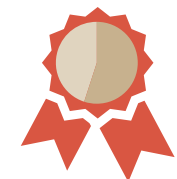
Expect to wear new clothing purchases longer than before



77%

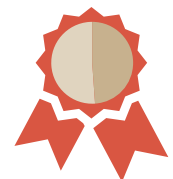
Willing to pay more for better quality clothes

## DEFINITION OF GOOD QUALITY CLOTHING



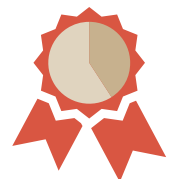
55%

Made of good/strong fibers



49%

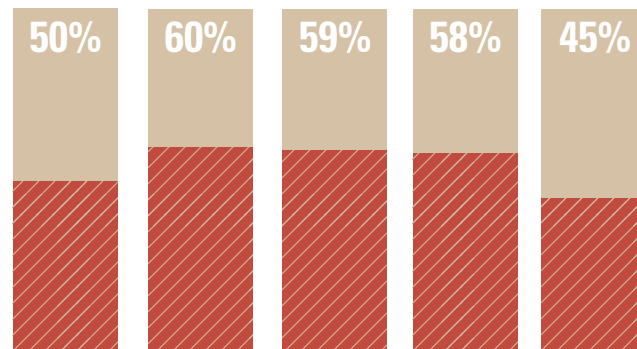
Durable/long-lasting



41%

No fading

## CONSUMER ASSESSMENT OF CLOTHING OFFERED AT RETAIL



Say they are paying higher clothing prices

Noticed fiber substitution away from cotton

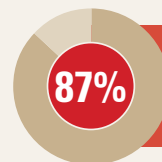
Say clothing fabrics are thinner

Say clothing durability has declined

Say clothing quality has declined

## COTTON MEETS CONSUMERS' EXPECTATIONS

Most Colombian consumers (93%) describe cotton as good quality.



Say cotton and cotton blends are their favorite fibers.

## REACTION TO FIBER SUBSTITUTION

Consumers have noticed that other fibers have been substituted for cotton in clothing and the vast majority of Colombian consumers (73%) say they are willing to pay more to keep cotton in their clothing.

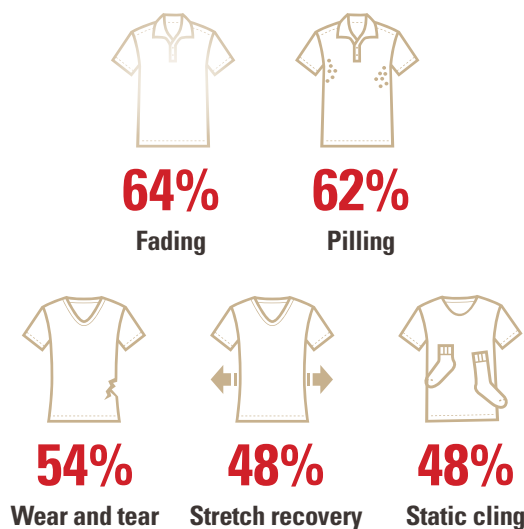


Bothered by fiber substitution away from cotton



Willing to pay more to keep cotton in their clothing

## WHAT ARE THE TOP ISSUES CONSUMERS ARE EXPERIENCING WITH THEIR CLOTHING PURCHASES?



## INSIGHTS

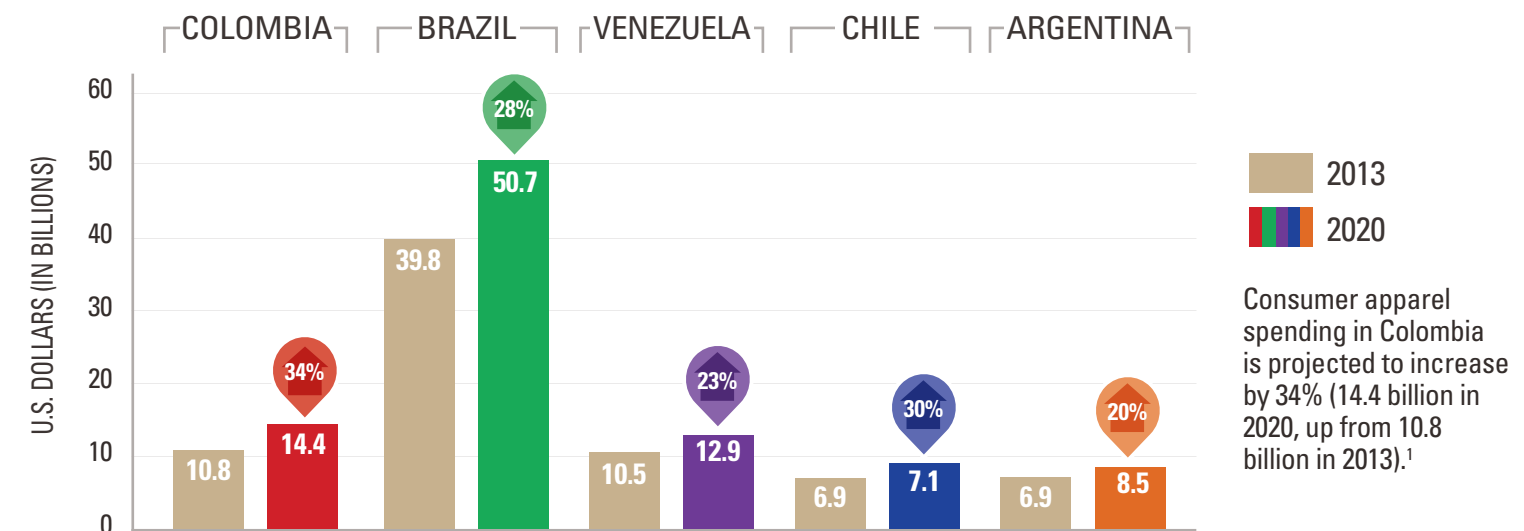


## GLOBAL LIFESTYLE MONITOR: COLOMBIA

Colombian consumers say that they are *paying more money and getting less value from their clothing*. Understanding apparel shoppers' behaviors, quality expectations, and clothing preferences is essential for brands and retailers to optimize sales in this growing market.



## APPAREL SPENDING OUTLOOK: 2013 VS. PROJECTED SPENDING IN 2020



## KEY TRENDS AMONG COLOMBIAN SHOPPERS



Colombia is projected to be one of the fastest growing apparel markets in Latin America and is projected to become the second largest apparel market in the region by 2020.



While Colombians are shopping for clothing more frequently than in the past and choosing more fashion-forward specialty stores to shop, their shopping habits remain sensible.



Quality is the most important driver for apparel purchases, but the majority of Colombians say they are paying more and getting less value from their clothing.



Experiences with performance issues like fading, wear and tear, and pilling may be why more than 7 in 10 are bothered by fiber substitution away from cotton.

**Source:** Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2014 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. External Source: Euromonitor International<sup>1</sup>

GLOBAL LIFESTYLE MONITOR: COLOMBIA

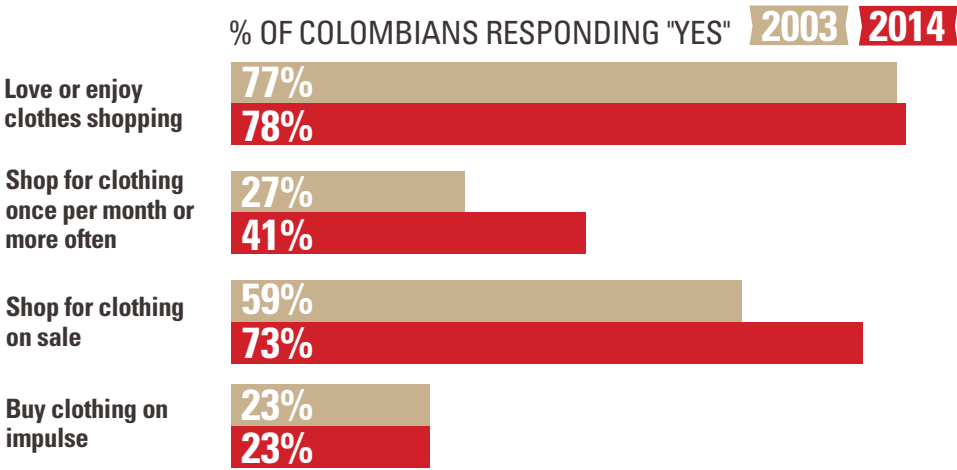
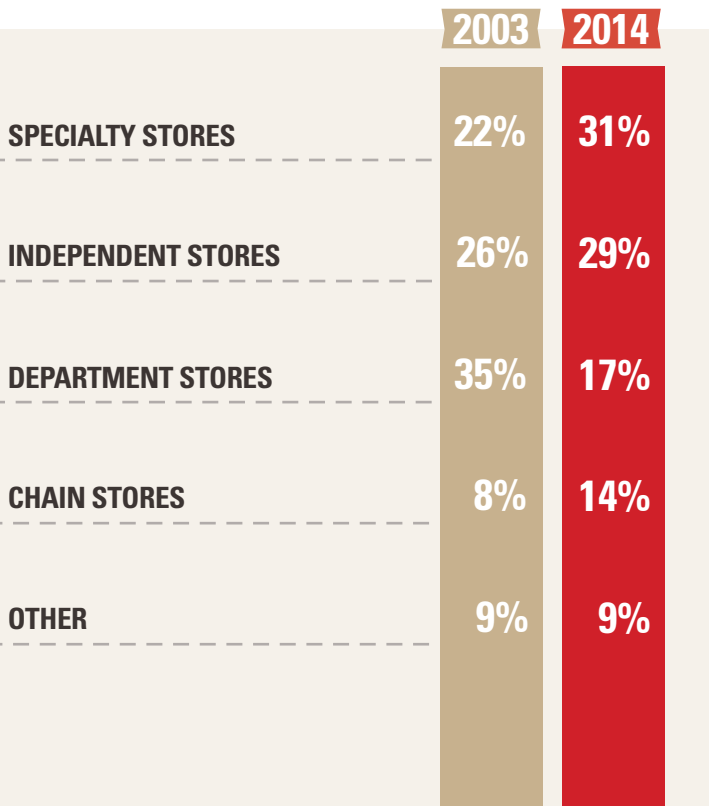
CONSUMER APPAREL SHOPPING ATTITUDES AND HABITS

Almost 8 in 10 Colombian consumers say that they love or enjoy clothes shopping, a sentiment that has remained strong over the past decade.

From 2003 to 2014, consumer shopping frequency increased significantly. Similar to other global consumers, Colombians tendency to shop for clothing on sale has increased. Over the past decade, impulse clothing purchases held steady at 23%.

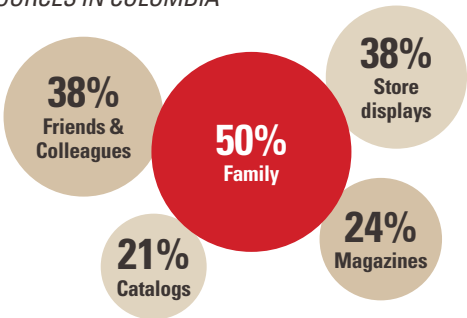
WHAT RETAIL CHANNELS ARE SHOPPED THE MOST FOR CLOTHING IN COLOMBIA?

Consumer preference for shopping at department stores for most of their clothing declined significantly, while inclinations to shop at all other retail channels rose or remained the same in the past decade. Colombians report that specialty stores are their top destination for shopping for most of their clothes.



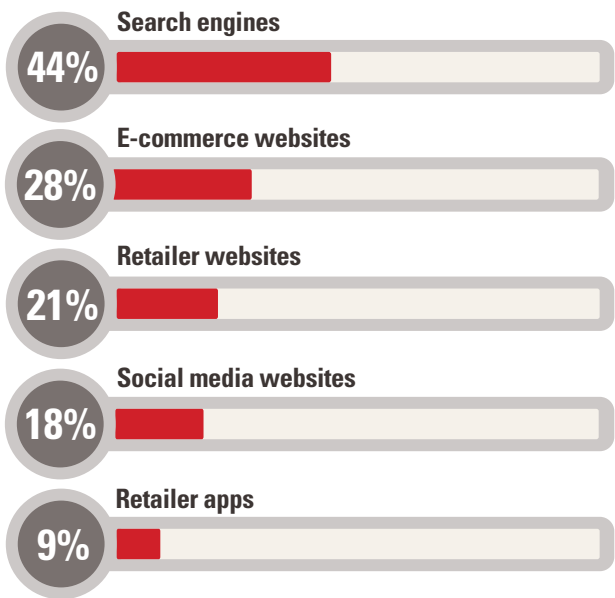
WHAT ARE CONSUMERS' TOP SOURCES OF IDEAS FOR NEW CLOTHES?

TOP 5 SOURCES IN COLOMBIA



WHERE ARE THE TOP PLACES CONSUMERS START SHOPPING ONLINE FOR CLOTHING?

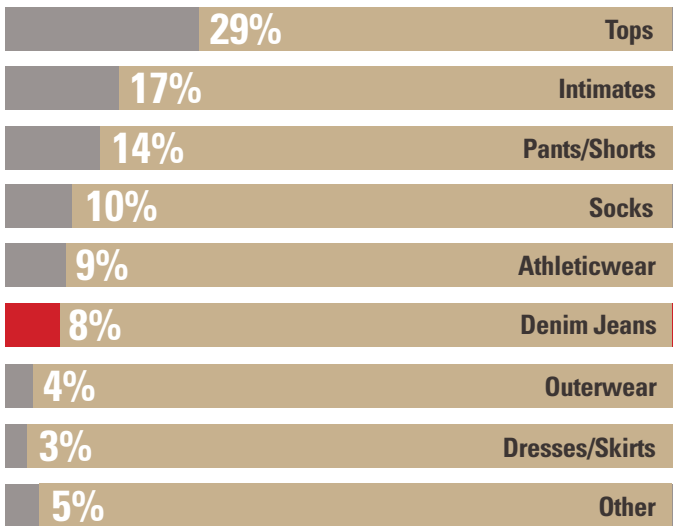
TOP 5 PLACES IN COLOMBIA (AMONG THOSE WHO SHOP ONLINE FOR CLOTHES)



DENIM JEAN OWNERSHIP AND PREFERENCES

Colombian consumers report that their wardrobe consists of 8% denim jeans and they own the most jeans globally. Many Colombians wear this beloved wardrobe item and cotton staple several days a week and to work on a daily basis.

COLOMBIAN WARDROBE ALLOCATION (UNIT BASIS)



AVERAGE NUMBER OF DAYS PER WEEK CONSUMERS WEAR DENIM JEANS/SHORTS

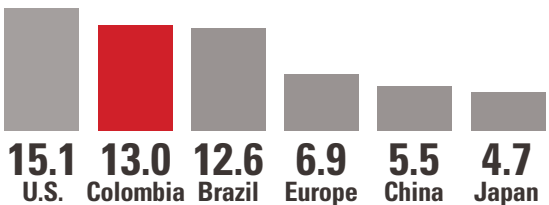
On average, Colombians wear denim jeans/shorts 4 days a week.



DENIM OWNERSHIP & AFFINITY BY COUNTRY

Colombian consumers own an average of 7.9 denim jeans, the highest jean ownership globally. In terms of total denim ownership (i.e., jeans, shirts, dresses, etc.), Colombia ranks second only behind total denim ownership in the United States.

Average Number of Total Denim Items Owned



73%

Over 7 in 10 Colombian consumers say they love or enjoy wearing denim



COLOMBIAN DENIM WARDROBE ALLOCATION (UNIT BASIS)

Denim jeans and shorts represent nearly three-fourths (74%) of the denim items that Colombians say they own.



61%

Jeans

13%

Shorts

10%

Shirts

9%

Jackets

4%

Skirts

3%

Dresses

49%

Almost half of Colombian consumers (49%) wear jeans to work on a daily basis.

