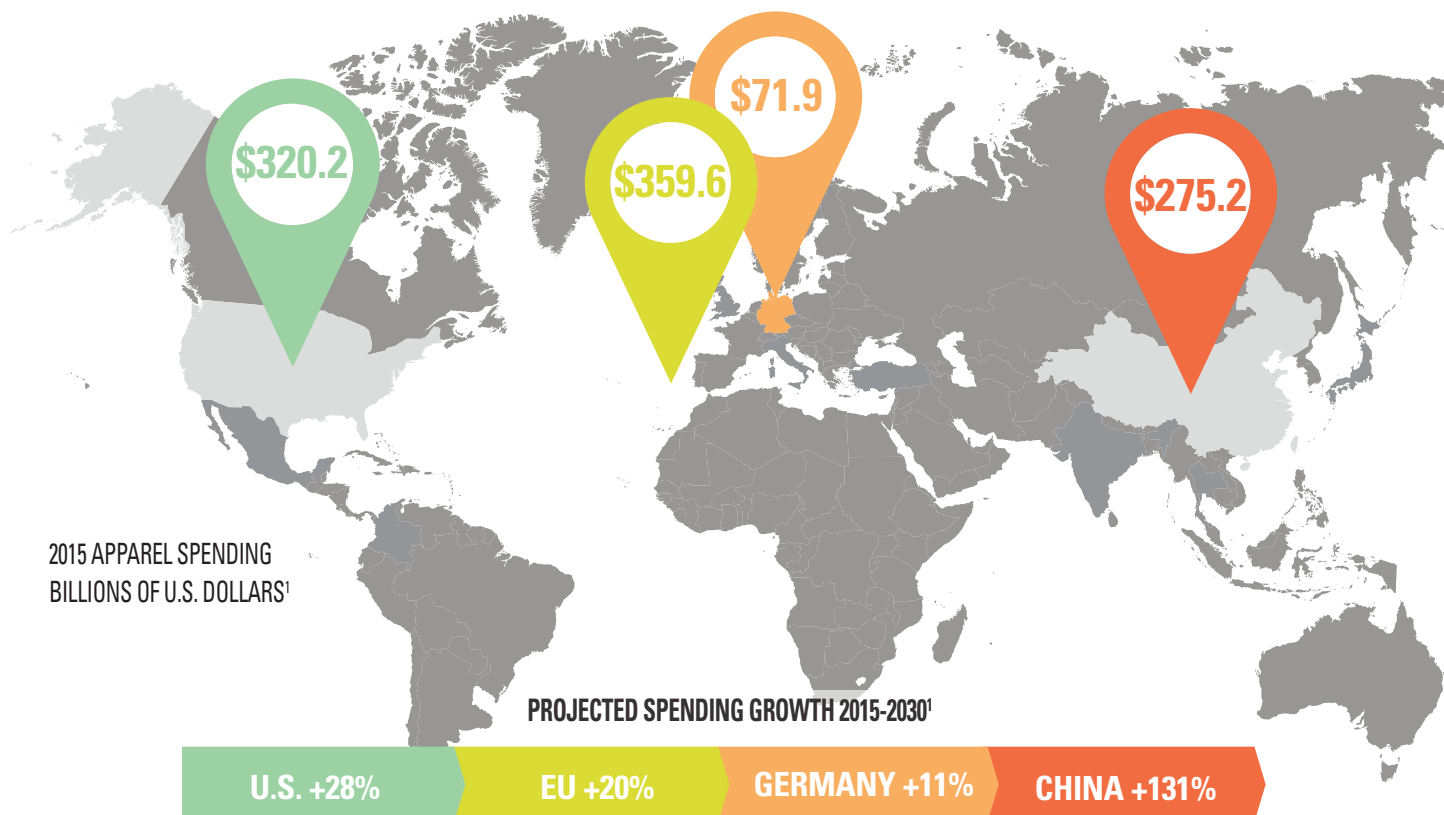


GLOBAL CONSUMER INSIGHTS



GLOBAL LIFESTYLE MONITOR: GERMANY

APPAREL SPENDING



KEY TRENDS



SPENDING

Apparel spending in Germany is projected to grow at a moderate pace over the next 15 years.



SHOPPING

German shoppers remain more impulsive and quality-conscious than their counterparts, although less so than 15 years ago.



OMNICHANNEL

Providing more detailed product information can help brands win online and store-based shoppers in Germany.



SUSTAINABILITY

Cotton offers German consumers the functional, emotional, and sustainable benefits they demand in their apparel purchases.

GLOBAL LIFESTYLE MONITOR: GERMANY

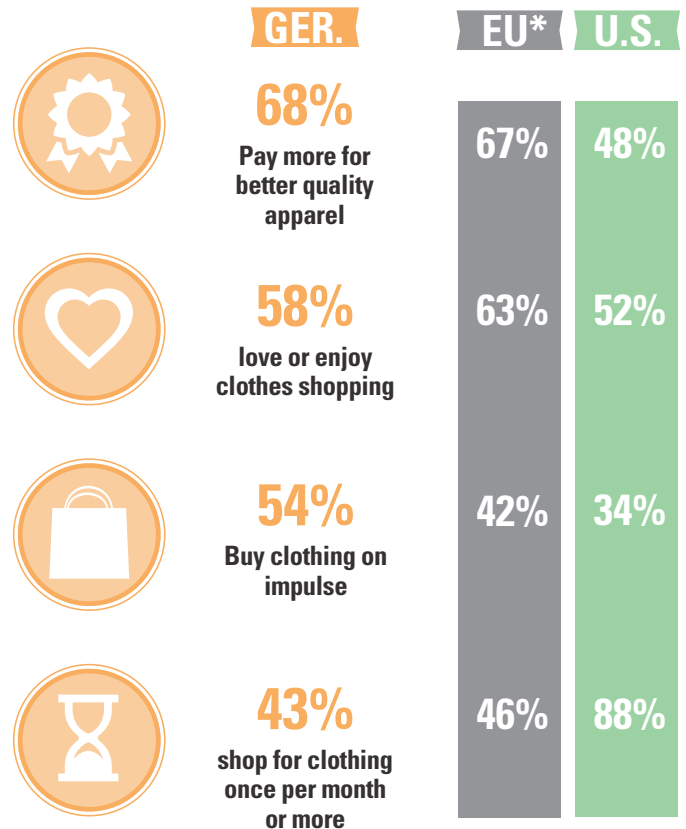
APPAREL SHOPPING ATTITUDES & HABITS

Over the past fifteen years, German consumers' shopping frequency and impulse purchases have declined, although they remain more quality-conscious and impulsive than their American counterparts. Brands must be adept at utilizing both in-store and online resources to explain their quality and value proposition to the increasingly omnichannel German shopper.

TOP SOURCES OF CLOTHING IDEAS



APPAREL SHOPPING HABITS



* INCLUDES FIGURES FOR U.K., GERMANY & ITALY

RETAIL CHANNELS SHOPPED MOST OFTEN

	GER.	EU*	U.S.
SPECIALTY STORES	23%	19%	10%
CHAIN STORES	22%	24%	23%
ONLINE	22%	15%	7%
DEPARTMENT STORES	8%	11%	15%
OFF-PRICE STORES	8%	8%	9%
OTHER	17%	23%	36%

2 in 3 consumers say retailer/brand websites are their top online source of clothing inspiration.

TOP 5 CLOTHING PURCHASE DRIVERS

97%
comfort



96%
quality



95%
fit



91%
color



90%
price



OMNICHANNEL SHOPPING

Although more than 7 in 10 German consumers buy most of their clothing in-store, the internet is being utilized as a research tool for in-store and online shopping. As in other global markets, tactile concerns remain a major barrier in preventing German consumers from buying clothing online. However, more detailed product information can ease the online and/or in-store shopping journey.

TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



39%

inability to try on clothes



34%

inability to touch clothes



32%

information privacy



29%

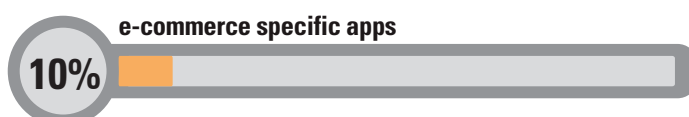
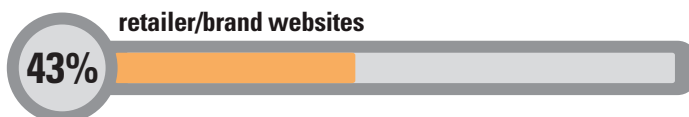
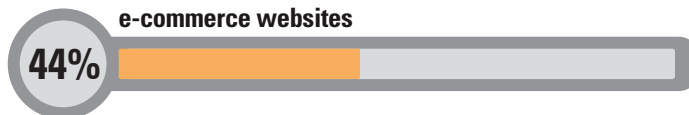
shipping costs



28%

clothing quality

WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

64%

detailed size information

56%

up-close views

53%

views in multiple colors

47%

material/fabric information

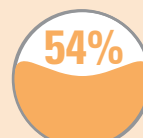
45%

detailed fit information



Online apparel & footwear sales are projected to grow 32% from \$11.1bn in 2015 to \$14.6bn by 2020¹.

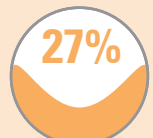
USING THE INTERNET TO SHOP FOR CLOTHES



research clothing



compare prices



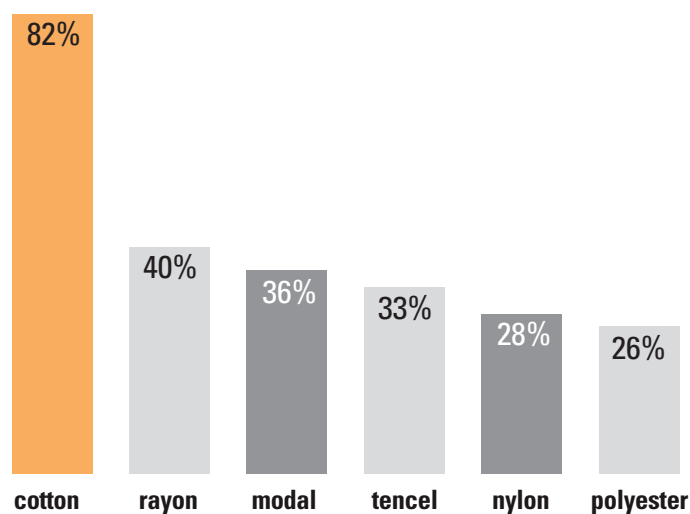
shop deals


GLOBAL LIFESTYLE MONITOR: GERMANY

SEEKING SUSTAINABLE APPAREL

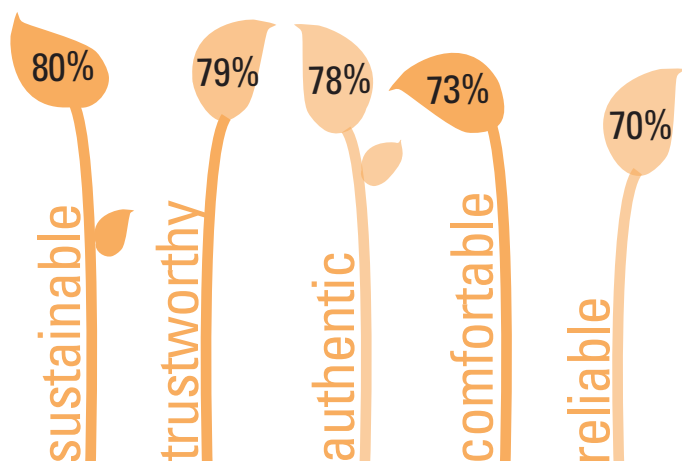
While less than a third of German shoppers actively seek out sustainable apparel, two-thirds would blame the industry if they purchased clothing produced in a non-sustainable manner. Cotton remains German consumers' fiber and natural fiber of choice because it offers the functional, emotional, and sustainable benefits they are seeking in their apparel purchases.

% SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



 **87% of consumers prefer cotton-rich clothing.**

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



TOP SUSTAINABILITY/SOCIAL CONCERNS



**ANIMAL/PLANT
EXTINCTION 74%**



**GLOBAL
WARMING 73%**



**AIR
QUALITY 72%**



**CHILD
LABOR 72%**

SUSTAINABILITY...

when it's lacking, I blame the industry. **66%**

is important in my apparel purchase. **52%**

32% is something I seek out in my apparel.

TOP CONCERNS REGARDING COTTON PRODUCTION

1. Amount of chemicals & pesticides used
2. Amount of water 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. Cotton Incorporated's *Lifestyle Monitor™* Survey, an ongoing consumer survey that interviews 6,000 U.S. consumers annually. External Source: Euromonitor International¹