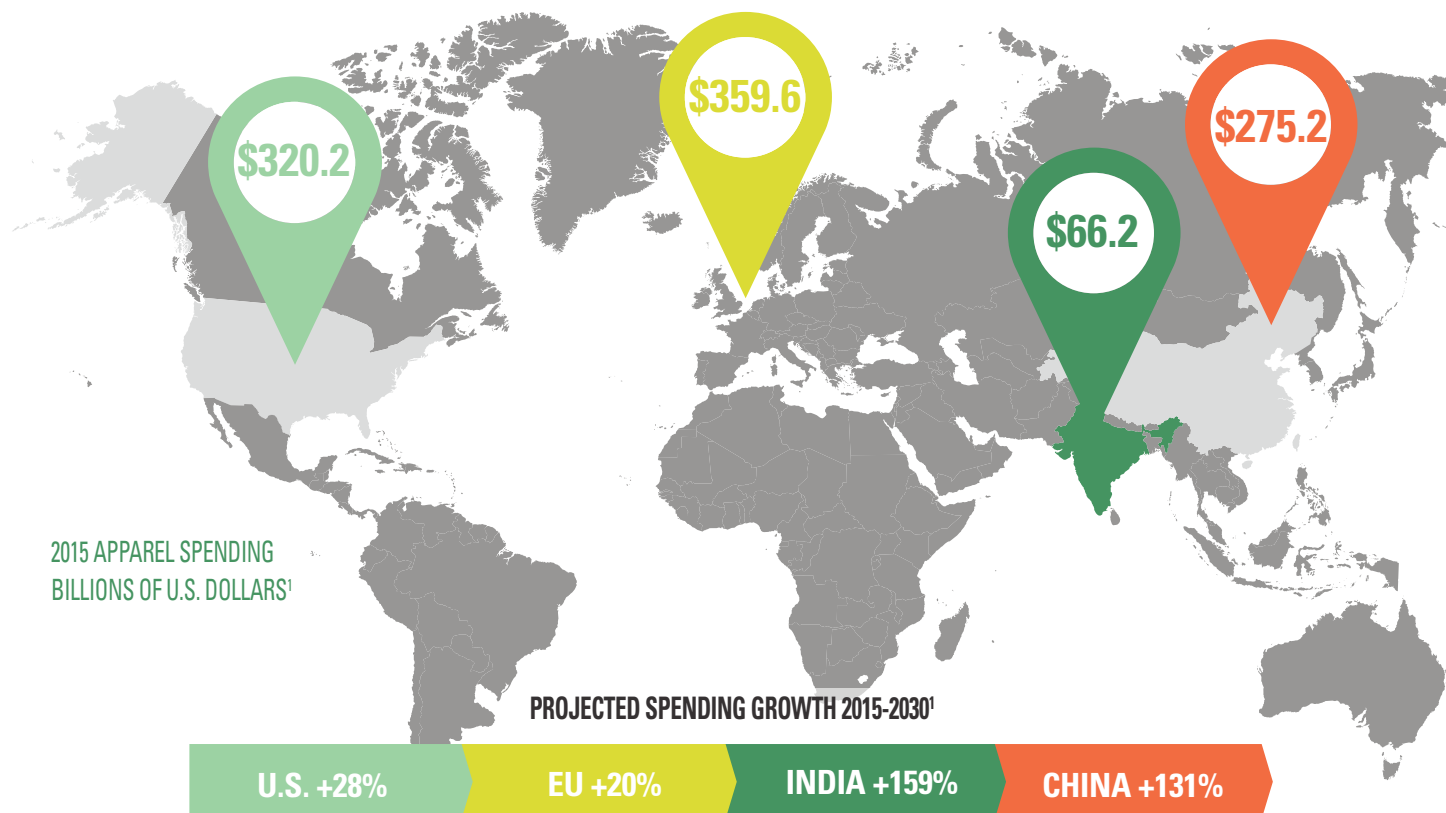


# GLOBAL CONSUMER INSIGHTS

## GLOBAL LIFESTYLE MONITOR: INDIA



### APPAREL SPENDING



### KEY TRENDS



#### SPENDING

India is projected to become the world's third largest apparel market with spending on clothes projected to double over the next 15 years.



#### SHOPPING

Success in the Indian apparel market will require customized marketing, advertising, and product assortments to meet consumers' diverse needs.



#### OMNICHANNEL

Brands and retailers can alleviate shoppers' tactile concerns by developing websites and apps that provide detailed product information.



#### SUSTAINABILITY

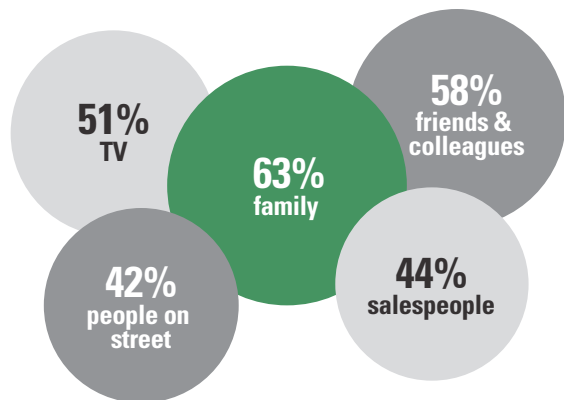
Consumers in India find cotton clothing as best positioned to meet their needs for comfort, reliability, and sustainability.

## GLOBAL LIFESTYLE MONITOR: INDIA

## APPAREL SHOPPING ATTITUDES &amp; HABITS

By 2030, India is expected to become the world's third largest apparel market with spending on clothes projected to more than double<sup>1</sup>. Brands such as H&M, Gap, and Juicy Couture have recently entered the market to take advantage of strong apparel spending growth. However, the market is not homogenous. Economic development and cultural differences make apparel habits vastly different across the country. Success in the Indian market will require a keen understanding of these differences and customized marketing, advertising, and product assortments to meet consumers' diverse needs.

## TOP SOURCES OF CLOTHING IDEAS



## RETAIL CHANNELS SHOPPED MOST OFTEN

	INDIA	EU*	U.S.
INDEPENDENT STORES	30%	7%	1%
HYPERMARKETS	25%	4%	24%
DEPARTMENT STORES	17%	11%	15%
SPECIALTY STORES	9%	16%	10%
CHAIN STORES	6%	24%	23%
OTHER	13%	38%	27%

## APPAREL SHOPPING HABITS



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

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

## TOP 5 CLOTHING PURCHASE DRIVERS

color



durability



fit



style



quality



## OMNICHANNEL SHOPPING

Although online shopping and internet penetration remain low in India, online apparel and footwear spending is projected to nearly triple in the coming years as shoppers increasingly turn to e-commerce and discount websites such as Myntra, Snapdeal, and Amazon. This is an opportunity for traditional apparel brands and retailers to capture rupees from the projected market growth by developing websites and apps that address consumers' tactile concerns.

### TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



**66%**

clothing  
availability



**66%**

inability to try on  
clothes



**66%**

inability to touch  
clothes



**66%**

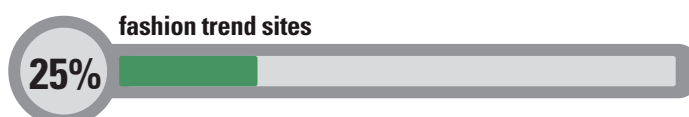
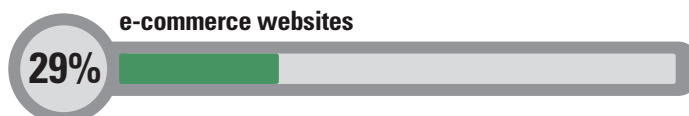
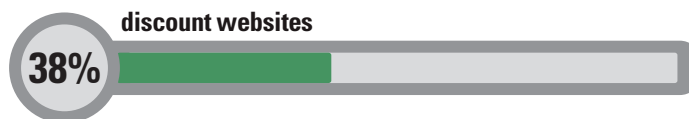
clothing quality



**65%**

return policies

### WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



### FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

**70%** detailed fit information

**69%** up-close views

**68%** fiber content information

**67%** sustainability information

**67%** views in multiple colors



Online apparel & footwear sales are projected to grow 264% from \$3.1bn in 2015 to \$11.1bn by 2020<sup>1</sup>.

56% SHOP FOR CLOTHING ONLINE & USE THE INTERNET TO...



compare prices



research clothing



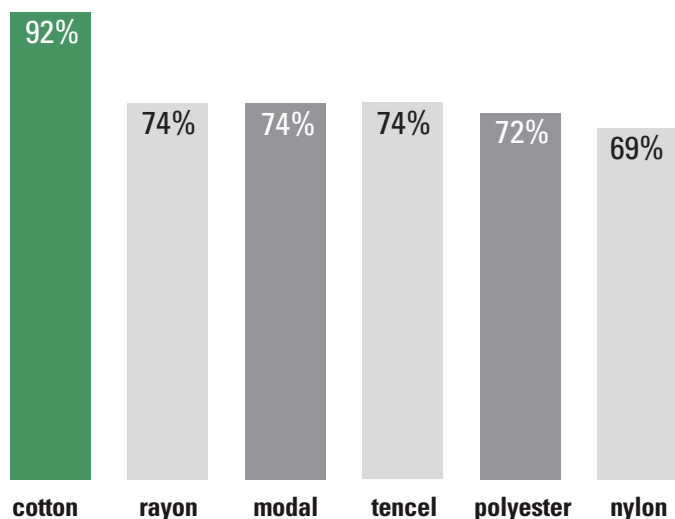
read reviews

## GLOBAL LIFESTYLE MONITOR: INDIA

## SEEKING SUSTAINABLE APPAREL

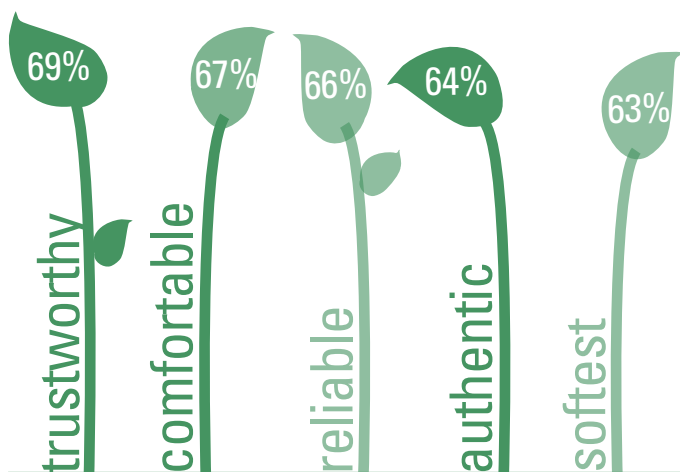
Environmental and social concerns, such as water scarcity and urbanization, are issues Indian consumers deal with regularly, making them more aware of related issues and more likely to seek out sustainable clothing. Consumers in India find cotton clothing as best positioned to meet their needs for comfort, reliability, and sustainability. In fact, Indian consumers are more likely to view cotton as safe for the environment compared to manmade fibers.

## % SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



85% of consumers prefer cotton-rich clothing.

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



## TOP SUSTAINABILITY/SOCIAL CONCERNS



**WATER  
SCARCITY 87%**



**FOOD  
SCARCITY 87%**



**URBAN-  
IZATION 87%**



**DEPLETION  
OF NATURAL  
RESOURCES 86%**

## SUSTAINABILITY...

is important in my apparel purchase.

85%

is something I seek out in my apparel.

78%

when it's lacking,  
I blame the industry.

62%

## 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 DO<sup>SM</sup> 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<sup>1</sup>