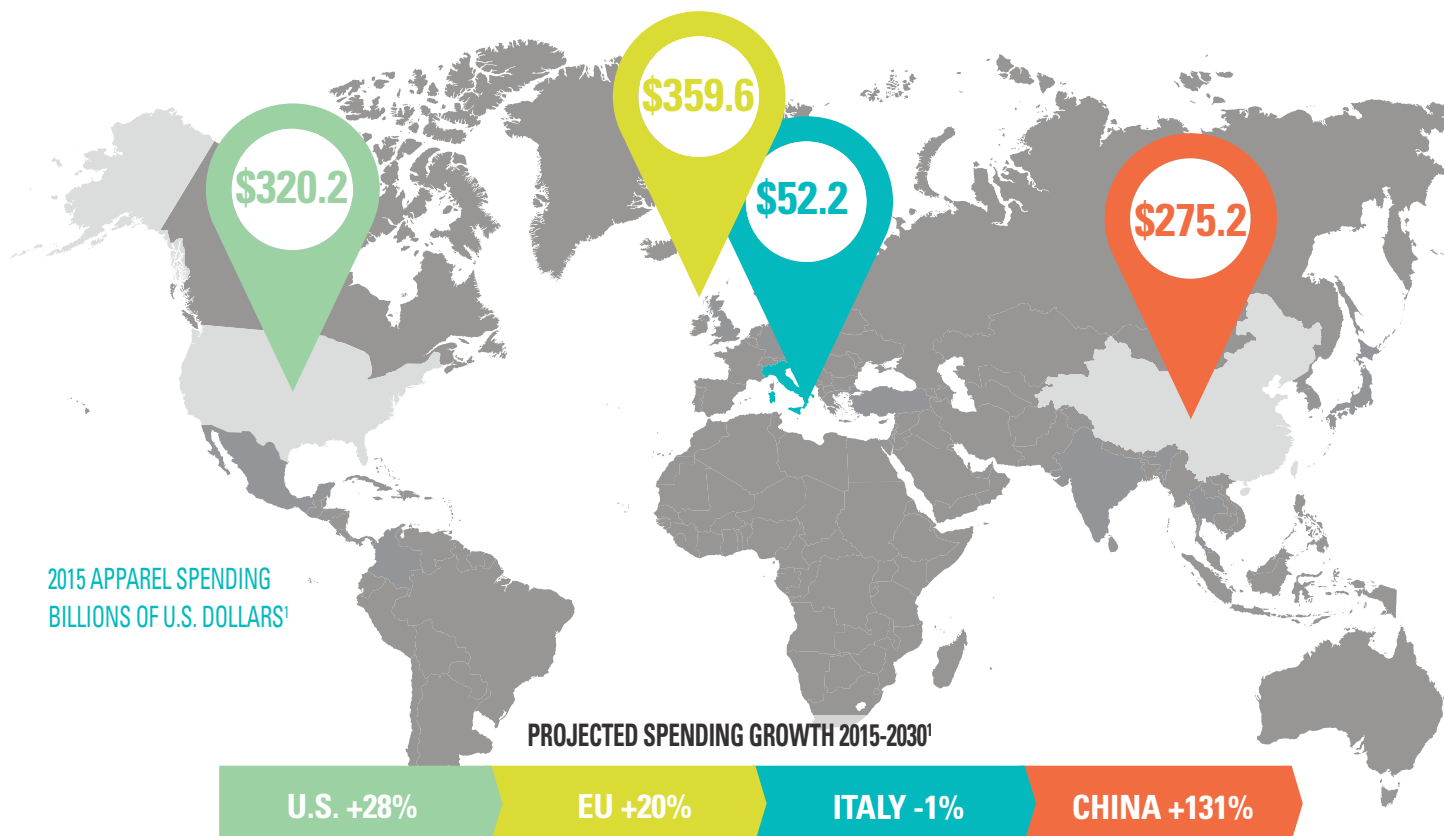


# GLOBAL CONSUMER INSIGHTS

## GLOBAL LIFESTYLE MONITOR: ITALY



### APPAREL SPENDING



### KEY TRENDS



#### SPENDING

A weak apparel market in Italy will call for brands and retailers to rethink current strategies to encourage pragmatic Italian shoppers to buy.



#### SHOPPING

Brands have a greater opportunity to use their physical stores to educate and inspire Italian shoppers than they do in other developed markets.



#### OMNICHANNEL

Realizing the strong potential in online spending will require brands and retailers to offer a seamless integration across digital platforms.



#### SUSTAINABILITY

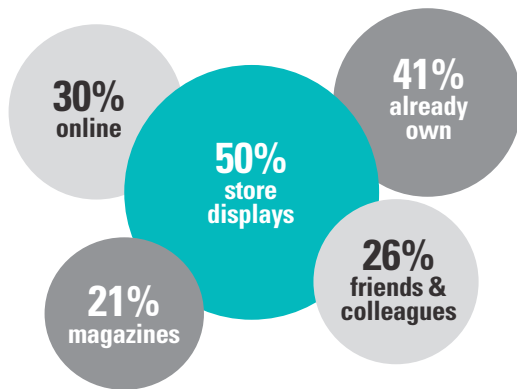
Sustainability is a core driver in Italians' purchase decisions and cotton is overwhelmingly viewed as their sustainable fiber of choice.

## GLOBAL LIFESTYLE MONITOR: ITALY

## APPAREL SHOPPING ATTITUDES &amp; HABITS

Although Italians' affinity for clothes shopping is among the highest globally, they are more pragmatic shoppers. As store displays are the top source of clothing inspiration among Italian consumers, brands and retailers have more of an opportunity in Italy compared to other developed markets to use their stores a forum to educate consumers about their brand, products, and inspire their wardrobe choices.

## TOP SOURCES OF CLOTHING IDEAS



## RETAIL CHANNELS SHOPPED MOST OFTEN

	ITALY	EU*	U.S.
CHAIN STORES	26%	24%	23%
SPECIALTY STORES	25%	16%	10%
INDEPENDENT STORES	16%	7%	1%
DEPARTMENT STORES	10%	11%	15%
ONLINE	9%	15%	7%
OTHER	14%	27%	44%

## APPAREL SHOPPING HABITS



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

@ Nearly 7 in 10 consumers say retailer/brand websites are their top online source of clothing inspiration.

## TOP 5 CLOTHING PURCHASE DRIVERS



## OMNICHANNEL SHOPPING

One major bright spot in the Italian apparel market is the projected growth in online apparel and footwear spending (+75% over the next 15 years). In order to realize these potential gains, brands will have to find ways to tell their story across multiple online platforms, from their own websites to apps to fashion trend sites, because Italian shoppers are less likely than their European counterparts to start their online journey at just one of these platforms. Given that more than 9 in 10 Italian consumers shop for most of their apparel in physical stores, online retailers must find ways to alleviate consumers' tactile concerns with more product information to spur sales.

### TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



**60%**

inability to try on clothes



**55%**

inability to touch clothes



**48%**

shipping costs



**46%**

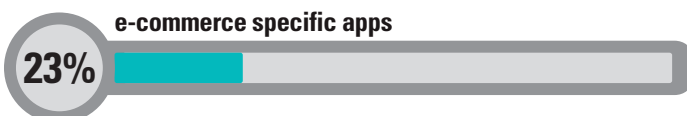
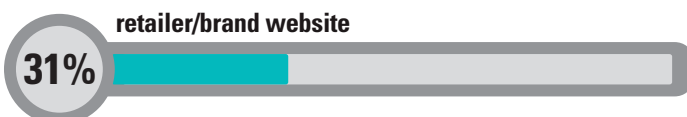
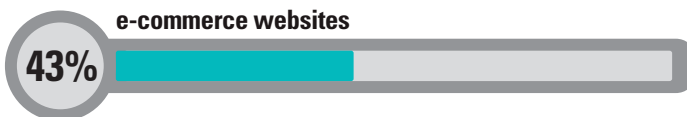
return policies



**44%**

clothing quality

### WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



### FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

**66%** detailed size information

**62%** detailed fit information

**61%** up-close views

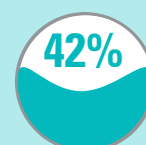
**59%** customer reviews

**57%** material/fabric information

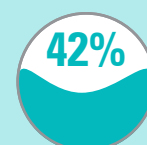


Online apparel & footwear sales are projected to grow 75% from \$1.8bn in 2015 to \$3.1bn by 2020<sup>1</sup>.

### USING THE INTERNET TO SHOP FOR CLOTHES



compare prices



shop deals



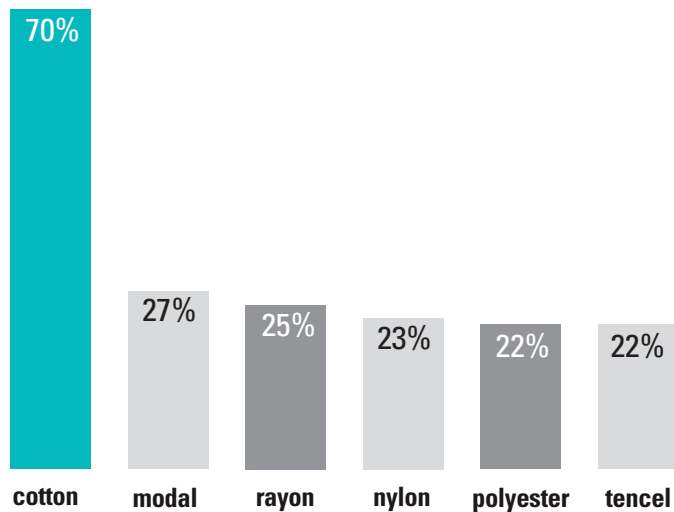
research clothing

## GLOBAL LIFESTYLE MONITOR: ITALY

## SEEKING SUSTAINABLE APPAREL

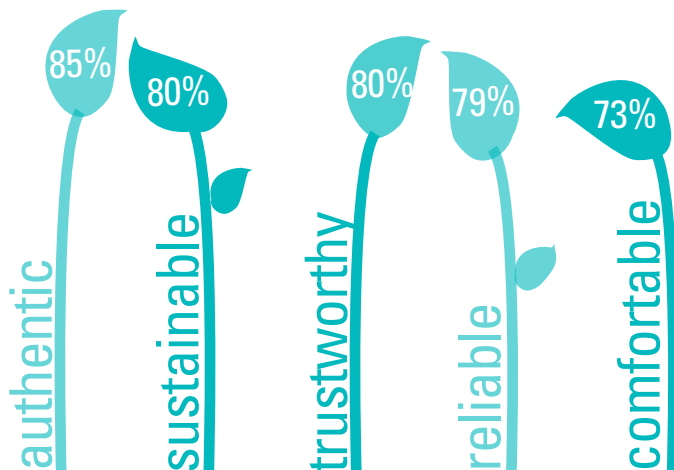
Italian consumers are more likely than other Europeans or Americans to translate environmental concerns into their shopping decisions. The majority of Italians say sustainability is important to their apparel purchases (66%) and they seek out sustainable apparel at retail (58%). Cotton is almost three times as likely as manmade fibers to be viewed as safe for the environment, as well as being viewed as the most comfortable, trustworthy, and authentic.

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



78% of consumers prefer cotton-rich clothing.

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



## TOP SUSTAINABILITY/SOCIAL CONCERNS



AIR  
QUALITY 91%



WATER  
QUALITY 89%



FOOD  
SAFETY 88%



GLOBAL  
WARMING 88%

## SUSTAINABILITY...

is important in my apparel purchase.

66%

when it's lacking, I blame the industry.

62%

is something I seek out in my apparel.

58%

## 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](http://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<sup>TM</sup>* Survey, an ongoing consumer survey that interviews 6,000 U.S. consumers annually. External Source: Euromonitor International<sup>1</sup>