GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: CHINA

APPAREL SPENDING

China continues its rapid growth in the apparel market. Consumers spent $277.2 billion on clothing in 2017, a growth of 166% since 2008. This number is expected to grow a further 193% by 2030, providing ample opportunity for brands and retailers to reach these tech-savvy consumers.

CHINA $277.2[1] +193% growth

US $338.9 +56% growth

EU $374.5 +52% growth

INDIA $87.9 +148% growth

KEY TRENDS

How They Shop: Optimize online and mobile platforms to meet consumer preferences for a digital shopping journey.

What They Shop: Focus on high quality offerings and performance-maximizing features for discerning Chinese shoppers.

Spotlight on Higher Income Consumers: Target a growing middle & upper class with quality clothing made of natural fibers and detailed product information as they shop for themselves and family members.

FINANCIAL OUTLOOK

OPTIMISTIC

China	Global
77%	56%

PESSIMISTIC

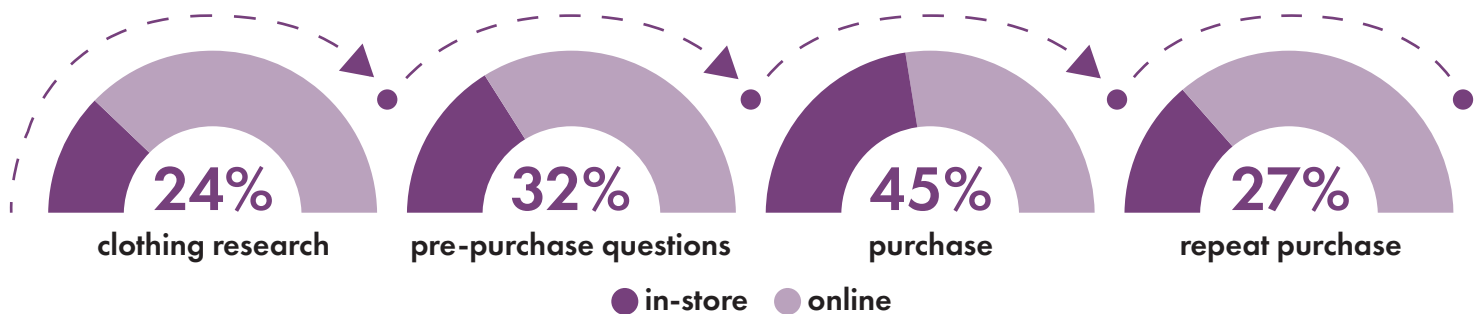| China	Global
4%	11%

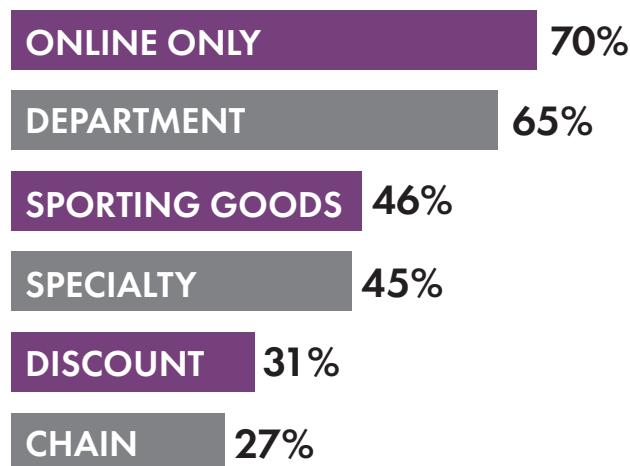*"Neither Optimistic/Pessimistic" not shown*

HOW THEY SHOP

Online and mobile shopping is tremendously popular in China. While just over half (52%) of the population regularly uses the internet (at least once per week)[1], 59% say they prefer to shop online. Traditional shopping remains important, as 57% of consumers enjoy the experience of physical stores and many gain inspiration from retail displays. Invest in digital platforms to deliver both online only and integrated in-store shopping experiences.

SHOPPING JOURNEY
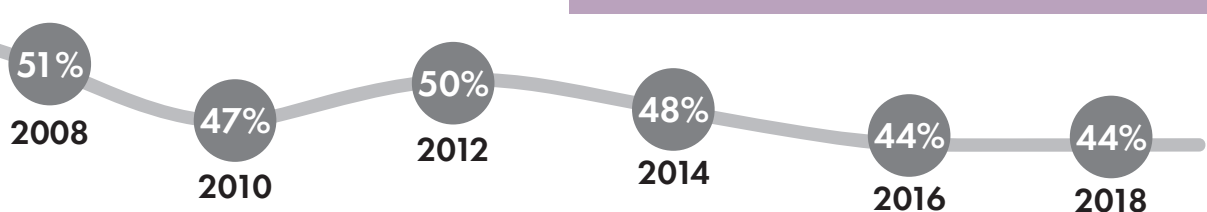*Consumers who prefer shopping in-store (vs. online)*

24% clothing research

32% pre-purchase questions

45% purchase

27% repeat purchase

● in-store ● online

RETAIL STORES SHOPPED FOR CLOTHING

ONLINE ONLY	70%
DEPARTMENT	65%
SPORTING GOODS	46%
SPECIALTY	45%
DISCOUNT	31%
CHAIN	27%

59% Shop online at least once per month.

APPAREL SHOPPING HABITS
Buying Clothes on Impulse

51% 2008
47% 2010
50% 2012
48% 2014
44% 2016
44% 2018

SOURCES FOR CLOTHING IDEAS

Other People **73%**

Brand & Retailer Digital Resources **58%**

Window Shopping **42%**

Traditional Media **37%**

Social Media **34%**

Store Publications **28%**

COTTON USA | cotton

GLOBAL LIFESTYLE MONITOR SURVEY • CHINA • COLOMBIA • GERMANY • INDIA • ITALY • MEXICO • JAPAN • THAILAND • TURKEY • UNITED KINGDOM
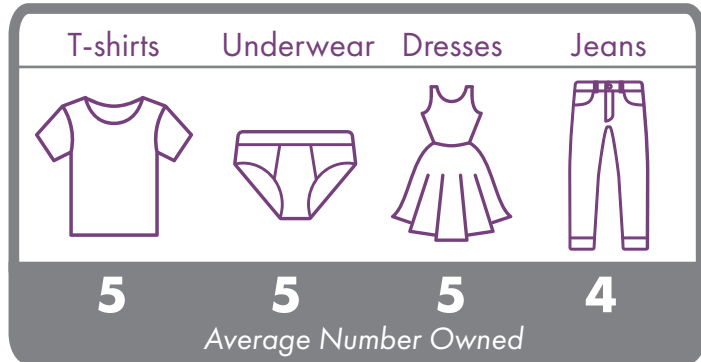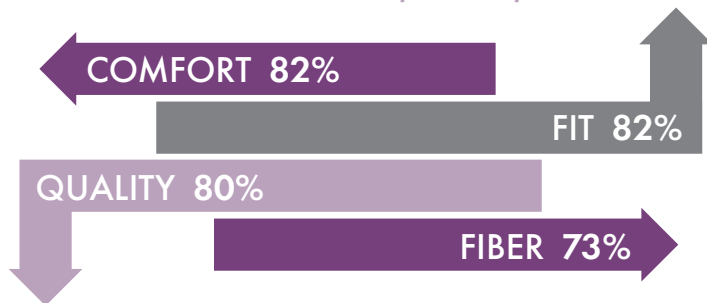
WHAT THEY SHOP

Chinese consumers are modest shoppers, owning 39% fewer garments than the average for consumers across the world. They focus on quality over quantity of clothing and will pay more for clothes that provide the comfort, fit, and fiber they seek. Consumers are interested in clothing that helps maximize their performance with features such as body temperature regulation and exercise strain monitoring.
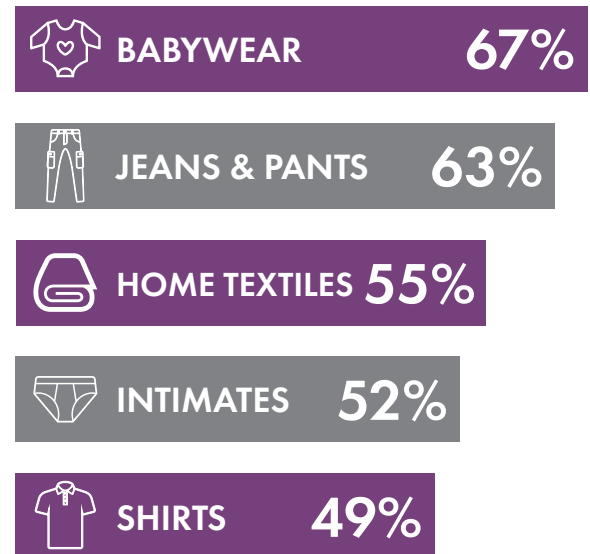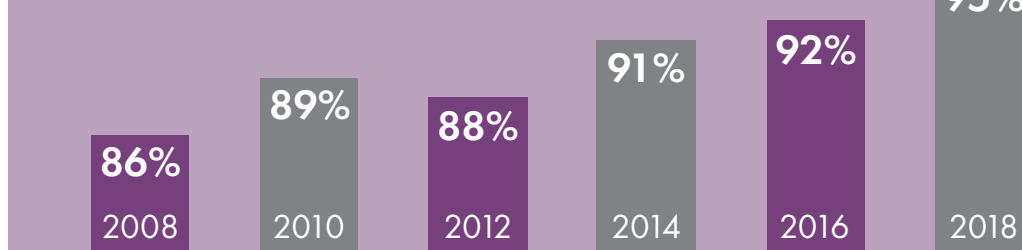
TOP ITEMS OWNED

T-shirts	Underwear	Dresses	Jeans
5	5	5	4

Average Number Owned

PRIMARY PURCHASE DRIVERS
Consumers would like to know prior to purchase

COMFORT 82%

FIT 82%

QUALITY 80%

FIBER 73%

COTTON AS PREFERRED FIBER

BABYWEAR	67%
JEANS & PANTS	63%
HOME TEXTILES	55%
INTIMATES	52%
SHIRTS	49%

PAY MORE FOR BETTER QUALITY

86%	89%	88%	91%	92%	95%
2008	2010	2012	2014	2016	2018

76% prefer cotton or cotton blends for their most-worn clothing

PERFORMANCE APPAREL
Likely to Purchase

63% Regulate Body Temperature

58% Relieve Stress

55% Monitor Workout Performance

55% Monitor Body Strain

53% Monitor Heart Rate

SPOTLIGHT

OPTIMISTIC FINANCIAL OUTLOOK

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82% Higher Income *(¥10k per month)*

74% All Others

China's affluent classes are projected to grow from 9.7% of the population in 2015 up to one-third (34.2%) by 2030[2]. These higher-income consumers are more demanding shoppers than their counterparts and are willing to pay more for quality clothing made from natural fibers. Reach these consumers with detailed product information and quality offerings made of natural fibers as they shop for both themselves and others.

RETAIL STORES SHOPPED FOR CLOTHING
Higher Income Consumers Prefer

DEPARTMENT 75%

ONLINE ONLY 74%

SPECIALTY 59%

SPORTING GOODS 51%

BETTER QUALITY CLOTHES MADE FROM NATURAL FIBERS
Agree

68% Higher Income

58% All Others

SHOPS FOR OTHERS

80% Higher Income

67% All Others

ENJOY CLOTHES SHOPPING

HIGHER INCOME **87%**

ALL OTHERS **73%**

PURCHASE DRIVERS
Higher Income Consumers Want to Know Prior to Purchase

Comfort 87%

Style 76%

Performance Features 69%

Brand Name 52%

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