

## INSIGHTS

## EUROPEAN VIEWS ON FIBER &amp; DENIM



Like most consumers around the world, those in Italy, the United Kingdom, and Germany prefer cotton apparel, according to the Global Lifestyle Monitor (which in 2008 surveyed consumers in 10 countries). In particular, European consumers enjoy wearing denim—a preference that could be reinforced by trends towards casual dress in the workplace. Despite these commonalities, a closer look at Global Lifestyle Monitor data reveals that European attitudes are not monolithic. Italian, German, and UK consumers show clear differences in their attitudes towards cotton apparel and natural fibers, which could influence product development and marketing strategies in these countries.

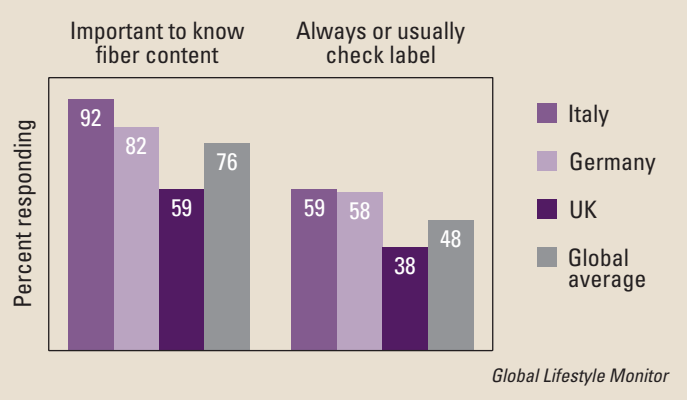
### ITALY: COTTON FOR QUALITY & STYLE

Enthusiasm for cotton runs especially high in Italy, where 86% of consumers prefer cotton for the clothing they wear the most (the second-highest percentage globally). When asked to name the fiber best suited for current fashions, 78% of Italian shoppers chose cotton—well above the global average. Italy has the highest percentages of consumers who characterize cotton as “quality” (98%), “comfortable” (97%), “youthful” (88%), “stylish” (86%), and “sporty” (84%).

Italian shoppers are probably the world’s most fiber-conscious—92% consider it important to know fiber content before buying clothing, and 79% would rather know fiber content than brand (the highest percentages globally). Italians are also more likely than the average global consumer to always or usually check the fiber-content label before purchasing (59% vs. 48%). To identify fiber content, Italians

rely on both touch (46%) and labeling (38%). Their strong preference for cotton may explain their favorable attitude towards natural fibers in general—72% consider natural fiber content important (the highest percentage globally), and 66% agree that better-quality clothes are made from natural fibers (the second-highest percentage globally). Although consumers worldwide consider a garment’s overall quality the most important information to know before purchasing, Italians lead the world in this concern (cited by 98%). They also care more than the average global consumer about a garment’s finish (e.g., seams, hem) (93% vs. 86%), another sign of their focus on quality.

### FIBER CONSCIOUSNESS VARIES

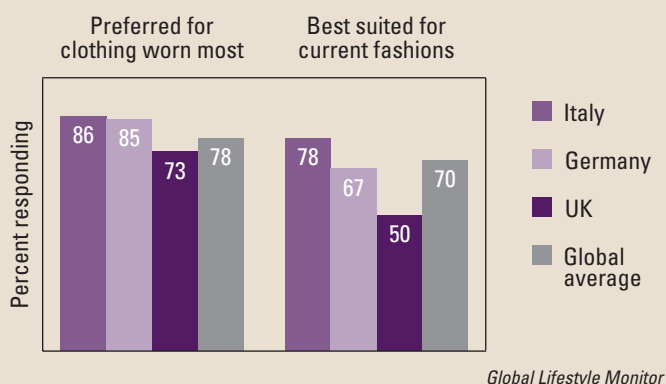


Among Italian consumers, 62% love or enjoy wearing denim, up from 44% in 1999. Although Italians rank seventh globally in their love of denim, they rank third in how often they wear denim jeans or shorts (an average of 4.3 days a week, compared with the global average of 3.5). The finding that they wear denim more often than most consumers globally could be related to the prevalence of casual attire in Italian workplaces. About two thirds of Italian consumers are allowed to wear casual clothes to work at least one day a week, and the average number of casual days per week (5.4) is the second highest among the countries surveyed. Nearly half of Italian consumers (48%) say they wear casual clothes to work, slightly above the global average of 46%.

### GERMANY: FIBER-CONSCIOUS DENIM WEARERS

Like Italians, German consumers clearly prefer cotton for the clothing they wear the most (85%). They are more likely than

### EUROPEANS PREFER COTTON APPAREL



## EUROPEAN VIEWS ON FIBER & DENIM

the average global consumer to describe cotton as “comfortable” (94%), “traditional” (90%), and “stylish” (83%). Also like Italians, German shoppers are fiber-conscious. They care more than the average global consumer about knowing the fiber content before purchasing (82% vs. 76%) and less than any other consumers about knowing the brand (27%). Compared with the average global consumer, Germans rely more on the label to identify fiber content (52%), and they are more likely to check the label before purchasing (58%).

Germans are more enthusiastic about denim than consumers in any other country surveyed—88% enjoy or love wearing denim, compared with 78% of U.S. consumers and the global average of 65%. Among global consumers, Germans own the most denim jeans (8.6) and denim jackets (2.3) and rank third in total number of denim garments owned (18). They also wear denim the most often (5.2 days a week, vs. 3.5 globally and 4.2 in the U.S.). Casual dress is widely allowed in the workplace, and although Germans feel more strongly than any other consumers that one must wear a suit or jacket to look professional (with 66% agreeing), half of German consumers say they wear casual clothes, including jeans, to work.

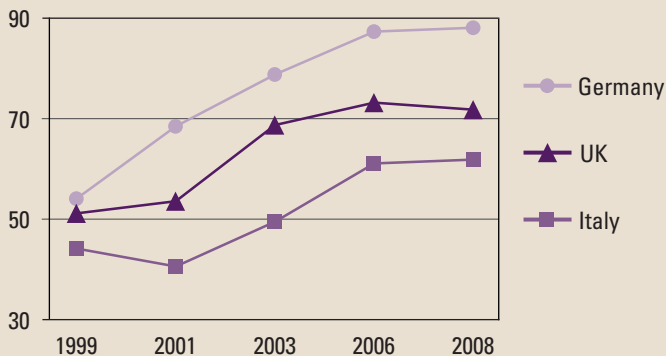
more on labeling (66%) and less on touch (16%) than do any other global consumers. However, only 38% always or usually check the label, well below the global average (48%).

UK consumers are among the most denim-loving in the world, ranking behind only German and U.S. consumers. While UK consumers are not as focused on fiber content as Italians and Germans, their love of denim shows that they appreciate cotton’s qualities. UK consumers are more likely than Germans to say that they wear denim because of the feel of the fabric (59% vs. 49%), and 62% know that denim is made of cotton, ahead of Germans (61%), Italians (56%), and the global average (42%).

UK consumers own an average of 17 denim garments and rank third in jeans ownership (7.6 pairs). Worldwide, UK women are the most likely to own denim dresses and rank second in denim skirt ownership. But despite their love of denim, UK consumers wear denim fewer days per week on average (3.8) than do consumers in Germany, Italy, or the U.S.—possibly because casual dress at work is less acceptable in the UK than in most countries. Although the percentage of UK consumers allowed at least one casual day per week has risen from 25% in 1997 to 58% in 2008, the average number of casual days per week is 3.6, still lower than the global average or in Italy or Germany. Globally, the UK has the lowest percentage of consumers who wear casual clothes to work (26%) and the second-highest percentage who wear formal business suits (20%).

### EUROPEANS’ GROWING LOVE OF DENIM

Enjoy or love wearing denim (% responding)



Global Lifestyle Monitor

### UK: LESS FIBER-AWARE, BUT HIGH ON DENIM

Although consumers in the United Kingdom are not as fiber-conscious as their Italian or German counterparts, the percentage who prefer cotton for the clothing they wear the most (73%) has grown (up from 66% in 2003). However, when asked about their fiber preferences, UK consumers are much more likely than other global consumers to say they “don’t know.” Compared with the global average, twice as many UK consumers are unsure which fiber they prefer to wear (12% vs. 6%) or which fiber is best for today’s fashions (34% vs. 14%). To identify fabric content, UK consumers rely

### LESSONS LEARNED ABOUT EUROPE & FIBER

Although European consumers share a preference for cotton apparel, they express it in different ways. Italians are highly aware of fiber content, and they love cotton because they associate it with quality and style. Nearly as fiber-conscious as Italians, Germans are discerning shoppers, and they see cotton, especially denim, as a comfortable yet stylish choice for work or play. UK consumers share a love of denim but are less fiber-conscious than most shoppers globally. Their uncertain attitudes towards fiber may signal a marketing opportunity to raise their awareness of fiber content and of cotton’s fashion possibilities beyond denim.

#### About the Survey

The Global Lifestyle Monitor is a biennial consumer research study conducted by Cotton Council International, Cotton Incorporated, and Synovate. In the 2008 survey, 5,000 consumers (approximately 500 in each of 10 countries) were surveyed via telephone and face-to-face interviews. Consumers were male and female, aged 15 to 54, and representative of each country’s demographic and geographic profiles. U.S. data are from Cotton Incorporated’s Lifestyle Monitor™, which in the first quarter of 2008 surveyed 1,500 consumers aged 13 to 70 and which was conducted via the Internet by Bellomy Research.