



A Global Perspective on Apparel Shoppers

In the October 1999 issue of the *Textile Consumer*, the article "Will Apparel Consumers Respond to Global Marketing Strategies?" used research from Cotton Incorporated's and Cotton Council International's Global Lifestyle Monitor to examine whether brands could be marketed globally or whether marketing strategies should be implemented locally. The article concluded that "cultural preferences appear to be a better indicator than age or technological influences of why consumers shop, what outlets they prefer, and where they get their clothing ideas." Cultural preferences continue to be important in understanding consumer behavior, as evidenced by results of the 2001 Global Lifestyle Monitor survey. This article highlights the following findings from that research:

- A shift in shopping patterns favors small independent retailers.
- Casual wear is popular across markets.
- Popularity of denim remains high, although ownership is on the decline in several countries. Overall, consumers are satisfied with current denim styles.
- Fiber content remains a primary concern for consumers globally, but interest in content has changed significantly in some countries.
- Consumers from India were included for the first time, and the findings indicate that their attitudes and behavior differ greatly from those of other consumers.

Consumers Like To Shop for Apparel

Shopping for clothes remains a favorite pastime of most consumers. Globally, 64% of consumers say they enjoy or love shopping for apparel. On average, consumers shop for clothes 14 times a year, and they spent an average of \$902 on clothes for themselves in 2001, compared with \$934 in 1999.

Consumers in India are by far the most likely to either love or enjoy shopping, possibly because their opportunity to reach shopping destinations is limited by geography. On average, Indians shop for clothes 6 times per year, compared with 15 trips by consumers in other countries.

The 1999 survey indicated that Koreans and Hong Kongers were least likely to enjoy apparel shopping; this finding remains consistent in 2001, and these respondents showed some of the largest declines in shopping enjoyment. Koreans' expenditures on apparel remain well below (-15.6%) the index of \$934 set in the 1999 Global Monitor as the average annual apparel expenditure. However, Hong Kongers' clothes spending remains slightly above the index.

From 1999 to 2001, Italians doubled apparel shopping trips and spent more on clothes, with expenditures 30% above the index. In response to a rebounding economy, Japanese consumers also made more trips to stores and exceeded the expenditure index by 47.8%. However, consumers in some countries spent much less on apparel because of

About the Survey

Cotton Incorporated and Cotton Council International conducted the second Global Lifestyle Monitor in May 2001 in 10 countries, including countries in East Asia, Latin America, and Western Europe, and, for the first time, India. In each country, 500 interviews were conducted among consumers 15 to 54 years of age. Respondents were representative of demographic and geographic profiles. The first Global Monitor, in 1999, was conducted by Roper Starch Worldwide, and the 2001 survey was conducted by BAI Global. Analysis from Cotton Incorporated's Lifestyle Monitor™ also is used in this article to describe the attitudes and behaviors of U.S. consumers. The Lifestyle Monitor, conducted by Bellomy Research, originated in 1994 and is a telephone interview of 4,000 consumers per year between the ages of 16 and 70.

Apparel Shopping Attitudes and Behavior

Country	Like/Love Shopping (%)		Average Trips/Year	
	1999	2001	1999	2001
Brazil	80	78	7	10
Colombia	76	78	6	8
Germany	73	66	16	12
Italy	76	73	11	21
United Kingdom	61	60	18	19
Hong Kong	32	27	16	16
Japan	69	70	8	11
Korea	50	35	15	14
Taiwan	69	78	11	14
India	-	92	-	6
United States*	45	45	22	23
Total	63	64	13	14

Sources: Global Lifestyle Monitor and *Cotton Incorporated's Lifestyle Monitor™.

weakening economies; for example, spending by shoppers in Brazil and Colombia fell to 30.2% and 47.3% below the index, respectively. U.S. consumers continue to spend more on apparel (+3.4%) than the world average. Based on the 2001 survey, Indian consumers appear to spend much less on clothing than do consumers in the other countries surveyed. Excluding India from the 2001 total, globally, consumers indicated that they spent 4.9% more on apparel than in 1999.

Consumers shop at a variety of outlets before purchasing an apparel item. When asked where they shop for clothes, consumers most often name small independent retailers. In 2001, 55% of consumers (up from 50% in 1999) said they shopped at small niche retailers. Consumers were most likely to patronize independent retailers in India (82%), Italy

(78%), Hong Kong (74%), and Taiwan (64%). The primary appeal of the smaller retailers is the level of personal service they offer to consumers. Department (50%), specialty (48%), and chain stores (37%) were the next most popular outlets. Although relatively few consumers said they shopped at factory outlets, the percentage rose from 13% in 1999 to 18% in 2001. Driving the increase in factory outlet shopping was a 10-percentage-point gain among consumers in the Asian countries.

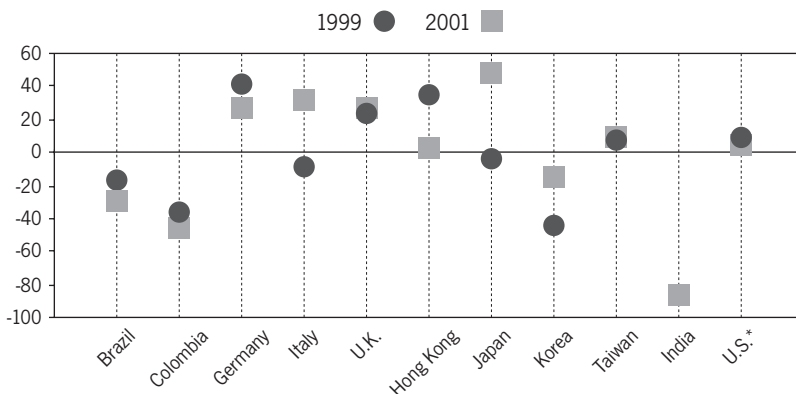
Although consumers tend to cross-shop different outlets for an apparel item before making a decision, the majority (84%) buy most of their clothes at four types of outlets: independent retailers (25%), department stores (21%), and chain and specialty stores (19% each). When consumers were asked where they bought most of their clothes, independent stores were named most by consumers in Italy (46%) and India (65%); department stores were the primary outlets in Japan (33%), Taiwan (33%), Korea (33%), Germany (22%), and Colombia (37%); and chain stores were most popular in Brazil (34%), the United Kingdom (27%), and the United States (25%). Specialty stores led in Hong Kong, with 37% of consumers buying most of their clothes at these outlets. These results were not significantly changed from 1999.

Casual Items Are Popular Across Markets

More than half of consumers said they had purchased jeans, T-shirts, or underwear for themselves in the past three months, which supports the finding that 80% of consumers tend to buy basic clothing rather than the latest styles. The exception is India, where fewer than 20% of consumers had purchased jeans, T-shirts, or underwear in the past three months; however, 46% had purchased cultural attire, such as saris, which in India may be considered basic clothing items.

shirts were popular in all countries, with approximately 6 out of 10 consumers buying at least one T-shirt in the past three months. T-shirt purchases differed among age categories, being highest for 15- to 19-year-olds (74%) and lowest for 45- to 54-year-olds (54%). In contrast, underwear purchases in the past three months did not differ by age; the per-

Percent Difference in Apparel Expenditures from 1999 Global Monitor Index Average of \$934



Sources: Global Lifestyle Monitor and *Cotton Incorporated's Lifestyle Monitor™.

Percent Purchasing Select Items in Past 3 Months

Country	Jeans	T-Shirts	Underwear
Brazil	51	59	39
Colombia	63	66	69
Germany	59	79	68
Italy	60	70	59
United Kingdom	58	76	75
Hong Kong	51	77	44
Japan	35	63	53
Korea	29	73	36
Taiwan	50	68	47
India	10	19	17
United States*	73	97	-

Sources: Global Lifestyle Monitor and *STS Market Research.

percentages were 49% of younger and 50% of older consumers.

Colombians and Italians were most likely to have purchased jeans in the past three months, as were consumers aged 15 to 19 (59%, compared with 33% of consumers aged 45 to 54). Least likely to have purchased jeans were Japanese and Koreans, which is not surprising, considering that they tend to own the fewest pairs of denim jeans.

Analysis of U.S. apparel purchase data from STS Market Research indicates that during the same period when the Global Lifestyle Monitor data were collected, enough denim jeans were purchased to dress 73% of Americans, and enough T-shirts were purchased to outfit 97%. Consumers aged 35 to 55 made the largest percentages of jeans and T-shirt purchases.

Average Number of Denim Apparel Items Owned

Country	All Denim Items		Denim Jeans	
	1999	2001	1999	2001
Brazil	16.5	15.4	6.1	6.3
Colombia	12.3	10.6	6.8	6.2
Germany	9.4	11.9	5.4	6.1
Italy	10.8	9.9	5.5	4.8
United Kingdom	9.9	13.2	4.9	5.1
Hong Kong	11.5	17.8	6.2	5.9
Japan	8.6	11.0	4.6	4.6
Korea	10.1	6.5	3.9	3.3
Taiwan	9.4	13.1	5.3	5.6
India	-	6.3	-	1.4
United States*	14.8	14.5	6.9	7.1
Total	11.3	11.8	5.6	5.1

Sources: Global Lifestyle Monitor and *Cotton Incorporated's Lifestyle Monitor™.

Denim Remains Popular

On average, consumers own 11 denim apparel items, including 5 pairs of denim jeans. Since 1999, ownership of denim apparel increased in half of the countries surveyed and declined in the other half. Other than jeans, denim apparel items owned include shirts, shorts, jackets, dresses, and skirts. After jeans, the most popular denim item is a jacket; most consumers own at least one. Denim shirts are most popular in Japan, Germany, Brazil, and the United States, where consumers own 2 on average, while ownership of denim shorts exceeds 3 per person in Brazil and the United States and 2 per person in Japan, Germany, and Colombia. Female respondents in Japan, Taiwan, the United Kingdom, India, Colombia, and Brazil indicated owning at least 2 denim dresses or skirts on average.

North Americans, Latin Americans, and Germans own the most pairs of denim jeans. According to the Lifestyle Monitor survey conducted among U.S. consumers, the average number of denim jeans owned has increased 7% since 1994 and has grown fastest among consumers 25 to 34 and 56 to 70.

Approximately half of consumers know that denim is made of cotton. Even in India, where ownership is lower than in any other country surveyed, 55% are aware of the origin of denim. But owning denim apparel does not mean that consumers are aware of its fiber content. In Latin America, where denim ownership is relatively high, over 40% of consumers do not know what denim is made of. The country where consumers have the least knowledge of denim's fiber content is Taiwan, where 70% reported not knowing, consistent with findings from 1999.

Excluding India, where 68% of consumers say denim is not for them, at least 50% of consumers globally either enjoy or love wearing denim. While over 70% are satisfied with the current styles in jeanswear, 74% agreed with the statement "I prefer jeanswear that is lighter in weight." However, only 41% agreed with the statement "I think current jeanswear offerings are too heavy," leading to the conclusion that, overall, consumers are satisfied with the current assortment of denim apparel.

Fiber Content Is Important to Consumers

Before purchasing a garment, consumers consider several factors, such as price, color, quality, and

fiber, and 75% of consumers in the survey cited fiber content as one of their top concerns. When given a choice between knowing the fiber content or brand name of a garment, 67% chose fiber content, and 65% said they would pay more for items made from natural fibers (up from 61% in 1999). The consumers most likely to pay more for natural fibers reside in Taiwan (87%), Italy (80%), India (78%), and Hong Kong (72%).

Globally, the percentage of consumers who usually or always check fiber content labels on garments

Percent with Apparel Fiber Content Concerns

Country	Always/Usually Check Content		Avoid Particular Fibers	
	1999	2001	1999	2001
Brazil	50	45	51	48
Colombia	47	34	59	41
Germany	62	67	61	66
Italy	69	67	59	63
United Kingdom	34	34	49	49
Hong Kong	29	33	77	70
Japan	67	64	38	42
Korea	50	53	47	42
Taiwan	44	51	47	46
India	-	53	-	65
United States*	56	52	62	67
Total	51	50	55	54

Source: Global Lifestyle Monitor and *Cotton Incorporated's Lifestyle Monitor™.

remains 50%. Over 60% of consumers in Japan, Germany, and Italy always or usually check labels, and over 50% in the United States, Taiwan, and Korea do so. Consumers in Colombia, the United Kingdom, and Hong Kong are least likely to check content labels.

Similarly, more than half of consumers avoid particular fibers when buying clothes. Based on the frequency with which they check fiber content labels, it is not surprising that Germans (66%) and Italians (63%) are likely to avoid certain fibers. But even though only 33% of Hong Kongers frequently check content labels, a surprising 70% say they avoid particular fibers. In all countries other than Brazil, Colombia, Korea, and Hong Kong, avoidance of particular fibers increased from 1999 to 2001. The fibers most often avoided were polyester/Dacron and nylon. Polyester was most likely to be avoided by Indians (46%), Europeans (31%), and North Americans (32%), while nylon was avoided primarily by Indians (57%) and Asians (31%).

These results indicate that consumers are both responding to and influencing changes in the global landscape of apparel retailing. Globalization, casualization, and "fiberization" all are important trends for retailers and manufacturers to consider when targeting new markets.

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