

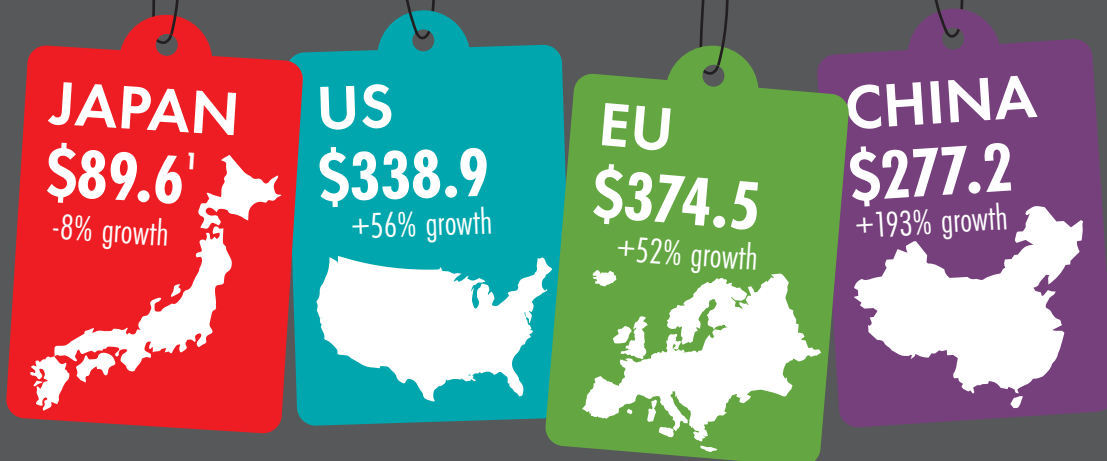


GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: JAPAN

APPAREL SPENDING

Japanese consumers spent a robust \$89.6 billion on clothing in 2017. With a declining population, this number is expected to shrink 8% by 2030. Brands & retailers can gain an edge in this competitive market by understanding their needs and shopping habits.



KEY TRENDS



How They Shop: Help consumers make informed purchases with online product information and expert in-store advice for a seamless shopping experience.

What They Shop: Seize opportunities to meet consumer needs for price-conscious, comfortable clothing without sacrificing quality.

Spotlight on Demographics:
Target middle-aged Japanese women with in-store clothing inspiration as they shop for children, significant others, and themselves.

FINANCIAL OUTLOOK



OPTIMISTIC

Japan

Global

36% 56%

PESSIMISTIC



Japan

Global

28% 11%

* "Neither Optimistic/Pessimistic" not shown

GLOBAL LIFESTYLE MONITOR: JAPAN

HOW THEY SHOP

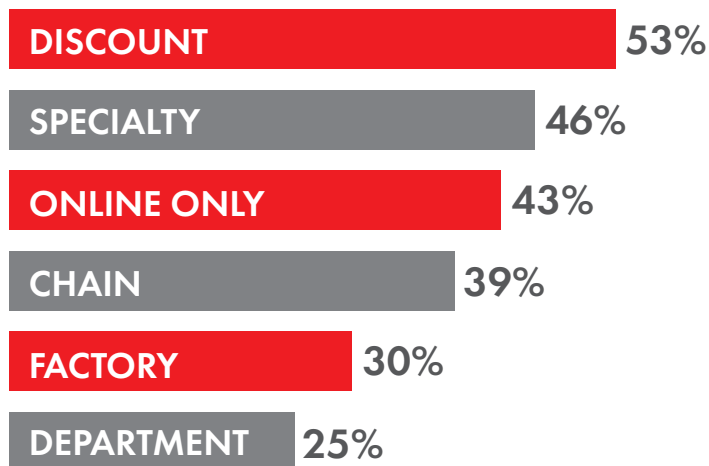
Japan is a highly connected country, with 90% of the population using the internet weekly and more mobile phone accounts than people (130 accounts per 100 individuals)². They use this connectivity to research clothing online before going to physical stores to make purchases, spending more of their shopping journey online than consumers globally. Reach these consumers with an active online presence combined with engaging, informative in-store experiences.

SHOPPING JOURNEY

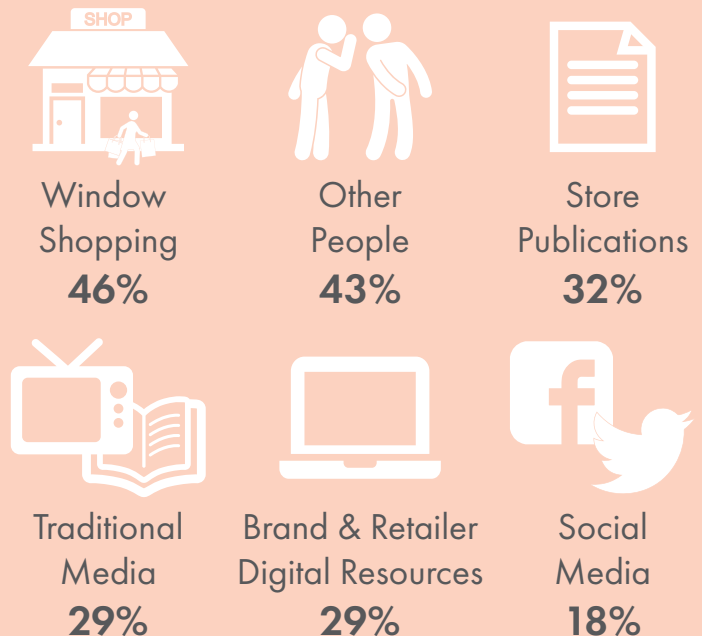
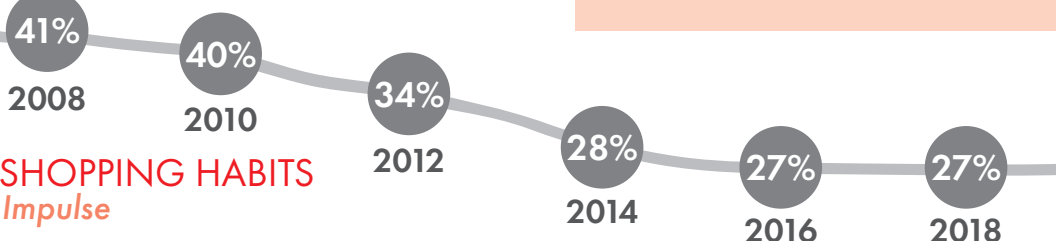
Consumers who prefer in-store shopping



RETAIL STORES SHOPPED FOR CLOTHING



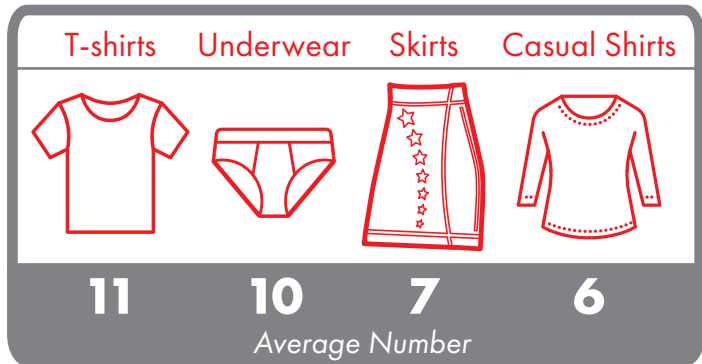
SOURCES FOR CLOTHING IDEAS

APPAREL SHOPPING HABITS
Buying on Impulse

WHAT THEY SHOP

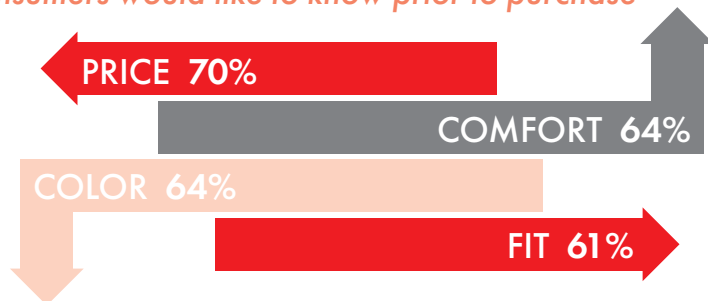
As Japanese consumers' personal financial outlook has steadily risen from 13% optimism in 2010 to 36% in 2018, they are more likely to choose quality over price when purchasing clothing. While still price-conscious, consumers look for comfort, color, and fit when shopping for clothing and are intrigued by clothing with performance features to help monitor and address physical processes such as perspiration and hydration.

TOP ITEMS OWNED

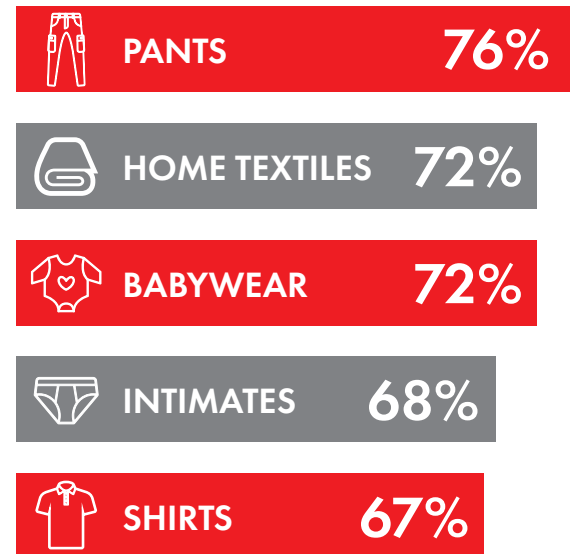


PRIMARY PURCHASE DRIVERS

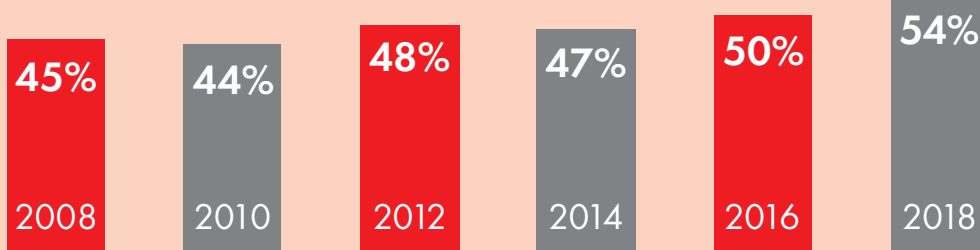
Consumers would like to know prior to purchase



COTTON PREFERRED FIBER

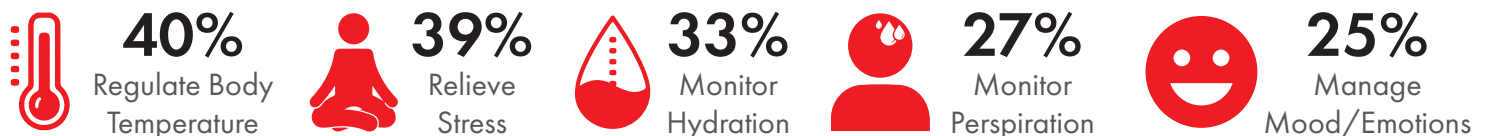


PAY MORE FOR BETTER QUALITY



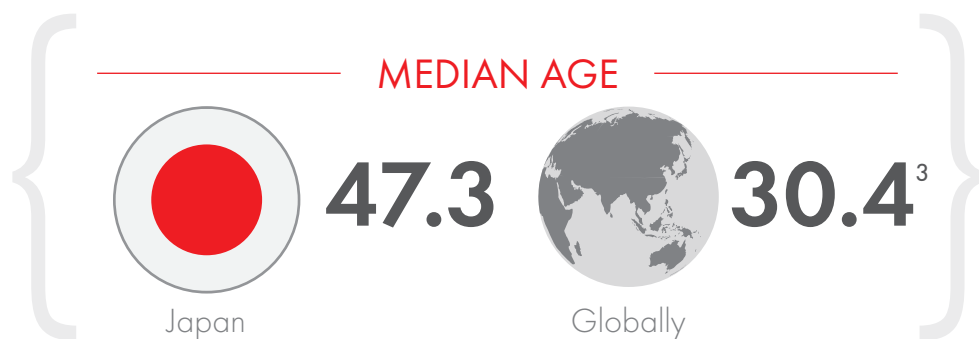
PERFORMANCE APPAREL

Likely to Purchase



SPOTLIGHT

JAPAN'S MIDDLE-AGED WOMEN CONSUMERS



With the second highest median age in the world, companies in Japan increasingly look to target older consumers, many of whom are women. Nearly half of Japanese women 45+ are optimistic about their personal financial circumstances, and 54% regularly purchase clothes for others. Reach these consumers with in-store clothing inspiration and details about items' quality, fiber content, and laundering.

FINANCIAL OUTLOOK

43%
OPTIMISTIC



SHOP FOR OTHERS

54% **33%**
Women 44-54 All Consumers

SHOP ONLINE



25%
at least one time a month

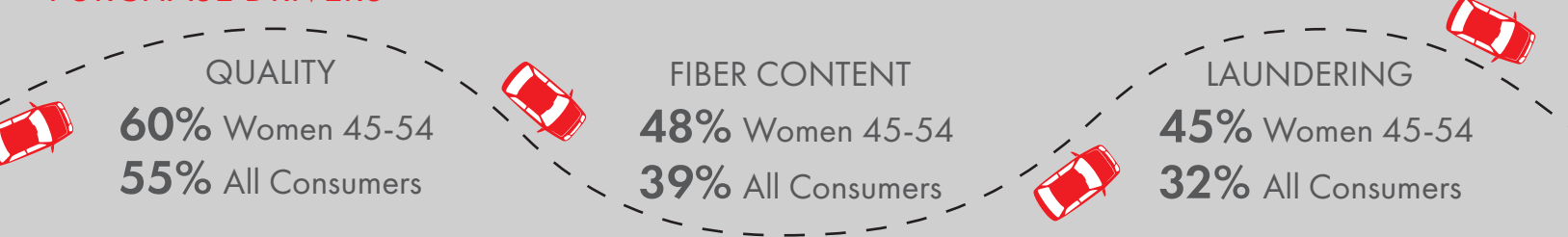
SHOPPING JOURNEY

Percentage of middle-aged women who prefer in-store shopping



79%
prefer cotton or cotton blends for their most-worn clothing

PURCHASE DRIVERS



Source: Cotton Council International and Cotton Incorporated's Global Lifestyle Monitor Survey, a biennial consumer research study. In the 2018 survey approximately 10,000 consumers (i.e. 1,000 consumers in 10 countries) were surveyed. External Source: ¹Euromonitor International ²World Bank ³CIA World Factbook

