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

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.

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.

GLOBAL LIFESTYLE MONITOR: JAPAN

GLOBAL CONSUMER INSIGHTS

JAPAN
$89.6
-8% growth

US
$338.9
+56% growth

EU
$374.5
+52% growth

CHINA
$277.2
+193% growth

FINANCIAL OUTLOOK

OPTIMISTIC
Japan 36% Global 56%

PESSIMISTIC
Japan 28% Global 11%

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* “Neither Optimistic/Pessimistic” not shown
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). 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

- 36% clothing research
- 59% pre-purchase questions
- 69% purchase
- 45% repeat purchase

RETAIL STORES SHopped FOR CLOTHING

- Discount: 53%
- Specialty: 46%
- Online Only: 43%
- Chain: 39%
- Factory: 30%
- Department: 25%

33% Shop online at least 1 time a month.

APPAREL SHOPPING HABITS
Buying on Impulse

- 41% 2008
- 40% 2010
- 34% 2012
- 28% 2014
- 27% 2016
- 27% 2018

SOURCES FOR CLOTHING IDEAS

- Window Shopping: 46%
- Other People: 43%
- Store Publications: 32%
- Traditional Media: 29%
- Brand & Retailer Digital Resources: 29%
- Social Media: 18%
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

<table>
<thead>
<tr>
<th>T-shirts</th>
<th>Underwear</th>
<th>Skirts</th>
<th>Casual Shirts</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
<td>10</td>
<td>7</td>
<td>6</td>
</tr>
</tbody>
</table>

Average Number

PRIMARY PURCHASE DRIVERS
Consumers would like to know prior to purchase

- **Price**: 70%
- **Comfort**: 64%
- **Color**: 64%
- **Fit**: 61%

COTTON PREFERRED FIBER

- **Pants**: 76%
- **Home Textiles**: 72%
- **Babywear**: 72%
- **Intimates**: 68%
- **Shirts**: 67%

PAY MORE FOR BETTER QUALITY

<table>
<thead>
<tr>
<th>2008</th>
<th>2010</th>
<th>2012</th>
<th>2014</th>
<th>2016</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>45%</td>
<td>44%</td>
<td>48%</td>
<td>47%</td>
<td>50%</td>
<td>54%</td>
</tr>
</tbody>
</table>

PERFORMANCE APPAREL
Likely to Purchase

- **Regulate Body Temperature**: 40%
- **Relieve Stress**: 39%
- **Monitor Hydration**: 33%
- **Monitor Perspiration**: 27%
- **Manage Mood/Emotions**: 25%

71% prefer cotton or cotton blends for their most-worn clothing.
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 laundring.

**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 Sources: ¹Euromonitor International ²World Bank ³CIA World Factbook