# GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: MEXICO

APPAREL SPENDING

Mexican consumers spent $17.9 billion on clothing in 2017, or $140 per person. A projected 37% growth in apparel spending by 2030 is expected to outpace population growth. Seize opportunities by offering cotton-rich clothing, especially denim jeans, and interactive shopping experiences.

MEXICO $17.7[1]
+110% growth

US $338.9
+56% growth

EU $374.5
+52% growth

CHINA $277.2
+193% growth
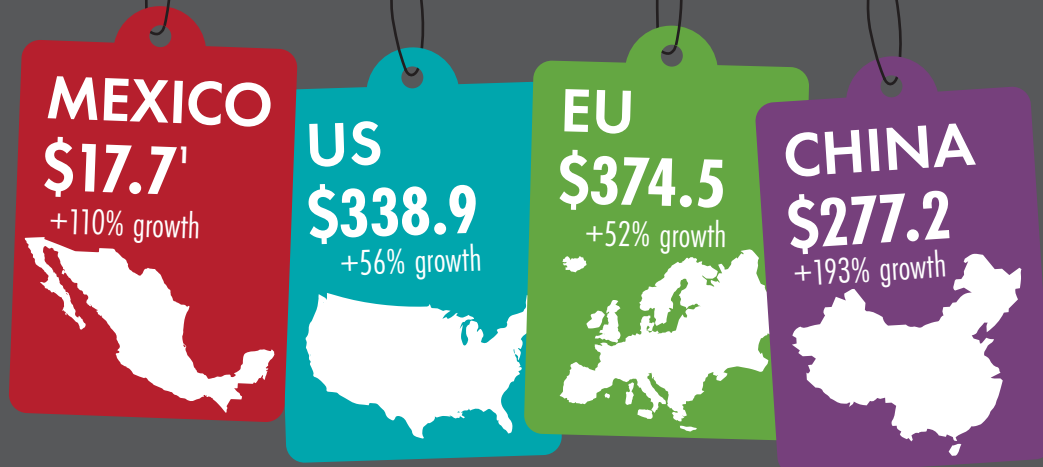
KEY TRENDS

How They Shop: Promote interaction in-store and online to meet the consumer's desire for authentic, personal shopping experiences.

What They Shop: Meet consumer demand for high quality, comfortable, and durable clothing with cotton fabrics.

Spotlight on Denim Jeans: Market denim jeans to receptive Mexican consumers by touting the garments' versatility, durability, and connection to Mexican culture.

FINANCIAL OUTLOOK

OPTIMISTIC

Mexico	Global
60%	56%

PESSIMISTIC

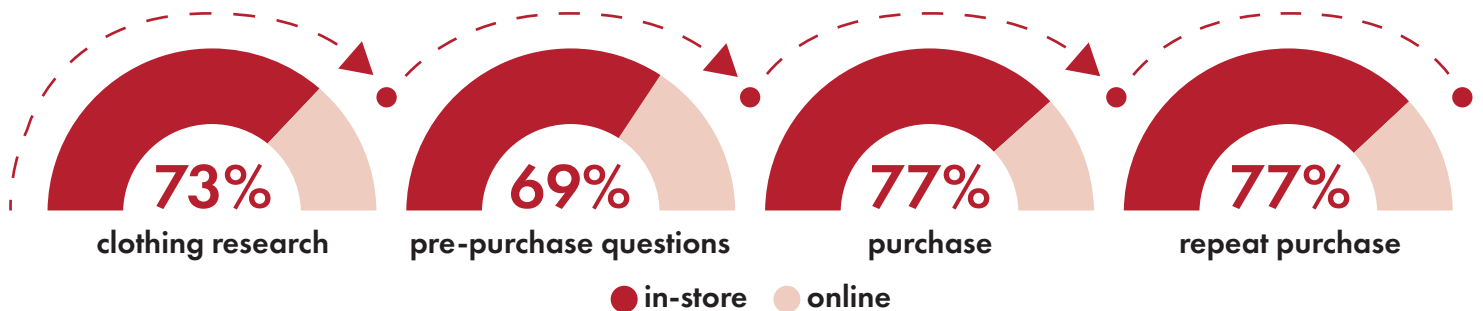| Mexico	Global
7%	11%

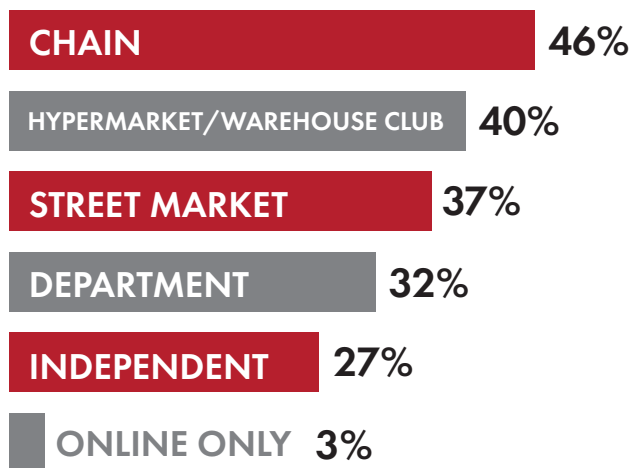*"Neither Optimistic/Pessimistic" not shown

HOW THEY SHOP

Traditional retail dominates Mexico's apparel market, as nearly three in four consumers prefer to research and purchase clothing in physical stores. Though 59% of the population uses the internet weekly[1], only half (49%) have ever shopped online for clothing, either to browse for ideas or purchase items. Instead, Mexican consumers prefer to interact in-person throughout their shopping journey, showing a higher preference for in-store experiences compared to global consumer averages. Reach these consumers by maintaining this human element with interactive in-person and online experiences.

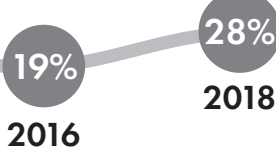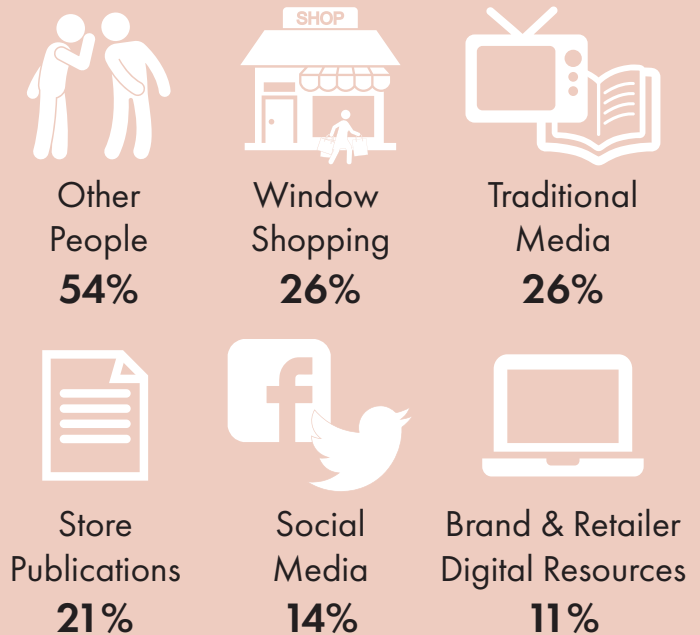## SHOPPING JOURNEY
Consumers who prefer in-store shopping

73%	69%	77%	77%
clothing research	pre-purchase questions	purchase	repeat purchase

● in-store ● online

RETAIL STORES SHOPPED FOR CLOTHING

- **CHAIN** — **46%**
- **HYPERMARKET/WAREHOUSE CLUB** — **40%**
- **STREET MARKET** — **37%**
- **DEPARTMENT** — **32%**
- **INDEPENDENT** — **27%**
- **ONLINE ONLY** — **3%**

21% Shop online at least 1 time a month.

APPAREL SHOPPING HABITS
Buying Clothes on Impulse

- **19%** 2016
- **28%** 2018

SOURCES FOR CLOTHING IDEAS

Other People **54%**	Window Shopping **26%**	Traditional Media **26%**
Store Publications **21%**	Social Media **14%**	Brand & Retailer Digital Resources **11%**

Of those who seek clothing ideas on social media, **98%** look to Facebook.

COTTON USA cotton®

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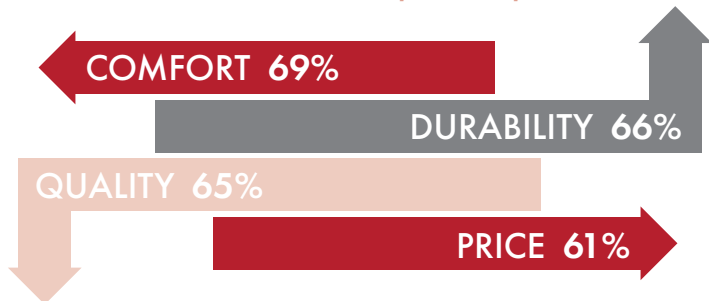
WHAT THEY SHOP

Mexican consumers look for clothing that is comfortable, durable, high quality, and at a price they can afford. Clothing made of cotton-rich fabrics meet these purchase drivers, especially babywear and intimates. An interest in new performance technologies to help address physical process, such as perspiration and hydration, and more easily use electronic devices provides opportunities for innovative offerings.
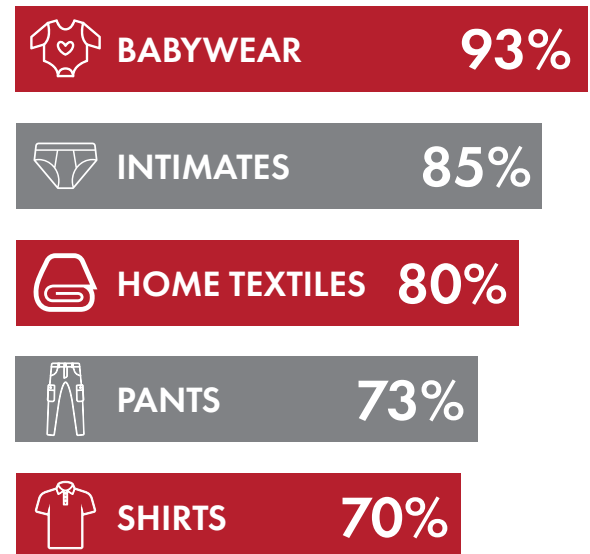
TOP ITEMS OWNED

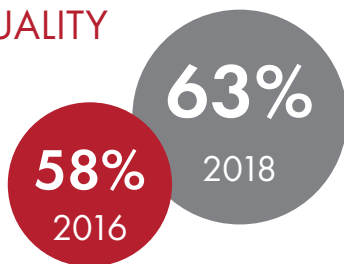| Underwear	T-shirts	Jeans	Casual Shirts
12	9	8	7

Average Number

COTTON AS PREFERRED FIBER

BABYWEAR		93%
INTIMATES		85%
HOME TEXTILES		80%
PANTS		73%
SHIRTS		70%

PRIMARY PURCHASE DRIVERS
Consumers would like to know prior to purchase

COMFORT **69%**

DURABILITY **66%**

QUALITY **65%**

PRICE **61%**

PAY MORE FOR BETTER QUALITY

63% 2018

58% 2016

89% say cotton and cotton blends are best suited for current fashions.

87% prefer cotton and cotton blends for their most-worn clothing
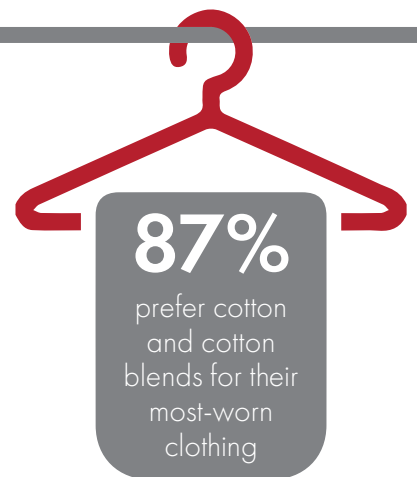
PERFORMANCE APPAREL
Likely to Purchase

51% Regulate Body Temperature

51% Relieve Stress

48% Charge Electronics

47% Monitor Hydration

**46%** Control Electronics

CONSUMERS WHO OWN DENIM JEANS

98%

Mexico

Mexican consumers love denim jeans, and it is no wonder. The country is one of the largest manufacturers of denim, and the fabric has a strong cultural heritage in Mexico. Nearly all Mexican consumers (98%) own at least one pair of denim jeans, and one in four (23%) report wearing jeans every day of the week. Draw on Mexico's cultural and economic affinity for denim to market these durable and versatile garments.

DENIM JEANS AVERAGES
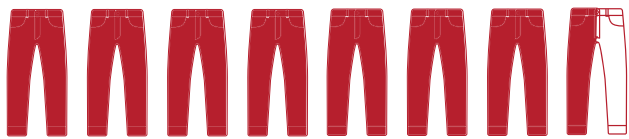
7.5 PAIRS OWNED/PER PERSON

| SUN | MON | TUE | WED | THU | FRI | SAT |

4.6 DAYS PER WEEK WORN

OCCASIONS DENIM JEANS PREFERRED

WOMEN

44% WORKING

32% RUNNING ERRANDS

26% WANT TO BE STYLISH

22% WANT TO FEEL GOOD

MEN

54% WORKING

36% OUT TO DINNER

31% WANT TO BE STYLISH

AFFINITY FOR DENIM JEANS

15% MY WARDROBE IS FULL OF DENIM

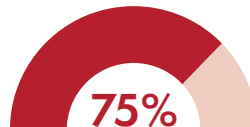**56%** I ENJOY WEARING DENIM REGULARLY
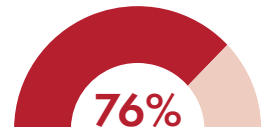
23% I HAVE SOME DENIM CLOTHES

6% DENIM IS NOT FOR ME

71% LOVE OR ENJOY WEARING DENIM

75% under 35

76% men

76% upper/middle class

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