German consumers spent $73 billion on clothing in 2017, continuing its steady growth since the global recession of 2008. Consumer spending on apparel is expected to continue expanding for a 39% growth by 2030. Reach savvy German consumers with integrated digital and traditional marketing and versatile, high quality clothing offerings.

**How They Shop:** Help consumers plan clothes shopping with cohesive online and in-person campaigns.

**What They Shop:** Meet consumer demands for comfort and quality with cotton-rich basics and outerwear.

**Spotlight on Denim Jeans:** Reach denim-hungry German consumers with communication about denim jeans’ versatility, comfort, and style.

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**GLOBAL LIFESTYLE MONITOR: GERMANY**

**APPAREL SPENDING**

German consumers spent $73 billion on clothing in 2017, continuing its steady growth since the global recession of 2008. Consumer spending on apparel is expected to continue expanding for a 39% growth by 2030. Reach savvy German consumers with integrated digital and traditional marketing and versatile, high quality clothing offerings.

**GROWTH:**

- **Germany**: $73 billion (39% growth)
- **US**: $338.9 billion (56% growth)
- **EU**: $374.5 billion (52% growth)
- **China**: $277.2 billion (193% growth)

**FINANCIAL OUTLOOK**

- **OPTIMISTIC**
  - Germany: 47%
  - Global: 56%
- **PESSIMISTIC**
  - Germany: 11%
  - Global: 11%

*“Neither Optimistic/Pessimistic” not shown*
German consumers shop at four types of stores on average - the most of all ten countries studied - both online and in-store. Nine in ten (89%) Germans use the internet at least weekly and nearly all (96%) have shopped for clothing online. With impulse buying on the decline, German consumers gather clothing inspiration online via social media and retail resources, as well as using in-person sources such as friends and in-store displays. Offer integrated online and in-person communication to help German consumers plan their clothes shopping.

### SHOPPING JOURNEY

**Consumers who prefer shopping in-store vs. online**

- **Clothing research**
  - In-store: 38%
  - Online: 67%

- **Pre-purchase questions**
  - In-store: 57%
  - Online: 43%

- **Purchase**
  - In-store: 32%
  - Online: 68%

- **Repeat purchase**
  - In-store: 67%
  - Online: 33%

### RETAIL STORES SHopped FOR CLOTHING

- **Chain**: 65%
- **Online Only**: 57%
- **Specialty**: 45%
- **Department**: 45%
- **Mono-brand**: 42%

### SOURCES FOR CLOTHING IDEAS

- **Other People**: 54%
- **Window Shopping**: 34%
- **Brand & Retailer Digital Resources**: 28%
- **Store Publications**: 26%
- **Traditional Media**: 21%
- **Social Media**: 14%

### APPAREL SHOPPING HABITS

**Buying Clothes on Impulse**

- 68% in 2008
- 63% in 2010
- 62% in 2012
- 57% in 2014
- 55% in 2016
- 48% in 2018

48% Shop online at least once per month.
WHAT THEY SHOP

German consumers look for comfort and quality in their clothing, and are willing to pay more to find that quality. They own many basics – the most underwear and t-shirts of consumers in any country studied – and pair these with denim jeans, dresses, and other fashionable outerwear. Germans look for cotton in their most-worn clothing and especially prefer the fiber for bottomswear and babywear. Offer basics and outerwear in cotton-rich fabrics that provide the quality and function German consumers seek.

TOP ITEMS OWNED

<table>
<thead>
<tr>
<th>Underwear</th>
<th>T-shirts</th>
<th>Denim Jeans</th>
<th>Dresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>22</td>
<td>21</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

Average Number Owned

COTTON AS PREFERRED FIBER

<table>
<thead>
<tr>
<th>PANTS &amp; JEANS</th>
<th>81%</th>
</tr>
</thead>
<tbody>
<tr>
<td>BABYWEAR</td>
<td>80%</td>
</tr>
<tr>
<td>HOME TEXTILES</td>
<td>76%</td>
</tr>
<tr>
<td>INTIMATES</td>
<td>75%</td>
</tr>
<tr>
<td>SHIRTS</td>
<td>70%</td>
</tr>
</tbody>
</table>

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>76%</td>
<td>75%</td>
<td>68%</td>
<td>66%</td>
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<td>68%</td>
<td>76%</td>
</tr>
</tbody>
</table>

PERFORMANCE APPAREL

Likely to Purchase

- 34% Regulate Body Temperature
- 25% Relieve Stress
- 24% Illuminate When Needed
- 21% Monitor Hydration
- 20% Monitor Perspiration

INFO: MARKETINFORMATION@COTTONINC.COM LIFESTYLEMONITOR.COTTONINC.COM ©2018
Denim is the overwhelming choice of German consumers when they want to blend fashion, function, and comfort. Germans own an average of seven pairs of jeans, the most of any consumers outside Latin America. The garment is a fashion item, particularly for younger German consumers, and is prized for its comfort by older consumers. White and blue collar workers view jeans as functional and stylish workwear, as nearly half wear them five or more days per week. Market denim’s fashion, function, and comfort to German consumers looking for bottomswear suitable for many occasions.

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