

# GLOBAL CONSUMER INSIGHTS



## GLOBAL LIFESTYLE MONITOR: ITALY

### APPAREL SPENDING

Italian consumers spent \$60 billion on clothing in 2017, or \$990 per person. After a period of ups and downs, spending is expected to grow steadily 40% by 2030. With lower than average optimism about their personal finances, Italian consumers mix price-consciousness with a desire for well-made, fashionable, and functional clothing.



## KEY TRENDS



**How They Shop:** Pair online inspiration with dynamic in-person experiences for an integrated shopping journey.

**What They Shop:** Help consumers look and feel good with quality basics and performance clothing made with cotton-rich fabrics.

**Spotlight on Fiber Content:** Speak to Italian consumers' concern for quality workmanship with clear fiber content information displayed online and labeled on garments.

### FINANCIAL OUTLOOK



OPTIMISTIC

Italy 33% Global 56%

PESSIMISTIC



Italy 16% Global 11%

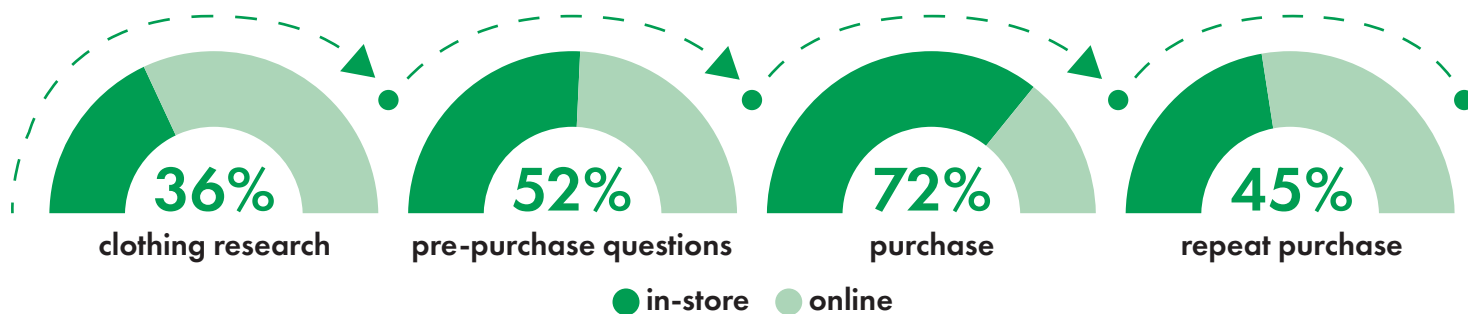
\* "Neither Optimistic/Pessimistic" not shown

## HOW THEY SHOP

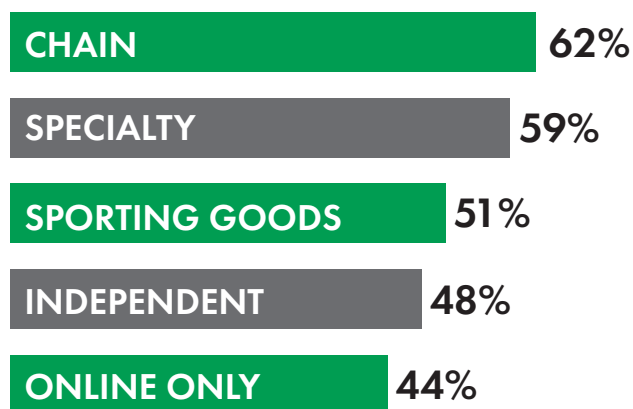
Italian consumers enjoy shopping for clothes (77%) both in-store and online. While regular (weekly or more) internet use (70%) is below the EU (81%)<sup>1</sup>, over nine in ten (93%) Italians have used the internet to shop for clothing, most often to gather ideas and research prices. Two-thirds (67%) of Italian consumers also enjoy the experience of shopping for clothes in a physical store, preferring to make their purchases in person. Optimize digital resources to provide clothing ideas and information while investing in dynamic in-person retail experiences.

## SHOPPING JOURNEY

Consumers who prefer shopping in-store (vs. online)

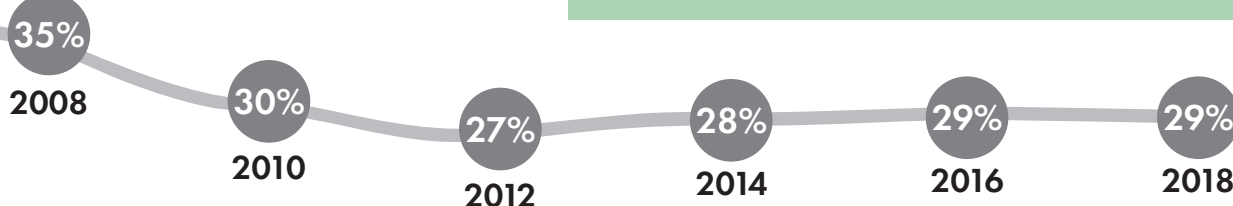


## RETAIL STORES SHOPPED FOR CLOTHING



## APPAREL SHOPPING HABITS

Buying Clothes on Impulse



## SOURCES FOR CLOTHING IDEAS



Other People  
**50%**



Window Shopping  
**44%**



Traditional Media  
**30%**



Store Publications  
**27%**



Brand & Retailer Digital Resources  
**25%**

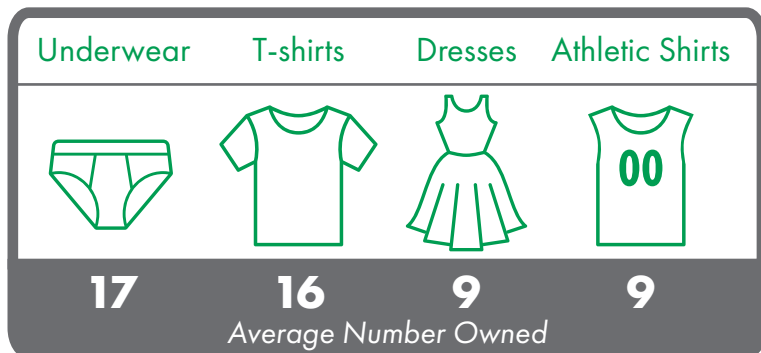


Social Media  
**15%**

## WHAT THEY SHOP

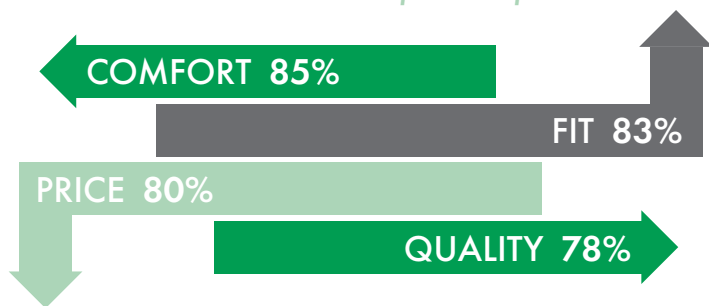
Italian consumers look for clothes that provide comfort, fit, and quality at the right price, leading them to prefer cotton-rich fabrics for their most-worn clothing. Like other Europeans, they own many basic garments, including underwear and t-shirts. They want their clothing to perform, as one-third to one-half say they are likely to purchase clothing that can monitor and address physical processes such as temperature and hydration. Mix comfort, performance, and quality by offering selection of price-conscious basics and performance clothing made with cotton-rich fabrics.

### TOP ITEMS OWNED

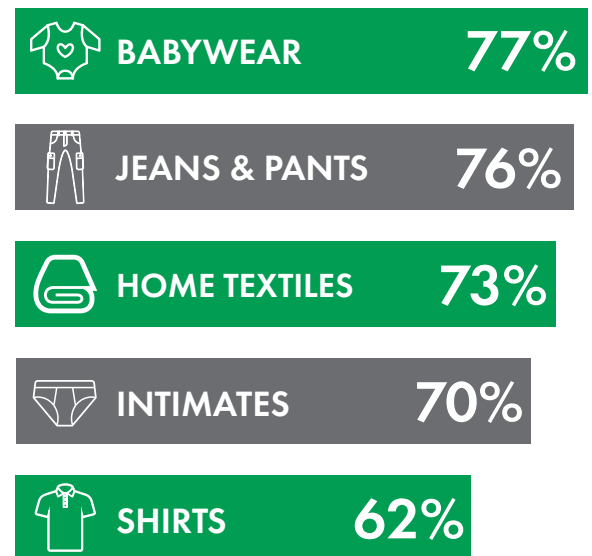


### PRIMARY PURCHASE DRIVERS

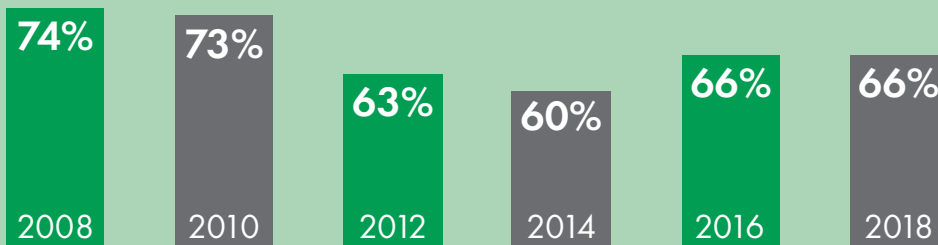
Consumers would like to know prior to purchase



### COTTON AS PREFERRED FIBER



### PAY MORE FOR BETTER QUALITY



### PERFORMANCE APPAREL

Likely to Purchase



**48%**

Regulate Body Temperature



**43%**

Relieve Stress



**40%**

Monitor Hydration



**37%**

Monitor Perspiration



**34%**

Illuminate When Needed

# SPOTLIGHT

## FIBER CONTENT

OFTEN LOOK FOR FIBER CONTENT LABELS PRIOR TO PURCHASE



**76%**  
Italy



**56%**  
Globally

Consumers in Italy care about the fiber content of their clothing. Three in four (76%) say they always or usually check the fiber content label on clothing before purchase, compared to 56% of consumers globally clothing. Almost half (47%) specifically seek or avoid particular fibers, most often looking for cotton when purchasing clothing. For these consumers, cotton signals authenticity, reliability, and sustainability. Meet this consumer need by offering cotton-rich clothing with prominently displayed fiber content information.

### LOOK FOR FIBER CONTENT LABELS



**71%**  
would pay more  
for clothing  
made from  
natural fibers

### CLOTHING FIBER CHOICE *Consumers Who Seek or Avoid Particular Fibers*



#### COTTON

SEEK

AVOID

**90%** **<1%**



#### OTHER NATURAL

SEEK

AVOID

**65%** **10%**



#### SYNTHETIC

SEEK

AVOID

**25%** **79%**

### COTTON CLOTHING ATTRIBUTES

*Consumers Who Say The Following Attributes Best Describe Cotton Clothing*

**81%**

MOST  
AUTHENTIC

**77%**

MOST  
RELIABLE

**77%**

MOST  
SUSTAINABLE

**74%**

MOST  
TRUSTWORTHY

**70%**

MOST  
COMFORTABLE

**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: 'Euromonitor International'

