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

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.

**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.

**GLOBAL LIFESTYLE MONITOR: ITALY**

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.

**FINANCIAL OUTLOOK**

Optimistic

<table>
<thead>
<tr>
<th>Country</th>
<th>Optimistic</th>
<th>Pessimistic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>33%</td>
<td>16%</td>
</tr>
<tr>
<td>Global</td>
<td>56%</td>
<td>11%</td>
</tr>
</tbody>
</table>

*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%)¹, 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)

```
36% clothing research
52% pre-purchase questions
72% purchase
45% repeat purchase
```

in-store online

RETAIL STORES SHopped FOR CLOTHING

- CHAIN: 62%
- SPECIALTY: 59%
- SPORTING GOODS: 51%
- INDEPENDENT: 48%
- ONLINE ONLY: 44%

SOURCES FOR CLOTHING IDEAS

```
Other People: 50%
Window Shopping: 44%
Traditional Media: 30%
```

APPAREL SHOPPING HABITS

Buying Clothes on Impulse

```
35% 2008
30% 2010
27% 2012
28% 2014
29% 2016
29% 2018
```

1. EU average as of 2018
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

<table>
<thead>
<tr>
<th>Underwear</th>
<th>T-shirts</th>
<th>Dresses</th>
<th>Athletic Shirts</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>16</td>
<td>9</td>
<td>9</td>
</tr>
</tbody>
</table>

Average Number Owned

PRINCIPAL PURCHASE DRIVERS

Consumers would like to know prior to purchase

- **Comfort**: 85%
- **Fit**: 83%
- **Price**: 80%
- **Quality**: 78%

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>74%</td>
<td>73%</td>
<td>63%</td>
<td>60%</td>
<td>66%</td>
<td>66%</td>
</tr>
</tbody>
</table>

COTTON AS PREFERRED FIBER

- **Babywear**: 77%
- **Jeans & Pants**: 76%
- **Home Textiles**: 73%
- **Intimates**: 70%
- **Shirts**: 62%

PERFORMANCE APPAREL

Likely to Purchase

- **Regulate Body Temperature**: 48%
- **Relieve Stress**: 43%
- **Monitor Hydration**: 40%
- **Monitor Perspiration**: 37%
- **Illuminate When Needed**: 34%

INFO: MARKETINFORMATION@COTTONINC.COM LIFESTYLEMONITOR.COTTONINC.COM ©2018
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. 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**

- **37%** always
- **39%** most of the time
- **20%** sometimes
- **4%** never

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

**CLOTHING FIBER CHOICE**

- **COTTON**
  - Seek: 90%
  - Avoid: <1%

- **OTHER NATURAL**
  - Seek: 65%
  - Avoid: 10%

- **SYNTHE TIC**
  - Seek: 25%
  - Avoid: 79%

**COTTON CLOTHING ATTRIBUTES**

- Most authentic: 81%
- Most reliable: 77%
- Most sustainable: 77%
- Most trustworthy: 74%
- Most comfortable: 70%

**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