

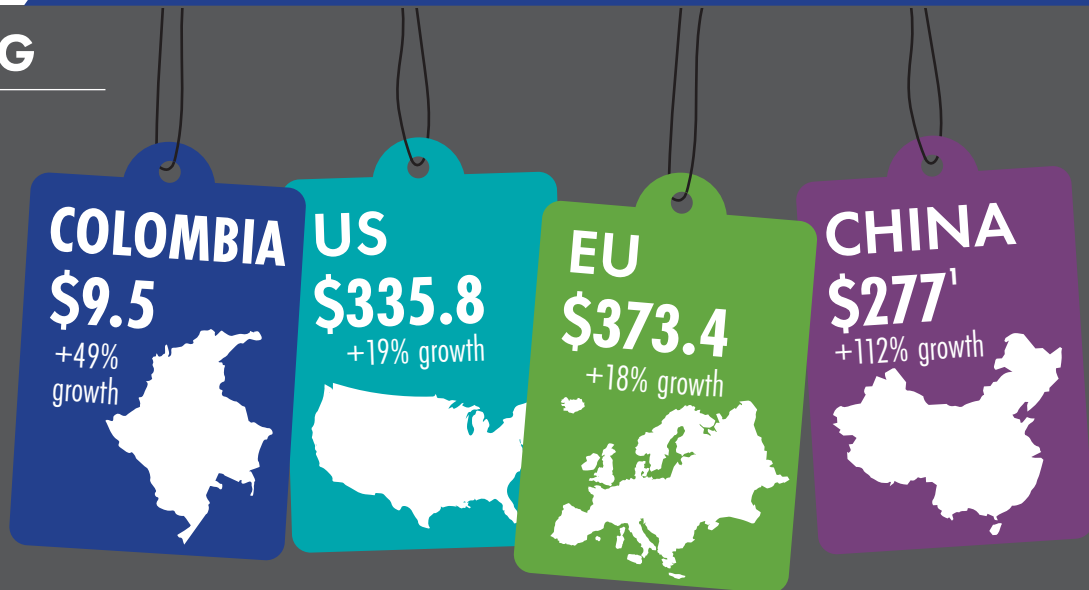


GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: COLOMBIA

APPAREL SPENDING

Colombia is a growing market for clothing brands and retailers. Consumers spent \$9.5 billion on clothing in 2017, and this number is expected to grow 49% by 2030. Overwhelming optimism about their personal finances provides opportunities for companies to reach Colombian consumers with new fashions and dynamic retail experiences.



KEY TRENDS



How They Shop: Mix entertainment and commerce with in-person retail experiences suited to each phase of the shopping journey.

What They Shop: Help consumers look and feel good with new technologies to provide comfort and quality throughout the day.

Spotlight on the Evolving Shopping Journey: Invest in social media clothing inspiration as Colombians integrate online channels into their shopping journey.

FINANCIAL OUTLOOK

OPTIMISTIC

Colombia 78% Global 56%

PESSIMISTIC

Colombia 4% Global 11%

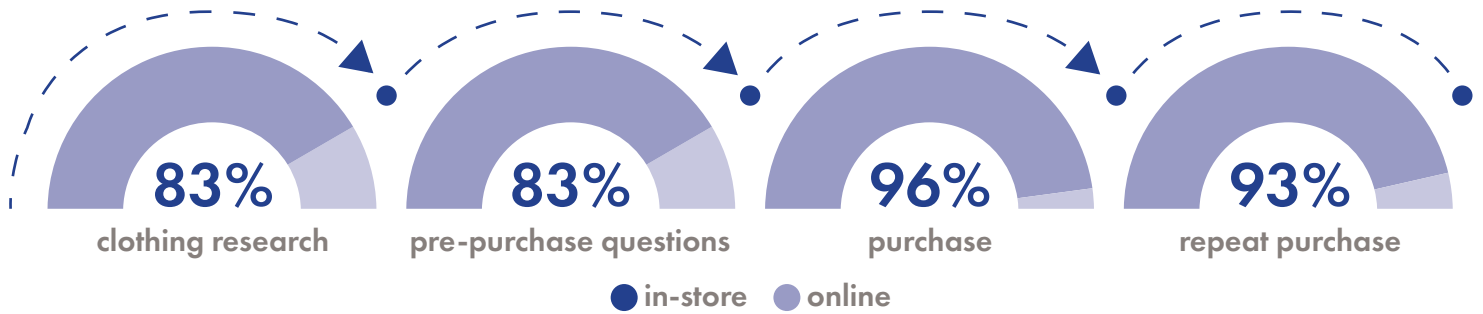
**"Neither Optimistic/Pessimistic" not shown*

HOW THEY SHOP

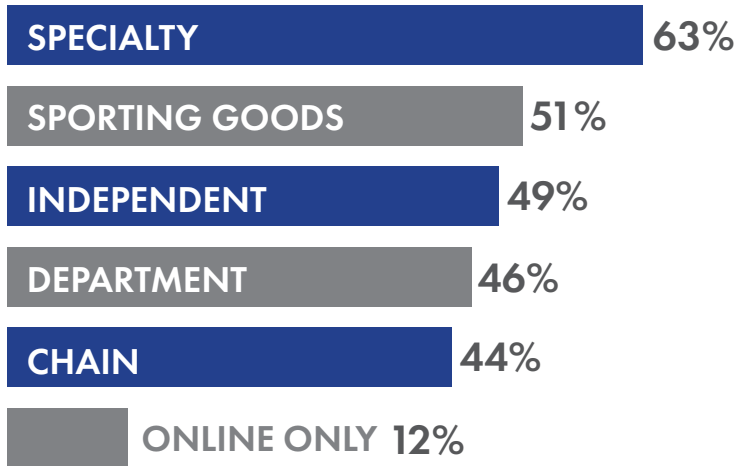
Colombian consumers enjoy shopping for clothes (86%), and this means traditional in-person retail for each stage of the shopping journey. Despite internet use by 58% of the population², just over one third (36%) have ever used the internet to browse or buy clothing. Maximize the market potential of these consumers by investing in dynamic in-person retail experiences.

SHOPPING JOURNEY

Consumers who prefer in-store shopping



RETAIL STORES SHOPPED FOR CLOTHING



14%

Shop online at least 1 time a month.

SOURCES FOR CLOTHING IDEAS



Other People
82%



Window Shopping
40%



Traditional Media
37%



Store Publications
34%



Social Media
26%



Brand & Retailer Digital Resources
15%

APPAREL SHOPPING HABITS

Buying Clothes on Impulse

34%

2008

21%

2010

21%

2012

26%

2016

26%

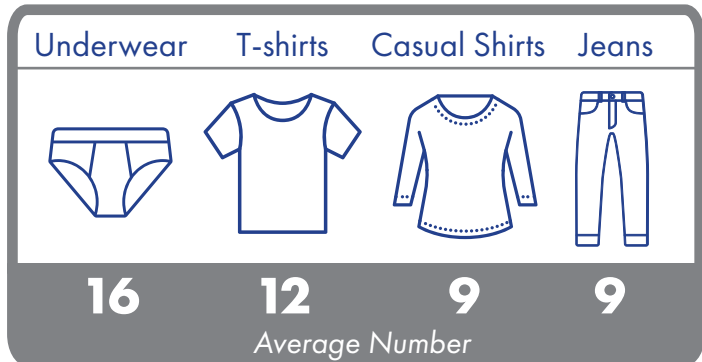
2018



WHAT THEY SHOP

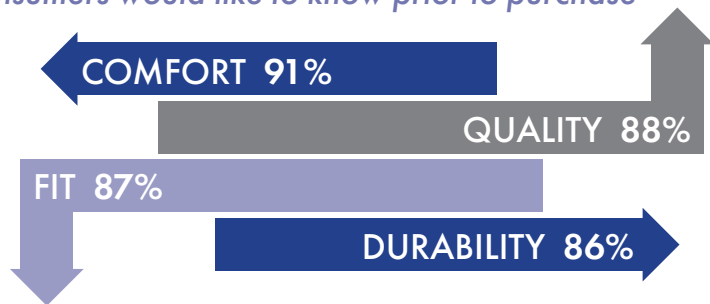
Colombians are discerning clothes consumers. They look for clothes that provide comfort, quality, fit, and durability, leading them to prefer cotton-rich fabrics especially for items worn close to the skin. They are willing to pay more for quality, and want their clothing to do more by addressing physical processes such as perspiration. Help Colombian consumers take their fashion sense to the next level with new technologies made of cotton-rich fabrics to provide the comfort, quality, and style they seek.

TOP ITEMS OWNED



PRIMARY PURCHASE DRIVERS

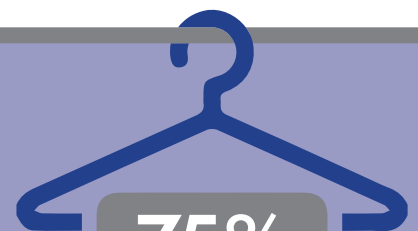
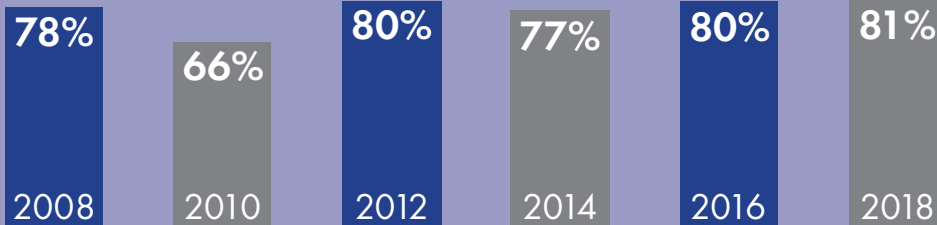
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER



PAY MORE FOR BETTER QUALITY

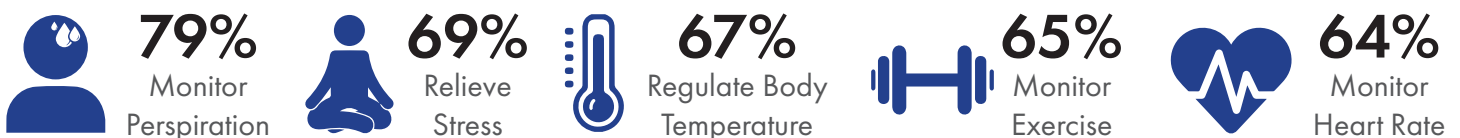


75%

prefer cotton or cotton blends for their most-worn clothing

PERFORMANCE APPAREL

Likely to Purchase



SPOTLIGHT

EVOLVING THE SHOPPING JOURNEY

AVERAGE NUMBER OF GARMENTS OWNED



103

Colombia



75³

Globally

Colombian consumers stand out for their love of clothes shopping, owning 33% more garments than the average for consumers across the world. Nine in ten enjoy the in-store shopping experience, and half cite this enjoyment as the reason they do not shop online. An increasing number of Colombian consumers are incorporating online sources as they look for new clothing ideas, and social media is especially popular among younger Colombians. Get ahead of this changing market by integrating online and social media into the in-store shopping experience.

SHOPPING AFFINITY



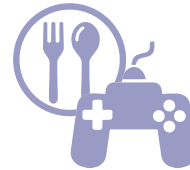
86%

LOVE/LIKE CLOTHES SHOPPING



89%

ENJOY IN-STORE EXPERIENCE



20%

PREFER TO NOT SPEND MONEY ON CLOTHES

REASONS TO NOT SHOP ONLINE

PREFER IN-STORE EXPERIENCE

51%

UNSURE OF CLOTHING QUALITY

47%

CLOTHING MAY NOT FIT

44%

DON'T TRUST ORDER PROCESS

43%

DON'T TRUST WEBSITES

36%

ONLINE CLOTHING INSPIRATION

9%

2016

33%

2018

Use Social Media for Clothing Ideas

15-24 **39%**

35-44 **16%**

25-34 **27%**

45-54 **10%**



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 ²World Bank