

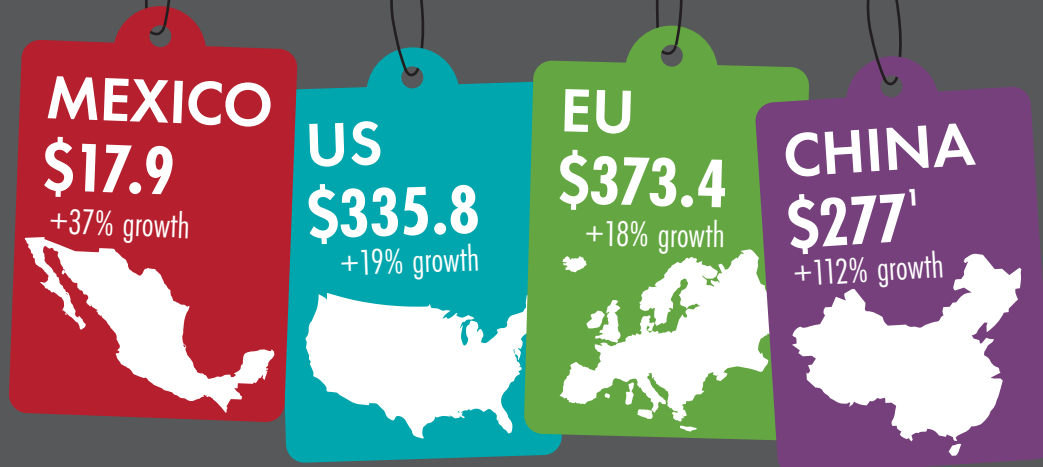
GLOBAL CONSUMER INSIGHTS



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.



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 60% Global 56%

PESSIMISTIC

Mexico 7% Global 11%

* "Neither Optimistic/Pessimistic" not shown

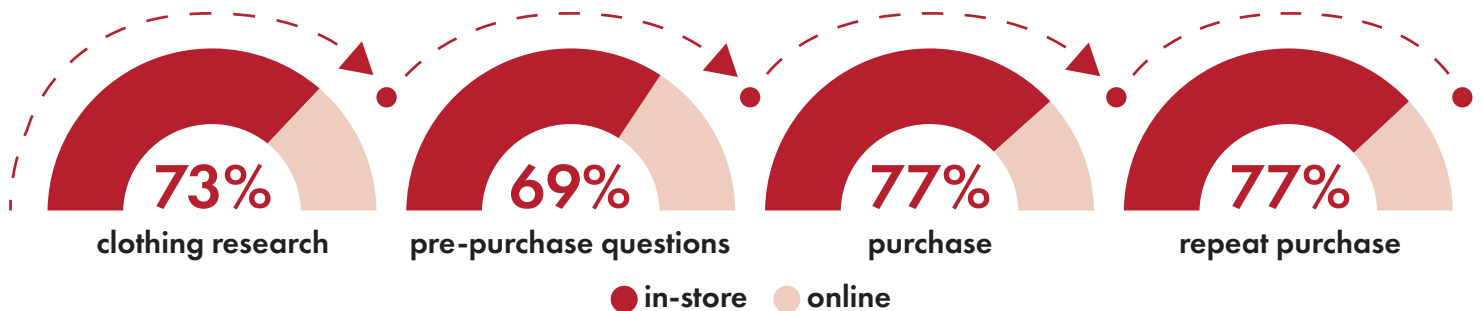
GLOBAL LIFESTYLE MONITOR: MEXICO

HOW THEY SHOP

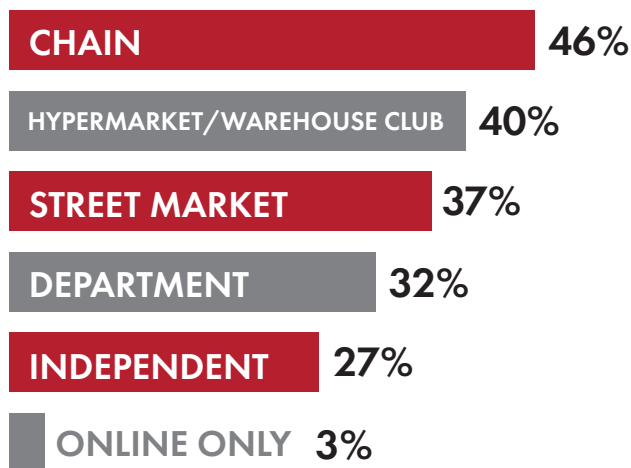
Traditional retail dominates Mexico's apparel market, as nearly three in four consumers prefer to research and purchase clothing in physical stores. Though 59% of the population uses the internet², only half (49%) have ever shopped online for clothing, either to browse for ideas or purchase items. Instead, 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



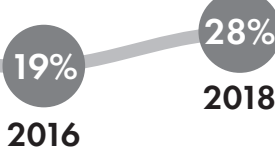
RETAIL STORES SHOPPED FOR CLOTHING



21% Shop online at least 1 time a month.

APPAREL SHOPPING HABITS

Buying Clothes on Impulse



SOURCES FOR CLOTHING IDEAS



Other People
54%



Window Shopping
26%



Traditional Media
26%



Store Publications
21%



Social Media
14%



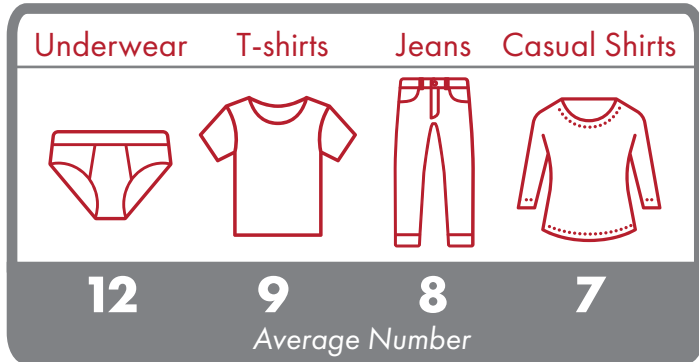
Brand & Retailer Digital Resources
11%

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

WHAT THEY SHOP

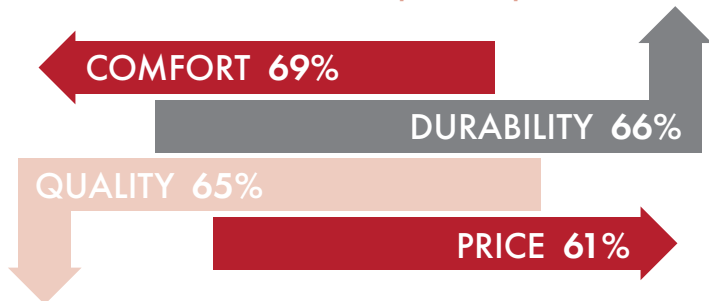
Mexican consumers look for clothing that is comfortable, durable, high quality, and at a price they can afford. Clothing made of cotton-rich fabrics meet these purchase drivers, especially babywear and intimates. An interest in new performance technologies to help address physical process, such as perspiration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

TOP ITEMS OWNED

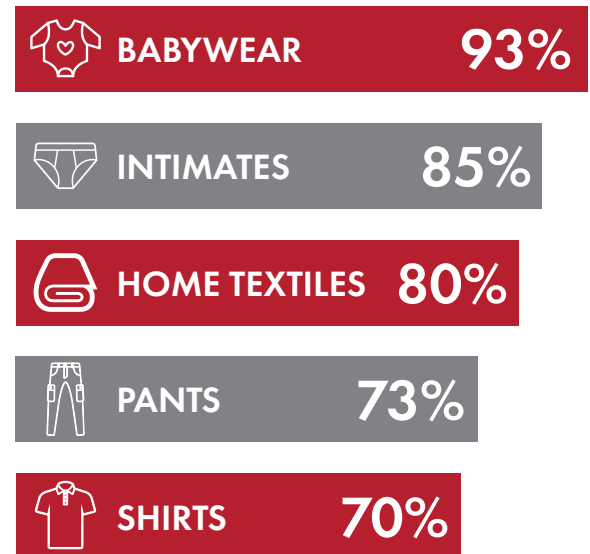


PRIMARY PURCHASE DRIVERS

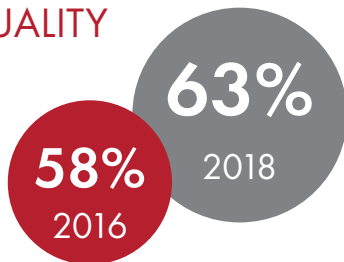
Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER



PAY MORE FOR BETTER QUALITY



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



PERFORMANCE APPAREL

Likely to Purchase



51%

Regulate Body Temperature



51%

Relieve Stress



48%

Charge Electronics



47%

Monitor Hydration



46%

Control Electronics

SPOTLIGHT

DENIM JEANS

CONSUMERS WHO
OWN DENIM JEANS

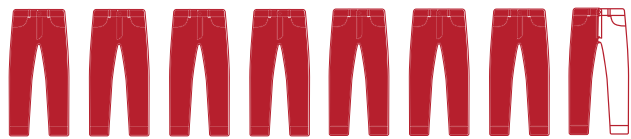


Mexico

98%

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



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%

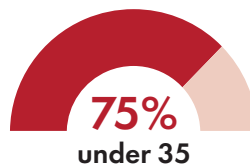
I HAVE
SOME DENIM
CLOTHES



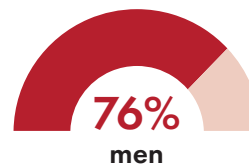
6%

DENIM
IS NOT
FOR ME

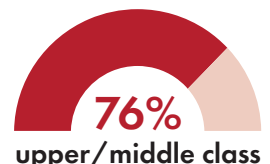
71% LOVE OR ENJOY WEARING DENIM



under 35



men



upper/middle class

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

