

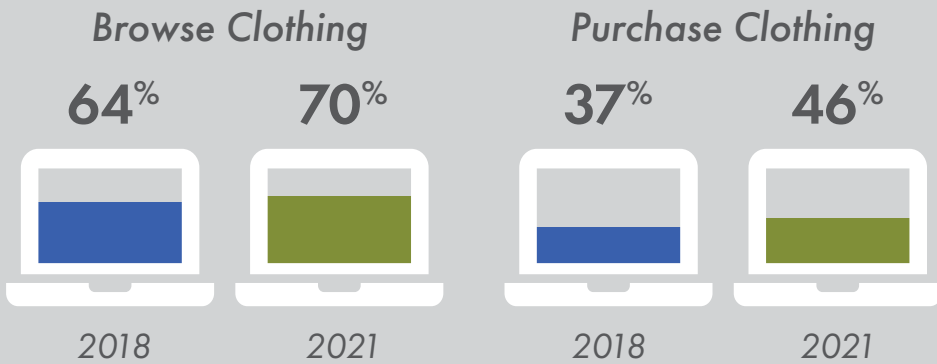
GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: EUROPE (U.K., GERMANY, ITALY)



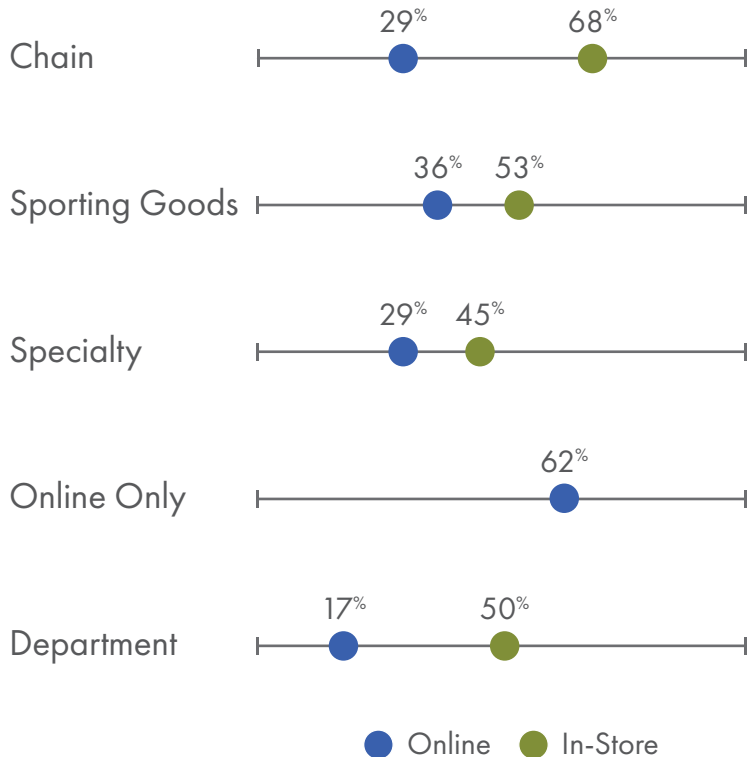
PREFERENCE FOR ONLINE SHOPPING GROWS

Percent who prefer online shopping to:



82%
Shop for clothing online

RETAIL STORES SHOPPED FOR CLOTHING



SOURCES FOR CLOTHING IDEAS



42% **Other People**
Friends & colleagues, Family, People you see on the street



33% **Traditional Media**
TV, Magazines, Celebrities



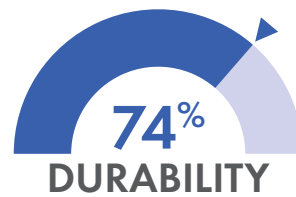
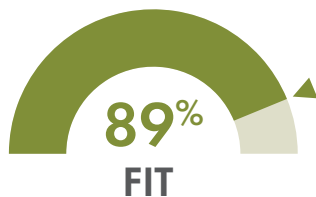
32% **Retailer Marketing**
In-store displays, Salespeople, Catalogs, Store fliers



30% **Online**
Brand and retailer websites, Retailer email and apps, Social media, Blogs

PRIMARY PURCHASE DRIVERS

Important to clothing purchase:



COTTON CLOTHING BEST DESCRIBED AS



60% usually check fiber content labels before purchasing clothing



PERFORMANCE APPAREL

Likely to Pay More for Everyday Clothing With:

