

Global Lifestyle Monitor IV – Colombia Report

Prepared for Cotton Council International

Prepared by Synovate

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Overall Background

Since 1998, Cotton Council International (CCI) has successfully conducted the “Eurostyle Monitor” and “Global Lifestyle Monitor,” which investigate a wide range of lifestyle issues related to clothing, shopping and textiles. This research has been important in adding value and increasing understanding of consumer attitudes and behaviors to CCI members around the globe.

The research looks in detail at lifestyles, clothing purchasing habits, and clothing interest and attitudes. Analysis of the results helps CCI understand:

- ✓ The issues behind cotton product demand,
- ✓ What motivates consumers to choose cotton over synthetics, and
- ✓ The implications of these issues for CCI’s strategy in promoting US cotton.

In 2006, Synovate was again selected to conduct and coordinate the Global Lifestyle Monitor research for Cotton Council International.

Overall Methodology

Interviewing

Market	Methodology
Brazil	Face to face: Sao Paulo, Rio de Janeiro, Belo Horizonte, Recife, Porto Alegre
China	Telephone: Beijing, Guangzhou, Shanghai
Colombia	Face to face: Bogota, Cali, Barranquilla, Medellin
Germany	Telephone: national
Thailand	Face to face: Bangkok, Chiangmai, Chonburi, Hadyai, Korat
India	Face to face: Mumbai, Delhi, Bangalore, Kolkata, Chennai
Italy	Telephone: national
Japan	Telephone: Tokyo, Osaka
United Kingdom	Telephone: national

NOTE: Korea and Taiwan were not included in the scope of the survey in 2003 or 2006.
 Hong Kong is also not included in the scope in 2006.
 Thailand is being surveyed for the first time in 2006.



Methodology – Colombia

Fieldwork in Colombia was conducted by Synovate from March 8th to March 29th, 2006. 500 respondents in total were surveyed via face-to-face interviewing in four cities: Bogota, Cali, Barranquilla, and Medellin.

The key respondent qualification requirement is that they purchase their own clothing. In order to maintain data consistency with the study conducted in 2003, we also set soft quotas by gender, targeting 250 males and 250 females. All respondents fall within the 15-54 age range.

This summary of results highlights major changes between the Global Monitor I conducted in 1999, Global Monitor II conducted in 2001, Global Monitor III conducted in 2003, and Global Monitor IV currently conducted in 2006.

Store Examples Used During Interviewing:

- Department stores (e.g., Éxito, Superley, Ley, La 14, Cafam, Tia, Vivero, SAO)
- Chain stores (e.g., Casa Estrella, Only, Iserra, Flamingo)
- Hypermarkets/Warehouse Clubs (e.g., Makro, Carrefour, Alkosto)
- Chain/Specialty shops outside of department stores (e.g., Benetton, Jeans & Jackets, Azucar)

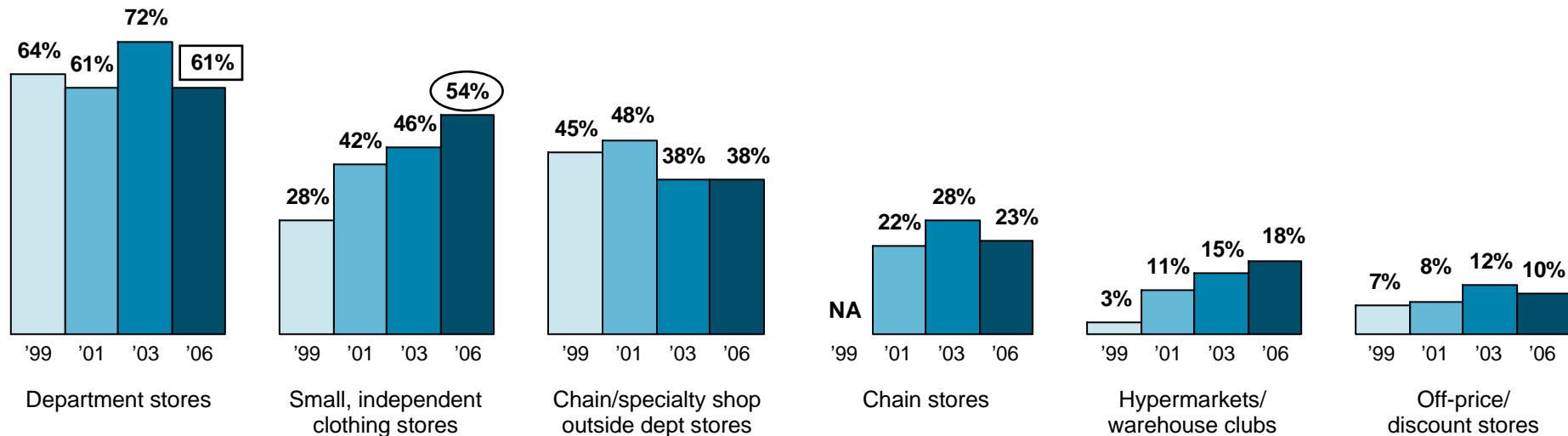
Base: Total Respondents: 1999 (n=500); 2001 (n=500); 2003 (n=500); 2006 (n=500)

Shopping and Fashion - Colombia

Shopping and Fashion - Colombia

A majority of Columbian shoppers continue to shop at department stores – despite a significant decline since 2003 – as well as at small, independent clothing stores, where there has been a significant increase in frequency of personal clothing purchases. Small stores have seen a steady increase and are challenging department stores for overall consumer preference in Colombia for the 3rd consecutive GLM survey.

Stores And Places Used To Buy Clothes For Yourself

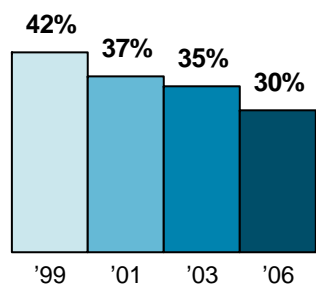


NA Not asked
 ○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

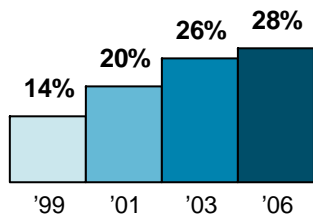
Shopping and Fashion - Colombia

Department stores continue to be the place consumers shop for most of their clothes, but by a gap that has narrowed from 42% - 14% in 1999 to just 30% - 28% in 2006 over small, independent clothing stores.

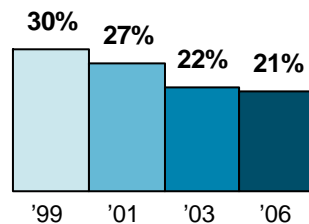
Stores and Places Used To Buy Most Of Your Clothes



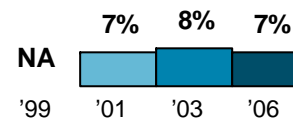
Department stores



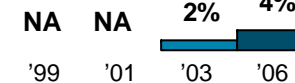
Small, independent clothing stores



Chain/specialty shop outside dept stores



Chain stores



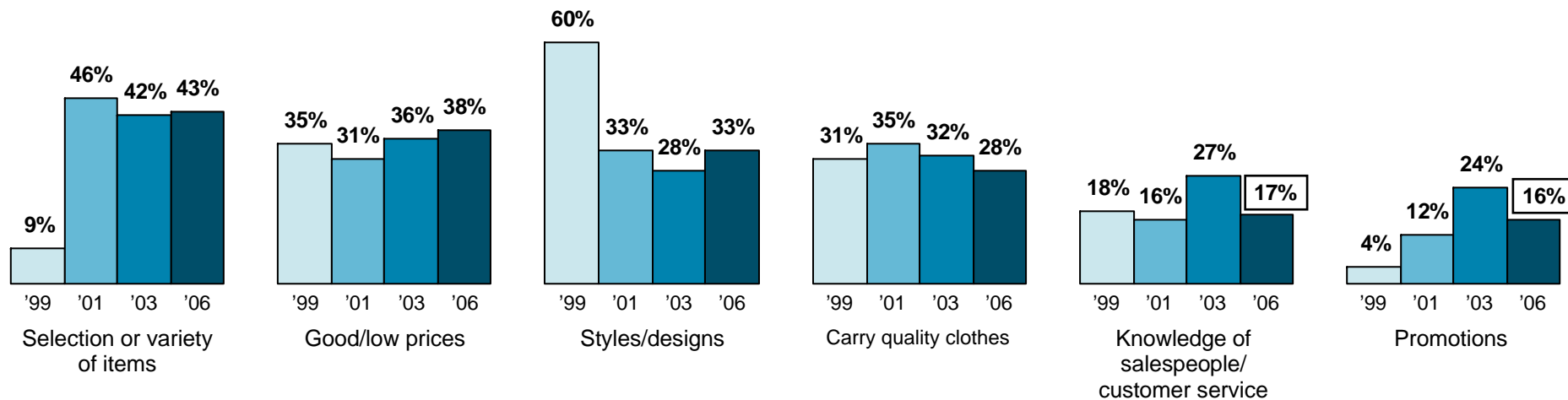
Hypermarkets/warehouse clubs

NA Not asked

Shopping and Fashion - Colombia

The selection and variety of items available continues to be the main reason for liking a particular clothing store. Good/low prices and styles/designs are also major considerations.

Clothing Store Attributes



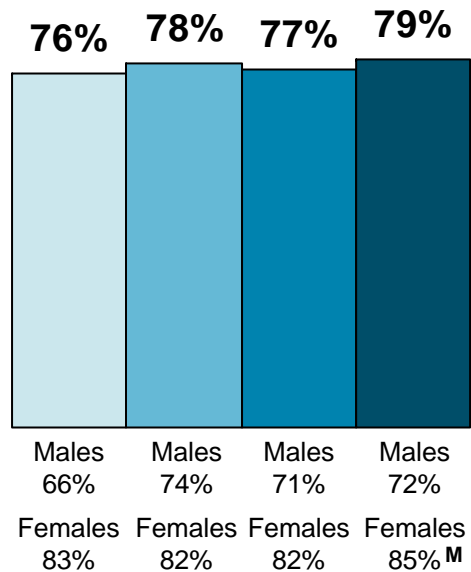
□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - Colombia

Colombians' attitudes toward shopping is relatively unchanged, with nearly 8-in-10 claiming to love/somewhat like shopping for clothes; 17% are ambivalent. Significantly more women than men love shopping.

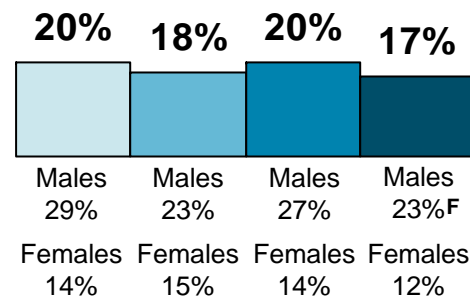
Love/Somewhat Like Clothes Shopping

1999 2001 2003 2006



Neither Like Nor Dislike

1999 2001 2003 2006

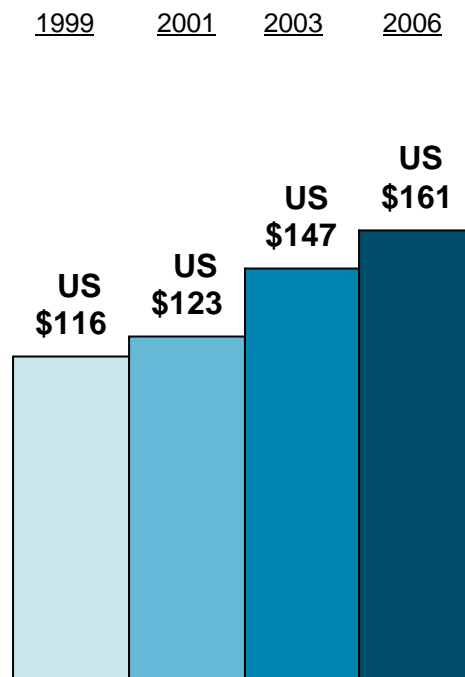


F Significantly greater than women at the 95% confidence level
M Significantly greater than men at the 95% confidence level

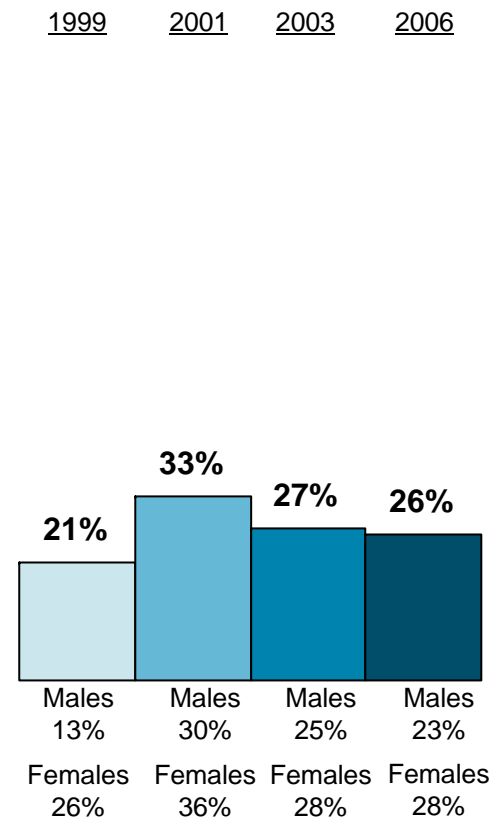
Shopping and Fashion - Colombia

Over a three month period, Colombian shoppers spent an equivalent of US\$161 on clothes for themselves, a figure that has risen for the 3rd consecutive GLM survey. A constant percentage of roughly 26% shop for clothes at least once a month.

Average Spent on Clothes In Past 3 Months



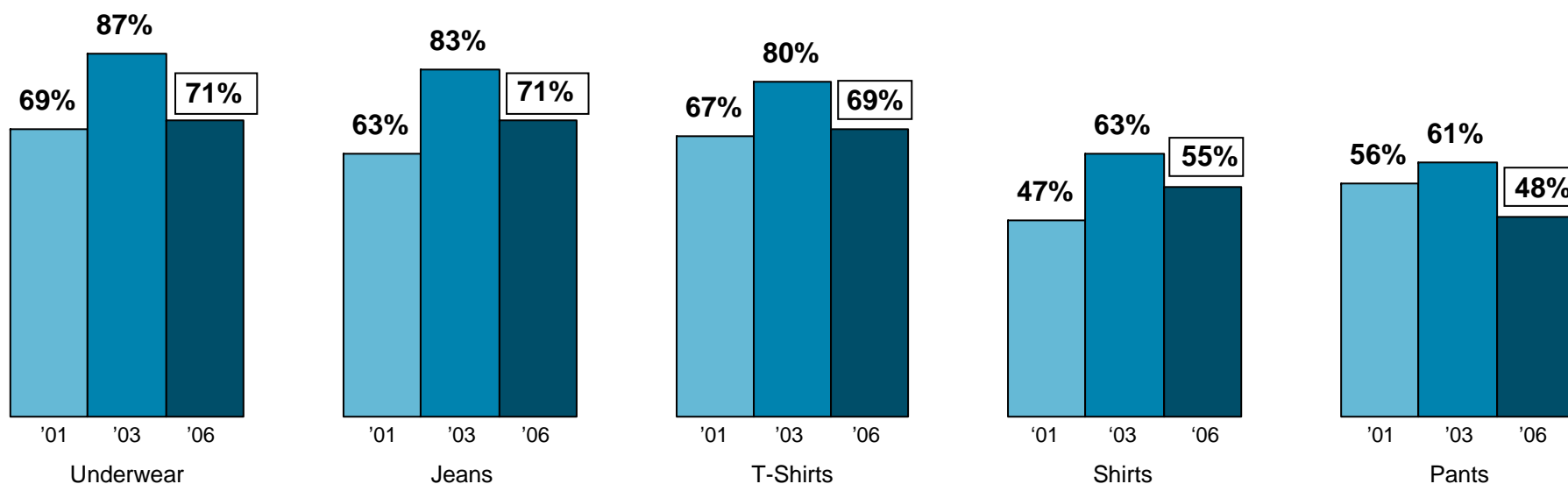
Buy Clothes At Least Once A Month



Shopping and Fashion - Colombia

In the past three months, a majority of shoppers have bought underwear, jeans, and t-shirts, but this represents a decline relative to the same period in 2003. There was a decline in each of the top categories compared to the 2003 results.

Top Items Purchased In Past Three Months*



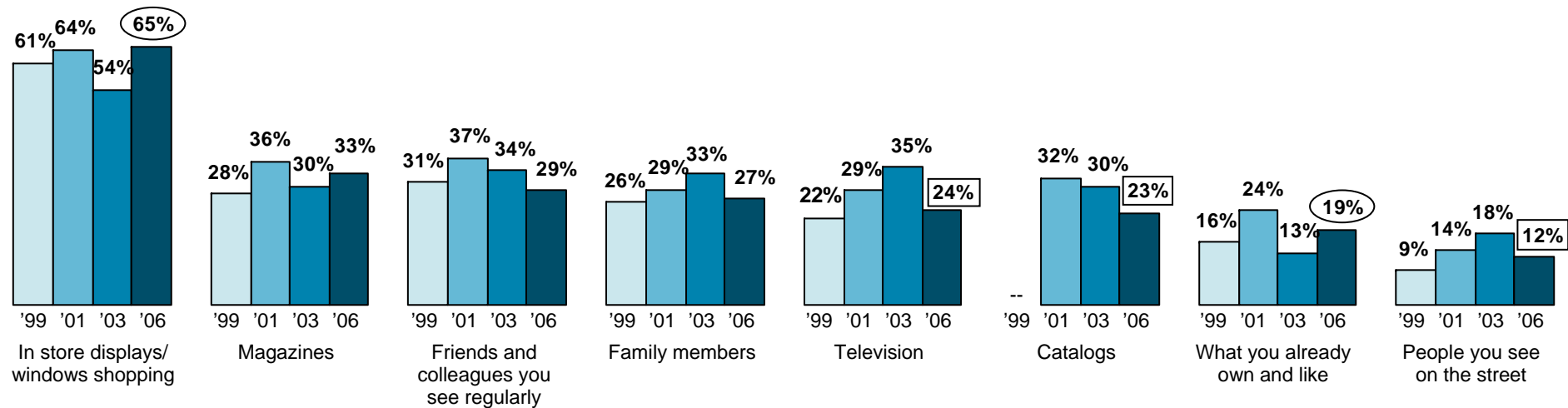
* Question not asked in GLM I - 1999

□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - Colombia

In-store display and magazines are the current leading sources for consumers to get ideas for their clothes. Significantly more are using in-store displays relative to 2003, and there is a decline in the percentage who are relying on television for their inspiration.

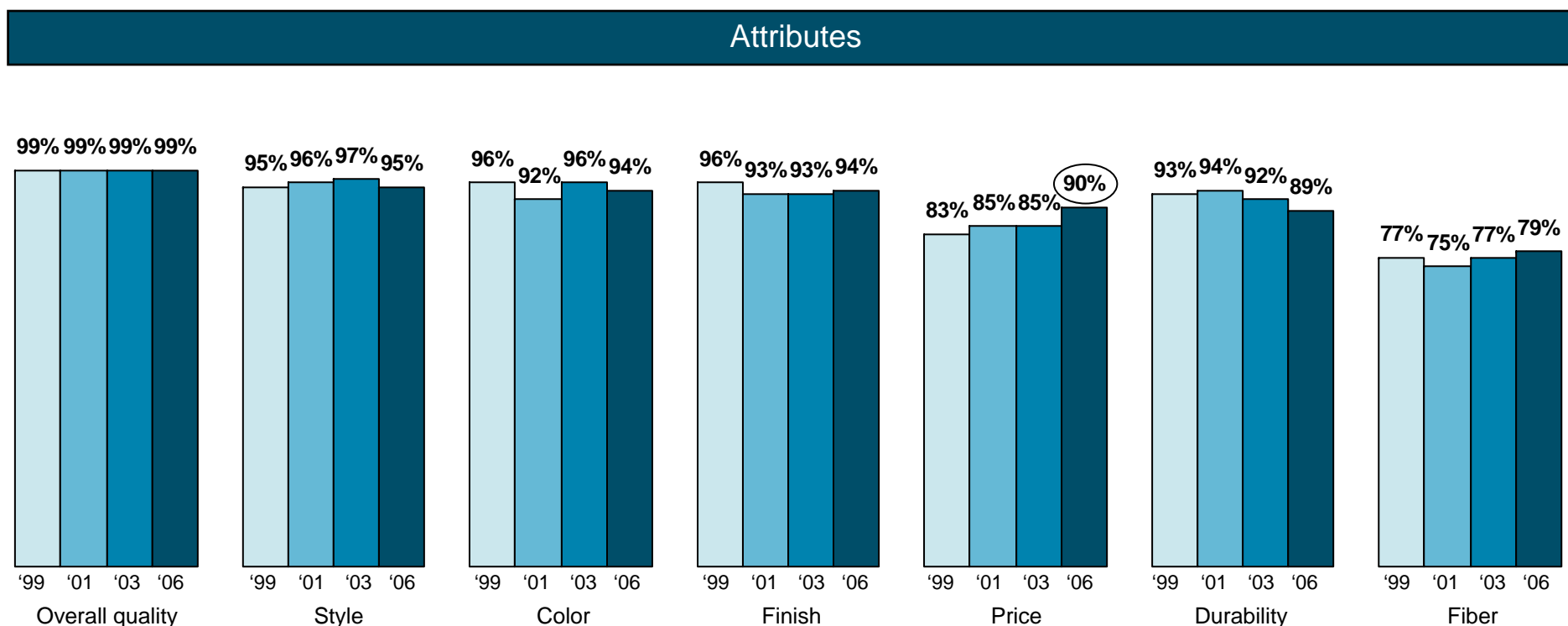
Place Where Consumers Get Ideas For Clothes



○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - Colombia

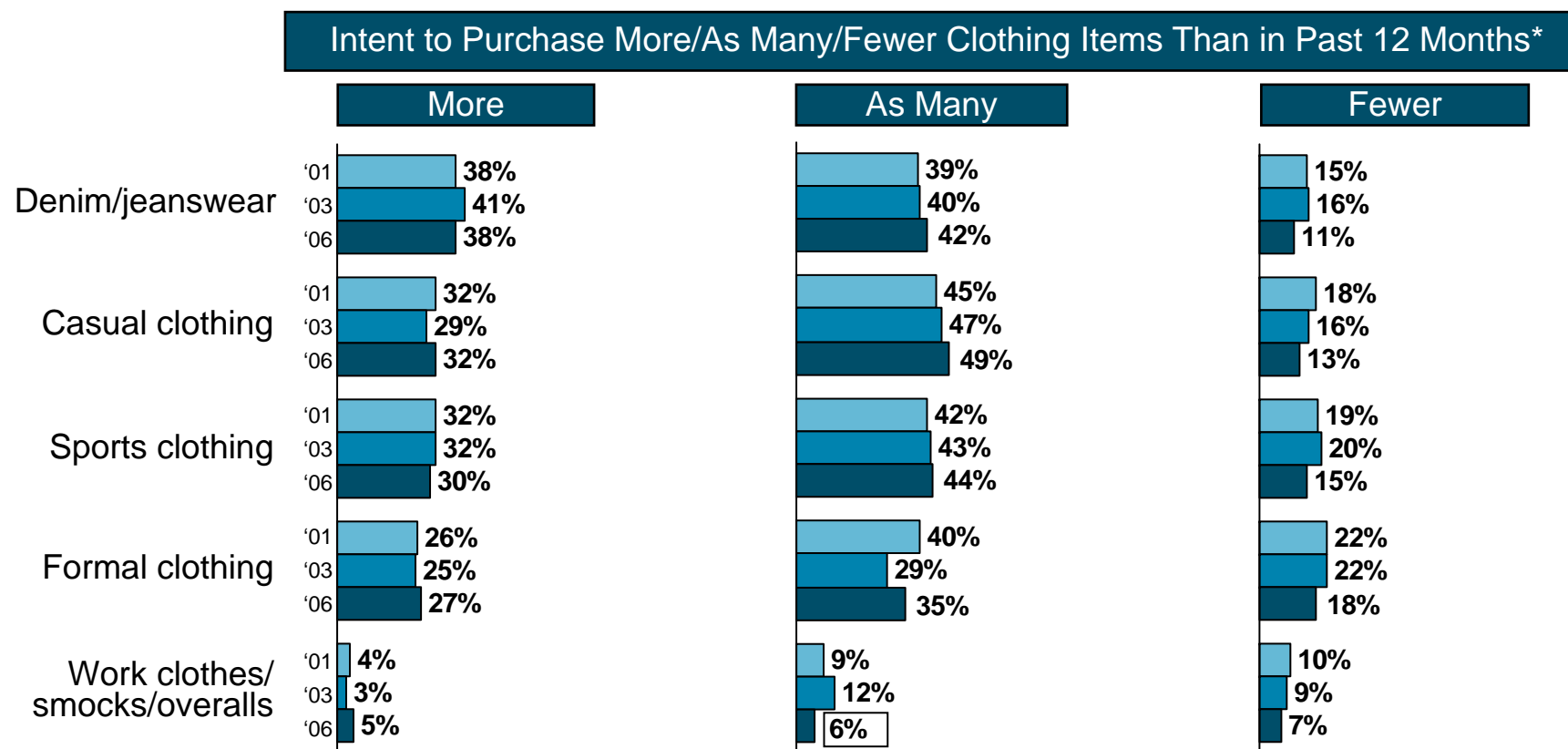
Similar to 2003, Colombians ranked each of the fabric attributes high in importance, with more than 90% citing that the overall quality, finish, durability, price, style, and color are major pieces of information to know prior to purchasing clothing. Fiber, despite a small increase, is ranked lowest.



□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - Colombia

Relative to the past 12 months, shoppers are likely to buy at least as many, if not more, of various types of clothing such as denim, casual clothing, and sports clothing in the future.

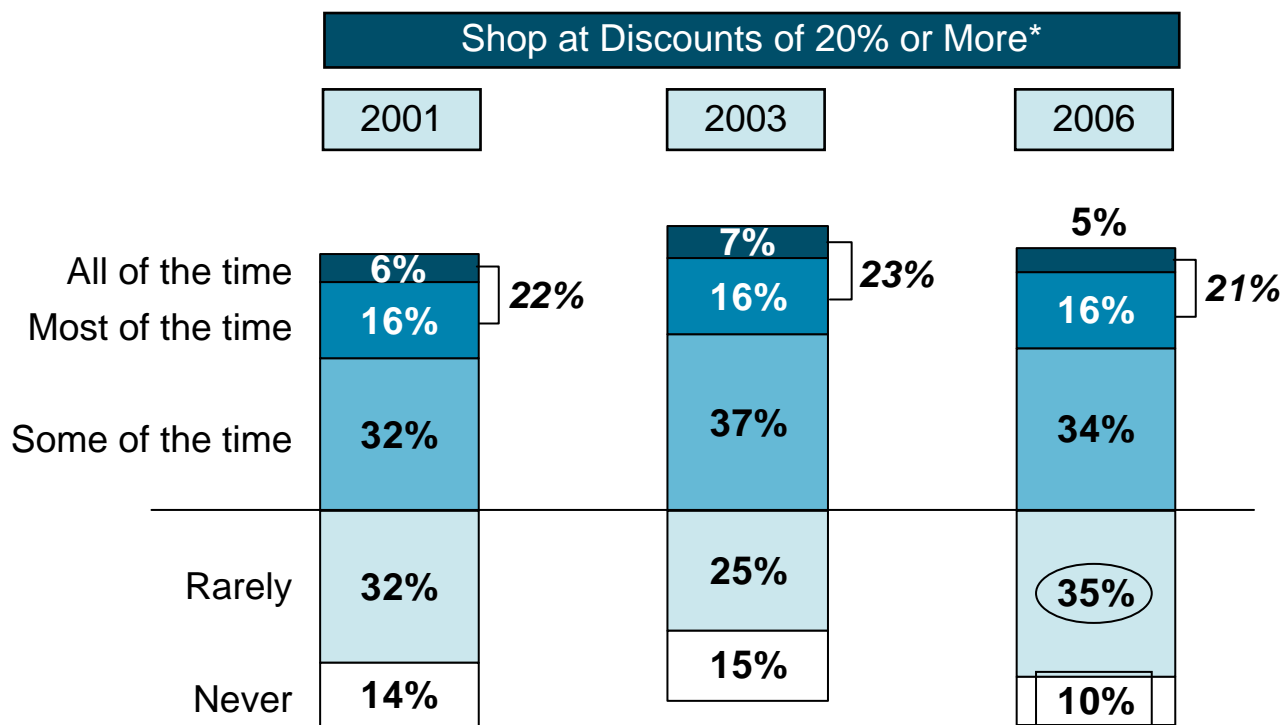


* Question not asked in GLM I - 1999

□ Significantly lower than GLM III at the 95% confidence level

Shopping and Fashion - Colombia

About 1-in-5 Colombian consumers buy clothes at a significant discount all or most of the time, in line with the 2004 results. Only 10% never do so. The majority (34%) buy clothing at discounts some of the time.



* Question not asked in GLM I - 1999

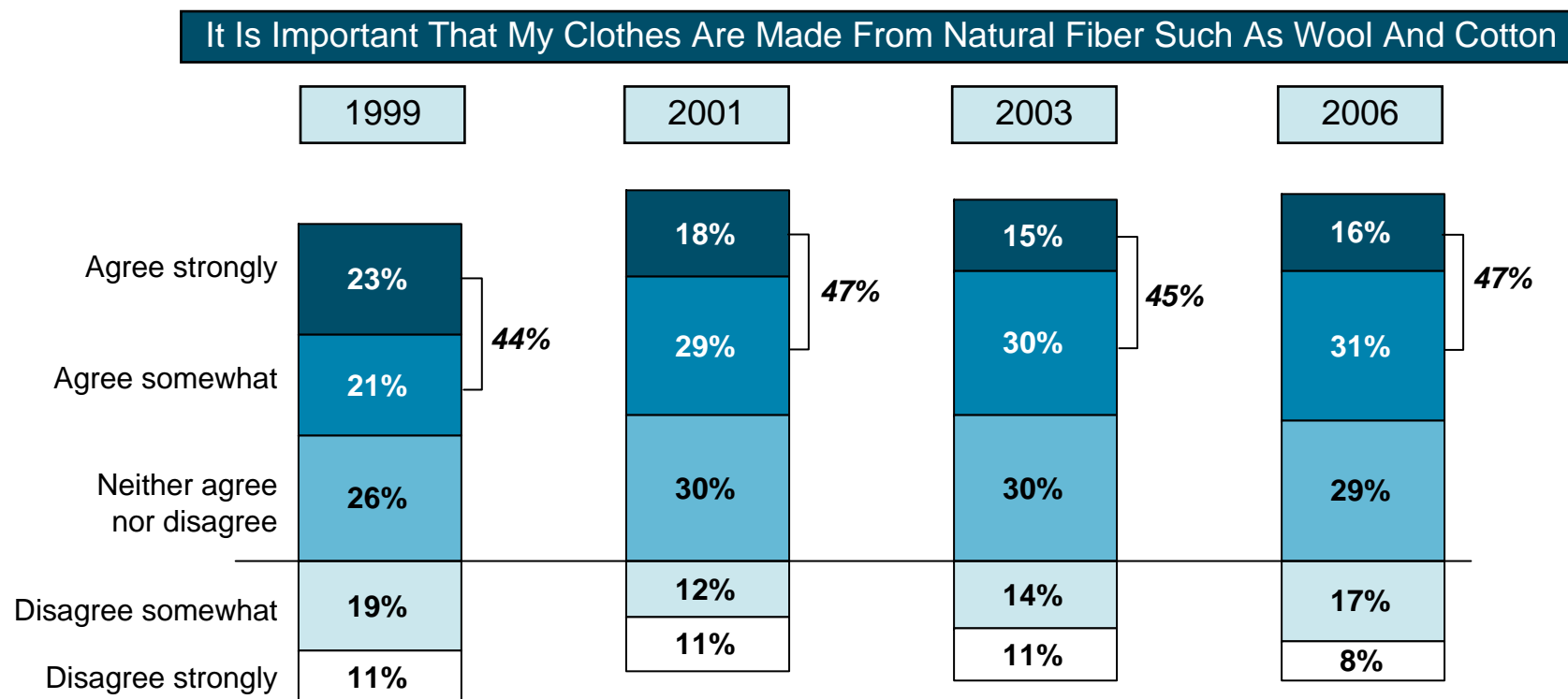
○ Significantly higher than GLM III at the 95% confidence level

□ Significantly lower than GLM III at the 95% confidence level

Quality and Fibers - Colombia

Quality and Fibers - Colombia

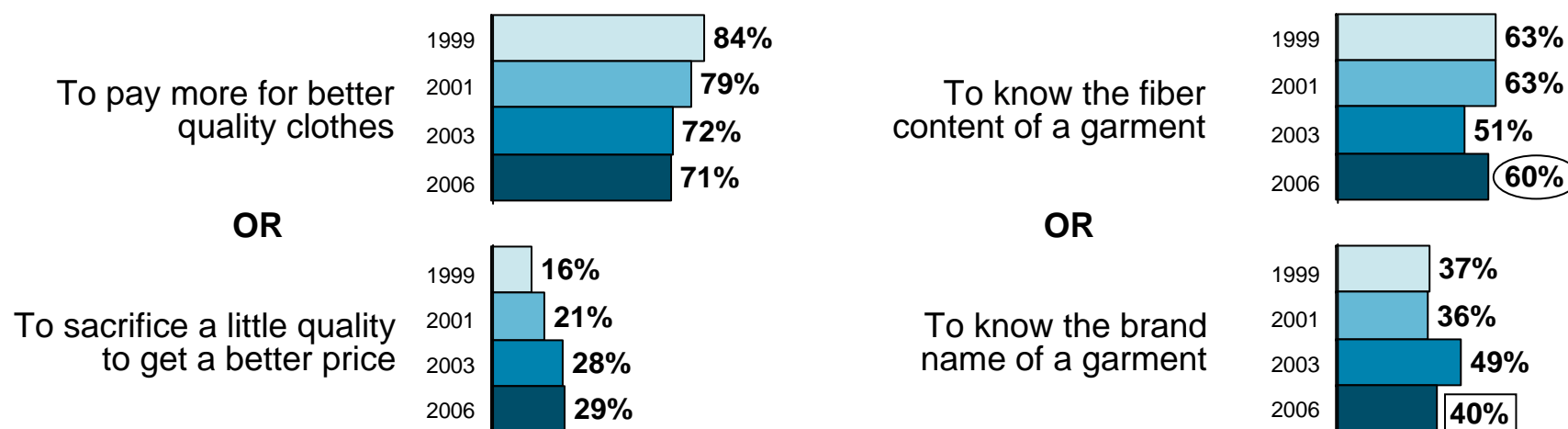
Within the Colombian marketplace there appears to be relatively little change in attitude toward the importance of natural fibers. Consistent with previous waves, nearly half of respondents in Colombia agree that it is important that clothes are made from natural fiber such as wool or cotton.



Quality and Fibers - Colombia

Opinions regarding fiber content versus brand name have significantly changed since 2003, with a larger numbers of respondents preferring to know the fiber content rather than the brand name. A consistent number of Colombians (71%) still prefer to pay more for quality rather than to sacrifice quality for price (29%).

Preferences

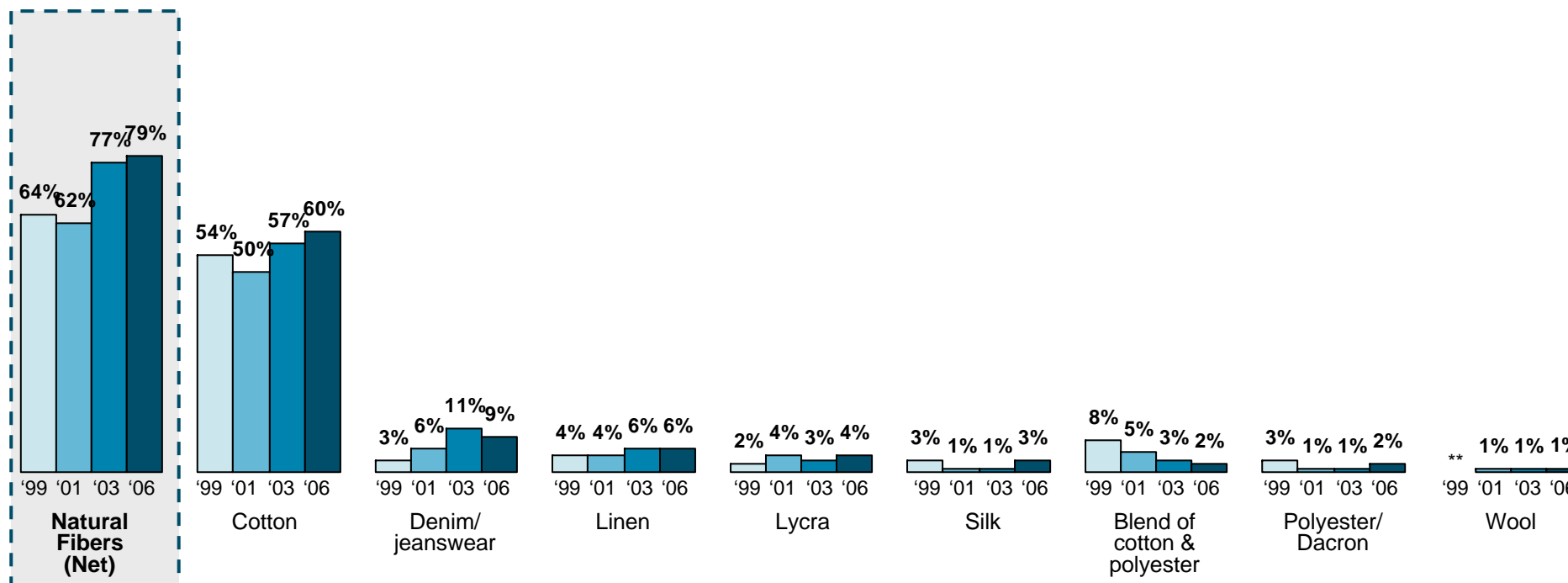


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Quality and Fibers - Colombia

Colombians state that natural fibers are best suited for today's fashions; cotton, which is rated slightly higher than it was in 2003, is seen as best.

Fiber Best Suited For Today's Fashions

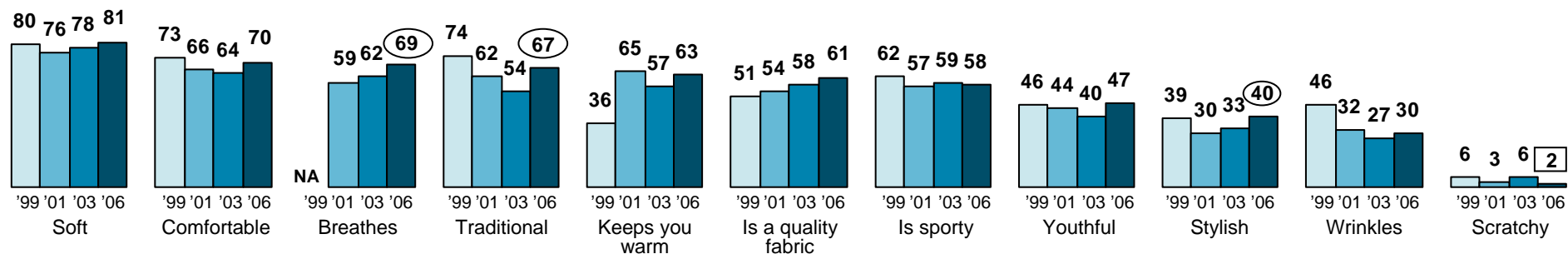


** Less than 0.5%

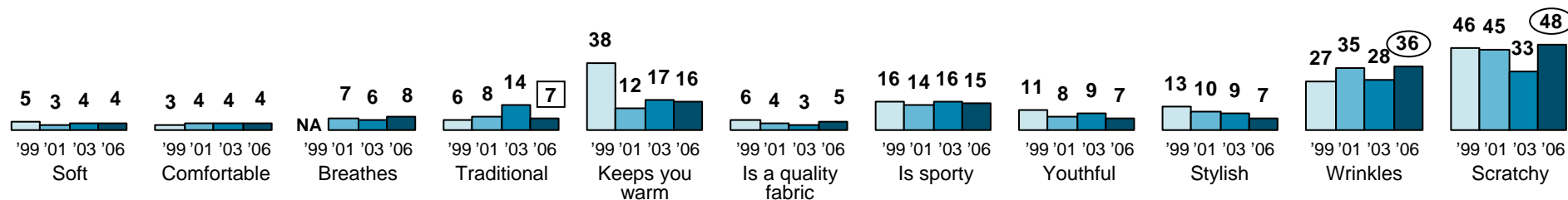
Quality and Fibers - Colombia

In comparison to polyester, cotton is ranked significantly higher in most important attributes. Being breathable and traditional are also highly associated with cotton and have significantly increased in association with cotton since 2003, led by being seen as soft and comfortable.

Attributes Describing Cotton %



Attributes Describing Polyester %

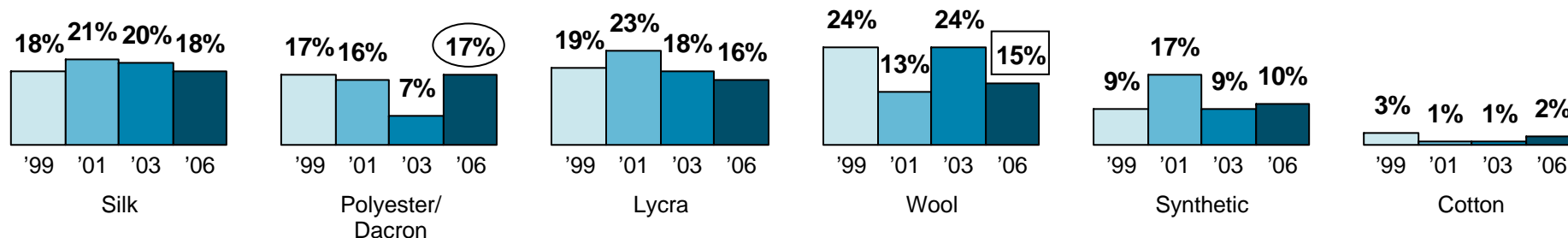


NA Not asked
 □ Significantly lower than GLM III at the 95% confidence level
 ○ Significantly higher than GLM III at the 95% confidence level

Quality and Fibers - Colombia

As indicated by the growing trend to take note of fiber content, more people say they avoid particular fibers such as polyester/Dacron. Silk (18%) is the fiber most avoided by Colombian consumers.

Fiber Avoided When Purchasing Clothing
(Among Those Who Said They Avoid Particular Fibers)



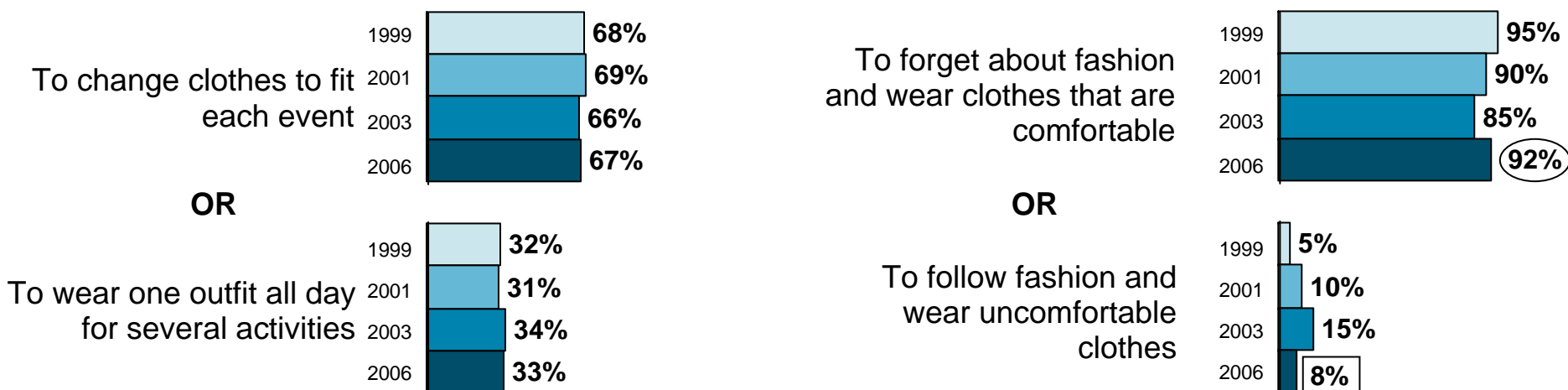
○ Significantly higher than GLM III at the 95% confidence level
□ Significantly lower than GLM III at the 95% confidence level

Casual Dressing - Colombia

Casual Dressing - Colombia

Two-thirds of shoppers prefer to change clothes throughout the day to fit each event, with only 33% choosing to wear one outfit for several activities. Comfort is still the preference, as well, with a significantly higher percentage of shoppers (92%) than in 2003 (85%) preferring to forget about fashion in favor of comfort.

Preferences

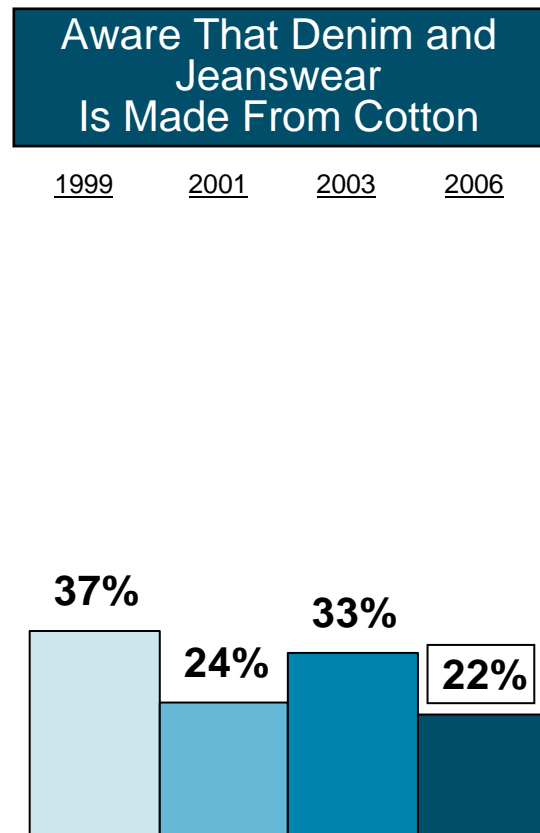


○ Significantly higher than GLM III at the 95% confidence level
 □ Significantly lower than GLM III at the 95% confidence level

Denim & Stretch - Colombia

Denim & Stretch - Colombia

The proportion of consumers who know which fiber denim/jeanswear is made from has decreased significantly, with less than 1-in-5 now aware that it is made from cotton.

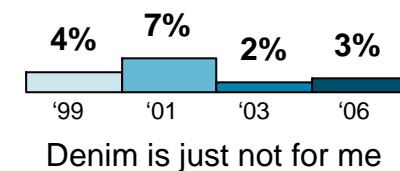
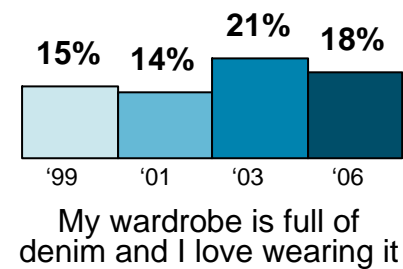
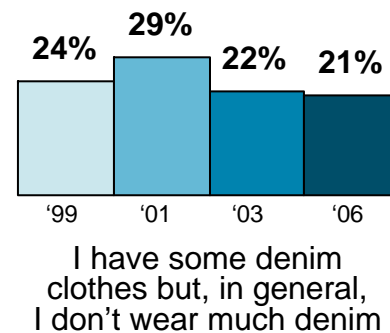
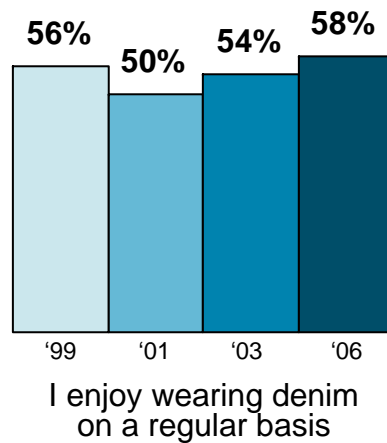


 Significantly lower than GLM III at the 95% confidence level

Denim & Stretch - Colombia

As in 2003, a majority of Colombians enjoy wearing denim on a regular basis, with a consistently small percentage of the population stating that denim is just not for them.

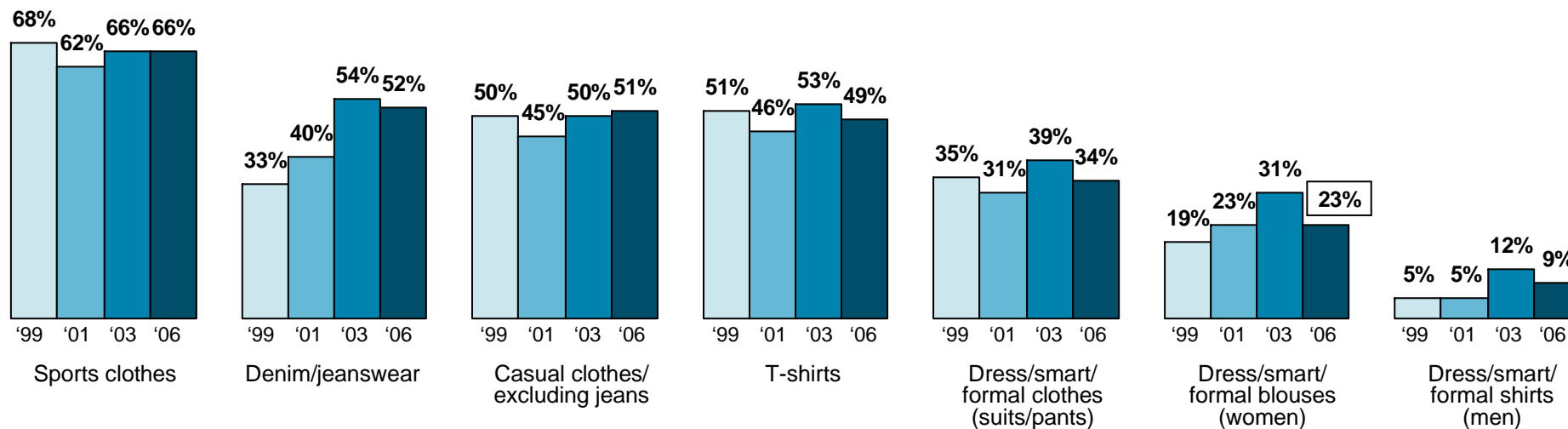
Attitudes Towards Denim/Jeans wear



Denim & Stretch - Colombia

Sports clothes and denim are the leading types of clothing that Colombians feel require stretch.

Think It's Important To Have *Stretch* or *Elastic Fabric* In Certain Types of Clothing



□ Significantly lower than GLM III at the 95% confidence level

Recommendations - Colombia



Recommendations - Colombia

Colombians have gradually increased their spending on clothing over the past 7 years from a 3 month average of \$116 in 1999 to \$161 in 2006. They have a low percentage who look at the label before purchasing to check fiber content. An increasing percentage of clothes shoppers in Colombia are also avoiding polyester.

This leads to a recommendation that is based on fiber education above all.

- Purchase intent for the future is static but there is an increased percentage who are currently purchasing casual clothing. Therefore, targeting a campaign geared towards the casual clothing market is recommended.
- Targeting small, independent stores can be beneficial considering these store types are increasing in importance and department stores are decreasing in importance.
- Touting the benefits of cotton, such as keeping cool, should be a key ingredient in the marketing program considering they have the lowest percentage who agree that cotton keeps you cool (certainly a key benefit of the fiber)