

L I F E S T Y L E
monitor

A weekly update on consumer attitudes and behavior based on ongoing research from Cotton Incorporated

SMART FASHION

Today's Female Consumers Shop Intelligently for Fall

Cassie, a thirty-five year old attorney from Manhattan and a self-professed "summer girl," is always sorry to say goodbye to long days and warm nights. "Typically, I look to shopping for fall clothing as the silver lining in that cloud," she admits, but adds that as a result of the current economy, her silver lining this year is a little less radiant. "I am just going to buy a few pieces, and try to extend what I already have in my closet," she says.

Cassie is one of many women who embody this season's defining trend: "fashion smart". Melissa Bastos, Manager of Market Research, Cotton Incorporated, says that fashion smart women will first shop their own closets, evaluating what they already own and adding from there. "Women are thinking more carefully these days, and that thought process starts before they even begin shopping," Bastos says.

According to the Cotton Incorporated *Lifestyle Monitor*™ survey, 47% of female respondents say that they will purchase new clothing for fall, while 53% say that they will be wearing what they already own.

"Clearly there are women who will be shopping, but what we have seen is an overall hesitation and a tendency to plan more," says Bastos. "When shopping, women will be replacing the basics and shopping on sale."

Monitor data support this; among women planning to purchase apparel for themselves this fall, 85% say they are doing so to replace basic items, and 15% say they are doing so to add the latest styles to their wardrobes. "When shopping for the basics, women will be looking for value and quality," adds Bastos.

Apparently, most women will find that quality and value in the sale rack; 62% of female respondents planning to shop for apparel this fall say that they are somewhat to very likely to buy their clothing on sale this year versus last year, according to the *Monitor* survey.

"Women are definitely calculating their purchases and are waiting for a sale," says Michael Londrigan, Chair of Fashion Merchandising at LIM (Laboratory Institute of Merchandising) College. "Price is driving them and they will wait, even if it means compromising on size and color assortment."

Londrigan agrees that fashion's biggest trend this year is repurposing current wardrobe items and mixing things up to achieve a new look. "I think that fall 2009 is about creativity and talent," Londrigan says.

The good news for women looking to wear the latest and greatest is that trends of the last several seasons are still very much in vogue, like tailored garments, ruffles, capes, denim, plaid and smart embellishments. The fashion smart woman will leverage these trends to create a look all her own.

Just a few carefully edited pieces will provide that

newness consumers look for in the fall, says Abby Yemm, Managing Editor for ChicagoPicks.com, an online style guide. "There's no reason to break the bank; it's all about moderation and selecting items that will last through the season," she says.

Topping that short list is denim. "My best friend came back from Paris, where the boyfriend jean is dominant," Yemm says. "I think it's safe to say we'll continue to see this trend through the fall." She adds that the skinny jean is another trendy silhouette for fall.

Will Redgate, Brand Director for DL1961, a denim line, advises consumers to update their denim with color. "This season's must-have in denim is gray," Redgate says. "Gray denim, especially in a slim and straight leg, is a continuous trend that is going to bring us well into fall."

Budget-conscious women should also turn to classic looks like plaid, which transcends seasons. "Plaid stands out through fall and comes back in waisted skirts and oversized boyfriend shirts," says Andrea Hamilton, Brand Manager for Mink Pink.

Plaid offers longevity, says Elizabeth Schnuelle, Director of Sales for Civil Smith, a new line launching this fall. "From our plaid shirts to skinny denim, consumers are going for wearable Americana style that can transition them from fall into the holiday season."

On the other hand, managing editor Yemm says women can also look to the past to update their wardrobes. "Think 80's: big shoulders, floral patterns and neon colors," Yemm says. "It's Betsey Johnson meets Lady Gaga, in a more toned down and demure manner. Perhaps due to challenging economic times,

people are looking for little bursts of happiness wherever they can find them. There is definitely a celebratory spirit happening with such fun, super-short hemlines and candy-colored tights and chunky sky-high heeled boots."

"Fall 2009 is definitely about mixing things up," says Hamilton. "Mink Pink infuses the collections with our signature ditzzy floral prints to lighten things up, especially when mixed with some of our edgier pieces." She also adds that carefully

placed embellishments, like exposed zippers and gunmetal sequins, can update classic pieces.

Enhancing what one already owns with selective interpretation of the latest trends is a smart message for fashion mavens everywhere this fall – and beyond.

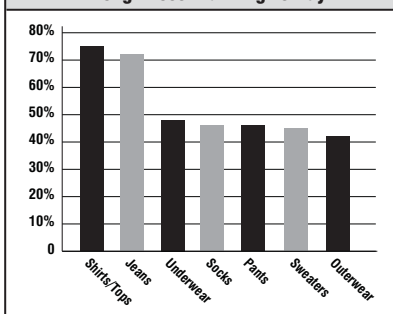
This story is one in a series of articles based on findings from Cotton Incorporated's Lifestyle Monitor™ tracking research. Appearing Thursdays in these pages, each story will focus on a specific topic as it relates to the American consumer and her attitudes and behavior regarding clothing, appearance, fashion, fiber selection and many other timely, relevant subjects.



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— Abby Yemm, ChicagoPicks.com

Items Women Are Most Likely To Purchase For Themselves This Fall, Among Those Planning To Buy



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WWD THURSDAY
 Sportswear/Men's



FASHION

4 Polo Ralph Lauren's designer men's collections for spring are as vast and comprehensive as ever, showcasing Ralph Lauren's sense of the good life.

GENERAL

1 Liz Claiborne Inc. posted a second-quarter loss of \$82.1 million versus a loss of \$23.2 million, as sales fell 29 percent to \$683.8 million.

3 Costs from dropping divisions and the My Macy's program and the economy caused Macy's Inc. second-quarter profits and sales to fall.

6 MEN'S: Success Apparel is launching the DCoated brand in the young men's market for spring, following its introduction in boys' for fall.

7 DENIM: Reiss, one of the U.K.'s most upscale brands, is taking a more relaxed direction this fall with its new denim line, Reiss 1971.

8 Textile and apparel imports to the U.S. in June fell for the sixth straight month, with Vietnam showing the only significant increase in shipments.

10 BEAT: After 10 years, Shawn "Jay-Z" Carter's mission for Rocawear, along with parent Iconix Brand Group, is to make it a \$1 billion business.

14 Maidenform Brands reported a less-than-expected decline in second-quarter profits and raised full-year guidance, boosting shares 7 percent.

EYE

16 Talking with author Maile Meloy, whose new book, "Both Ways Is the Only Way I Want It," contains 11 concise and quietly affecting stories.

Classified Advertisements.....15

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DAILY QUOTE "This year I don't think [price promotions] will be driven by ceo's of the big retailers looking at their balance sheet and looking at what their orders are. This year is going to be about making money out of perishable inventory. It's going to be about competing with each other."

— William L. McComb, chief executive of Liz Claiborne Inc. Page one.

TODAY ON **WWD.COM**



Looks from Ralph Lauren Label's spring line.

- Additional photos of Ralph Lauren's men's collections for spring
- More looks from the Robert Geller-Levi's collaboration
- WWD Blogs: A rock photographer reminisces about his work at Woodstock and Debi Mazer's missed Woodstock trip
- Global breaking news

PHOTO BY JOHN AQUINO