Spotlight on the Street Markets and Online Shopping: Tap into a ready consumer base for online and mobile shopping by offering the price, selection, and ease of shopping consumers seek.

APPAREL SPENDING

Consumers in Thailand spent $10.2 billion on clothing in 2018, marking a third year of growth since experiencing a downturn in 2008. This steady progress is expected to continue for an 81% growth in the apparel market by 2030. Pair optimized digital platforms with price-conscious casual clothing to reach this robust consumer market.

GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: THAILAND

THAILAND $10.2
+81% growth

US $338.9
+56% growth

EU $374.5
+52% growth

CHINA $277.2
+193% growth

How They Shop: Inspire an increasingly connected consumer base with engaging mobile platforms and window displays for the impulse shopper.

What They Shop: Offer cotton-rich clothing made for comfort in casual designs to meet the needs of active Thai consumers.

KEY TRENDS

FINANCIAL OUTLOOK

OPTIMISTIC

Thailand 43% Global 56%

PESSIMISTIC

Thailand 4% Global 11%

*Neither Optimistic/Pessimistic not shown

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Thai consumers enjoy shopping for clothing (69%) both online and in-store. Though just 41% of the population uses the internet regularly (at least once per week), 59% of consumers have shopped for clothing online. Digital purchases are expected to grow to 37% of all consumer spending by 2022, with particularly strong growth in mobile shopping. While many browse online, Thai consumers are more likely to frequent street markets and small, independent stores.

**SHOPPING JOURNEY**
Consumers who prefer shopping in-store vs. online

- 67% clothing research (in-store)
- 81% pre-purchase questions (online)
- 90% purchase (in-store)
- 88% repeat purchase (online)

**RETAIL STORES SHOPPED FOR CLOTHING**
- STREET MARKETS 84%
- HYPERMARKETS 62%
- DEPARTMENT STORES 38%
- INDEPENDENT STORES 32%
- ONLINE ONLY 12%

**APPAREL SHOPPING HABITS**
Buying Clothes on Impulse

- 70% in 2008
- 70% in 2010
- 62% in 2012
- 77% in 2014
- 68% in 2016
- 77% in 2018

**SOURCES FOR CLOTHING IDEAS**

- Other People 77%
- Window Shopping 51%
- Traditional Media 37%
- Social Media 22%
- Store Publications 15%
- Brand & Retailer Digital Resources 14%

33% Shop online at least once per month.
WHAT THEY SHOP

Thai consumers prefer casual clothing that provides comfort, fit, durability, and quality. They own an average of 14 T-shirts and 8 casual slacks compared to fewer dress shirts (5), dress pants (2), or skirts (4). Emphasizing comfort, nine in ten consumers (89%) say their most-worn clothing is made of cotton and a similar proportion (86%) say cotton-rich fabrics are best suited for today’s fashions. Meet Thai consumers’ needs with high quality, comfortable casual wear that moves with them throughout their days.

TOP ITEMS OWNED

<table>
<thead>
<tr>
<th>Item</th>
<th>Average Number Owned</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-shirts</td>
<td>14</td>
</tr>
<tr>
<td>Bras</td>
<td>10</td>
</tr>
<tr>
<td>Casual Pants</td>
<td>8</td>
</tr>
<tr>
<td>Casual Shirts</td>
<td>5</td>
</tr>
</tbody>
</table>

COTTON AS PREFERRED FIBER

- BABYWEAR: 86%
- PANTS & JEANS: 82%
- SHIRTS: 79%
- HOME TEXTILES: 79%
- INTIMATES: 72%

PRIMARY PURCHASE DRIVERS

- Comfort: 95%
- Fit: 94%
- Durability: 93%
- Quality: 92%

PAY MORE FOR BETTER QUALITY

- 2008: 41%
- 2010: 49%
- 2012: 49%
- 2014: 57%
- 2016: 40%
- 2018: 60%

PERFORMANCE APPAREL

- 41% Regulate Body Temperature
- 39% Relieve Stress
- 34% Illuminate When Needed
- 32% Manage Mood/Emotions
- 31% Monitor Perspiration

INFO: MARKETINFORMATION@COTTONINC.COM  LIFESTYLEMONITOR.COTTONINC.COM  ©2018
Street markets are a staple of the Thai economy and culture and a popular destination for shopping, as 84% of consumers use them to shop for clothes and nearly two in three (62%) buy most of their clothes at these venues. At the same time, online shopping is rapidly growing in Thailand, particularly on mobile devices. The features sought by street market shoppers - price, selection, and convenience – are the same that draw global consumers to online marketplaces. Build on this growing digital market by reaching out to a ready consumer base looking for affordable clothing in a wide variety with an easy retail process.

### GROWTH OF MOBILE SHOPPING

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage of Online Purchases Completed on Mobile Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>27%</td>
</tr>
<tr>
<td>2016</td>
<td>45%</td>
</tr>
<tr>
<td>2018</td>
<td>54%</td>
</tr>
<tr>
<td>2020</td>
<td>58%</td>
</tr>
<tr>
<td>2022</td>
<td>projected</td>
</tr>
</tbody>
</table>

### BARRIERS TO ONLINE SHOPPING

- **Uncertainty About Product**: 74%
- **Lack of Trust**: 50%
- **Concern About Experience**: 37%
- **Unfamiliarity**: 30%
- **Access**: 23%

### LIKE MOST ABOUT STREET MARKETS

- **Price**: 84%
- **Selection**: 68%
- **Convenient Location**: 63%
- **Ease of Shopping**: 57%

### LIKE MOST ABOUT ONLINE ONLY STORES (Global)

- **Price**: 34%
- **Selection**: 19%
- **Ease of Shopping**: 18%
- **Clothing Quality**: 7%

**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: Euromonitor International