



GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: THAILAND

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.



KEY TRENDS



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.

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.

FINANCIAL OUTLOOK



OPTIMISTIC

Thailand	Global
43%	56%

PESSIMISTIC



Thailand	Global
4%	11%

*"Neither Optimistic/Pessimistic" not shown

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HOW THEY SHOP

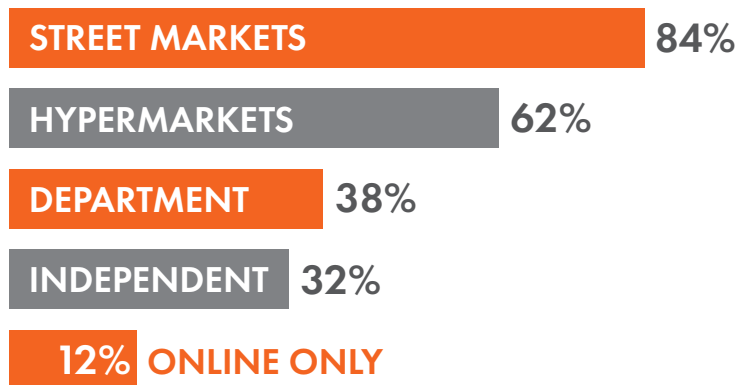
Thai consumers enjoy shopping for clothing (69%) both online and in-store. Though just 41% of the population uses the internet regularly (at least once per week)¹, 59% of consumers have shopped for clothing online. Digital purchases are expected to grow to 37% of all consumer spending by 2022, with particularly 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



RETAIL STORES SHOPPED FOR CLOTHING

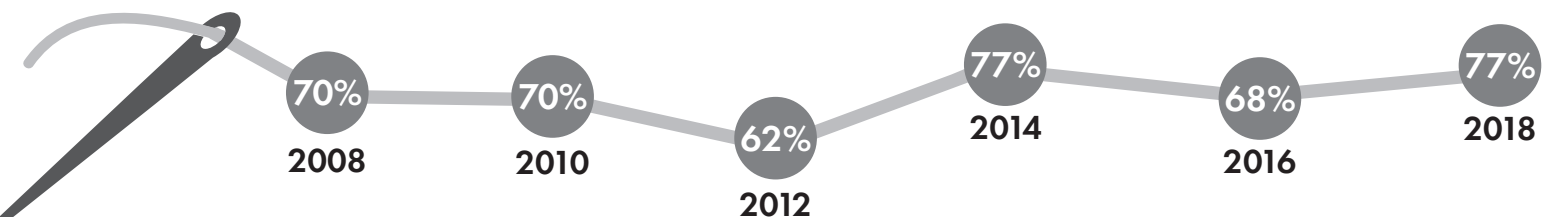


33%

Shop online at least once per month.

APPAREL SHOPPING HABITS

Buying Clothes on Impulse



SOURCES FOR CLOTHING IDEAS



Other People
77%



Window Shopping
51%



Traditional Media
37%



Social Media
22%



Store Publications
15%

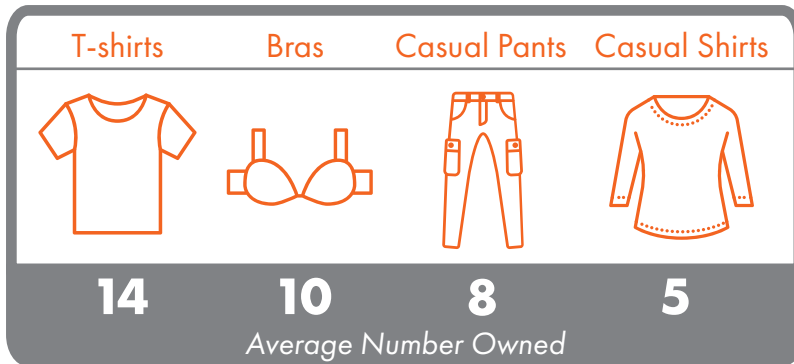


Brand & Retailer Digital Resources
14%

WHAT THEY SHOP

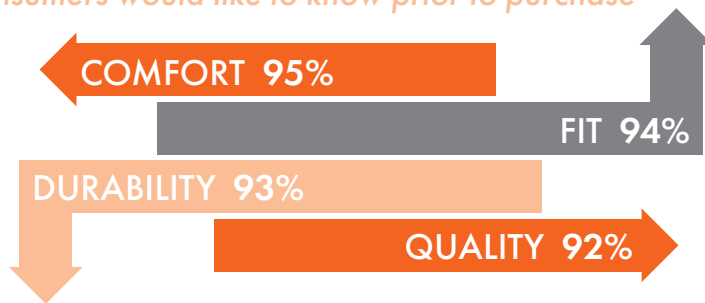
Thai consumers prefer casual clothing that provides comfort, fit, durability, and quality. They own an average of 14 T-shirts and 8 casual slacks compared to fewer dress shirts (5), dress pants (2), or skirts (4). Emphasizing comfort, nine in ten consumers (89%) say their most-worn clothing is made of 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



PRIMARY PURCHASE DRIVERS

Consumers would like to know prior to purchase



COTTON AS PREFERRED FIBER

 **BABYWEAR 86%**

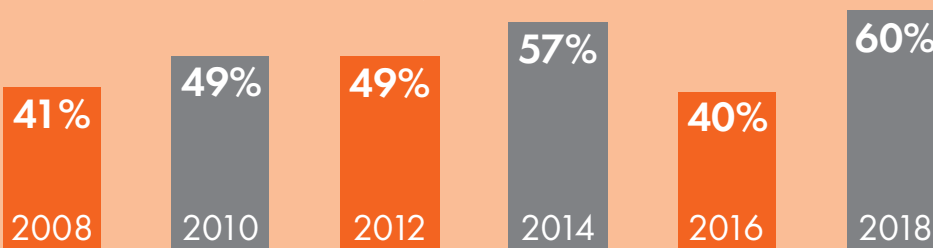
 **PANTS & JEANS 82%**

 **SHIRTS 79%**

 **HOME TEXTILES 79%**

 **INTIMATES 72%**

PAY MORE FOR BETTER QUALITY

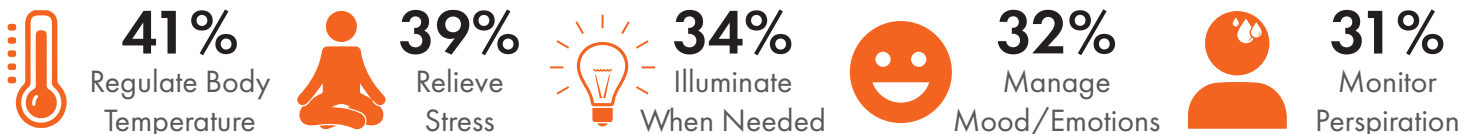


89%

prefer cotton or cotton blends for their most-worn clothing

PERFORMANCE APPAREL

Likely to Purchase



SPOTLIGHT

STREET MARKETS & ONLINE SHOPPING

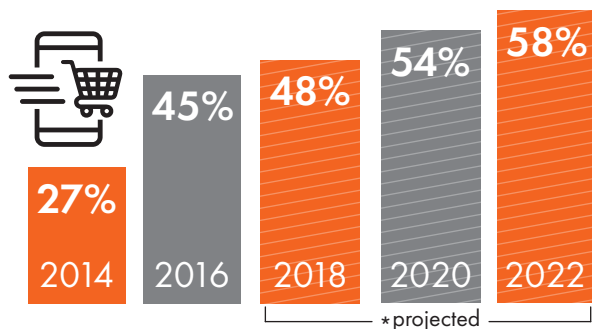
PERCENTAGE EVER SHOPPED ONLINE



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.

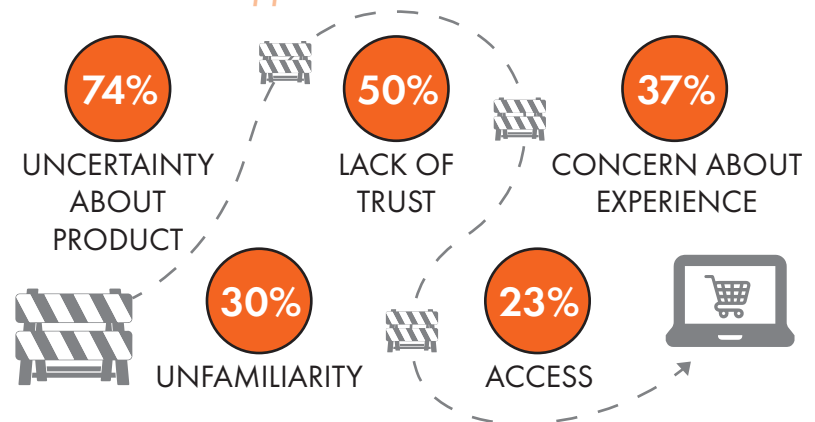
GROWTH OF MOBILE SHOPPING¹

Percentage of Online Purchases Completed on Mobile Device

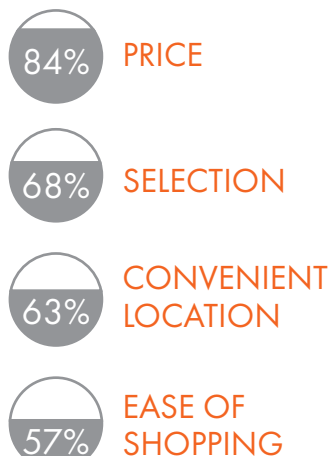


BARRIERS TO ONLINE SHOPPING

Street Market Shoppers



LIKE MOST ABOUT STREET MARKETS



LIKE MOST ABOUT ONLINE ONLY STORES (Global)



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

