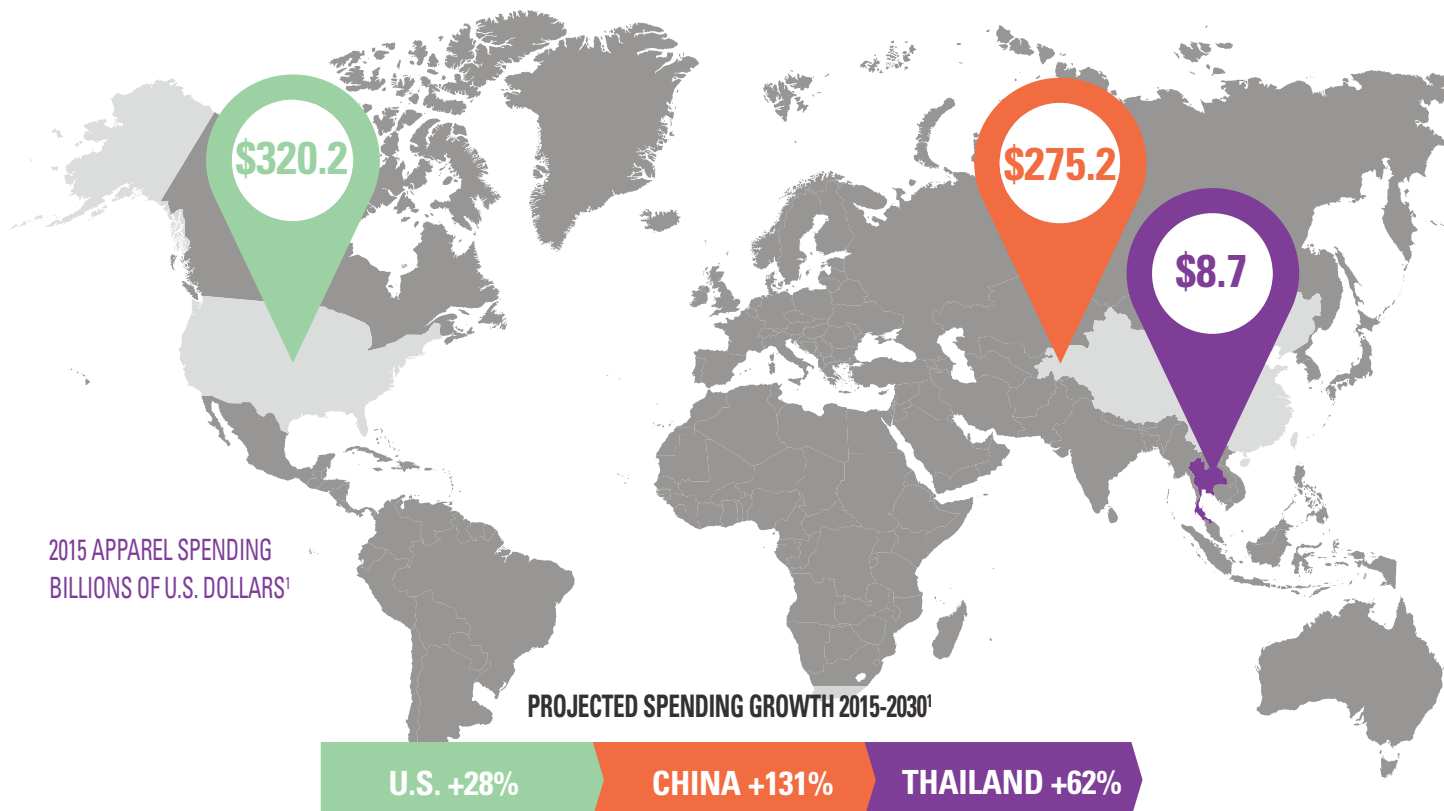


GLOBAL CONSUMER INSIGHTS

GLOBAL LIFESTYLE MONITOR: THAILAND



APPAREL SPENDING



KEY TRENDS



SPENDING

Apparel spending in Thailand is projected to grow more than 60% over the next 15 years.



SHOPPING

Winning customer loyalty will require strong word-of-mouth and social media campaigns as these remain top sources of clothing inspiration.



OMNICHANNEL

To draw traffic to their own webpages, brands need to provide the detailed product information Thai consumers seek when shopping online.



SUSTAINABILITY

Opportunities exist to market cotton products as meeting Thai shoppers' functional, emotional, and sustainable needs to make cotton more competitive with manmade fiber products.

GLOBAL LIFESTYLE MONITOR: THAILAND

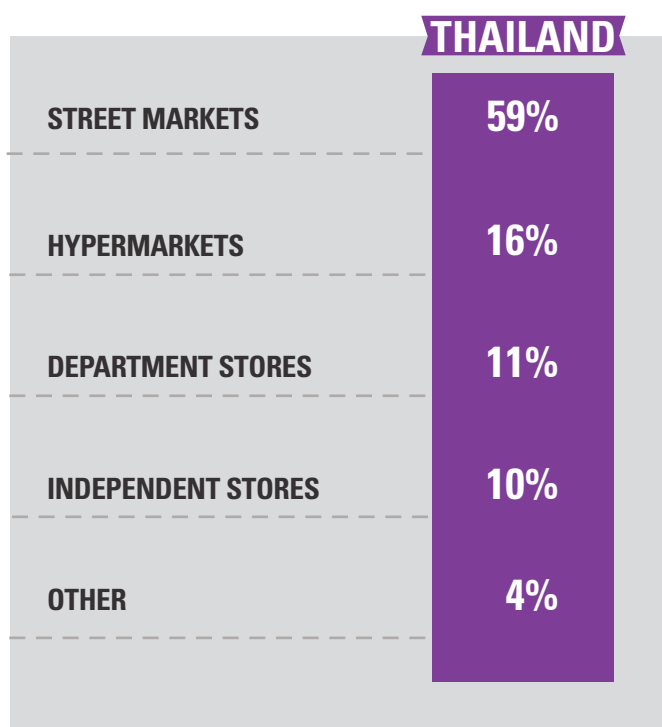
APPAREL SHOPPING ATTITUDES & HABITS

Although Thailand's apparel market is projected to grow over 60% in the coming 15 years, it remains underdeveloped. Almost 7 in 10 Thai consumers shop for most of their apparel at unorganized outlets such as street markets and independent stores. Winning customer loyalty in Thailand will require strong word-of-mouth campaigns as friends, family, and, among those who get clothing ideas online, social media are top sources of clothing inspiration in the market.

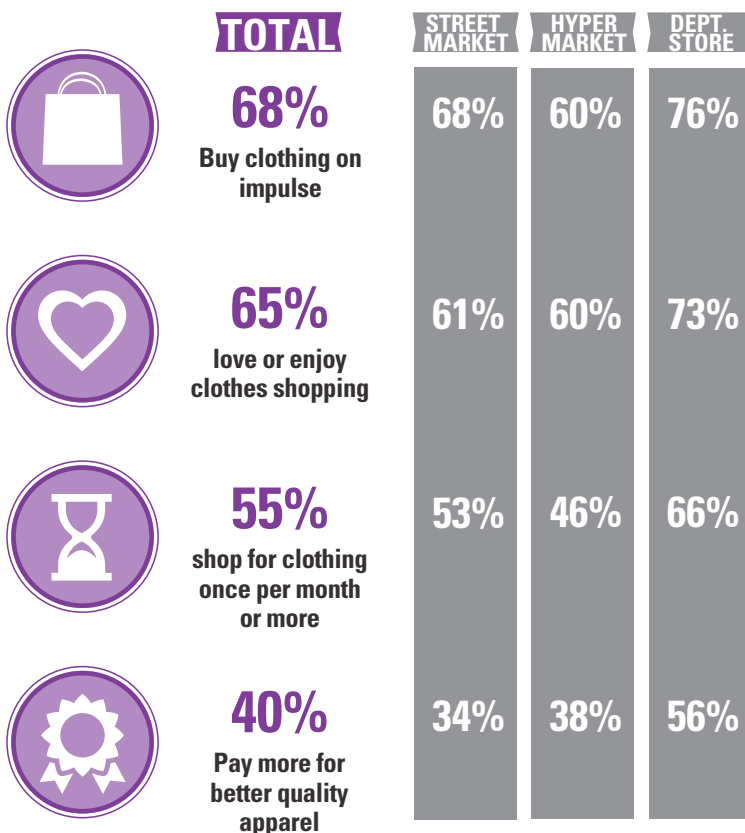
TOP SOURCES OF CLOTHING IDEAS



RETAIL CHANNELS SHOPPED MOST OFTEN



APPAREL SHOPPING HABITS



@ 7 in 10 consumers say social media sites are their top online source of clothing inspiration.

Nearly 2 in 3 consumers say the quality of clothing at retail has declined over the past year.

TOP 5 CLOTHING PURCHASE DRIVERS



OMNICHANNEL SHOPPING

Only about a fifth of Thai consumers shop for clothing online and they are not destination specific, predominately utilizing social media to begin their online shopping journey. In order to take advantage of the strong projected growth in online spending in the coming years, brands will need to draw traffic to their own webpages through elevated shopping experiences that provide the detailed product information Thai consumers are seeking in their online shopping journeys.

TOP CONCERNS WHEN SHOPPING FOR CLOTHES ONLINE



91%

clothing quality



79%

shipping time



78%

clothing
availability



77%

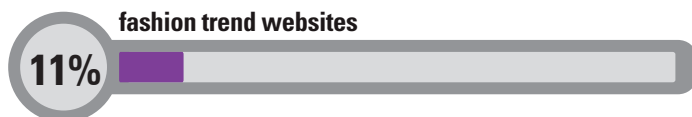
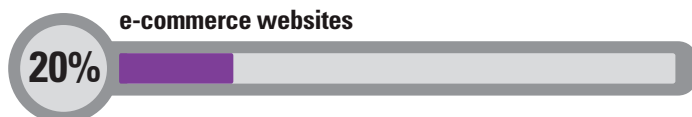
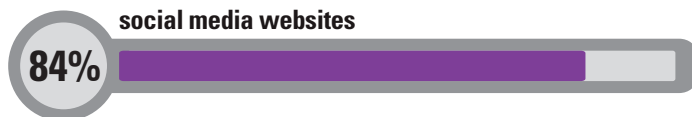
return policies



77%

information
privacy

WHERE CONSUMERS BEGIN THEIR ONLINE SHOPPING JOURNEY



FACTORS THAT COULD INFLUENCE ONLINE SHOPPING DECISIONS

84% detailed fit information

84% detailed size information

74% fiber content information

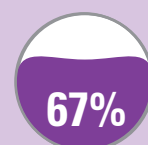
71% views in multiple colors

69% customer reviews

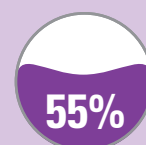


Online apparel & footwear sales are projected to grow 68% from \$86.5MM in 2015 to \$145.5MM by 2020¹.

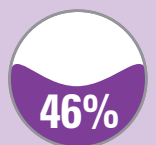
21% SHOP ONLINE & USE THE INTERNET TO...



browse styles



research apparel



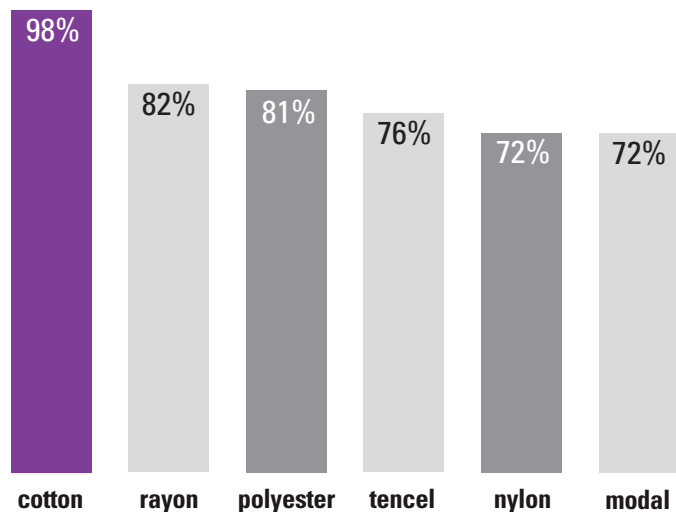
read customer
reviews

GLOBAL LIFESTYLE MONITOR: THAILAND

SEEKING SUSTAINABLE APPAREL

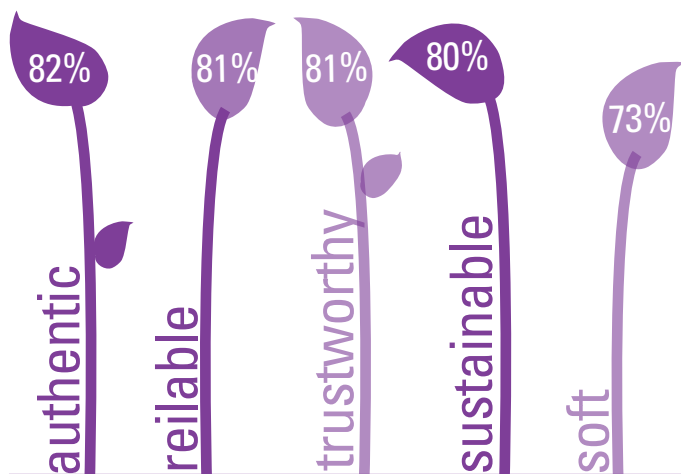
Thai consumers say cotton is their preferred clothing fiber because they view it as better suited than manmade fibers to meet their sustainable and functional needs as well as their desire for authenticity and reliability. Sustainability remains important as 3 in 4 Thai shoppers say they seek it in their apparel purchases. Opportunities exist to market cotton products as meeting shoppers' functional, emotional, and sustainable needs.

% SAYING THE FOLLOWING FIBERS ARE SAFE FOR THE ENVIRONMENT



81% of consumers prefer cotton-rich clothing & about 2 in 3 are willing to pay more for it.

COMPARED TO CLOTHING FROM MANMADE FIBERS, COTTON IS VIEWED AS THE MOST...



TOP SUSTAINABILITY/SOCIAL CONCERNS



GLOBAL WARMING



AIR QUALITY



WATER QUALITY



FOOD SAFETY

SUSTAINABILITY...

is something I seek out in my apparel.

75%

when it's lacking, I blame the industry.

56%

is important in my apparel purchase.

48%

TOP CONCERNS REGARDING COTTON PRODUCTION

1. Amount of chemicals & pesticides used
2. Greenhouse gas emissions
3. Amount of water used



COTTON SUSTAINABILITY FACTS

U.S. cotton farmers have reduced pesticide applications by **HALF** over the past 30 years.

Over the past two decades, U.S. cotton farmers have improved water efficiency by approximately 80%.

DISCOVER WHAT COTTON CAN DOSM at CottonToday.CottonInc.com.



Source: Cotton Council International and Cotton Incorporated's *Global Lifestyle Monitor Survey*, a biennial consumer research study. In the 2016 survey, approximately 10,000 consumers (i.e., 1,000 consumers in 10 countries) were surveyed. External Source: Euromonitor International¹