

# Global Lifestyle Monitor IV – Thailand 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
<b>Brazil</b>	<b>Face to face:</b> Sao Paulo, Rio de Janeiro, Belo Horizonte, Recife, Porto Alegre
<b>China</b>	<b>Telephone:</b> Beijing, Guangzhou, Shanghai
<b>Colombia</b>	<b>Face to face:</b> Bogota, Cali, Barranquilla, Medellin
<b>Germany</b>	<b>Telephone:</b> national
<b>Thailand</b>	<b>Face to face:</b> Bangkok, Chiangmai, Chonburi, Hadyai, Korat
<b>India</b>	<b>Face to face:</b> Mumbai, Delhi, Bangalore, Kolkata, Chennai
<b>Italy</b>	<b>Telephone:</b> national
<b>Japan</b>	<b>Telephone:</b> Tokyo, Osaka
<b>United Kingdom</b>	<b>Telephone:</b> 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 – Thailand

Fieldwork in Thailand was conducted by Synovate from March 2<sup>nd</sup> to March 22<sup>nd</sup>, 2006. This was the first time Thailand was included in the GLM. A total of 507 respondents were surveyed via face-to-face interviewing in five cities: Bangkok, Chiangmai, Chonburi, Hadyai, and Korat. Additionally, there was a 25-interview pretest in Thailand to verify that the translated questions were understood and question meanings were interpreted as intended.

The key respondent qualification requirement is that they purchase their own clothing. Quotas were set by gender, targeting 250 males and 250 females. All respondents fall within the 15-55 age range.

This summary of results highlights major findings in this fielding of Monitor IV.

### Store Examples Used During Interviewing:

- Department stores (e.g., the mall, Central, Jusco, PATA, Banglumpoo, Robinson, Isetan, Merry King, Tokyo, Zen, Emporium, Siam Paragon)
- Hypermarkets/Warehouse Clubs (e.g., Tesco Lotus, Carrefour, Big C)
- Chain/Specialty shops outside of department stores (e.g., Zara, MNG, FQ&L)
- Sports/Sporting good stores (e.g., Nike chain store)

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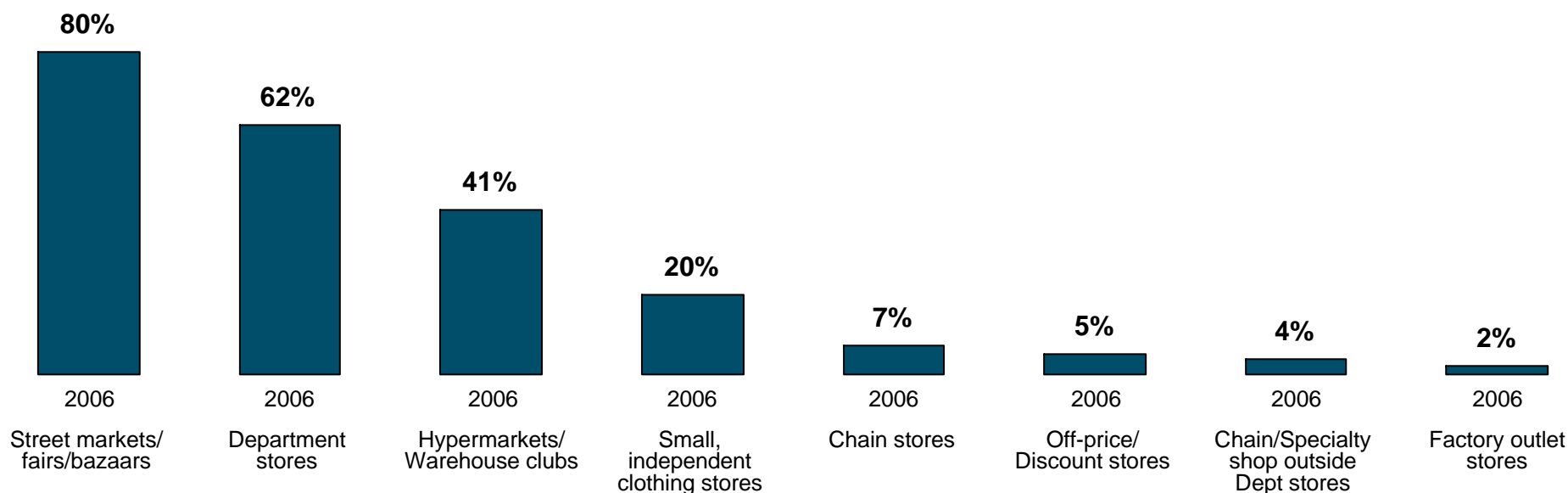
Base: Total Respondents: 2006 (n=507)

# Shopping and Fashion - Thailand

## Shopping and Fashion - Thailand

In Thailand, shoppers buy at a limited variety of venues. Street markets/fairs/bazaars (80%) are the primary shopping source, followed by department stores (62%) and hypermarkets/warehouse clubs (41%). Small, independent clothing stores are a distant fourth (20%).

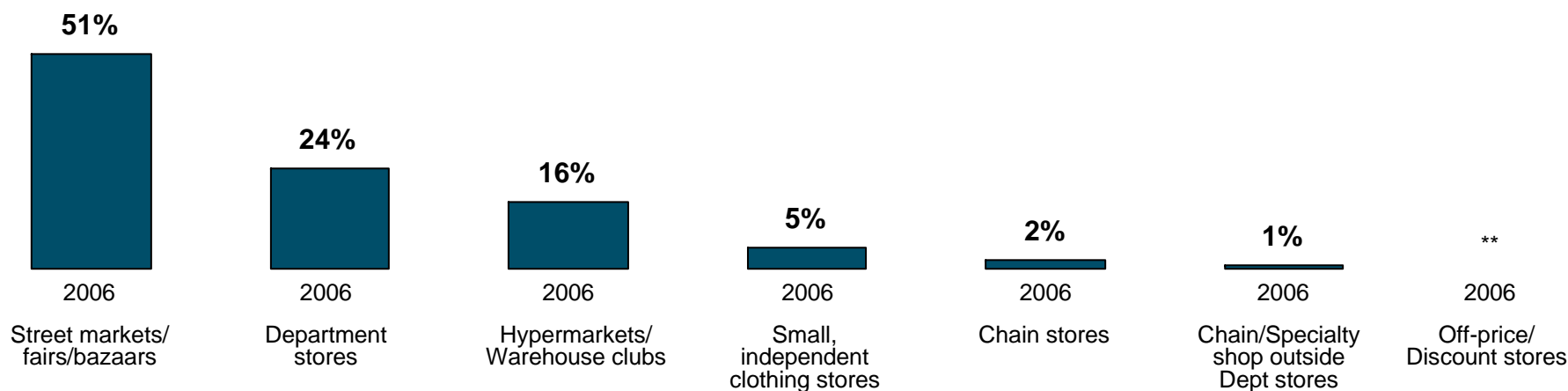
### Stores And Places Used To Buy Clothes For Yourself



## Shopping and Fashion - Thailand

Street markets/fairs/bazaars (51%) are Thai shoppers' primary clothing source, with over half buying most of the clothes there. Department stores trail with just less than a quarter (24%) of respondents buying their clothes at department stores.

### Stores and Places Used To Buy Most Of Your Clothes

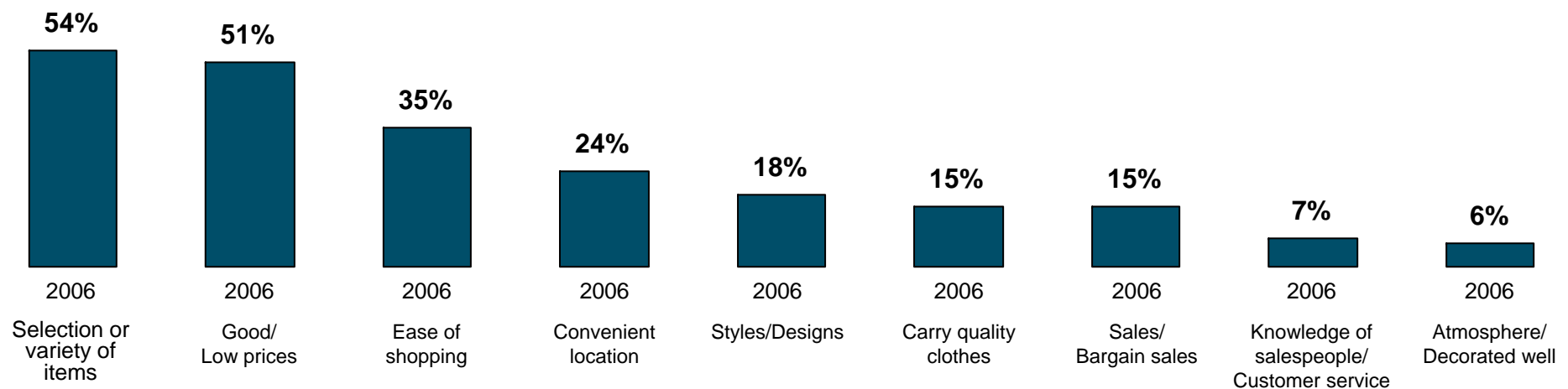


\*\* Less than 0.5%

## Shopping and Fashion - Thailand

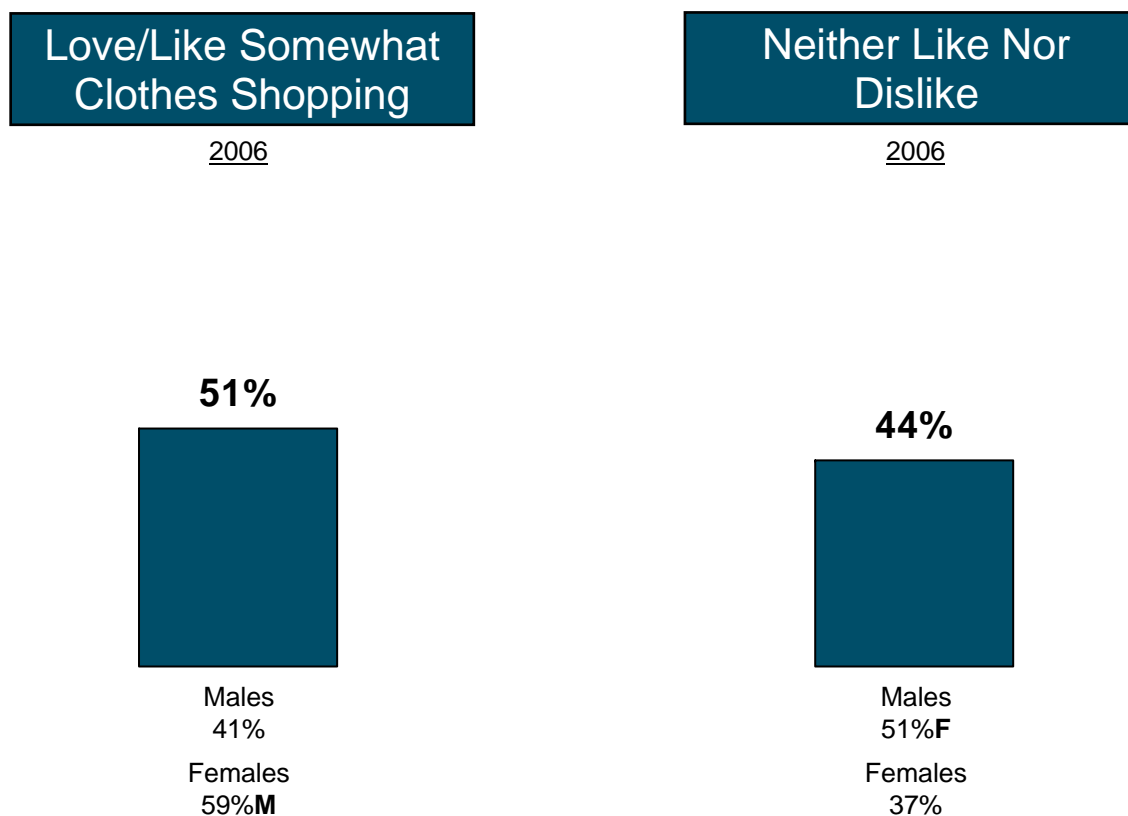
The selection or variety of items available (54%) is the top reason for liking a particular clothing store. Good/low prices (51%) are considered almost as important an attribute, followed by ease of shopping (35%) and having convenient locations (24%).

### Clothing Store Attributes



## Shopping and Fashion - Thailand

Thai consumer attitudes toward shopping are mixed. Only 51% love or somewhat like shopping for clothes, and 44% have neutral feelings about it. Typically, females are more inclined to love shopping than men.



F Significantly greater than women at the 95% confidence level

M Significantly greater than men at the 95% confidence level

## Shopping and Fashion - Thailand

Over the past three months, Thai shoppers spent an average of US \$61.00 on clothes, and almost half (47%) shop at least once a month.

Average Spent on  
Clothes In Past 3 Months

2006

**US**

**\$61**



Buy Clothes At Least  
Once A Month

2006

**47%**



Males  
40%

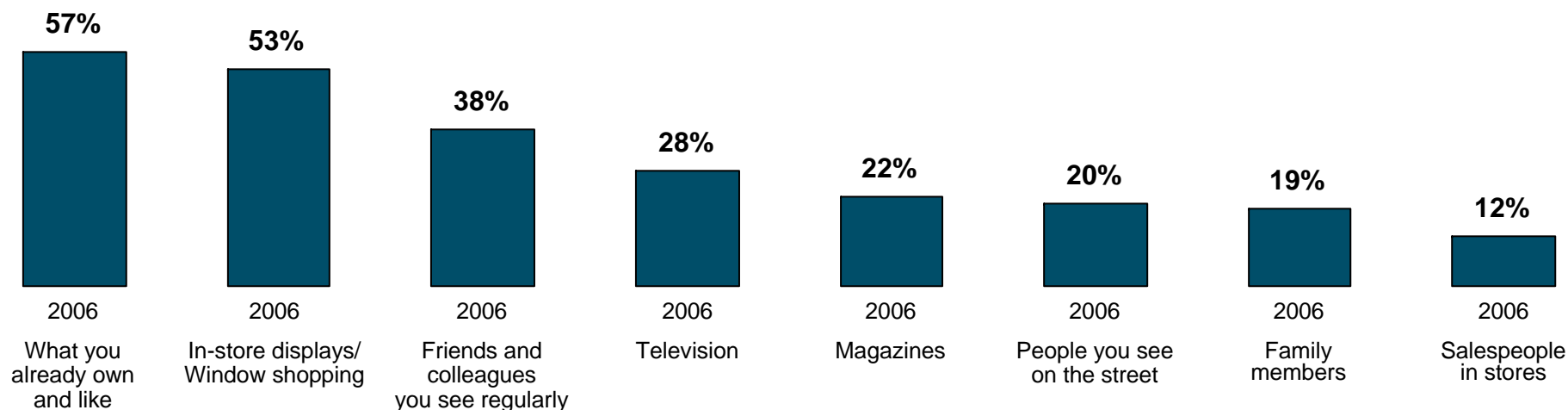
Females  
53%**M**

M Significantly greater than men at the 95% confidence level

## Shopping and Fashion - Thailand

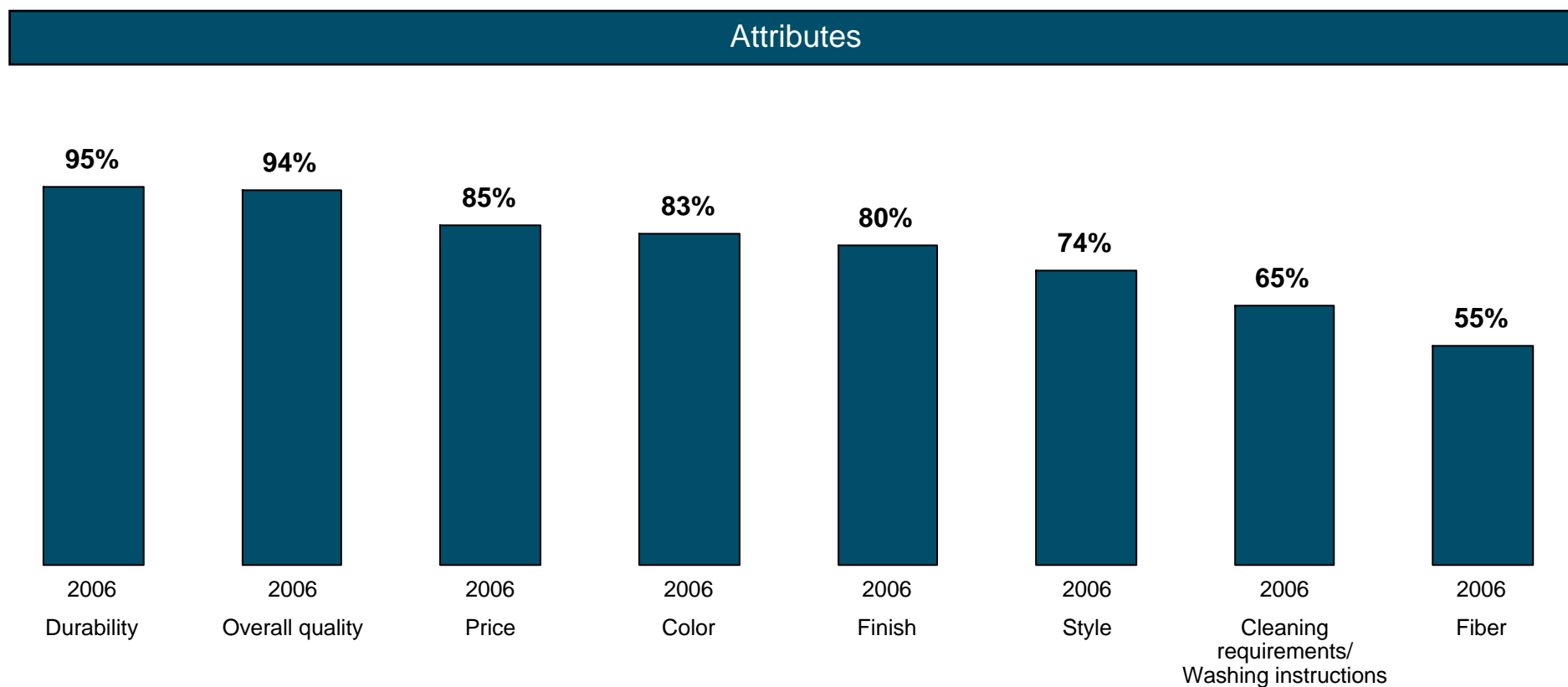
What Thai consumers already own and like (57%) and in-store displays (53%) are the main sources of inspiration for clothes. Also of importance are friends and colleagues they see regularly (38%).

### Place Where Consumers Get Ideas For Clothes



## Shopping and Fashion - Thailand

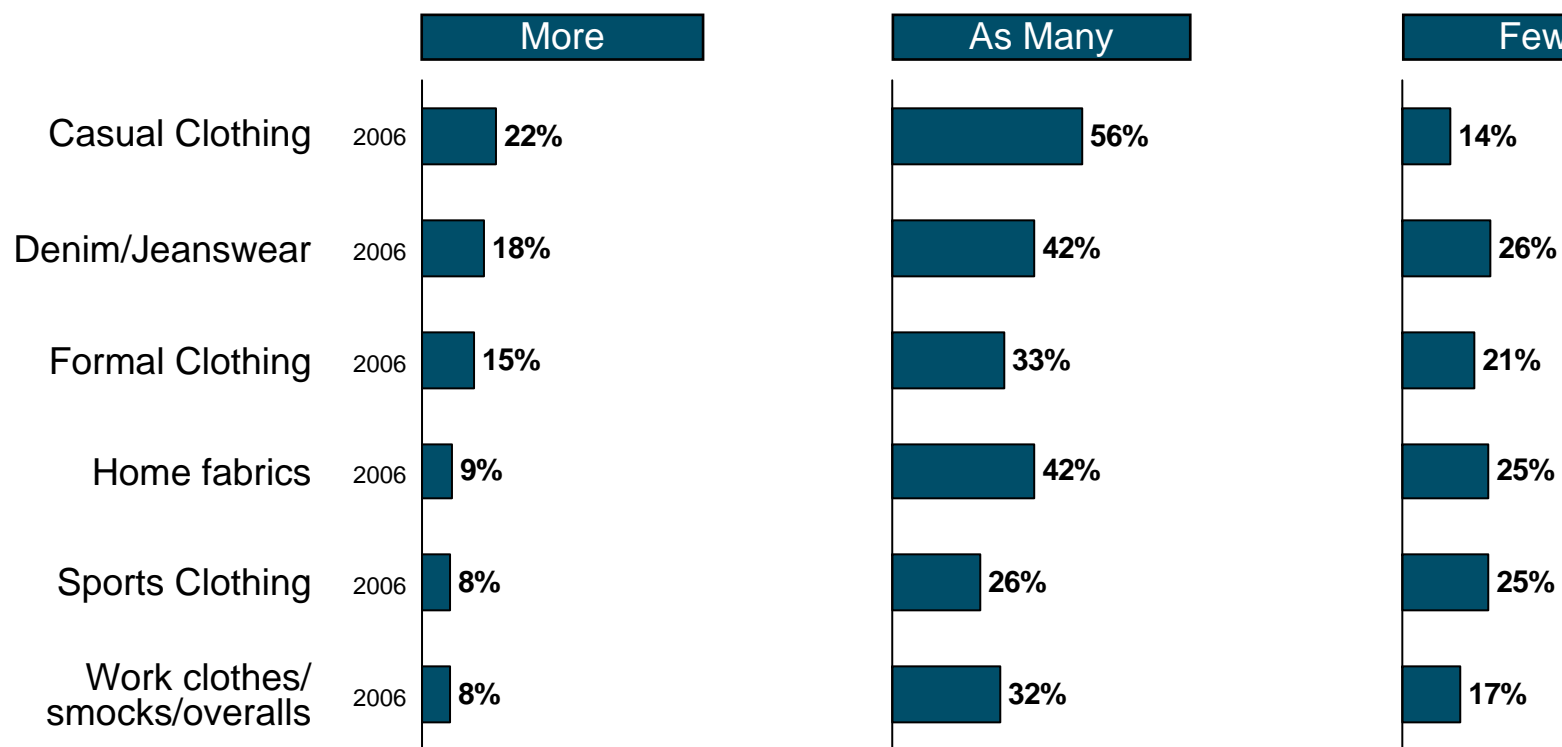
Thai consumers ranked many clothing attributes as important. Durability (95%) and overall quality (94%) were reported as important by the greatest percentage of respondents. Approximately 8-in-10 also mentioned price, color, and finish.



## Shopping and Fashion - Thailand

Over the next 12 months, shoppers are likely to purchase more casual clothing items (22%) and denim/jeanswear (18%). Over half (56%) also intend to maintain their shopping levels for casual clothing.

### Intent to Purchase More/As Many/Fewer Clothing Items Than in Past 12 Months



## Shopping and Fashion - Thailand

54% of Thai consumers shop at discounts of 20% or more at least some of the time. The remainder (46%) do so rarely or never.

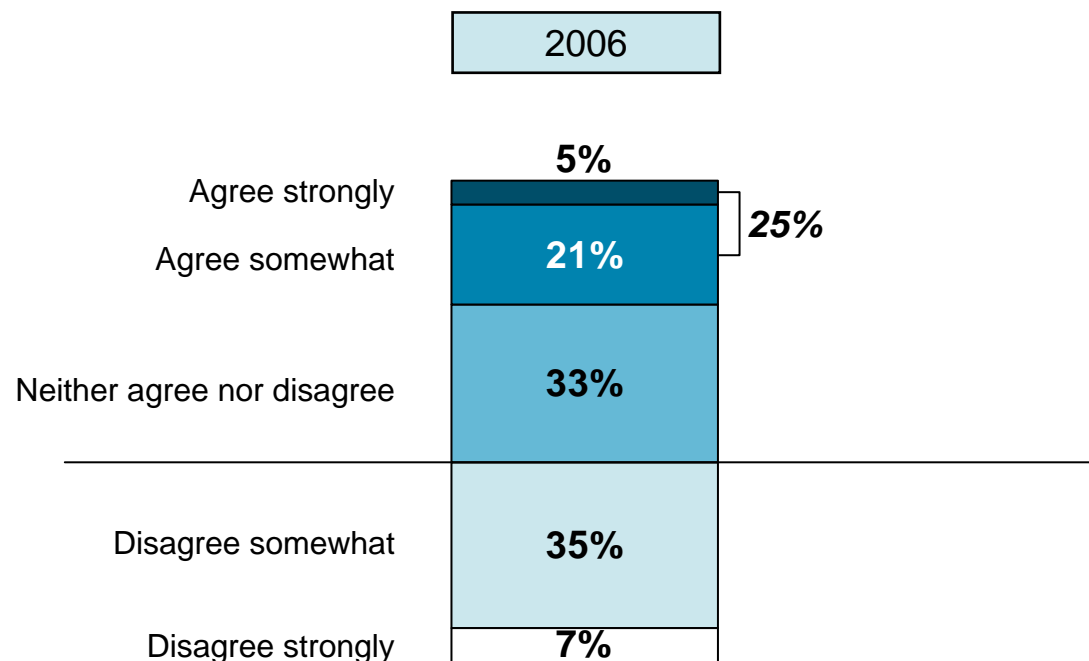


# Quality and Fibers - Thailand

## Quality and Fibers - Thailand

One-quarter (25%) of Thai shoppers feel it is important to have clothing made from natural fibers, while one-third (33%) do not have a preference, and 42% disagree that having natural fibers is important.

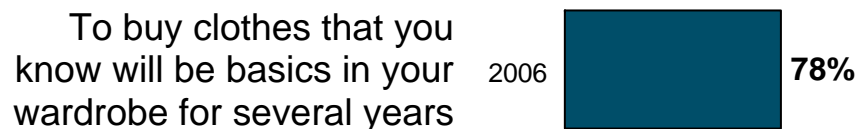
It Is Important That My Clothes Are Made From Natural Fiber Such As Wool And Cotton



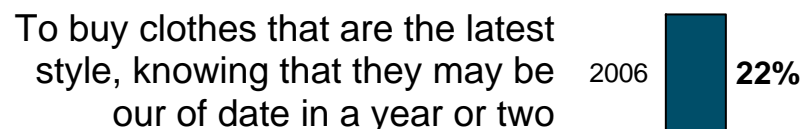
## Quality and Fibers - Thailand

An overwhelming majority (78%) of respondents prefer to buy clothes they know will be basics in their wardrobes for several years, as opposed to buying clothes in the latest style.

### Preferences



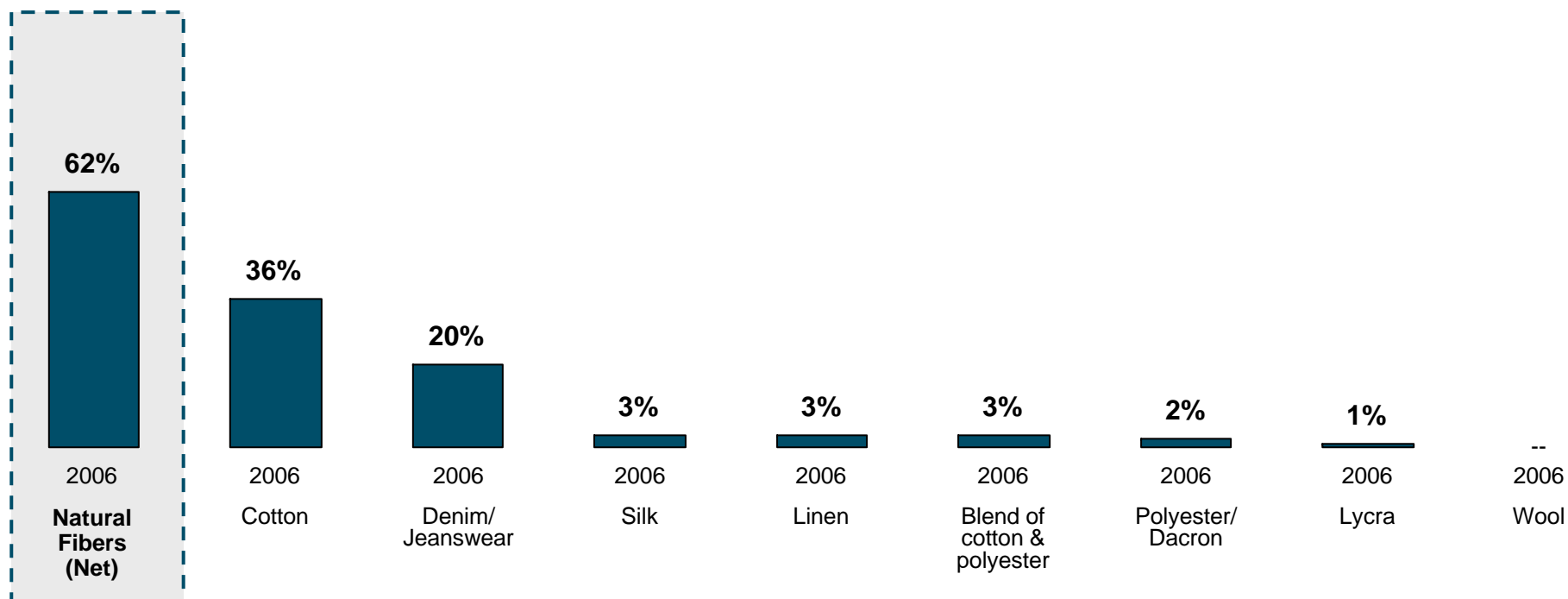
OR



## Quality and Fibers - Thailand

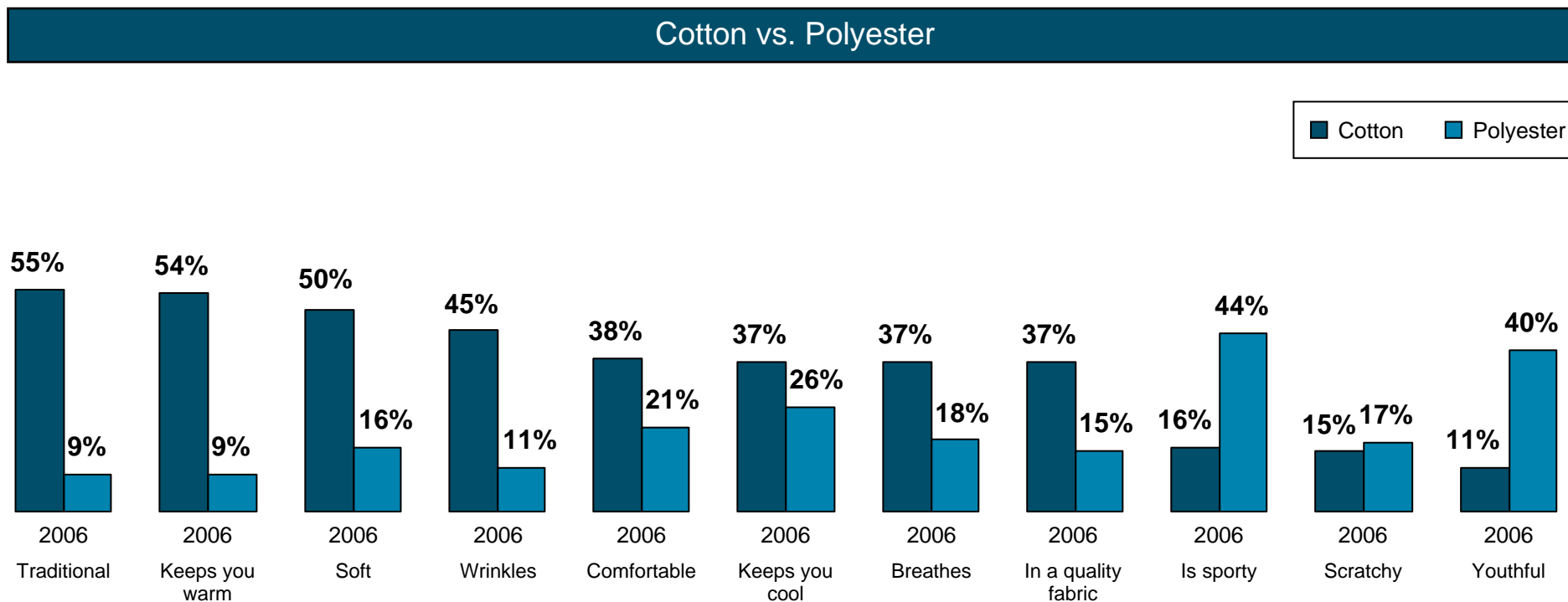
Just over one-third (36%) of all Thai shoppers believe that cotton is best suited for today's fashions, and almost two thirds (62%) prefer natural fibers in general. One-in-five (21%) respondents, however, did not answer at all.

### Fiber Best Suited For Today's Fashions



## Quality and Fibers - Thailand

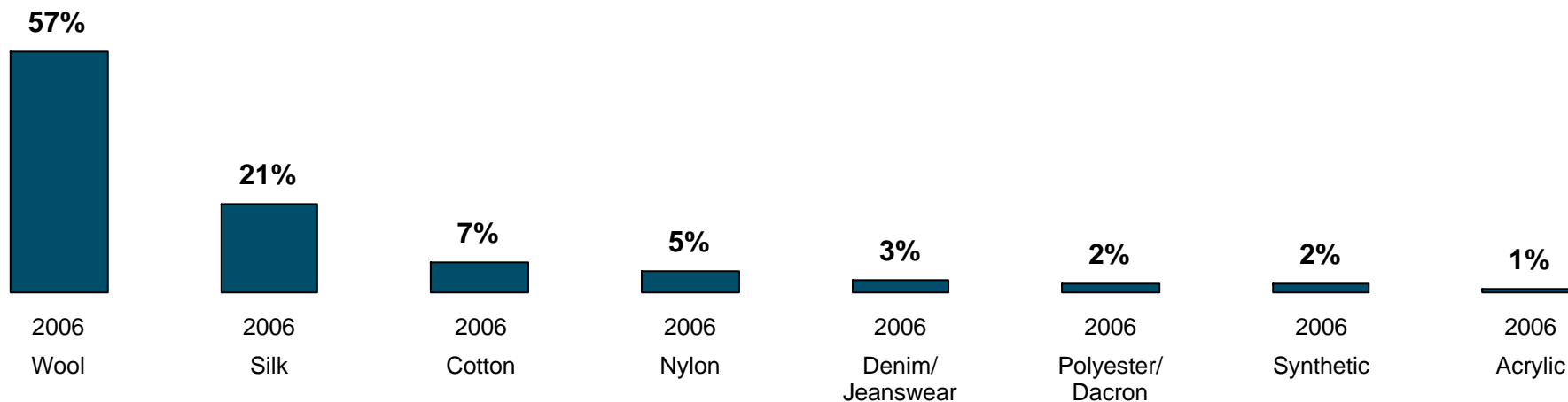
In comparison to polyester, cotton is ranked significantly higher in most attributes. Polyester dominates only in the perception of it being the sportier and more youthful of the two fibers.



## Quality and Fibers - Thailand

In Thailand, wool (57%) is the most avoided fiber, while silk (21%) is a distant second; cotton is avoided by 7% of Thai consumers.

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



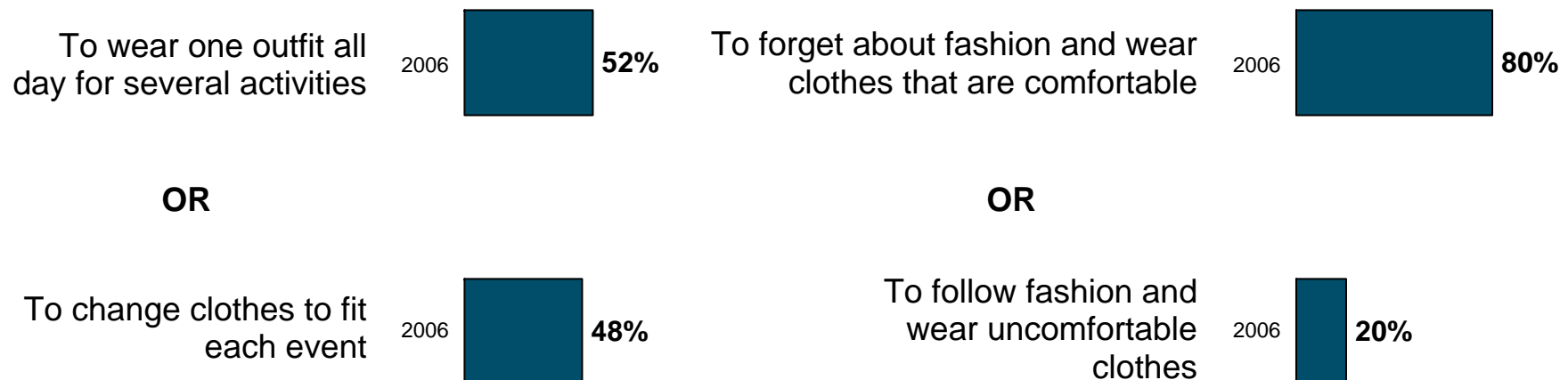
# Casual Dressing - Thailand



## Casual Dressing - Thailand

The majority (80%) of Thai shoppers prefer to sacrifice fashion in favor of comfort. For the question of one outfit for several activities versus changing clothing to fit each event, Thai consumers are relatively evenly split (52% vs. 48%, respectively).

### Preferences



# Denim & Stretch - Thailand

## Denim & Stretch - Thailand

Only 10% of Thai respondents know that denim/jeanswear is made from cotton. The majority of the remainder either believe it is made from denim/jeanswear (47%) or don't know/are unsure (39%).

Aware That Denim and Jeanswear  
Is Made From Cotton

2006

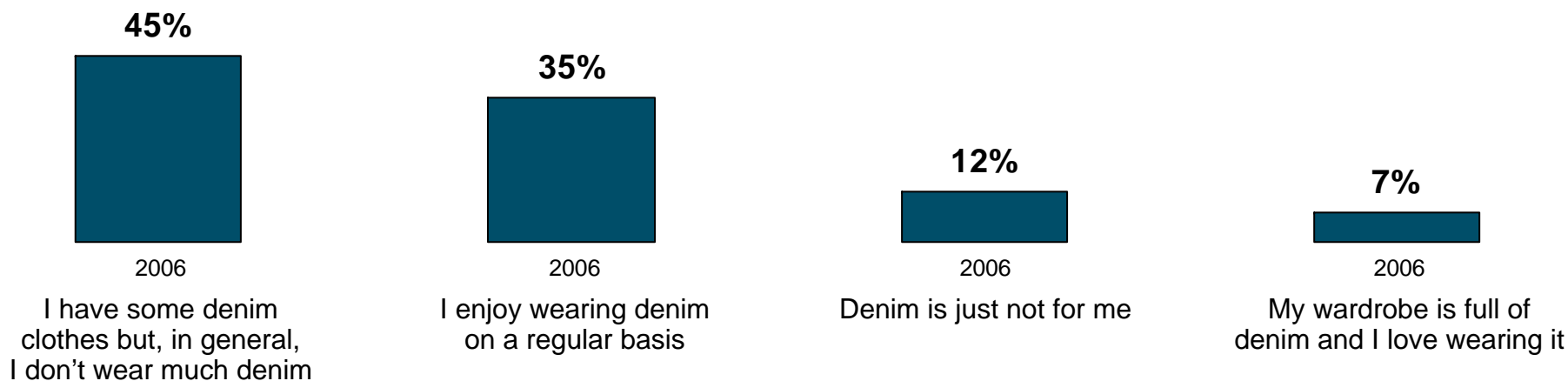
**10%**



## Denim & Stretch - Thailand

Roughly one-third of Thai respondents enjoy wearing denim, and just 7% of those interviewed love wearing denim. A majority (57%) of Thai consumers wear little or no denim.

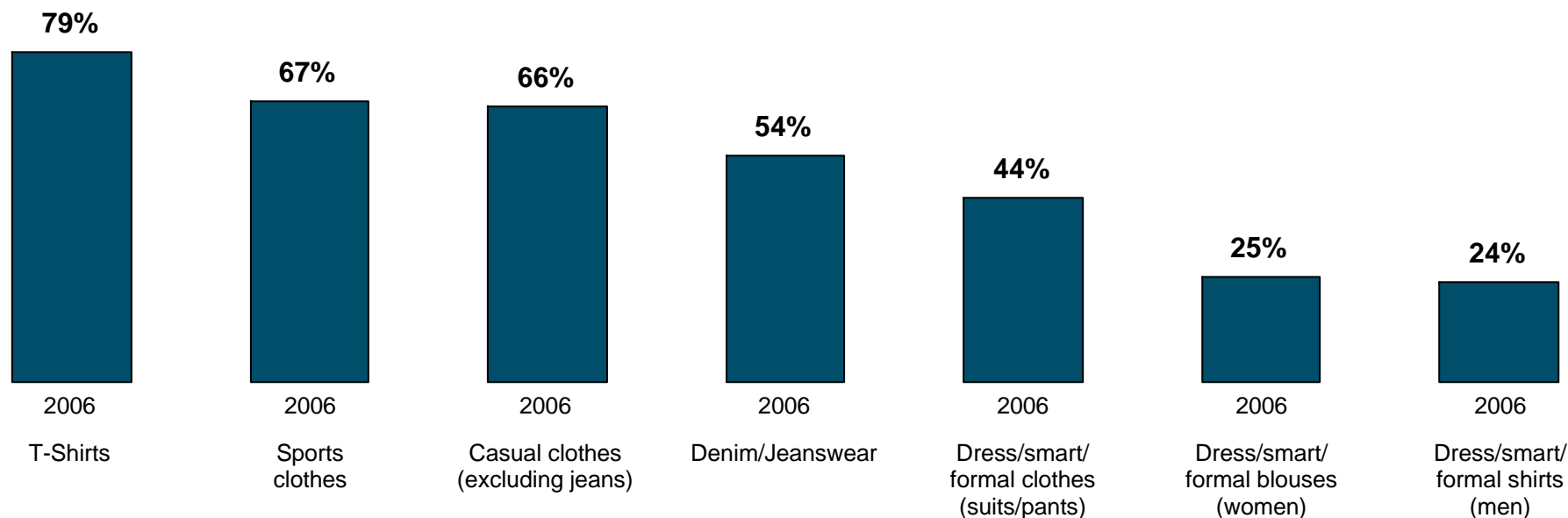
### Attitudes Towards Denim/Jeanswear



## Denim & Stretch - Thailand

The presence of stretch and elastic fabric is important in t-shirts (79%), sports clothes (67%), and casual clothes other than jeans (66%). Just over half also feel it is important in denim/jeanswear (54%).

Think It's Important To Have *Stretch Or Elastic* Fabric In Certain Types Of Clothing



# Recommendations - Thailand



## Recommendations - Thailand

Thailand is far behind the trends of most of the Asian markets. There are fewer varieties of stores and the stores are more difficult to get to for Thai consumers. Thailand consumer attitudes are reflective of this since there is little variation in how or where they shop, and there is very little knowledge of natural versus synthetic fibers. This can also be seen in the very small percentage of those who are aware that denim/jeans wear is made from cotton. Since Thailand is far behind the other markets, the basic knowledge based campaign is recommended:

- Targeting street markets and fairs as an educational starting point could be considered. Most Thai consumers are less aware of the basic benefits of cotton versus polyester than consumers in other countries.