

THE EXPLORATION OF PLUS SIZE APPAREL IN THAILAND



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.....
Miss Pimpisa Sittipun
Candidate

.....
Asst. Prof. Randall Shannon,
Ph.D.,
Advisor

.....
Assoc. Prof. Astrid Kainzbauer,
Ph.D.
Chairperson

.....
Duangporn Arbhasil,
Ph.D.
Dean
College of Management
Mahidol University

.....
Ronald Surachai Thesenvitz,
Ph.D.
Committee member

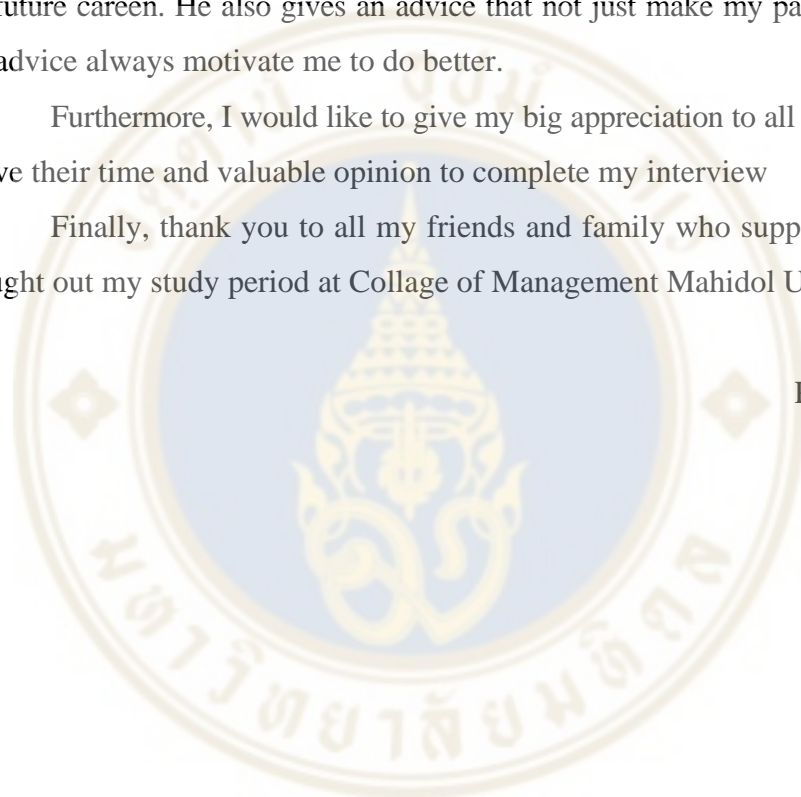
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Pimpisa Sittipun



THE EXPLORATION OF PLUS SIZE APPAREL IN THAILAND

PIMPISA SITTIPUN 5949155

M.M. (MARKETING AND MANAGEMENT)

THEMATIC PAPER ADVISORY COMMITTEE: ASST. PROF. RANDALL SHANNON, Ph.D., ASSOC. PROF. ASTRID KAINZBAUER, Ph.D., RONALD SURACHAI THESENVITZ, Ph.D.

ABSTRACT

The purpose of this research is to explore more about plus size customer in apparel industry. This research will discuss about the behavior of customer, customer pain point and how business can enter into this market and become successful. Furthermore, all the information is collected by using literature review and qualitative method.

The result of this research will identify who is the potential customer and how business should enter into this market to increase the opportunity to be successful. Since the target customer of plus size apparel product share very unique characteristics such as abnormal size requirement, purchasing behavior, pain point and how they solve the problem. All of these characteristics show that there is demand for more plus size apparel since the business that already in the market cannot satisfy the customer needs and wants.

However, on the manufacturer and retailer side, they still think that there is some limitation that prevents them from providing the product and service that customers require. In this research, it will give more information on what the manufacturer and retailer should do in order to stay competitive in this market and why the new business should enter into this market to expand their target group.

KEY WORDS: Demand for Plus Size Apparel/ Successes of Apparel Brand/ Plus Size Customer Behavior/ Plus Size Customer Pain Point

28 pages

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CHAPTER I

INTRODUCTION

1.1 Background of the Study

Consumer satisfaction is one of the factor to identify the success of apparel brand. Consumption is the action of acquiring, using and keeping the apparel. We can study consumer satisfaction by learning their behavior whether they buy the apparel or not, how much they spend and do they keep the apparel. Some customer might be dissatisfied with the apparel that they bought. From the total consumer, plus size women are the most dissatisfied because of the problem of sizing spectrum. Most women that purchase plus size apparel are dissatisfied with the fitness of the apparel, design and option available.

Market size of plus size customer in Thailand since there is increasing number of obesity rate. which mean that there is opportunity to grow in this industry. Satisfaction of the customer can be determined by self-concept, apparel fit, convenience and confident. If the brand able to create consumer satisfaction it will be benefit to the apparel brand because it will motivate customer to repurchase and recommend to other.

1.2 Statement of the Problem

There is research that done to study plus size customer regarding their dissatisfaction experience with the consumption process of their apparel. However, there is not much research that examining the plus size customer in Thai market. In fact, this research will gather information about plus size customer regarding the demand of this market, preference of customer, influence factor that motivate purchasing action and the channel of purchase. Most research that have been done are focus on survey, questionnaire which can be bias to the outcome of the research because plus size or obesity is very sensitive topic to ask in a survey or questionnaire. The participants of the survey might not give the truthful answer because it has negative effect on their emotion and self-image. Therefore, it is very important to gather information of the plus size customer

by listen from the women that have experienced any issues regarding their purchasing of plus size apparel.

1.3 Purpose of the Study

The purpose of this study is to understand the entire apparel market for plus size or obesity consumer. More specifically, this study aims to understand why it is important for brand to expand the apparel's size to fit plus size and obese customer or launching new product to satisfy the need of plus size apparel market. This will be achieved by learning about the (a) problem that the target customer has to face, (b) influence factor that motivate customer to buy the apparel product and (c) which channel of selling that will most satisfy the buyer. There is not much research that done on this topic in Thai market and the previous researches that have been in other market are mostly focus on surveys method, and focuses on young group of consumer. For Thai market in will be more efficient to study by interact with direct target group. This study is aims to provide more efficient information of Thai customer by interviewing women with wide range of ages group. Exploring the apparel market for plus size customer which will be benefit for the industry, both brand owner and customers. First, the finding will give more understanding of the overall market demand of the plus size customer and will provide insight of which factor that contribute to purchasing of the customers. Second, after understand the need and want of the market, it may help the apparel brand, retail and designer to take larger scale of sizing in to their consideration to produce and sales more variety product for plus size market. This will create benefit for every player in this industry.

CHAPTER II

REVIEW OF LITERATURE

This chapter will explore about the plus size customer to understand more about this niche market included how the people have perception toward themselves and other, spending power, culture and influent, issue of sizing and buying channel. This chapter will examine the target customer and understand they needs, wants any problems that a plus size customer have in order to purchase their desired clothes. The result of this chapter will be benefit for the manufacturer and apparel brand owner to understand more about the market. More importantly it will help to understand the problem of plus size customer and how to satisfy the customer in this niche market.

2.1 Plus Size Defined

Plus size is the term that describe the apparel in size 14 – 32. Since the size of apparel is not standardized, some brand has its own definition of plus size (Alexander, Pisut, & Ivanescu, 2012). Which can be considered one of the problem in this industry. Obesity also consider a plus size persons. Generally, classified as such Body Mass Indicator. A normal BMI is 18.5-24.9 while an overweight BMI is 25-29.9. The definition of the word “Plus Size” variant across different culture, value and perception. Therefore, have the standard measurement of the industry is very important. So that people in this market and the same understand of the standard. More importantly, standard sizing is very important for manufacturing. If the manufacturing has its own sizing, it will have an effect of the customer because the size might not match which what the customer have experienced in the market. To conclude, the manufacturing need to study the sizing standard of market in their country or in the market that the company want to launch the product.

2.2 Self-concept Construct

According to Sirgy (1979 & 1980) said “self-concept has four components: actual self-concept, ideal self-concept, social self-concept, and ideal social self-concept”. The difference between actual self-concept and the ideal self-concept is the image of individual vs. the image that the individual wants to be. The social self-concept is the image that the individual believes that other hold and the ideal social self-concept is the image that the individual would like other to hold. According to Marsh (1990) concluded that “as children grow older their self-concepts more accurately reflect information about self-provided by external sources”. Customer behavior will have direct motivation to protecting and improve they self-concept. Therefore, customer will purchase product that able to show the meaning of individual to themselves and to other. As a brand owner that want to launch apparel products in to this niche market, the brand need spend time understanding what kind of self-concept that the main target of the brand has. So that the brand able to produce the product that can reflect that self-concept to satisfy the customer.

2.3 Target Customer

Before launch any brand or product, it is essential to identify the target customer. Which can be identify by demographic, geographic, psychographic and behaviors (Lynn, 2011). For this research, the target customer is plus size female aged 25 – 40. This group of customer are residing in Thailand and have diverse interest. The profile of the customer that will be focus on this research will be identify by customer needs and wants in the different situation that the customer will use apparel product. The target group of this research can be classified as overweight or obesity.

2.4 Size Related Issue

The physical change of the body has an impact on decision to buy garment. Everybody physical change differently which garment shop defined sizing as SS, S, M, L, XL or XXL. Since 1997, obesity and overweight become a very serious problem

related with health. Most country in the world have recognized this problem of obesity and overweight. World Health Organization reported that 1.6 billion adults were overweight and more than 400 million adults were obese. In term of Thailand, there is a survey from Thailand National Health Examination showing the trend of increasing overweight and obesity in Thai adults from 25% to 48% in 13 years. In some country, there was a study showing that there is correlation between economic status and overweight and obesity. The lower economic status has greater risk for overweight and obesity that higher economic status. This might due to the accessibility to food quality and health related factor. In the last two decades, Thailand have change significantly in term of economic and health transitions. In term of economic, Thailand have change from agriculture to more industrialize which lead population to live in more urbanized community. This have direct effect on lifestyle change. People become more time conscious. Processed foods become handy which those food contain high fat and sugar. This is one of the factor that increase the obesity and overweight rate in Thai population.

2.5 Ready-To-Wear

People use apparel for protection, status and to express their lifestyle. In the past, apparel was made base on individual size and preference. With the revolution and lifestyle change, ready-to- wear apparel because the main choice for customers. With a high demand the manufacturing need to produce an apparel in mass production. In order to produce apparel in a high volume, standardized sizes need to become the way of production. Ready-to-wear apparels are produce to fit a certain individual body which that body sizes are unknown by the manufacturer. These studies use the current sizing of The American Society for Testing and Materials which is the universal standard sizing. Since the standard sizing is apply all over the world, the industry has to face the challenges to create an apparel size that will fit more variety of body size of the potential customer in the apparel industry. Studies have conducted on satisfaction of apparel have report that more than fifty percent of women in the plus size industry are not satisfy with the fitness of the apparel size (Ashdown, Loker, & Adelson, 2005). In this niche market of plus size apparel, target customer has the same and unique characteristic. They all have an experience with sizing issues and their main concern is the fitting of

the apparel. The reason why the apparel manufacturing and company have not yet able to solve this fitting concern of the customers might be because the lack of information about their customer needs and the information about the different in the customer body type and sizing that they require. Another issue that prevent the industry to solve the fitting issue is because the lack of methodologies to find the standardize for size and pattern for apparel that will fit a large target customers. If the manufacturer able to solve this fitting issue that the customer has, it will be able to gain more profit and able to stay competitive in this niche markets.

2.6 Apparel Purchasing in Thai Market

In order to understand Thai market, it is very important to understand the market in Asian because it might affect the growth of the company. In Asian apparel industry have grown and expected to grow even more for the next 5 years. The expenditure of the apparel has increase about 10% (PWC, 2016).

Now Thailand have change from low income country to and an upper-middle income. However, Thailand's economy has slowed down due to several reasons such as big project investment by the government, domestic political and instability. But there is a report showing that today Thai economic have slowly recovery with expected growth of at least 3% per annum from 2016-2020. Consider country in Southeast Asia, Thailand is of the sophisticated consumers. Thai customers seem to not be price sensitive. Especially for trendy products such as clothing and footwear. There is a research from Deloitte showing that when it comes to clothing, fit and comfort become more important factor than price when purchasing (Deloitte, 2016). It can be said that Thai customer have higher purchasing power and lower price sensitivity. In the higher income segment, people are willing to pay more for a product that satisfy their need and want. This information can be useful to the company that there is opportunity to offer the product with a higher price if that product about to satisfy the customers.

2.7 The Potential Influence of Culture

The ideal body shape and size have change overtime but we cannot be denied that in this point of time thinness become the body shape that society identify as ideal body type. Fashion is one thing that have to involve in people life for many years. Fashion have been described as “A reflection of our time and a mirror of the prevailing ideas in our society” (Keiser & Garner, 2008). In the history until the present time. Fashion always be one of the tool to express the culture and value of each society. In term of fashion it can be consist of cloth, footwear, accessory and more. In this research will be focus on the clothing apparel which have the main effect on expressing value and culture since it the main item that other people can see from the wearer from the outside. This is one of the reason why when people grow up their style of apparel change. When people grow up, they explore to different environments that change they value and culture. In Thailand, when it comes to clothing are very different between culture group. The location of where you live also have an impact of how you dress. Some culture dress according to their lifestyle such as they occupation. Some culture dresses up to show their role and status. This different reason of choosing their desired apparel will become very important information in the designing stage. So that the company can focus on more target group if the brand understands the requirement of difference group of customer.

Social media and celebrity adornment play a big role in shape the culture in Thailand. Super model body is tending to be very thin and tall. In the fashion industry use this body type which can be considered underweight to promote their product. Some people use that body type to reflect that as an ideal body. Mass media such as television or internet become source of information in daily. People consume information on the media and perceive that as a good influence. For example, information regarding celebrity body shape and clothing become an ideal image that every people like.

When the culture promotes that thinness is the ideal body image. Retail store and manufacturing will sell and product their product to match with the potential customer culture. Now it creates difficulty to the plus size customer which still consider the niche market to buy the apparel because the fashion style does not necessarily fit all body shapes and size. Size label also become one of the factor that determine whether the customer will purchase the product or not. There is a report said that people perfect to buy a product

that label a size smaller than what they actual size. This behavior come from the society influence that wearing plus size is not acceptable or not a preferable size.

2.8 Buying Channel for Garment in Thailand

There are a lot of channel of distribution in the Thai market. In term of offline market, Thailand have retail store that location in shopping mall, hypermarket, and local market. All of this channel can be an effective market to distributing the product. Retail store will be able to create benefit to other the brand owner and customer. For customer, if they visit the store to purchase the product such as apparel. They can see, touch and try on the product to decide whether the product is satisfied their need and want or not. There is no risk of getting the product that are not satisfy. For the store owner or brand owner, will be benefit from have their own retail store because the owner can interact with the customer to understand more about what is their need and want. More importantly, if the owner has a good quality produce and good service it can create more brand loyalty since the customer will trust the owner when they saw and have the communication about the product. Another channel of distribution is online channel. In the past three to five years Thailand have improve the infrastructure to improve the internet application. Now that the rise of e-commerce and digital economy become one of the most efficiency way to distribution the product. Since this channel of distribution is very easy to entry. It can be lead to higher competitor. So, it very important to understand the customer behavior so that the company able to have direct and effective communication to the target customers Thailand is the highest user of mobile, social media and internet in Southeast Asia. This information combines with almost 70 million population make Thailand become a good opportunity to for e-commerce. More interest information is that the among of hours Thai people spend on social media is about 2.9 hours per days when the average spending time of the global is only about 1.7 hours per day. The Business to Customer segment growing by 34% by doing their business online (Deloitte, 2016). It is very important to understand which type of distribution that will be benefit for the company the more. Or is it ideal that the company need both channel of distribution in order to become successful.

2.9 Inconvenient for Plus Size

In Thai society, customer rarely face the problem of scarcity in any product category especially, in the apparel market because Thailand is known as one of the big producer. This is not true for plus size women. This group of customer are marginalized in the apparel and fashion industry. Due to their body size that consider large than the average customer. Most apparel retail store do not carry clothes for plus size customer. The store only carries plus size on their online shop. The American clothing retail store that also have a bench in Thailand such as Gap, H&M and Forever 21, do carry plus size apparel but only online shop (Krupnick, 2013). In addition, fashion industry is using the model that not even be plus size but padding to create the illusion of hourglass figure but this type of body is not common body size in the population. This can confuse the customer when they have to buy product online. Moreover, retail do not carry plus size apparel because of the brand image. People have perception that plus size and obesity is unhealthy. This even motivate the retail and designer not to design cloth for plus size customer. They might think that it not matches with the image of the brand. Some retail might think that to produce larger size range might affect their cost of production. (Scaraboto & Fischer, 2013; Clifford, 2010). This factor might not make sense in term of economic. Consider that there is growth in plus size women. This could create a missed opportunity for business to generate revenue.

2.10 Apparel Design and Aesthetics

Design and aesthetics play significant role in customer purchasing of a product. It is important for the apparel to be able to create sense of confident for the wearer. The sensory of the customer can be create by the detail of the apparel such as fabric, cutting and color. For example, the way that fabric move or change how it look when the wearer move their body it can create sensory experience for the customer. (de Klerk & Tselepis, 2007, p 415; Bye and McKinney, 2007). For plus size customer might not satisfy with this sensory because there is lack of the option for clothes. The most concern for plus size customer is the fitness of the apparel. Therefore, it hard to find cloth that fit and also create the sensory satisfaction. It is important to concern about the confident of the buyer because it not only create the sensory satisfaction but it also create emotional

satisfaction for the buyer. Therefore, if the brand able to create the sense of confident in the product and provided the right size for the customer, it will create more satisfaction from the customer. Which can lead to the growth of business.



CHAPTER III

METHODOLOGY

3.1 Qualitative Interviews

The aim of this study was to gain the overview of the plus size market in Thailand and understand the factor that influence the customer to purchase the product. In order to use this information to benefit brand owner and retailer. Moreover, this study can also benefit plus size customer. If the brand owner or the retail know that there are demands for this market and opportunity for their business to grow. They will create more variety of size and product to satisfy the customer. The qualitative approach is use to study where we do not know much information about the subject. In order to gain the objective of this study, qualitative semi-structured interviews were conducted. In the semi structured interview, the interviewer or the researcher will be able to guide the conversation and allowing the interviewee to share as much ideas or information as much as possible. By conducting the two-way communication, it allows us to have a good discussion which help the researcher to gather deeper information from the interviewee. McCracken's (1988) long interview technique is different from other type of interview methods since it designed to give the investigator a highly efficient and more productive. Moreover, in the semi structured interview it allows the researcher to understand the thoughts of the interviewee and feel what it like in their shoes. However, in the interview, the researcher need to be concern of two important limitation of qualitative research which is time scarcity and the interviewee's concern of privacy

3.2 Sample

In this study, ten participants were chosen based on their gender, age and their classification as plus size. Which in this case the researcher will only focus female who age between 25-40 years old and have history of purchased plus size apparel. Moreover, the participants for this study were recruited from people that live in Bangkok. Participants

were recruited from all education and all income level. The reason to use female who age between 25-40 is because they are the potential customer that face with many challenge in term of finding fit apparel. Because women have many factors involved when it comes to purchasing apparel such as design, function, fitness, and trend. Therefore, they are more likely to face the difficulty to purchase their apparel.

3.3 Research Questions

To explore apparel fit and sizing problem that occur in Thai market by plus size female aged 25 - 40 years old. In order to identify the problem that they face, determine whether they satisfy with the apparel that available for them or not and also explore plus size apparel market to see if it worth to invest in this market or not. In order to explore the market, the following questions were developed:

- RQ 1. Do you enjoy shopping for clothes?
- RQ 2. Where do you buy your clothes; online, in-store or both?
- RQ 3. How satisfied are you when you've bought clothes?
- RQ 4. How much you normally spend on one purchase?
- RQ 5. How many times have you had to return?
- RQ 6. What is the reason of your return?
- RQ 7. How often you shop per month?
- RQ 8. Have you ever experienced difficulty finding clothes that fit?
- RQ 9. Do you have any influence when buying clothes? Such as friend, family, celebrity.
- RQ 10. General question: Age? Weight? Apparel size?

3.4 Data Collection

This study used in depth semi-structured interviews to collect the data. The interview took place between July 23rd and July 30th, 2018. The average interview time is about 20 minutes. The interview was conducted via video call. This allowed both interviewer and participants to have face to face communication and see the reaction that the participant have to each question. The interview started off by provide the

information about the topic and the purpose of this interview. Participant also informed that all the information that they provided are confidentiality. As the outline of the interview, the main questions will gather the information about the pain point that participant have to face. In order to explore more about this plus size market the question was ask to about satisfaction of the apparel that they bought. To learn more about buying behavior of plus size customers, the question about buying channel, spending amount, returning product and frequency of purchasing were ask. The interview finish with demographic question such as age, weight and cloth size.



CHAPTER IV

DATA RESULTS AND ANALYSIS

4.1 Research Finding

In this section, each research question will find out the qualitative information to explore the issue and challenges of plus size customers. Some of the questions were ask to be able to make suggestion for the business that what to enter in to this market. After interview ten participants, summary of answers is as below:

4.1.1 RQ 1. Do you enjoy shopping for clothes?

One hundred percent of the participant really enjoy shopping specially for clothes. There are also sixty percent of participant response that their emotional have an effect on their enjoyment for shopping, the more stressful they are the more enjoyable they have toward shopping.

4.1.2 RQ 2. Where do you buy your clothes; online, in-store or both?

Ninety percent of the participant said that they buy their apparel from both online and in-store and ten percent said that they buy from online shop only. Most participant bought their apparel from H&M, Uniqlo, Zara and SOS. Which majority of the store is international brand except SOS. The reason why they prefer to shop in-store because of the sizing concern. They want to make sure that they get the right fit. By shopping in-store will solve this concern because they able to try on the clothes before purchase.

4.1.3 RQ 3. How satisfied are you when you've bought clothes?

Majority of the participant are more satisfied with the quality of the product when they buy the product from shop but they are more satisfied with the price when buy the product online. If there is any error or defect of the product that they bought they will be more dissatisfy if they bought it from in-store since they have to pay a higher price than buying from online shop.

4.1.4 RQ 4. How much you normally spend on one purchase?

The price range is very varied between 390 - 1900 baht per piece. The highest price that they willing to pay to buy clothes online is about 650 baht but if they buy in-store they are willing to pay up to 1900 baht. The reason is because they able to try on the product and because they know the brand they can trust the quality.

4.1.5 RQ 5. How many times have you had to return?

Ten percent of participant had return they apparel back to in-store and online shop. But most online shop has no return policy. The rest of ninety percent said that they want to return the clothes if they able to but at the same time they are not bother to return the clothes if they have to waste their time and cost of return the product back.

4.1.6 RQ 6. What is the reason of your return?

The main reason of returned their clothes is the mistake in size. Some clothes label it as XL size but it does not fit the wearer. Clothes might fit they over all body but too tight in certain area.

4.1.7 RQ 7. How often you shop per month?

Majority of the participant buy their clothes at least 3 times a month for both online and offline. For online channel, participant have more tendency to buy because of the advantage of price.

4.1.8 RQ 8. Have you ever experienced difficulty finding clothes that fit?

Two main difficulties that participant have to face are sizing and design of their apparel. In term of sizing, there are two problems identified. First, the overall size of the apparel that they desire is does not fit they body. Second, the overall size of the apparel fit the body but too tight in some area such as legs and arms.

4.1.9 RQ 9. Do you have any influence when buying clothes? Such as friend, family, celebrity?

100% of participant said that there is no influence when it comes to purchasing plus size apparel. There might be some recommendation of the store that sell plus size apparel but when it come to the final decision of purchasing there is no influence. All the participant state that purchasing they apparel is very personal in term of size and preference of design.

4.1.10 RQ 10. General question: Age? Weight? Apparel size?

Table 4.1 General question: Age? Weight? Apparel size?

Age	Weight	Apparel size
25	65	L - XL
28	72	XL
28	110	XXXL
30	70	XL
30	79	XXL
30	84	XXL
31	69	L-XL
32	82	XXL
35	71	XL
37	67	XL

4.2 Observation of Participant Emotional

During the interview, there was many emotions that the participant has expressed. In the beginning of the interview when the participant gets asked about the enjoyment that they have when shopping. All the participant expresses the same emotional which is happy and excited. On other hand when they get ask about what is the reason that they go shopping or what influence they to go shopping more often. The answer was when they feel upset, stress or sad. This could be because the participant finds shopping

very enjoyable. Therefore, when they feel upset or sad, they use shopping as a way to get rid of the bad emotional.

Another emotional change during the interview was when the participant gets asked about how satisfy they are when buying an apparel. All the participant gets very involved and start to compare they experience when purchasing an apparel in store and online shop. When they talk about in store shopping. They show the happiness sign regarding the quality of the clothes that they received but complaint about the price about the product. On other hand, the participant gets very angry when they talk about their experience when they shop online. They all mention that the quality of the apparel that they received is not satisfy. even though, they are dissatisfied with the quality but when they get ask whether will they continuous to purchase their apparel the answer is yes. Because the price is low enough for them to take rise of receiving bad quality apparel. Another benefit that participant mention is convenient. They don't have to waste time of travel to go shopping for their apparel which can be very costly.

Last emotional that able to observed during the interview was frustration. All the participants are very frustrated when they get ask about the how difficult it is to find the apparel that fit they perfectly. Many participants mention that when they went shopping in store there are not many image or showing clothes for plus size apparel and some design that they want is not offer plus size or you able to purchase it online only. Some participant even mentions that sometime she has to buy pregnant women clothes because it the only clothes that will fit but she did not satisfy with the design. The frustration of not able to find the clothes that fit is very strong that some participant mention that “I will buy the clothes even I didn’t like the design because it good enough that I able to find the clothes that fit me”

4.3 How The Participant Overcome Their Struggle

This research has shown that there are many struggles that participants have to face when purchasing plus size apparel. The biggest challenge that participants have to face is trying to finds the apparel that fit them. There are two ways that participants mention that they have to do in order to find the clothes that they able to wear.

First, buying men clothes instead of women clothes. Normally, standard size for men clothes tend to be one size bigger than women size. This way they are able to buy a bigger size apparel. But this solution still does not solve the problem. Because not all the men clothes are in the design that women are able to wear. The style of men clothes might fit one individual but not other. Therefore, this solution is the way to solve the problem at the ending side which is not sustainable.

Second solution that women have to do when they face the struggle of buying plus size apparel is buying pregnant women clothes. This solution tends to be used by the participant that weigh more than one hundred kilograms. For this group of customer, their main concern is to be able to find the clothes that they are able to wear. However, this way is not able to solve all of their problems. Even, they don't care much about the design but as one of the participants mention "Nobody want to look like pregnant women when they are not pregnant". This solution is able to solve the physical problem by being able to find the clothes that fit but it dramatically hurt the emotional of the customers. Therefore, this solution that the participant uses to try to solve their own problem is not the best way to entirely solve the struggle that they have to face.

As mentioned above, the industry still needs to find the way to solve the problem for this group of customer. If the business is able to solve the struggle that plus size customers have to face by offering the right product size and design, it will create one of the success factors for the business.



Figure 4.1 Summary of observation

4.4 Summary of Qualitative Finding

After interview ten participants that can represent Thai market for apparel industry, there are four interesting topics that should be deeper explore to benefit business in apparel industry. In order to fully understand the business target market and opportunity of the business, it is very important to understand the plain point of the target customer and their purchasing behavior such as channel of purchasing, frequency of purchase and spending amount.

Since plus size apparel is a very niche market, if the business able to identify and solve the plain point of the customer it will definitely give the advantage for the business to success. After the interview, the result came out that two plain points that the customer have are sizing and design. In term of sizing, it very difficult to find the size that fit their body perfectly. As the American Society for Testing and Materials International provided the chart for standard sizing that most apparel manufacturer follow, this chart is not necessary fit with the body sharp of Thai customers. The biggest challenges facing the apparel industry today is creating a well-fitting garment to wider target market (Ashdown, Loker, & Adelson, 2005). The target customer identify that the problem is they might be able to find the size that fit they overall body size but not fit a certain area of their body. Since the apparel is ready to wear it cannot be customer to an individual need. Therefore, the customer is very struggle with this problem. Next, design of the apparel. Many participant states that is it very difficult to find the design that they satisfy and also fit their body type. Most design of the apparel that fit them is very out of date design. Since most shop that the customer able to find they apparel size is international chain. Therefore, the design will be the same all over the world which might not match with the desire of Thai customers.

In term of channel of distribution, there are two main channels that the customer found that they offer the product that the customer wants. First channel is retail store. However, most retail that carry plus size apparel is the international chain store such as H&M, Uniqlo, Zara. All of these stores have relatively high price. However, those stores did not carry the plus size apparel in every design. In some design, it available online only. This reason might be because of the image and the space usage of carry all the plus size apparel. As an advertising of the brand you can see that the store never shows the plus size apparel to attractive customer because they think that plus size apparel

does not match with the image of the brand. Second channel that the customer found that it carries plus size apparel is online channel. This channel of sales has relatively lower price compared to retail shop. Customer have the perception that online shop provided more variety of design with low price. But when it comes to quality of the apparel it cannot be company with the apparel in the international chain shop. However, the customer doesn't mind the lack of quality of the product since it come with a cheap price.

After analyzing where the potential customer purchasing their product. It is important to know much often they purchase new apparel and how much they willing to spend each time. After the interview, the solve have come out that people buy new apparel at least three times a month. More importantly, the resolve of the interview has shown that emotional such as stress or sad have a very high impact on the frequency of purchasing new apparel and increasing willingness to paid. The spending amount are very different between retail shop and online shop. People tend to spend less for online shop but more frequency. To give exact number, people willing to spend maximum of 650 baht when they shop online. On another hand, people willing to spend maximum of about 1900 baht when they purchase apparel in store.

Table 4.2 Main Issue Observed from the interview

	Online	Offline
Pain point	Quality of apparel	Price of apparel
Emotion	Frustration, Angry, Tried	
Frequency of purchase	3 or more per month	1-3 per month
Spending of purchase	Maximum 650 baht	Maximum 1900 baht
Competitor	V&B, LYN plus size, Cross twelfth	H&M, Uniqlo, Zara, SOS

CHAPTER V

CONCLUSIONS AND RECOMMENDATIONS

After study, secondary research and conducted interview with ten participants. It can be concluded that in Thai market plus size apparel is in demand for more provider and product availability. Plus size apparel is in high demand because there is lack of provider, size available and design preference. The research has shown that there is demand and customer are willing to spend money to buy the apparel that fit them. In term of competitor, there is not many retail shop. However, the retail shop that are available are very big international chain which might be difficult for startup company to complete with. For online shop, there are many shop that available but still cannot offer the quality that the customers are looking for. Therefore, if any new start up brand can offer a good design with satisfied quality, it will be able to complete in this market.

5.1 Recommendation for The Industry

The main focus of the apparel industry is able to make profit and target to the right customer. Therefore, all the implications for both manufacturers and retailers is to maximize profit. There is data supported the need of assumption for plus size apparel worldwide (American Heart Association, 2013; U.S. Census Bureau, 2010; Center for Disease Control, 2011b; World Health Organization, 2007). Take this information into consideration, manufacturers or retailer cannot denied that there is a growing opportunity of them and they need to offer the right plus size apparel to the customer if they want to stay competitive in this market. This research has shown that the manufacturers have losing opportunity to grow by not offer the apparel with more size range, up to date design and price that the customer want. Many time that the customer has to leave the store or leave the website without purchasing any apparel because they couldn't find the apparel that fit their body shape or the design that they looking for. It is a must for the apparel manufacturer and retailers need to set up a new size measurement or reevaluate

the sizes that they are offer. Otherwise, they might loss profile or not able to gain market share because as of now the product that they offer or not meeting the need of plus size customer. There is some controversy that the brand such as Zara refusing to carry plus size apparel. The brand gives the reason of not carry the larger size because it might affect the brand image in the long run. (Abercrombie, 2013; Chang, 2012). One of the big mistake that retail shop does is separate plus size section with other size clothes. This separation creates customer embarrassment when they shop with other people. It would create better shopping environment if the store combined all the clothes size together so that we the customer able to shop together and don't feel judgment. When the customer has good shopping environment, it will motivate the customer to spend more money in your store which create more sales and market share.

For online retails, after interview participant many people say that a lot of online shop don't have return policies which is one of the weak point for online retails. Because not every plus size customer has to same body shape. Therefore, the apparel that fit one individual might not fit other. Therefore, to create competitiveness for online retails it need to create a return policies to satisfy the customer need. Another improvement that online store should take into consideration is the accuracy of sizing label on the clothes. There were many participants that mention about the sizing of the apparel that they received is not match with the size of the label. Selling product require a lot of trust from the customers. Therefore, all the shop need to create that trust so that the customer keeps repeat the purchase.

Table 5.1 Recommendation for the industry

Manufacturing	Retail store	Online store
- Creating more plus size apparel - Creating apparel size that will fit different body sharp	- Create better shopping environment, No separation between plus size and standard size	- Create return policy - Create accuracy sizing label

5.2 Directions for Future Research

There are several areas that can be further research and to progress towards the solution of the plus size apparel industry. The following are the area that can be uncovered; (1) Apparel issues for male plus size; (2) development of methodologies for pattern grading; (3) plus size concerns with purchasing apparel online; (4) demand for plus size apparel for among older customer; (5) difference in purchasing behavior between people who live in Bangkok and upcountry.

5.3 Apparel Issues for Male Plus Size

In this research, it only covers female sample which it not the only potential group of customer for plus size apparel. Male also play a big part of the potential customer. Therefore, it is a great opportunity to study male behavior of purchasing and difficulty of finding the apparel that fit. This information will help will help both manufacturing and retailer to understand more about their potential customer and creating more opportunity for their business. In order to study potential male customer, long interview will be able to gather information about their past experience regarding purchasing of plus size apparel which will be able to use to predict their future purchasing.

5.4 Development of Methodologies for Pattern Grading

Many participants mention that an apparel would fit in one part of their body but not another. Research needs to be conducted to find out which pattern will fit various body shapes. It should not be the same with standard grading in order to provide a variety fit for difference body type. A quantitative research design with a large sample size will be able to represent the majority of the population in Thailand. This method will be able to give an overall size reference and then the manufacturing and average it out and creating a size that will fit the majority of the potential plus size customers.

5.5 Plus Size Concerns with Purchasing Apparel Online

Participants mention that the reason that they still need to shop in store even though the price is more expensive than online shop is because they need to make sure that the apparel is fit by trying it on. Which mean that online shop cannot serve this need of the customer. Further research needs to find more information regarding what will make customer comfortable to purchase apparel online without physically trying on the apparel. This research should be conducted using online method such as sending our survey. This way it will be able to focus on the potential customer that live online.

5.6 Demand for Plus Size Apparel Among Older Customer

Since this research only study on participant that age between 25-40 years old. If future research able to study more on participant that age more than 40 years old, it might be able to discover the difference behavior. If the result come out that there are also demand for plus size apparel for customer who age more that 40 years old. It will create a good opportunity for the businesses because this group of customer have more spending and they are not much concern for the design of apparel.

5.7 Difference in Purchasing Behavior Between People Who Live in Bangkok and Upcountry.

In this research, only studies the demand and behavior of people who live in Bangkok which might have different behavior with people who live in upcountry. It will be a good opportunity for future research to study the difference to see which part of the country have more opportunity for the business to grow. When we know more about the population as a whole, you will be able to plan your business and apply the best operation within the different customer group.

5.8 Limitations

This research has some present limitation such as limited number of participant, area of participant and gender of participant.

Due to the limited time to conduct this research only ten participants were interviewed. With more participant, this research might be able to gather deeper information such as preference size, body sharp issue, and other competitor that have not discover in this research.

This research has conducted the interview with people who live in Bangkok only. This could bias the information about the spending and frequency of shopping. People who live outside of Bangkok might have difference preference of spending and how often they go shopping.

Lastly, all of the information in this research are only focus input from women. Therefore, the information might be difference if this research could be done with both male and female. Since, different gender has difference preference in term of size, style of clothes. More importantly they purchasing behavior is very different.

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