

# CONSUMER VIBES

## December 2013

Time to say goodbye to 2013 and It's now the last issue of Consumer Vibes of the year which concludes all hot events and news throughout this year from consumer's perspectives. The political turmoil seems to be the hottest topic in the past few month. Hope Thailand will recover from this turmoil soon. We wish everyone all the happiness and prosperity in the coming year.

In this issue, we particularly asked on the 'Brand of The Year' in various image attributes i.e. Brand perceived to be environment conscious, credible, innovative etc. This topic has been conducted for 4 years consecutively. Hence you can see the movement of those top brands. As usual, five selective categories were also checked on which brand has performed well for their recent marketing campaigns & ads in term of awareness, likeability, purchasing consideration and brand promoter score.

This wave of survey was conducted during 1-10 December, 2013. For its methodology, it is online survey via panelist which consists of 300 successful feedbacks from 3 provinces; Bangkok, Chiang Mai and Khon Kaen, with 100 respondents per region, and an equal split of males and females. We welcome for any additional queries and suggestions.

# Hot Issues in 2013

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45% Uncertainty in Southern Thailand



Jan - Mar



44% BKK Governor Election

23% Govt's Bill 2.2 trillion baht in loan for infrastructure



Apr - May

23% Uncertainty in Southern Thailand



Jun



17% the fluctuation of Gold prices, Stock and Currency rate



21% Uncertainty in Southern Thailand



Jul - Aug

59% Oil spill reached Samet Island

59% Nane Khum (Monk with inappropriate behavior)



65% Flood in many areas



Sep - Oct



21% Mae Wong Dam Project

HM the King's Birthday



Nov - Dec



Amnesty bills lead to anti-government protest campaign and Parliament dissolved

# Brands of The Year

This is the fourth year of "Brands of the Year" survey. We asked consumers about which brands, services, or organizations you think of when these image attributes are mentioned. Here are the brands they perceive for being...

## Environment Conscious



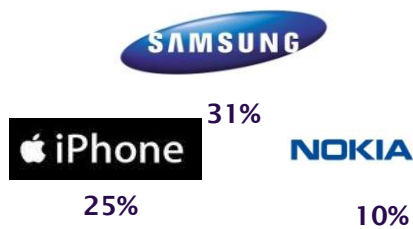
These 3 brands are in Top3 for 3 consecutive years

## Socially Responsible



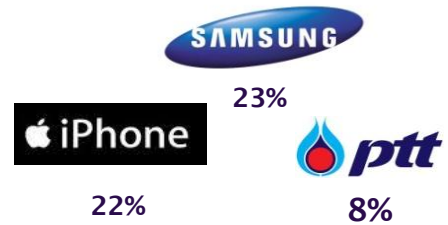
PTT has been perceived as being social responsible in top rank for 4 years. The rest 2 brands are in top 3 rank as same as last year.

## Innovative



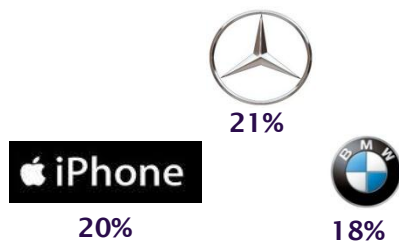
Samsung has successfully been perceived as innovative brand two years in a row followed by iPhone/Apple as same as last year.

## Internationally accepted



In this year, Samsung has taken over iPhone which was no.1 last year.

## Luxurious



Mercedes Benz remains no.1 throughout 4 years. Similarly, BMW's been in top rank for many years. iPhone is also in no.2 as same as last year.

## Credible



These 3 brands are in top rank as same as last year.

# Brand of The Year

## Friendly



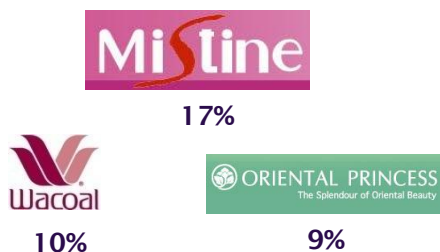
Ichitan remains no.1 as friendly brand. While Samsung, AIS and Dtac are the new comer in this aspect.

## Brand for men



AXE and Nivea have been in Top 3 rank for 4 years. Nike is the new comer in this year.

## Brand for women



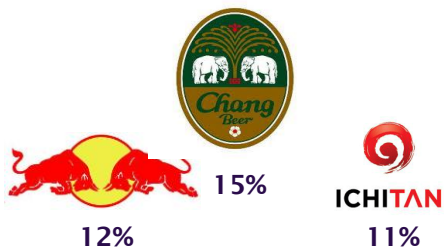
Mistine has remained as no.1 as brand for women for 3 years. Whereas Wacoal and Oriental Princess are 2<sup>nd</sup> and 3<sup>rd</sup> as same as last year.

## Brand for Teen



iPhone and Coke are still perceived as Brand for teen in top 3 rank as same as last year. Samsung is the new entry in category.

## Brand for Thai people



Chang and Red Bull still represent being 'Thai representative' in every round of survey. Ichitan is the new one perceived in this category.

- Samsung seems to be the hottest brands in this year as it's able to reach top 3 rank in different image attributes. This could be driven by their consistent brand presence, marketing activities and communication impact. While iPhone, the hottest brand last year, is facing the aggressiveness of Samsung.
- Similar to results last year, PTT is still perceived in the top rank in more than one image attributes.
- Other crucial brands in this year are Ichitan with its successful marketing communication could be a case study of building brand image and affinity among Thai consumers.

# Marketing activities & advertising

We have conducted online survey to check overall marketing activities and advertising recall from dynamic selected brands in different selective categories in each period. Respondents on the panel were asked to choose the most recalled brands on their marketing & advertising activities i.e. marketing campaign, advertising, sale promotion etc. regardless of contact channels

Q : Thinking of all marketing activities and advertising from (Selected categories) in the past 2 months, of which brand do you think most? (Brand choices provided and Single answer required)

They also have been asked to score (1-10) for their preference on those brands' mkt. activities& ad recalled, purchasing consideration and brand promoter level.

Q : After seeing the marketing activities from \_\_\_\_\_ (insert brand selected above), how much do you like it? (Likeability)

Q : How likely would you use/buy \_\_\_\_\_ (insert brand selected above)? (purchase consideration)

Q : How likely would you recommend \_\_\_\_\_ (insert brand selected above) to your friends/family? (brand promoter)

## Top marketing activities & advertising recalled

In this round, we selected these 5 categories to check consumer's voice ; Auto (Car/ Pick up/ SUV), Soft drink, Mobile phone network provider/ Wifi - High speed internet provider , Shampoo/Conditioner and Fast food/ Chain Restaurant. Top recall for each category goes to the following brands:-



34%



ไอ้ต้น

49%



40%



28%

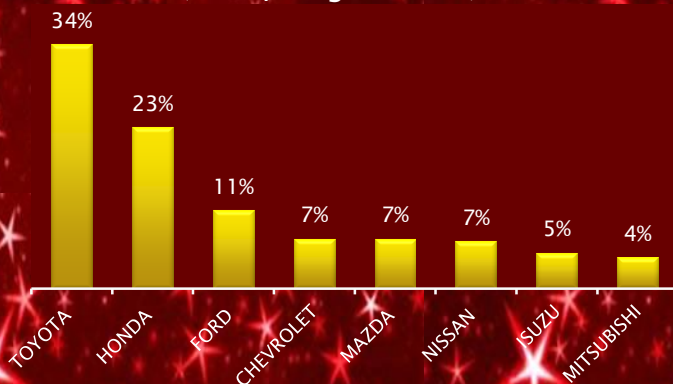


28%

Base: All 18-39 years old nationwide (N=300)

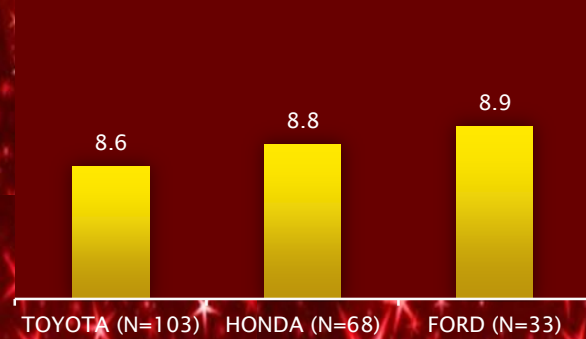
# Passenger Car/ Pick-up/ SUV MKT activities & Ad recall

MKT activities & Ad recall  
(Aided/ Single answer)

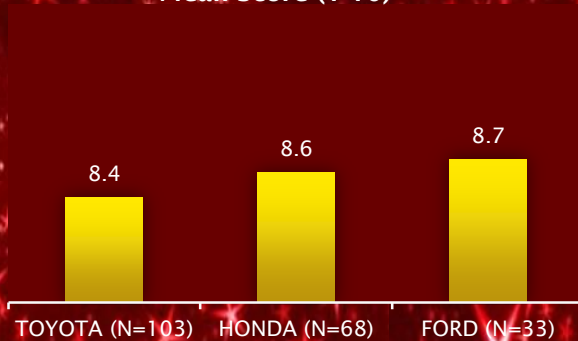


Base: All 18-39 years old nationwide (N=300)

Preference on MKT activities & Ad  
Mean Score (1-10)



Purchasing Consideration  
Mean Score (1-10)



Brand Promoter Score



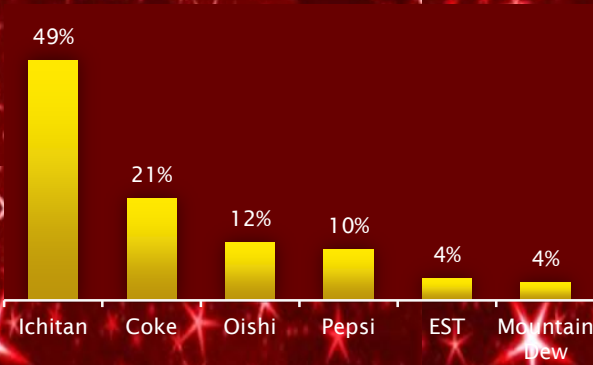
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- Toyota is still in top recall on MKT activities & ad, most likely from strong brand by itself and the heavy media investment. Similar to previous wave, Honda however marked better score for the rest of attributes surveyed; Likeability, Purchasing Consideration and Net Promoter Score.
- Ford is another brand recalled significantly in their MKT campaigns & ads above significant level (n~30). From three consecutive survey rounds, Ford has gradually improved in the mean score of Likeability & Purchasing Consideration and % Net Promoter Score which is even better than Toyota's.

(Net Promoter Score = % Promoter - % Detractor)

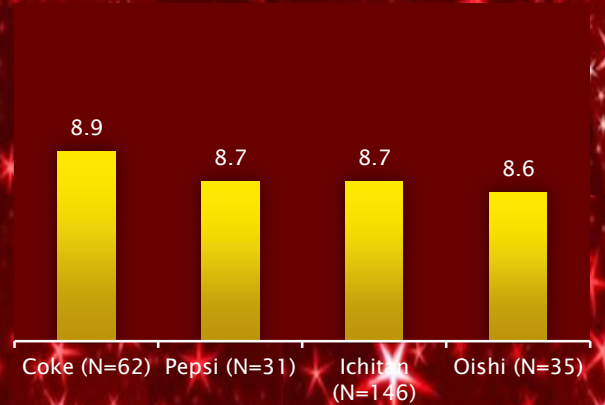
# RTD Beverage MKT activities & Ad recall

MKT activities & Ad recall  
(Aided/ Single answer)

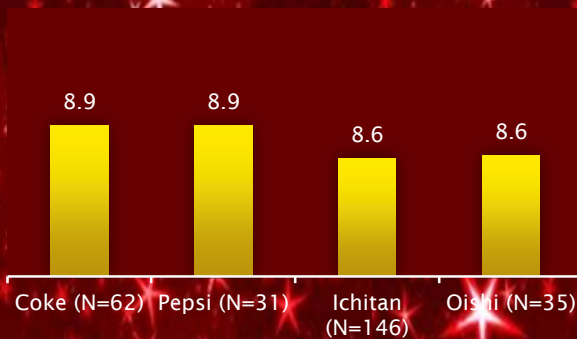


Base: All 18-39 years old nationwide (N=300)

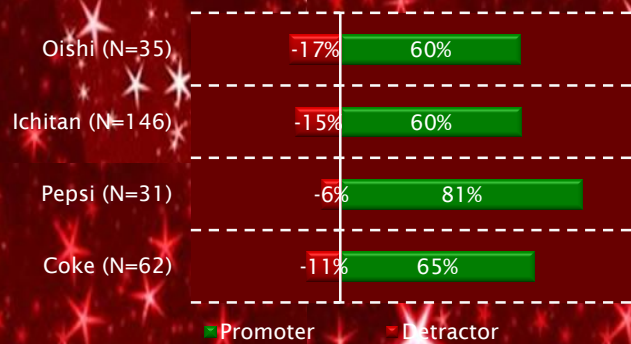
Preference on MKT activities & Ad  
Mean Score (1-10)



Purchasing Consideration  
Mean Score (1-10)



Brand Promoter Score



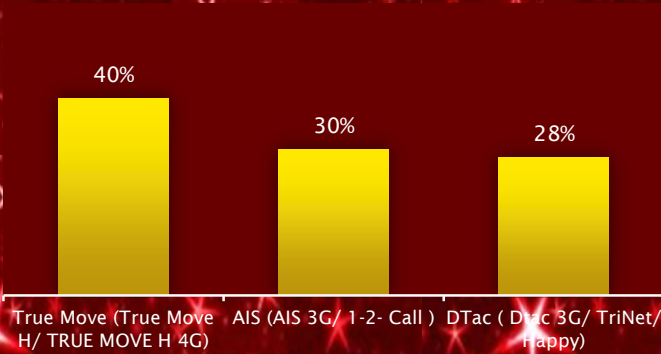
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- Although Ichitan still remains no.1 in MKT & ad recall resulted from consistent promotional campaigns. With ShareCoke campaign, Coke has gained highest mean score of Likeability and Purchasing consideration. Whereas Pepsi obtained highest Brand Promoter Score.

(Net Promoter Score = % Promoter - % Detractor)

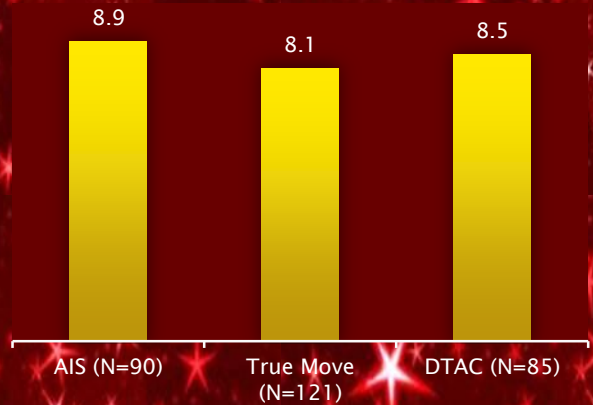
# Mobile Phone Network Provider MKT activities & Ad recall

MKT activities & Ad recall  
(Aided/ Single answer)

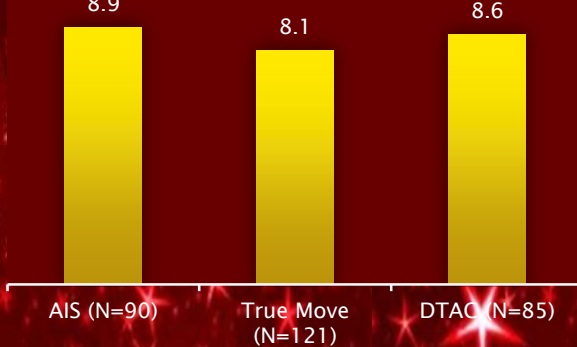


Base: All 18-39 years old nationwide (N=300)

Preference on MKT activities & Ad  
Mean Score (1-10)



Purchasing Consideration  
Mean Score (1-10)



Brand Promoter Score



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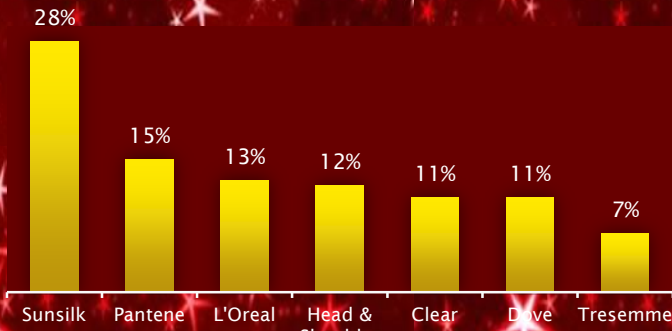
- For three waves consecutively, True Move still obtained highest % of MKT & ad recall. Again, True Move gained lower mean score of Purchasing consideration and Net Promoter Score compared to AIS & DTAC
- Compared to the past survey rounds, AIS has continually improved in the facet of campaign's preference. Moreover, those campaigns have convinced people to use and promoted AIS to others.

(Net Promoter Score = % Promoter - % Detractor)



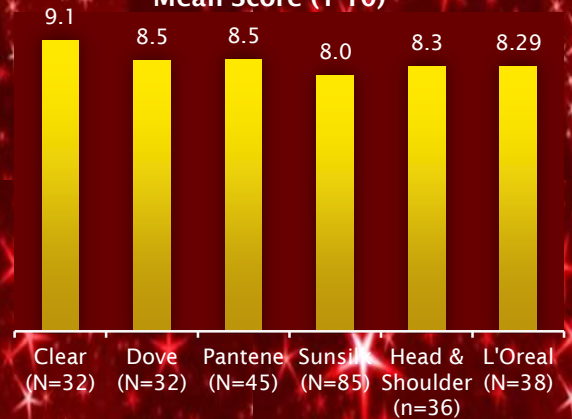
# Shampoo/ Conditioner MKT activities & Ad recall

MKT activities & Ad recall  
(Aided/ Single answer)

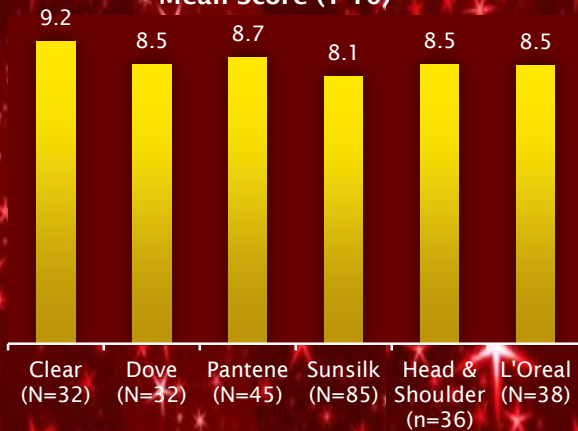


Base: All 18-39 years old nationwide (N=300)

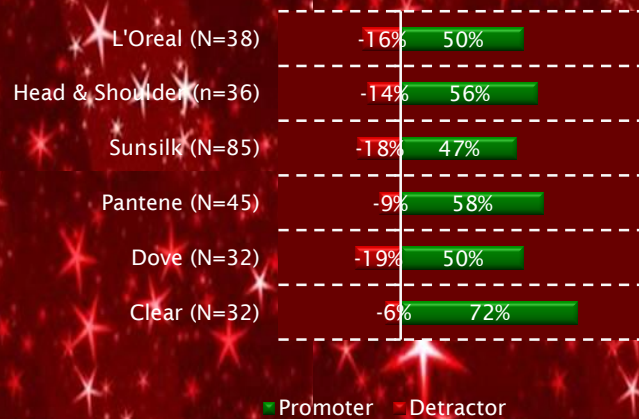
Preference on MKT activities & Ad  
Mean Score (1-10)



Purchasing Consideration  
Mean Score (1-10)



Brand Promoter Score



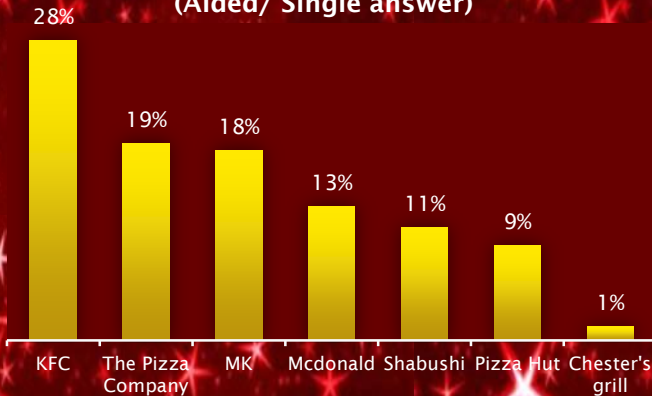
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- Sunsilk gained highest % of mkt & ad recall. However, Clear has performed better and improved since previous round as gaining higher score for the other aspects followed by Pantene and Dove.

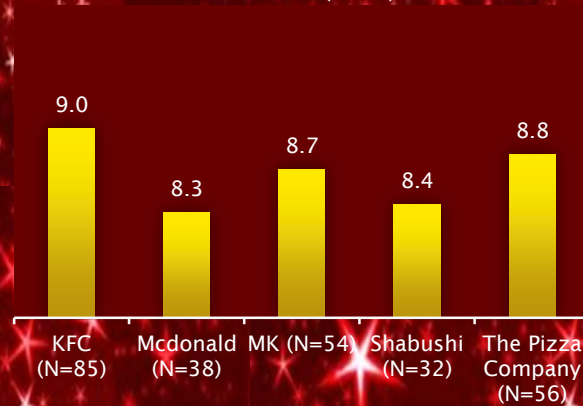
(Net Promoter Score = % Promoter - % Detractor)

# Fast food/ Chain Restaurant MKT activities & Ad recall

MKT activities & Ad recall  
(Aided/ Single answer)

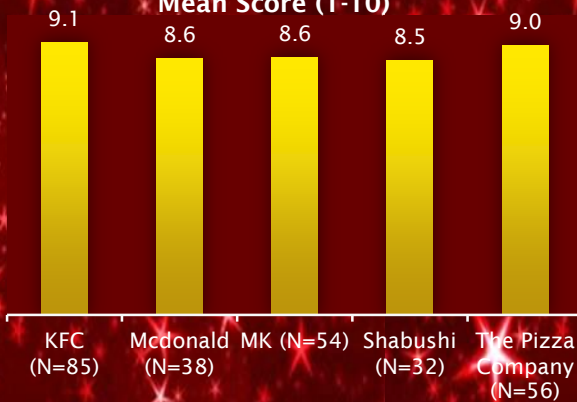


Preference on MKT activities & Ad  
Mean Score (1-10)

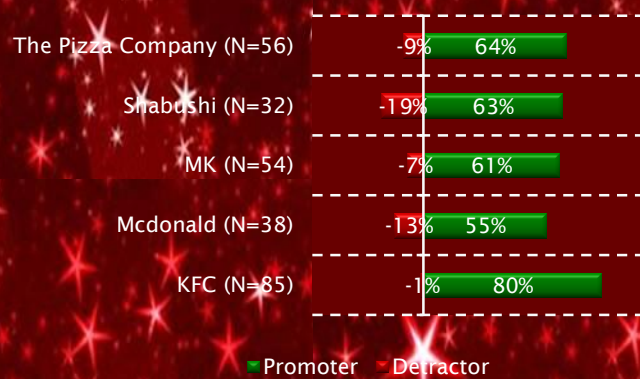


Base: All 18-39 years old nationwide (N=300)

Purchasing Consideration  
Mean Score (1-10)



Brand Promoter Score



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- KFC has won over all competitors in all aspect; campaign's awareness, likeability, purchasing consideration and brand promoter score, followed by The Pizza Company and MK.

(Net Promoter Score = % Promoter - % Detractor)

## About us

Millward Brown is one of the world's leading research agencies and is expert in effective advertising, marketing communications, media and brand equity research. Through the use of an integrated suite of validated research solutions - both qualitative and quantitative - Millward Brown helps clients build strong brands and services. Millward Brown has 82 offices in 52 countries. Additional practices include Millward Brown's Global Media Practice (media effectiveness unit), The Neuroscience Practice (using neuroscience to enhance traditional research techniques), Millward Brown Optimor (focused on helping clients maximize the returns on their brand and marketing investments), Dynamic Logic (the world leader in digital marketing effectiveness) and Firefly Millward Brown (a global qualitative research business). Millward Brown is part of Kantar, WPP's insight, information and consultancy group.

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Mindshare is a full-service marketing agency powered by imagination, technology, and best in class media services. We turn marketing challenges into business-building solutions by creating valuable consumer exchanges for brands. We believe in results, not rules.

Mindshare has a revolutionary structure that rejects and redefines the silos of past-generation media agencies. Our structure is simple by design yet capable of dealing with the most complex communications challenges. We base this structure on four key concepts that we believe are vital to any marketer's business: strategy, ideas, action and organization.

Our Business Planning team

### **"Ask and Answer the BIG Questions"**

and this is done through integration of analytics and solutions tools, consumer insights & communication planning.

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