

Synovate Hotspots

Thailand



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Bringing Thailand to life



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Introduction

- You may think you know Thailand if you've been there on holiday. But spending a week or two by the beach or sightseeing in Bangkok is a very different proposition to building brand success in this fascinating but also complex and ancient society.
- To help decode Thailand and her consumers, Synovate has produced this brief guide as a starting point for your successful commercial journey there.
- Our discussion has three main parts:
 - Five 'Big Ideas' - important insights that will help you better understand Thailand
 - Implications for research in Thailand
 - Data

The background is a solid teal color. On the left side, there are several abstract, overlapping shapes in a lighter shade of teal. These shapes include a large, curved, hook-like form at the top, a vertical bar extending downwards from its base, and a circular shape at the bottom left. The text is positioned to the right of these shapes.

**Section I:
5 Big Ideas**

5 Big Ideas

- Land of smiles
- “Face time”
- The King and Thais
- Beyond the city limits
- Holiday happenings

5 Big Ideas

- Land of smiles
- “Face time”
- The King and Thais
- Beyond the city limits
- Holiday happenings

ประติมากร
การนำโลหะจำพวกทองแ
รวมทั้งโลหะมีค่า เช่นเงินหรือทอง
เกิดเป็นประติมากร
หรือเทวรูป และเครื่องประดับตกแต่ง
นับเป็นเทศ
ที่ได้ถ่ายทอดจากรุ่นสู่



มรดกล้ำค่าแห่งความเป็นไทย.....ให้โลกรู้ว่าเมืองไทยมีดี

Land of smiles



Land of smiles

As soon as you arrive in Thailand, you will be struck by the warm welcome you receive. People smile often, speak softly and courteously to each other, and seem to go out of their way to make guests feel comfortable. The smiles are not just for tourists. Even in their work environment, Thais are likely to punctuate their communication in this way.

In Thailand the culture of sanook (fun) permeates every aspect of life, no matter how serious the context. The recent coup presented a uniquely Thai example of this. Flowers were used to decorate tanks, scantily dressed dancers performed for soldiers and even tourists took advantage of photo opportunities by posing with soldiers and their military hardware.



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Land of smiles

So how does sanook manifest itself in the world of the Thai consumer? Most Thai TV advertising tends to be humorous and light hearted. Indeed, Thailand wins more regional creative awards for advertising than any other country in Asia.

When it comes to asking consumers how they feel about new products and marketing concepts, Thais tend to rate new products very highly. Market researchers have to recalibrate Thai rating scales when comparing results with other countries in order to get a more realistic view of public reaction.



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Land of smiles

Thailand's gracious and friendly culture is at least partially rooted in its religion. Thailand is overwhelmingly Buddhist and Buddhist tenets of compassion and serenity form the core of the country's social values. Above all, Thais value 'getting along' and forgiveness and compromise as means to avoid confrontation.

Thailand's warm culture has proved to be a bankable asset for the country, with tourism accounting for more than seven per cent of the country's total gross domestic product. Thailand's unique culture has also spurred the development of other service industries, notably health care. More and more foreigners are travelling to Thailand to receive world-class medical attention in resort-like facilities - all at prices which compare very favourably to the U.S. or Europe.



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Land of smiles

But a relaxed and positive Thai attitude doesn't mean that companies can compromise on the quality of what they deliver to the local consumer. While it takes a lot to bring a Thai's anger to the surface, once deeply upset they're prepared to show it. A car manufacturer realised this recently to its cost when an unhappy customer who'd had repeated problems with his new sport utility vehicle, parked it outside the company's office, invited the press along, and then took a sledge hammer to it, demanding a replacement there and then. The car maker obliged, leading to a wave of copycat demonstrations by other customers who also felt short-changed by the standard of after-sales service they were receiving.

Land of smiles



Land of smiles



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Face time



'Face time'

Thais strive to blend in with and be accepted by their friends, colleagues, and neighbours. They care a lot about what others think of them and they will go out of their way to buy products and brands that help them gain acceptance from others. Thais are likely to want to stick to the 'safe' or accepted market leader – a potentially significant challenge to a new market entrant.

New brands face a long and arduous battle to gain mass acceptance, irrespective of whether their product is actually considered to be better than what's already on the shelves.



'Face time'

One of the ways marketers can differentiate their products is by developing a personal connection with the consumer – putting a “face” to their brand or company. Personal relationships act as both binding agent and lubricant for Thai society and Thai business. Thais will always prefer doing business with someone they know, over a faceless corporate entity.

In some cases, the relationship between vendor and customer can be more important than the product or service itself! Your local mechanic may stock a particular brand of engine oil even if he thinks other brands deliver superior performance. The reason is his strong relationship with someone at the distribution company, who's paid frequent personal visits to his store in order to keep him happy.



'Face time'

Some of what makes personal relationships important in Thailand is the principle of kreng-jai or consideration for other's feelings. If someone has done you many favours or has a long standing relationship with you, one should be careful to avoid offense or hurt feelings.

For example, if a department store has a stall offering free samples of food or drink, Thais who try the samples will tend to buy the product out of kreng-jai even if they don't particularly want the product.



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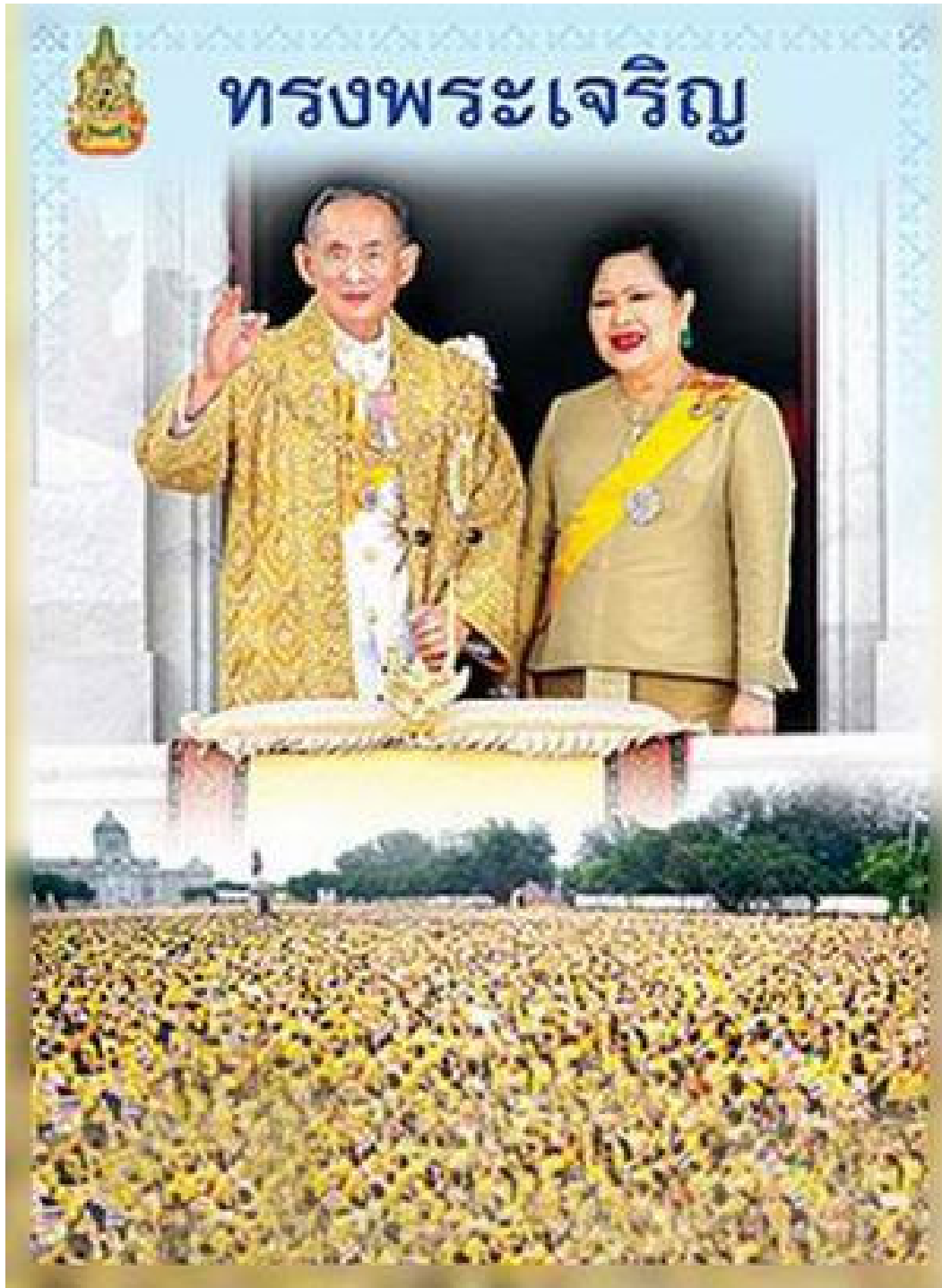
'Face time'

Thais not only want to have a personal relationship with their retailer – they want to have a personal relationship with the brands they buy. In developed countries, this might be accomplished through advertising and indeed Thai advertising tends to focus on the group, with an emphasis on the relationships which bind friends, lovers, and families together.

In Thailand, people are looking for more direct interaction. Cable TV companies hold family fun days, while consumer electronics companies sponsor karaoke contests and fashion shows. It is important for the Thai consumer to have sanook with your company and your product – to put a face to your brand!

5 Big Ideas

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The King and Thais



The King and Thais

Thailand is one of the few monarchies in Asia and the connection between the people and King Bhumibol is unique in the world. The King is seen as more than a ruler. He is regarded by Thais as 'father,' the people's protector and the government's conscience.

When the King was recently admitted to the hospital for an operation, hundreds of thousands of his subjects signed get-well cards and thousands more marched across the country to show their support. Millions more will celebrate every Monday (the day of the week the King was born) in the King's Diamond Jubilee year by wearing a shirt coloured in the royal yellow.



The King and Thais

King Bhumibol affects people's day to day lives in many ways. While his official role in government is ceremonial, the King has famously intervened in the name of the people many times during political crises. His philosophy of self-sufficiency for everyone regarding their personal finances is something he has been promoting for 30 years.

Now it has made an impact on public policy at central government level, as well as influencing Thais' personal spending habits. This spirit of self sufficiency is also promoted in the King's charity work, done through the Royal Foundations.

The Doi Tung Foundation, for example, has set up programmes in Thai villages to produce handicrafts for sale domestically and abroad.



The King and Thais

While it may seem tempting for brands entering the Thai market to associate themselves with the Royal Family and surf the wave of their popularity, in practice this is extremely unwise and locals are likely to take grave offence. In any case, any company wishing to link itself to the monarchy must first submit the proposal to the Bureau of the Royal Household for scrutiny and adjudication..

As well as being loyal to the monarchy, Thais are extremely patriotic. Many Thai brands, from beer to petrol, capitalise on this patriotism in the way they present themselves to the general public, promoting the message that buying a particular product will help the country as a whole.

The King and Thais



The King and Thais



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Beyond the city limits



Beyond the city limits

Foreign companies looking to enter the Thai market have generally focused on the growing middle and upper classes in large urban centres, particularly Bangkok. At first glance, this seems like a sensible strategy. Of the 65 million people living in Thailand, just over 10 per cent live in Bangkok, and the capital city represents a disproportionate share of the country's wealth.

It is important, however, to remember the huge opportunities for brand growth across a range of categories in Thailand's less developed areas. The "up-country" markets may be urban or rural but all have experienced relatively low exposure to marketing and brand development.



Beyond the city limits

In these areas, although household incomes may be lower than the big cities, so is the cost of living. As a result, locals have level of disposable income that makes them attractive to brand owners.

Tapping into the mass market may mean shifting one's perception of what a Thai 'consumer product' is. Cement for example, is generally a business-to-business sale in Western countries. But in up-country Thailand, where individuals build their own homes, cement is a branded consumer product.



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Beyond the city limits

Several traditionally 'working class' brands have actually been successful by focusing first on up-country markets. An example in a drinks category is the Seagram brand 100 Pipers Whisky, which chose to avoid the over-crowded luxury end of the market and initially built its business by appealing to the up-country working class.

Once its position in the lower end of the market was established, it was able successfully to break into the higher end, positioned as the “honest man’s” brand. The message appealed to affluent Thais turned off by perceptions that some high end brand marketing was pretentious.

Beyond the city limits



Beyond the city limits



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Holiday happenings



Holiday happenings

Holiday time is family time in most cultures, and Thais are no exception. Returning to the bosom of the family for holidays is an ingrained ritual. The exodus of Thai city dwellers to their home villages every holiday weekend is a phenomenon that has major implications for almost all marketers and retailers.

It is estimated that 68 per cent of Bangkok residents leave the city to be with family during national holidays.



Holiday happenings

Every one of these travellers will be loaded down with gifts for relatives, and some of the offerings, such as new kitchen appliances, represent a significant investment.

Prior to peak travel periods, there's a surge in sales of items such as blankets, electronics, cold weather clothes and gift baskets.

During holiday weekends Bangkok becomes a quiet place, while the sleepy up-country areas wake up to rounds of hectic socialising and homes festooned with coloured lights and paper decorations.



Holiday happenings

Alcohol sales also experience this power surge in up country regions. By contrast, at such times department stores in Bangkok usually record some of their lowest trading volumes of the year. Many multinational brand owners follow their customers up country during these times and stage large promotions and event sponsorships at temple festivals, school fairs and political party social events. This type of holiday presence is particularly important for beer, cigarette, alcohol, automotive and fast moving consumer goods manufacturers.

Holiday happenings



Holiday happenings





**Section II:
Implications for
research**

Interview methodologies

Door-to-door

Face-to-face interviews are the most common data-collection method, particularly in areas with low telephone penetration. Interviews should be conducted before 8pm, as any later would be considered intrusive. Lower-income groups can readily be interviewed face-to-face. For affluent audiences, telephone interviewing is more effective.



Interview methodologies

Telephone

Telephone calls are relatively inexpensive within a city or province, but can be costly when calling inter-province. Sometimes it's cheaper for Bangkok residents to call Singapore than to up-country areas. Mobile users significantly outnumber landline users (34 million vs 6.8 million).

Costs for fixed or landline calls are still substantially lower than mobile calls, but the gap is narrowing. Mobile-network operators do not provide subscriber lists, so contact has to be made either by random digit dialling (RDD) or from customer lists supplied by the client.

Calls to mobile numbers are often not picked up by the owner if an unrecognised number appears on his/her handset.

Interview methodologies

Telephone

Computer-aided telephone interviewing (CATI) is widespread.

Calls should be kept under 20 minutes both for business-to-consumer (B2C) and business-to-business (B2B).

Longer interviews are possible, but the success rate, cost and quality will be dramatically affected.

Longer B2B telephone surveys ideally require an appointment.

Interviews should have a pre-scripted introduction explaining the purpose; otherwise many prospective interviewees will assume it is a sales or telemarketing call and hang up.

Interview methodologies

Central location tests (CLT)

CLT is used for taste, sniff and shelf tests, and advertising testing.

Recruitment for CLT can either be conducted on the spot (street intercept) or by pre-recruitment of qualified respondents.

Between 40 and 50 interviews can be achieved per location per day, depending on such factors as length of interview and degree of pre-recruitment.



Interview methodologies

Focus groups

Focus groups can be conducted anywhere in Thailand, depending on the type of respondents being targeted. Typically, up to eight respondents participate (or four for mini groups).

Focus groups for affluent respondents should be held in luxury hotels. Lower-income earners will feel more comfortable in standard ones. Moderators in Thailand face two key problems – overclaiming by consumers, and lack of articulation on some topics. The latter is partly due to the Thai language's lack of descriptive words compared with English.



Interview methodologies

Focus groups

Respondents should be asked to bring their national ID cards to help screen out professional respondents.

Important considerations are:

- To the dismay of clients, attendees frequently arrive after the scheduled start time, especially when it is raining.
- Traffic congestion in the capital can affect starting times and turnout. Upcountry areas can have an overly relaxed attitude to timekeeping and punctuality.
- Serve snacks to all groups before the interview starts and provide respondents with an incentive.
- To ensure attendance, respondents are often escorted by the recruiter to the venue.
- Held at any time throughout the day on weekdays and occasionally weekends, it is unusual for groups to finish later than 8pm.

Interview methodologies

In-depth interviews

These are useful for difficult-to-reach respondents and allow for deeper insights.

They can be held at a time and place convenient for the respondent.

Mystery shopping

With the increasing size and number of shopping malls in major cities and the growth of hypermarkets nationally, mystery shopping is increasingly popular.

Once trained, mystery shoppers can provide a quick and effective way to evaluate a store or site, especially when combined with mobile phone 'call backs.'

Interview methodologies

Interactive voice response (IVR)

A pioneer in deploying IVR in Thailand, Synovate runs several projects using Synovate ViewsCast.

IVR allows for near-instant feedback from a survey and helps clients to react if issues are identified.

IVR can also be used in combination with mystery shopping.



Interview methodologies

Ethnographic studies

This exploratory and real-life approach is increasingly popular in Thailand.

Its success owes much to the openness and friendliness of Thais, the ease of access to their homes, and their willingness to spend long hours with researchers.

Accompanied shopping, home visits and guerrilla interviewing are useful for gaining insights into the emotional reasons for decision-making.

Ethnography may involve socialising with target audiences during evenings and weekends.

Interview methodologies

Ethnographic studies

Points to note include:

- Researchers should dress to make the target group feel comfortable, ie, for young people, jeans; for lower-income subjects, slightly worn-out clothes.
- Developing a rapport with consumers will allow you to watch and listen without encroaching.
- Judging when video recording is acceptable once rapport has been achieved.
- Deciding when to use other research techniques such as diaries, photo collages and homework tasks to gain richer insights.
- Considering shop-alongs for an understanding of consumer habits.

Interview methodologies

Online

Online surveys are still limited due to low Internet penetration.

They typically work well with elites, decision makers and/or corporate surveys, where respondents are Internet savvy.

Ethnic and religious groups

The Chinese are Thailand's largest ethnic-minority group, representing 14 per cent of the population. Muslims, concentrated mainly in the south, account for 4.6 per cent. A further 6.4 per cent come from other ethnic groups, tourists, expatriate residents with work permits, and retirees.

Buddhism is the predominant religion (94.6 per cent).

Questionnaires

Questionnaires are a complex area of research planning and raise many issues including:

- Language
- Length
- Subject matter
- Audience
- Coverage
- Timing
- Schedules



Language

Some English words and expressions do not have Thai equivalents and should be translated carefully.

Words can be translated in very different ways but have similar meanings.

Although literacy rates are high (95 per cent based on those aged 15 and older), be aware that many older adults in rural areas will not be able to read a show card.

Mock interviews should be conducted after every briefing session to ensure that all interviewers understand what can happen in the field and how to deal with queries.



Length

Interviews conducted in English typically take 50 per cent longer than those in Thai.

Though partly due to the language, this mainly arises from the fact that Thais spend more time considering each response.

- Guidelines for face-to-face interviews are: door-to-door, up to 60 minutes; CLT, up to 45 minutes; street intercepts, up to 15 minutes; business, up to 30 minutes; focus groups, up to 120 minutes; in-depth interviews, up to 60 minutes.
- Guidelines for telephone interviews are: households, up to 40 minutes; business, up to 25 minutes.

Length

- Guidelines for IVR telephone interviews are: households and business, up to 7 minutes.
- Guidelines for online interviews are: consumer, up to 10 minutes; business, up to 15 minutes.
- Online access is centred on the capital.

Subject matter

There are few subjects of special concern in Thai society.

King Bhumipol Adulyadej should not be mentioned with any negative connotation.

The upper classes tend to underclaim income, the lower classes tend to overclaim.

Questions on attitudes to the media and to politics are not well received, especially when the research is for public disclosure.

Audience

Respondents are typically segmented by monthly household income rather than annual income.

Bangkokians earn more than people in the rest of the country, so research should be adjusted to account for this.

The standard definition of a C socioeconomic group's household monthly income is Baht 20,000 in Greater Bangkok and Baht 10,000 up-country.

From a labour force of 35 million, half are employed within primary industries.

Poverty is estimated to affect 10 per cent of the 64.6 million population.

Coverage

Thailand is researched as two territories— Greater Bangkok and up-country. Most affluent people live in Greater Bangkok.

Up-country refers to the rest of the nation, and the regions there differ widely.

Due to the diversity of the provinces, coverage must be carefully reviewed as findings from the same product or concept can vary greatly across regions and income groups.

Coverage

The following provinces are usually researched to represent each of the upcountry regions:

North	– Chiang Mai
North East	– Nakhon Ratchasima (alternate name: Korat)
	– Khon Kaen
East	– Chonburi
South	– Had Yai
	– Nakom Srithamma
	– Surat Thani
Central	– Bangkok



Timing

Despite relatively good infrastructure, Thailand's tropical climate occasionally leads to flooding during the rainy season, making interviewing impossible in many areas then.

Schedules

Thailand enjoys a relatively high number of public holidays compared with other countries.

Schedules

Public Holidays

- **Jan** New Year's Day
- **Mar** Makha Bucha Day
- **Apr** Chakri Memorial Day
- **Apr** Songkran Festival
- **1 May** National Labour Day
- **May** Coronation Day
- **May** Visakha Bucha Day
- **Jul** Asarnha Bucha Day
- **12 Aug** H.M. the Queen's Birthday
- **Oct** Chulalongkorn Day
- **5 Dec** H.M. the King's Birthday
- **10 Dec** Constitution Day
- **31 Dec** New Year's Eve

Schedules

Avoid scheduling research in the week before or the week after The Songkran Festival. Many people also take time off either side of the official New Year holiday dates.

If an election is scheduled to take place, be aware that this requires residents to return to their birthplace to vote.

Please note, additional national holidays are sometimes announced without notice.

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Section III: Data

Sources



This data is assembled from a Synovate telephone survey of a representative sample of adults in Greater Bangkok, conducted in April 2006.

It is supplemented with some basic country facts, as well as economic, population and communications data from the Central Intelligence Agency's World Factbook.

Basic country facts

- Population: 64,631,595 (July 2006)
- Rank in world by population: #19
- Median age: 31.9 years
- Adult literacy rate: 93%
- Area total: 514,000 sq km
- Rank in world by area: #51



Economy 2006

- GDP (official exchange rate): 183.9 billion (US\$)
- GDP per capita: 2,845 (US\$)
- GDP real growth rate: 4.5%
- Exports: 105.8 billion (US\$)
- Current account balance:
-3.7 billion (US\$)



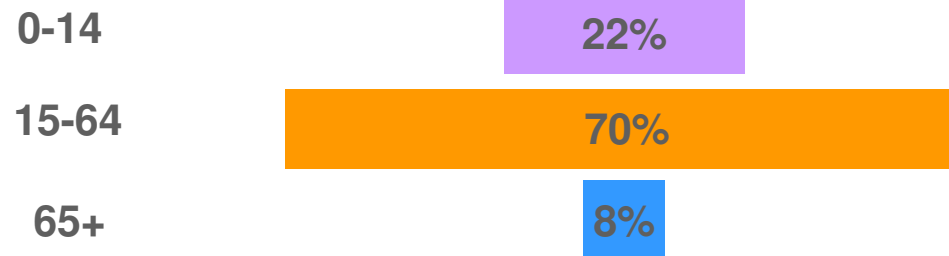


Population



Communications

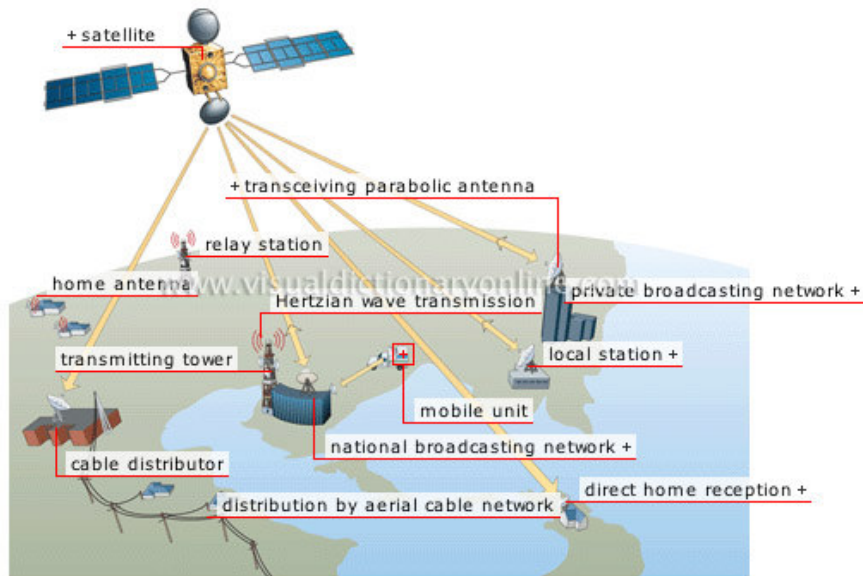
Population distribution by age (2005)



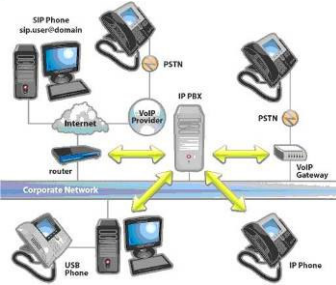
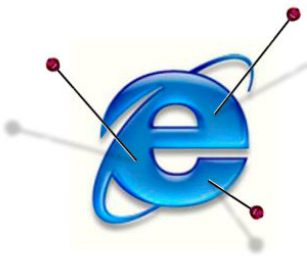
Communications (2005)

- Telephone – landlines: 7.0 million
- Telephone – mobile: 27.4 million
- TV broadcast stations: 111
- Internet users: 8.4 million





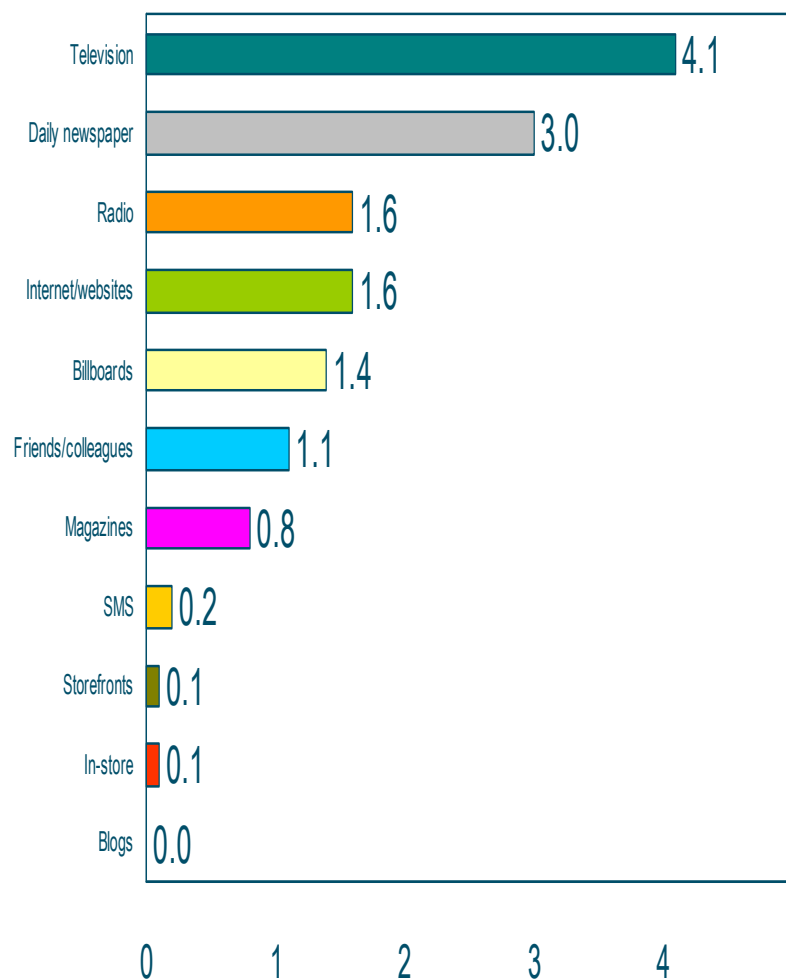
Media



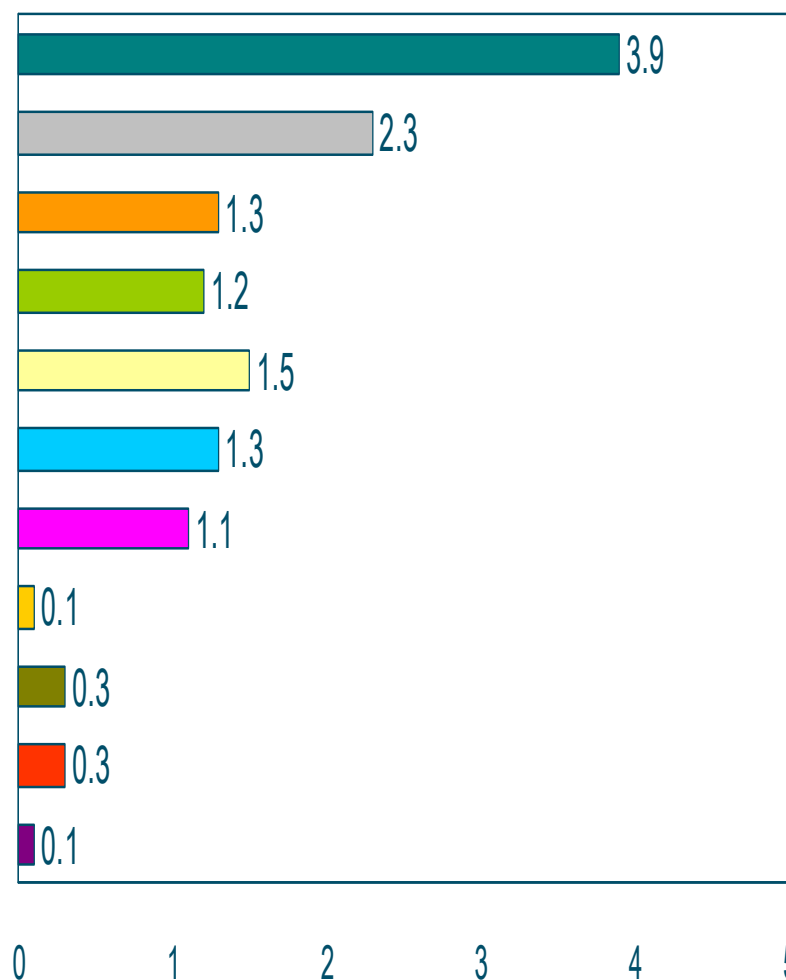


Most important media sources (5= Most important)

Most Important For News



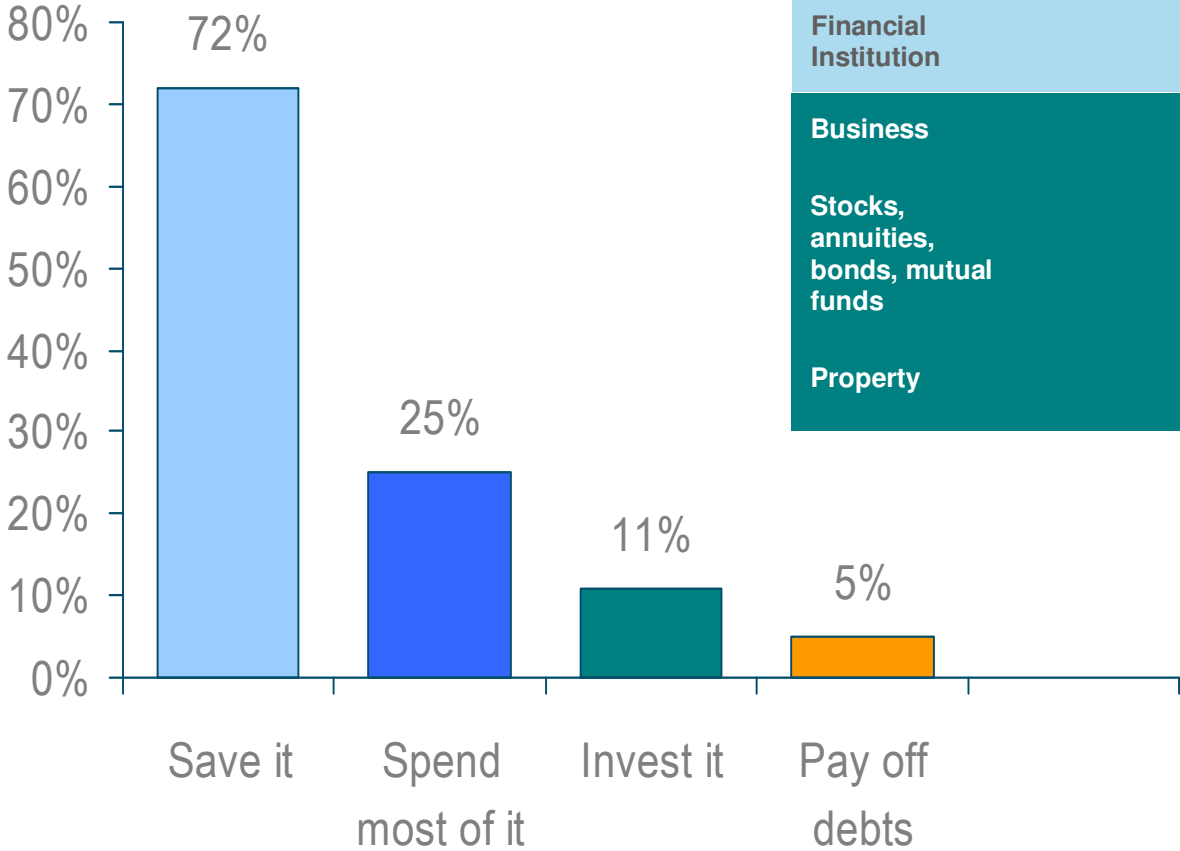
Most Important For Product Information





Income

What would you do with 20% more household income?



Bank	90%
Insurance company	5%
At home	4%
Financial Institution	3%
Business	52%
Stocks, annuities, bonds, mutual funds	23%
Property	18%

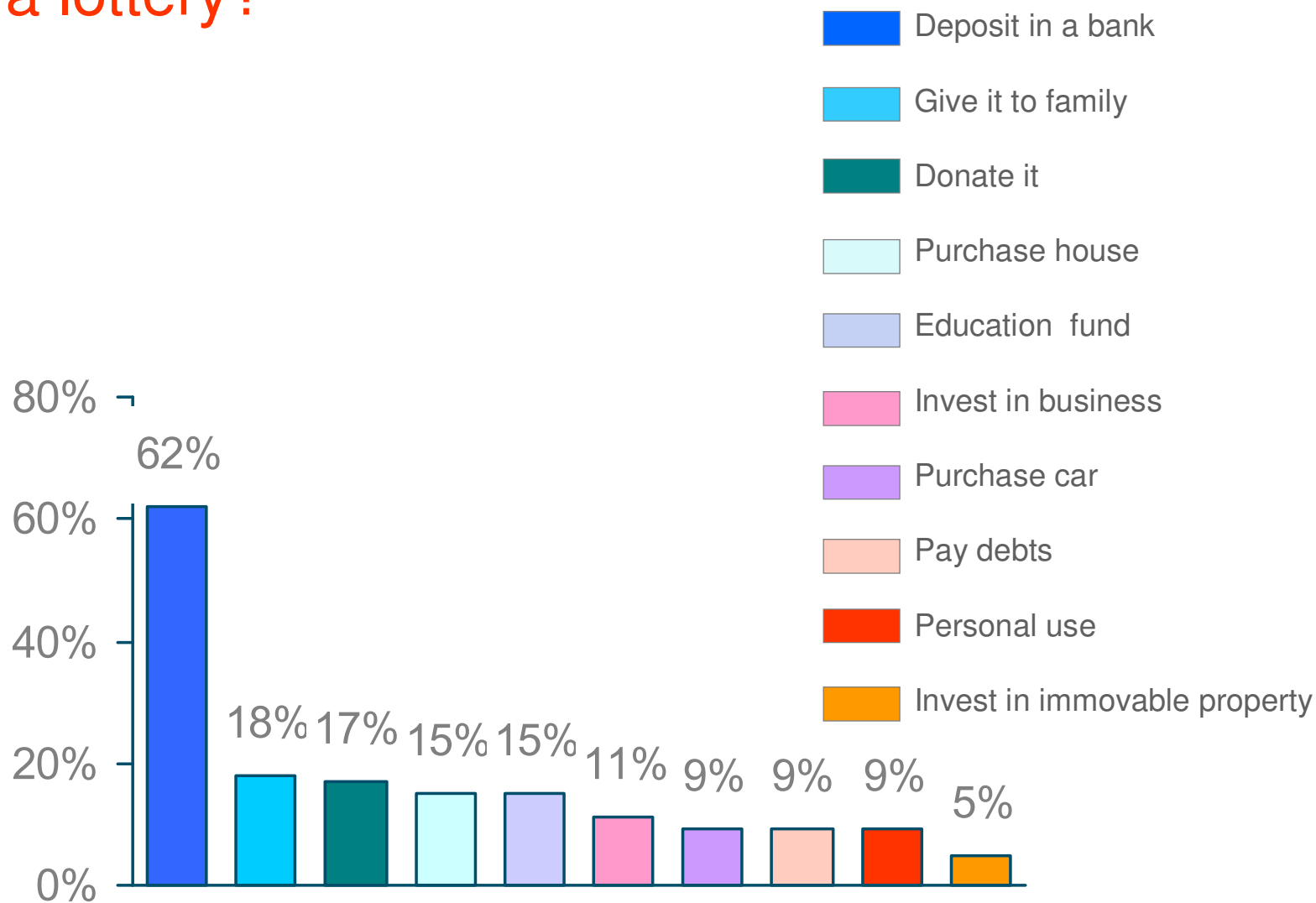
Better/more food	42%
Home durables	40%
Clothing	29%
Education	13%
Consumer products	11%
Electronics	11%
Entertainment	11%
Car	9%
Healthcare	9%
Holidays	7%
Home furnishings	5%
Jewelry	5%



Won
US\$100,000
in a lottery



What would you do if you won US\$100,000 in a lottery?



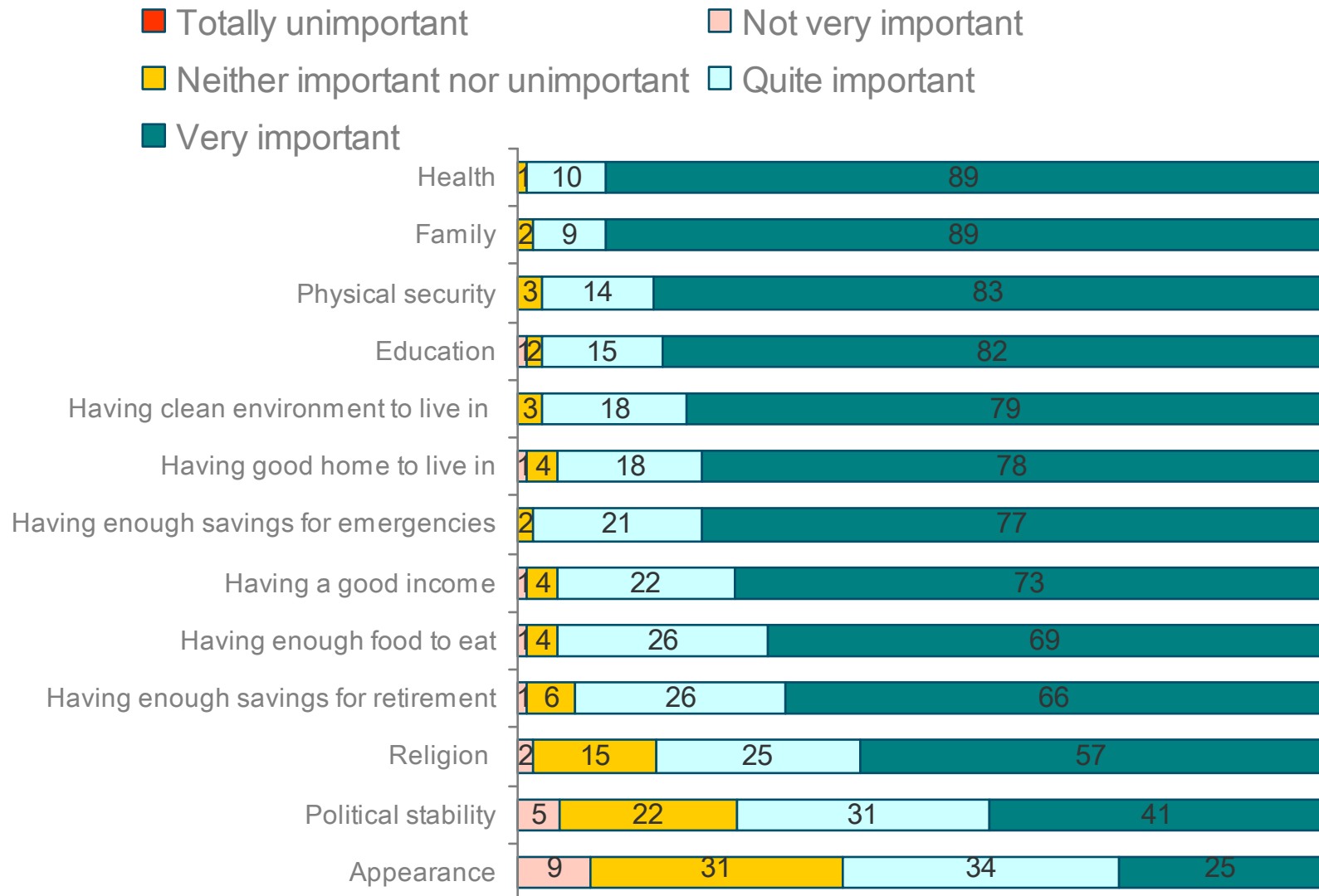


Lifestyle



protecting your family

Lifestyle personal importance (numbers in percent)

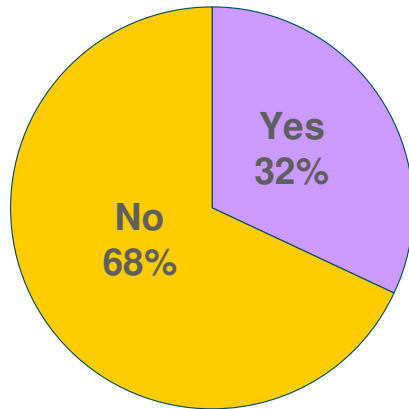




Cyberspace

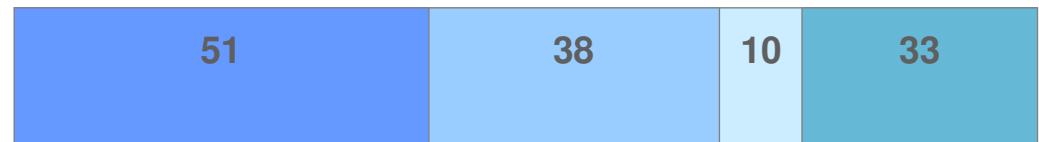
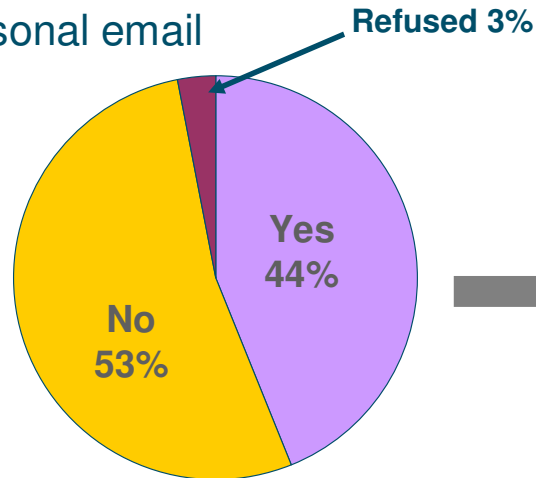
Cyberspace

Internet access



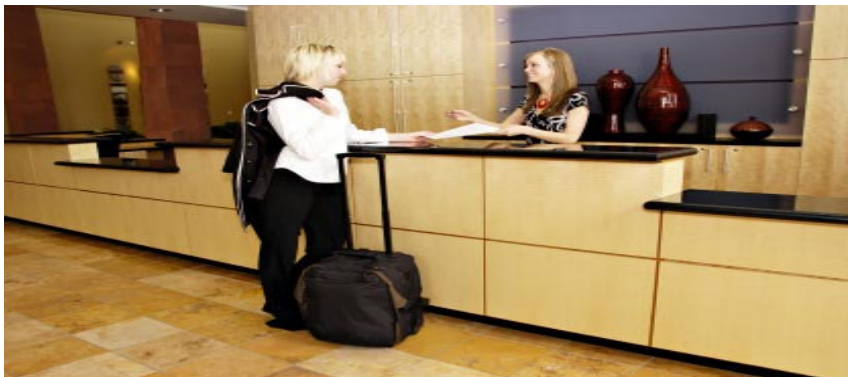
- Both home and office
- Home only
- Office only
- Others

Personal email












Products and services






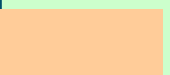
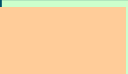
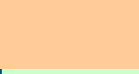
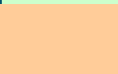




Products and services – usage during past three months and brand image



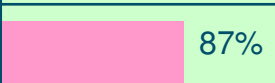
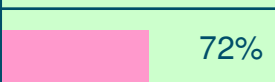
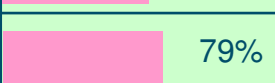
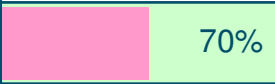
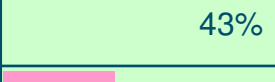

	Used past 3 months	Best Brand	2nd Brand	3rd Brand
Travel				
Hotel Group	 29%	Oriental Hotel	Sofitel	Dusit Hotel
Airline	 14%	Thai Airways	Singapore Airlines	Nok Air/Japan Airlines
Alcohol				
Beer	 37%	Heineken	Singha	Leo
Whiskey/Scotch	 17%	Johnny Walker	Chivas	100 Pipers
Brandy/Cognac	 7%	Regency	Hennessy	XO
Red wine	 10%	French	Thai	Australian
White wine	 5%	French	Australian	German/Italian

Products and services – usage during past three months and brand image

	Used past 3 months	Best Brand	2nd Brand	3rd Brand
Soft Drinks				
Fruit Juice	 75%	Tipco	Malee	Unif
RTD Tea	 60%	Lipton Ice Tea	Oishi	Unif
RTD Coffee	 67%	Nescafé	Birdy	-
Cola	 80%	Pepsi	Coca Cola	-
Lemonade	 29%	Schweppes/Fanta	-	-
Auto				
Fuel for your car/ motorcycle	 64%	PTT	Shell	JET
Motorcycle	 43%	Honda	Yamaha	Suzuki
Car/Pick-up Truck/ SUV	 51%	Toyota	Isuzu	Honda
Lubricant for your car/motorcycle	 43%	shell	Castrol	PTT



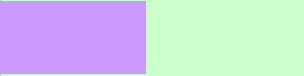
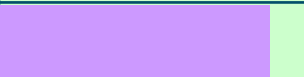

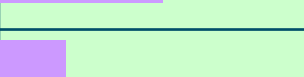


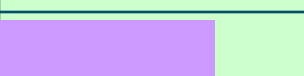



Products and services – usage during past three months and brand image

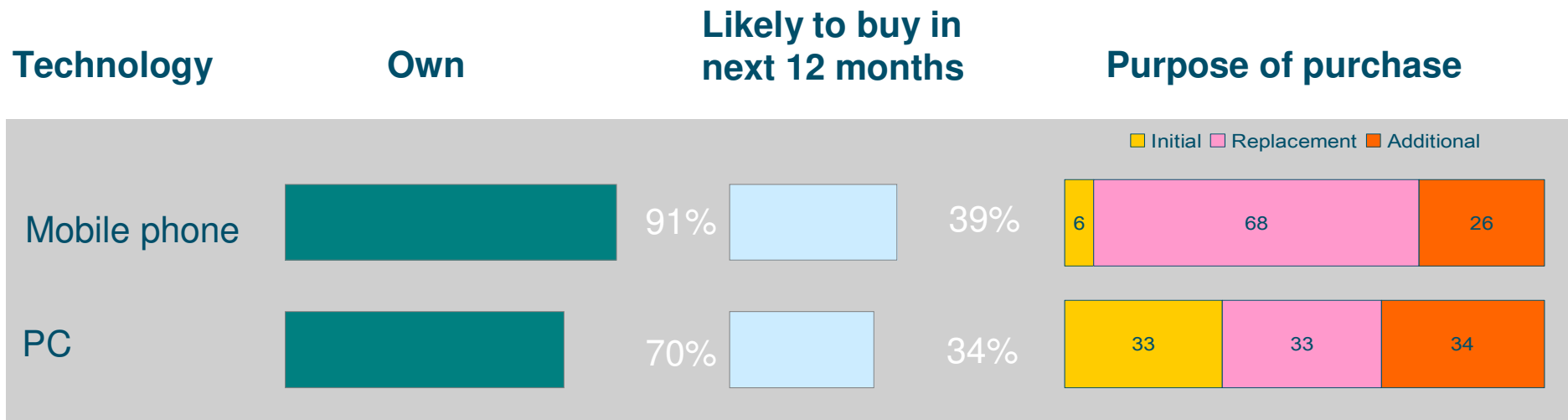
	Used past 3 months	Best Brand	2nd Brand	3rd Brand
Retail				
Everyday clothing store	 58%	AllZ	Jaspal	Lacoste
Designer clothing store	 22%	Armani	Diesel/Dior	Louis Vuitton
Convenience store	 87%	7-Eleven	Tesco Express	Family Mart
Fast food chain	 72%	Kentucky Fried Chicken	McDonald's	MK
Grocery	 79%	Tesco Lotus	Carrefour	TOP's/ Big C
Technology				
Mobile phones	 70%	Nokia	Samsung/Sony Ericsson	Motorola
MP3 player	 43%	Sony	Panasonic	Apple
Large screen/Flat TV	 47%	Sony	Samsung	Panasonic

Products and services – usage during past three months and brand image

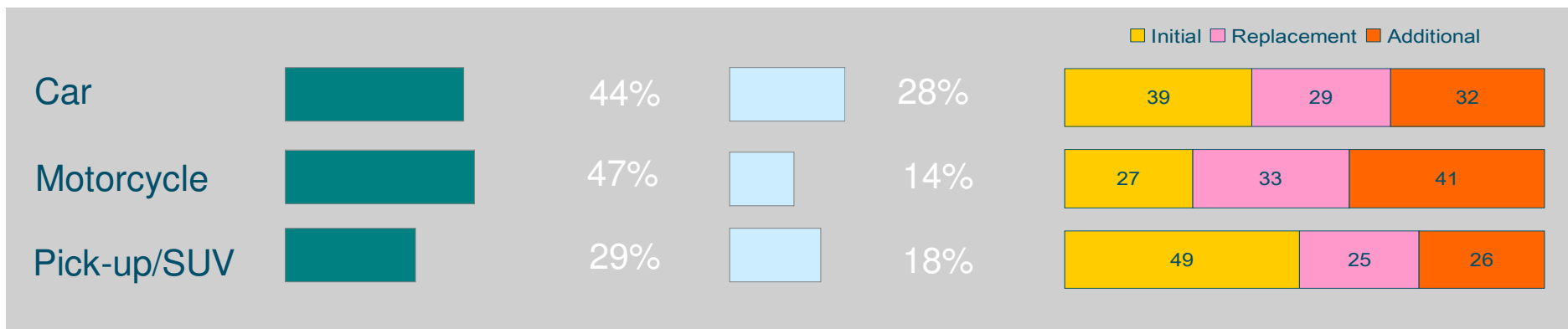


	Used past 3 months	Best Brand	2nd Brand	3rd Brand
Personal Care				
Soap	 97%	Lux	Protex	Safeguard
Shampoo	 99%	Sunsilk	Pantene	Clinic
Lipstick	 36%	Misteen	Shiseido	Pias
Conditioner	 80%	Sunsilk	Pantene	Dove
Face powder	 47%	Avon	Pan Cosmetic	Clarins/ Neutrogena
Eye make-up	 22%	Avon/Shiseido	Maybelline New York/ Amway/Covermark/Pias	Lancôme/Giffarine
Face make-up	 29%	Shiseido	Pias	Christian Dior/ Amway
Facial moisturiser	 62%	Nivea	Olay/Pond's	Amway
Shower Gel	 55%	Lux	Shokubutsu	Dove
Facial cleanser	 58%	Pond's	Nivea	Johnson & Johnson

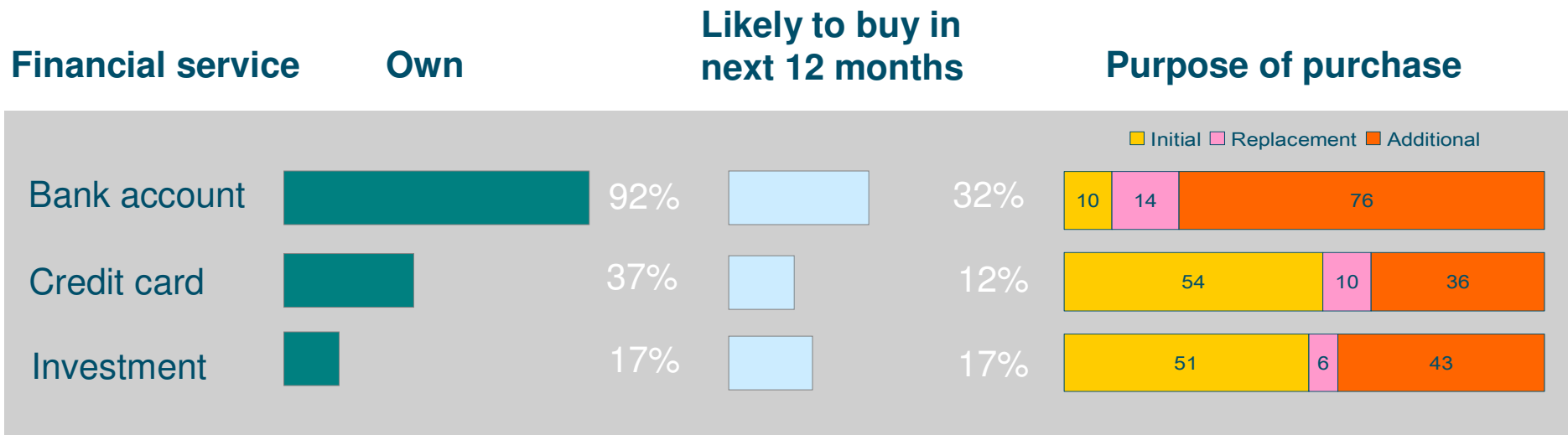
Product ownership



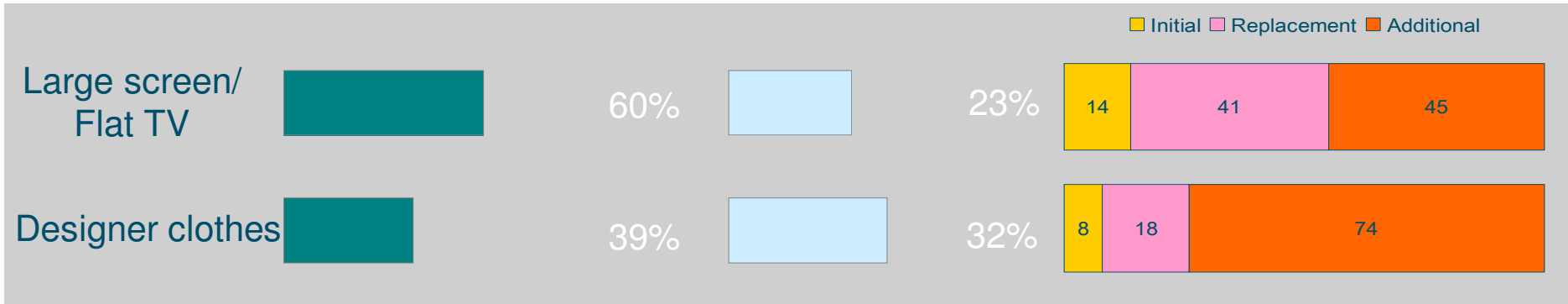
Vehicle



Product ownership



Luxury goods



Global retailers' image

	Awareness	Very Positive	Positive	Neutral	Negative	Very Negative
Carrefour	99	12	41	43	3	1
Wal-Mart	34	7	25	61	1	-
Tesco	97	12	51	35	2	-

How do I spend my weekday/weekend (hours)

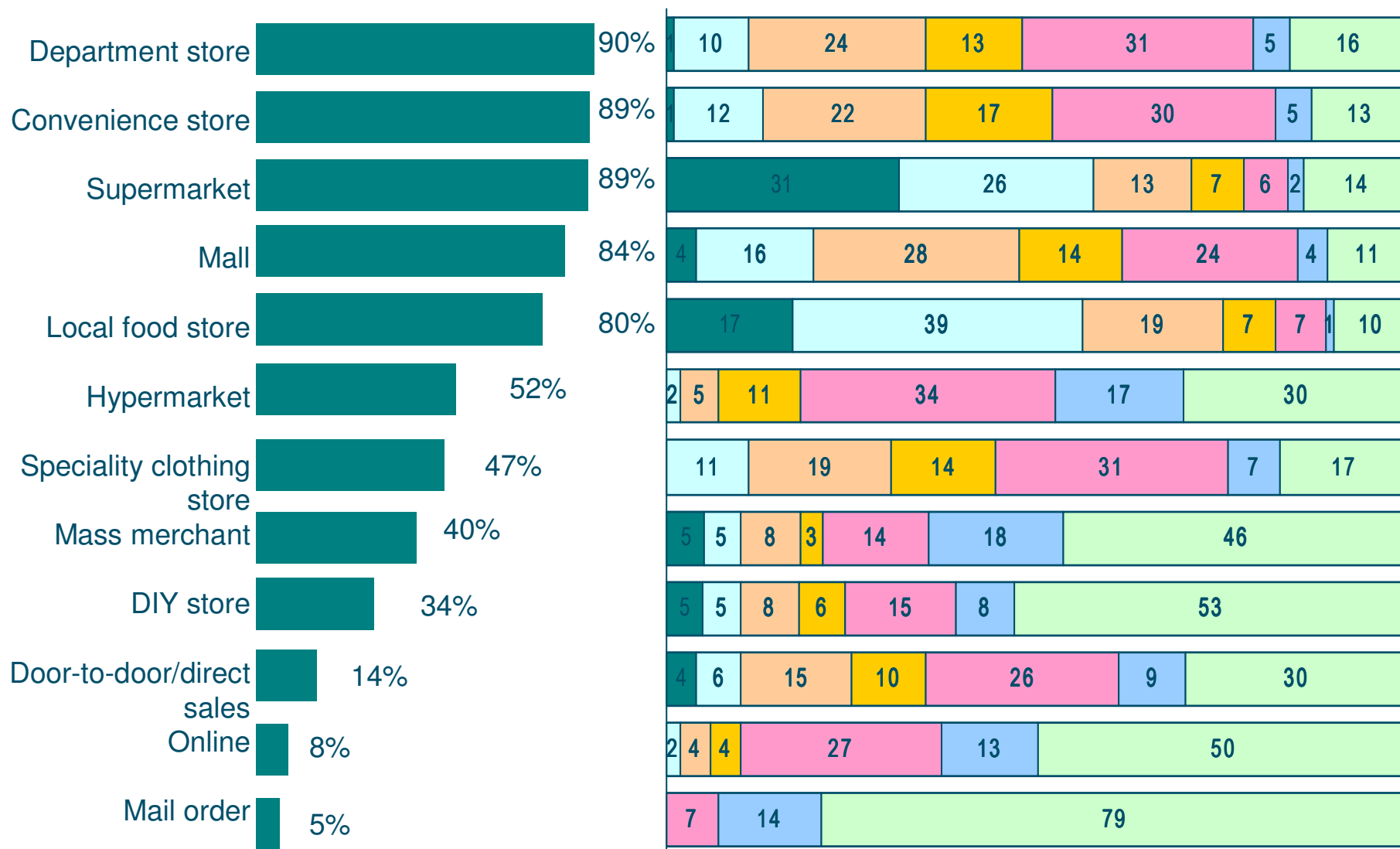
	Media/Information			Sleeping
	Reading newspapers/magazines	Surfing the Internet	Watching TV	
Weekday	0.78	1.09	2.34	6.61
Weekend	0.88	1.19	2.92	6.99

	Working/school			Exercising/ Playing sports	Staying at home
	Commuting	Housework	Work/school		
Weekday	0.81	1.36	5.7	0.74	2.89
Weekend	0.26	1.59	1.2	0.85	3.51

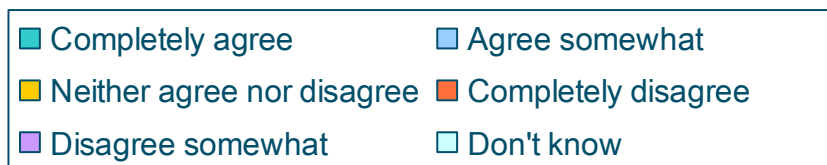


Retail penetration and frequency (past year)

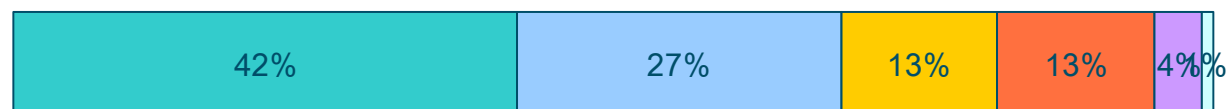
Every day Several times a week Once a week Once every 2 weeks Once a month Once every 3 months Less often



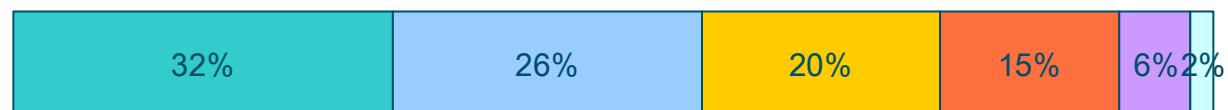
Local or international



Locally manufactured brands are just as good as international brands



Local retailers are just as good as international retailers



Most people don't know the difference



If a local and international brand are of equal quality and price, I would prefer the local brand



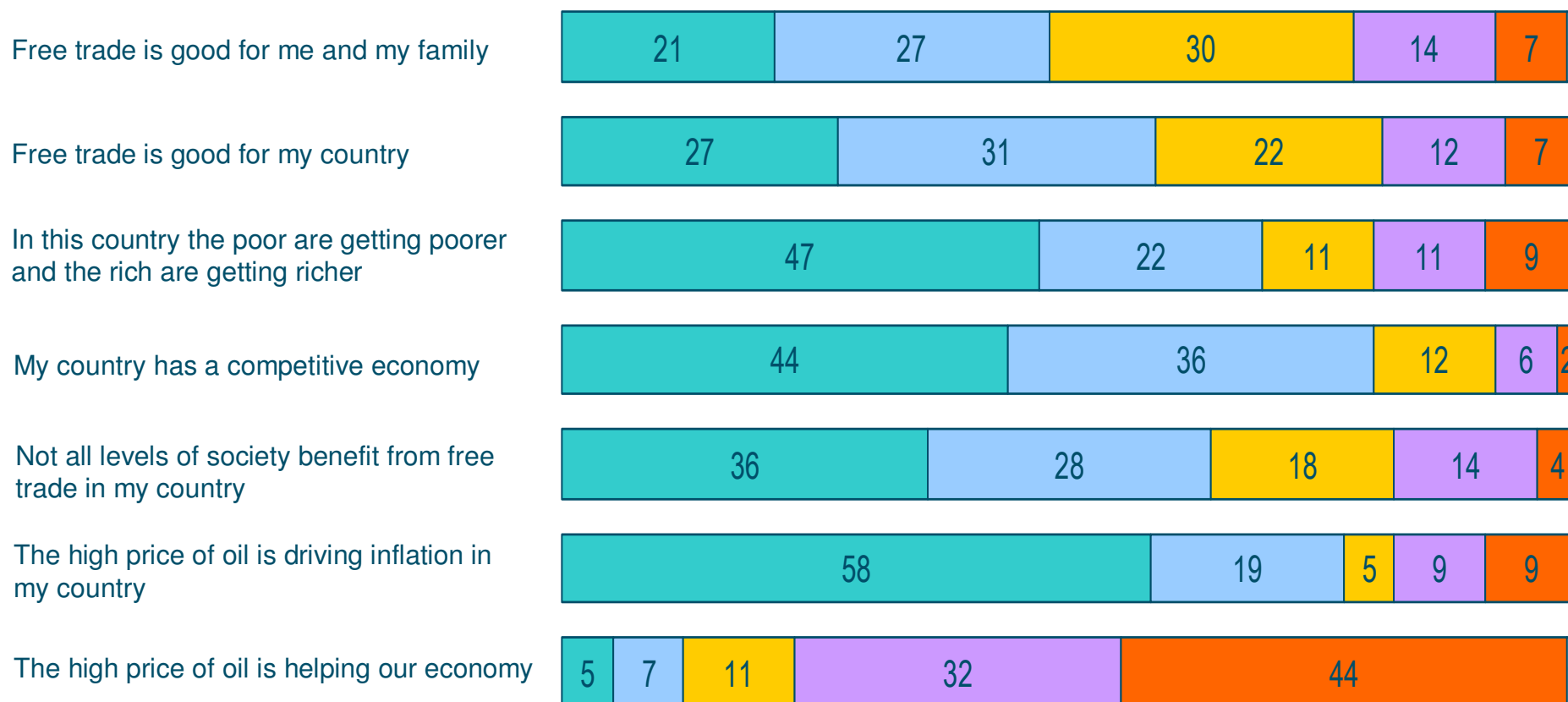
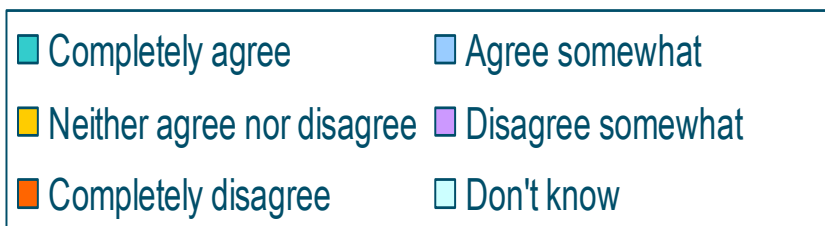
Have you experienced any of these distressing situations in the past year? (figures in per cent)

	Total
	80
Been asked for a bribe by a corrupt official	3
Been sick and could not afford medical attention	2
Been sick and could not get medical attention	4
Had to accept a pay cut	3
Had to skip a meal because you did not have money for food	2
Lost your primary job	9



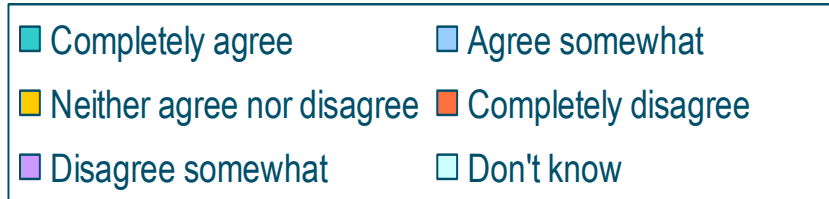
Attitudes (figures in percent)

Economy



Attitudes

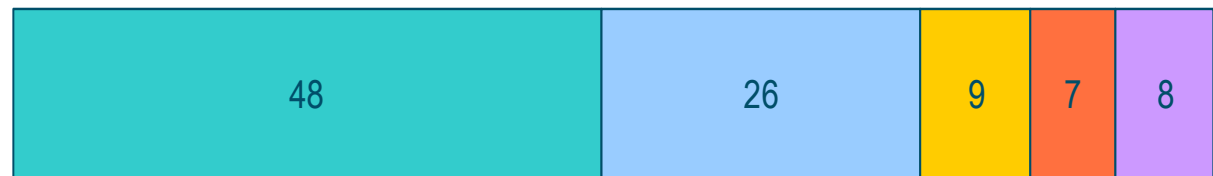
Environment



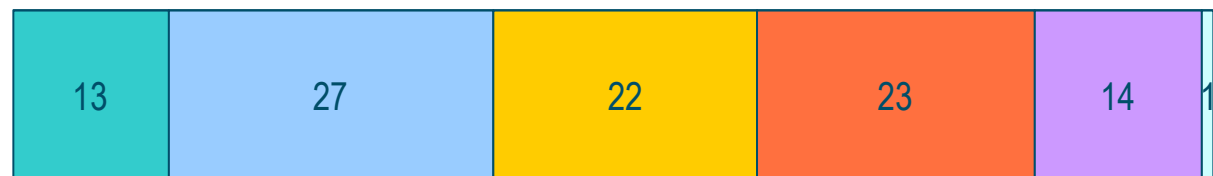
Environment degradation is a major issue in my country



The environment in my country is too polluted today

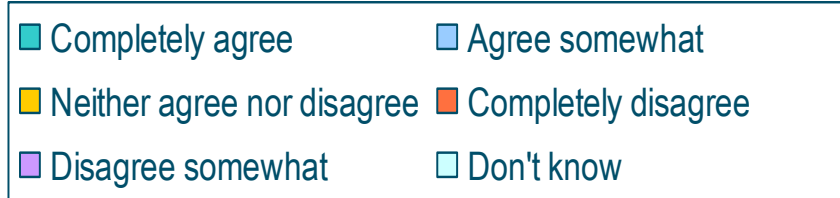


There is a good chance that my country will suffer a major natural disaster in the next 12 months



Attitudes

Personal



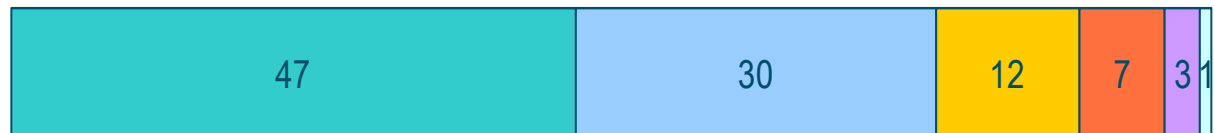
Five years ago things were better for me



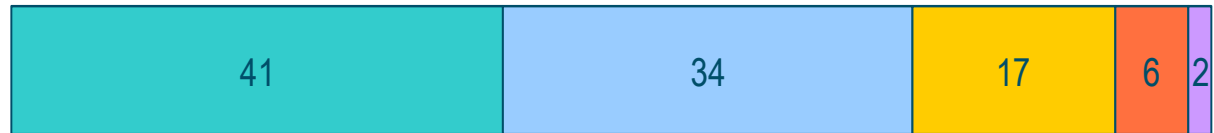
I would like to live and work in another country



In five years time things will have improved for me

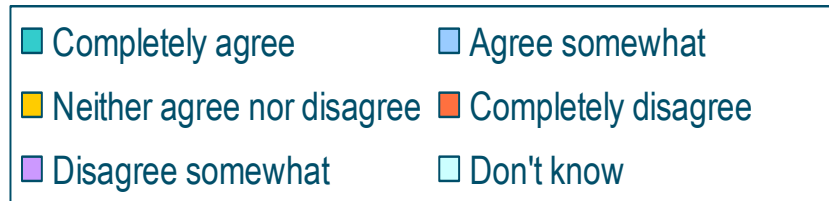


Today life is good to me and my family

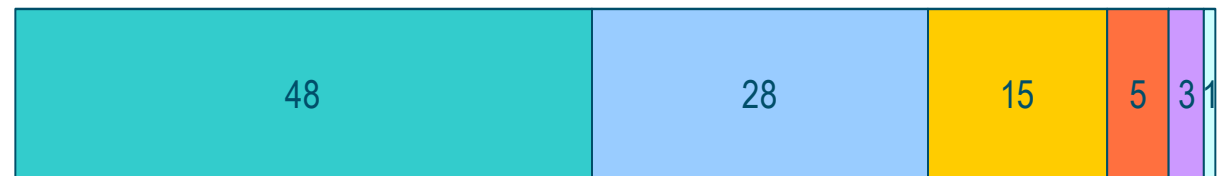


Attitudes

Social



I am proud of what my country has achieved



My country has a bright future



My country is innovative



Bringing lifetolife



Thank you