



Thailand 2017, Beyond the concerns.

GAME CHANGERS



Thailand 2017,
Beyond the concerns.

[Guide]

Ipsos Flair: Understand to anticipate

Jean-Marc Lech, Ipsos co-president from 1982 to 2014, launched Ipsos Flair in 2005 with three ambitions:

- *To consider survey results as sociological symptoms,*
- *To deliver a theory of the consumer,*
- *To provide our clients with effective tools to act and communicate.*

Essentially, “Flair” is designed to capture a distinct atmosphere – just as one may capture a perfume, feel the wind, or perceive the right direction.

It gives Ipsos the opportunity to:

- *Show that we collect, we compile, we comprehend and we create.*
- *Bring together our five complementary, major specialisations to better assess different facets of people: consumers, citizens, viewers, employees, millennials, seniors etc.*
- *Express original and sharp views on the countries in which Ipsos is present.*

“Flair” is also another way of looking at things, one that strives to understand the real relationship between people and everything around them: brands, ads, media...

Ipsos is an established player in the field of opinion, media, advertising and marketing polls.

Founded in France in 1975, Ipsos is an independent market research company controlled and managed by research professionals. It has grown into a worldwide research group with a strong presence in all key markets: offices in 87 countries, 16,450 employees. Ipsos ranks third in the global research industry and delivers insightful expertise. The company has been

listed on the Paris Stock Exchange since 1999, and worldwide revenues exceeded 1,785 billion euros (US\$ 1,982.6) in 2015.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their consumers. They test advertising and study audience responses to various media, and they measure public opinion around the globe.

Face-to-face or smartphone surveys, neuroscience, web listening - these can all be mobilised as tools for understanding and helping to make decisions.

In Thailand specifically, key questions arise such as how to control the development of the country and how to prolong it while reconciling economic turbulence with globalisation, and how to overcome the difficulties of the moment.

Ipsos Flair Thailand 2017 aims to go *“Beyond the concerns”*.

Henri Wallard
Deputy CEO

[Editorial]

The perils of perception

Launched in early 2014, the first Ipsos Flair in Thailand saw General Prayuth Chan-ocha come to power. The Ipsos Flair you are reading now was conceived in June 2016 and completed a few months after the sad passing of His Majesty King Rama IX in October 2016.

We are uniquely positioned to approach analysis of the trends and values that structure a society, its relationship with brands or advertising communications, and its expectations. In other words, understanding the state of mind of a country at any given moment.

For seventy years, the reign of HM Rama IX has indelibly marked the history of Thailand. One word springs to mind to characterise its major influence: development. A principle inherited from his father who had notably developed Siamese medicine, and his mother who did everything possible to alleviate the lives of the rural poor. The prosperity of Thailand compared with its neighbours is obvious.

The monarchical principle and dynastic succession guarantee the stability of a country: this was evident in Great Britain after Brexit, in Belgium at the moment when the country was divided, and in Spain when a military coup could have caused chaos. It is evident in Thailand with its mourning population and its collective hopes...

Stability is founded on the principles defined by His Majesty King Vajiravudh, and which determine the three pillars of the Thai identity:

- The nation (*chat thai*) and its language (*pasa thai*);
- Its religion (*satsana*);
- Loyalty to the Chakri monarchic dynasty and HM the King (*phra mahakrasat*).

This stability in Thailand is accompanied by a versatility, an exceptional ability to adapt, which our first title sought to explore: “Thailand 2015, preserving its unique versatility”.

Two years later, new questions arise challenging this versatility:

- *Questions of lifestyle - Thailand is still a fragmented society, given inequality and social disparity.*
- *Demographic questions reflecting Thailand’s ageing population, spanning numerous areas - health, pensions, retirement age, purchasing power etc.*
- *Economic questions concerning rising household debt, together with access to credit by the middle class.*
- *Questions of consumption, given increasingly narcissistic and demanding consumers who are more materialistic, in line with ego marketing.*
- *Social questions reflecting the growing empowerment of women and their expectations of recognition, status, success, independence and... self-indulgence.*
- *Questions regarding media - the addiction to technology, social networks and information, increasing consumer knowledgeability, comparison and criticism.*

Coming under strain

With the passing of HM King Rama IX, questions proliferate, shrouded in uncertainty. In its wake, investors are not the only ones who need reassurance about Thailand’s stability, management of transition, moralisation of public life and development projects. In other words, in three key spheres of politics, society, and the economy.

Many worrisome issues cloud the horizon, with growth prospects, the upcoming election, declining consumption and employment topping the list.

The future of “Thainess” is under threat, with various indicators giving cause for concern.

Concerns about the automobile industry - down 7.5% compared with the previous year, largely because of the increase in indirect taxes.

Concerns about exports, which declined by 1.9% to US\$ 87 billion over the first five months of 2016. Helping to counteract this trend, Thai rice exports to Africa rose by 60% after a few years of eclipse.

Concerns about the protectionist policies advocated by US President Donald Trump, citing China, Mexico, Colombia, Malaysia and Korea. Despite such restrictive policies, Thailand’s border trade is expected to increase by 3% in 2017, mainly due to the growth of the Cambodia, Laos, Myanmar and Vietnam (CLMV) economies.

Concerns are also growing about the ageing population, the small proportion of English speakers, and increased regional competition attracting investors and tourists.

Consequently, Thailand will have to manage tensions between its culture of versatility and a context of uncertainty and turbulence.

How can the country stay the course amidst such turbulence? Pedestrians with eyes glued to screens, jostling one another without glancing up, provide little encouragement. “Taking it easy” will no longer be as easy as it once was.

Hence our title for this year, “Beyond the concerns”, which does not deny reality, but still points to a new way.

Yves Bardon
Ipsos Flair Program Director

Pragmatism and flexibility, the Thai secret

The vision of Gordon Milne – Ipsos Thailand, Managing Director

Welcome to Ipsos Flair, Thailand. Our 2017 rendition, “*Beyond the concerns*”, offers a unique perspective on the mood of the country.

The prevailing sentiment has latterly been one of deep sorrow following the recent death of King Bhumibol and the seven decades of stability he reigned over.

The accession of His Majesty King Maha Vajiralongkorn Bodindradebayavarangkun signifies the prospect of genuine hope and renewal.

However, positive sentiment alone won't be enough to address recent political fragmentation and future prospects of reconciliation.

In addition, 2017 represents a crucial year for the Thai economy which has latterly suffered from weak growth.

The government looks to stimulate economic activity through state spending and incentives for private business investment. Recognising that old solutions aren't working and that new effort is required, the government has vowed to deliver Thailand 4.0, a value-based economy focused on innovation and sustainable technology, demonstrating a clear ambition to move the country ahead. However, without supporting details it remains unclear how this will be achieved.

“*Beyond the concerns*” highlights the continuing challenges and corresponding opportunities that present themselves in respect of changes in wider Thai society: demographics and a fast-ageing population, consumerism and the emergence of narcissism and the continuing quest for gender equality.

The navigation of change is an area in which Thais have historically proved to be adept.

The inherent resilience, pragmatism and flexibility of the Thai people has seen the easy blend of the traditional with the modern, the co-existence of local and foreign, the adoption and adaptation of technology, and the appropriate integration of new ways of thinking. This trait will be even more important as Thailand navigates an increasingly connected and globalised world.

However, with change comes tension and with tension comes opportunity.

This is the dynamic space where marketers and brands play an active and defining role, and one where timely and skilled consumer understanding and measurement is paramount for success. This is where Ipsos Thailand can demonstrate its 'Game Changers' ambition to both local and international clients.

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[Summaries]

*“You can never do anything extraordinary,
great or beautiful without thinking about it
more often and more thoroughly
than others.”*

Louis XIV, King of France
(1638 – 1715)

After King Bhumibol the Great

The view of Jérôme Hervio – Former Ipsos in Thailand Managing Director

Thailand has been grieving for its revered father since October 13th 2016, when King Bhumibol Adulyadej passed away in Siriraj hospital in Thonburi after 70 years as head of state.

The near-universal adoration that Thais of all origins feel for their late king has translated into a one-year mourning period, unique in the world. The phrase, *rao rak nai luang*, or we love the King, is one that most people proudly display on their cars, houses and even desks.

This is linked to the role of the king, to the length of his reign, to his extraordinary achievements and to his unique personality.

The idea of kingship in Siam and subsequently Thailand has been developed over centuries from the Buddhist concept of *dhammaraja*, a just king acting in accordance with the *dhamma* virtues of Buddhism.

King Bhumibol had very few legal powers; his influence was rooted in his personal and moral authority. He led the country as a gentle leader who used the powerful symbolism of the throne to unify and develop the nation.

The stability he brought to the country has enabled a long period of economic growth and the rise of the middle class. As the World Bank noted, *“Thailand’s economy grew at an average annual rate of 7.5% in the late 1980s and early 1990s, creating millions of jobs that helped pull millions of people out of poverty”*.

More importantly, some aspects of his teachings are still crucial when considering the challenges that Thailand is facing nowadays.

Two of those challenges are growing inequality and multiple environmental problems.

- The biggest risk for Thailand is division: political division, inequality between Bangkok and upcountry regions, the rich and the poor. The King’s most important and relevant advice touched on the need for unity, consensus and cooperation within society. King Bhumibol cared for all Thais, rich and poor, young and old, rural farmers and urban residents alike. He visited almost every town and village in Thailand. Unity of the country was his passion.
- His self-sufficiency economy has also emerged as a contemporary concept in a time of global warming. The Western world too often sees growth and development as an objective in itself. The King reminds us that sustainability, people’s quality of life and moral principles (honesty, hard work, sharing, tolerance) are equally important.

Following this guidance has enabled a successful development story. It will continue to help in the future to support resumption of a higher, more balanced, growth path that eliminates extreme poverty and boosts shared prosperity for all citizens.

As the pendulum swings

The constant quest for balance is a key element in understanding the expectations and values of Thai society:

- Balance between personal success, which can only be found in a big city (in particular Bangkok), and closeness with family members who have remained in the countryside:
 - Never break the bond.
- Balance between everyday life which can be stressful (traffic jams, pressure of work, the hustle and bustle of the megalopolis, bad weather), and the need for a break to recharge one’s batteries and take one’s time.
 - There is a yearning for the “slow life,” or sometimes just to get back in touch with nature.

- Balance between the cost of living, which leaves little budget for future planning or indulgence, and the desire to be a homeowner and raise a family:
 - Knowing how to ride the waves through proper debt management.
- Balance between traditional lifestyles and values (both cultural and spiritual) and the most materialistic aspects of modern life:
 - Displaying one's purchasing power without showing contempt for others.
- Balance between the rich complexity of direct exchanges and the tendency to simplification in the digital world, which is often reduced to "Like" and "Dislike":
 - Refining the spectrum of emotions.
- Balance between the accelerating pace of professional life and social networking, where people no longer accept a delay between question and response, and the need to take time out for one's private life:
 - Protecting one's personal time.
- Balance between appearances, often deceptive, and the culture of faces always having to be at their most beautiful:
 - Appearances and reality.
- Balance between personal convictions and a longing for civil harmony and peace:
 - Stability.

Most people are aware of the risk of slipping into a lifestyle fraught with competition, egotism, indifference, insularity, difficulties in relating to others, pretentiousness and conflict.

Such a lifestyle is tempting because it flatters people's baser instincts. Yet it conflicts with the values, especially those of Buddhism, which influence choices in everyday life.

Finding a balance between the benefits of material progress and technological transformation, and the benefits of staying the course along a spiritual path, is a constant challenge for the largest section of Thai society, millennials included.

[The flavour of money]

Even so, the role of money and exterior signs of wealth appear to be gaining importance in social relationships and exchanges, creating new and disturbing power dynamics. Whoever displays the most signs of success and purchasing power turns heads, earns respect or even the subservience of others, while those who do not garner disdain.

For traditional cultures characterised by giving and bartering, sometimes with a certain vagueness regarding the true value of products, placing money at the centre of all relationships is a relatively new development.

In a monetised world in which everything has a price, money transforms the ecosystem, creating distinct camps of haves and have nots.

Consumer credit has thus developed very quickly as an adjustment variable which allows one to carry on, creating a safety valve for enjoying life in the here and now.

Four trends are converging: the increasing popularity of credit cards, deferred debt, discounts given for paying by card instead of cash, and loyalty cards with their various offers. Credit gives the middle classes the pleasure of feeling rich, increases their social self-esteem, and allows them access to those 'must haves' without worrying too much about interest rates. Debt no longer scares anyone in this stratum.

This general trend towards monetisation is bringing Thailand closer to modernity, as it characterises the exclusively materialist consumer society of developed countries. To such a point, as Oscar Wilde¹ said, that people now "know the price of everything and the value of nothing."

The ubiquity of money brings the question of exemplarity into focus. Many scandals linked to the fortune of temples and ostentatious displays of wealth by certain monks have caused consternation, particularly among the younger generation. They are not the first to be perturbed by the discrepancy between Buddhist teachings and certain forms of behaviour, and this disquiet fuels a scepticism regarding the materialistic nature of global consumer society.

¹ Oscar Wilde (born Oct. 16, 1854, Dublin, Ireland – died Nov. 30, 1900, Paris, France) Irish wit, maverick, dandy, poet, and dramatist.

² Abraham Harold Maslow (1908 – 1970) was an American psychologist who was best known for creating Maslow's hierarchy of needs, a theory of psychological health predicated on fulfilling innate human needs in priority, culminating in self-actualisation. (Wikipedia)

In the 1950s, the psychologist Maslow² ranked various needs from the purely physiological through to self-actualisation, depicting them in the form of a pyramid. At its base, hunger, thirst, safety, hygiene – basic instinctive urges.

In concrete terms, these basic urges translate into the need for a roof, the need for food, to be able to move freely, and the need to preserve one's life.

There was no particular anxiety in this regard in traditional Thailand because, as the saying goes, *“as long as there is water, there will be rice in the paddies and fish in the rivers.”*

In modern terms, it is more a question of being a homeowner, having access to healthy food, having a car and access to healthcare, with all the accompanying financial implications.

The higher we climb up the pyramid, the more sophisticated the needs become. Enter social recognition, self-esteem, cultural property and luxury. The objects most aspired to are a curved 4K television screen, the newest generation smartphone, the latest creation of a luxury ice cream parlour or a handbag from a major Italian, American or French brand. This is what arouses desire now.

In many countries, the first category of needs has become the most expensive. Primary causes are a shortage of land, restrictive policies on land use, upscaling of housing stock and a low turnover in homeowners. Ever-diminishing supply has sent prices soaring while pushing the middle classes further and further away from the city centre or the business districts where they work.

Thailand is not an exception to this rule, especially Bangkok. Despite there being no shortage of land (the city still has room to grow, with accommodating infrastructures), prices have skyrocketed and the middle class has been pushed into outlying areas. House prices are still accessible in these outlying areas, but it is almost impossible to get a single detached house in central Bangkok, which is now cluttered with condominiums rather like Hong Kong and Singapore. Becoming a homeowner in the capital is turning into an impossible dream, as in many European countries.

Paradoxically, the most sophisticated needs tend to become more accessible. A little over a decade ago, a flat screen cost the equivalent of 700,000 Thai baht, whereas today one of the most expensive costs 90,000 baht. Fierce competition between brands has led to this evolution, and the consumer is the winner. Of course, the lower price is still expensive in absolute terms.

「To be single, to be happy?」

In Italy or Japan there are more and more thirty-year-olds living at home with their parents because of the financial crisis and the cost of living in big cities. In Greece, the impact of unemployment and the drop in salaries is such that many people in their thirties have returned home to parents who have greater financial resources and are able to help.

On the one hand, they remain single for much longer, the birth rate drops and the population ages. On the other hand, those who stay with family but also work have much greater purchasing power than those who have to pay all the expenses of housing and everyday living on their own.

Cynical minds might say that some pay while others take advantage, or that some live hand-to-mouth while others spend just for fun.

Yet such a claim makes a mockery of the true situation because the overall standard of living is improving. Not to mention that selling one's house to a developer provides the means to move into a condominium in Bangkok or another big city and radically transform one's life.

This trend underscores the changes in terms of products, packaging and communication. Which is most pertinent – showing a group of young people having fun in the street or showing young adults at home with their retired parents?

Materialism and happiness

Young adults are changing and adopting materialism without guilt, and placing a higher value on money than their elders did. They want to create their own businesses and find success as quickly as possible. The time for satisfying their desires is now.

Young adults are also more demanding, with brands diversifying, developing their ranges and introducing innovations that leave a model outdated just a few months after its launch. Even if the price tag is smaller due to sales, promotions and online selling, they still need more money.

Meanwhile, they can enjoy the comforts of home and their parents do not feel so alone or so far away.

The internet provides a tremendous boost in this context, through the sharing of different case studies, information, gossip and tips, from Pantip to Facebook. All channels are useful for capitalising on experiences that everyone can relate to and that can accelerate the creation of a shop, restaurant or other business start-up.

Just as YouTube starlets are followed by tens of thousands of fans, those who give the best advice also have a right to their “fifteen minutes of fame” as Andy Warhol said!

Planet Internet, where the virtual replaces the real world

Thailand is one of SouthEast Asia’s leading countries in terms of internet use, ahead of Singapore. E-commerce is quickly developing, both because of promotions offered by online merchants providing access to international brands via secure transactions... and because of the traffic jams that turn travelling to shopping malls into an interminable odyssey.

Just as with any monopoly under threat, traditional distribution must adapt and respond with increasingly attractive offers, carrying discounts of up to 70% or even 80%. The ultimate pitch is allowing the customer to get a tangible idea of the product by seeing it, handling it and trying it.

E-commerce has had such an impact that offline commerce has made room for broader, more varied offerings. Gone are the days of standardised shopping malls comprising shops with interchangeable brands. The trend is now toward spaces which offer the maximum number of experiences, uses and services possible. In addition to the usual brands, there are banks, cinemas, restaurants, bookshops, play areas and other attractions which have transformed the original concept into the equivalent of a small town - entertaining, fun and... air-conditioned.

It’s easy to imagine that exclusive Thai or international brands distributed on the basis of marketing their scarcity (as opposed to having one or two points of sale on each floor throughout a maximum number of stores) would be successful, and would increase the general footfall in upmarket shopping malls.

Thai brands – seductive competitors

The perception of Thai brands has evolved significantly in this regard. Consumer appetites have long been whetted by products “made in Japan” or “made in USA”.

Now however, with the OTOP³ programme and targeted policies, local products inspire greater trust and enthusiasm, especially when it comes to tailoring, health and beauty.

In addition, there is the matter of attachment to one’s country, saving money⁴, and the almost magical balance between a Thai product, Thai communication and the Thai people. There is also the link with everything to which the internet provides access, i.e. the brand’s history, its origin, ingredients and benefits, with reviews and stories from satisfied Thai customers (though these

³ One Tambon One Product is a local entrepreneurship stimulus program, drawing its inspiration from Japan’s successful One Village One Product (OVOP) program. (Wikipedia)

⁴ Taxes are lower than those for imported products.

should be taken with a pinch of salt, since they sometimes originate from marketing services, as they do everywhere else in the world).

It must be said that most Thai people still do not speak fluent English, but everything expressed in Thai is immediately understood, decoded and credible (or incredible).

This adds up to so much developing competition for international brands, especially in the field of beauty products, where the benefits, the origin and the composition are the most important aspects for conviction, reassurance and even seduction.

In the cosmetics sector, effectiveness is the most sought-after quality in a world influenced by television programmes, beauty codes and advertising which intensify the culture of a face striving for perfection.

In ready-to-wear goods and accessories, the best brands have to be able to compete with other luxury makes, with price points either in line or even higher, giving a promise of even greater quality. Brands such as Jaspal, Asava and Disaya have been jockeying for position.

Thai companies have unabashedly waged war against the leaders. The Pizza Company has crowded out Pizza Hut, just as Est Cola and Chang have eliminated Pepsi Cola and Carlsberg.

「Tantalising trends」

What Maslow did not explicitly foresee is that individuals would be at the top of their own narcissistic pyramids. In other words, that all of their needs would be concentrated on an ideal embodiment of a man or woman.

This is clearly supported by the gyms, detox drinks, whitening creams, plastic surgery and everything else that helps people resemble Korean or Taiwanese stars popularised on television or in magazines.

It explains why young Thai people stay in step with trends, and also the rate of adoption of every trend that personifies an ideal with which people aspire to identify, either for their own enjoyment or to be part of the group.

Some are more serious than others. For example, this is reflected in degrees of concern about one's health, proper diet, protection from the effects of pollution, and generally taking care of oneself through a healthy lifestyle. This internal care is reflected in one's external appearance. Behaviour has been fuelled by several food scandals and by awareness of the risks associated with pesticides in agriculture, announced by official campaigns.

The elderly are generally less sensitive to trends, especially in the provinces and traditional circles, but a new generation of seniors has begun to adopt – and will continue increasingly to adopt – this taste for new trends and associated values (beauty, form, seduction) as they enter this new stage of life, regardless of gender.

We see this in the growth of metrosexual habits or in the affirmation of a “real man,” using well-dressed stars or football players who praise treatments and dietary supplements, inviting men to visit beauty or hair salons more often.

「Happiness is a show」

Just feeling happy is not the most important thing.

You have to show it and share it as much as possible. It's almost a spontaneous competition between people; they put on performances of happiness in hotels, restaurants or expensive cafes with luxury brands or accessories, so they can get a maximum number of “likes” and flattering comments on social networks. That is what constitutes happiness.

Carefree joy of living and spontaneity are essential values to communicate. They exemplify the pleasure of getting the most from the present and having the financial resources to enhance and embellish it, as though a laid-back and cool attitude were the indicator of purchasing power.

The body and its seductive ability are key elements in the Happiness Show.

For men, it's about good skin with muscles evident under a well-fitting suit, and a nice haircut. For women, an elegant figure and makeup that is at once both natural and sophisticated. For both, a healthy and balanced diet, and all the dietary supplements for boosting the body's resources.

The perception of others is the mirror in which we find our own happiness. That is one of the reasons why social networks are so successful. There are 37 million daily users of Facebook or Line in Thailand – well over half the population of 67 million – with 90% accessing them from a mobile phone. Instagram is the overall champion, making the Siam Paragon shopping mall one of the most “Instagrammed” places in the world, even ahead of New York's Times Square and the Eiffel Tower in Paris.

[Acceleration]

Differences between the capital and the rest of the country will increasingly become blurred with the development of the internet and the circulation of people facilitated by low-cost air travel and improved infrastructure.

The central government is encouraging the provinces to develop specific policies adapted to their needs in order to boost their growth.

Meanwhile, the digital world is offering services that the offline world cannot provide everywhere, whether it be access to education, knowledge, consumer goods or simply communication with others.

A lot of fun results. Bangkokians will mimic various Korean pop stars, and their provincial Facebook friends will copy them in turn. Likewise, selfies can popularise dress codes from which everyone can draw inspiration.

There are also more serious issues with new perspectives that change daily life, referents and ideas that act as springboards for discussion and interaction of viewpoints and opinions.

There are constant invitations to compare and question. Quite a change for Thailand, where asking questions about ongoing situations has moved to the top of the agenda.

[Millennials & 'Thainess']

Will millennials move away from Thai values?

There are different ways of identifying the next generation: Gen Y, 15-35 or 18-29 year-olds but, whichever way it's defined, this next generation will be soon the largest component of the workforce and will define the future of Thailand.

It is therefore critical to listen to them, to identify their attitudes and values.

It is also important to try to unpick the period effect (notably those aspects linked to limited economic growth and the military regime), the lifecycle effect (younger generations tend to think differently in any country and culture) and the cohort effect (each cohort has different views and these stay different over time).

A recent article in the Bangkok Post dedicated to millennials concluded that driven by usage of social networks, Thai millennials have become increasingly similar to their counterparts in the West and are becoming disconnected from Thailand and its centuries of tradition and culture.

The article also points to a few typical characteristics of Thai millennials:

- Freedom of self-expression and the ability to decide the direction of their own lives
- Growing individualism

- Willingness to challenge the education system
- Desire to succeed and become famous through reality television (The Voice Thailand, Thailand's Got Talent etc.), or by sharing their lives and hobbies on social media.
- Greater interest in environmental issues
- An urge to travel and visit exotic destinations.

The Thai Market Research Society (TMRS) recently decided to focus on the 18-29 year-old age group. A slightly narrower, but also more homogeneous target group than millennials as a whole. This group represents 21% of the total population.

Some of the key findings point to a more balanced conclusion. Let's compare the views of this next generation with feedback from the older generation.

The next generation is certainly ambitious and ready to take risks, change jobs, learn and work hard to succeed. They would prefer to start their own companies to control their own destiny and objectives, and to get full reward for their efforts.

They see themselves as 'more confident, more creative and more modern' They also believe they have 'the courage to think and express themselves and take action'.

When it comes to values they are not that different from the older generation.

'Accountability', 'integrity', and 'valuing the nation, monarch, and religion' are the most important values for both groups. 'Family' is also described as the most influential factor in life for both generations.

Interestingly, 'giving & caring for others' is found to be more important among the younger generation.

The next generation is connected, individual, open, and also responsible and compassionate.

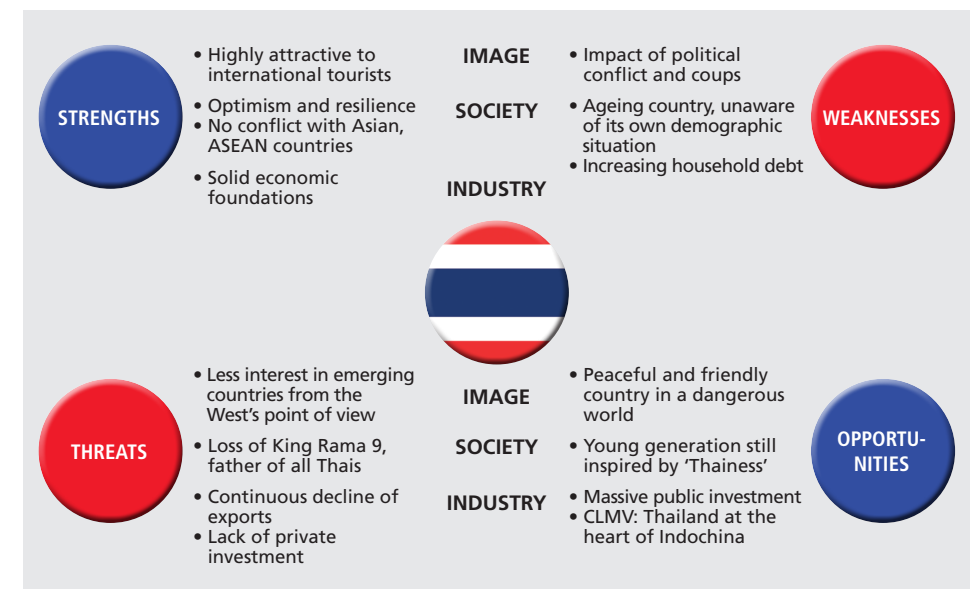
Just as in other countries in the world, a better future no longer seems so certain for the next generation. They retain some of the typical Thai sense of optimism, but there is a clear shortfall compared with the older generation: 58% are optimistic about the future compared with 67% of older people.

Overall it seems that the next generation retains the Thai DNA, but needs to adapt to a tougher world. This means having personal goals, a good level of education and staying informed about news, events and current affairs.

There are some essential learnings for brands and communications:

- The next generation is probably ready to accept a more direct language.
- They will prefer brands that share the same values as themselves: respect for the environment, caring for others, giving back to society. CSR may play a larger role.
- In some ways the next generation is less healthy than earlier generations. The obesity rate has increased in schools. Whilst they love organised running events, they exercise less than their parents. Food and beverage companies need to help them adopt a healthier diet and lifestyle.

[S.W.O.T.]



[Focuses]

Thailand – the old man of ASEAN

According to the UN, by 2050 one-third of the Thai population will comprise older people aged 60+. Partially as a result of successful contraception programmes introduced into Thailand in the 1970s, the birth rate has fallen.

A downside to this is that there will be a smaller working population in the future. This demographic shift is likely to have an important long-term impact on the economy. Increased dependence on pensions, healthcare, and more specifically a long-term care system for elderly people, will impose a large financial burden on the country.

It may also cause lower levels of economic growth (as occurred in Japan with the increase in the country's ageing population).

A key challenge for Thailand is how to shape the future and drive the economy within this changing demographic structure. It poses new challenges, but also raises new opportunities.

By Rattaya Kulpradith,
Ipsos Marketing

A sizeable demographic shift

While most of Southeast Asia is expected to comprise relatively young populations in the decades ahead, one country is bucking the trend in a big way. Thailand is ageing rapidly and not enough is being done to prepare the country for this sizeable demographic shift.

Traditionally, living with one or more grown-up children has been a longstanding practice among older parents in Thailand. Children have always been expected to take care of their parents once they become older to show their gratefulness (*gatunyoo rookhun* = กตัญญูรู้คุณ).

In turn, grandparents will take care of grandchildren while the main breadwinners are out working. These values have been passed on through the generations. How long this can be maintained remains an unanswered question, given the challenges posed by people getting married later in life, lower birth rates, increasing urbanisation and longer life expectancy.

At the moment the majority of Thais continue to work well beyond their official retirement age and this is for a variety of reasons.

Today's older generation is much healthier than its counterparts were a few decades ago. As the cost of living rises, many feel a need to supplement their income due to very limited savings.

A high proportion of the population has traditionally been self-employed and has therefore tended to live day-to-day. Members of this generation, in the main, will not have been contributing to pension funds, and as such become dependent on their offspring as they get older.

To facilitate and manage the changes in demographic structure effectively, it will require changes in policy and attitudes to allow older people to play a greater role in driving the country forward and become less of a financial burden:

- Thailand should invest in less heavy labour-intensive industries (e.g. arts & crafts, service & hospitality, cultivating organic produce). The elderly should be given an opportunity to be re-trained so they can find work in these less labour-intensive industries.
- A later retirement age can also help. In many sectors and positions, job experience is crucial. Companies can unlock valuable human resource by allowing older employees to work either from home or on a part-time basis. Older employees, in turn, can help make these conditions viable for companies by accepting reduced benefits and wages.

With a continued income, albeit perhaps at a reduced level, the elderly can take care of their own health and wellbeing. They will have higher purchasing power and can help contribute to economic growth in the future.

Currently, not many brands are targeting the senior segment, with possible exceptions being insurance and health supplements.

With the rapid shift in the ageing population, tailoring products and services to the needs of this generation will have obvious benefits for marketers.

Success will however depend on a clear understanding of the needs and wants of this group.

Hence, it is critically important to understand the differences between the ageing people of today and those of tomorrow, so brands can prepare themselves to communicate their benefits in a meaningful and relevant way.

Today's older generation:

- They have all worked hard to send their children to school and want them to have a good stable job in a company. Essentially they want more financial security for their children than they currently experience themselves.
- Despite having worked very hard all their lives, few can be regarded as wealthy. Everything they have done (or earned over the years) has been for the betterment of their offspring.
- The majority are still working, particularly in upcountry areas, due to low levels of saving and a very limited income (most work in agriculture or related roles).
- They have strong family values and live with one of their children. The expectation is that their children will provide them with an income and in turn, they will help take care of the grandchildren. In upcountry areas, it is common to have adult children working in the city and sending money home to their ageing parents so they can take care of the family.
- They have a strong sense of community and dedicate their time to assist and become involved in community activities. The temple and religion play an important role in the daily lives of most.
- They feel undervalued and are concerned about being seen as a burden on society.
- They have limited access to healthcare and any welfare system.

Tomorrow's older generation:

- They place importance on building a career and becoming successful. As such, they tend to get married later and many do not have (as many) children. Those with a family, unlike their parents, will not rely on their children to take care of them in their old age.
- They are better educated and are more connected online. The internet can provide them with endless possibilities, even in their old age.
- They retain strong family values, but at the same time have a strong sense of self-worth.
- They are healthy and have a longer life expectancy, so they can work longer to earn a living. Some may continue to work in a company while others will consider setting up online businesses to give themselves multiple sources of income. They are very entrepreneurial in this regard and like their independence.
- They are more health-conscious than their parents and a good work-life balance is important to them.
- They like to travel and experience the world. They like to be entertained.
- They will participate in causes in which they are interested via both online and offline communities.
- They will need greater access to healthcare facilities and possibly even retirement homes. They will plan for their retirement and save for it as they are less likely to be dependent on their children.
- They will take part in driving the Thai economy forward, and try not to be a burden on society.

Given their age and experience, the older segment of the population is a savvy group of people. They will not be taken in by claims that are unsubstantiated.

Currently, they have limited spending power, so will consider choices carefully. Brands need to offer products or services of value that meet an unmet need.

Aspects such as functionality and safety of products and how well they match up with older consumers' needs should be taken into account, perhaps to a greater degree than with younger audiences.

This is a large segment of the population now and, if understood and marketed to correctly, one which businesses can reap benefits from in the future. Traditionally, market research studies have tended to lump older people together into an age bracket of 55+ in their analyses.

Clients, particularly those in the fast growing ASEAN markets have tended to focus their efforts on the most lucrative groups with the highest levels of disposable income. And probably rightly so.

It may now be time to consider looking at this larger and growing demographic in a lot more detail than has been done in the past.

「Womanhood」

The stereotypical view of Thai women is that they are elegant but somewhat delicate creatures.

They are polite, shy and well-mannered. Their priority is to take care of their husbands and family. Thai women follow the expectations of their husbands. Their smile is an enduring factor.

Is this still true – or was it ever really true at such a simplistic level?

Perhaps it was true in the 18th and 19th centuries, but 200 years on this viewpoint is outdated, particularly in the more urban areas of Thailand.

《 **By Rattaya Kulpradith,**
Ipsos Marketing 》

Back in history

To understand a little more, we need to look back in history.

Back to the time of HM King Rama VI, the first Thai monarch to study abroad. He studied in England between 1893 and 1903.

During this time, he had the opportunity to observe the advancement of women's rights and changes in attitudes in the West. On return to his homeland, he launched a campaign to promote Thai women's rights, though this was mainly focused on women from more affluent families and those holding positions in high society.

The 1932 revolution resulted in a change of political system – a move away from an absolute towards a constitutional monarchy. This event had a significant impact on the social norms regarding a Thai woman's place in society. The new constitution enabled women to enjoy a far more equal standing.

So does the stereotypical view of Thai women still apply in the modern era?

At face value, it would seem so. But it is a lot more complex than that simple perception. What you see is not necessarily what you get. Much happens 'behind the curtains' as the saying goes.

In modern society there remain radical differences in both behaviour and attitudes among Thai women.

Does the average woman in a small rural provincial town, who depends on the funds she generates from selling food from a street stall, think in the same way as a woman from a middle class Bangkok family?

Absolutely not. Urban centres have developed faster than those in rural centres but let's remember that about 70% of Thailand's population still live outside the main urban centres.

In general Thai women are becoming better educated, with many now capable of going onto tertiary education. Obviously, as in any developing country, there are many who are capable of this but simply cannot afford the associated fees. Those from more affluent families often take up studies abroad and as such, become influenced by Western values.

It is now not uncommon for Thai women to work outside the home. Many hold senior positions in companies. In fact, Thailand is in the top tier of countries with high percentages of women holding senior management or boardroom positions.

Womanhood and principles

Another factor that needs to be considered is the strong influence of Buddhist principles.

It is very difficult for a Thai woman to go against her culture and key principles that have been ingrained from an early age. As such, Thai wives still play (or at least outside the home are seen to play) very much a supporting role to their husbands.

This is best exemplified by the old Thai phrase "The husband is the front legs of the elephant while the wife is the hind legs" (ผู้ชายเป็นข้างเท้าหน้า ผู้หญิงเป็นข้างเท้าหลัง).

Thai women, in many instances, can be seen to be subservient and hold the values we initially outlined, but in current times one has to look 'behind the curtain'. Walk down any street in any

town in Thailand and you will see women at work - selling food from street stalls, working in shops, buying groceries etc. In fact, you will probably see more women working than men.

Many women are also involved in heavy manual labour, such as construction. It is common for women to perform jobs which in the West are traditionally the domain of men.

In many instances, women are the main breadwinners for the family. Without their efforts the family may not survive. Within a marriage, again 'behind the curtain', women are the source of power but externally are almost always seen as the supporting party.

Thailand remains a patriarchal society and while this is changing over time, it is nevertheless changing slowly. And will continue to do so.

Thai women accept that they are expected to be the nurturers of their household. This will always be their main priority. Household duties frequently override those of the workplace.

Behind the mask

So to answer the original question, the perception that Thai women are elegant but somewhat delicate creatures is incorrect – there is far more substance behind the mask.

But they remain polite, shy and well-mannered. Their priority is always to take care of their husbands and family.

Thai women continue to follow the expectations of their husbands. Their smile is an enduring factor (but if one looks behind the smile, one is likely to find a much stronger person than perhaps might have been expected).

Having said this, it is almost an impossible task to generalise and describe the characteristics of a Thai woman in a few paragraphs. Many have tried to summarise this in tomes of words and have still failed.

[New families]

Consistent with many Asian countries, a Thai family has a natural hierarchy with the parents at the top.

Parents do whatever they can to educate their children to the best of their abilities, and in return the children are expected to honour their parents and show appreciation for the time and money spent on their education.

Children are expected to demonstrate their gratitude towards their parents. One of the worst insults for a Thai person is to be deemed ungrateful.

Historically, Thai children have tended to live fairly close to the family home. The expectation, as the children start to generate their own income, is that a (reasonably substantial) part of their wages is given to their parents.

In modern day society, things are changing but for many families the traditional values still apply.

⟨ **By Rattaya Kulpradith,**
Ipsos Marketing ⟩

Changes & continuity

With the industrialisation of Thailand, many young Thai people from upcountry areas try to move to 'the big city' (most frequently Bangkok) to maximise their chances of success and hope for a better life ahead. In most instances they continue to send money to support their parents.

But parents, often living far away, have less influence on them. In previous decades parents chose the mate or life partner. Nowadays many young Thai people choose their own. However, dowry is still the expected norm for many Thai families.

It is commonplace for children to continue to live in their parents' house even if they are old enough to live their own lives. This

particularly applies to daughters, who are not expected to leave the family home if they are not married.

In Thailand there is no pension system for workers when they retire. The government provides a nominal sum but this is nowhere near sufficient to live on. For many, the only support for older parents is the income provided by their children.

Thai people, in the main, would not entertain the commonplace western principle of placing elderly parents in nursing homes designed to cater for the needs of the ageing population.

Such a move would be deemed ungrateful and disrespectful to the family. Expectations are that all the family should continue to live together. Children provide assurance for ageing parents to continue to live as comfortably as they have done, whilst not earning an income. A very different scenario from most Western countries.

In 1970, the average Thai household size was 5.7 people. By the time of the 2010 census, this figure was down to 3.2 per household. Rapid socioeconomic growth, marked fertility declines, and a changing age demographic have transformed the family structure and the role of women.

Nevertheless, traditional family values continue to remain in place.

Extended families are no longer the norm

Thai families have become more nuclear, and a growing divorce rate has resulted in three million broken homes.

Currently, about 55% of families, some 16 million, are categorised as nuclear, while 32% are extended families. The marriage registration rate has also declined with people getting married later in life. The number of unmarried cohabiting couples has also increased. Also current estimates are that more than 1.3 million households comprise single-parent families.

A new type of family - same-sex couples - has fairly recently emerged and is growing in size, as Thai society becomes more tolerant and provides more opportunity for LGBT people to live openly as couples. There are currently no accurate statistics on this new family type.

The most common problems encountered by Thai families include poverty-related issues such as increasing debt, domestic violence, lack of land ownership and drug abuse. Government assistance for Thai families in these areas is negligible – problems are regarded as a matter for the individuals and families involved to cope with.

Two types of family in contemporary Thai society

- **The first is the “modern” family**, in which parents are too busy working and thus have no time to raise their children, leaving them with substitute institutions such as nurseries. This leads to children growing up physically, but not so well in terms of emotional or psychological values.
- **The second type is the “post-modern” family**. Members are more individual but have a sense of loneliness and appear to aspire to fame, wealth and social status.

Although the family structure does not indicate how healthy the family is or how it functions, the traditional Thai family values need be preserved for the next generation as healthy, educated families are the essential foundation on which to build a stronger nation.

In common with Japan, Thailand has a rapidly ageing population, so as time goes by this will place even more pressure on families to support parents for perhaps a longer period of time than in the past.

「Social networking in Thailand」

Nowadays it's quick and easy for people to get information through the social network - either positive or negative news, real or fake stories.

So sharing carefully in a considered way is important to avoid casting aspersions on other people. There are many social media and network platforms, and users should learn how to use them appropriately before sharing and posting.

It's a matter of awareness of other people and social responsibility.

《 **By Nawajit Thanaboon,**
Ipsos Marketing & Communication 》

Learning together – sharing and concerns

When social networking first arrived in people's lives, it was a new toy. People learned how to use various applications such as Facebook, LINE and Instagram, and spent a huge amount of time on them.

They're so much fun to play with, they help people to meet friends, open up a new world, and gain new knowledge – it's really good being in the digital world. The social network is a channel that helps people to share and to be themselves. They can talk and share many things which they may not want to do face-to-face.

It's as though this is who they really are and this is what they really feel. It's their own area for release of emotions and stating their feelings. However, it's a two-sided coin - when people express more, they're also more exposed.

Today, we often hear about the downside of spontaneous sharing and the negative impact this can have on other people, given the tone and content of certain posts.

There is now increasing concern about getting your facts right and avoiding any distortion of information, because people are afraid of unintentionally maligning, offending or embarrassing others. They are more considerate when they use social media both when sharing and receiving information compared with the early days.

Here are some comments from Thai people about social network usage and their concerns:

“I used to post and share whatever came to mind, sometimes without being careful enough, particularly when it was about my job. Now I’m more careful since I’ve read in the news about companies imposing penalties in many cases which have impacted on people’s careers.”

“If I receive false information and comment on it because I mistakenly believe it, then that gets others into trouble.”

“I’m not concerned as I’m confident in my own judgement. But I do worry about kids who lack the experience to weigh up the information they’re exposed to. They may easily get deceived.”

From a business perspective, brand and marketing people should ensure information is true and trustworthy before launching any campaign, as social networking will impact their brands directly and rapidly.

As we all know, Thai people in general love simplicity and fun.

They love to share fun moments with their family and friends, but sometimes they fail to consider the impact. Quite often they will end up with “whatever makes me happy” – **เอาที่สบายใจ** (or conversely fail to share the moment if they think too much about it before doing so).

So, when a brand shares information, it needs to keep it simple and uncomplicated, but still interesting.

The social network - beyond entertainment!

Normally, the primary objectives of people who use the social network are to connect with family and friends, share or post their comments, and express their feelings.

But the smartphone has also become a constant companion used for entertainment in free time or when waiting.

While this new close friend can be used for all sorts of games or to follow favourite programmes, it is now even more than an entertainment platform.

People can now search for more information about subjects of interest, and adapt this knowledge to their lifestyle in areas such as health, cooking, travelling, gardening, education and so on.

“My friends who have the same interest in exercise and cooking healthy food will share related topics on YouTube via the social network, so I open whichever clips match my interests.”

“Apart from watching video clips and playing games, I use it for promoting and selling various goods and products.”

“Online shopping is another social network activity. I can chat with the seller to get more detail before buying.”

“I invite people to join me for merit-making. Fund raising to relieve poverty and other things.”

Social media helps people to connect easily throughout the world. Apart from connecting with their family and friends, it helps to create communities of people who have the same interests.

It’s interesting that Thais use social media to ‘make merit’ together - it gives people the ability to help others with fewer opportunities in society, as well as being a way to maintain Buddhism.

Why do people turn to online shopping via the social network?

Well, today, people are looking for hobbies that can generate additional income.

The social network is leveraged for online shopping as people can see each other’s posts in real time. Social networking brings seller

and buyer closer together than online shopping via a website does. Sellers and buyers can chat with one another; it's like an interactive conversation to ensure the products are what the buyer really wants before he or she agrees to buy them.

Having a conversation with the seller via the social network creates a sense of human connection rather like buying at a real store.

Even though nowadays we see many people glued to their smartphones, playing games and so on, it seems that in the end they still need that feeling of human interaction.

Reducing the gap between Bangkok and the provinces

Thai society still reflects differences between urban and rural lifestyles which are based on income.

But social networking helps to reduce gaps in access to information for people – at least those who can afford the various gadgets or devices that connect to the internet - wherever they are.

So you see people here in Bangkok spending time on their smartphones sharing moments, playing games, watching their favourite programmes and searching for information on whatever they are interested in – but this is no different in provincial towns.

Of course, the social network helps to bring people much closer together and connect them more often. You can connect with family and friends any time you want to share anything from exciting experiences to negative feelings.

So even distant family members and friends can open their worlds to what you see and share with them. This helps to reduce the gap in terms of receiving information, but it doesn't mean recipients will necessarily put the right interpretation on that information, because of differences of context, environment and culture.

Social networking can be used for the exchange of ideas. And not just city dwellers sharing ideas with those upcountry, but vice versa as well. City people will have more understanding about urban or rural lifestyles upcountry if friends (or friends of friends)

share interesting provincial culture with them. It all helps to reduce gaps in cultural understanding.

The social network is also a tool for building new businesses both in Bangkok and the provinces if people who receive the relevant information can spark new ideas in their area. Actually this has little to do with city or rural dwelling, but it's more to do with individual talents and skills. Social networking provides better opportunities for everyone compared to the past, but what they do with those opportunities depends on people's talent and how they think and leverage them.

In summary, we can't really say that the social network directly reduces the gap between Bangkok and upcountry provinces, but it is a tool to create equal opportunities. There are many factors such as infrastructure, educational systems and differences in income level that impact on how to reach and leverage the benefits of social networking.

The social network does bring Bangkok and the provinces much closer insofar as it avoids any time lag in communication between the two areas. Brands and marketers are now challenged to respond to consumers wherever they are without any delay.

So they need to focus on universal appeal with a strong brand identity.

[Laughter and tears]

Advertising still has a primarily emotional focus.

To be relevant, communication needs to target the heart of the consumer. Humour and emotion remain the two best ingredients to create a strong relationship with the audience.

Brands have three challenges:

- To emphasise a corpus of values in line with archetypes: family, love, loyalty, affection, respect, truth, sharing...
- To feature a code: comedy or pathos, levity or seriousness...
- To connect with the product or service's reality and concrete benefits.

Often, communication is at the intersection of entertainment and dreams; it must show that the product is accessible, improves daily life, corrects a defect, will create a link with others.

In countries viewing globalisation and the future as a threat (Europe, to keep it simple), advertising should position brand as antidote: nostalgia versus a scary future, the authentic versus the artificial. We can see this principle in action in France, Italy and Spain for example, where brands emit multiple signals of belonging to a tradition and a history.

Packaging designs are created to give an impression of being born in the 1930s or 1950s, produced in a small farm or in a village nestling in the mountains.

This has led Ipsos to define seven secrets of authenticity:

1. A place, possibly undiscovered, with a name that fires the imagination and is redolent of local colour and provenance.
2. Human gestures, because the product is the result of human craftsmanship, not a modern machine.
3. A family name and a first name, embodying the product's creation by a real man or woman and imbuing it with their imagined personality.
4. Prints or marks, such as those that take time to apply on fabric or emerge on wood, as opposed to the rapid rate of industrial

production. For example, a "real" cheese is never smooth, but rough-textured.

5. A date in line with the product's real or imagined origins - the 18th century for champagne, 1664 for Kronenbourg etc. An inappropriate date is a major strategic error. A famous pasta brand experienced this to its cost, vaunting its 1941 date of birth on its packaging. A year at the heart of fascist Italy and the Second World War! Even if historically accurate, the connotations of 1941 were hardly popular with consumers ...
6. A pack loaded with medals, awards, certificates etc. Even if they were awarded in the 1890s, they remain forever a sign of recognition of product quality, even if the competition has not existed for over fifty years!
7. An above-average price, but not overpriced, because the product may be rare in one sense (raw material is not infinite) but always accessible and seemingly inexhaustible in supermarkets.

The point is not whether it's true or not, old or new, but if it's beautiful or not, useful or not, meaningful or not, good or not.

This is the case in Asia in general, but especially so in Thailand where amusement and entertainment, simplicity and encouragement are the expected qualities of advertising.

Brands need to create emotional stories into which everyone can project themselves, their families or their friends. Knorr is a good example with its "Flavour of home." Each situation sounds authentic, the young soldier in the jungle, the student, the parent, each one clearly in tears. Empathy with each character works, and the brand appears in a facilitating role where we can infer the pleasure it brings without it having to trumpet its merits.

Furthermore, such stories project the Thai lifestyle of both the past and the present: Mum always cooks for her children, demonstrating a relationship which creates emotional engagement with the product: it's a matter of awareness of other people and social responsibility.

The problem now is how to manage ads given the multiplicity of media channels. Brands either need to utilise all channels to support their campaign, or isolate the best one - TV or internet, for instance?

[Boutique vs. mass]

As customers become more sophisticated (thanks to the growing middle class), they start to seek out products that are able to satisfy more than just basic functional needs. They look for “something more”. This creates opportunities for niche brands or boutique stores. On the other hand, big brands also search for ways to harness this trend.

《 **By Pakee Charoentanaporn,**
Ipsos MarketQuest 》

The boutique – striving for individuality

Nothing can define “boutique” better than the fashion industry.

Take jeans for example. Originally dominated by global companies such as Levi’s, jeans were given a luxury touch by fashion brands like Versace and Armani. But customers nowadays want a brand that’s more than just popular or even luxurious.

They want a brand that truly reflects who they are individually. And that has created an opportunity for local custom-made jeans. But these jeans were originally neither cheap nor easy to find.

Thanks to new communication platforms like social media and online communities, customers can now find local high quality products created just for them.

Take the example of Thai custom-made denim workshop Selvedgework⁵. The brand only has a single shop (at Siam Square) and prices are still certainly not cheap (starting at 6,900 baht).

Its success springs from the brand’s ability to connect with customers digitally (via its website and social media) and individually. As its website says, Selvedgework is “a blend of simplicity in form, meticulous attention to details, and celebrated individualism”. You don’t just get jeans; you get what personifies your individuality.

⁵ <http://www.selvedgework.com>

The mass – being different, but still mass

How can big brands counter this “individuality” trend?

They will not be able to create a customised product for every consumer. So how can they make you feel you’re getting something different from your next-door neighbour?

For many FMCG companies, the answer lies in the ability to create a new product segment, “premium-mass”, a more premium brand of your day-to-day personal and household product.

With the growing middle class, companies are aware that customers have more purchasing power and are willing to upgrade to higher quality products, especially if those products do not stretch their budget too much.

Unilever Thailand is a good example of applying this strategy.

After the launch of premium-mass shampoo, Tresemmé, the company decided to launch Cif, a multipurpose cleaning product, in September 2016. To a European consumer, these two brands will not sound very exciting or premium. But for local Thai consumers, they can now have access to “a European brand for urban customers who seek convenient, speedy, yet well-off lifestyles”.

In short?

The big companies are providing customers with something aspirational, yet affordable.

In future, we believe both types of player will continue to evolve. The successful boutique will become more mass (Selvedgework just opened its first department store branch) and giant mass brands will strive to appear local (Unilever launched Cif by using it to clean a tuktuk – the emblematic Thailand vehicle).

In conclusion, it’s about striking a balance between maintaining brand identity and keeping pace with changing customer needs.

Automotive: industry and symbol

The automotive industry plays a major role in the lives of Thai people and in the economy of the country.

As an industry, the current situation and short-term forecast is relatively weak. The 2016 level of domestic car sales was lower than 2015 with around 750,000 vehicles sold. The market has not yet fully recovered from the effects of the previous government's first car subsidy scheme, with its one-year boost to sales in 2012. The effect was short-term as 200,000 orders were cancelled, and the subsequent level of sales started to decline the following year.

The automotive industry plays a large part in exports from Thailand with over one million vehicles built in the country and shipped mainly to other ASEAN countries. The volume of exports was static in 2016 at around 1.2 million vehicles.

Overall, the entire automotive sector, which represents 12% of GDP, failed to grow in 2016. And weak global economic prospects will not help in 2017. The Federation of Thai Industries hopes at best for growth of 2% in 2017.

The solution may be to go for quality rather than quantity. The Thai government is eager to assist the private sector and drive the entire automotive supply chain towards more value creation. Its goal is to make Thailand a global production base for green automotive, enhancing value creation and environmental preservation both for the export and domestic markets.

This may be a wise move as anybody living in Bangkok will well wonder if we really need hundreds of thousands of additional vehicles on the streets of the capital city. Drivers in Bangkok spend on average 57% extra travel time stuck in traffic at any time of the day, according to the TomTom Traffic Index 2016.

It gets worse in the mornings, when Bangkok drivers spend up to 85% extra time in traffic, while the evening peak period slows things down even further to 114%. This makes Bangkok the second worst city in the world in terms of traffic jams behind Mexico City alone.

More cars, more traffic jams, more time wasted.

In addition to the manufacturing viewpoint, the car is a crucial part of consumers' everyday life, which also sheds light on some key cultural aspects of the country.

The chaotic traffic of Bangkok is surprisingly peaceful. Most drivers are well-mannered and polite. It is rare to hear a car honking and anger is rarely displayed. The art of living together influences even the hectic urban driving experience.

Thai drivers tend to respect others but fail to respect traffic rules.

Brave, creative, patient, polite, smiling, undisciplined and independent Thai drivers exhibit the entire range of features which also characterise Thai consumers and Thai citizens.

On the dark side, some motorists also demonstrate the inequalities of Thai society. If most drivers are polite, some owners of luxury cars behave as if a driving licence is a licence to kill and then escape.

A famous case involves the very rich scion of the Red Bull energy drink empire. Driving a Ferrari, he crashed into a policeman on a motorbike, killed him and dragged him 100 yards along the road before fleeing the scene. He then tried to get a member of his family's staff to take the blame. Despite all evidence Vorayuth was released on bail. He left Thailand for Singapore and will probably never spend a night in jail.

A more farcical incident recently involved the driver of a trendy Mini Cooper. He was incensed after a motorbike taxi made minor contact with the tail light of his car. He punched the motorcyclist and dragged him over to prostrate himself in front of his "dream car". A video clip made the incident famous within hours. Forcing a man to pay respect to a car epitomises the bad behaviour of some rich people towards the poor.

[Luxury]

Opportunities and challenges in the Thai luxury market

The luxury market in Thailand, estimated at US\$ 2.5 billion is the largest in Southeast Asia.

Luxury development is driven by several positive factors:

- Luxury is linked to a long tradition of highly skilled craftsmen working for the royal family. Traditionally, it was more a way of life than a way to be noticed or to flaunt success.
- The development of the middle class has grown the number of consumers. The appreciation of luxury among Thai consumers is higher than in mature markets and other emerging countries.
- The development of lavish new commercial centres, partly or totally dedicated to luxury goods, has attracted more than 100 global brands to join the Thai market in the last two years.

These developments have led Ipsos to add Thailand to the group of countries included in the World Luxury Tracker (WLT).

The first wave has brought some interesting insights.

- Thai luxury consumers claim to be highly patriotic but love to buy abroad. More than half their expenditure occurs outside Thailand. This is particularly true of perfume, watches and leather goods. France is the most attractive country followed by the UK and Italy.
- 'Made in Thailand' is still less glamorous than 'Made in Europe, USA or Japan'. No Thai brand can yet achieve more than 10% awareness. Preferred brands are no different from other emerging markets: Louis Vuitton, Chanel, Gucci.
- Some expectations have yet to be fulfilled: the most affluent expect an extraordinary in-store experience and customised after sales services.

Brands and retailers are facing a difficult choice. How to become more accessible, yet stay exclusive and desirable? This delicate balance is even more difficult to maintain within the new digital world.

The digital world, whether it be through a brand's own website, its third-party partners, or social media, has dramatically increased the amount of exposure that brands and their products receive. While seemingly positive, this can be a double-edged sword in the luxury market: digital exposure can go a long way towards increasing brand awareness, but it can also lead to consumer fatigue.

WLT 2016 reflects some signs of individualism and also a trend to reduce spending.

Across emerging markets the Tracker has identified four major trends:

Uniqueness

Over the last few years, market saturation has set in, due to mass strategies and luxury brands racing to occupy the field.

Today consumers expect exclusivity and customisation through authentic, high-quality products. 90% of respondents (up 3% since 2014) say that luxury brands should "first and foremost offer products of superior quality". In addition, 79% say the ability to customise products is important. This expectation is particularly high in China and Thailand at 90% and 88% respectively.

Brands need to showcase their history, heritage and know-how. They have to prove that their products are exceptional and they have to work on this notion of exclusivity.

Adventurousness

Ownership is no longer a major driver for the purchasing of luxury products. Consumers want to dream and escape. 76% of respondents said that when they buy a luxury brand, they are seeking "an unforgettable experience" (up 6% since 2008). Once again, this expectation is particularly strong in China and Thailand (90% and 93%).

This hope for a special experience revolves around exceptional service, where all the senses are stimulated: 88% (up 2% since 2014) say it's essential to improve the level of service to remain or become a favourite luxury brand.

Seamlessness

While the purchasing process should be an unforgettable adventure, it should nonetheless remain as smooth and easy as possible.

Waiting for any length of time is no longer acceptable and delay should be minimised. New approaches adopted by brands such as Burberry, which makes its collections available at the end of each fashion show, satisfy this quest for seamlessness.

Thoughtfulness

Consumers are now turning more to smart, inspiring luxury goods and services. Luxury is less and less often perceived as a “sign of social success”. Even though this still applies to 74% of respondents, it has dropped 5% on average compared to 2008, most notably in Korea (down 11%) and Brazil (down 12%).

Today, consumers expect luxury brands to be more ethical and attentive to their needs. This is reflected in particular in the creation of discussion forums between consumers and experts (Armani with its Tweet Talks and Vogue with its Fashion Festival).

There is an expectation for these brands to be more innovative: 75% of respondents (up 3% since 2008) want “creative and bold products”. Proportions are very high in China (89%), Russia (87%) and Thailand (90%).

The two trends impacting Thailand most strongly are Uniqueness and Adventurousness. Under influence of the millennials, consumers are clearly becoming more individualistic. The three key expectations of luxury are: personal reward (91%), expressing one’s personality or style (89%) and putting oneself in a good light (89%).

Finally, there is clear concern regarding the economic environment (a 10% negative shift), with 64% in Thailand saying they are trying mainly to save money, the highest proportion across emerging markets.

[Prospects]

5 Trends & 3 Challenges

⟨ By Jérôme Hervio ⟩

[5 trends]

In a fast-changing world, it is difficult to predict precisely what will happen to Thailand in the future. However, a few trends are without doubt going to impact the country.

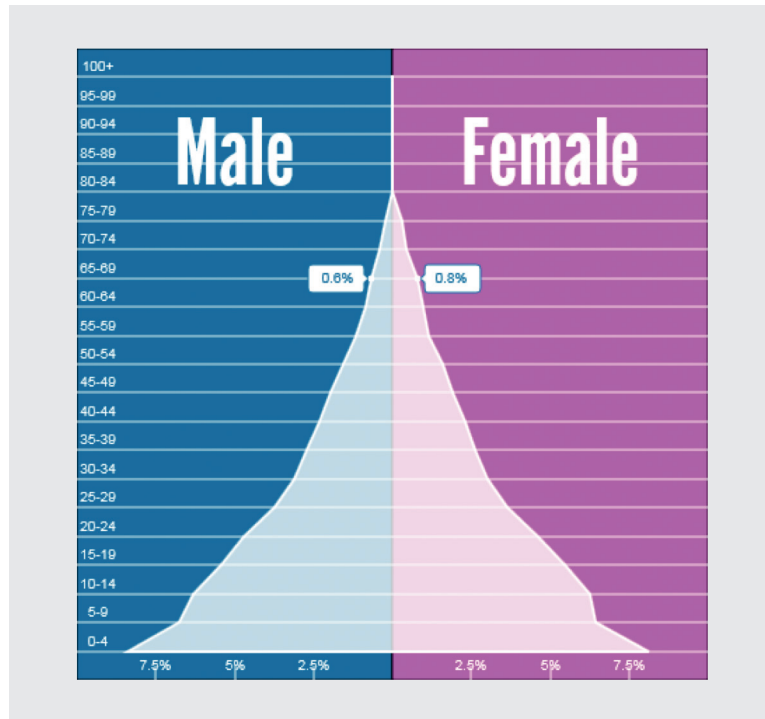
We need to understand the impact of these trends on the economy, society, brands and marketing.

Trend n°1: The ageing population

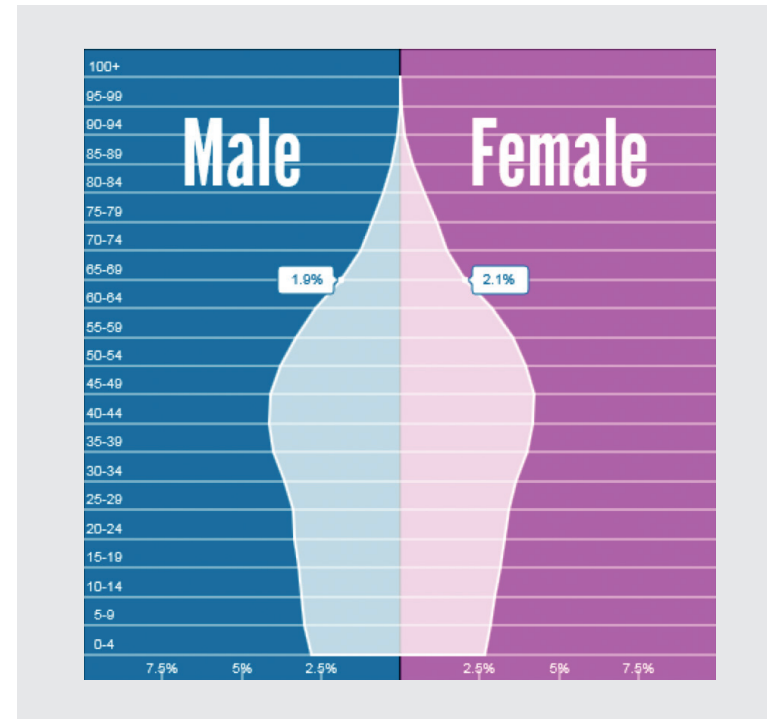
Demography⁶ tells us that the country is ageing and also that the total population may decline from 2023 onwards.

⁶ Source: United Nations, Department of Economic and Social Affairs, Population Division. World Population Prospects.

Thailand 1950.
Total population: 22.625 million

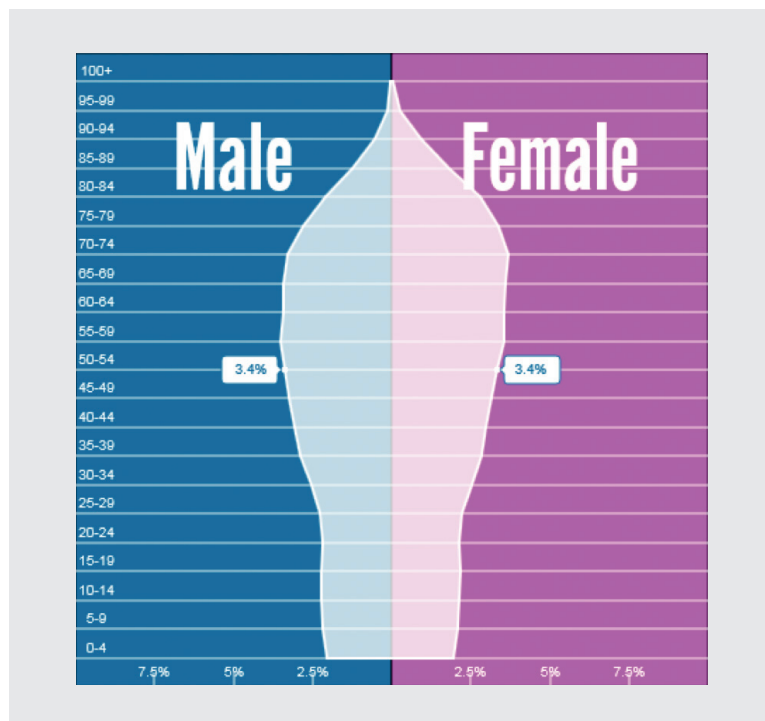


Thailand today.
Total population: 67 million



Thailand 2050.

Total population: 62.5 million



A declining population may bring some short-term savings as there is less need to develop education, public transport or housing.

The average standard of living in a declining population, at least in terms of material possessions, will tend to rise as the amount of land and resources per person is greater. Per capita GDP growth will be higher than overall GDP growth.

Nonetheless, most of the impact on the economy is likely to be negative.

The example of Japan shows that a declining population tends to lead to deflation. A reduced number of taxpayers limits the ability to support social welfare.

The younger generation will feel increased social and economic pressure. For example, fewer schools, stores or sports facilities will be built or maintained.

The impact is clear for some industry sectors:

- Mainly negative for FMCG, real estate and any categories targeting younger consumers.
- Possibly positive for luxury goods, healthcare and tourism.

The older generation of seniors (60 to 65 in 2015) has witnessed social transformations that have not necessarily impacted its value system.

The new generation of seniors (which will attain the same age in fifteen years' time) was born during the expansion of the consumer society and into a different cultural context.

It will have more enthusiasm for technology, cosmetics and sports. If they have the resources, the new seniors will strive to remain active and inwardly youthful. They do not want to hear about diseases or the ravages of time. They want to stay beautiful and attractive, and project the best possible image.

There will be a peripheral benefit in the furniture and automotive markets, but priority should be given to aesthetics, quality of materials and performance.

Ageing is directly related to diseases and the need for their prevention. This is a very sensitive issue involving strategies to circumvent the effects of age.

An Ipsos survey for the Association of Urologists in France shows that talking about health is not the best way to alert the male audience about prostate disease. It is much more efficient to connect prostate health with intact sexual efficiency promising long-term potency and even the ability to seduce.

In other words, any reference to age should be excluded, or needs to be as elliptical as possible.

The acceleration of scientific progress and genetics, combined with artificial intelligence, is irreversible. Short of promising immortality, it pushes the boundaries of imagination and imposes an ideal of intelligence and performance that breaks down barriers between young and old.

An ageing population is also a public awaiting customisation and social linkage. Customisation, because marketing increasingly uses and develops tools targeting specific consumers. Social

networks and all their interactions, because seniors don't want to grow old in the solitude of big cities, especially in the anonymity of the megalopolis that Bangkok will become.

The new seniors' keyword will be **"Fun!"**

Trend n°2: The continuous rise of the middle class

Despite recent difficulties in the economy of the country, there is no doubt that the size and role of the middle class will continue to grow.

The World Bank upgraded Thailand's income categorisation last year from a lower-middle to an upper-middle income economy.

World Bank senior economist Kirida Bhaopichitr commented on the decision: *"The upgrade is in recognition of Thailand's economic achievements in the past decade, in which GNI per capita has almost doubled, while poverty has been significantly reduced"*.

While they are still not wealthy enough to spend as much as they would like, consumers from the emerging middle class are a strong force in driving consumption.

This group lying between rich and poor is also considered as a driver of democracy, given its strong attachment to the rule of law and its demands for greater accountability in government.

The core and upper middle classes have sustained a long period of growth.

A more recent major source of middle class development involves its lower tier, which has seized the opportunity to climb the income ladder by moving and changing jobs.

A farmer from Isan (northeastern Thailand) can increase his income by over 50% by taking a job in construction in the same region. If he moves to Bangkok, he can double his income. If he develops enough skills to work in a factory, he can earn about 30% more than he could in construction. He will have reached the lower middle class.

The middle class is a driving force across several categories: FMCGs, electronics, condominiums, fashion, tourism, shopping malls, restaurants and all premium products.

The middle class holds the key to growth and success. Its appetite is for novelty, status, differentiation and increasingly sophisticated beauty products and services as long as they remain accessible in financial terms.

The condominium market is interesting from this point of view: if the lyrical wording of advertising for real estate is coupled with an unaffordable price level, the dream of the middle class will remain... a dream.

"Iconic", "amazing", "futuristic", "reinvented", "remarkable", "unique", "noble" and other such epithets do not really help, considering the actual purchasing power of commercial targets.

Automakers have understood this: they balance the aesthetics of images, the beauty of their models and sets, the elegant lines, with price and credit terms which can make the dream real. Emphasising a monthly budget (as smartphones do) also helps accessibility.

Maintaining this balance will be crucial to keep up with this priority target.

Trend n°3: The integration of ASEAN and the role of CLMV

One year after the launch of the ASEAN Economic Community, the impact on Thailand's economy has not been spectacular.

For ASEAN member countries, 2016 promised a mixed bag with the World Bank forecasting lower growth for Thailand and Malaysia. At the opposite end of the economic performance chart are Myanmar, Lao PDR, Vietnam, the Philippines, and Indonesia, all of which were forecast to continue experiencing strong growth.

In business meetings, the acronym CLMV - standing for Cambodia, Laos, Myanmar and Vietnam - is heard more often these days than ASEAN.

The short-term opportunities here are more obvious for Thailand. Thai companies are heavily investing in and exporting to CLMV.

The value of Thailand's trade with CLMV doubled in the five years to 2012. Thailand's exports to CLMV rose from 3% of total in 2000 to 8% in 2012 according to Bank of Thailand (BOT) statistics, and are now higher than the value of exports to Europe. They are set to overtake exports to the US shortly, according to Bangkok Bank Ltd.

In contrast to other ASEAN economies, exports to CLMV tend to be less volatile, given the higher share of necessary goods such as fuel and consumer items, states the BOT.

CLMV represents high potential for the future as its middle class is growing rapidly. One condition will be the development of infrastructure to take full opportunity of the central geographical situation of Thailand.

A strong political will is also required. The CLMV countries have launched a single visa initiative which Thailand has so far refused to join.

Trend n°4: E-commerce and the digital society

Thailand is not a hi-tech country in terms of mindset, but it is keen to embrace technical developments if they bring convenience, excitement, or sources of business. Thai citizens are among the most engaged internet users in Asia.

The next development will involve e-commerce. A study conducted by the Thai Market Research Society at the end of 2015 showed that Thai consumers welcomed the idea of buying from the comfort of their homes. 71% of smartphone users have experienced online purchasing.

Based on levels of purchase intent, penetration could grow to nearly 90%. And the potential is not limited to Bangkok and younger age groups. Upcountry consumers and middle to older age groups show a strong interest in e-commerce.

The current limitation of e-commerce reflects mixed experiences: nearly all users have experienced some dissatisfaction.

The main problems include products differing from expectations, late delivery, inability to return products and difficulties in payment.

The government appears strongly committed to address these hurdles by improving infrastructure and developing a government-sponsored e-payment system.

Alibaba Group Holding Limited has demonstrated its confidence in the development of e-commerce in Thailand and Southeast Asia by making its largest overseas investment, with a US\$ 1bn deal for control of Lazada.

The TMRS study points to the strong growth of e-commerce having a short-term impact on fashion, clothes, electronic goods and cosmetics.

In the medium and longer term, packaged goods, fresh food and beverages will also switch partly to e-commerce.

The decision between buying online or offline will depend on the nature of the product or the expected service.

Online is the home of pure speed and instant gratification. It's the world of "ever faster". Robotised warehouses, customer geolocation, artificial intelligence assistance tools, delivery by drone to the destination (home, office, restaurant etc.). "Wherever I am and whenever I want" - our motto for this trend is all about acceleration.

Offline is the home of experience and emotion. Location, decor, merchandising, quality of reception and advice, listening skills, the ability to view things from the customer's perspective, respect, kindness and the Thai smile; all these codes that characterise luxury stores today will extend tomorrow to all types of outlet in the physical world to attract and retain custom.

Trend n°5: The irresistible development of Bangkok

Bangkok, with its population of 9.3 million people (UN estimate) plays a disproportionate role in wealth distribution, political influence and spending in most categories within the Thai economy.

This will continue and likely increase in the short and medium term.

The McKinsey Global Institute estimates that Bangkok GDP will rise from US\$ 105 billion in 2010 to US\$ 300 billion in 2025. The corresponding GDP per capita will grow from USD 28,000 to US\$ 51,000. This is well above the current levels of Germany, France or the UK. It also explains the proliferating development of luxury condominiums and malls in the capital.

It also indicates a possible prominent role for Bangkok in Southeast Asia.

Still quoting the McKinsey Global Institute, the GDP per capita in Bangkok in 2025 will be three times higher than Manila and Ho Chi Minh City, twice as high as Jakarta and 20% above Kuala Lumpur. Only Singapore will remain higher.

More than a just a megacity, Bangkok has a chance to become a hub for luxury goods and a cultural capital.

The development of art galleries, ephemeral exhibitions (pop-up galleries), and media coverage of the arts has continued to progress.

The artist Korakrit Arunanonchai has been exhibited in New York, London and Paris. In London, the Saatchi Gallery showcased the creations of contemporary Thai artists with its **“Thai Eye”** in early 2016, an exhibition that has traveled to several cities, including the Bangkok Art & Culture Centre.

There is no doubt that development of the arts positively impacts the economy, as demonstrated by the recent establishment of the Faculty of Communication Arts at Chulalongkorn University.

Just as there is a Thai touch in advertising, the Thai cultural touch will contribute to the creation of value in Bangkok.

If we place these points in the context of higher average income in Bangkok in the coming years, it leads to the emergence of a new form of patronage and sponsorship.

One can even envisage cultural creation encouraged by start-up businesses or independent art lovers, rather than by large companies or ultra-rich oligarchs. In the future these new sources will have the resources to invest in artists, giving them the means for success founded on uniquely Thai artistic expression.

This is a major point to anticipate. Where will Bangkokians of the upper middle class invest their money? In the traditional statutory signs of success (watches, cars, clothing, fine furniture, etc.), or in riskier sectors, such as the arts?

[3 challenges]

Challenge n°1: Tackling inequality

The TDRI (Thailand Development Research Institute) has released several analyses of inequality in Thailand.

For the TDRI, inequality is a distinctive characteristic of the country: *“The rich and poor gap in Thailand is bigger than in similar-sized economies, such as Colombia, Brazil, Malaysia and Indonesia.”*

In fact, Thailand is the only one of these countries to see an increase in inequality in recent years, whereas the others saw a narrowing of the gap. Thailand is among the top countries in the world in terms of income disparity, with money concentrated in the hands of a small, wealthy group”.

The facts are clear, and remedies are under discussion among economists and politicians:

- Some point to a relatively low-level ratio of tax to GDP (around 17%), and a bias in government spending favouring Bangkok. Not enough is done for rural populations.
- Others criticise the populist policies of previous governments. Thammasat University economics lecturer Pawin Siriprapanukul agrees, saying Thailand’s spending has not paid off in economic growth as much as it should have. Though policies such as the 30-baht health care scheme and the village fund were effective, the first-car subsidy and rice-pledging schemes were not.

The Gini coefficient is a key measure of inequality. The more equal a country's income distribution, the lower its Gini index. It now stands at 45 for Thailand. It was only 39 two decades ago.

Beyond politics, most agree that inequality is a major obstacle to escaping the middle income trap. As export-oriented growth no longer works, there is a need to boost domestic demand.

Challenge n°2: The health challenge

The Thai health system has some bright spots but will face certain difficulties.

From the World Bank:

- Under Thailand health schemes, 99.5% of the population have health protection coverage.
- Thailand achieved its near-universal coverage with relatively low levels of spending on health but it faces significant challenges: rising costs, inequalities, and duplication of resources.
- The government budget share allocated to health is high and steadily increasing and this trend is difficult to sustain in the long term.

The major problem will come from the increase in the older age group: The proportion of older persons in the total population is expected to reach nearly 20% in 2025 and nearly 30% by 2050.

Another issue is linked to changes in lifestyle and diet, translating into increasing incidence of overweight and obese Thais.

Thailand is ranked second only to Malaysia for its obesity rate in the ASEAN region, and has the highest absolute number of people with the disease. It is among the top five Asia-Pacific nations with high numbers of obese people, and since 2015 Thailand has had a whopping 21 million members of the "fat tummy network", according to the Ministry of Public Health.

Younger generations are not immune. According to a 2015 Public Health Ministry survey, the obesity rate among children in pre-primary school classes had risen by 36% compared to a study undertaken five years earlier.

The ability of healthcare services to cope will be decisive, together with personal lifestyle choices.

On the other hand, healthcare combined with tourism is also a growing opportunity. Foreigners seeking treatment for everything from open-heart surgery to gender reassignment have made Thailand a popular destination for medical tourism, attracting nearly 3 million patients in 2015.

Bangkok can claim to be the most popular place for medical tourism in the world. The trend is lucrative too. Medical tourism in Thailand is growing at a yearly rate of 16%, while in financial terms the foreign medical services sector is expected to make a massive 100 billion baht.

Challenge n°3: Environment: A wake-up call for Thailand?

Flooding, drought, rising temperatures: signs of increasingly serious environmental degradation are clear.

Apart from climate change, Thailand is also facing several other environmental problems:

- Intensive farming: pesticides, herbicides, fertilisers and irrigation.
- Water pollution: urban runoff, ship transport, untreated sewage, septic tanks, animal dung, manure spreading, acid rain, and eutrophication.
- Air pollution: transportation, factories, forest fires, aircraft, petrol stations, smog, slash-and-burn farming.
- Resource depletion: overfishing, deforestation, water shortage, land degradation, soil desertification, habitat destruction, and biodiversity loss.
- Waste generation: e-waste, medical waste, household waste, industrial waste, marine debris, river dumping, and landfill.

Successive governments have taken some measures. The AEDP (Alternative Energy Development Plan) focuses on power generation from waste, biomass and biogas as a priority. Solar and wind power will be promoted "at a later stage... once the cost is competitive with the power generation from Liquefied Natural Gas (LNG)".

The aim is to increase renewable energy's consumption share of final energy consumption from 8% to 20% by 2036.

This may sound like too little too late.

Thai citizens are sensitive to water resources and deforestation, but pay less attention to waste management.

Before the '90s most waste was dumped in open areas. Today around 20% of the 50,000 tons of urban waste generated every day is recycled.

Thai people are addicted to plastic bags. From the Department of Environmental Quality Promotion (DEQP) recently, plastics account for 20% of all garbage. Thais use an average of eight plastic bags per person per day.

Tackling environmental issues requires measures from the government, but more importantly a change in consumer mindset.

It may seem amazing that people who carve fruit and vegetables into delicate and enchanting forms can remain indifferent to klongs dotted with plastic bottles and waste of all kinds, which is painful to see and smell, and causes flooding among other problems.

In other countries, plastic bags are banned, and those who drop their waste in natural surroundings have to pay fines, while schools teach the need to change behaviour.

The ecological, aesthetic and economic benefits are obvious. This collective challenge can prove profitable through recycling and socially useful by creating alternative jobs, as well as necessary in terms of public health.

[A song: Blue Day]

Blue Day
There's no sunshine.
Why must you go away,
Leaving me here alone?

My own.
How I miss you
With loving heart so true!
That's why I feel so blue.

Dear one,
What's the good of
Days without the sun,
Or peaceful nights
Without the moon?

But soon
No more blue day.
Whenever I meet you
Then all my dreams come true.

Blue day
Gloomy blue day,
When you are far away,
Why must we be apart?

Sweetheart,
Dear, I love you
With all my heart, I do
That's why I feel so blue.

My love,
Skies are so grey,
Cloudy up above,
Dear won't you please
Come back to me?

There'll be
No more blue day.
Again the sun will shine.
That day I'll make you mine.

*Music: H.M.K. Bhumibol
Adulyadej*

*Lyric: H.H. Prince
Chakrabandh Pensiri*

*© His Majesty King
Bhumibol of Thailand*

Realisation: Ethane
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