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EXTRAORDINARY AND UNCONVENTIONAL

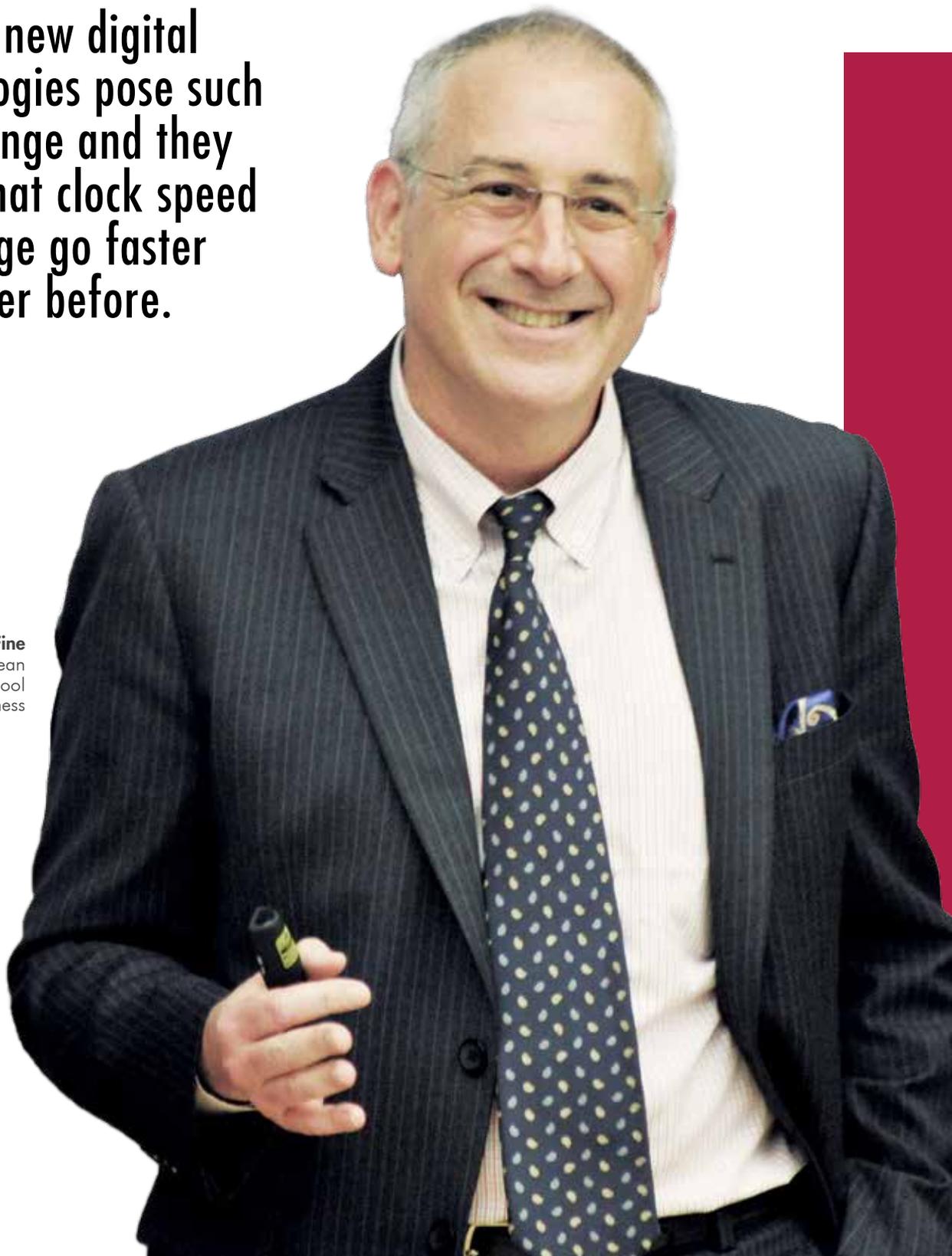
## ALL-ASEAN BRANDS STRONG ON SOCIAL

REPORT 2017



**Today's new digital technologies pose such a challenge and they make that clock speed of change go faster than ever before.**

**Charles H. Fine**  
President and Dean  
of the Asia School  
of Business



# FOREWORD

All advantage is temporary. On every level: the advantage of a region, of a country, of a company, of a brand. Coming to Malaysia and the ASEAN region, I have always wondered how a country and a region blessed with natural resources and full of admirable, long-lasting traditions copes with the disruptive changes in a globalizing world. Today's new digital technologies pose such a challenge and they make that clock speed of change go faster than ever before. How this change plays out in exciting emerging markets, like the ASEAN region where more than 200 of the 650 millions consumers have gone digital, is a critical question, as are which brands will be to keep up with Digital disruption and which brands can take a leading role in making the ASEAN a more integrated marketplace?

To address these questions, this report puts two hypotheses to the test. First: Are Homegrown ASEAN brands winning on their own home turf and do they materialize a home-base advantage?

**Not yet:** Unfortunately, more than 95% of ASEAN homegrown brands do not yet leverage their homebase to succeed in neighboring ASEAN markets. This report does find that for social media engagement many homegrown brands succeed in winning the home market preference, but a lot of them fail in capturing the hearts and minds of consumers in neighboring ASEAN-host markets. With the exception of the 12 leading ASEAN brands, it is primarily international brands that still seize the opportunity of Social in ASEAN.

The second hypothesis put forward by this report is: Does Social show signs of market homogenization across ASEAN markets? And, does the ASEAN region provide an increasingly level playing field for brands?

**In Part:** Interestingly, the seven strongest brands across the ASEAN region are international icons and are represented in the three most prominent product categories for many ASEAN consumers: Food, Fashion and Phones. This study finds that the leading group of international brands is closely followed by 269 other Homegrown ASEAN brands. These brands, however, have taken solid positions in the ASEAN-shared categories, primarily in their own home markets.

As we expect to witness more and more ASEAN brands seeking to cross international borders in the search of growth, they must take on not only the international rivals present in their home market, but also develop their international market capabilities to better understand their seemingly similar but different neighbor-consumers. Globalization, regionalization and Digital create a whole new set of questions for ASEAN corporate leaders and managers to examine. One of those issues is how to deal with the rapid growth of these disruptive developments and the unmet brand preferences of ASEAN consumers? For the competitiveness of a brand, a firm, a country, or a region, it is very much about mastering the fast pace of change. We, at Asia School of Business, focus on building that new generation of transformative and principled leaders to stay ahead of the curve. In the future, our school's research agenda will conduct and publish research and reports on the managerially relevant topics of Change-making, Innovation, and Entrepreneurship in Emerging Markets.

**Charles H. Fine**  
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[www.allaseanbrands.com](http://www.allaseanbrands.com)

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# EXECUTIVE SUMMARY

It is the 650 million consumers who make the ASEAN\* member states one of the world's largest regional consumer markets; a market that is home to 200 million digitized consumers with Internet access, fueling a US\$50 billion Internet economy that is very big on Social (social media and games). While both Social and Mobile are increasingly important in the region, the brands which are actually winning in the ASEAN digitized market environments have, thus far, been an unknown. Firstly, this report addresses that unanswered question by dealing with the strength of ASEAN brands operating in the Social realm. Secondly, this study provides insights into the on-going homogenization of these ASEAN markets by investigating brand preferences across the various ASEAN economies. We use engagement on Facebook as a measure for the power of the brands. Our study examines and compares the Top100 Brand rankings based on Facebook Likes in ASEAN countries.

## Which ASEAN Brands Win on Social?

- **Brand Diversity:** Overall, 435 different brands manage to obtain a Top100 position in the Social rankings of at least one of the six largest ASEAN economies.
- **Solid Core of Homegrown ASEAN Brands:** The majority of brands leading on ASEAN Social are Homegrown ASEAN brands (269, 62%): 35 are Malaysian, 30 Singaporean, 33 Indonesian, 58 Thai, 45 Filipino and 68 Vietnamese.
- **International Brands Leading on ASEAN Social:** There are 168 international brands are from other markets that managed to gain a top position on Social in at least one ASEAN market: 40 brands from other parts in Asia, 56 from the EU, 59 from US / Canada and 22 from the rest of the world, or ROW, from a total of 34 countries.

## Is the Market Homogenization of ASEAN Visible on Social?

- **All-ASEAN Brands:** There is a select group of seven brands that have succeeded in occupying a ranking in the six largest ASEAN economies: Zalora, Lazada (Germany / Singapore), Adidas (Germany), Samsung (South Korea), Coca-Cola, KFC and Pizza Hut (US).
- **Variety in Openness:** Some ASEAN markets have more international brands than others in their Top 100 ranking. At least 65% of the Top 100 brands are international companies in Singapore, Malaysia and Indonesia, while Vietnam and Thailand have primarily local brands in their top rankings – 58% and 68%, respectively.
- **International Brand Glue:** Of the 168 international brands, 66 are top-ranked in more than one ASEAN market while 19 brands from other parts of Asia (48%), 20 from US / Canada (34%), 22 from the EU (41%) and five from ROW countries (25%).
- **ASEAN Brand Frontrunners:** A group of 12 Homegrown ASEAN brands manage to occupy a top-ranked position in another ASEAN market other than their home base.
- **Communal Categories:** The ASEAN-6 consumers share an interest in certain brand categories. The three prime categories shared across the ASEAN-6 are: Food, Fashion and Phones, each of which has more than 10 brands in the rankings. Fashion is particularly strong in Vietnam. Food is the number one category for Singapore, Indonesia, Thailand and the Philippines. In Malaysia there is a tie between Food and Fashion.

\*ASEAN, or the ASEAN-6, includes the countries of Malaysia, Singapore, Indonesia, Thailand, Philippines and Vietnam. A broader definition is included in the following Introduction.

## THE STUDY'S EIGHT FINDINGS INCLUDE:



### Which ASEAN Brands Win on Social?

1

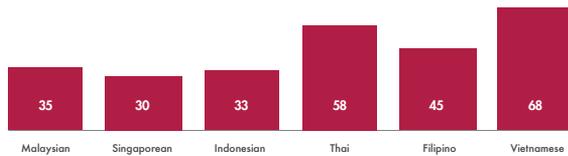
#### BRAND DIVERSITY

Overall, 435 different brands manage to obtain a Top100 position in the Social rankings of at least one of the six largest ASEAN economies.

2

#### SOLID CORE OF HOMEGROWN ASEAN BRANDS

The majority of brands leading on ASEAN Social are Homegrown ASEAN brands (269, 62%): 35 are Malaysian, 30 Singaporean, 33 Indonesian, 58 Thai, 45 Filipino and 68 Vietnamese.



3

#### 168 INTERNATIONAL BRANDS LEADING ON ASEAN SOCIAL

There are 168 international brands are from other markets that managed to gain a top position on Social in at least one ASEAN market: 40 brands from other parts in Asia, 56 from the EU, 59 from US/Canada and 22 from the rest of the world, or ROW, from a total of 34 countries.



### Is the Market Homogenization of ASEAN Visible on Social?

4

#### ALL-ASEAN BRANDS

There is a select group of seven brands that have succeeded in occupying a ranking in the six largest ASEAN economies: Zalora, Lazada (Germany / Singapore), Adidas (Germany), Samsung (South Korea), Coca-Cola, KFC and Pizza Hut (US).



5

#### VARIETY IN OPENNESS

Some ASEAN markets have more international brands than others in their Top 100 ranking. At least 65% of the Top 100 brands are international companies in Singapore has 74%, Malaysia 65%, Indonesia 67%. (Philippines has 57%), while Vietnam and Thailand have primarily local brands in their top rankings — 68% and 58%, respectively.



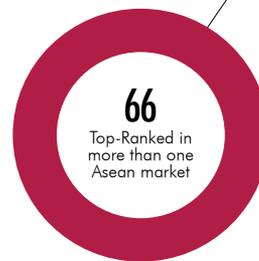
International Brands Malaysia, Singapore and Indonesia



6

#### INTERNATIONAL BRAND GLUE

168 INTERNATIONAL BRANDS



Of the 168 international brands, 66 are top-ranked in more than one ASEAN market while 19 brands from other parts of Asia (48%), 20 from US / Canada (34%), 22 from the EU (41%) and five from ROW countries (25%).

7

#### ASEAN BRAND FRONTRUNNERS

A group of 12 Homegrown ASEAN brands manage to occupy a top-ranked position in another ASEAN market other than their home base.

12 HOMEGROWN ASEAN BRANDS

8

#### COMMUNAL CATEGORIES



The ASEAN-6 consumers share an interest in certain brand categories. The three prime categories shared across the ASEAN-6 are: Food, Fashion and Phones, each of which has more than 10 brands in the rankings. Fashion is particularly strong in Vietnam. Food is the number one category for Singapore, Indonesia, Thailand and the Philippines. In Malaysia there is a tie between Food and Fashion.

# INTRODUCTION



The ASEAN region represents almost 10% of the world's consumers, some 650 million consumers — 200 million more than in NAFTA and outnumbering the EU by more than 100 million people. This regional consumer market is one of the largest in the world and home to 200 million digitized consumers with Internet access, driving a US\$50 billion e-commerce economy that is big on social media and games. While Social and Mobile are increasingly important in the region, it is still unknown which brands are actually winning in the ASEAN digitized market environments. This report addresses that unanswered question and deals with the strength of brands operating in the ASEAN region on Social. This study also provides insights into the on-going homogenization of ASEAN markets by investigating brand preferences across the ASEAN economies. We use engagement on Facebook as a measure for the power of the brands.

## Which ASEAN Brands Win on Social?

Previously, we posted blogs regarding ASEAN brand preferences in the six largest economies in the region: Indonesia, Thailand, the Philippines, Malaysia, Singapore and Vietnam. Considering brand power on an international level allows us to truly measure the brand equity, as country specific characteristics no longer matter. It also demonstrates the ability of the firm to be competitive in the global marketplace.

Overall, there are 435 unique brands that manage to obtain a position in the Top 100 Social rankings of at least one of the ASEAN economies. No less than 269 of these brands (62%) are Homegrown ASEAN brands: 35 of those brands are Malaysian, 30 Singaporean, 33 Indonesian, 58 Thai, 45 Filipino and 68 Vietnamese.

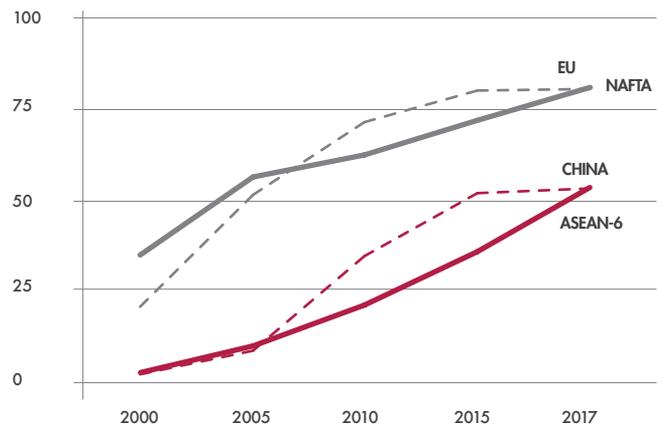


**Objective 1:**  
Identify which ASEAN Region Brands Win on Social Economic Integration in ASEAN and Consumer Brand Preferences

The combined GDP of all 10 ASEAN member states (whose collective citizenship accounts for 8.6% of the world's population) is US\$2,438.12 billion, comprising 3.3% of world GDP. Many of the world's economies have a relatively low GDP per capita. To grow levels of economic prosperity and make ASEAN's open economies more resilient to external shocks in world trade, regional cooperation aims to develop its 10 participating countries to be one of the world's leading economic areas; the region's trade tariffs have been gradually decreased with the goal of leveling them off to 0-5%.

With the large number of 269 Homegrown ASEAN brands, consumers participate in building a promising foundation for economic regional integration. The shares of Homegrown Brands vary between 33% and 68% among the countries. Only nine Homegrown ASEAN brands managed to obtain over one million Likes from abroad. With respect to the homogenization of brand preferences in the ASEAN region, two findings point in opposite directions. Firstly, 12 brands managed to secure a position in the Top 100 of another ASEAN country. However, the consumers in all six countries have similar category preferences. The countries share an interest in brands within the categories Food & Fluids, Fashion and Phones. Moreover, several countries share some other common categories as well. The same international brands get much engagement throughout the ASEAN region. As can be seen in Graph 1, the penetration of the Internet in ASEAN has grown consistently in the past decade.

**GRAPH 1: INTERNET PENETRATION IN ASEAN**



Source: Internet Live Stats

This year, ASEAN reached the point where the majority of people have access to the Internet. This was achieved after seven years of accelerated growth — a growth rate that has not slowed down, allowing the closing of the digital divide within their own markets, as well as with more developed regional markets such as the EU and NAFTA, which have a rate of more than 80%.

It is important to understand consumers within the internal ASEAN market. If the countries remain segmented markets firms have to apply different strategies for each country. This complicates entering multiple ASEAN markets for both firms from other ASEAN countries and international ones, lowering foreign investments and making the creation of an integrated economic region more difficult. Regionalization of ASEAN goes beyond eliminating trade barriers and promoting foreign direct investments into each other's economies. Ultimately, further brand preference homogenization results in appreciating and liking each other's brands.



**Objective 2:**  
Assess the Level of Market Homogenization with Regard to Category and Brand Preferences of ASEAN Consumers

The second objective of this report is to assess the level of homogenization with regards to category and brand preferences of the ASEAN consumer. Similar brand and category preferences among consumers from the six countries may indicate similar market structures, which, in turn, facilitate

market access for international firms. Furthermore, brands of other ASEAN countries should be prominent in the Top 100. This objective helps gain a better understanding of the internal ASEAN markets and the brand preferences of its consumers.

The remainder of the report includes a discussion about All-ASEAN brands, providing an overview of the shared brand preferences and categories common in the ASEAN region. The overview is followed by segments focusing on the specific brand preferences of consumers in each of the six ASEAN economies. The report continues with a comparative analysis of these countries, complemented by descriptions of international brand-owning firms performing well in multiple ASEAN country markets. Finally, the last portion of the report presents the conclusions and answers to the two main research objectives.

### Collecting Data from Facebook

The Top 100 of the Most Liked Brands in ASEAN's six largest economies is used to investigate consumer behavior. The information on the number of Likes the brands have on Facebook has been retrieved using SocialBakers. Only commercial brands are considered here, as we aim to better understand the brand preferences of consumers in the region. We use the number of Likes from the country of interest to construct the ranking. The total number of Likes the Facebook page has from all over the world has also been collected. Brands needed the following number of Likes in order to get into the top 100; for Malaysia 388,000 Likes, Singapore 63,435, Indonesia 1,054,116, Thailand 660,667, the Philippines 1,023,643 and Vietnam 500,000. The other variables of the 100 brands are the country of origin, the parent company and the brand category. Brands with two countries of origin are considered to be part of both countries. If the firm is a wholly owned subsidiary, the owner is considered the parent company. The brands are categorized on a basis of the main set of goods and / or services they offer. Brand categories include Fashion, Phones (Consumer Electronics), Finance, Physique (Personal Care), Furniture and the like.

### Defining ASEAN

ASEAN consists of 10 member states, of which six are responsible for a major share of the region's economy. These six countries are: Malaysia, Singapore, Indonesia, Thailand, Philippines and Vietnam, generating a combined yearly GDP of US\$2.332 billion, an astonishing 96% of the whole region. Due to this economic power, our focus is on the ASEAN-6 region. We refer to the ASEAN-6 as ASEAN unless indicated otherwise.

# ALL-ASEAN SOCIAL BRANDS\*: UNITED BY FOOD, FASHION, AND PHONES

Ten wise men standing shoulder-to-shoulder and crossing both their arms over their chests to shake the hands of their neighbors — this is how ASEAN leaders pose to symbolize ASEAN unity for stronger collaboration and economic integration. The call for ASEAN collaboration seems louder than ever. Today's damaging concerns of 'de-globalization,'<sup>1</sup> manifesting in the form of growing protectionism and isolationism, threaten the open economies of the nearly US\$2.5 trillion ASEAN economic block.<sup>2</sup> The uncertainties of Brexit, an economically-weak and politically-divided EU, the swell of anti-trade politics in Trump's presidential campaign and Administration, in addition to an escalating standoff between China and its trading partners over the alleged dumping of goods at prices below cost, hurt the Association of Southeast Asian Nations (ASEAN) disproportionately; in fact, more so than in any other economic zone, due to the ASEAN openness to strong trading and the block's investment ties with the rest of the World.

Figure 1: ASEAN Leaders pose to symbolize for stronger collaboration and economic integration



Currently, 23 – 24% of the exports and imports of ASEAN goods with other ASEAN neighbors is still higher than the 16% intra-ASEAN share of trade in services and foreign direct investment inflows.<sup>3</sup> The percentages are not high enough to make the community a solid economic 'third force' in Asia. For the ASEAN block, one way of becoming more immune to uncontrollable external forces is to become more dependent on one another — doing more intra-ASEAN trading, investing more in each growth and development, visiting other member countries, listening to one music and watching other country's films and TV shows, not to mention liking and supporting each brands! To investigate the latter, we at the Asia School of Business conducted an exploratory study (including insights by the global social media analytics company SocialBakers) on the brands that ASEAN consumers like most and which they share a passion for. The method we used was to identify the brands that had built up substantial international social media popularity in the ASEAN region, as well as to assess the Top 100 Most Popular / Liked Brand Facebook Pages in the six largest ASEAN's economies: Indonesia (262 million people) Malaysia (30.3), Philippines (100.7), Singapore (5.5), Thailand (67.9), and Vietnam (91.7). In all of these countries, the use of the Internet and Facebook is well established: 60.5% of the 558 million ASEAN-6 consumers are Internet users. Almost all of them — 88% — are also Facebook users, amounting to a total of 296.9 million people utilizing Facebook.<sup>4</sup>

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2. Crismundo, K. M. "ASEAN Seen to Exceed GDP of Big Economies in 2017," 12 January 2017. <http://www.canadianinquirer.net/2017/01/12/asean-seen-to-exceed-gdp-of-big-economies-in-2017/>

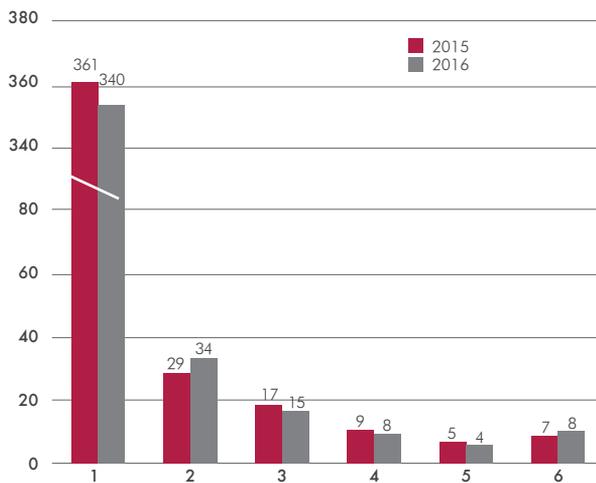
3. Asa-El, A. "Deglobalization is Already in Full Swing," 31 August 2016. <http://www.marketwatch.com/story/deglobalization-is-already-in-full-swing-2016-08-31>

4. Crismundo, K. M. "ASEAN Seen to Exceed GDP of Big Economies in 2017," 12 January 2017. <http://www.canadianinquirer.net/2017/01/12/asean-seen-to-exceed-gdp-of-big-economies-in-2017/>

## Results: Large Diversity but United on the Three F's

Overall, the list of the Top 100 'Likes' across the six countries is crowded with a number of different brands. In 2015, 420 social brands managed to get into one or more of the Top 100 Most Liked Pages for Brands (see Graph 2 below). A year later, the total number of brands was 435; there were 74 to 70 brands, respectively (15% of the total number of different brands), which also acquired a top position presence in more than one market. A large majority of the brands (84%) have a substantial social media reach in only one ASEAN market. Eight international brands qualify as true All-ASEAN Social Brands because they have managed to enter into the Top 100 of all of the six ASEAN economies. Combined, the separate, local fan bases from these ASEAN countries amount to numbers of between 6 – 16 million Likes, equal to a market reach of between 2% (Zalora) and 7% (Samsung). Five brands have an extensive international Facebook reach in five of the six countries. Eight brands have a top-ranked social media reach in four of the ASEAN-markets — 14 in three markets and 28 brands in two markets. Interestingly, the eight brands uniting ASEAN are around a specific set of themes: The Three F's of ASEAN: Food, Fashion and Phones. (Note: The Food category also includes beverages unless otherwise specified.)

GRAPH 2: ASEAN-6 BRANDS (ASEAN-6 LIKES, IN MILLIONS)



**Presence in number of ASEAN-6 markets →**

30 brands with presence in 2 countries, 15 brands with presence in 3 countries, 12 brands with presence in 4 countries, 3 brands with presence in 5 countries and 7 brands with presence in 6 countries.

Source: Data from SocialBakers Statistics: Brands in Malaysia, Singapore, Indonesia, Philippines and Vietnam; please note that we eliminated repeated top rankings from brands with multiple pages for sub-brands or product pages, like Nike Football, Samsung TV.



### Food

The ASEAN region is all about food. There are any number of tasty national dishes, such as Malaysia's Nasi Lemak, Singapore's Chili Crab, the Filipino Abodo, Tom Yum Goong in Thailand, Vietnam's Phở Noodle Soup and Indonesia's cone-shaped rice dish called Tumpeng. In this part of the world, eating and sharing a meal with someone else is an important currency, but that doesn't translate as much in terms of caloric intake — ASEAN's level of 2,000 calories a day is equal to the world's average. For a long time in many Southeast Asian countries rice has, and still does, constitute a large proportion of the daily diet. It is still true that over 40% of calorie intake comes from rice, with the exception of Malaysia and Singapore where calorie intake from rice is lower than 40%.<sup>5</sup> These two countries have been much more influenced in terms of social setting and the changes in cuisine options. The already rich choices of national cuisines were complemented by the entry of new Western Fast-food dining options and they became commercial hits.<sup>6</sup> Among the most liked ASEAN brands on social media in the region are Kentucky Fried Chicken (KFC) and Pizza Hut. Both are Yum! Brands subsidiaries that have long histories in ASEAN: KFC entered the region through Philippines in 1957 and Pizza Hut opened its first restaurants in Singapore in 1979. It is interesting to note is that Fast-food competitor McDonalds made it to the Top 100 popularity charts in four of the six ASEAN countries, all except Indonesia and Vietnam. This category also includes drinks. The biggest player for drinks is the Coca-Cola Company, mostly with their flagship brand Coca-Cola. However, in three countries, Coca-Cola subsidiaries are also in the Top 100. Fizzy drinks are the most popular in the ASEAN community. Coffee and alcoholic drinks are also commonly found among the most liked brands.



Photo Credit: blog.axisrooms.com

5. 'The Importance of Rice.' [http://www.knowledgebank.iri.org/ricemotion/bodydefault.htm#Importance\\_of\\_Rice.htm](http://www.knowledgebank.iri.org/ricemotion/bodydefault.htm#Importance_of_Rice.htm), (accessed 24 May).

6. Tomiyama, A. "Southeast Asia's Burgeoning Restaurant and Coffee Chains," 19 August 2015. <http://asia.nikkei.com/Business/Trends/Southeast-Asia-s-burgeoning-restaurant-and-coffee-chains>



Fashion

ASEAN block members are all about looking good. Despite the lack of four distinct seasons in this tropical part of the world, ASEAN is into Fashion: iconic testimonies are the Fashion shows in Kuala Lumpur Fashion Week (August), Singapore Fashion Week (October), Jakarta Fashion Week (October), Manila Fashion Week (October), Bangkok International Fashion Fair (March and November) and Vietnam International Fashion Week (November), etc. Also simulated by the international recognition and success of Asian fashion designers and models, interest in fashion trends and dressing well are widely shared. In our study, consumers across ASEAN economies seem to share Likes for certain Fashion brands. With that the migration of shopping to online and e-commerce channels in this area has rapidly taken off, much to the disappointment of shopping centers and real estate owners, maintaining high-levels of occupancy in malls has become a challenge. The social media leaders in the fashion field are Zalora, Lazada and Adidas. Zalora is one of Asia’s largest multi-fashion brands online platforms. It targets the region’s style enthusiasts by offering the latest high-street looks through an extensive collection of global and local fashion and beauty brands made available on one go-to platform. The founder of Zalora was the German Internet incubator Rocket Internet, headquartered in Berlin, who first launched the brand in Vietnam in 2012 and soon rolled out to the other ASEAN markets. Zalora’s six million Likes provide them with a direct reach of earned media attention of 2.5% within the ASEAN region. The general e-commerce platform Lazada, the strong regional brand based in Singapore and also founded by Rocket Internet in 2012, has double the fan



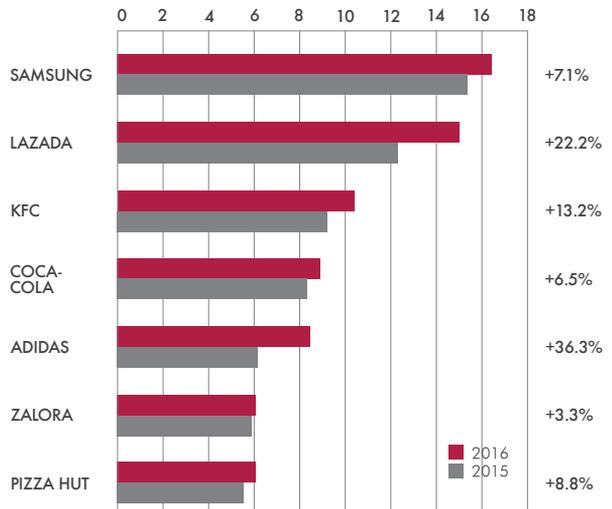
Photo Credit: www.zalora.com



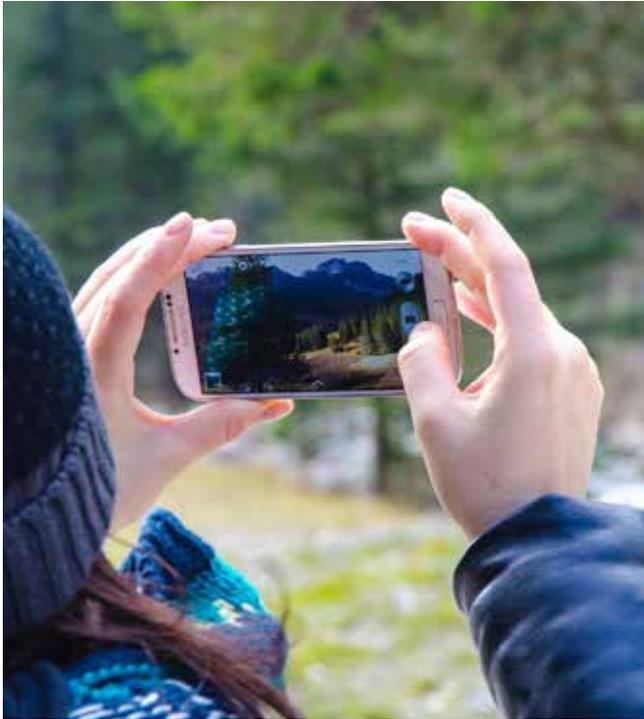
Phones

In the ASEAN countries, it’s about staying connected. Internet penetration in the region increases rapidly year after year, but still varies among the six economies: from Indonesia with (50.4%), Philippines (52%), Vietnam (52%), Thailand (60%) and Malaysia (67.7%), to the highest in Singapore (81.2%). The mobile phone usage is higher across the board and people are making the conversion from Feature to Smart phone at an accelerated pace. The brands that people share a common interest in are Samsung and Huawei. In particular, Samsung’s 16.2 million Likes in ASEAN gives them a 6.7% earned media audience. Samsung is sold at an attainable price point for ASEAN’s rising middle class. That might explain why Apple, a pricier phone brand beloved in developed countries, is not on this list.

GRAPH 3: ALL-ASEAN BRANDS (ASEAN-6 LIKES IN MILLIONS)



Source: SocialBakers



**FROM A METHOD POINT-OF-VIEW, FURTHER STUDY WILL EXPAND ON A WIDER SET OF PERFORMANCE AND SOCIAL MEDIA METRICS OF ALL-ASEAN BRANDS.**

Questions related to these findings might include: Why are most top brands in the ALL-ASEAN block originally from outside of the region? We could speculate that global brands have larger amounts of marketing resources and are accustomed to approach the ASEAN as a region instead of on a country-by-country basis. Second, and more fundamentally, why would consumers decide to like or follow brands on social media? The engagement can be based on myriad motivations, but roughly the two major factors are that consumers want to stay updated on news — new products — from the brands they liked on Facebook; and / or they are interested in marketing promotions and are looking for good deals. With regard to the Three F's<sup>7</sup> of ASEAN: consumers look for promotions or deals from the food brands; they want information on styles and trends from the Fashion brands; and, in terms of Phones, their motivations are a more equal mix of both — information on new models, as well as good deals.

#### What's Next: In Search of Homegrown ASEAN Brands

With all due respect, the future of ASEAN's integration and economies is not the 10 elderly statesmen standing arm-in-arm on a stage smiling for a ceremonial photo shoot, but by the behaviors and aspirations of its 135 million Millennials<sup>7</sup> — the generation of people aged 18 to 29 years old, many of whom make up the daughters and sons of an increasingly digitally connected and rising middle class.<sup>8,9</sup> The question about which brands they like and appreciate from other ASEAN countries is one that we will address in the future. From a method point-of-view, further study will expand on a wider set of performance and social media metrics of All-ASEAN brands. The method we used for this exploratory study is the number of page Likes (and followers), a measure that is probably one of the simplest metrics but one that is, by far, not complete.

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9. Barton, C., Koslow, L. and Beauchamp, C. "How Millennials Are Changing the Face of Marketing Forever," 14 January 2015. [https://www.bcgperspectives.com/content/articles/marketing\\_center\\_consumer\\_customer\\_insight\\_how\\_millennials\\_changing\\_marketing\\_forever/](https://www.bcgperspectives.com/content/articles/marketing_center_consumer_customer_insight_how_millennials_changing_marketing_forever/)

# MALAYSIA

**OFFICIAL NAME**  
Malaysia

**GDP**  
US\$296.3 billion

**LANGUAGE**  
Bahasa Malaysia

**CAPITAL CITY**  
Kuala Lumpur

**INCOME GROUP**  
Upper Middle  
Income

**PRIMARY  
RELIGION**  
Islam

**INHABITANTS**  
30.3 million

**LAND AREA**  
328,550 sq.-km

PERCENTAGE, %



**12.7**

GDP of ASEAN-6



**0.6**

Poverty



**60**

Facebook Users

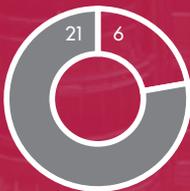


**94.6**

Literacy

THE THREE F'S, TOTAL BRANDS

□ Homegrown □ International



**27**

Food



**27**

Fashion



**17**

Phone



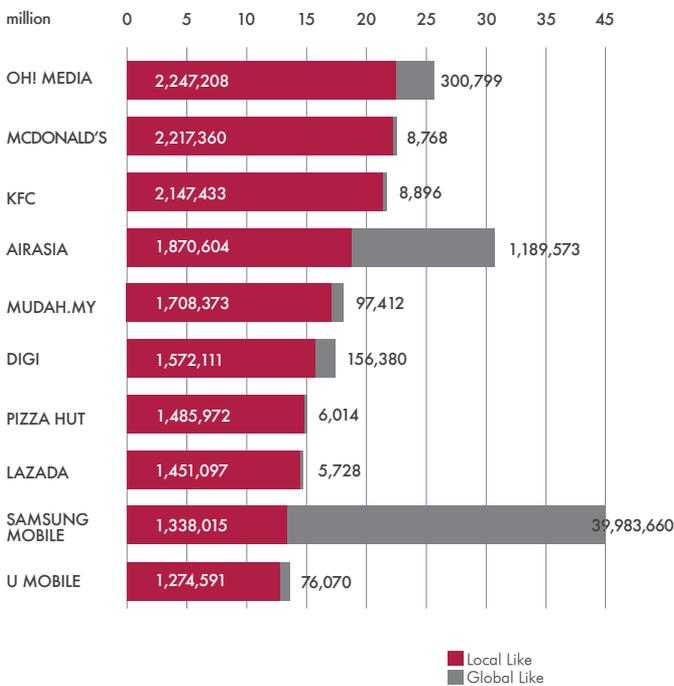
**8**

Others

It's All about Food, Fashion, Phones... plus Fuel and Fasih Ekonomi

'Malaysia Truly Asia' is the country's long-running international tourism campaign; its 15+ years of consistent messaging is well embedded into travelers' minds. The nation has become known for its multi-ethnic and multi-cultural makeup and hospitality. Many consumers abroad know now how Malaysia's population of 30 million consists of several ethnicities representing Asia's diversity: Malays, as well as descendants of Chinese, Indian, and Indigenous groups. This is how the world knows and loves Malaysia as a brand. But, to reverse the question, which brands from the world do Malaysians love? In Malaysia, the use of the Internet and Facebook is well established: 21 of the 30 million Malaysian consumers (67.7%) are Internet users. Most of them (61%) are also Facebook users; that amounts to a total of 19 million Facebook users.<sup>10</sup>

GRAPH 4: TOP 10 BRANDS ON MALYSIAN SOCIAL



Note: Number (in millions) of local Facebook Likes and the portion of those Likes of all the global Likes

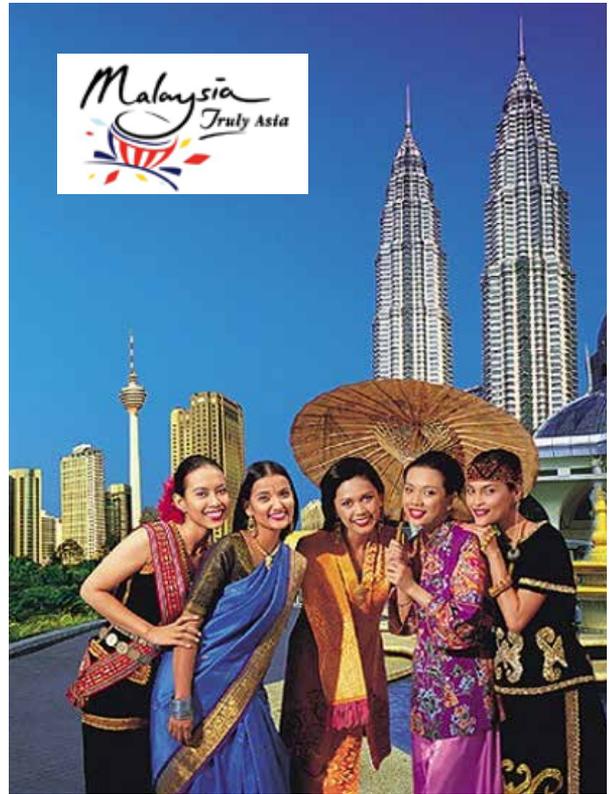


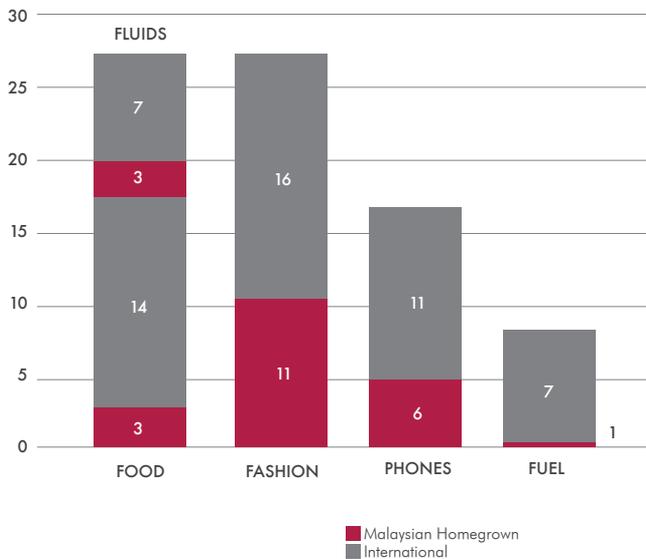
Photo credit: Tourism Malaysia

10. "Internet World Stats, Usage and Population Statistics" (17 May 2017). Accessed from <http://www.internetworldstats.com/asia.htm>

Results: Food, Fashion, Phone and.... Fuel plus *Fasih Ekonomi*

Malaysians are open to the world. Of the 100 top social brands, 35 are Malaysian. The remaining brands are from 23 other countries; four of them are from ASEAN partners, Singapore three and Thailand one; 17 are from the rest of Asia, of which nine are from Japan and four are from South Korea. There are 15 from the US and seven from Germany. The top 10 brands have over 17 million Likes coming from Malaysia. To qualify for the list of the Top 100 Leading Social Brands, a brand needs to get over 388,000 local Likes. As we reported in the previously, the themes of the brands commonly shared in ASEAN are Food, Fashion and Phones. Almost 71% of the top brands fall into the ASEAN Three F's' categories; yet, on top of these, Malaysians prefer their own set of unique brands in each category. Furthermore, Malaysia has two additional brand themes: brands related to Fuel and *Fasih Ekonomi* — being frugal, getting good deals and buying value consciously.

GRAPH 5: CATEGORIES ON MALAYSIAN SOCIAL



Food

27 Brands, 22% Homegrown

To begin with, the large Western Fast-food brands enjoy an immense popularity with almost seven million Local Page Likes: Pizza Hut, KFC, McDonalds and Burger King. They are in close competition with five of Nestlé's largest international brands: Milo, KitKat, Nescafé, Maggi and Nestlé Drumstick. About one-fourth of the food brands are originally Malaysian, such as the instant noodles Mi Sedaap and the energy drinks 100Plus and Revive. Local food retail concepts, like Burger Bakar Abang Burn, Big Apple Donuts & Coffee and Sushi King, have also gained a substantive social following.

FIGURE 2: THE EVER POPULAR WESTERN FAST-FOOD



Photo credit: twitter.com/BurgerKing

Fashion Brands

## 27 Brands, 41% Homegrown

There are two e-commerce platforms — Zalora and Lazada — that are popular in all six-major ASEAN economies. In Malaysia, there are 25 additional fashion-related brands that are popular and followed. Of those, 11 of the 27 Fashion brands are homegrown; a large portion of which belong to a category very special to Malaysia in ASEAN — the hijab and Muslima Wear brands and items related to Anugerah, the Islamic lifestyle. The nine headscarf fashion brands most active on Facebook are Fareeda (one million Likes), Aidijuma (one million), Radiusite (630,000), Zawara (590,000), SweetMuslimah.com (510,000), Galeri Ariani (510,000), Alhumaira Contemporary (510,000) and Qaira Hijab (480,000). Many of these brands have adopted a multi-channel strategy to serve their customers and, increasingly, Malaysia’s Hijabistas shop for their latest look online. Other Malaysian personal appearance-related brands are Sally Fashion and Padini Holdings (shoe wear), QQ Baby Shop (online shop for baby clothes) and the online fashion portal MySale 小三魔法棒(小三美日). The remaining fashion brands in this category are Sports brands (Adidas, Nike, Converse and Puma), Fast-Fashion (H&M, UNIQLO) and Luxury (Louis Vuitton, Gucci and Burberry), as well as accessories brands (Ray-Ban and Ice-Watch).

FIGURE 3: ISLAMIC FASHION IS AN IMPORTANT FACTOR



Photo credit: www.facebook.com/FareedaOfficial

Phone

## 17 Brands, 35% Homegrown

The third All-ASEAN category is Phones and Korea’s Samsung are the two phone brands seen everywhere in ASEAN. Malaysia has 15 other ‘Phone’ and Consumer electronics-related brands competing for online consumer engagement with Sony, Nikon, BlackBerry, HTC, ASUS and OPPO Mobile. The six Homegrown trademarks in this consumer domain are Telecom providers Digi, U Mobile, Maxis, Hotlink and the phone websites iPmartand XPAX.

FIGURE 4: HOMEGROWN TELECOMMUNICATIONS BRAND



Photo credit: www.facebook.com/pg/digi

Fuel

## 8 Brands, 13% Homegrown

Until the 1990s, Malaysia, heavily dependent on oil, began to diversify its economy in order to lessen the exposure to uncertain oil prices. Although the oil dependency has successfully shrunk, many fuel-related brands remain in the hearts of many Malaysian people; there is a large proportion of cars in the top 100 brands: Honda, Toyota, Nissan (all from Japan), KIA (Korea), BMW and Volkswagen (Germany) and Peugeot (France). There is room on this list, as one would expect, for the national pride brand: PETRONAS, the country’s oil company.

FIGURE 5: ONE OF MANY FUEL-RELATED BRANDS



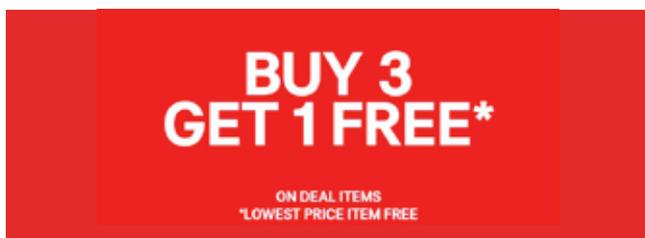
Photo credit: [www.facebook.com/petronas1](http://www.facebook.com/petronas1)

### Fasih Ekonomi

## 16 Brands, 75% Homegrown

One of Malaysia's national sports is 'looking for a good bargain' and the best trophy that can be won is getting a great Tawaran Istimewa (special offer), something that really shows how much can be saved. Across the four previous themes of brands, Malaysians really engage with brands that connect to their Fasih Ekonomi (fluency in economics). Thanks to certain brands, frugal purchase decisions are made by comparing prices, products and offers, all with the objective to save money — not necessarily the lowest price but maximizing the total value, including the value of saving their time, of shopping and preferring direct delivery to the home, office or wherever the consumer is. Thirteen of the 18 brands are online shops. There are two online marketplaces, or deal sites, making it top Malaysia's top social media brands: Mudah.my and Groupon. Furthermore, in addition to two of the All-ASEAN brands, Zalora and Lazada, there are Malaysia-specific online shops who sell Phones and Fashion, making it easier for frugal Malaysians to compare prices: iPmart is Malaysia's online shop for phones, tables and other consumer electronics gadgets. GEMPAK STARZ is an online shop for games. Additionally, numerous fashion brands have their online e-commerce sites, many of them for hijab brands (FAREEDA, Aidijuma, Radiusite, Galeri Ariana, Sweet Muslimah and Qaira).

FIGURE 5: A BETTER DEAL



## Malaysian Brands with ASEAN Popularity

Finally, worth noting is that three of Malaysian brands have gained top international popularity and are demonstrating competitiveness abroad. By winning the hearts and minds of their ASEAN neighbors they seem to be on their way to gain the ALL-ASEAN brand status. The three leading brands are AirAsia, Asia's leading low-cost carrier, and Malaysia's top banking institution, CIMB. In short, to the question posed earlier, the diversity of brands Malaysians engage in online is quite varied — more than 65% of the brands originate abroad (from as many as 23 other countries). Malaysia has a unique composition of the All-ASEAN brand theme categories of Food, Fashion and Phones, in addition to having two other brand categories: Fuel-related brands (mainly cars) and Fasih Ekonomi.



Photo credit: [www.instagram.com/tonyfernandes](http://www.instagram.com/tonyfernandes)

# SINGAPORE

## OFFICIAL NAME

Republic of Singapore

## GDP

US\$292.7 billion

## LANGUAGE

English

## CAPITAL CITY

Singapore

## INCOME GROUP

High income

## PRIMARY RELIGION

Buddhism

## INHABITANTS

5.5 million

## LAND AREA

709 sq.-km.

PERCENTAGE, %



**12.6**

GDP of ASEAN-6



**0**

Poverty



**70.9**

Facebook Users

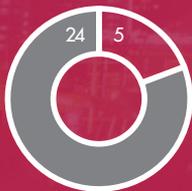


**96.7**

Literacy

THE THREE F'S, TOTAL BRANDS

Homegrown International



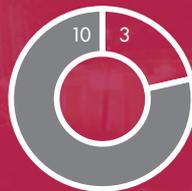
**29**

Food



**25**

Fashion



**13**

Phone



**11**

Others

Singapore's Leading Social Brands; Also Flying and Finance

Numerous international rankings rate Singapore favorably in terms of the world's easiest places for Doing Business (World Bank), the best country for Intellectual Property Protection (World Bank), among the first on the Corruption Perceptions Index (Transparency International, or TI), the top in Math and Science Education rankings (Organisation for Economic Co-operation and Development, or OECD), ranked the the third richest in terms of GDP per Capita (International Monetary Fund, or IMF), in addition to being number one as the city with the highest cost-of-living<sup>11</sup> (*The Economist*). Overall, being marketed as 'Future-Ready Singapore' to the international business community and as 'YourSingapore' to tourists, the standing of the Lion City as a country brand has also climbed the ladder. FutureBrand's Country Brand Ranking places Singapore at number 14, implying a solid second position in Asia after Japan.

FIGURE 6: ATTRACTING TOURISM



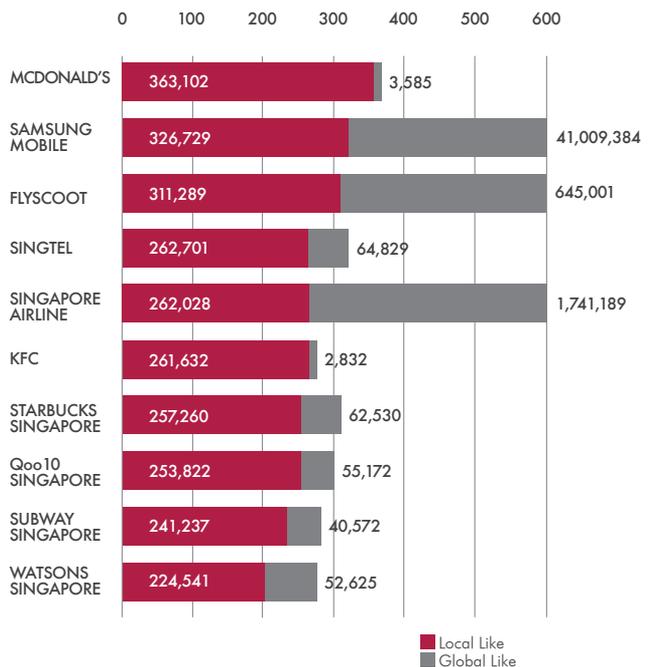
As a virtuous reinforcing cycle, the top-ranked brand image of the Lion City with its futuristic Gardens-by-the-Bay Bio-Domes and integrated resort Marina Bay drew 15,231,469 international visitors in 2016 — double the amount of visitors from a decade ago. On the front of foreign direct investments, the growth has been a tremendous 270%, from US\$193 billion worth of assets invested by foreign entities in 2004 to US\$717 billion in 2014.

This study explores how Singapore's high-performing country brand transfers into the popularity of Homegrown brands, both at home and abroad. Specifically, we want to know which Singapore brands are liked by the Singaporeans and by consumers from the other five largest ASEAN economies, as well as which ASEAN and global brands are liked by Singaporean consumers. In Singapore, the use of the Internet and Facebook is well established: 4.7 of the 5.8 million Singapore consumers (81.2%) are Internet users. More than two out three persons (70.9%) are also Facebook users, amounting to 4.1 million Facebook users.<sup>12</sup>



Photo credit: www.straitstimes.com/tech/smartphones/millennials-in-singapore-spend-almost-34-hours-a-day-on-their-mobile-phones-study

GRAPH 6: TOP 10 BRANDS ON SINGAPOREAN SOCIAL



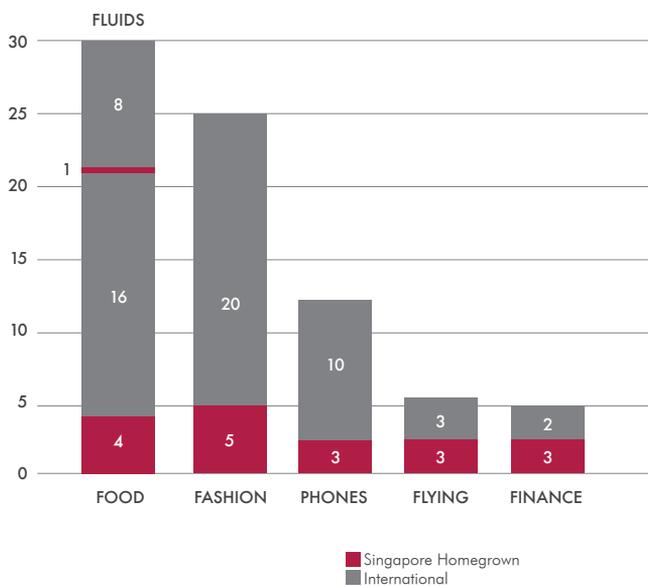
Note: number (x1000) of local Facebook ILikes and the percentage of those Likes of all the global Likes

11. "Measuring the Cost of Living Worldwide" (March 2017). Accessed from <http://www.economist.com/blogs/graphicdetail/2017/03/daily-chart-13>  
 12. "Internet World Stats, Usage and Population Statistics," 17 May 2017. <http://www.internetworldstats.com/asia.htm>

Results: Fashion, Food and Phones, plus Flying and Finance

Of the Top 100 brands in 2016, 30 were founded in Singapore. The remaining brands are from 23 other countries; three of them are from the ASEAN region; 17 are from the rest of Asia, of which eight are from Japan and three from South Korea; there are also 22 from the US and 25 from Europe. Four brands hold a dual passport: Lazada, Zalora (German / Singaporean), Tiger Beer (Singapore / Netherlands) and Metro (Singapore / Indonesia). To qualify for the Top 100 leading 100 leading social brands, a brand needs to get over 63,435 local Likes; this minimum threshold to enter the Top 100 was 19% higher than the year before. As we reported in all-ASEAN segment, the themes of the brands commonly shared in ASEAN are Food, Fashion and Phones. Of the Top 100 brands, 66 fall under these All-ASEAN categories of Food, Fashion and Phones. Furthermore, Singapore has two additional brand themes: brands related to Flying and Finance.

GRAPH 4.4: CATEGORIES ON SINGAPOREAN SOCIAL



Food

30 Brands, 20% Homegrown

As for all other ASEAN consumers, including Singaporeans, the Western Fast-food brands receive a lot of online engagement. Within the Top 10 brands, McDonald’s, KFC and Subway all take prominent positions. Also on the list are other Fast-food chains such as Pizza Hut (Ranked 19th), Burger King (26) and Popeye’s Louisiana Kitchen (69). Coffee chains on this list are direct competitor Starbucks (7) and The Coffee Bean (38).

Among the food brands, only four are from Singapore, supermarket NTUC FairPrice, sea food restaurants Long John Silver’s and The Manhattan FISH MARKET, and online supermarket RedMart. Eight of these brands are from the United States, primarily the previously mentioned big Fast-food chains. A striking element is that Singapore seems to have a strong preference for chocolate-related products. With brands like Ferrero Rocher, Kinder Bueno and Nutella (all from Italy), KitKat (UK) and MILO (Australia) and Magnum from Unilever (UK), stand out compared to the other ASEAN countries. In the drinks department, Singaporeans prefer coffee and beer to fizzy drinks, which is not in line with the rest of the ASEAN region. On the Top 100 list are four coffee brands and three beer brands.

FIGURE 8: POPULAR FOOD BRAND FROM ABROAD



Photo credit: www.facebook.com/MFMSingapore

## Fashion

## 23 Brands, 22% Homegrown

Two annual fashion weeks (Singapore Fashion Week and the Digital Fashion Week), in addition to multiple other fashion-related events, show that being fashionable in Singapore is a prevalent theme among many consumers. Twenty-three of the 100 most liked brands are in the fashion category. Luxury goods rank high among top social Fashion brands in Singapore; eight of the 23 are counted as premium brands: Burberry, Chanel, Gucci, Louis Vuitton, Tiffany & Co, Cartier, Rolex and local jeweler chain Lee Hwa Jewelry, reflecting the city's high buying power. Online shopping is also an important part of the society. With a steady 2% unemployment rate, and the longest average working hours per year (2,366 hours<sup>13</sup>), it is easy to imagine that there is less time to shop, making online shopping important. Only five of the 23 fashion brands are based in Singapore. In order of popularity, online fashion sites are Zalora, Lazada, Reebonz, Lee Hwa Jewelry and the Singapore-Malaysian Saturday Club. Popular brands from the US are Forever 21, Nike and Tiffany & Co. Europe also has a great presence in Singapore regarding fashion brands. For instance, Adidas, Zalora, Puma and Lazada (all from Germany) and luxury brands such as Chanel, Louis Vuitton and Cartier (France). However, less expensive worldwide fashion brands are also present like Mango (Spain) and H&M (Sweden). Asian fashion brands are G2000 (Hong Kong), F3 (India), UNIQLO (Japan) and Fox Fashion (Israel).

FIGURE 9: SINGAPORIANS ARE FASHION CONSCIOUS



## Phone

## 13 Brands, 23% Homegrown

Once again, the third ALL-ASEAN:F, Phones in Singapore is represented by the strong presence of Singaporean service providers Singtel, StarHub and M1 and Singaporeans apparently like to like the Facebook Pages of their Homegrown networks. The remaining 11 phone brands are hardware brands from abroad but mostly with Asian countries of origin: Samsung (Koreas) has three brands, Courts (UK), Canon (Japan), HTC (Taiwan), Best Denki (Japan), Mi Global, or Xiaomi (China), Razer (US) and Nikon (Japan). The most notably absent on the Like list is Apple but there are two Apple-related Fan pages present, one for the App Store and another for iTunes.

FIGURE 10: ONE OF SINGAPORE'S PHONE SERVICE PROVIDERS

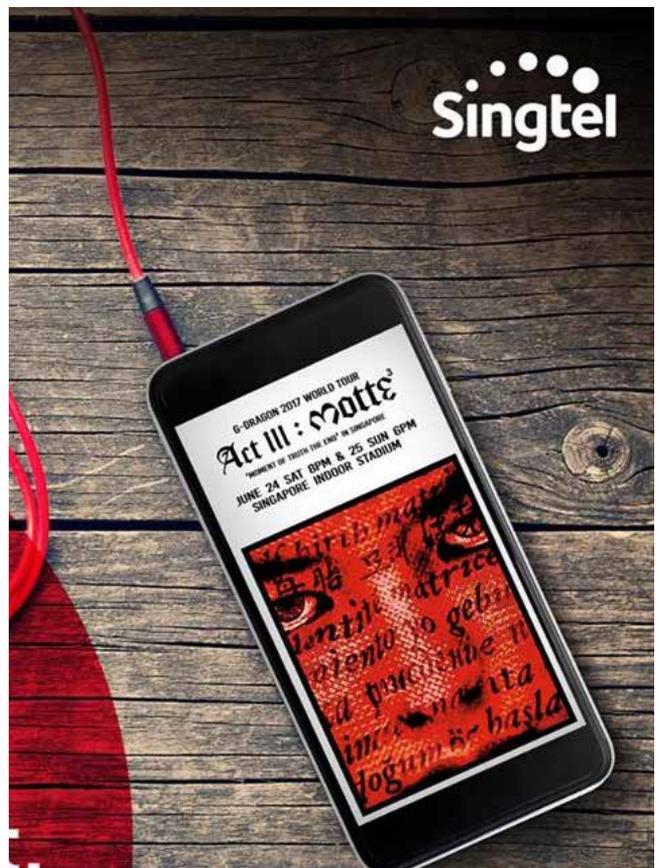


Photo credit: www.facebook.com/singtel

13. "Labour Market Report 2016," March 2017. <http://stats.mom.gov.sg/Pages/Labour-Market-Report-4Q-2016.aspx>

## Flying

## 6 Brands, 50% Homegrown

The first 'F' particular to Singapore is Flying. Singapore has always been a relatively big player in the airline industry. Once challenged by Bangkok's main airport, Changi International Airport had over 58.7 million in passenger movement<sup>14</sup> — about three million more than its Thai rival.<sup>15</sup> One of the clarifications for this high level of travel is the fact that Singapore is the heart of the financial sector, business and multinational enterprises (MNE). This, of course, brings a large amount of international flight traffic. Perhaps related to this high level of air travel activity is the fact that three of the six brands in the Flying category are from Singapore. Surprisingly, the low-cost, long-haul airline FlyScoot, a subsidiary of the more globally recognized Singapore Airlines, ranks third on the list with 311,289 Local Likes. Interestingly, almost 90% of total Likes come from people living outside of the city-state. Its parent company Singapore Airlines ranked fifth and follows closely. The other Singapore Airlines subsidiary Tigerair, the low-cost short-haul is ranked 17th. These three air carriers are joined by Malaysia's AirAsia (58) with two brands on the list, as well as Australia's JetStar (45).

FIGURE 11: PRIDE IN ITS HOMETOWN AIRLINES



Photo credit: www.facebook.com/singaporeair

## Finance

## 5 Brands, 60% Homegrown

The second country specific 'F' is Finance. As mentioned previously, Singapore is ranked very high on the scale of GDP per capita. With a GDP a little over US\$87,855 per capita, Singapore is the richest ASEAN member country. According to the IMF, the Lion City is the third highest in the world (compared to the US's GDP per capita of US\$57,436).<sup>16</sup> Could this be an explanation for why Singapore has four financial institutions, in addition to one credit card company, in the Top 100? OCBC Bank Singapore and DBS Bank are among the most popular financial institutions, followed by POSB Bank Singapore (a DBS subsidiary) and Citibank. Citibank is one of the two foreign financial institutions, in addition to credit card company MasterCard (both from the US) that complete the Singapore's Finance-5 group.

FIGURE 12: THE FINANCIAL DISTRICT OF THE LION CITY



### Singaporean Brands with ASEAN Popularity

Singapore's top country brand ranking does not (yet) transfer into immediate popularity of its brands among other ASEAN consumers. Among ASEAN consumers, only one Singaporean brand has a top listing. That brand is not Singapore Airlines because Flying is not a prominent category in any of the other ASEAN countries, nor is it a Singapore bank. Instead, the top brand is Tiger Beer, which has 109,739 Singapore-based Likes and a total number of global Likes at 2,019,813. The international spillover to other countries also occurs with its immediate ASEAN neighbors, where two countries have a high Tiger Liking: Vietnam 473,748 (23.5%) and Thailand 250,352 (12.4%). In total, more than half of the global Likes are from other ASEAN countries.

14. "Air Traffic Statistics," 25 April 2017. <http://www.changiairport.com/corporate/about-us/traffic-statistics.html>15. Wikipedia. "Suvarnabhumi Airport," 30 May 2017. [https://en.wikipedia.org/wiki/Suvarnabhumi\\_Airport#Passenger](https://en.wikipedia.org/wiki/Suvarnabhumi_Airport#Passenger)16. Wikipedia. "List of Countries by GDP (PPP) Per Capita," 27 May 2017. Accessed from [https://en.wikipedia.org/wiki/List\\_of\\_countries\\_by\\_GDP\\_\(PPP\)\\_per\\_capita](https://en.wikipedia.org/wiki/List_of_countries_by_GDP_(PPP)_per_capita)

# INDONESIA

**OFFICIAL NAME**  
Republic of Indonesia

**GDP**  
USD861.9 billion

**LANGUAGE**  
Bahasa Indonesia

**CAPITAL CITY**  
Jakarta

**INCOME GROUP**  
Lower Middle  
Income

**PRIMARY RELIGION**  
Islam

**INHABITANTS**  
262 million

**LAND AREA**  
1,811,580 sq.-km.

PERCENTAGE, %



**37**

GDP of ASEAN-6



**11.3**

Poverty



**66.6**

Facebook Users

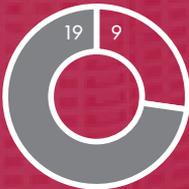


**95.4**

Literacy

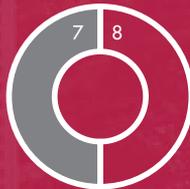
THE THREE F'S, TOTAL BRANDS

Homegrown International



**28**

Food



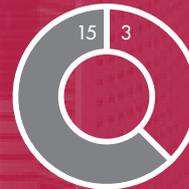
**15**

Fashion



**21**

Phone



**18**

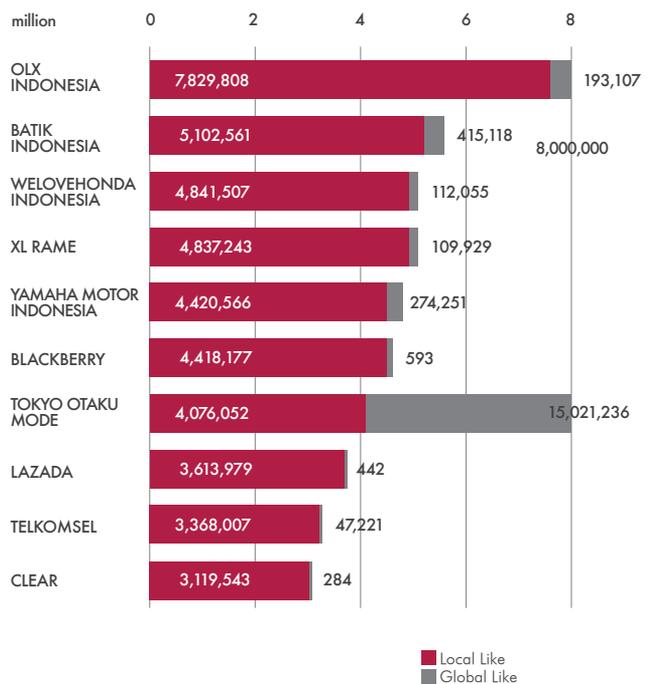
Others

100 Wonderful and Remarkable Social Brands in Indonesia, plus Physique and Fast Bikes

The vast size and rapid rate of change make Indonesia a fascinating country to study. The last time we counted, Indonesia had 263,203,942<sup>17</sup> inhabitants. This population count not only makes ‘The Emerald of the Equator’ the largest nation in ASEAN but also with more than an 80% Muslim population, it makes Indonesia the world’s biggest Muslim country. ‘The Archipelago,’ or the ‘Country of A Thousand Islands’ consists of 17,508 islands, with approximately 300 distinct native ethnic groups speaking 742 different languages and dialects. With its incredible cultural versatility, and natural biodiversity, Indonesia’s immense number of islands with white sandy beaches and its pleasant topical climate make for a holiday destination for many tourists. Currently, about 11.5 million tourists visit Indonesia, up by 3.5 million visitors in five years’ time.<sup>18,19</sup> Yet, the country has set ambitious targets and aims in the coming years to double that number to 20 million visitors. To get there, the nation had to improve its rank of 140 on the World Economic Forum’s (WEF) Travel and Tourism Competitiveness Index in 2011. After the Indonesian Ministry of Tourism launched the new ‘Wonderful Indonesia’ campaign to ignite the curiosity of prospective tourists, the nation successfully jumped the list to the 42nd position in just six years.<sup>20</sup> Not only did the external country image perceptions improve dramatically but it also changed internally. Indonesia’s booming middle-class and affluent consumers or (MACs) is expected to double from 74 to 141 million by 2020,<sup>21</sup> making the country attractive to many more foreign investors. Given the incredible size, diversity and rate of change, there is much still to be explored in Indonesia. This study, therefore, seeks to examine one more element of today’s ising and well-connected Indonesian MACs by analyzing the county’s top social brands.

In Indonesia, the use of the Internet and Facebook is rapidly growing and now 88 of the 262 million Indonesian consumers (34%) are Facebook subscribers.<sup>22</sup>

GRAPH 7: TOP 10 BRANDS ON INDONESIAN SOCIAL



Note: number (in millions) of local Facebook Likes and the percentage of those Likes of all the global Likes

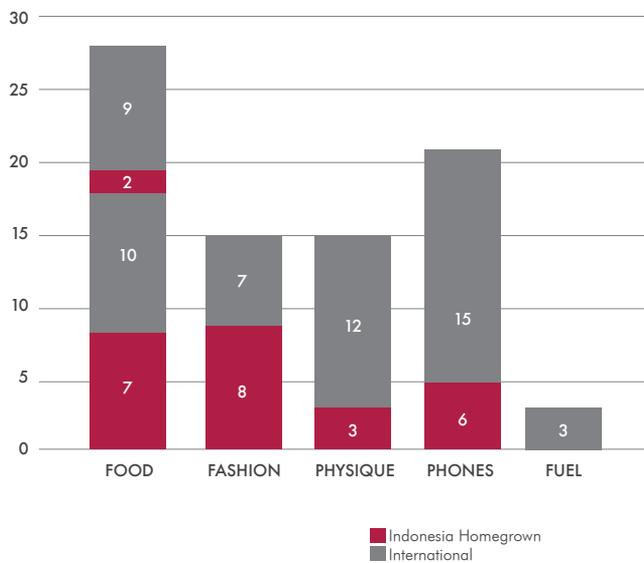


17. Worldometers.info. "Indonesia Population," <http://www.worldometers.info/world-population/indonesia-population/> (accessed 25 May 2017).  
 18. Tradingeconomics.com. Indonesia Tourist Arrivals, <http://www.tradingeconomics.com/indonesia/tourist-arrivals> (accessed 25 May 2017).  
 19. The World Bank. "International Tourism, Number of Arrivals Indonesia." <http://data.worldbank.org/indicator/ST.INT.ARVI?locations=ID> (accessed 25 May 2017).  
 20. Crotti, R. and Misrahi, T. "The Travel & Tourism Competitiveness Report 2017." [http://www3.weforum.org/docs/WEF\\_TTCR\\_2017\\_web\\_0401.pdf](http://www3.weforum.org/docs/WEF_TTCR_2017_web_0401.pdf) (accessed 1 April 2017).  
 21. Rastogi, V., Tamboto, E. and Tong, D. "Indonesia's Rising Middle-Class and Affluent Consumers," 5 March 2013. [https://www.bcgperspectives.com/content/articles/center\\_consumer\\_customer\\_insight\\_consumer\\_products\\_indonesias\\_rising\\_middle\\_class\\_affluent\\_consumers/](https://www.bcgperspectives.com/content/articles/center_consumer_customer_insight_consumer_products_indonesias_rising_middle_class_affluent_consumers/)  
 22. "Internet World Stats, Usage and Population Statistics." <http://www.internetworldstats.com/asia.htm> (accessed 17 May 2017).

Results: Food, Fashion, Phones and....  
Physique and Fast Bikes.

Of the 100 top brands, 33 are Indonesian. The remaining brands are from 27 other countries; eight of them are from the ASEAN region; 19 are from the rest of Asia, of which five are from Japan and five from China; 17 come from the US; five from France and two from Germany. The top 10 brands have over 45.6 million Likes coming from Indonesia. To qualify for the list of 100 Leading Social Brands, a brand needs to get over 1,054,116 Local Likes. As previously mentioned, the themes of the brands commonly shared in ASEAN are Food, Fashion and Phones. Sixty-four of the top brands fall into the ASEAN F categories yet, Indonesians prefer their own unique brands for each category. Furthermore, Indonesia has two additional brand themes: Motorbikes or Fast Bikes (with three brands) and Physique (with 15 brands).

GRAPH 8: CATEGORIES ON INDONESIAN SOCIAL



Food

27 Brands, 30% Homegrown

In Indonesia, as in every ASEAN country, Food is a serious brand category with which people engage online. Seventeen of the Top 100 brands are related to food. Different from Singapore and Malaysia, not many Western Fast-food chains make it to the Top 100 in Indonesia. Exceptions to this are KFC, Pizza Hut and California Fried Chicken (CFC) — not even McDonald’s is on the list. The country’s own brands dominate the food category: seven of the 17 are from Indonesia, of which two are food retailers: Indomaret and Alfamart. Both operate convenience format supermarkets and their network spans over the entire Archipelago. They have successfully replaced the traditional warung (mom and pop stores) by offering a larger assortment of inventory, including food. The other five Homegrown food brands include: Indomie’s instant noodles, Tango wafer cookies, soy sauce manufacturers Kecap Bango and Royco Masak Apa Hari Ini, as well as a product for babies by Kalbe Nutritionals. The other 10 brands on the list are primarily from Europe with transmart / supermarket chain Carrefour (originally from France but sold to CT Corp in 2012), Cornetto (Italy), Knorr (Germany), Magnum (Belgium), Dapur Umami (Japan), Enervon-C (Philippines) and Pizza Hut, CFC and KFC (US). Besides their love for food, Indonesians have significant online engagement with beverage brands. Coca Cola (US), beer by Bir Bintang (Indonesia), mineral water brand Sehat AQUA (France) and non-carbonated energy drinks by Red Bull and Krating Daeng (Austria / Thailand, respectively) are among their favorites. Beer maker Guinness (Ireland), ice tea brand Freshtea (US) and Big Cola (Peru) are also popular. Of these 11 brands, only Bir Bintang and Chocolatos (an instant chocolate drink) are from Indonesia.

FIGURE 13: A LOCAL INDONESIAN BEER BRAND



Photo credit: www.facebook.com/BirBintang

Fashion

## 15 Brands, 53% Homegrown

Fashion, the second ALL-ASEAN category, also has a presence in Indonesia. With three fashion-related brands in the top 10, the category plays an important role. Batik Indonesia ranks second in the Top 100 brands Liked by Indonesians. Batik, Indonesia’s traditional clothes made from painted material and including patterns full of symbolism, is worn primarily by men for formal events. Tokyo Otaku Mode (Japan) and the online fashion brand Lazada (Germany / Singapore) are in seventh and eighth place, respectively. Out of the 15 brands, eight of them are of Indonesian origin. Due to the fact that Indonesia is primarily an Islamic country, there are two Muslim-wear related brands in the Top 100: Moshaiet, a chain of boutiques ranks 36th and Pusat Gamis Terbaru, the distributor and agent of Muslim clothing, ranks 100. Additionally, for summer holiday wear, Surfer-Girl, a surf-wear brand, ranks 11 on the Like list. Since the brand was born in 1988, in a small room close to the beach, on the surfer-paradise of Bali, it has developed a full line of clothing. There are four other Homegrown brands: online fashion brands Sale Stock Indonesia (19) and CK Store Indonesia (75), as well as Lollita Shoes Shop (34) and BRODO Footwear (95). Germany’s Zalora (72) is another important online fashion brand and there are two sport fashion brands, Adidas (Germany, 70) and Nike (US, 29). Clozette Indonesia (21) is the Indonesian edition of Singapore-headquartered Clozette, a digital ‘ecosystem where content, community and commerce converge to enable fashion brands, retailers and designers to engage with stylish, savvy and connected audiences on an innovative platform.’

FIGURE 14: AN ABUNDANCE OF LOCAL COLOR AND FESTIVITY



Photo credit: www.zalora.co.id

Phone

## 21 Brands, 29% Homegrown

As in all ASEAN countries, staying connected is of the utmost importance. And as a result, both phones and Telecom network services contribute greatly to people’s everyday lives. There has been a huge increase in demand for mobile phones in Indonesia, where Indonesia had 124.3 million mobile phone users in 2013 and is projected to have 193.4 million (a 56% increase) by 2019. According to 2012 figures from the Indonesian government, the country should have network coverage of 94%. With 21 phone-related brands in the Top 100, Indonesia has one of the highest likeability for phones among the ASEAN countries. Out of the 21 brands, six are of Indonesian origin, all of which are service providers. Indonesians tend to rely on their local Telecom networks rather than those of international players. The most popular Indonesian provider is XL, followed by Telkomsel, Smartfren, IM3 Ooredoo and Telkomsel’s pre-paid subsidiaries Kartu As and simpATI. Indonesia-born XL, is the most popular network, is now owned by Malaysian telecommunications conglomerate Axiata. The rest of the brands are mostly hand phone brands; three of them are from China — OPPO Mobile, Huawei and Lenovo, while HTC comes from Taiwan. South Korea is also represented with Samsung and LG, as is North America, with Blackberry from Canada and the Microsoft Lumia from the US. Most popular is with the local fans is Blackberry with 4,418,177 Likes, compared to HTC, which has the smallest fan base with only 1,100,065 local Likes.

FIGURE 15: THE EVER IMPORTANT PHONE CATEGORY



Photo credit: www.facebook.com/pg/telkomsel

## Physique

## 15 Brands, 20% Homegrown

With Indonesia's rapidly emerging middle class, the demand for beauty and personal care products and brands continues to increase, especially with Halal products (products that are permissible in traditional Islamic law, frequently applied to food and beverage items). In fact, from 2018 onward, toiletries should be labelled Halal if they qualify. In the Top 100 of social brands, personal care category is dominated by European countries of origin and, more specifically by Unilever (UK / Netherlands), which owns seven of the 15 of the top listed brands: skincare products Clear, Axe, Pond's, Sunsilk, Cantik-beautiful (from Citra Cantik Indonesia) the deodorant Rexona and Pepsodent, the toothpaste. According to Sancoyo Antarikso, Director of Governance & Corporate Affairs for Unilever Indonesia, 99% of the company's products are already Halal. Other European brands include Garnier (France), Pantene (Switzerland), Kotex with the product name Dunia Cewe (US) Cussons Baby (Sierra Leone), Strawberryet (Romania) and Durex (UK). Out of the 15 personal care brands only three are from Indonesia, namely, Natur-E Journey to Beauty, Rumah Cantik Citra and Wardah Cosmetics.

FIGURE 16: DEODORANT PRODUCTS ARE IN THE PHYSIQUE CATEGORY



Photo credit: [www.facebook.com/ClearMalaysia](https://www.facebook.com/ClearMalaysia)

## Fast Bikes

## 3 Brands, 0% Homegrown

Although the total number brands in the Fast Bikes category is not of significance here, the fact that two of the top 10-ranked brands are motorbike-related is important. Over 80% of Indonesian households own a motorbike.<sup>23</sup> Indonesia has a low average household income (about US\$575 per month)<sup>24</sup> and on many of the islands a poorly developed infrastructure; both factors make motorcycles an attractive fast-mobility alternative to driving a car. With Honda and Yamaha (Japan) in third and fifth place, respectively, compared to the other ASEAN countries, Indonesia makes a real difference in the category.

FIGURE 17: MOTORBIKES – TRULY INTERNATIONAL



### All in All

What makes the 100 leading Indonesia brands 'Remarkable and Wonderful' is the over one million Likes it takes for these brands to gain a position among the list. There is also quite an important position for Homegrown brands, particularly in the Fashion category where Indonesian brands receive more than half of the engagement in comparison to international companies. However, the Physique category is dominated primarily by European brands.

23. Wijeratne, D. and Lau, S. "Riding Southeast Asia's Automotive Highway," November 2015. <https://www.pwc.com/gx/en/automotive/autofacts/pdf/riding-southeast-asia-automotive-highway.pdf>

24. Euromonitor Research. "Indonesia's Rising Middle Class to Transform the Country's Consumer Market," 3 July 2012. <http://blog.euromonitor.com/2012/07/indonesias-rising-middle-class-to-transform-the-countrys-consumer-market.html>

# THAILAND

**OFFICIAL NAME**  
Kingdom of Thailand

**GDP**  
USD395.2 billion

**LANGUAGE**  
Siamese

**CAPITAL CITY**  
Bangkok

**INCOME GROUP**  
Upper Middle  
Income

**PRIMARY RELIGION**  
Buddhism

**INHABITANTS**  
67.9 million

**LAND AREA**  
510,890 sq.-km.

PERCENTAGE, %



**16.9**

GDP of ASEAN-6



**10.5**

Poverty



**60**

Facebook Users



**94**

Literacy

THE THREE F'S, TOTAL BRANDS

Homegrown 
  International



**31**

Food



**13**

Fashion



**9**

Phone



**18**

Others

## The Relationship Status of the Thai with Their Social-Leading Brands: Complicated?

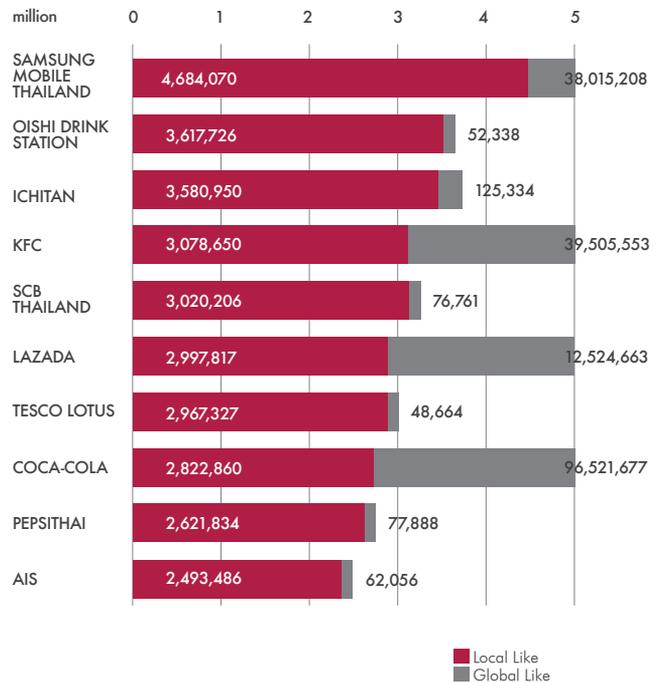
Thailand is the fourth most populous country in Southeast Asia with 68,281,876<sup>25</sup> people and has the second largest when it comes to GDP with US\$395.2 billion.<sup>26</sup> With its friendly people and their heart-warming Sawadika (Thai for hello) to its mesmerizing and breathtakingly beautiful tropical islands (such as Koh Phi Phi, Koh Lanta and Koh Samui), as well as its full-of-life cities like Bangkok and Chiang Mai, Thailand attracts a lot of tourists each year. In 2006, about 13.8 million people visited Thailand, whereas ten years later there were over 32.6 million tourists coming to this beautiful country.<sup>27</sup> In order to cater to the needs of the influx of tourists, The Tourist Authority of Thailand (TAT) had been established in 1979. Since then, TAT has launched numerous campaigns to attract more people every year. The tagline to one of their successful promotional campaigns in 2010 was 'Amazing Thailand / Always Amazes You,' and was developed by New York-based Global Advertising Strategies. Whereas TAT is working to make a brand out of Thailand, this study is more interested in the brands Thai people engage with, and relate to, on Social. In particular, our objective is to see whether the brands leading in Thailand's Social are homegrown, or come primarily from other countries. Because the Thai are known to love their country, and are seen as proud and loyal to their nation, we began with the working hypothesis that the Thai's choice for online engagement is mainly with their own brands. The use of the Internet and Facebook in the country is pretty low: 60% of Thai consumers are Internet users and 60% are Facebook users, amounting to 41 million Facebook users.<sup>28</sup>

**"AMAZING THAILAND / ALWAYS AMAZES YOU" WAS BY GLOBAL ADVERTISING STRATEGIES, BASED IN NEW YORK.**



PROMOTIONAL CAMPAIGN FROM 2010

GRAPH 10: TOP 10 BRANDS ON THAI SOCIAL



Note: number (in millions) of local Facebook Likes and the percentage of those Likes of all the global Likes

## Results: Food, Fashion, Phone... and Physique and Finance

Our study revealed that out of the country's Top 100 brands, 58 are of Thai origin, which makes Thailand very nationalistic with its own brands in this sample. The remaining brands are from 19 different countries: four them are from ASEAN partners, Malaysia and Singapore; 9 out of 43 are from Asia, of which two are Japanese and three are Chinese, and 16 of the brands are from the US. The top 10 brands have over 31.9 million Likes coming from Thailand. To qualify for the list of the 100 leading social brands, a brand needs to get over 660,667 Local Likes. As previously reported, the themes of the brands commonly shared in ASEAN are Food, Fashion and Phones; 55% of the top brands fall into the ASEAN F categories yet, Thais prefer their own unique brands for each category (31 Food, 13 Fashion, 11 Phones). Furthermore, Thailand has two additional brand themes — brands related to Physique (nine brands) and Finance (nine).

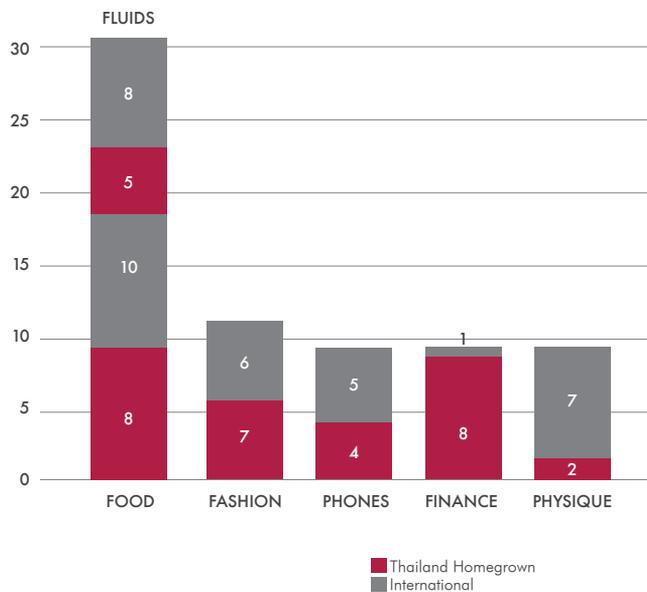
25. Worldometers.info "Thailand Population." <http://www.worldometers.info/world-population/thailand-population/> (accessed 26 May 2017).

26. The World Bank. "World Development Indicators." <http://databank.worldbank.org/data/download/GDP.pdf> (accessed 27 April 2017).

27. Vanhaleweyk, G. "Tourism Statistics Thailand 2000-2017," May 2017 <http://www.thaiwebsites.com/tourism.asp>

28. Internet World Stats. "Usage and Population Statistics." <http://www.internetworldstats.com/asia.htm> (accessed 17 May 2017).

GRAPH 11: CATEGORIES ON THAI SOCIAL



Food

### 31 Brands, 42% Homegrown

The Top 100 brands consist of 18 food brands, eight of which are from Thailand: Tao Kae Noi, (tknclub.com), Tesco Lotus, Ai Japanese Village, SizzlerThai, BigCBigService, The Pizza Company 1112 Lovers, MK Restaurants and Hot Pot Buffet. Other food brands are 7-Eleven (Japan), Cornetto (Italy) and Magnum (Belgium). Seven of the brands are from the US — KFC, McDonald’s, Dairy Queen, Lays, Burger King, We Love Swensen’s and Pizza Hut. KFC, together with Tesco Lotus, is among the top 10 most Liked Facebook brands. They have 3,078,650 and 2,967,327 local fans, respectively.

Drinks appear to be a very prominent part of this category in Thailand. Out of the Top 100, including alcoholic drinks, 13 brands are related to beverages. Apparently, Thai people seem to be particularly fond of their fizzy drinks, however, their government seems to be less happy with the high amount of sugar consumption that comes with this habit. At the moment, it is imposing taxes on drinks that contain more than a certain amount of sugar. Despite this measure, the brands top 10 consists of no less than four beverage brands; in second and third place are the Thai brands Oishi Drink Station and Ichitan, respectively. Global rivals Coca-Cola and Pepsi rank in eighth and ninth place, respectively. Research conducted by W&S

Market Research<sup>29</sup> shows which kind of marketing strategy the ‘black drinks’ producers utilize. Music marketing is implemented by Coca-Cola, while Pepsi focuses on sports and Big Cola (ranking 65th) uses differentiated marketing. Apparently, it’s the music that seems to be the best way to catch potential Thai buyers. In total, 38% of the Fluids brands are homegrown.

In addition to fizzy drinks, alcohol is also popular in Thailand. One reason for this could be that the country has a smaller Muslim population — 90% of the people in Thailand are Buddhists, a religion that does advise against drinking alcohol, but does not judge and strictly enforce the no-alcohol rule on lay practitioners. Brands like Johnnie Walker (UK), Chang (Thailand) and Smirnoff (UK) are the most popular. Other popular beverage brands are related to coffee, namely Starbucks (US) and Nescafé (Switzerland).

Surprisingly, and contrary to expectations, one Thai candidate which is one of the world’s best-known beverage brands, failed to make it into the Thailand’s Top 100: Red Bull. Originally, a Homegrown Thai brand, locally known by its original name of Krating Deang, is a sweetened, non-carbonated energy drink. It was developed by antibiotics salesman Chaleo Yoovidhya as a refreshment for rural laborers but once Austrian Dietrich Mateschitz forged a joint venture with the founder and his son, current CEO, Chalerm, the brand made its international appearance, although in a different fashion. When the product was launched in Austria in 1987, it was repositioned as a trendy, upscale drink and first introduced at Austrian ski resorts. In 1992, the product expanded to other international markets, using guerilla tactics to target Generation Y consumers. Now, with a global FB fan base of almost 48 million Likes, Red Bull occupies the number three position in the world.<sup>30</sup> However, for whatever reason (probably due to the wildly different positioning at home in Thailand than the one abroad), the online engagement with Red Bull in Thailand is much lower with less than 400,000 Likes, a number not high enough to make it over the threshold for our Thai Social Brands Top 100.

FIGURE 19: THAI BRAND OISHI DRINK STATION



Photo credit: www.facebook.com/OishiDrinkStation

29. W&A Marketing Research. “Soft Drink Market Studies in Thailand,” 29 December 2014. <http://www.slideshare.net/WS-Thailand-Market-Research/soft-drink-marketstudiethailand>  
 30. Socialbakers. “Facebook Statistics – Brands.” <https://www.socialbakers.com/statistics/facebook/pages/total/brands/> (accessed 26 May 2017).

Fashion  
Chut Thai (Thai Outfit)

## 13 Brands, 54% Homegrown

With the annual Bangkok Fashion Week and ELLE Fashion Week, the Thai people, like the other ASEAN populations, love fashion. One striking fact, however, is that the fashion brands are dominated by Thailand itself. With seven out of 13 Homegrown brands, Thailand is the biggest player in the Fashion category, with respect to popularity: Panicloset, DIARIEZ, SLYQ, Striptap, WearYouWant, ฅบขกบ Nanyang and Zink Superglasses & Coolstuff. Although Thailand has a strong presence, with brands by Lazada, Adidas and Zalora, Germany also has a high representation in the country's fashion market. From 2015 to 2016, Lazada and Adidas showed remarkable growth; Lazada's local fan base grew almost 29%, which resulted in a rise of its position from ninth to sixth place. Adidas' fan base nearly doubled, from 981,000 local fans in 2015 to 1,607,000 fans in 2016, resulting in a rise from 44th to 23rd place on the list. With only four store-based fashion brands, e-commerce plays a significant role for Thai fashion consumers. Additionally, there are only two fashion brands from the US in the Top 100, namely FA2-shop and Body Glove.

FIGURE 20: THE THAIS LOVE THEIR FASHION BRANDS



Photo credit: [www.instagram.com/lazada\\_th/](http://www.instagram.com/lazada_th/)

Phones

## 11 Brands, 36% Homegrown

The Phone category is ranked third among all of the ASEAN Social Leading brand categories. With a mobile network coverage of over 95%, connectivity in Thailand is well-established and the market is growing at an enormous rate. In 2013, there were 14.4 million phone users; just three years later, that number had increased to 19.8 million. Experts say that by 2021 the demand for phones will be 27.5 million.<sup>31</sup> In Thailand, there are 10 phone-related brands in two segments — the mobile service providers and the mobile phone manufacturers. As is the case in Singapore and Indonesia, the domestic brands are all service providers and the foreign brands are the manufacturers. The most popular service providers are; AIS (ranked 10), Dtac (14), True Move (35) and Mobile Expo (51) Among the manufactures, there are different brands from different countries. The most popular brand in Thailand is Samsung (ranked in the first spot; South Korea, followed by Oppo (ranked 29; China), Blackberry (60; Canada), Huawei (69; China), Intel (82; US), Asus (83; Taiwan) and the Microsoft Lumia (97; US). Samsung has been leading the brand list for two consecutive years with 4.6 million Local Likes in 2016. Blackberry lost its popularity, slipping from 48th position in the 2015 rankings to 60th in 2016; the number of Likes went down from 944,000 to 900,000. On the other hand, there were two new entrants in the Phone category in 2016; Huawei and the Microsoft Lumia entered the list at 69th and 97th place, respectively. The overall conclusion is that the demand for phones is expanding and that growth is expected to continue over the coming years.

FIGURE 21: THE PHONES CATEGORY IS GROWING RAPIDLY



Photo credit: [www.facebook.com/samsungmobilethailand](http://www.facebook.com/samsungmobilethailand)

31. Statista. "Number of Smartphone Users in Thailand from 2013 to 2021 (in millions)." <https://www.statista.com/statistics/467191/forecast-of-smartphone-users-in-thailand/> (accessed 26 May 2017).

## Physique

### 9 Brands, 22% Homegrown

In the Physique category the Thai do not have the strong preferences for Homegrown brands as they do in other categories. Only two brands in the category — Oriental Princess Society (ranked 30) and MERREZ'CA (70) — are from Thailand. Interestingly, the dominance of the European brands is not present either. KUTE CLUB (China,) Watsons (Hong Kong), BabyLove (Australia), Sunsilk (UK), Johnson's Baby (US), THEFACESHOP (South Korea) and Axe (France) are the other category brands.

FIGURE 22: A LOCAL AD IN THE PHYSIQUE CATEGORY



Photo credit: [www.facebook.com/watsonsthailand](http://www.facebook.com/watsonsthailand)

## Finance

### 9 Brands, 89% Homegrown

The Thai have a specific category in common with Singapore: Finance. For Thailand, Foreign Direct Investment (FDI) inflow fluctuates considerably. From a peak of 16,652 million in 2013, it dropped to 3,537 million in 2014, and grew again to 10,845 million in 2015 (6.6% of the total ASEAN block).<sup>32</sup> All finance brands from the Top 100 are homegrown, except for CIMB from Malaysia (ranked 66th). The Thai brands are: The Siam Commercial Bank (SCB) Thailand (5), KBank Live (18), SilkSpan (19), TrueMoney (22), KTB Care (37), Krungsri Simple (44), Gold Traders (47) and TMB (75). A reason for the popularity of financial brands in Thailand could be related to the number of private sector loans. During the period of 2006–2010, the total amount of loans remained relatively

stable at around ฿2,250 billion (the local Thai Baht currency), or US\$66 billion. After 2010, the total amount increased to a little less than ฿3,850 billion, or US\$113 billion today, a significant +71% increase.<sup>33</sup> This could be the result of the interest rates, which decreased steadily from 2012 to 2016.<sup>34</sup> This makes sense because taking a loan at a low interest rate is cheaper, increasing demand. Overall, it is safe to say that during recent years the popularity of the financial sector and, therefore, finance-related brands have gone up, namely to the benefit of local players.

FIGURE 23: MANY TOP 10 FINANCE BRANDS ARE HOMEOWN HERE



Photo credit: [www.instagram.com/scb\\_thailand](http://www.instagram.com/scb_thailand)

## Conclusion: Relationships of the Thai with their Own National Brands – Is it Complicated?

There is a high likability factor for Homegrown brands in Thailand; almost 60% of the Top 100 liked brands are Thai. This percentage is particularly significant when compared to the three previously reported countries of Malaysia (35% of that country's most-liked brands are homegrown), Singapore (30%) and Indonesia (33%), Thailand also has very high scores of 'local content' in ASEAN-shared categories: Food (42%), Fashion (54%) and Phones (36%). Some argue that the strong choice for Thai national brands and national pride can be traced back to the fact that the country was never colonized by foreign powers. Perhaps one factor is that Thailand has maintained its own language without many influences from other countries. Yet, interestingly, in the case of Thailand's Red Bull brand, we don't see the usual positive feedback loop of international recognition enhancing the national popularity of a Homegrown brand. While the Thai appear to engage with many of their own brands, they do not much like the Thai brand that so many people love abroad. How would the Thai report their FB relationship status with their own successful brands abroad? Is it complicated, or is the case of Red Bull / Krating Deang a special one?

32. Santander Trade Portal. "Thailand: Foreign Investment," May 2017. <https://en.portal.santandertrade.com/establish-overseas/thailand/foreign-investment#fdi>

33. Trading Economics. "Thailand Loans to Private Sector." <http://www.tradingeconomics.com/thailand/loans-to-private-sector> (accessed 26 May 2017).

34. Trading Economics. "Thailand Interest Rate." <http://www.tradingeconomics.com/thailand/interest-rate> (accessed 26 May 2017).

# PHILIPPINES

## OFFICIAL NAME

Republic of Philippines

## GDP

USD292.5 billion

## LANGUAGE

Filipino

## CAPITAL CITY

Manila

## INCOME GROUP

Lower Middle Income

## PRIMARY RELIGION

Christianity

## INHABITANTS

100.7 million

## LAND AREA

298,170 sq.-km.

### PERCENTAGE, %



12.5

GDP of ASEAN-6



25.2

Poverty



52

Facebook Users

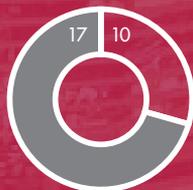


96.6

Literacy

### THE THREE F'S, TOTAL BRANDS

Homegrown International



27

Food



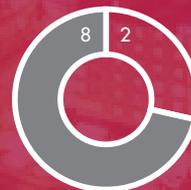
22

Fashion



24

Phone



10

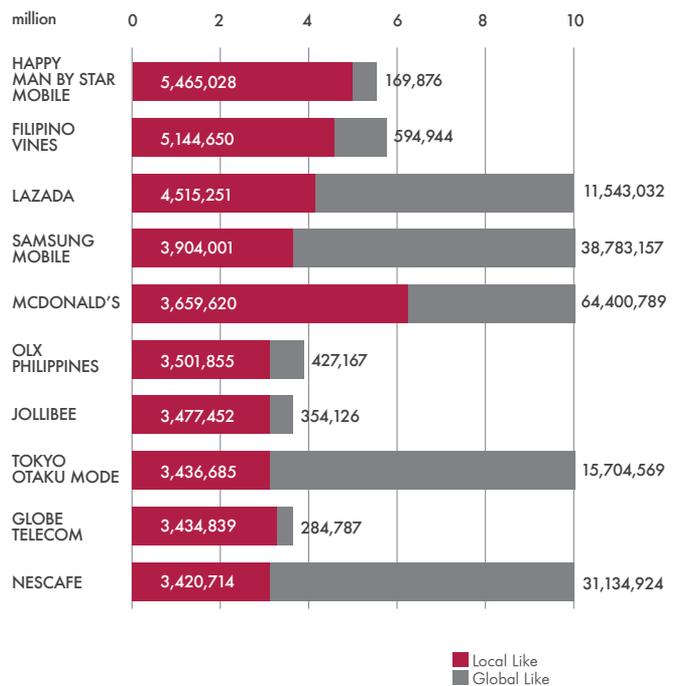
Others

**How Filipino Brands Compete in ASEAN:  
Does Fun Lead to Fans?**

The Philippines is the second-largest ASEAN country, after Indonesia, both in terms of the number of people (over 100 million inhabitants) and islands (7,017). Although the state is secular, 92% of its population is Christian; the nation consists of about 11 major ethnic groups who speak about 19 different languages. Its economy of US\$292.5 billion is currently one of the most dynamic economies in the East Asia region, with sound economic fundamentals and a globally-recognized competitive workforce, according to the World Bank. In the past five years, average annual growth has been robust, registering an 6.2% increase from 2010–2015, significantly higher than the 4.5% growth reported over the period of 2000–2009.<sup>35</sup> The country’s economic development did not come easy and Filipinos would be among the first to say so. For example, every year an average of eight to nine typhoons or tropical storms make landfall in the country.<sup>36</sup> Situated in the ‘Pacific Ring of Fire,’ the country regularly experiences seismic and volcanic activity resulting in strong disruptive earthquakes. There are internal political struggles plagued with excessive corruption — anti-corruption watchdog Transparency.org rates the country at a weak 101th position, which is similar to Thailand.<sup>37</sup> Moreover, there is a huge income gap and widespread poverty. But when asked about their strengths and qualities, the Filipinos are very proud of their caring ways, hospitality, as well as their Pinoy (an informal demonym referring to the Filipino people) creativity and adaptability.<sup>38</sup> They hold dear how they interact with those close to them and others outside their kin circle. A large group of Filipino brand ambassadors for this cultural trait include millions of doctors, nurses, caregivers and nannies who work abroad. Numerous internationally-recognized talents in music like YouTube-Singer Charice Pempengco, and actress / singer and Golden-Globe winner Hailee Steinfeld (whose maternal grandfather was half Filipino) shows that the country is rich with visual artists, animators, fashion designers (among whom is Hollywood’s iconic fashion designer Monique Lhuiller), in addition to many other artists. Filipinos regard themselves as making waves in the international scene, particularly in entertainment and the creative and design industries. Other performer / entertainers with ties to the Philippines include: Lea Salonga (a Tony Award-winner and voice of Disney’s Mulan and Jasmine), Allan Pineda (of the Black Eyed Peas), Arnel Pineda (Journey’s new lead singer), Bruno Mars and Nicole Scherzinger (recording artists) and Vanessa Hudgens (actress and singer).

To reflect its people’s outgoing nature, the nation’s Department of Tourism launched the campaign ‘It’s More Fun in the Philippines’ in 2012. The new National Government is expected to reconsider the catchy slogan, not being convinced that the slogan brings in enough tourists. Last year, tourist arrivals were six million but the target for 2022 is double that at 12 million.<sup>39</sup> Here, we wish to explore how ‘Out-going’ and ‘Fun,’ the taste and preferences for brands, work among Filipinos themselves. In the Philippines, the use of Internet and Facebook is rapidly on the rise: 54 of the 102 million Filipinos (52%) are Internet users. Moreover, the same number of people are on Facebook, amounting to 54 million Facebook users.<sup>40</sup>

**GRAPH 12: TOP 10 BRANDS ON FILIPINO SOCIAL**



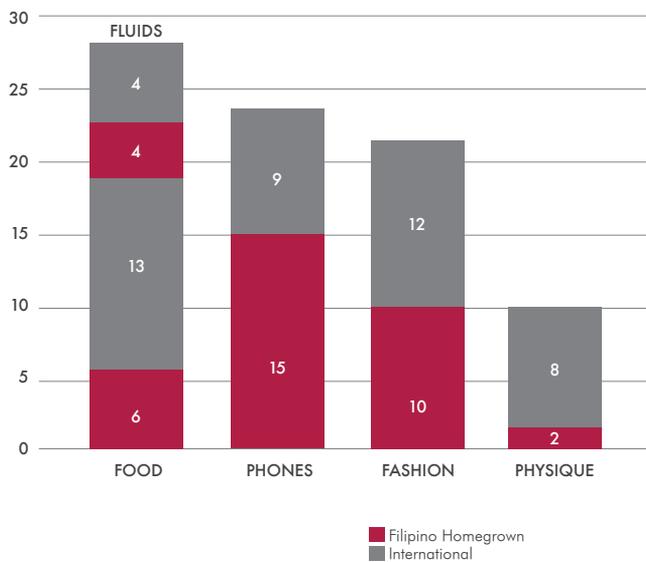
Note: number (in millions) of local Facebook Likes and the percentage of those Likes of all the global Likes

35. The World Bank. "Where We Work / Philippines." <http://www.worldbank.org/en/country/philippines/overview> (accessed 12 April 2017).  
 36. Brown, S. "Philippines Is the Most Storm-Exposed Country on Earth," (11 November 2013). <http://world.time.com/2013/11/11/the-philippines-is-the-most-storm-exposed-country-on-earth/>  
 37. Transparency International. "Corruption Perceptions Index 2016," 25 January 2017. [https://www.transparency.org/news/feature/corruption\\_perceptions\\_index\\_2016](https://www.transparency.org/news/feature/corruption_perceptions_index_2016)  
 38. Wong, A. C. "What Filipinos Can Be Proud Of," 29 July 2012. <http://globalnation.inquirer.net/45875/what-filipinos-can-be-proud-of>  
 39. Nilles G. "DOT Dropping 'It's More Fun in Philippines,'" 2 September 2016. <http://www.philstar.com/headlines/2016/09/02/1619669/dot-dropping-its-more-fun-philippines>  
 40. Internet World Stats. "Usage and Population Statistics," 17 May 2017. Accessed from <http://www.internetworldstats.com/asia.htm>

Results: Food, Fashion, Phone and.... Physique.

Of the 100 top brands, 45 of which are from the Philippines showing an inclination towards Homegrown brands. The remaining brands are from 19 other countries, three of which are from ASEAN partners. There are 14 brands from the rest of Asia, five from Japan, three from China, 22 from the US and five from the UK. The Top 10 brands have almost 40 million Likes from the Philippines. To qualify for the list of 100 leading social brands, a brand must achieve over 1,023,643 Local Likes. As reported in the first part of this section, the themes of the brands commonly shared in ASEAN are Food, Fashion and Phones. Of the top brands, 72% fall into these three categories, however Filipinos prefer their own unique set of brands within these categories. Furthermore, the Philippines has one additional brand category — Physique — which has been addressed as an important category in both Indonesia and Thailand.

GRAPH 13: CATEGORIES ON FILIPINO SOCIAL



Food

27 Brands, 37% Homegrown

Like all other ASEAN countries, the Filipinos also love their food; Fast-food brands are especially popular on Social. With McDonalds and Jollibee in the fifth and ninth places, respectively; KFC, Pizza Hut and Dunkin’ Donuts are also in the Top 100 list. Another striking score, and one similar to Singapore, is the popularity of chocolate-related brands including KitKat, Oreo, Cornetto and Toblerone. There are nine brands from the US, followed by 10 from the Philippines, two from Switzerland and two from the UK. Comparing the results obtained in 2015 and 2016, it is worth noting that all food-related brands have lost places in the Top 100 list, except for Jollibee who remained seventh position and McDonalds, which rose from the number nine spot to number five. From 2015–2016, all eight ‘Fluids’ brands dropped positions on the rankings; half of them are Homegrown. This decline in the popularity of fluids is alarming for the local beverage industry. San Mig Coffee, Red Horse Beer, Royal and C2 Cool and Clean are all from the Philippines. The other brands are from the US (Starbucks and Coca-Cola), Australia (Milo) and from Switzerland (Nescafé).

FIGURE 24: FAST-FOOD IS VERY POPULAR IN THE PHILIPPINES



Photo credit: www.facebook.com/JollibeePhilippines

Fashion

## 22 Brands, 45% Homegrown

Fashion is the most popular category among the Top 100 most Liked brands in the Philippines. Of the 21 brands, there are eight Homegrown brands and 13 foreign ones, showing that Filipinos are receptive to the international fashion industry and the evolving trends. The nine local brands are: Penshoppe, ForMe, Sneakers Avenue, OXYGEN, World Balance, SM Accessories, Parisian Shoes and Bags, Plains are Prints, The SM Store and SM Shopmag. Seven countries represent the remaining 12 foreign brands: Havaianas (Brazil), Adidas (Germany), Lazada and Zalora (Germany / Singapore), Tokyo Otaku Mode and UNIQLO (Japan), H&M (Sweden), Burberry (UK), and finally Nike Basketball, Nike, Converse and Keds (US).

FIGURE 25: FASHION RULES AS THE MOST POPULAR CATEGORY



Photo credit:Lazada Philippines

Phones

## 24 Brands, 63% Homegrown

The Philippines has a high likeability for phone-related brands. It is striking to note that they have a higher preference for their own Telecom brands such as Happy Man (Starmobile), MyPhone, Firefly Mobile, Kata, SM Cyberzone, SKK Mobile Phone, Kimstore, Torque, Globe Telecom, Smart Communications, ABS-CBNmobile, TNTph, Cherry Mobile, Sun Prepaid and PLDT Home. One reason for the popularity of phones could be a refined cellular phone industry and consumer base in the Philippines; customers are well-aware of industry dynamics and attracted to peer-to-peer payments through Pass-a-Load or Share-a-Load (prepaid) and subscriber phones. Text messaging is a popular form of communication; in 2007, the nation sent an average of one billion SMS messages per day. Ten years later it seems that the country had shifted from being the ‘texting capital of the world’ to being the ‘social media capital of the world.’<sup>41</sup> Similar to the other ASEAN countries, in the Philippines consumers also like phone brands Oppo, Huawei and Lenovo (all from China). Also on the Top 100 list is Acer, Asus (Taiwan), Intel, Razer (US), Sony (Japan), and Samsung (South Korea).

FIGURE 26: PHONES, PHONES, PHONES



Photo credit: www.facebook.com/pg/starmobilephones

41. Hansen M. B. "Philippines – From Text-Messaging Capital to most 'Social Nation'," 30 July 2015. Accessed from <http://www.operasoftware.com/blog/smw/the-philippines-from-text-messaging-capital-to-most-social-nation>.

## Physique

### 10 Brands, 20% Homegrown

Finally, Physique is another popular category in the Philippines, dominated by six of the Unilever brands — Dove, Sunsilk, Axe, Close Up, Cream Silk and Pond's. Two popular Homegrown brands are Silka Skincare and Juicy Cologne and rounding out the list are Palmolive Naturals and Avon (US).

FIGURE 27: ONE OF THE DOMINANT PHYSIQUE BRANDS



Photo credit: [www.dove.com/ph](http://www.dove.com/ph)

## Conclusion

In this study, we have explored which brands are leading in the Filipino's social media space. Specifically, we wanted to explore the preferences and tastes for brands among consumers in the Philippines, and see whether they are as 'out-going' and 'fun' as the Filipinos themselves. Our findings show that Filipinos are inclined towards both their Homegrown and international brands, in comparison to the ASEAN-6 region. The popularity of international brands might be a result of two related factors. First, international connections are formed by the large number of Filipinos who live overseas. As of 2013, approximately 10 million Filipinos were estimated to be living in other countries.<sup>42</sup> Second, the country's colonial past, from the early 20th century, can explain why the widely shared interest in American brands stood out with 22 positions. It might be a consequence of the 48-year bond between the Philippines and the US, from 1898

until 1946. According to a recent PEW Research report, Filipinos like the US even more than Americans do;<sup>43</sup> they seem to look up to Americans and American pop culture, hence idolizing their aspirational brands. Another testimony to Filipino admiration can be seen in the adaption of popular American TV Shows, such as "American Idol" named Philippine Idol and "America's (renamed Philippine's) Next Top Model.". This international exposure allows the Filipinos to be continuously familiar with the outside world and its ever-fascinating brands. Finally, Filipinos are outgoing; their preferences for brands are 'outgoing'. Yet, their own brands seem to lag behind. Many Filipino brands still need to 'go out' and get their international following, as only Enervon-C a vitamin supplement from Unilab managed to obtain a Top 100 placement in one of its ASEAN partners — it made it to Indonesia's Top 100 but only in last position.

42. Commission on Filipinos Overseas. "Stock Estimate of Overseas Filipinos," December 2013. <http://www.cfo.gov.ph/images/stories/pdf/StockEstimate2013.pdf>

43. Rappler.com. "Filipinos Like the US even more Than Americans Do - Pew Research," 23 April 2014. <http://www.rappler.com/nation/56085-philippines-usa-pew-research>

# VIETNAM

## OFFICIAL NAME

Socialist Republic of Vietnam

## CAPITAL CITY

Hanoi

## INHABITANTS

91.7 million

## GDP

USD193.6 billion

## INCOME GROUP

Lower Middle Income

## LAND AREA

310,070 sq.-km.

## LANGUAGE

Vietnamese

## PRIMARY RELIGION

Folk religion

PERCENTAGE, %



8.3

GDP of ASEAN-6



13.5

Poverty



41.9

Facebook Users



94.5

Literacy

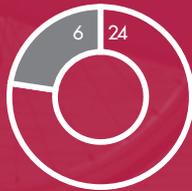
THE THREE F'S, TOTAL BRANDS

Homegrown International



19

Food



28

Fashion



17

Phone



9

Others

The Communist Party of Vietnam is having an important anniversary in 2017; it was sixteen years ago that the ruling Party approved a 10-year economic plan enhancing the role of the private sector, while also reaffirming the primacy of the state. Sixteen years is a good block of time from which to explore how Vietnamese branding themes have come of age and to identify which are powerful Social brands.

Questions driving our study include: Which national and international brands dominate Vietnamese social media? Specifically, are there preferences for either of the two? As the regionalization of ASEAN goes beyond the elimination of trade barriers and promotion of foreign direct investments into each other's economies, further market integration ultimately results in appreciating, and liking, each other's brands. Here we examine which brands lead in ASEAN's social media space, giving us a better understanding of digitized customers in Southeast Asia's digitized market environments.

With 95,261,021 inhabitants, Vietnam ranks third in terms of population within the ASEAN block. Its GDP, however, totals US\$193.6 billion and is the smallest of the group. Following a difficult period during the Vietnam War and the post-war embargo enacted by the US and most of Europe, the Communist party introduced economic reforms. These governmental changes allowed private ownership, enabling Vietnam to move from being primarily an agriculture-based society to a manufacturing and high-tech economy. Furthermore, patent rights have been strengthened and trade liberalized. These reforms provide Vietnam with good prospects for the future, as illustrated by forecasts from Goldman Sachs,<sup>44</sup> PwC<sup>45</sup> and HSBC,<sup>46</sup> which all expect the Vietnamese economy to grow rapidly into a major player in Southeast Asia in the coming decades.

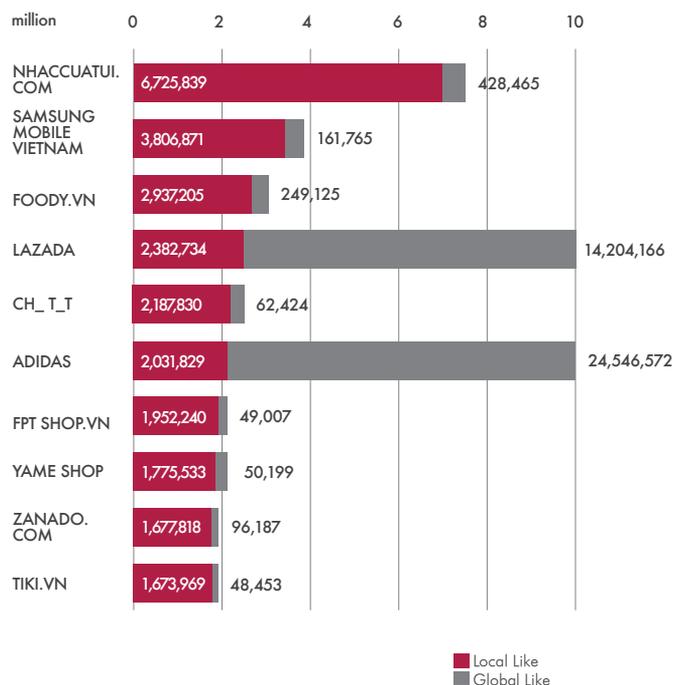
In terms of marketing the country, Vietnam received more than 6.8 million international arrivals in 2012, up from 2.1 million during the year 2000. This is also important in terms of the share of GNP it generates, namely 6.6%. Most tourists originate from China (2.7 million). ASEAN countries are represented in seventh, ninth and 10th place by Malaysia, Thailand and Singapore, respectively.<sup>47</sup> This allows for improvements in terms of integration of the ASEAN region. The Vietnam National Administration of Tourism currently uses the slogan 'Vietnam – Timeless Charm' in order to promote tourism.

FIGURE 28: THE COUNTRY'S TOURISM BOARD SLOGAN



While the Vietnam National Administration of Tourism is concerned with the perception of the Vietnamese brand, we are more interested in how the Vietnamese view Homegrown and international brands. In Vietnam, the use of the Internet is pretty low: only 49 of the 95 million Vietnamese consumers (51.4%) are Internet users. About 81.5% of them are also Facebook users, amounting to 40 million Facebook users.<sup>48</sup>

GRAPH 14: TOP 10 BRANDS ON VIETNAMESE SOCIAL



Note: number (in millions) of local Facebook Likes and the proportion of those Likes of all the global Likes

44. O'Neill, J., Wilson, D., Purushothaman, R. and Stupnytska, A. "How Solid are the BRICs?" Global Economics Paper No: 134, 2005.

45. Hawksworth, J., Clary, R. and Audino, H. The Long View How Will the Global Economic Order Change by 2050? PwC pressroom, 2017.

46. Ward, K. "The World in 2050." HSBC Global Economics, 2012.

47. Wikipedia. "Tourism in Vietnam." [https://en.wikipedia.org/wiki/Tourism\\_in\\_Vietnam](https://en.wikipedia.org/wiki/Tourism_in_Vietnam) (accessed 19 May 2017).

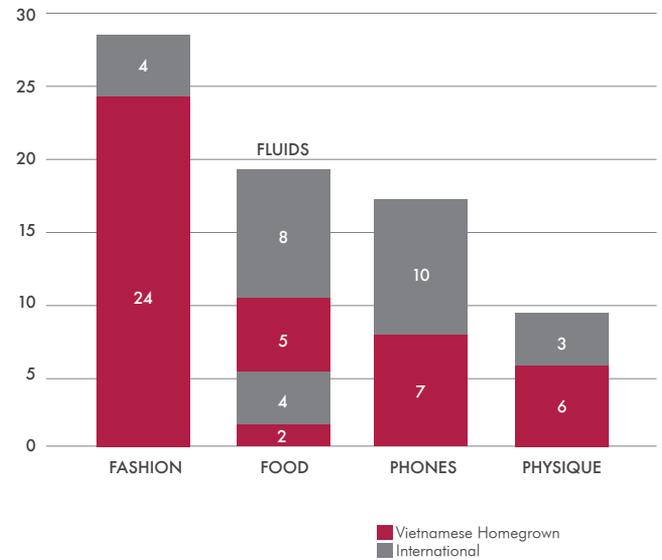
48. Internet World Stats. "Usage and Population Statistics." Accessed from <http://www.internetworldstats.com/asia.htm> (accessed 17 May 2017).

**Results: Food, Fashion, Phone and.... Physique.**

Our study revealed that out of the 100 top brands, 83 brands are of Vietnamese origin. However, 15 of the companies that are homegrown are actually subsidiaries of international brands. One example is Samsung Mobile Vietnam, ranking at second place on the list. These brands build on the brand equity of the international parent company. As a result, these will be considered international and not homegrown. The reason international players use a separate subsidiary for operations in Vietnam might be caused by the regulations, which restrict foreign parties from entering the Vietnamese market. Although the Vietnamese government is relaxing these regulations, it is likely to have an impact because many firms already have the subsidiary in place. For example, foreign parties are not allowed to provide Internet or telecommunication services. Moreover, certain sensitive and highly specialized sub-sectors such as banking, telecommunications, transportation, agriculture and audiovisual services still maintain foreign ownership restrictions.<sup>49</sup> Finally, in some sectors, foreign parties may only be able to enter the market through a joint venture. Still, this leaves the Vietnamese people with 68 truly Homegrown brands in the Top 100. With this number it overtakes Thailand (58) as the most nationalistic country in terms of brand preferences.

The remaining brands are from 11 different countries; 10 out of 32 of them are from Asia, of which three are from ASEAN; 11 are from the US and five from Germany. Given Vietnam’s proximity to Cambodia, Laos and Thailand, it is quite remarkable that no brands from these countries made it to the Top 100. The top 10 brands have over 27.2 million Likes coming from Vietnam. To qualify for the list of 100 leading social brands, a brand needs to get over 500,000 Local Likes. As we reported in the first article of this series (‘The Three F’s of ASEAN brands’) the brand themes are commonly shared with other ASEAN countries — Food, Fashion and Phones. Sixty-six percent of the top brands fall into the ASEAN F categories, yet the Vietnamese prefer their own unique different set of brands for each within these categories, compared to their neighboring countries (28 Fashion, 19 Food, 17 Phones). Food is substantially less favored on Vietnamese Social, compared to the other ASEAN countries in this series, which averages 26 brands. Furthermore, Vietnam has one additional brand theme; brands related to Physique (9). Combining these categories with the ASEAN F’s, they make up 64% of the Top 100 brands in Vietnam. However, this most Liked brand, NhacCuaTui.com, does not belong to these categories but is instead music-related.

GRAPH 15: CATEGORIES ON VIETNAMESE SOCIAL



**Fashion**

**28 Brands, 86% Homegrown**

All the ASEAN countries are very passionate about fashion. However, Vietnam takes the cake. Moreover, the country’s consumers also have the strongest preference for Homegrown brands. The top Vietnamese brands are YaMe Shop (ranked eighth), Zanado.Com - Cộng đồng (ninth), Thời Trang Daisy (22), CucRe.vn (30) and Rê Mỗi Ngày (32). The most prominent international influence comes from Germany with Lazada (ranked fourth), Adidas (six) and Zalora (41). The only other international fashion brand is the Japanese Tokyo Otaku Mode, which is ranked in 92nd place.

FIGURE 29: ON THE RUNWAY IN VIETNAM



Photo credit: www.waah.tv/vietnam-international-fashion-week-2015-in-ho-chi-minh-city/

49. “Mayer Brown JSM Guide to Doing Business in Vietnam,” 2016. <https://www.mayerbrown.com/files/Publication/d50296ec-1a78-426f-bb80-19f26d82e709/Presentation/PublicationAttachment/a733e0f7-4d69-4032-aa19-662ebda028c1/GuideToDoingBusinessInVietnam.pdf>

## Food

## 19 Brands, 37% Homegrown

The Top 100 brands consist of 19 Food entries, seven of are from Vietnam — Foody.vn (ranked third) and Lotteria Vietnam (21) for food. In the Fluids category Nước Tăng Lực Number 1, YoMost, Trà Thanh Nhiệt Dr. Thanh, Trà Xanh Khong Do and Number 1 Dâu & Chanh are the local brands. The other food brands are mostly US Fast-food chains, namely KFC (ranked 13), Baskin-Robbins (24) and Pizza Hut (37) and fizzy drinks, namely Coca-Cola (12), Sprite (71), Pepsi (76), Sting World (78) and Fanta (87). Moreover, just as in Thailand, alcoholic beverages are among the top brands in Vietnam. Heineken (ranking 26) and Tiger Beer (74) are the two alcoholic brands in the list, both of which are international. The other Homegrown brands offer products such as ice tea, sports drinks, coffee, yoghurt drinks and a food review community. With regards to the global rivalry between Coca-Cola and Pepsi, Coca-Cola is the clear winner here. It is the 12th ranked brand in Vietnam and takes the top position in the Fluids category. Pepsi is in the 76th place in the country. Even Sprite, another brand from Coca-Cola, is ranked higher in the 71st place.

FIGURE 30: THE VIETNAMESE LOVE THEIR LOCAL FOOD BRANDS



Photo credit: [www.facebook.com/ilovelotteria](http://www.facebook.com/ilovelotteria)

## Phones

## 17 Brands, 41% Homegrown

The second most important ASEAN brand category in Social Likes is Phones. Unlike with the Fashion category, international and Homegrown brands are more evenly balanced in terms of importance. Samsung (second in the ranking) assumes the highest position in the category. On the other hand, the four next most Liked brands are FPT Shop (Fptshop.com.vn), Mobiistar, Viettel Telecom and Viễn Thông are in seventh, 11th, 19th and 27th position, respectively. Valued international brands are similar to the other ASEAN countries, namely Android (ranking at number 19), OPPO (20) and Microsoft Lumia (44). Interestingly, many liked brands are subsidiaries of large international brands, especially in this category. The telecommunications industry is one of the more protected sectors in Vietnam, which may explain why the international brands choose to use subsidiaries. Another potential reason is that international brands try to act as a Homegrown brand in order to appeal more to the Vietnamese who have a strong preference for local merchandise. OPPO, Android, HTC, LG, Toshiba, Huawei and Samsung all own local brands in Vietnam.

FIGURE 31: PHONES RANK A CLOSE SECOND IN SOCIAL LIKES



Photo credit: [www.facebook.com/mobiistar](http://www.facebook.com/mobiistar)

## Physique

## 9 Brands, 67% Homegrown

Personal care is another very popular category in Vietnam. The Vietnamese have a strong preference for Homegrown brands. The top brands are the California Fitness & Yoga Centers Vietnam (ranking at number 15), Nổi Tóc Thảo Tây (18), Bé Khỏe Lớn Nhanh (45), THẨM MỸ VIỆN MAILISA (51) and Hội những người muốn tăng cân tăng cơ (65). The only international brands in this category are Rejoice Vietnam, a brand marketed by Procter & Gamble and ranking 53 on the Likes list, Unilever's Pond's brand is 67th (US) and Maybelline New York — Vietnam, by L'Oreal, ranks number 70 (France). Most of the brands offer beauty products for women, while two of them are fitness centers.

FIGURE 32: HOMEGROWN PREFERENCE IN PERSONAL CARE PRODUCTS



Photo credit: [www.facebook.com/cfyvvn](http://www.facebook.com/cfyvvn)

## The Vietnamese Position Towards International Brands

Vietnam is the ASEAN country whose consumers have the highest likability for Homegrown brands — 68% of the Top 100 brands are Vietnamese. Comparing this to the five previously reported countries: Malaysia at 35%; Singapore has 30%; Indonesia with 33%; the Philippines with 45% and Thailand recording 58%. With respect to the ASEAN-shared categories of Food, Fashion and Phones, Vietnam greatly values Fashion and Phone, but the Food brands appear to hold a less important presence in the social media space. Yet, there is an above average interest in Physique and Fluids brands. In most of these categories Vietnamese brands are dominant, except in Food and Fluids where international players like KFC, Baskin-Robbins, Coca-Cola and Pepsi have a significant influence. The weak representation of international brands in Vietnam may be the result of a long tradition of regulation, which have forced foreign parties to make use of subsidiaries. This could also be explained by the late entry of foreign brands into the country due to international tensions and the trade embargos enforced by the US and many European countries after the Vietnam War. The Homegrown brands may have been able to become well-established prior to any real challenge from international players arriving in the country. Regarding the penetration of other ASEAN brands, the results are rather bleak. Only Tiger Beer (although it is owned by a Dutch company), Lazada and Zalora (Singapore but with German origins) made their way into the Top 100 most Liked Brands in Vietnam. This, of course, shows that much more work must be done in order to further integrate the ASEAN brand market.



**TIGER BEER AND LAZADA FROM SINGAPORE MADE THEIR WAY INTO THE TOP 100 MOST LIKED BRANDS IN VIETNAM.**

# COMPARATIVE ANALYSES

As the previous sections have shown, there are certainly differences among the ASEAN states in terms of brand preferences. Some are centered on local Homegrown brands, while others are more likely to focus on large international brands. Moreover, the categories also differ in importance between the countries. These differences are analyzed in this part of the report.

TABLE 1: DESCRIPTIVE STATISTICS

	Malaysia	Singapore	Indonesia	Thailand	Philippines	Vietnam
GDP (current US\$ in billions)	296.3	292.7	861.9	395.2	292.5	193.6
Income group (World Bank)	UM	H	LM	UM	LM	LM
Population Size (in millions)	30.3	5.5	262	67.9	100.7	91.7
Internet Access (%)	67.7	81.2	50.4	60.0	52	51.4
Facebook Users (%)	61.0	70.9	33.4	60.0	52	41.9
Threshold to Enter the Top 100 (2016)		74,961	1,054,116	660,667	1,462,870	499,349
Threshold to Enter the Top 100 (2015)	388,635	63,435	908,757	N/A	1,023,643	N/A
Growth in Thresholds	N/A	18.17	16.00	N/A	42.91	N/A
Minimum Likes Needed per 1,000 Facebook Users	21.03	19.22	12.05	16.22	27.94	13.00
Homegrown Brands (%)	35	28	31	58	42	68
International ASEAN Brands (%)	1	3	5	2	2	1
Other Asian Brands (%)	17	17	20	9	14	10
Global Brands (%)	47	52	44	31	42	21
Number of Other Countries	22	22	24	16	14	12

TABLE 2: SIZE OF CATEGORIES IN ASEAN-6

	Malaysia	Singapore	Indonesia	Thailand	Philippines	Vietnam
<b>Food</b>	17	21	17	18	19	6
Homegrown (%)	18%	24%	41%	44%	26%	33%
<b>Fashion</b>	27	23	15	12	21	29
Homegrown (%)	41%	13%	53%	50%	38%	86%
<b>Phones</b>	12	8	14	9	18	18
Homegrown (%)	42%	38%	36%	44%	67%	50%
<b>Fluids / Drinks</b>	10	9	10	13	8	13
Homegrown (%)	30%	11%	10%	38%	50%	38%
<b>Fuel</b>	8	1	3	2	2	4
Homegrown (%)	13%	0%	0%	50%	0%	25%
<b>Physique</b>	2	6	15	9	10	9
Homegrown (%)	0%	17%	13%	22%	20%	67%
<b>Finance</b>	5	5	0	9	3	1
Homegrown (%)	60%	60%	0%	89%	100%	100%
<b>Flying</b>	3	7	2	2	3	3
Homegrown (%)	67%	57%	50%	50%	67%	100%

These countries have a combined GDP of US\$2,332 billion, ranging from US\$193.6 billion in Vietnam to US\$861.9 billion in Indonesia. Using the World Bank categories, Indonesia, Vietnam and the Philippines are classified as lower-middle in terms of income. Malaysia and Thailand are considered upper-middle. Singapore is the only country that fits into the high-income category. The percentage of people with Internet access and people with a Facebook account is higher in countries with more income. The percentage of Internet access is 81.2% in Singapore, while only 52% in the Philippines, which is the highest of the countries in the lower middle-income class category. However, the differences are smaller regarding the use of Facebook. The highest scoring country in the lower middle-income class is Thailand, with 66%. This is similar to the

71% in Singapore. There is a downward outlier in Indonesia with 33.4%.

Continuing to the core of this report we now look at the differences in brand preferences. As noted previously, brands in the categories of Food, Phones and Fashion assume an important position in the portfolio of Preferred Brands. These categories will be separately covered below. After analyzing the three most important categories, we turn to the categories that are more country specific. In four of the ASEAN countries, Physique and Fluids came up as leading categories. Just behind them are Fuel and Finance, which appear prominently in two of the countries. These will also be considered.

## Food

The biggest food lovers are the Thai — 31% of the Top 100 brands are Food-related, followed closely by Singapore with 30%. More specifically, Western Fast-food brands are very popular. The number of Homegrown brands varies between 17% and 42%. International brands have managed to take a significant position in the food market. Malaysia and Singapore have relatively few Homegrown food brands, while Thailand has many. In Singapore this is due mostly to international chocolate, coffee and Fast-food brands. The large number in Malaysia is caused again by many Fast-food brands and two brands from Unilever as well as Nestlé. Interestingly, Singapore and Philippines share a common love for chocolate with four brands each, all of which are international. Vietnam and Thailand are fond of Fluids. In Thailand the Top 10 of all brands contains no less than four fizzy drinks. Within Vietnam the fizzy drinks are not that much liked but still make up half of this category. In the Philippines we see more tendency towards a more diverse brand portfolio. Coffee, beer, fizz and juice drinks are all part of the brands the Filipinos enjoy; people there also prefer the

coffee made by international brands (there are no local coffee brands on the list). Indonesia has three ASEAN brands in the Top 100.; Malaysia and Vietnam have one. Finally, there are no clear trends visible among Homegrown brands. It ranges from convenience stores in Indonesia to energy drinks in Malaysia and from seafood restaurants in Singapore to food reviews in Vietnam.

Concerning the market homogenization of the countries in the ASEAN region, it would be an understatement to say that there is not much crossover in the Food category. Only five ASEAN brand appearance occur in the Top100 of the six countries; Kratingdaeng ranking 27 and Red Bull ranking 58 from Thailand and Enervon-C, the Filipino food supplements ranking 100 in Indonesia. Red Bull is liked in Malaysia as well in place 56. The final ASEAN brand is Tiger Beer from Singapore in place 74. The international brands are mostly from the US, or are part of either Unilever or Nestlé. The lack of crossover is not caused by the lack of options. An obvious candidate for ASEAN integration would be Jollibee from the Philippines, a multinational Fast-food brand with branches in the US and China.

FIGURE 33: EATING AND TEXTING



## Phones

The previous section covered the food brands in the six ASEAN countries. Today, phones intersect with food in the sense that more and more people use their phones during mealtime. What are the phone brands they like to use? Here, we will dive into this question. The popularity of phones is more evenly distributed than with food. It ranges from eight to 18 brands in the Top 100. Singapore and Thailand liked Phone brands the least, where 11 and 13 brands are in the category. Phone brands are the most popular in Philippines and Indonesia, with 24 and 21, respectively. A potential cause for the differences between these preferences is the availability of good mobile network coverage. The amount of time that people have access to a 3G, or better, connection can be used as a metric to look at this. It appears that the better the connectivity in the country has, the less favored the Phone brands are. One explanation could be that in countries with lower connectivity there is a certain novelty to phones, boosting the overall likability. Again, it is also related to GDP per capita, which suggests that other factors are also at play.

TABLE 3: 3G CONNECTION VS. PHONE FANS

Rank	Country	3G+ connection (% of time)	Phone brands (% of total)	GDP per capita (x1000 USD)
12	Thailand	92.8	11	5.8
5	Singapore	94.4	13	53.2
57	Vietnam	82.2	16	2.1
41	Malaysia	86.2	17	11.2
56	Indonesia	82.2	21	3.3
84	Philippines	68.6	24	2.9

In terms of ASEAN integration with regard to the Phone category, there is not a single brand in the top 100 from another ASEAN country. However, the proximity of the brands is already closer with many Asian mobile hardware producers. In more developed regions, such as Europe, several large players control a substantial part of the market. Vodafone, T-Mobile and Orange have significant market shares in countries throughout Europe. An ASEAN consolidation in telecommunications could help the region achieve a deeper integration. With respect to the hardware market, the region still depends on more technologically advanced economies in Asia and it may be hard to compete in the market. Only the Philippines has several Homegrown hardware brands in its Top100.

FIGURE 34: A SPECTRUM OF PHONE FASHION



## Fashion

For years, phone cases have been used to protect your phone but increasingly, they are all about appearances. People in the ASEAN block do not only care about how their phone looks, but also very much about how they look. Fashion is the largest category with 128 brands, resulting in an average of 21 brands. The lowest number of fashion brands are in Thailand, with only 13 in their Top 100. The highest number is in Vietnam with 28 Fashion brands, so the category is on the minds of Vietnamese over 1/4 of the time they consider brands. The differences in the type of fashion people prefer is notable. In the Muslim countries, like Indonesia and Malaysia, many Muslim wear brands are found among the top Fashion brands. In Singapore, for example, luxury brands rule the list. The Thai and Vietnamese are focused on fashion specific to their own countries. Filipinos have a broad interest in fashion, ranging from fast-fashion to flip-flops and from sports to luxury. The penetration of international brands into fashion varies between the 14% and 78%. Vietnam relies heavily their own Homegrown brands for fashion trends, whereas Singapore is far more open to fashion trends from around the world, which is no surprise given the country's economic openness. The luxury brands in Singapore tend to come from France. The remaining international brands are mostly from the US and Germany. Even Asia is represented in the top Fashion brands of Singapore. In Indonesia and Malaysia, the Muslim wear brands are homegrown, whereas the sports brands are international. Germany has a substantial fashion impact in the lives of the people living in the ASEAN-6 region. Overall, local brands often specialize in local fashion and the share of international brands depends mostly on the popularity of this homegrown fashion. In this third installment of the ASEAN integration analysis, there are brand Likes from other ASEAN countries within the Fashion category. However, there is still no reason to cheer too loudly. Lazada Zalora, which were founded by a German company but is based in Singapore, managed to become one of the most liked brands in all countries. Finally, a Singaporean online fashion community, Clozette has a subsidiary in Indonesia. Most of these are not purely ASEAN brands. That being said, these brands could be the beginning of an integration of brand preferences in the region.

## Physique, Fuel and Finance

Physique is an extension of fashion where people also consider other aspects of their appearance, such as their hair and skin. Most of the physique brands focus on the female consumers. Within this category there is a clear division, namely between Vietnam, which has almost exclusively Homegrown brands and Indonesia and the Philippines where the brands are from the EU. ASEAN integration of brand preferences has not prevailed yet in this category. Both Malaysia and Indonesia have a bond with the Fuel category but they focus, however, on very different submarkets. In Indonesia the three brands are motorbikes, where two got a Top 10 ranking. In Malaysia the most liked brands are cars and one oil company. The international players control most of these markets. The Indonesian motorbikes are from Japan. In Malaysia the preferred brands are from Japan (4), Germany (2), Korea (1) and France (1). However, Malaysians have also saved a spot for the national oil company Petronas. Within this category, there are other ASEAN brands. Finally, with the Finance category, we find it in both Singapore and Thailand where a majority of the brands are financial institutions. Singapore is open to international brands — one half of the brands are foreign. Thailand, on the other hand, allows only one Malaysian bank into the Top 100. Thailand and Singapore both have a top liked Malaysian brand, boding well for ASEAN.

## ASEAN integration

In terms of ASEAN integration, the previous section shows that there is still a long road ahead. Overall, there are one to five brands from other ASEAN countries. Compare this to German companies, which have three to six most liked brands in each country. Given the proximity and size of the region, the lack of ASEAN brands is quite remarkable. Tiger Beer is the brand best liked within the ASEAN region with more than half the Likes from other ASEAN countries, translated to about one million ASEAN Likes. This phenomenon is probably not caused by a preference for Western brands. For instance, there are nine to 20 brands from non-ASEAN countries, which score particularly well in the Phones category. However, in the Food, Fashion, Physique and Fluids categories, Asian brands also fall behind both US and European brands.

## COMPANY ANALYSES

In certain categories, we find a strong presence of particular multinational brand owners. What is the strength of large multinational players? How strong is their presence on ASEAN-wide Social? The consideration of brand preferences at a firm level is quite interesting. Here, we will elaborate on the best performing firms and the battle of the big brands.



The Food and Physique categories are the most consolidated in the ASEAN block, meaning that there are several big players who control the market. In this section the number of times brands have a place in the Top100 among the six countries, including subsidiaries, is considered. In the Food category, Unilever and Nestlé share the first place with a total of 15 brands; Yum! Brands ranks as a close number three with 13 ranking appearances. Two brands in the food category managed to take a Top 100 position in all the six countries, namely KFC and Pizza, both part of Yum! Brands. The most obvious contender McDonalds fails to make the Top 100 list in Vietnam and Indonesia. McDonalds, Yum! Brands (again, KFC and Pizza Hut) and Restaurant Brands International (Burger King) face competition with each other all over the world, as well as in this region. Yum! Brands win easily here, followed by international Brands International and McDonalds who share second place (four brands). Other dominant forces are Coca-Cola and Pepsi. Concerning the everlasting battle between Coca-Cola and Pepsi in the Fluids category, there is only one clear winner — Coca-Cola finds a Top 100 qualification 11 times, while Pepsi manages to get only five. The Coca-Cola brand itself is most the powerful, but some subsidiary brands such as Minute Maid and Fanta also made it. Samsung wins in the Phone category with 12 positions. BBK Electronics and Huawei share second position with six brands. The global Samsung competition versus Apple battle is unheard of in the ASEAN region. Samsung is the most liked phone brand and Apple is represented only in Singapore, with iTunes and the App

store. Within the Fashion category, Nike has the most brands on the list with eight. However, Nike is not present in two of the countries whereas Adidas is in the top of all six countries. Therefore, Adidas wins the battle in this region. Alibaba Group (excluding food-related RedMart) follows with seven brands. Finally, the Physique category is controlled by Unilever, which holds 16 places on the list. Overall, Unilever appears 31 times in the Top 100 of the six countries. The largest contribution comes from Indonesia, where 13 Unilever brands are liked very much. These numbers make Unilever the largest player in the ASEAN market, not so closely followed by Yum! Brands (with 15 brands) and Nestlé (with 13).

FIGURE 35: OVERALL CHAMPIONS



# CONCLUSION:

## 435 > 269 > 12

In an economically fast growing region of 650 million consumers, and in a place where the group of 200 million digitized consumers is expanding at an even faster pace, it is worthwhile to examine which brands manage to win on Social. To the best of our knowledge, this report is the first of its kind to identify the ASEAN brands winning on Social and also provide insight into which brands are in the lead regarding the integration of the ASEAN economies.

In the Conclusion we return to the report's objectives.

### Objective 1: Identify which ASEAN Region Brands Win on Social

Of the 435 ASEAN region brands that lead on Social, we find seven brands that manage to get in the top position in all six ASEAN rankings: two are from Singapore / Germany — Zalora and Lazada; the five other brands are Adidas (Germany), Samsung (South Korea), Coca-Cola (US), KFC (US) and Pizza Hut (US). Of these 435 different brands, 62% are ASEAN Homegrown. Of those 269 brands, 30 are from Singapore, 33 Indonesia, 35 Malaysia, 45 Philippines, 58 Thailand and 68 Vietnamese brands. There are 167 brands, which are originally from outside the ASEAN region.

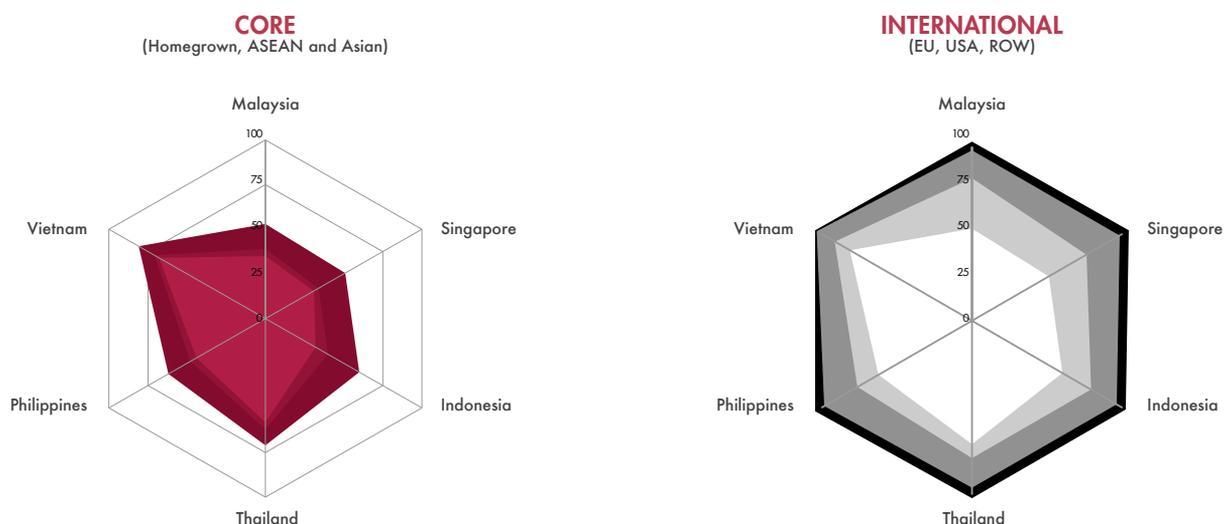
### Objective 2: Assess the Level of Market Homogenization with Regard to Category and Brand Preferences of ASEAN Consumers

Currently, ASEAN economies are very dependent on China, Japan, the EU and the US. These partners are responsible for 45% of all trade, while ASEAN intra-trade accounts for 24% of all trade. Furthermore, ASEAN has an openness of trade of 97%, which is much higher than the world average of 58%. One of the main objectives for the ASEAN agreement is to lower the dependence on other countries as it exposes ASEAN to the fluctuations of the other economies. A way for the ASEAN region to become less independent on others is to have its companies enter into each other's markets and successfully compete for preference among its ASEAN consumers. Hence, this report examines the two aspects of market homogenization: shared brand preferences and category prominence.

### Brand Preferences

Of the 435 brands that lead on Social in the ASEAN region, more than 62% are homegrown from one of the ASEAN countries. However, many of these brands are not popular on Social with other ASEAN consumers. Of those 269 brands, only 12 succeed on Social in ASEAN markets other than in their home market. The commonality in brand preferences comes mainly from international brands: other parts of Asia (40 brands), EU (56), US / Canada (59), and ROW (22). The radar graph below compares the countries on their core (homegrown, ASEAN and Asia) versus the international (EU, NAFTA, ROW) brands.

GRAPH 16: CORE VS. INTERNATIONAL BRAND PREFERENCE



As cited, only 12 ASEAN Homegrown brands succeed on Social in other ASEAN markets outside of their home base. The graph below lists those top-ranked brands in other ASEAN countries — three are originally from Malaysia, seven from Singapore, one from Thailand and one from the Philippines.

GRAPH 17: TOP RANKED BRANDS IN OTHER ASEAN COUNTRIES

Brand	Malaysia	Singapore	Indonesia	Thailand	Philippines	Vietnam	Number of ASEAN Host Markets
AirAsia	H	X		X	X		3
CIMB	H			X			1
XL Rame	H		X				1
Lazada	X	H	X	X	X	X	5
Zalora	X	H	X	X	X	X	5
METRO		H	X				1
Clozette		H	X				1
OCBC Bank	X	H					1
Wego		H	X				1
Tiger Beer		H				X	1
Red Bull*	X		X	H			2
Enervon-C			X		H		1
Reception of ASEAN brands	4	1	8	4	3	3	

Note: H = home market; x = present in Top 100, \*Krating Daeng is also liked in Indonesia but considered part of Red Bull

Interestingly, Thai's Red Bull with its dual country-of-origin, Austria, is also the world's third largest brand in terms of Likes. It has almost 43.5 million international Likes but the global brand was not able to secure a position in the Thai Top 100. Within ASEAN, the brand did achieve a Top 100 position in both Malaysia and Indonesia.

Overall, the vast majority of ASEAN Homegrown brands have not yet developed very well. Outside of the ASEAN region, international recognition is also in need of improving. Only nine brands have over one million Likes coming from outside the country of origin. Tiger Beer is a distant second to Red Bull with almost two million international Likes, mostly from the ASEAN region. Another Singaporean brand, Singapore Airlines, brings home more than 1.7 million international Likes; Indonesia has Pusat Gamis Terbaru with nearly 1.5 million Likes; AirAsia from Malaysia comes close to 1.2 million Likes. Vietjet from Vietnam is next with nearly 1.1 million international Likes. Completing the list are Singaporean brands Shangri-La Hotels and Resorts and Tigerair with just over 1 million international Likes. The Philippines does not have a brand with more than 1 million international Likes. With over 880,000 Likes, the best performing brand globally is Cebu Pacific Air.

### Category Prominence

Another measure for regional market homogenization is the degree to which countries share the prominence of product categories. The section on Comparative Analysis already provided details on the so-called 'F' categories in the Top 100. The three prime categories shared across the ASEAN-6 are: Food, Fashion and Phones, where in all countries, these categories have more than 10 brands each of the Top 100. Fashion is particularly strong in Malaysia, Singapore, Philippines and Vietnam. And Food is the number one category in Indonesia and Thailand.

The level of market homogenization has visible limits marked by the categories unique to certain ASEAN countries. For instance, Malaysians are really concerned with value buying, or *Fasih Ekonomi*. This is illustrated by the large presence of brands, which are aimed at 'getting the most bang for your buck.' Singapore, by far the smallest and most affluent country in the ASEAN block, has the unique category of Flying with six brands plus its own Singapore Airlines, which makes it a very prominent category.

For Indonesia, the most prominent category is Physique; yet, interestingly within the category, only a few Homegrown brands are present in the Top 100, as opposed to the brands in their Food and Fashion categories, in which Indonesians prefer their own brands.

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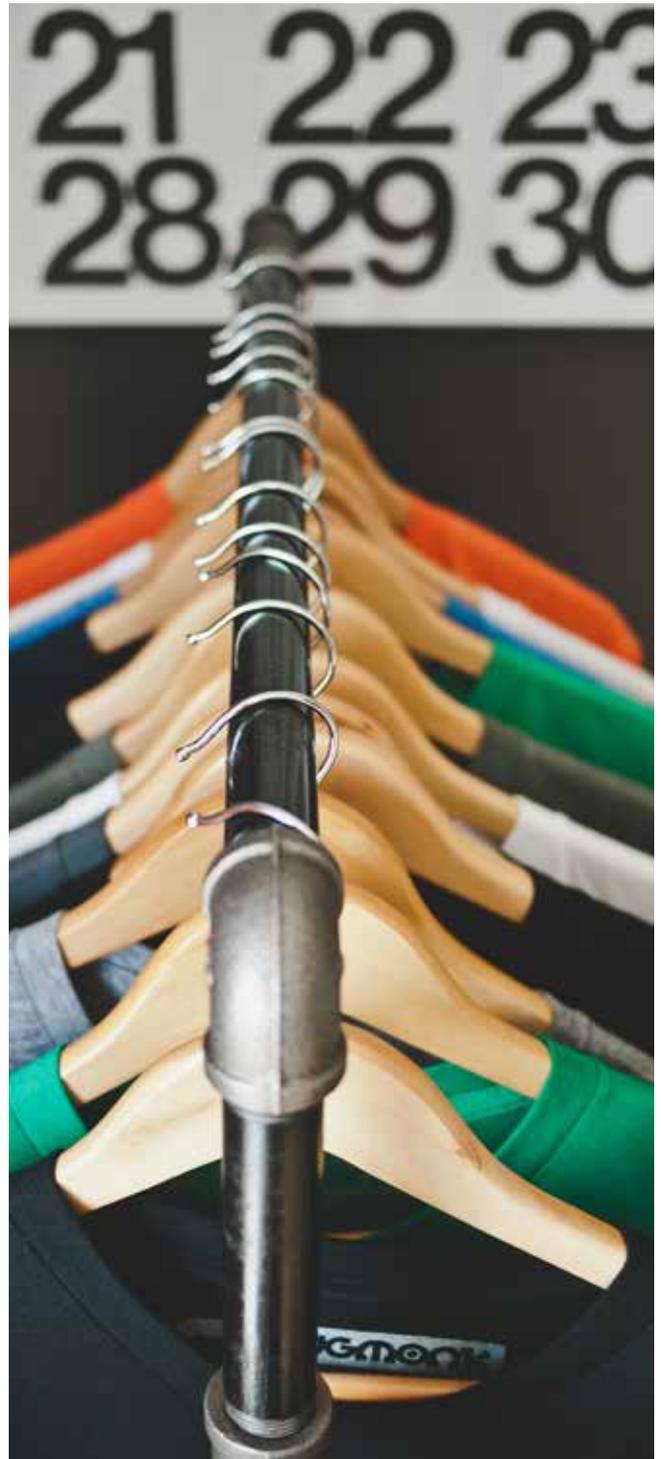
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# APPENDICES

## MALAYSIA

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	Oh! Media	2,247,208	News	Malaysia	Oh! Media
2	McDonald's	2,217,360	Food Service	USA	McDonald's
3	KFC	2,147,433	Food Service	USA	Yum! Brands
4	AirAsia	1,870,604	Flying	Malaysia	Tune Group
5	Mudah.my	1,708,73	Online Marketplace	Malaysia	Mudah.my
6	Digi	1,572,111	Phones / Telecom	Malaysia	Telenor / Government of Norway
7	Pizza Hut	1,485,972	Food Service	USA	Yum! Brands
8	Lazada	1,451,097	Fashion Online	Germany/Singapore	Alibaba
9	Samsung Mobile	1,338,015	Phones / Telecom	South Korea	Samsung
10	U Mobile	1,274,591	Phones / Telecom	Malaysia	U Mobile
11	CIMB Malaysia	1,237,046	Financial Services	Malaysia	CIMB / Khazanah Nasional
12	Maybank	1,181,104	Financial Services	Malaysia	Maybank / Permodalan Nasional Berhad
13	Samsung Mobile Malaysia	1,150,905	Phones	South Korea	Samsung
14	Sony Mobile	1,084,878	Phones	Japan	Sony
15	Adidas	1,084,372	Fashion Sports	Germany	Adidas
16	Burger King Malaysia	1,047,719	Food Service	USA	Restaurant Brands International
17	MILO Malaysia	1,037,027	Drinks/Chocolate	Australia	Nestlé
18	ZALORA	1,028,878	Fashion Online	Germany/Singapore	Zalora Group
19	Nikon	1,028,835	Consumer Electronics	Japan	Nikon
20	Malaysia Airlines	1,027,325	Flying	Malaysia	Malaysia Airlines / Khazanah Nasional Berhad
21	FAREEDA.Nyata Jelita	1,024,837	Fashion Online	Malaysia	FAREEDA
22	Tudung Aidijuma – Cetusan Idea Datin Norjuma	991,044	Fashion Online	Malaysia	Colors Addiction Sdn Bhd (M)

## APPENDICES

### MALAYSIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
23	PETRONAS Brands	975,012	Fuel	Malaysia	PETRONAS Brands / Malaysian Government
24	Nike Football	966,679	Fashion Sports	US	Nike, Inc.
25	KitKat	947,753	Food / Chocolate	Switzerland	Nestlé
26	Honda Malaysia	929,068	Fuel / Automobiles	Japan	Honda
27	Maxis	876,414	Phones / Telecom	Malaysia	Electronic Arts
28	Nescafé On The Go	873,141	Drinks / Coffee	Switzerland	Nestlé
29	BlackBerry	836,753	Phones / Telecom	Canada	BlackBerry Limited
30	KLM	826,160	Flying	Netherlands	Air France – KLM
31	IKEA Malaysia	784,309	Furniture	Sweden	IKEA
32	Converse	777,389	Fashion shoes	US	Nike, Inc.
33	Burberry	772,702	Fashion luxury	UK	Burberry
34	MYSALE	757,202	Fashion Online	New Zealand	The MySale Group
35	Starbucks	734,246	Drinks / Coffee	US	Starbucks
36	7-Eleven Malaysia	733,097	Food / Retail	Japan	Seven & i Holdings Co., Ltd.
37	www.ipmart.com	716,969	Online Retail	Malaysia	Extreme Broadband
38	Sally Fashion	714,590	Fashion	Malaysia	Sally Fashion
39	Nestlé Drumstick Malaysia	709,132	Food / Ice cream	Switzerland	Nestlé
40	Anugerah	670,786	Islamic Lifestyle	Malaysia	Anugerah
41	Toyota Malaysia	640,040	Fuel / Automobiles	Japan	Toyota
42	Mi Sedaap Malaysia	637,156	Food	Malaysia	Gentle Supreme Sdn Bhd
43	Groupon	626,692	Deals	USA	Groupon
44	PlayStation	616,778	Consumer Electronics	Japan	Sony
45	MAGGI Malaysia	616,283	Food	Switzerland	Nestlé
46	KIA MALAYSIA	612,561	Fuel / Automobiles	Korea	Hyundai Motor Group
47	Radiusite	609,319	Fashion Online	Malaysia	Radiusite
48	Baskin-Robbins	608,894	Food Service	USA	Dunkin' Brands
49	Google Chrome	597,191	Internet	USA	Alphabet Inc.

## APPENDICES

### MALAYSIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
50	Big Apple Donuts & Coffee	581,880	Drinks / Coffee	Malaysia	Big Apple Interasia Sdn Bhd
51	Tokyo Otaku Mode	579,375	Fashion / Japanese Pop Culture	Japan	Tokyo Otaku Mode Inc.
52	Watsons Malaysia	578,938	Physique	Hong Kong	A.S. Watson Group / CK Hutchison Holdings
53	Gucci	577,121	Fashion/Luxury	Italy	Kering
54	Burger Bakar Abang Burn	576,753	Food Service	Malaysia	Burger Bakar Abang Burn
55	Domino's Pizza Malaysia	570,989	Food Service	US	Domino's Pizza Inc.
56	Red Bull	570,907	Drinks / Fluids	Austria / Thailand	Red Bull GmbH
57	Hotlink	564,632	Phones / Telecom	Malaysia	Maxis Communications/Usaha TEGAS
58	Xpax	563,837	Phones / Telecom	Malaysia	Axiata Group / Khazanah Nasional Berhad
59	QQ Baby Shop	562,270	Fashion Online Baby	Malaysia	QQ Baby Shop
60	Magnum	493,659	Food / Ice cream	UK / Netherlands	Unilever
61	Sushi King	487,658	Food Service	Malaysia	Sushi King
62	Movida Kitchen Bar & Club Lounge	485,433	Entertainment	Malaysia	Movida Kitchen, Bar & Club Lounge
63	Nike	483,095	Fashion / Sports	USA	Nike, Inc.
64	XForex	480,812	Financial Services	Cyprus	Xtrade International Ltd.
65	Ferrero Rocher	473,522	Food / Chocolate	Italy	Ferrero SpA
66	BMW	471,759	Fuel Automobiles	Germany	BMW
67	Galeri Arian	468,848	Fashion / Online	Malaysia	ARIANI
68	Adidas Originals	468,722	Fashion / Sports	Germany	adidas
69	Louis Vuitton	467,050	Fashion / Luxury	France	LVMH
70	Al-Humaira' Contemporary	466,741	Fashion Online	Malaysia	ALHUMAIRA
71	PUMA	466,124	Fashion / Sports	Italy	Kering
72	LuvCornetto	463,584	Food / Ice cream	UK / Netherlands	Unilever
73	Revive	462,874	Drinks / Sports	Malaysia	PepsiCo
74	Sony Mobile MY	460,090	Phones	Japan	Sony
75	Sunsilk	458,184	Physique	UK / Netherlands	Unilever

## APPENDICES

### MALAYSIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
76	PEUGEOT MALAYSIA	456,050	Fuel / Automobiles	France	Groupe PSA
77	GEMPAK STARZ	454,422	Entertainment Online	Malaysia	Gempak Starz
78	Qaira Hijab	453,632	Fashion Online	Malaysia	Qaira
79	RHB Group	452,419	Financial Services	Malaysia	RHB Bank / Employees Provident Fund
80	Nissan	451,777	Fuel / Automobiles	Japan	Nissan / Renault
81	H&M	449,275	Fashion	Sweden	H&M
82	Guinness	447,789	Drinks / Beer	Ireland	Diageo
83	Volkswagen Malaysia	447,070	Fuel / Automobiles	Germany	Volkswagen
84	Windows	446,600	Software	US	Microsoft
85	HTC Malaysia	445,796	Phones	Taiwan	HTC
86	Skype	443,313	Software	Estonia	Microsoft
87	Tesco Malaysia	441,903	Food Retail	UK	Tesco
88	Ray-Ban	441,634	Fashion / Accessoires	US	Luxottica
89	OPPO Malaysia	439,918	Phones / Telecom	China	BBK Electronics
90	Asus Malaysia	439,650	Consumer Electronics	Taiwan	Asus
91	Coca-Cola	437,511	Drinks / Fluids	USA	Coca-Cola Company
92	100PLUS Malaysia	435,789	Drinks / Fluids	Malaysia	ThaiBev
93	Heineken	433,423	Drinks / Beer	Netherlands	Heineken
94	Ice-Watch	429,482	Fashion / Accessoires	Belgium	Ice-Watch
95	SweetMuslimah.com	428,316	Fashion Online	Malaysia	SM RICH MARKETING Sdn Bhd
96	Jawatan kosong	422,608	Recruitment	Malaysia	JawatanKerjaan.com, Inc.
97	Mos Fashion & Beauty	399,543	Fashion Online	Malaysia	Nexgan Sdn Bhd
98	Padini Holdings	391,707	Fashion	Malaysia	Padini Holdings
99	Samsung Camera	390,549	Consumer Electronics	Korea	Samsung
100	OCBC Bank	388,635	Financial Services	Singapore	OCBC Bank

## APPENDICES

### SINGAPORE

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	McDonald's	363,102	Food Service	US	McDonald's
2	Samsung Mobile	326,729	Phones	Korea	Samsung
3	FlyScoot	311,289	Flying / Airlines	Singapore	Singapore Airlines / Temasek
4	Singtel	262,701	Phones / Telecom	Singapore	Singtel / Temasek
5	Singapore Airlines	262,028	Flying / Airlines	Singapore	Singapore Airlines / Temasek
6	KFC	261,632	Food Service	US	Yum! Brands
7	Starbucks Singapore	257,260	Drinks / Coffee	US	Starbucks
8	Qoo10 Singapore	253,822	Online marketplace	Singapore	Ebay
9	Subway Singapore	241,237	Food Service	US	Doctor's Associates, Inc.
10	Watsons Singapore	224,541	Physique	Hong Kong	A.S. Watson Group
11	StarHub	216,877	Phones / Telecom	Singapore	StarHub
12	Starbucks	200,707	Drinks / Coffee	US	Starbucks
13	H&M	199,825	Fashion	Sweden	H&M
14	MIL0 Singapore	195,501	Drinks / Chocolate	Switzerland	Nestlè
15	NTUC FairPrice	174,636	Food Retail	Singapore	NTUC
16	IKEA Singapore	174,233	Furniture	Sweden	IKEA
17	Tigerair	174,058	Flying / Airlines	Singapore	Singapore Airlines / Temasek
18	Groupon	172,725	Deals	USA	Groupon
19	Pizza Hut	170,185	Food Service	USA	Yum! Brands
20	Burberry	167,536	Fashion / Luxury	UK	Burberry
21	Heineken	164,933	Drinks / Beer	Netherlands	Heineken
22	ZALORA	159,061	Fashion	Germany / Singapore	Zalora Group
23	Courts SG	156,191	Consumer Electronics	UK	Courts PLC
24	Samsung Mobile Singapore	152,729	Phones	Korea	Samsung
25	Coca-Cola	151,991	Drinks / Fluids	US	Coca-Cola Company
26	Burger King Singapore	148,210	Food Retail	US	Restaurant Brands International

## APPENDICES

### SINGAPORE (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
27	OCBC Bank	147,952	Financial Services	Singapore	OCBC Bank
28	DEAL.com.sg – Singapore at Half the Price!	140,383	Deals	Singapore	Ensogo
29	G2000 Singapore	139,915	Fashion	Hong Kong	G2000
30	adidas	133,616	Fashion / Sports	Germany	adidas
31	Ben & Jerry's	125,491	Food / Ice cream	US	Unilever
32	UNIQLO Singapore	121,990	Fashion	Japan	Fast Retailing
33	Reebonz	120,994	Fashion / Deals	Singapore	Reebonz
34	Ferrero Rocher	117,501	Food / Chocolate	Italy	Ferrero SpA
35	Canon Singapore	117,055	Consumer Electronics	Japan	Canon Inc.
36	M1	115,875	Phones / Telecom	Singapore	M1
37	Subway	112,360	Food Service	US	Doctor's Associates, Inc.
38	The Coffee Bean & Tea Leaf® – Singapore	111,059	Drinks / Coffee	US	International Coffee & Tea, LLC
39	DBS Bank. Living, Breathing Asia	106,353	Financial Services	Singapore	DBS Bank
40	Tiger Beer	105,909	Drinks / Beer	Singapore / Netherlands	Heineken
41	Louis Vuitton	105,813	Fashion / Luxury	France	LVMH
42	Lazada	103,738	Fashion Online	Germany / Singapore	Alibaba
43	POSB	101,412	Financial Services	Singapore	DBS Bank
44	Sticky Singapore	98,684	Food	Singapore	Sticky
45	Jetstar Asia	98,542	Flying / Airlines	Australia	Qantas
46	PAssion Card	97,345	Deals	Singapore	Ministry of Youth
47	Long John Silver's Singapore	96,171	Food	Australia	Yum! Brands
48	Puma	95,090	Fashion / Sports	Germany	Kering
49	CHANEL	94,605	Fashion / Luxury	France	Chanel
50	HTC Singapore	94,588	Phones	Taiwan	HTC
51	KitKat	94,289	Food / Chocolate	Switzerland	Nestlé
52	7-Eleven Singapore	93,645	Food / Convenience store	Japan	Seven & i Holdings Co.

## APPENDICES

### SINGAPORE (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
53	iTunes	93,436	Music	USA	Apple
54	Samsung Singapore	92,738	Phones / Consumer Electronics	Korea	Samsung
55	Singapore Workforce Development Agency (WDA)	92,254	Government	Singapore	Ministry of Manpower
56	Kinder Bueno	92,049	Food / Chocolate	Italy	Ferrero SpA
57	NESCAFÉ	91,486	Drinks / Coffee	Switzerland	Nestlé
58	AirAsiaSingapore	90,839	Flying / Airlines	Malaysia	Tune Group
59	Go.BestDenki Singapore	88,794	Consumer Electronics	Japan	Yamada Denki Co Ltd
60	Forever 21	87,829	Fashion	US	Forever 21
61	TANGS	86,038	Online retailer	Singapore	Tangs
62	The Body Shop Singapore	86,006	Physique	UK	L'Oréal
63	Gucci	85,581	Fashion / Luxury	Italy	Kering
64	Mr Bean Singapore	85,364	Food	Singapore	Super Bean International
65	Cotton On	84,481	Fashion	Australia	Cotton On
66	Mi Singapore	83,760	Phones	China	Xiaomi
67	AirAsia	83,230	Flying / Airlines	Malaysia	Tune Group
68	Rolex	83,109	Fashion / Luxury	Switzerland	Rolex
69	Popeyes Louisiana Kitchen	83,024	Food	US	Restaurant Brands International
70	Nike Football	81,643	Fashion/Sports	US	Nike
71	The Manhattan FISH MARKET Singapore	80,952	Food	Singapore	The Manhattan FISH MARKET
72	Audi Singapore	80,508	Fuel / Automobiles	Germany	Volkswagen Group
73	Magnum	79,985	Food / Ice cream	UK / Netherlands	Unilever
74	Cadbury Dairy Milk	79,783	Food / Chocolate	UK	Unilever
75	LEGO	79,058	Toys	Denmark	The Lego Group
76	F3 Singapore (now dba wt+)	78,915	Fashion	India	F3Fashion
77	Tiffany & Co.	78,765	Fashion / Jewellery	US	Tiffany & Co.
78	Citibank Singapore	76,748	Financial Services	US	Citibank

## APPENDICES

### SINGAPORE (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
79	RedMart	75,332	Food / Online Supermarket	Singapore	Alibaba
80	SK-II Singapore	74,951	Physique	Japan	Procter & Gamble
81	Prestige Global Designs	73,255	Furniture	Singapore	Prestige Global Designs Pte Ltd
82	Skittles	71,913	Food	UK	Mars, Incorporated
83	ZUJI Singapore	71,585	Flying / Deals	Singapore	Webjet
84	Hada Labo (sg)	70,269	Physique	Japan	Rohto Pharmaceutical
85	Fox Fashion (Singapore)	69,975	Fashion	Israel	Fox
86	Razer	68,869	Consumer Electronics	US	Razer Inc.
87	MasterCard	68,567	Financial Services / CC	US	Mastercard
88	SEPHORA SINGAPORE	68,422	Physique	US	LVMH
89	Shangri-La Hotels and Resorts	67,908	Hotels	Singapore	Shangri-La
90	Nikon	67,756	Consumer Electronics	Japan	Nikon
91	SAFRA	66,309	Entertainment	Singapore	Ministry of Defence (MINDEF)
92	Guinness	65,684	Drinks / Beer	Ireland	Diageo
93	EA Games – Asia Pacific	65,619	Entertainment	Japan	Electronic Arts
94	Guardian Health & Beauty	65,281	Physique	Singapore	Dairy Farm International
95	Cartier	64,930	Fashion / Luxury	France	Richemont
96	Mango	64,496	Fashion	Spain	Mango
97	Metro (Singapore)	64,359	Online retailer	Indonesia / Singapore	Metro Holdings Limited
98	Lee Hwa Jewellery	63,986	Fashion / Luxury	Singapore	Aspial Corporation
99	App Store	63,549	Entertainment	US	Apple
100	Saturday Club	63,435	Fashion	Singapore	Saturday Club

## APPENDICES

### INDONESIA

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	OLX Indonesia	7,829,808	Online Marketplace	South Africa	Naspers
2	Batik Indonesia	5,102,561	Fashion Online	Indonesia	Technique, not a brand
3	Welovehonda Indonesia	4,841,507	Fuel / Motorcycles	Japan	Honda
4	XL RAME	4,837,243	Phones / Telecom	Malaysia	Axiata Group / Khazanah Nasional
5	Yamaha Motor Indonesia	4,420,566	Fuel / Motorcycles	Japan	Yamaha Corporation
6	BlackBerry	4,418,177	Phones	Canada	BlackBerry Limited
7	Tokyo Otaku Mode	4,076,052	Fashion / Japanese Pop culture	Japan	Tokyo Otaku Mode Inc.
8	Lazada	3,613,979	Fashion Online	Germany / Singapore	Alibaba Group
9	Telkomsel	3,368,007	Phones / Telecom	Indonesia	Telkom Indonesia / Ministry of State Owned Enterprises
10	CLEAR	3,119,543	Physique	UK / Netherlands	Unilever
11	Surfer Girl	2,879,703	Fashion / Sports	Indonesia	Surfer Girl International Pty Ltd
12	Smartfren	2,853,456	Phones / Telecom	Indonesia	PT Smartfren Telecom, Tbk / Sinar Mas Group
13	Axe ID	2,651,310	Physique	UK / Netherlands	Unilever
14	POND'S	2,594,193	Physique	UK / Netherlands	Unilever
15	Samsung Mobile Indonesia	2,443,664	Phones	South Korea	Samsung
16	ASUS	2,381,019	Consumer Electronics	Taiwan	ASUS
17	Indomie	2,272,435	Food	Indonesia	Indofood
18	Coca-Cola	2,272,382	Drinks / Fluids	US	Coca-Cola Company
19	Sale Stock	2,259,099	Fashion Online	Indonesia	Sale Stock
20	Blibli.com	2,146,424	Online Shopping	Indonesia	Blibli.com
21	Clozette Indonesia	2,137,873	Fashion community / Physique	Singapore	Clozette
22	Sunsilk	2,135,404	Physique	UK / Netherlands	Unilever
23	OPPO	2,129,533	Phones	China	BBK Electronics
24	Bir Bintang	2,121,814	Drinks / Beer	Indonesia	Heineken
25	Sehat AQUA	2,104,945	Drinks / Water	France	Danone
26	Mobogenie	2,045,840	Software	China	Mobogenie

## APPENDICES

### INDONESIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
27	Kratingdaeng Indonesia	2,034,339	Drinks / Fluids	Thailand	Red Bull GmbH
28	IM3 Ooredoo	2,028,928	Phones / Telecom	Indonesia	Ooredoo
29	Nike Football	2,026,719	Fashion / Sports	USA	Nike
30	Rumah Cantik Citra	2,024,817	Physique	UK / Netherlands	Unilever
31	Kotex Dunia Cewe	2,007,648	Physique	US	Kimberly-Clark
32	Tango Wafer Renyah	2,005,907	Food	Indonesia	OT
33	Dapur Umami	1,903,884	Food	Japan	Ajinomoto
34	Lollita Shoes Shop's	1,880,751	Fashion	Indonesia	Lollita Shoes Shop's
35	Natur-E Journey to Beauty	1,838,760	Physique	Indonesia	Blue Sphere Singapore Pte. Ltd.
36	Moshaict	1,763,890	Fashion	Indonesia	Moshaict
37	Tokopedia	1,752,720	Online Marketplace	Indonesia	Tokopedia
38	Intel Indonesia	1,743,579	Consumer Electronics	US	Intel
39	Samsung Camera	1,729,205	Consumer Electronics	South Korea	Samsung
40	Garuda Indonesia	1,675,444	Flying	Indonesia	Garuda Indonesia / Indonesian Ministry of State Owned Enterprises
41	Acer Indonesia	1,657,671	Consumer Electronics	Taiwan	Acer
42	Wardah Cosmetics	1,648,379	Physique	Indonesia	Wardah Cosmetics
43	Pizza Hut Indonesia (Official)	1,643,710	Food Service	US	Yum! Brands
44	Royco Masak Apa Hari Ini	1,637,833	Food	Indonesia	Unilever
45	Knorr	1,637,782	Food	UK / Netherlands	Unilever
46	Bukalapak	1,632,990	Online Marketplace	Indonesia	Bukalapak
47	Cornetto	1,618,379	Food / Ice cream	UK / Netherlands	Unilever
48	Ice Cream of Love	1,618,278	Food / Ice cream	UK / Netherlands	Unilever
49	Opera	1,615,180	Software	Norway	Opera Software / Golden Brick Capital Private Equity Fund I L.P.
50	Chocolatos	1,602,655	Drinks / Chocolate	Indonesia	Tudung Group
51	Tupperware Indonesia	1,576,471	Household	US	Tupperware Brands
52	Carrefour Indonesia	1,570,977	Food Retail	France	Carrefour

## APPENDICES

### INDONESIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
53	Firefox	1,514,427	Software	US	Mozilla
54	MatahariMall.com	1,487,315	Online Shopping	Indonesia	Lippo Group
55	Indomaret	1,465,601	Food Retail	Indonesia	Salim Group
56	Mizone 100 %	1,446,991	Drinks / Water	France	Danone
57	Garnier	1,412,644	Physique	France	L'Oréal
58	Cussons Baby Indonesia	1,392,845	Physique	Sierra Leone	Cussons Baby
59	Kalbe Family	1,392,505	Food / Baby Nutrition	Indonesia	Kalbe Farma
60	Strawberrynet, Indonesia	1,377,634	Physique	Romania	Strawberry Ltd.
61	Huawei Mobile	1,363,433	Phones	China	Huawei
62	UC Browser	1,363,255	Software	China	Alibaba Group
63	Kartu As	1,327,351	Phones / Telecom	Indonesia	Telkom Indonesia / Ministry of State Owned Enterprises
64	Microsoft Lumia	1,305,504	Phones	US	Microsoft
65	Alfamart	1,303,412	Food Retail	Indonesia	Alfamart
66	ToyotalD	1,298,429	Fuel	Japan	Toyota
67	Google Chrome	1,294,637	Software	US	Alphabet Inc.
68	Red Bull	1,279,111	Drinks / Fluids	Austria / Thailand	Red Bull GmbH
69	KFC	1,272,365	Food Service	US	Yum! Brands
70	adidas	1,269,995	Fashion / Sports	Germany	adidas
71	Guinness	1,253,801	Drinks / Beer	Ireland	Diageo
72	ZALORA	1,249,558	Fashion Online	Germany / Singapore	Zalora Group
73	Gmarket Global	1,236,644	Online Shopping	South Korea	eBay
74	Frestea	1,211,062	Drinks / Soda	US	Coca-Cola Company
75	CK Bandana	1,203,824	Fashion Online	Indonesia	CK Bandana
76	IbudanAku	1,203,087	Children website	Indonesia	Anugerah Group
77	Barbie	1,188,652	Toys	US	Mattel
78	Pantene Indonesia	1,185,349	Physique	Switzerland	Procter & Gamble
79	Sophie Paris	1,178,629	Fashion / Online	France	Sophie Paris

## APPENDICES

### INDONESIA (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
80	Samsung TV	1,163,800	Consumer Electronics	South Korea	Samsung
81	Rexona	1,159,111	Physique	UK / Netherlands	Unilever
82	Bango Warisan Kuliner	1,147,367	Food	Indonesia	Unilever
83	Durex Indonesia	1,145,798	Physique	UK	Reckitt Benckiser
84	Smadav	1,145,729	Software	Indonesia	Smadav
85	Himax Indonesia	1,135,211	Consumer Electronics	Taiwan	Himax
86	Big Cola	1,124,178	Drinks / Fluids	Peru	Aje Group
87	Lenovo Indonesia	1,123,149	Phones	China	Lenovo
88	Magnum	1,119,421	Food / Ice cream	Belgium	Unilever
89	OTOY	1,117,729	Electronics	US	OTOY
90	LG Electronics Indonesia	1,115,705	Phones	South Korea	LG
91	HTC Indonesia	1,100,065	Phones	Taiwan	HTC
92	Qatar Airways	1,099,853	Flying	Qatar	Qatar Airways / Government of Qatar
93	CFC Indonesia	1,096,741	Food Service	US	PT Pioneerindo Gourmet International Tbk
94	Minute Maid Pulpy Indonesia	1,083,835	Drinks / Juice	US	Coca-Cola Company
95	BRODO Footwear	1,075,876	Fashion	Indonesia	BRODO
96	simPATI	1,074,042	Phones / Telecom	Indonesia	Telkom Indonesia / Ministry of State Owned Enterprises
97	Pepsodent	1,064,872	Physique	US	Unilever
98	Pusat Gamis Terbaru	1,064,681	Fashion	Indonesia	ALIYAHWACHID
99	Wego	1,055,748	Travel Online	Singapore	Wego.com
100	Enveron-C	1,054,116	Food supplements	Philippines	Unilab

## APPENDICES

### THAILAND

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	Samsung Mobile Thailand	4,684,070	Phones	South Korea	Samsung
2	Oishi Drink Station	3,617,726	Drinks / Soda	Thailand	ThaiBev
3	ICHITAN	3,580,950	Drinks / Soda	Thailand	ICHITAN GROUP Public Company Limited
4	KFC	3,078,650	Food Service	US	Yum! Brands
5	SCB Thailand	3,020,206	Financial Services	Thailand	Siam Commercial Bank / Crown Property Bureau
6	Lazada	2,997,817	Fashion Online	Germany / Singapore	Alibaba Group
7	Tesco Lotus – เทสโก้ โลตัส	2,967,327	Food Retail	Thailand	Tesco
8	Coca-Cola	2,822,860	Drinks / Fluids	US	Coca-Cola Company
9	Pepsithai	2,621,834	Drinks / Fluids	US	PepsiCo
10	AIS	2,493,486	Phones / Telecom	Thailand	Intouch Holdings
11	KUTE CLUB	2,324,404	Physique	China	KUTE CLUB
12	iTrueMart	2,213,709	Online Shopping	Thailand	Charoen Pokphand
13	WeLoveShopping	2,114,037	Online Marketplace	Thailand	WeLoveShopping
14	dtac	2,040,352	Phones / Telecom	Thailand	Telenor / Government of Norway
15	คลับ อีทีพีคลับ (tknclub.com)	1,993,986	Food	Thailand	Taokaenoi Food & Marketing
16	Chilindo	1,959,554	Online Retail / Deals	Thailand	Chilindo
17	7-Eleven Thailand	1,923,877	Food Retail	Japan	Seven & i Holdings Co.
18	KBank Live	1,885,623	Financial Services	Thailand	Kasikornbank
19	SILKSPAN	1,776,480	Financial Services / Deals	Thailand	Silkspan
20	Kaidee.com	1,736,280	Online Marketplace	Thailand	DM Market Place Co., Ltd.
21	Watsons Thailand	1,691,180	Physique	Hong Kong	A.S. Watson Group / CK Hutchison Holdings
22	TrueMoney	1,636,466	Financial Services / eWallet	Thailand	Charoen Pokphand
23	adidas	1,607,177	Fashion / Sports	Germany	adidas
24	SCG Brand	1,579,168	Construction / Community	Thailand	Siam Cement / Crown Property Bureau
25	Panicloset	1,570,345	Fashion	Thailand	Panicloset
26	DIARIEZ	1,549,818	Fashion / Shoes	Thailand	DIARIEZ

## APPENDICES

### THAILAND (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
27	TrueYou	1,518,841	Deals	Thailand	True Corporation / Charoen Pokphand Group
28	McDonald's	1,494,150	Food Service	US	McDonald's
29	OPPO Thailand	1,365,499	Phones	China	BBK Electronics
30	Oriental Princess Society	1,355,885	Physique	Thailand	OP Natural Products Co.
31	SlyQ	1,350,524	Fashion	Thailand	SlyQ
32	EDTguide.com	1,306,034	Travel Blog	Thailand	EDTguide.com
33	AirAsiaThailand	1,300,627	Flying	Malaysia	Tune Group
34	homenayoo.fc	1,292,575	Online Marketplace / Homes	Thailand	Homenayoo
35	TrueMove H	1,292,178	Phones / Telecom	Thailand	True Corporation / Charoen Pokphand Group
36	Chillpainai	1,262,716	Travel Blog	Thailand	Chill Media
37	KTB Care	1,176,699	Financial Services	Thailand	Krung Thai Bank / Bank of Thailand
38	TrueVisions	1,168,388	Television	Thailand	True Corporation / Charoen Pokphand Group
39	Lenso Wheels (เลนส์ 3a)	1,153,255	Fuel / Car	Thailand	Lenso Wheel Co., Ltd
40	SizzlerThai	1,133,469	Food Service	Thailand	SLRT Limited
41	Dairy Queen Thailand	1,107,439	Food Service	US	Dairy Queen / Berkshire Hathaway
42	Johnnie Walker	1,065,774	Drinks / Liquor	Scotland	Diageo
43	ZALORA	1,063,329	Fashion Online	Germany / Singapore	ZALORA Group
44	Krungsri Simple	1,056,869	Financial Services	Thailand	Mitsubishi UFJ Financial Group
45	Love Andaman	1,046,261	Travel agency / Eco	Thailand	Love Andaman
46	Ensogo	1,028,077	E-Commerce / Deals	Australia	Ensogo
47	ทองคำ (goldtraders.or.th)	1,019,125	Financial Services	Thailand	Gold Trade Association
48	UNIQLO Thailand	1,004,766	Fashion	Japan	Fast Retailing
49	FA2-Shop	992,729	Fashion Online	US	FA2-Shop
50	Oishi News Station	982,619	Drinks / Soda	Thailand	ThaiBev
51	Thailand Mobile EXPO	978,788	Phones	Thailand	Thailand Mobile EXPO
52	Magnum	973,052	Food/Ice Cream	Belgium	Unilever

## APPENDICES

### THAILAND (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
53	LaysThailand	959,578	Food	US	PepsiCo
54	Starbucks Thailand	956,406	Drinks / Coffee	US	Starbucks
55	Striptap	944,766	Fashion Online	Thailand	Striptap
56	banidea.com	927,194	Interior Community	Thailand	banidea.com
57	Burger King Thailand	926,626	Food Service	US	Restaurant Brands International / 3G Capital
58	JOBTOPGUN	910,386	Recruitment	Thailand	Topgun Co., Ltd
59	Ai Japanese Village	906,208	Food Service	Thailand	Ai Japanese Village
60	BlackBerry	900,560	Phones	Canada	BlackBerry Limited
61	Pizza Hut	879,469	Food Service	US	Yum! Brands
62	Chang World	872,590	Drinks / Beer	Thailand	ThaiBev
63	ไทยทีวทไทย ( <a href="http://www.thaiteawthaiplaza.com/">http://www.thaiteawthaiplaza.com/</a> )	869,240	Entertainment	Thailand	PK Exhibition Management Co., Ltd.
64	BigCBigService	861,959	Food	Thailand	Big C / T.C.C Group
65	Big Cola	859,860	Drinks / Fluids	Peru	Ajegrup
66	CIMB Thai	854,721	Financial Services	Malaysia	CIMB / Khazanah Nasional Berhad
67	BabyLove	847,090	Physique	Australia	DSG International Ltd.
68	Sunsilk	837,611	Physique	UK / Netherlands	Unilever
69	Huawei Mobile Thailand	826,480	Phones	China	Huawei
70	Merrezca	821,928	Physique	Thailand	Merrezca
71	The Pizza Company 1112 Lovers	814,417	Food Service	Thailand	Minor International
72	Cornetto	813,043	Food / 'Ice cream	UK / Netherlands	Unilever
73	Sansiri Family	797,766	Real Estate	Thailand	Sansiri
74	Ananda Development	792,887	Real Estate	Thailand	Ananda Development
75	TMB	792,685	Financial Services	Thailand	TMB Bank
76	JOHNSON'S Baby	789,142	Physique	US	Johnson & Johnson
77	Bangkok Airways	786,678	Flying	Thailand	Bangkok Airways
78	Smirnoff	783,797	Drinks/Liqour	UK	Diageo

## APPENDICES

### THAILAND (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
79	We Love Swensen's	782,134	Food Service/Ice cream	US	Swensen's
80	ตลาดนัดรถไฟ (Train Night Market)	743,049	Entertainment	Thailand	Chatuchak Weekend Market
81	THEFACESHOP Thailand	742,398	Physique	South Korea	LG Corporation
82	Intel Thailand	737,681	Consumer Electronics	US	Intel
83	ASUS	734,728	Consumer Electronics	Taiwan	ASUS
84	NESCAFÉ	732,466	Drinks / Coffee	Switzerland	Nestlé
85	WearYouWant	732,215	Online Fashion	Thailand	WearYouWant
86	Vitamilk	728,178	Drinks / Milk	Thailand	Green Spot Company
87	Body Glove Thailand	725,202	Fashion / Sports Equipment	US	Dive N' Surf, Inc.
88	Ookbee	722,521	Online Publisher	Thailand	Ookbee
89	MK Restaurants	718,295	Food	Thailand	MK Restaurants
90	น้ันยาง Nanyang	700,337	Fashion	Thailand	Nan Yang Textile Group
91	DDproperty.com	690,201	Online Marketplace / Homes	Thailand	PropertyGuru Pte. Ltd.
92	Hot Pot Buffet	685,968	Food	Thailand	Hot Pot Group
93	Central Online Shopping	684,035	Retail Online	Thailand	Central Group
94	AXE Thailand	682,248	Physique	UK / Netherlands	Unilever
95	AP Thai	678,150	Real Estate	Thailand	AP Thai
96	Zink Superglasses & Coolstuff	676,078	Fashion / Accessoires	Thailand	Zink Superglasses & Coolstuff
97	Microsoft Lumia	671,407	Phones	USA	Microsoft
98	Tooktrip	665,655	Travel	Thailand	H.I.S. Group
99	Chevrolet	660,720	Fuel / Car	US	General Motors
100	Nestlé Pure Life Thailand	660,667	Drinks / Water	Switzerland	Nestlé

## APPENDICES

### PHILIPPINES

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	Happy Man by Starmobile	5,465,028	Phones	Philippines	Starmobile
2	Filipino Vines	5,144,650	Entertainment	Philippines	Twitter
3	Lazada	4,515,251	Fashion Online	Germany / Singapore	Alibaba Group
4	Samsung Mobile	3,904,001	Phones	South Korea	Samsung
5	McDonald's	3,659,620	Food Service	US	McDonald's
6	OLX Philippines	3,501,855	Online Marketplace	South Africa	Naspers
7	Jollibee	3,477,452	Food Service	Philippines	Jollibee Foods Corporation
8	Tokyo Otaku Mode	3,436,685	Fashion / Japanese Pop culture	Japan	Tokyo Otaku Mode Inc.
9	Globe Telecom	3,434,839	Phones / Telecom	Philippines	Globe Telecom / Asiacom
10	NESCAFÉ	3,420,714	Drinks / Coffee	Switzerland	Nestlé
11	Smart Communications, Inc.	3,074,628	Phones / Telecom	Philippines	PLDT
12	Penshoppe	3,003,133	Fashion	Philippines	Golden ABC
13	KitKat	2,897,236	Food / Chocolate	Switzerland	Nestlé
14	BDO Unibank	2,804,796	Financial Services	Philippines	BDO Unibank
15	Cebu Pacific Air	2,597,038	Flying	Philippines	Cebu Air, Inc. / JG Summit Holdings
16	MyPhone	2,535,136	Phones	Philippines	MySolid Technologies & Devices Corp.
17	adidas	2,521,737	Fashion / Sports	Germany / Singapore	adidas
18	Firefly Mobile	2,408,711	Phones	Philippines	Firefly Mobile
19	Kata Philippines	2,261,634	Phones	US / Philippines	Kata
20	Starbucks	2,140,208	Drinks / Coffee	US	Starbucks
21	Del Monte Kitchenomics	2,095,153	Food	US / Philippines	Del Monte Pacific Limited
22	Cebuana Lhuillier	2,063,070	Financial Services / Pawn Shop	Philippines	PJ Lhuillier Group
23	KFC	2,022,074	Food Service	US	Yum! Brands
24	SM Cyberzone	1,932,407	Consumer Electronics	Philippines	SM Cyberzone / SM Investments Corporation
25	OPPO	1,920,041	Phones	China	BBK Electronics
26	Huawei Mobile	1,910,860	Phones	China	Huawei

## APPENDICES

### PHILIPPINES (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
27	Dove	1,864,899	Physique	UK / Netherlands	Unilever
28	Nike Basketball	1,859,177	Fashion / Sports	US	Nike, Inc.
29	Intel	1,822,671	Consumer Electronics	US	Intel
30	ForMe	1,804,399	Fashion	Philippines	Golden ABC
31	ZALORA	1,715,690	Fashion Online	Germany	Zalora Group
32	Sneakers Avenue	1,714,260	Fashion Online	Philippines	Modernosense
33	ASUS	1,693,495	Consumer Electronics	Taiwan	Asus
34	Goldilocks	1,687,587	Food	Philippines	Goldilocks Bakeshop
35	Sunsilk	1,683,433	Physique	UK / Netherlands	Unilever
36	OXYGEN™	1,653,818	Fashion	Philippines	Golden ABC
37	Oreo	1,630,523	Food / Chocolate	US	Mondelez International
38	Datu Puti	1,607,996	Food	Philippines	Nutri-Asia
39	Cadbury Dairy Milk	1,605,295	Food / Chocolate	UK	Mondelēz International, Inc.
40	Gmarket Global	1,580,605	Online Marketplace	South Korea	eBay
41	Lexus International	1,553,541	Fuel / Automobiles	Japan	Toyota Motor Corporation
42	Coca-Cola	1,533,996	Drinks / Fluids	US	Coca-Cola Company
43	H&M	1,533,866	Fashion	Sweden	H&M
44	Philippine Airlines	1,497,634	Flying	Philippines	Philippine Airlines / PAL Holdings, Inc.
45	Palmolive Naturals	1,495,595	Physique	US	Colgate-Palmolive Company
46	AirAsiaPhilippines	1,493,008	Flying	Malaysia	Tune Group
47	ABS-CBNmobile	1,478,314	Phones / Telecom	Philippines	ABS-CBN / Lopez Group of Companies
48	Maggi	1,470,106	Food	Switzerland	Nestlé
49	Windows	1,462,870	Software	US	Microsoft
50	World Balance	1,410,188	Fashion	Philippines	World Balance
51	C2 Cool and Clean	1,392,434	Drinks / Soda	Philippines	Universal Robina / JG Summit Holdings
52	MILO® Philippines	1,381,742	Drinks / Chocolate	Switzerland	Nestlé

## APPENDICES

### PHILIPPINES (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
53	TNTph	1,381,242	Phones / Telecom	Philippines	PLDT
54	Cherry Mobile	1,377,940	Phones / Telecom	Philippines	Cosmic Technologies
55	SKK Mobile Phone	1,370,254	Phones	Philippines	SKK Mobile Phone
56	SM Accessories	1,357,829	Fashion	Philippines	SM Investments Corporation
57	Axe Philippines	1,354,302	Physique	UK / Netherlands	Unilever
58	Converse	1,353,097	Fashion / Sports	US	Nike, Inc.
59	Kia Motors Philippines	1,351,501	Fuel / Automobiles	South Korea	Hyundai Motor Group
60	JUICY Cologne	1,348,955	Physique	Philippines	Cosmetique Asia
61	Closeup	1,343,132	Physique	UK / Netherlands	Unilever
62	Cream Silk Philippines	1,333,365	Physique	UK / Netherlands	Unilever
63	Cornetto	1,323,434	Food / Ice cream	UK / Netherlands	Unilever
64	7-Eleven Philippines	1,306,369	Food / Convenience store	Japan	Seven & I Holdings Co.
65	Kimstore	1,304,506	Consumer Electronics	Philippines	Kimstore
66	Nike	1,299,391	Fashion / Sports	US	Nike, Inc.
67	Selecta Cornetto	1,274,232	Food / Ice cream	UK / Netherlands	Unilever
68	Razer	1,274,070	Entertainment	US	Razer Inc.
69	Toblerone	1,265,700	Food / Chocolate	Switzerland	Mondelēz International
70	San Mig Coffee – Official	1,261,859	Drinks / Coffee	Philippines	San Miguel Corporation
71	MetroDeal Manila	1,246,200	Deal Online	Philippines	transcosmos
72	POND'S	1,244,841	Physique	UK / Netherlands	Unilever
73	Sony Mobile	1,243,053	Phones	Japan	Sony
74	Sun Prepaid	1,237,228	Phones / Telecom	Philippines	PLDT
75	Jobs Global Philippines	1,236,517	Online Vacancies	UAE	Jobs Global
76	Barbie	1,198,846	Toys	US	Mattel
77	Google Chrome	1,187,524	Software	US	Alphabet Inc.
78	Red Horse Beer	1,183,471	Drinks / Beer	Philippines	San Miguel Corporation

## APPENDICES

### PHILIPPINES (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
79	Avon Philippines	1,180,291	Physique	US	Avon Products
80	Keds	1,176,084	Fashion / Shoes	US	Wolverine World Wide
81	Pizza Hut	1,173,898	Food Service	US	Yum! Brands
82	Bounty Fresh Chicken	1,160,895	Food	Philippines	BFGC
83	UNIQLO Philippines	1,156,157	Fashion	Japan	Fast Retailing
84	Burberry	1,147,108	Fashion / Luxury	UK	Burberry
85	Acer	1,140,879	Consumer Electronics	Taiwan	Acer
86	Red Ribbon	1,118,325	Food Service	Philippines	Jollibee Foods Corporation
87	Parisian Shoes and Bags	1,117,971	Fashion	Malaysia	SM Investments Corporation
88	Royal	1,111,474	Drinks / Fluids	Philippines	Coca-Cola Company
89	Shakey's Philippines	1,106,333	Food	US	The Jacmar Companies
90	Lenovo	1,101,538	Phones	China	Lenovo
91	Havaianas	1,098,130	Fashion	Brazil	Alpargatas S.A.
92	BPI	1,090,667	Finance	Philippines	Bank of the Philippine Islands
93	PLDT Home	1,083,442	Phones/Telecom	Philippines	PLDT
94	Dunkin' Donuts	1,082,339	Food Service	US	Dunkin' Brands
95	National Book Store	1,064,166	Book Retail	Philippines	National Book Store
96	Silka Skincare	1,049,476	Physique	Philippines	Cosmetique Asia
97	Plains & Prints	1,048,334	Fashion	Philippines	Plains & Prints
98	The SM Store (Department Store Official Page)	1,032,924	Department Store	Philippines	SM Investments Corporation
99	TORQUE	1,031,514	Phones	Philippines	Torque Mobile
100	SM Shopmag	1,023,643	Fashion Online	Philippines	SM Investments Corporation

## APPENDICES

### VIETNAM

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
1	NhacCuaTui.com	6,725,839	Music	Vietnam	
2	Samsung Mobile Vietnam	3,806,871	Phone / Hardware	South-Korea	Samsung
3	Foody.vn	2,937,205	Food	Vietnam	
4	Lazada	2,382,734	Fashion	Germany / Singapore	Alibaba
5	Chợ Tốt	2,187,830	Online Marketplace	Vietnam	
6	Adidas	2,031,829	Fashion	Germany	Adidas
7	FPT Shop (Fptshop.com.vn)	1,952,240	Phones / Phone Shop	Vietnam	FPT Corporation
8	YaMe Shop	1,775,533	Fashion	Vietnam	
9	Zanado.Com - Cộng đồng	1,677,818	Fashion	Vietnam	
10	Tiki.vn	1,673,969	Shopping Center	Vietnam	
11	Mobiistar	1,621,352	Phone/Hardware	Vietnam	
12	Coca-Cola	1,611,002	Drinks/Fluids	US	Coca-Cola
13	KFC	1,576,634	Food	US	Yum! Brands
14	Jetstar Pacific Airlines	1,540,655	Flying	Vietnam	Vietnam Airlines
15	California Fitness & Yoga Centers Vietnam	1,540,245	Physique/ Sport	Vietnam	
16	Vietjet	1,336,531	Flying	Vietnam	
17	Viettel Telecom	1,329,222	Phones/Services	Vietnam	Viettel
18	Nổi Tóc Thảo Tây	1,326,079	Physique	Vietnam	
19	Android Việt Nam	1,322,543	Phone / Hardware	US	Google
20	OPPO Vietnam	1,245,761	Phones / Services	China	BBK Electronics
21	Lotteria Vietnam	1,115,792	Food	Vietnam	
22	Thời Trang Daisy	1,093,343	Fashion	Vietnam	
23	Sendo.vn	1,092,833	Compare site	Vietnam	FPT Corporation
24	Baskin-Robbins	1,066,843	Food	US	Dunkin' Brands
25	Ngôi nhà Chích Bông	1,042,952	Furniture	Vietnam	
26	Heineken	1,026,074	Drinks / Beer	Netherlands	Heineken

## APPENDICES

### VIETNAM (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
27	Viễn Thông A	1,018,196	Phones / Phone Shop	Vietnam	
28	38 Degree Flowers	962,423	Flowers	Vietnam	
29	Appstore.vn	938,106	Phones / Services	Vietnam	
30	CucRe.vn	920,183	Fashion / Physique?	Vietnam	
31	Yamaha Motor Vietnam	916,780	Fuel / Bikes	Japan	Yamaha Motor Co., Ltd.
32	Rê Mỗi Ngày	913,219	Fashion	Vietnam	
33	Number 1 Dâu & Chanh	912,183	Drinks / Sport	Vietnam	
34	Honda Việt Nam	911,584	Fuel / Bikes	Japan	Honda
35	MIA.vn	906,234	Suitcases / Bags	Vietnam	
36	Bốn mùa yêu thương.com	876,150	News / Media	Vietnam	ALO Media
37	Pizza Hut VN	872,340	Food	US	Yum! Brands
38	Công Ty An Cường	871,918	Furniture	Vietnam	
39	Tra Xanh Khong Do	869,420	Drinks / Soda	Vietnam	
40	Luu.Store	858,993	Fashion	Vietnam	
41	ZALORA	843,233	Fashion	Germany / Singapore	Zalora Group
42	Totoshop	842,981	Fashion	Vietnam	
43	TimViecNhanh.com	840,296	Employment Agency	Vietnam	
44	Microsoft Lumia	836,799	Phones	US	Microsoft
45	Bé Khỏe Lớn Nhanh	808,973	Physique	Vietnam	
46	Mặc Là Xinh	781,169	Fashion	Vietnam	
47	Kamaka.vn	769,907	Fashion	Vietnam	
48	Castrol Bikers Vietnam	769,677	Fuel / Bikes	UK	Castrol
49	Toshiba Vietnam - toshiba.com.vn	761,766	Furniture / Appliances	Japan	Toshiba
50	Intel	746,465	Consumer Electronics	US	Intel
51	THẨM MỸ VIỆN MAILISA	734,317	Physique	Vietnam	
52	EWAY.VN	733,577	Advertising	Vietnam	

## APPENDICES

### VIETNAM (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
53	Rejoice Vietnam	733,481	Physique	US	Procter & Gamble
54	Adam Store	727,994	Fashion	Vietnam	
55	Fshare.vn	718,598	Phones / Services	Vietnam	
56	Shop-For-Gals & Cats	718,194	Fashion	Vietnam	
57	B.store	717,940	Fashion	Vietnam	
58	Ancarat Jewelry - Vàng Phong Thủy	716,924	Fashion / Accessories	Vietnam	
59	Ảnh Viện Áo Cưới Sophia	710,295	Fashion / Wedding planner	Vietnam	
60	MyWork - Công Tuyển dụng, Tìm Việc làm Uy tín, Hiệu quả	709,599	Employment Agency	Vietnam	
61	NESCAFÉ CAFÉ VIỆT	686,768	Drinks / Coffee	Switzerland	Nestlé
62	Trình duyệt Cốc Cốc	684,541	Phone / Software	Vietnam	
63	ASUS	683,561	Consumer Electronics	Taiwan	ASUS
64	Vietnam Airlines	671,216	Flying	Vietnam	Vietnam Airlines
65	Hội những người muốn tăng cân tăng cơ	669,187	Physique / Sport	Vietnam	
66	IVY moda	651,469	Fashion	Vietnam	
67	POND'S	649,998	Physique	US	Unilever
68	Xanh Boutique	642,478	Fashion	Vietnam	
69	Nước Tăng Lực Number 1	640,042	Drinks / Fluids	Vietnam	
70	Maybelline New York - Vietnam	639,409	Physique	France	L' Oreal
71	Sprite	632,636	Drinks / Fluids	Germany / US	Coca-Cola
72	Méo shop	615,582	Fashion	Vietnam	
73	Chia Sẻ Nhạc	611,861	Music	Vietnam	
74	Tiger Beer	609,109	Drinks / Beer	Singapore / Netherlands	Heineken
75	Techcombank Việt Nam	599,722	Finance	Vietnam	
76	Pepsi	599,218	Drinks / Fluids	US	Pepsi
77	Babi.vn	596,107	Fashion / Baby	Vietnam	
78	Sting World	589,034	Drinks / Fluids	US	Pepsi

## APPENDICES

### VIETNAM (Cont.)

RANK	COMPANY NAME	LOCAL FANS	CATEGORY	LAND OF ORIGIN	PARENT COMPANY
79	KidsPlaza.vn	582,849	Fashion / Baby	Vietnam	
80	Giày cao Linhkent	581,710	Fashion / Shoes	Vietnam	
81	HKbike PEGA	568,045	Fuel / Bikes	Vietnam	
82	Huawei Mobile	567,888	Phone / Hardware	China	Huawei
83	EVE Fashion	561,308	Fashion	Vietnam	
84	HTC Vietnam	556,332	Phone / Hardware	Taiwan	HTC
85	NguyenKim	555,190	Electronics	Vietnam	
86	Friso Vietnam	553,358	Food / Baby Nutrition	Netherlands	FrieslandCampina
87	Fanta	546,297	Drinks / Fluids	Germany	Coca-Cola
88	YoMost	544,352	Drinks / Milk	Vietnam	
89	Du lịch giá rẻ - Alêhấp	540,899	Travelling	Vietnam	
90	Tokyo Otaku Mode	537,441	Fashion	Japan	Tokyo Otaku Mode
91	Hội những người muốn giảm cân nhanh	534,699	Physique	Vietnam	
92	VNPT - VinaPhone	534,453	Phones / Services	Vietnam	VNPT
93	Entiati	534,427	Fashion	Vietnam	
94	Oversize Shop	533,756	Fashion	Vietnam	
95	365ok.vn	532,542	Furniture / Bedcover	Vietnam	
96	Trà Thanh Nhiệt Dr. Thanh	531,930	Drinks / Soda	Vietnam	
97	LG Mobile Vietnam	524,481	Phone / Hardware	South-Korea	LG
98	MobiFone	520,339	Phones / Services	Vietnam	VNPT
99	TNG Fashion	504,162	Fashion	Vietnam	
100	AVATAR SHOP	499,349	Fashion	Vietnam	

## APPENDICES

### FIRM ANALYSIS

BRAND	MALAYSIA	SINGAPORE	INDONESIA	THAILAND	PHILIPPINES	VIETNAM	APPEARANCES
Unilever	3	3	12	4	8	1	31
Nestlé	5	3	-	2	4	1	15
Yum! Brands	2	3	2	2	2	2	13
Samsung	3	3	3	1	1	1	12
Coca-Cola Company	1	1	3	1	2	3	11
Alibaba Group	1	2	2	1	1	1	8
Nike, Inc.	3	1	1	-	3	-	8
adidas	2	1	1	1	1	1	7
ASUS	1	1	1	1	1	1	6
BBK Electronics	2	-	1	1	1	1	6
Heineken	1	2	1	-	-	2	6
Huawei	2	-	1	1	1	1	6
Microsoft	2	-	1	1	1	1	6
Zalora Group	1	1	1	1	1	1	6
Diageo	1	1	1	2	-	-	5
PepsiCo	1	-	-	2	-	2	5
Sony	3	1	-	-	1	-	5
Starbucks	1	2	-	1	1	-	5
Tokyo Otaku Mode Inc.	1	-	1	1	1	1	5
Tune Group	1	2	-	1	1	-	5
Alphabet Inc.	1	-	1	-	1	1	4
BlackBerry Limited	1	1	1	1	-	-	4
Fast Retailing	1	1	-	1	1	-	4
HTC	1	1	1	-	-	1	4
Intel	-	-	1	1	1	1	4
Kering	2	2	-	-	-	-	4

## APPENDICES

### FIRM ANALYSIS (Cont.)

BRAND	MALAYSIA	SINGAPORE	INDONESIA	THAILAND	PHILIPPINES	VIETNAM	APPEARANCES
McDonald's	1	1	-	1	1	-	4
Restaurant Brands International / 3G Capital	1	2	-	1	-	-	4
ThaiBev	1	-	-	3	-	-	4
PLDT	-	-	-	-	4	-	4
SM Investments Corporation	-	-	-	4	-	4	7
Burberry	1	1	-	-	1	-	3
Dunkin' Brands	1	-	-	-	1	1	3
Ferrero SpA	1	2	-	-	-	-	3
H&M	1	1	-	-	1	-	3
LG Corporation	-	-	1	1	-	1	3
L'Oreal	-	1	1	-	-	1	3
LVMH	1	2	-	-	-	-	3
Mondelez International	-	-	-	3	-	3	5
Procter & Gamble	-	1	1	-	-	1	3
A.S. Watson Group / CK Hutchison Holdings	1	1	-	1	-	-	3
Ebay	-	1	1	-	1	-	3
Golden ABC	-	-	-	-	3	-	3
Honda	1	-	1	-	-	1	3
Red Bull GmbH	1	-	2	-	-	-	3
Seven & i Holdings Co.	1	1	-	-	1	-	3
Singapore Airlines / Temasek	3	-	-	-	-	3	4
Telkom Indonesia / Ministry of State Owned Enterprises	3	-	-	-	3	-	4

## APPENDICES

### FIRM ANALYSIS (Cont.)

BRAND	MALAYSIA	SINGAPORE	INDONESIA	THAILAND	PHILIPPINES	VIETNAM	APPEARANCES
True Corporation / Charoen Pokphand Group	-	3	-	-	3	-	4
Acer	-	-	1	-	1	-	2
Apple	-	2	-	-	-	-	2
Danone	-	-	2	-	-	-	2
Doctor's Associates, Inc	2	-	-	-	-	2	3
Lenovo	-	-	1	-	1	-	2
Aje Group	-	-	1	1	-	-	2
Axiata Group / Khazanah Nasional	1	-	1	-	-	-	2
CIMB / Khazanah Nasional	1	-	-	1	-	-	2
DBS Bank	-	2	-	-	-	-	2
Ensogo	-	1	-	1	-	-	2
Groupon	1	1	-	-	-	-	2
Hyundai Motor Group	1	-	-	-	1	-	2
IKEA	1	1	-	-	-	-	2
Maxis Communications / Usaha Tegas	2	-	-	-	-	-	2
Nikon	1	1	-	-	-	-	2
Telenor / Government of Norway	1	-	-	1	-	-	2
Tesco	1	-	-	1	-	-	2
Toyota	1	-	-	-	1	-	2
Volkswagen Group	1	1	-	-	-	-	2
Yamaha Corporation	-	1	-	-	1	2	4

## APPENDICES

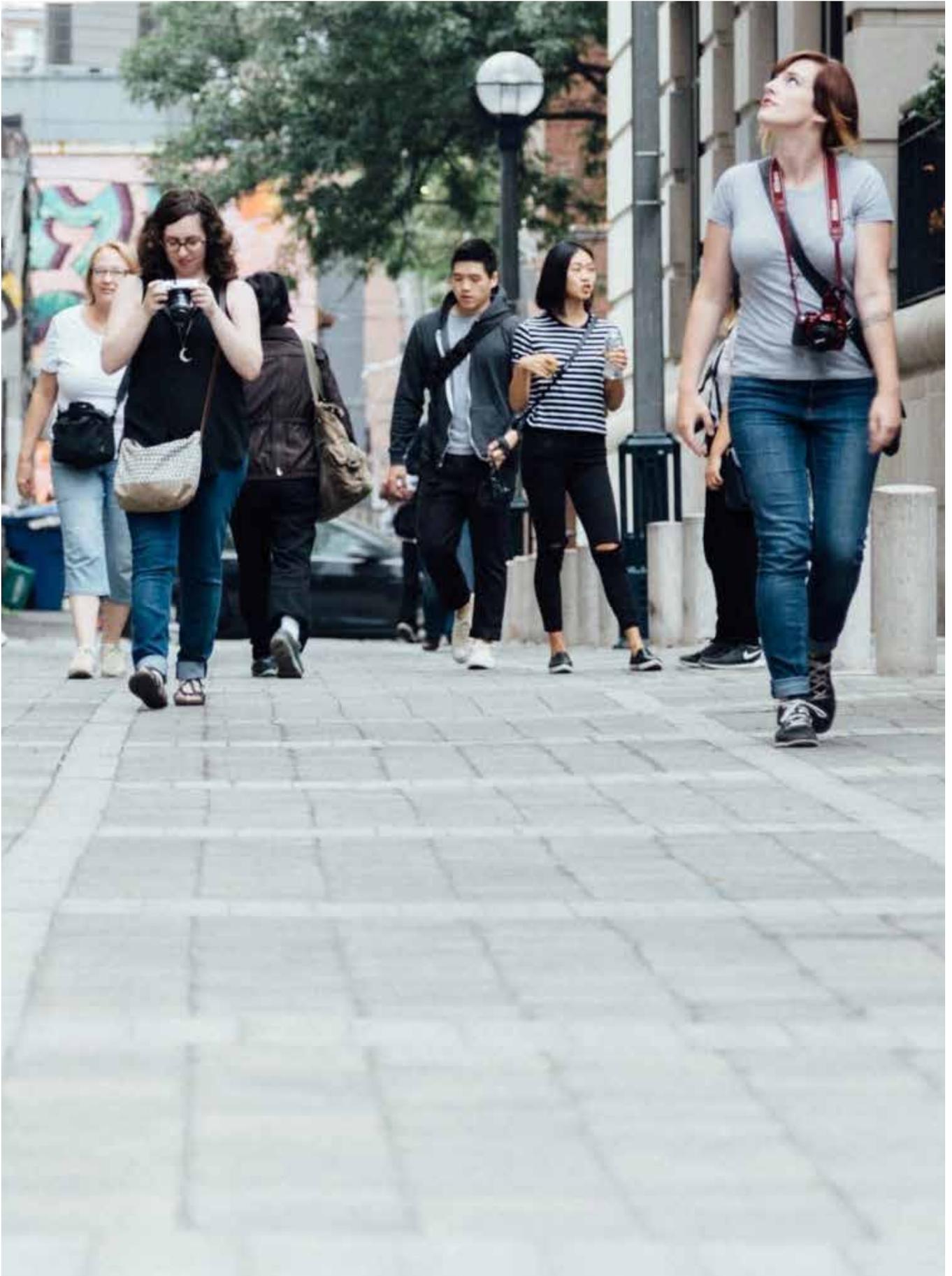
### INTERNATIONAL PERFORMANCE OF ASEAN BRANDS

BRAND	COUNTRY	GLOBAL LIKES	LOCAL LIKES	INTERNATIONAL LIKES
Red Bull	Thailand	43,823,092	370,277	43,452,815
Tiger Beer	Singapore	2,019,813	105,909	1,913,904
Singapore Airlines	Singapore	2,003,217	262,028	1,741,189
Pusat Gamis Terbaru	Indonesia	2,477,192	1,064,681	1,412,511
AirAsia	Malaysia	3,060,177	1,870,604	1,189,573
Vietjet	Vietnam	2,402,566	1,336,531	1,066,035
Shangri-La Hotels and Resorts	Singapore	1,115,243	67,908	1,047,335
Tigerair	Singapore	1,182,865	174,058	1,008,807
Cebu Pacific Air	Philippines	3,480,503	259,703	883,465
Galeri Ariani	Malaysia	1,192,179	468,848	723,331
FlyScoot	Singapore	956,290	311,289	645,001
Penshoppe	Philippines	3,623,660	300,133	620,527
Filipino Vines	Philippines	5,739,594	514,465	594,944
Philippine Airlines	Philippines	2,080,225	149,764	582,591
NhacCuaTui.com	Vietnam	7,154,304	6,725,839	428,465
Batik Indonesia	Indonesia	5,517,679	5,102,561	415,118
Chocolatos	Indonesia	2,017,376	1,602,655	414,721
Firefly Mobile	Philippines	2,769,965	240,811	361,254
Jollibee	Philippines	3,831,578	347,452	354,126
Garuda Indonesia	Indonesia	2,023,034	1,675,444	347,590
BDO Unibank	Philippines	3,124,418	280,476	319,622
Oh! Media	Malaysia	2,548,007	2,247,208	300,799
Globe Telecom	Philippines	3,719,626	343,483	284,787
Smart Communications, Inc.	Philippines	3,345,471	3,074,628	270,843
Foody.vn	Vietnam	3,186,330	2,937,205	249,125
Surfer Girl	Indonesia	3,120,872	2,879,703	241,169

## APPENDICES

### INTERNATIONAL PERFORMANCE OF ASEAN BRANDS (Cont.)

BRAND	COUNTRY	GLOBAL LIKES	LOCAL LIKES	INTERNATIONAL LIKES
Prestige Global Designs Pte Ltd	Singapore	285,699	73,255	212,444
Ngôi nhà Chích Bông	Vietnam	1,249,316	1,042,952	206,364
MyPhone	Philippines	2,731,976	2,535,136	196,840
dtac	Thailand	2,230,775	2,040,352	190,423
Happy Man by Starmobile	Philippines	5,634,904	5,465,028	169,876
Digi	Malaysia	1,728,491	1,572,111	156,380
ForMe	Philippines	1,957,638	1,804,399	153,239
Cebuana Lhuillier	Philippines	2,212,366	2,063,070	149,296
Goldilocks	Philippines	1,836,654	1,687,587	149,067
ICHITAN	Thailand	3,706,284	3,580,950	125,334
Jetstar Pacific Airlines	Vietnam	1,645,309	1,540,655	104,654
CIMB Malaysia	Malaysia	1,338,071	1,237,046	101,025



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