

The ASEAN 5000 Survey

How has the brand perception of ASEAN6 towards East Asian changed in the last 10 years?

Part 1

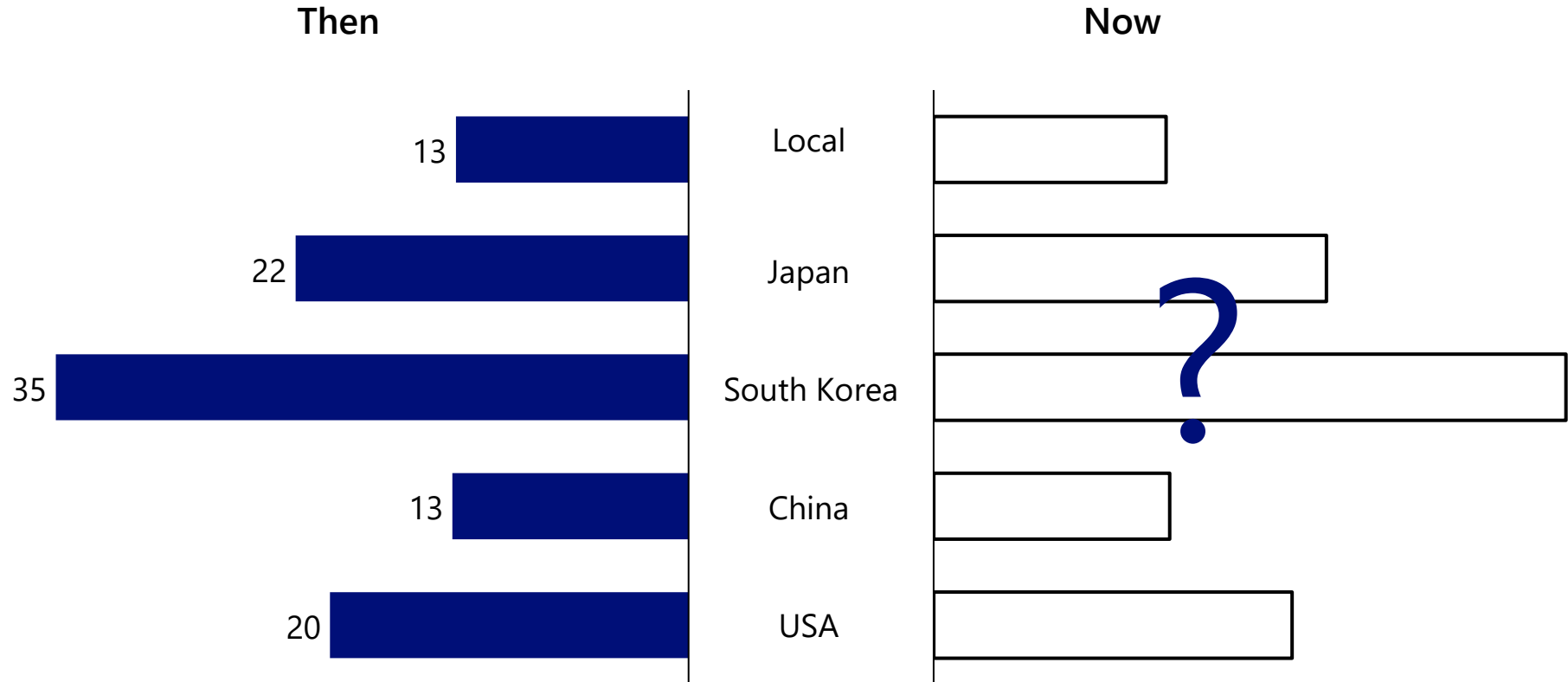
Nomura Research Institute (NRI) Singapore Pte.
Manila Branch

July 2024



About the Survey

In 2013, NRI has conducted a study on ASEAN market attractiveness and consumer perception. After 10 years, we are examining the changes in consumer perception towards Japanese brands and the impact of other East Asian brands



Note: Chart is for illustration purposes only and does not depict actual survey results.

About the Survey

NRI conducted a survey of 5,000 ASEAN consumers including 509 respondents from Manila

- NRI conducted a similar survey in 2014 and did a comparative analysis.

Items	Details	By country		By city		By age group	
		Country names	Numbers of samples	City names	Numbers of samples	Ages	Numbers of samples
Conditions of respondents	<ul style="list-style-type: none"> ■ Males and females aged 20 or above ■ Household annual income of US\$1750 or above <p>Notes: Households with annual income less than US\$1750 are excluded from this survey because some countries justify that the information of these households cannot be collected by the web survey.</p>	Singapore	500	Singapore	500	20s	1733
		Malaysia	503	Kuala Lumpur	503	30s	2020
		Thailand	1,500	Bangkok (Metropolitan)	502	40s	1218
				Bangkok (Suburban)	503	50 years or above	560
Indonesia	1,515	Jakarta (Metropolitan)	502				
		Jakarta (Suburban)	509				
		Surabaya	504				
Philippines	509	Manila	509				
Vietnam	1,003	Ho Chi Minh City	502				
		Hanoi	501				

509 respondents from Manila, Philippines

About the Survey

In this 3-part article series, we will explore the differences in consumer perception of the ASEAN6 countries and the Philippines, and dive deeper on its relevance and impact on the automobile industry, particularly for EV

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How has the brand perception of ASEAN6 towards East Asian changed in the last 10 years?

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How has the brand perception of Filipinos towards East Asian brands changed in the last 10 years?

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Case study on EV



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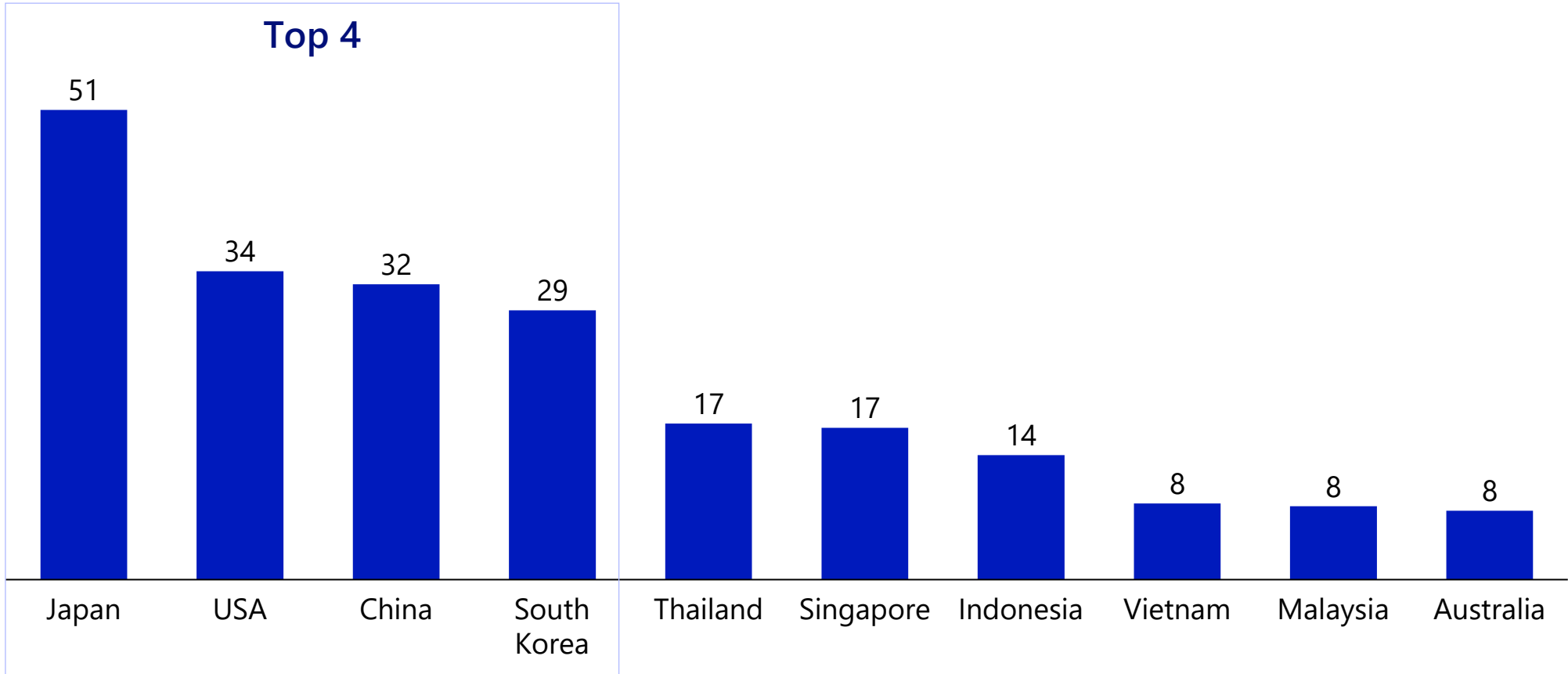


Overall shifts in the brand perception of ASEAN6

According to the 2023 survey, Japanese brands have the most positive image in ASEAN6, followed by American, Chinese, and South Korean brands

Question: Which country's brand image has a positive impact on domestic products and services?

(For overall ASEAN; multiple answers, in %)



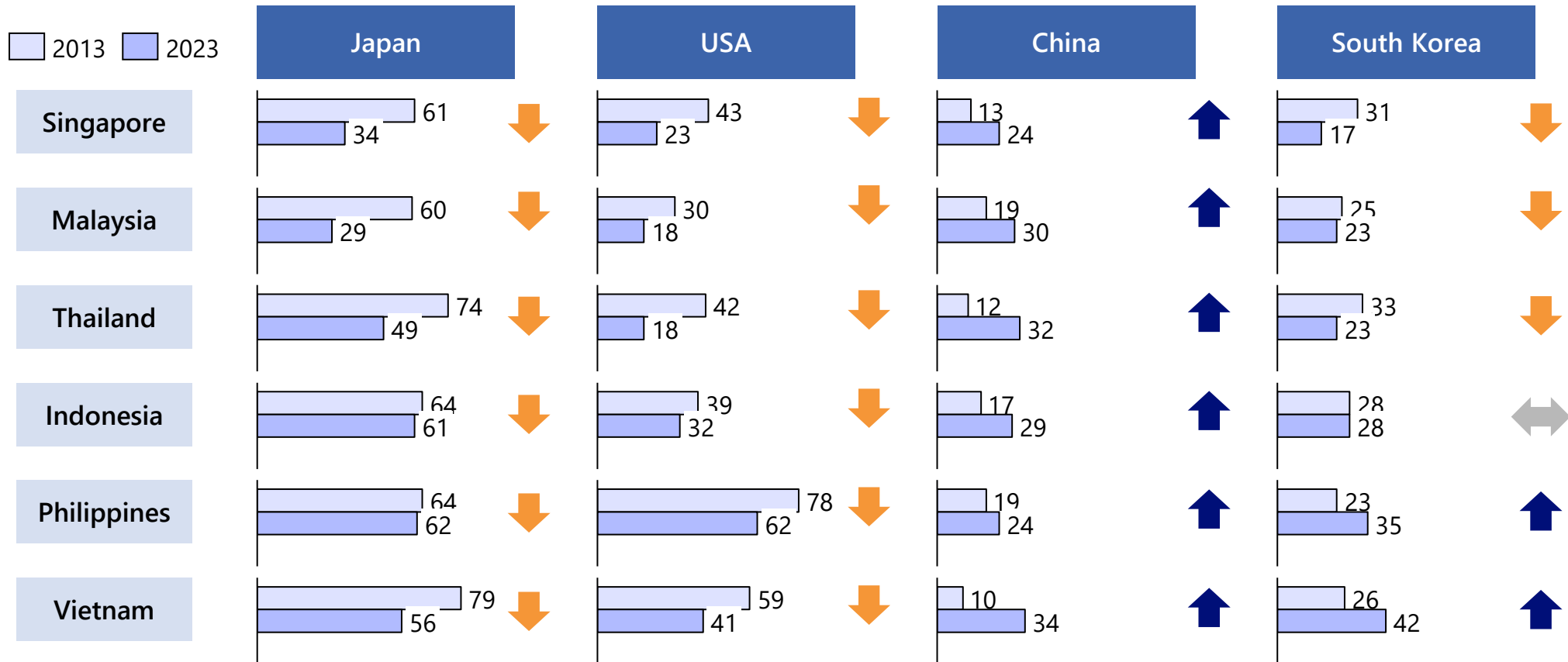


Overall shifts in the brand perception of ASEAN6 | 10-year Comparison

Comparing with the previous survey, there are notable shifts in the perception of the top 4. Although Japanese brands maintained a generally positive impression, there is a noticeable decline while Chinese and South Korean brands have improved their images.

Question: Which country's brand image has a positive impact on domestic products and services?

(Individual countries; multiple answers, in %)





Overall shifts in the brand perception of ASEAN6 | Top 3 Keywords

Of the top East Asian brands, Japanese and Korean brands are deemed reliable, while Chinese brands are seen as creative. American brands, on the other hand, are perceived as professional in ASEAN6 countries

Overall perception (top three keywords) of brand image in ASEAN6 countries

(Multiple answers, in %)



(Reference) Perception of Brand Image

South Korean and Chinese brands are also perceived as stylish and youthful

Image of each country's brand products
(multiple answers, overall)

	Japan	China	South Korea	USA	Europe	Home County	Southeast Asia (except Home Country)
Reliable	52%	16%	38%	41%	41%	50%	26%
Professional	43%	16%	33%	43%	40%	23%	21%
Trust	41%	13%	30%	31%	33%	54%	23%
Creative	39%	32%	35%	31%	30%	35%	28%
Modern	36%	20%	35%	40%	36%	18%	17%
Unique	33%	25%	29%	24%	24%	32%	28%
Intellectual	29%	13%	18%	22%	21%	14%	13%
Stylish	26%	17%	33%	27%	30%	19%	20%
Authentic	24%	10%	18%	18%	19%	24%	19%
Dedication	22%	12%	18%	17%	18%	19%	18%
Courteous	22%	10%	17%	14%	16%	23%	18%
Luxurious	21%	10%	22%	30%	39%	9%	11%
Sophisticated	20%	10%	16%	21%	25%	9%	11%
Glamorous	18%	10%	22%	22%	25%	13%	13%
Friendly	17%	13%	15%	10%	10%	31%	22%
Challenging	16%	19%	16%	20%	18%	11%	17%
Youthful	16%	14%	27%	13%	13%	15%	17%
Reasonable	15%	18%	14%	11%	11%	22%	19%
Healthy	14%	4%	10%	7%	8%	16%	8%
Simple	13%	22%	10%	7%	6%	31%	22%
None that apply	1%	11%	2%	2%	2%	1%	4%



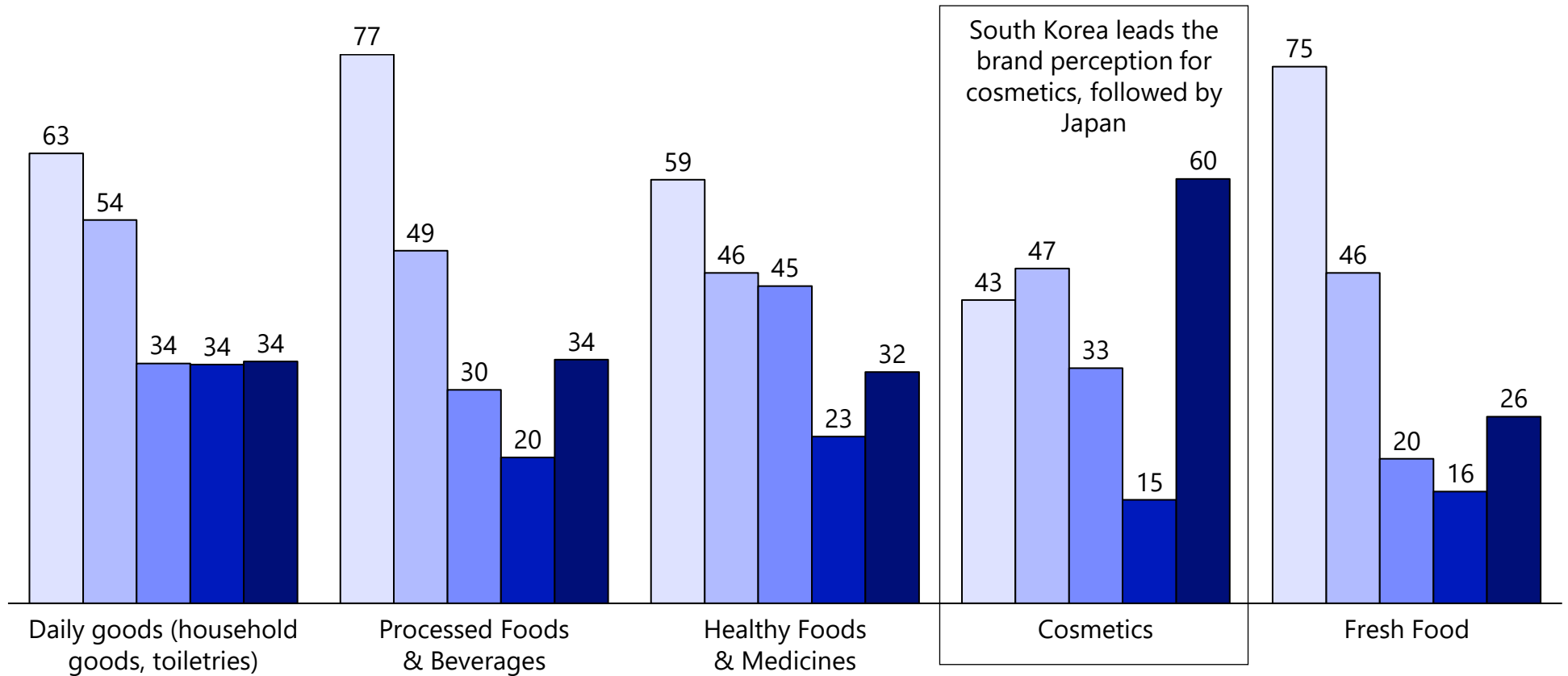
Overall shifts in the brand perception of ASEAN6 | Regularly Purchased Products

Perceived as reliable, Japanese brands are the second choice for regularly purchased products next to home country brands (except for cosmetics).

Question: Which country's products do you purchase?

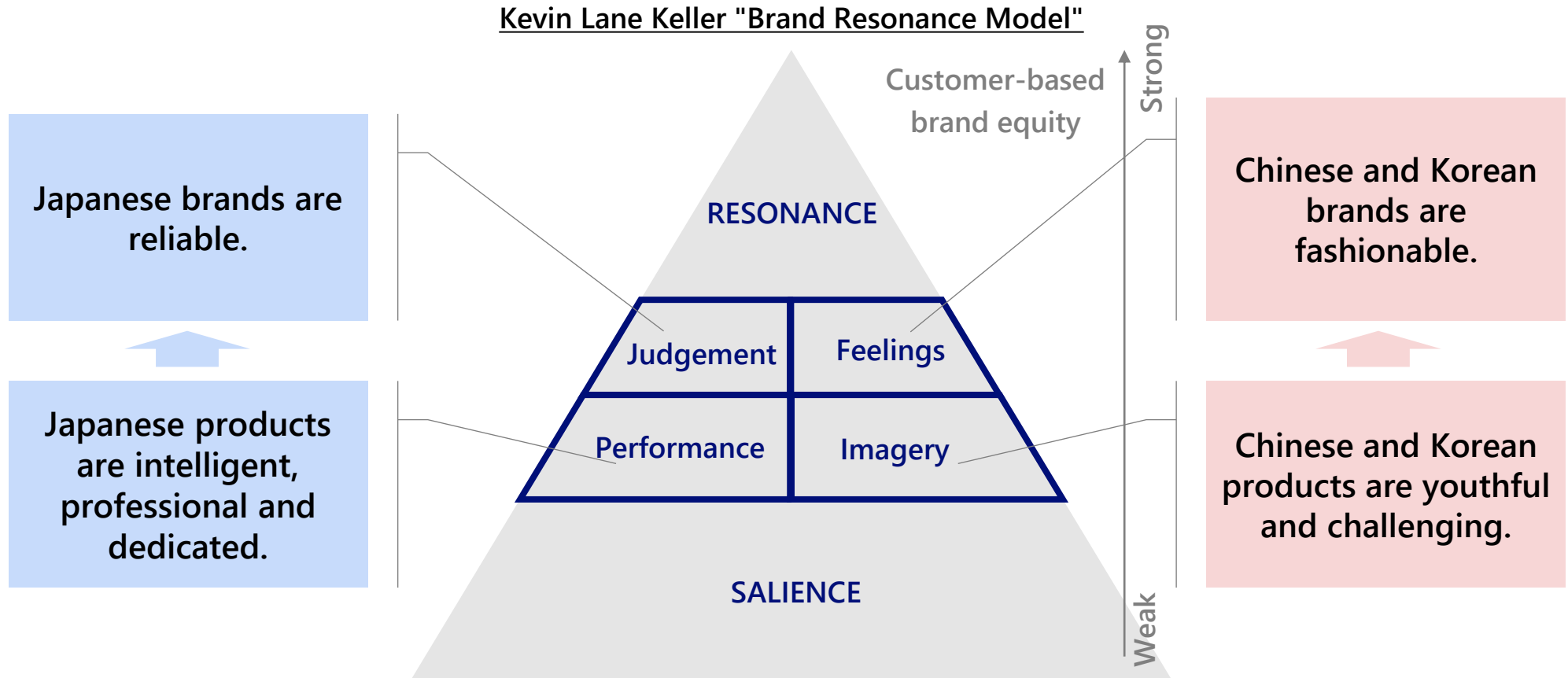
(multiple answers, overall)

Home Country Japan USA China South Korea



Overall shifts in the brand perception of ASEAN6 | Brand Resonance Model

Applying the Brand Resonance Model, we hypothesize that while Japanese brands are perceived as good quality, it does not create emotional excitement for consumers unlike Chinese and South Korean brands





**Envision the value,
Empower the change**