

Health & Beauty Stores (H&B) Shoppers Report

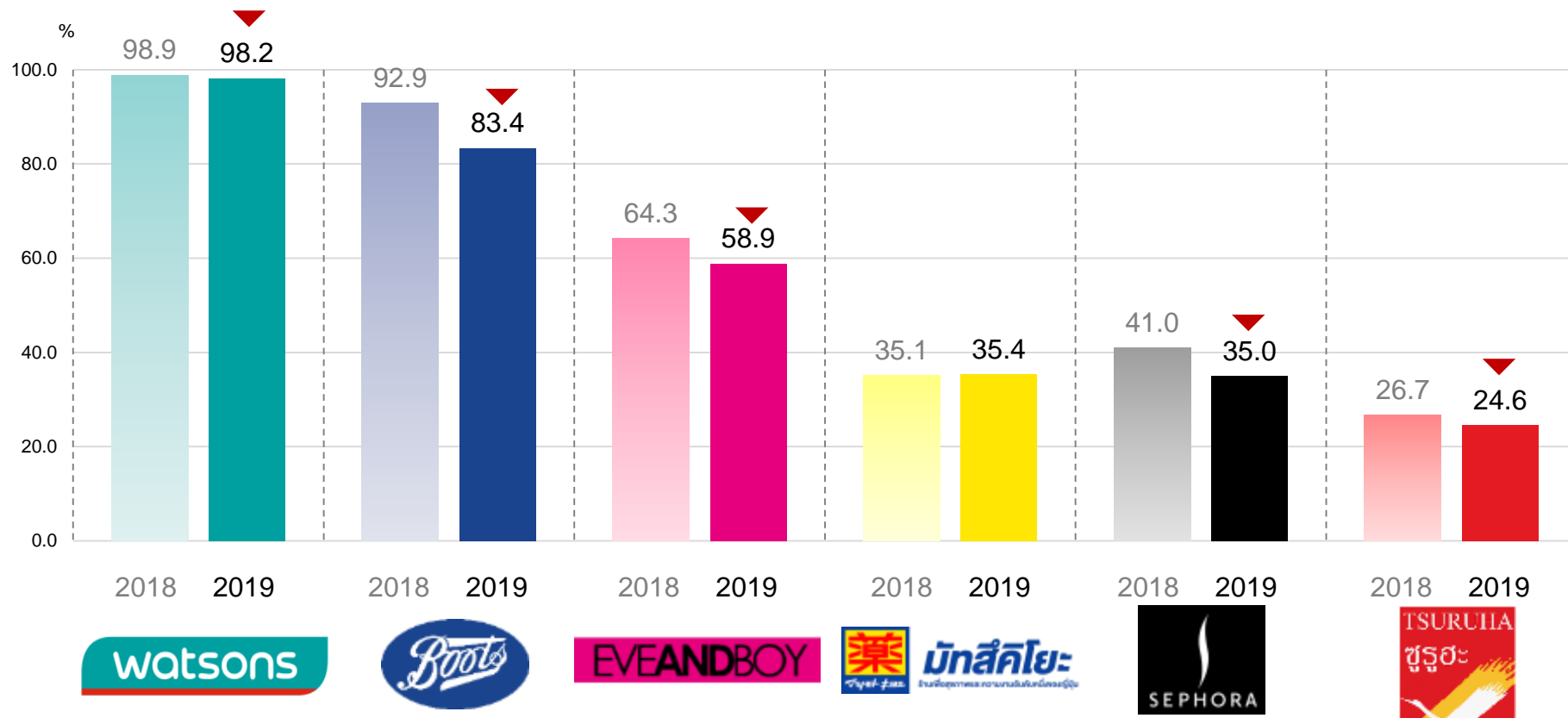
November ,2019



KEY INSIGHTS OF H&B SHOPPERS

Health & Beauty Store Awareness

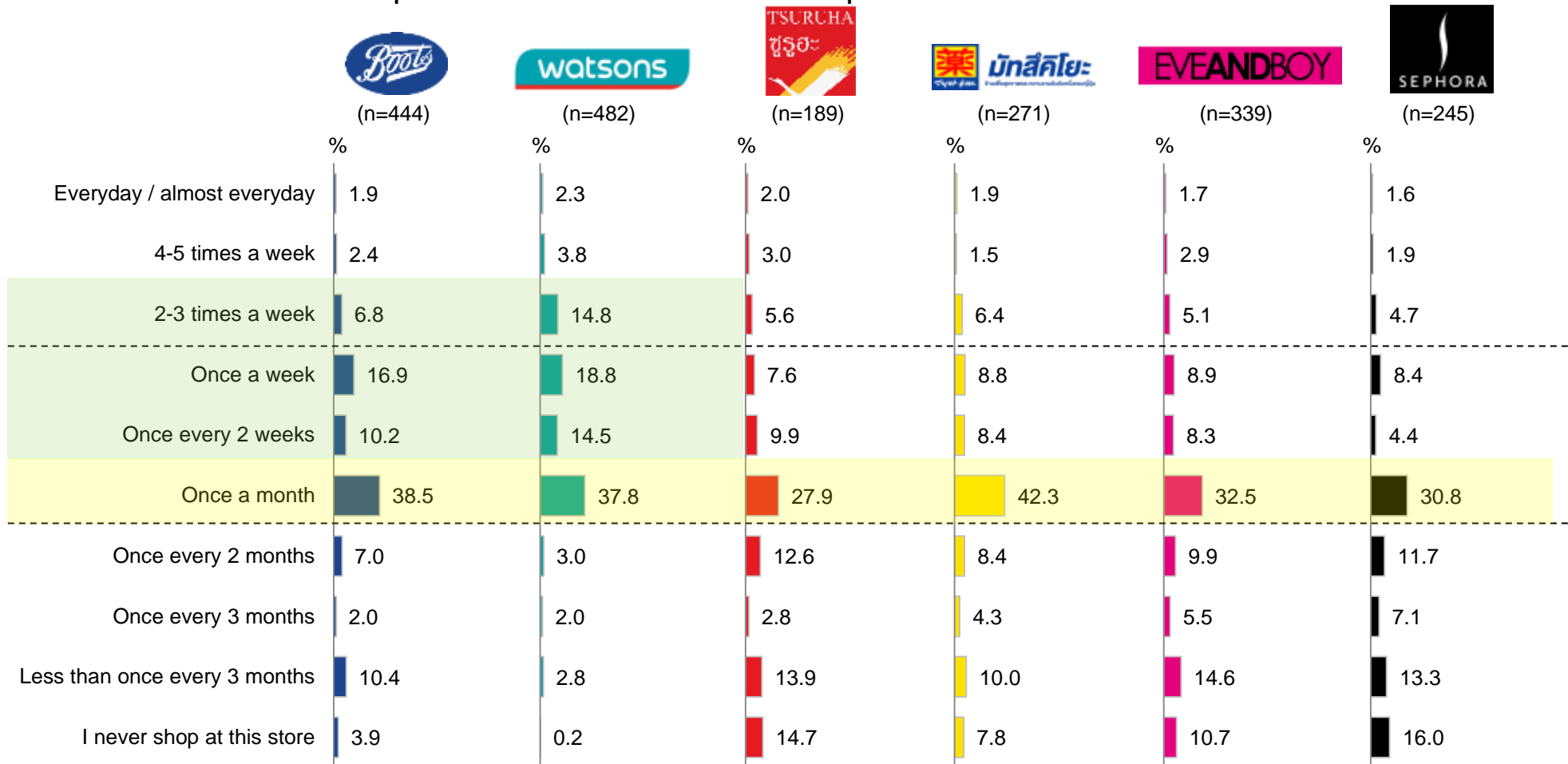
Although almost of health & beauty store awareness drop from the earlier year, **Watson** still gains the highest awareness, followed by Boots and EVEANDBOY.



Base: Total respondents (random) 451 = 100%
 S9. Please select the stores that you have ever seen or heard of [MA]

Frequency of Health & Beauty Stores Visiting

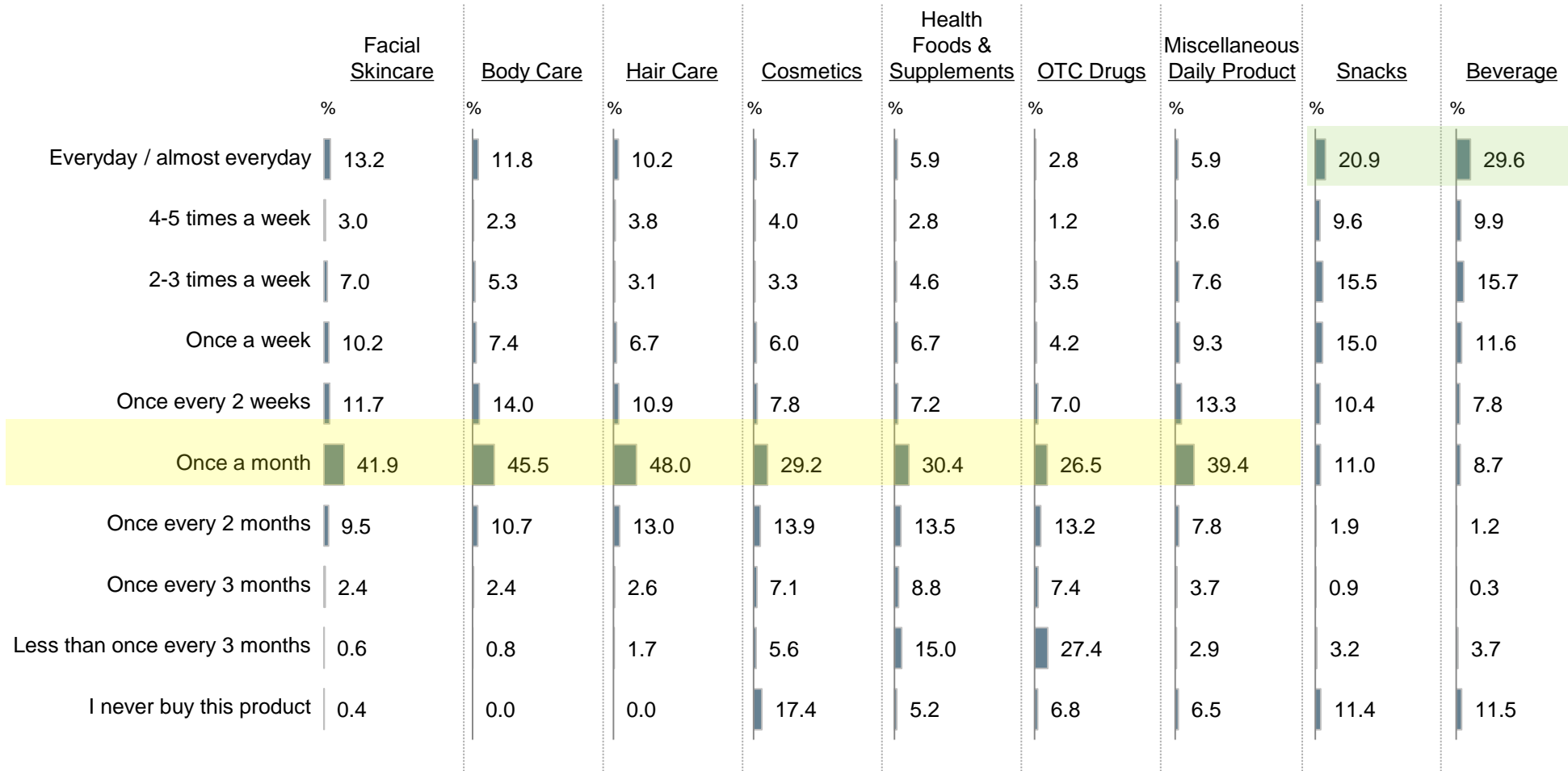
The average frequency of visiting each health and beauty store is around **1 time per month**. However, **Boots and Watson** have a high proportion of visiting rate that is around once a week and 1-3 times per week more than other shops.



Base: Those who ever seen/ heard of each store = 100%
 S10. How often do you shop at each of the stores you know [SA]

Frequency of Product Purchase

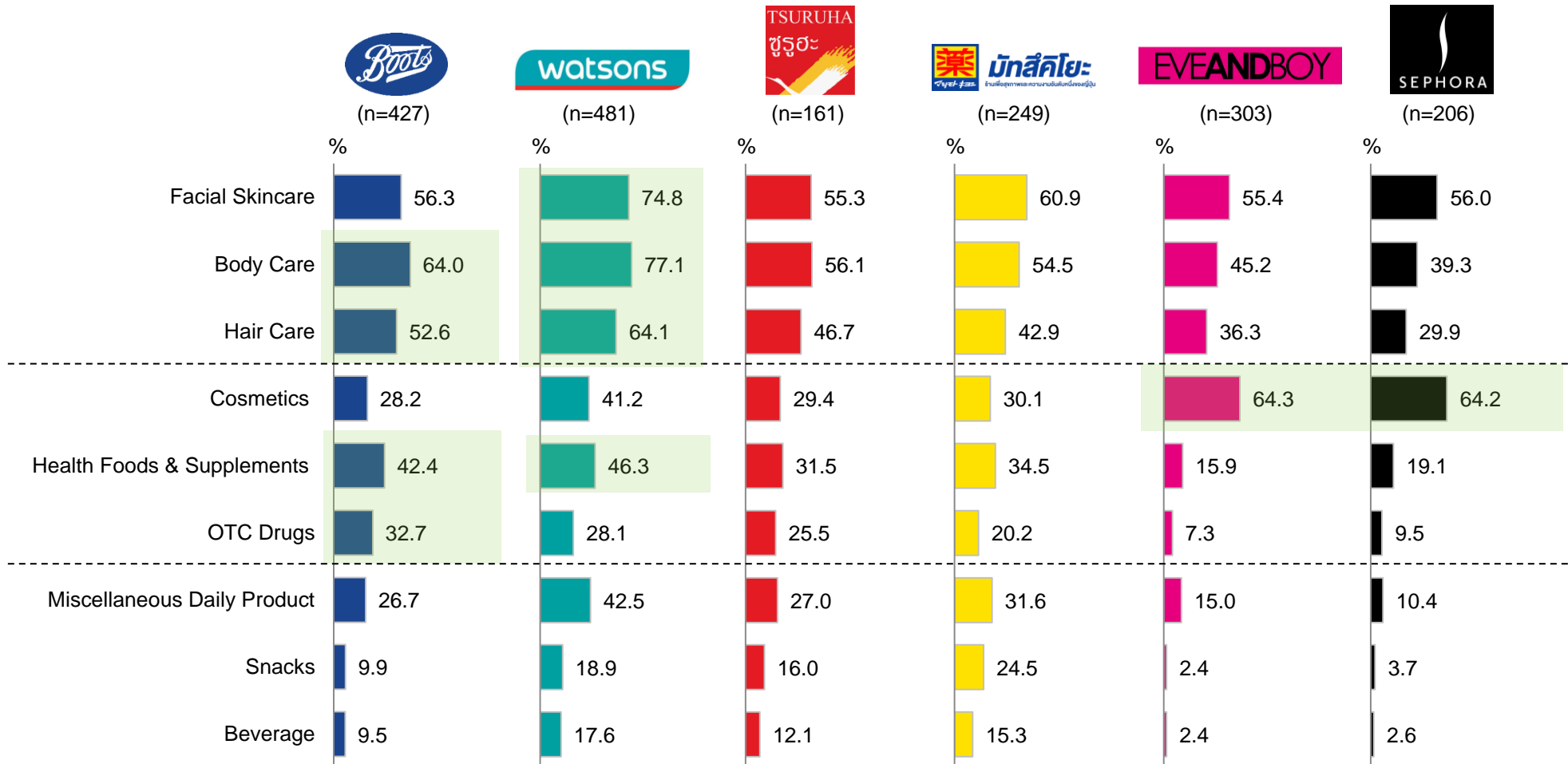
Most of shoppers have a frequency of **purchasing health and beauty product around once a month**, while **snacks and beverage are bought in almost everyday**.



Base: Total respondents 482 = 100%
 Q8 How often do you purchase each of the following products? (SA)

Stores Shopped for Each Product Category

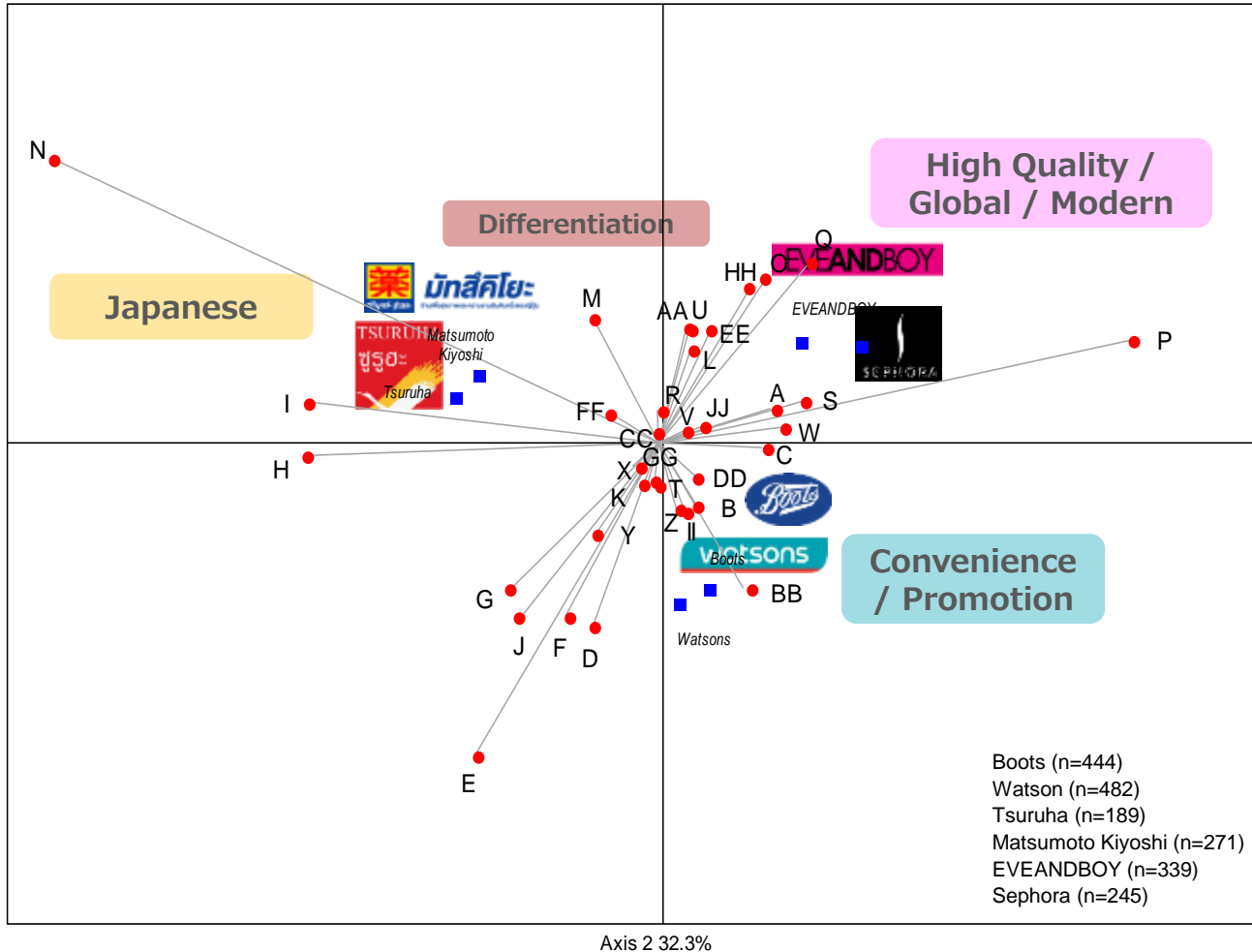
Shoppers mostly buy **health care and skin care** product from **Boots and Watson**, whereas they buy **cosmetics** from **EVEANDBOY and SEPHORA**.



Base: Those who ever purchase at each shop = 100%

Q9 What products do you purchase at each shop? Please select all the products that you purchase at each particular shop (MA)

Brand Association of Each Store



Products

- A : Variety of facial care products available
- B : Variety of skin care products available
- C : Variety of cosmetics available
- D : Variety of health foods and supplements available
- E : Variety of OTC drugs (Over the counter) available
- F : Variety of small and varied products (apart from personal care products) available
- G : Variety of drinks available
- H : Variety of snacks available
- I : Variety of processed foods available
- J : Variety of small and varied products for daily use available
- K : Variety of electronic appliances available
- L : New products available
- M : Different products from other stores available
- N : Many Japanese products available
- O : Many Korean products available
- P : Many European and American products available
- Q : High quality products available
- R : Products always available
- S : Product samples/ testers available for testing

Staff/ Services

- T : Friendly and hospitable staff
- U : Foreign language translation service available
- V : Product suggestion service available
- W : Beauty specialized staff available
- X : Healthcare specialized staff available
- Y : Cheaper price range of products
- Z : Attractive promotions available
- AA : Many cashier stations available/ short queue
- BB : Special privilege for members
- CC : Promotional advertisements available

Stores

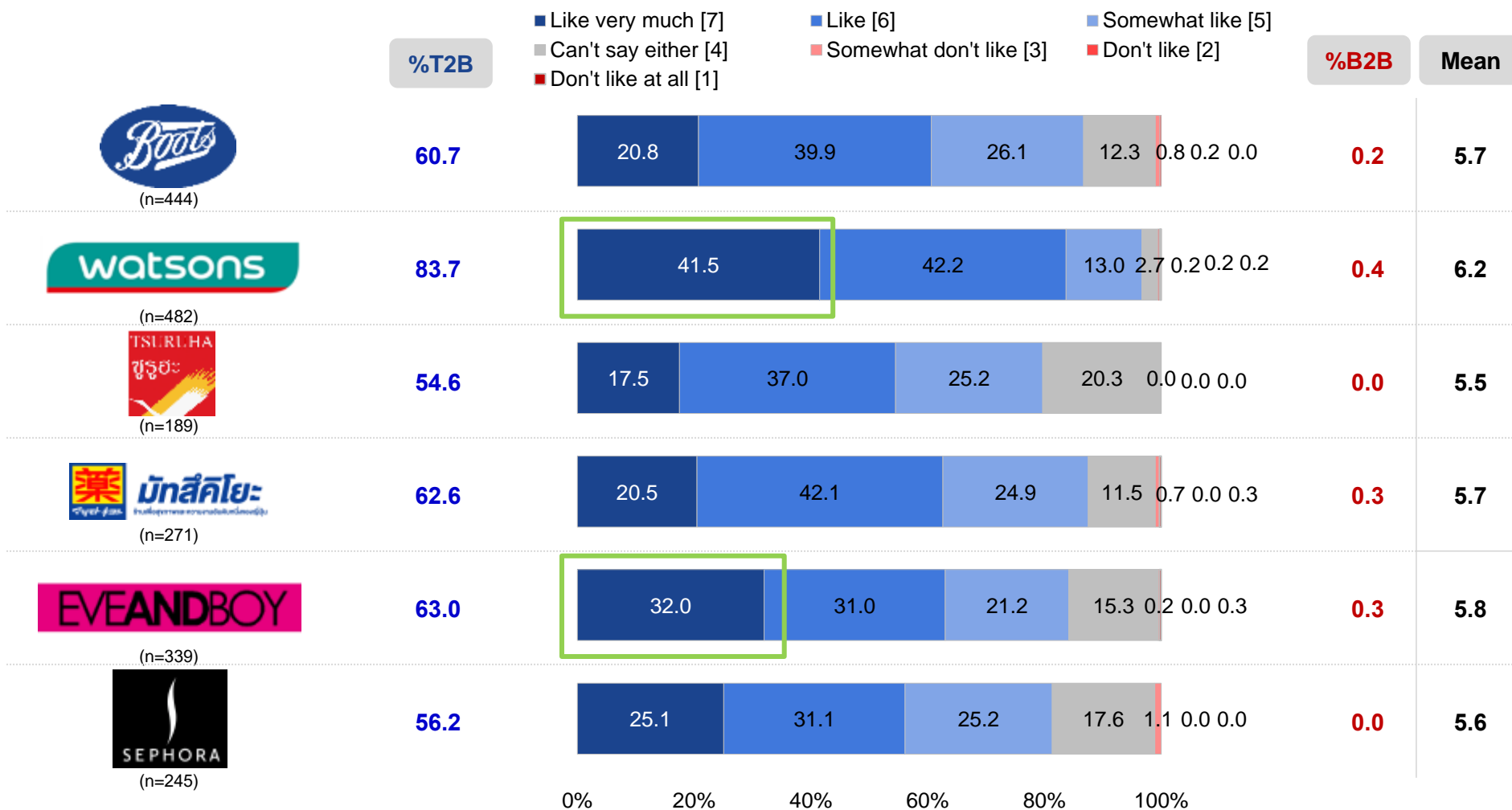
- DD : Easy-to-find product layout display
- EE : Spacious store
- FF : Light and bright store
- GG : Clean store
- HH : Modern/ Stylish store
- II : Convenience
- JJ : Located in department store/ shopping mall

Base: Those who ever seen/ heard of each store = 100%

Q2. Please select all of the attributes that match with the image of each store (MA)

Shopper's Satisfaction Towards Each Store

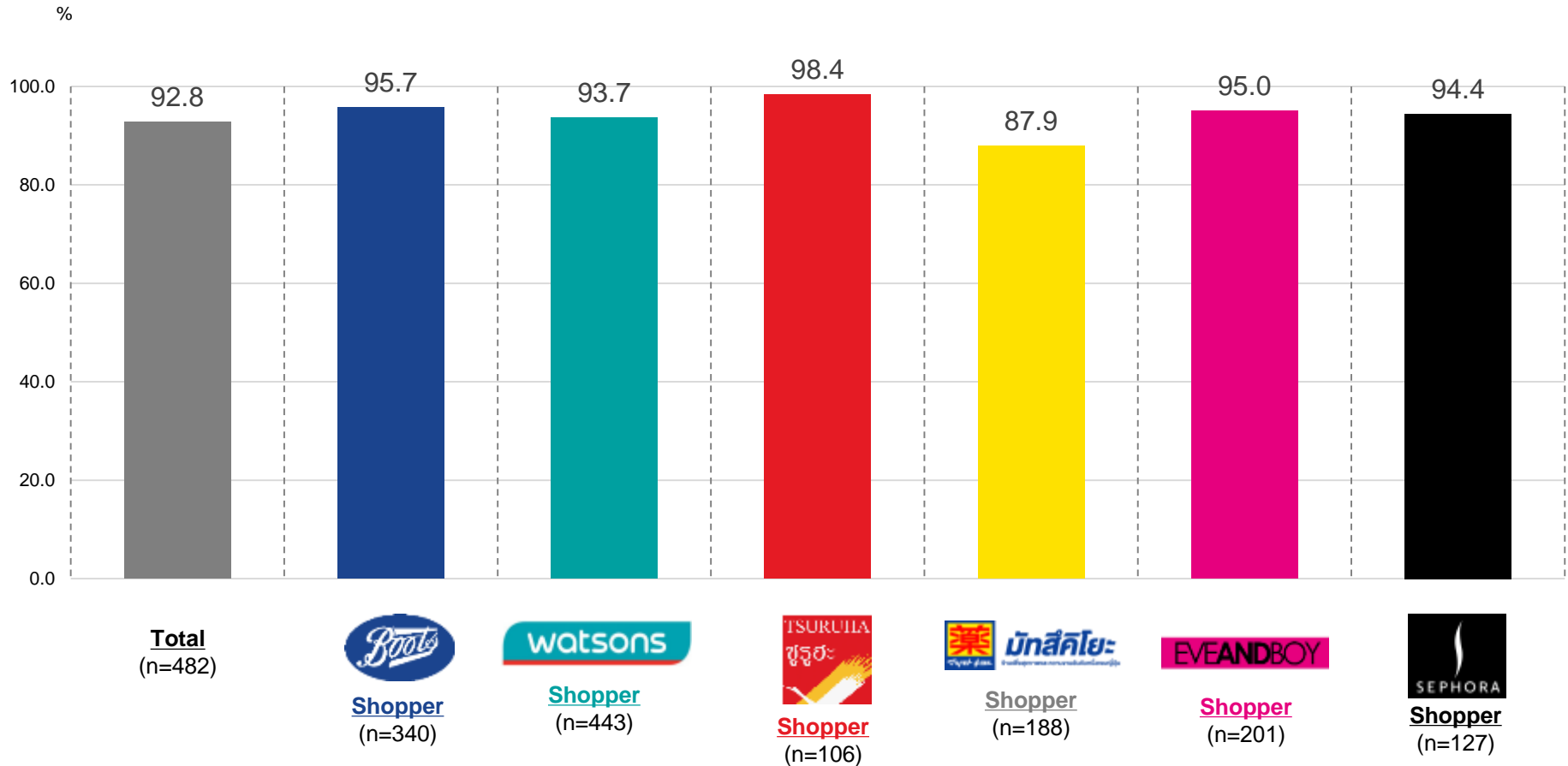
Watsons and EVEANDBOY have a high percentage in extremely liking. Moreover, CMK gets high satisfaction from shoppers as well.



Base: Those who ever seen/ heard of each store = 100%
 Q4 Please select your likability that matches for each of the store (SA)

Online Shopping by Smart Phone

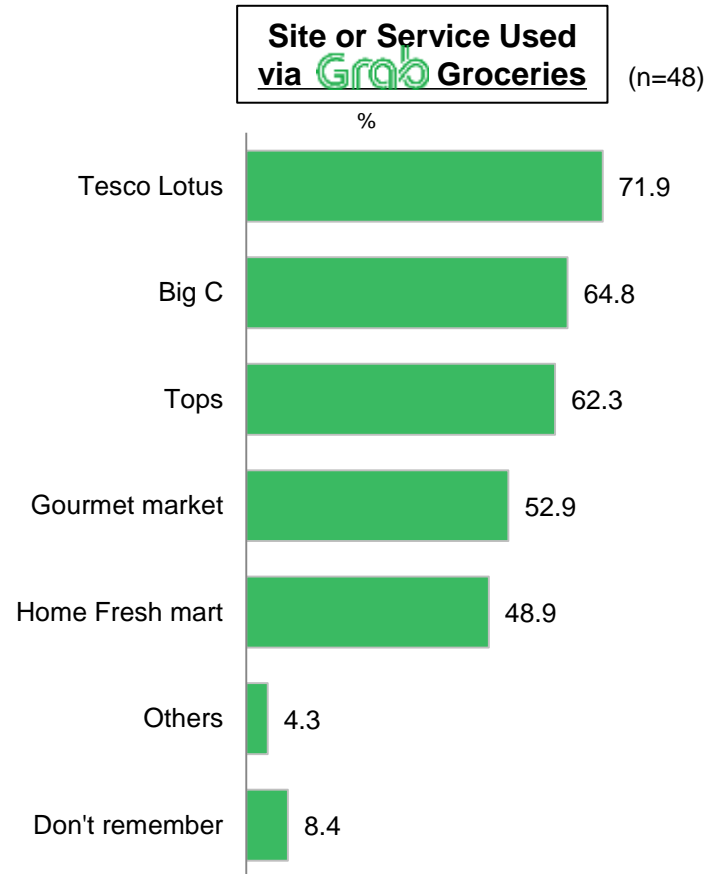
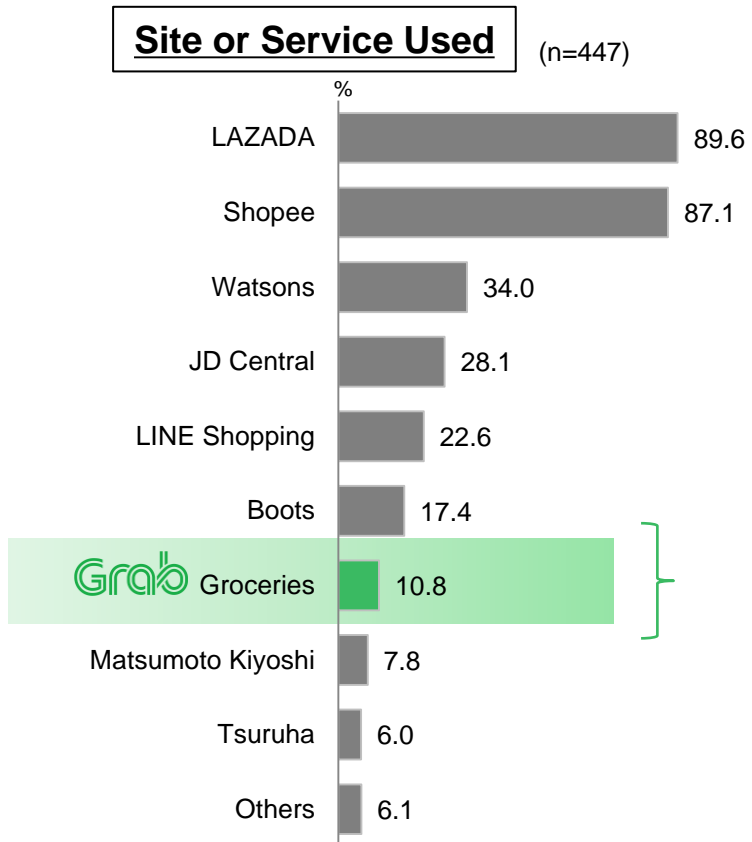
Almost of H&B shoppers have been done an online shopping via smart phone, especially in Tsuruha shoppers.



Base: Those who ever done any online shopping by smart phone= 100%
 Q24. Which site or service have you ever used for your online shopping? [MA]

Grab-Groceries Used

Only 10.8% of online shoppers use a service from grab groceries and they use the service for buying products from Tesco Lotus, Big C and Tops respectively.



Base: Total respondents = 100%

Q23. Have you ever done any online shopping by smart phone? [SA]

Q24. Which site or service have you ever used for your online shopping? [MA]

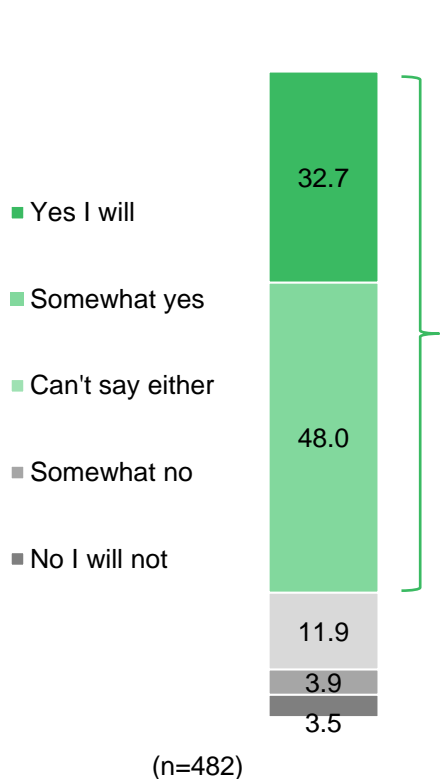
Q25. Which site or service have you ever used for your online shopping via Grab Groceries? [MA]

'Grab Groceries' Application usage

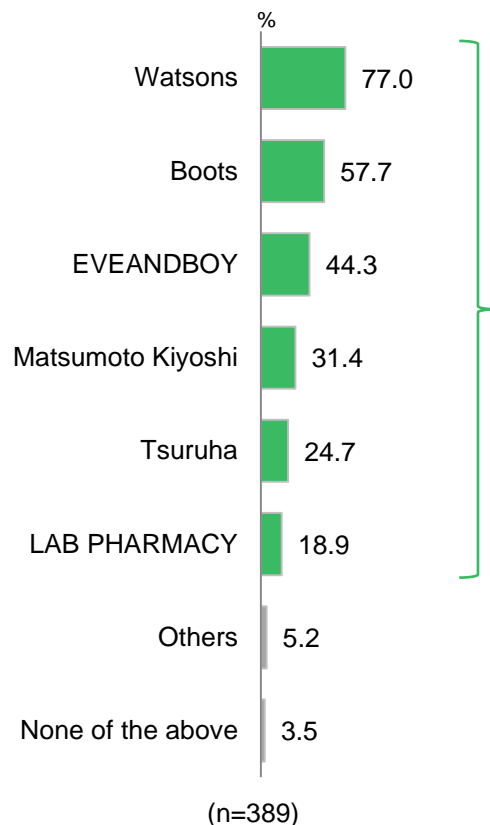


When explain about concept of “Grab Groceries”, Almost of shoppers interested in using the service from Grab groceries for buying **health care and skincare** product in the future.

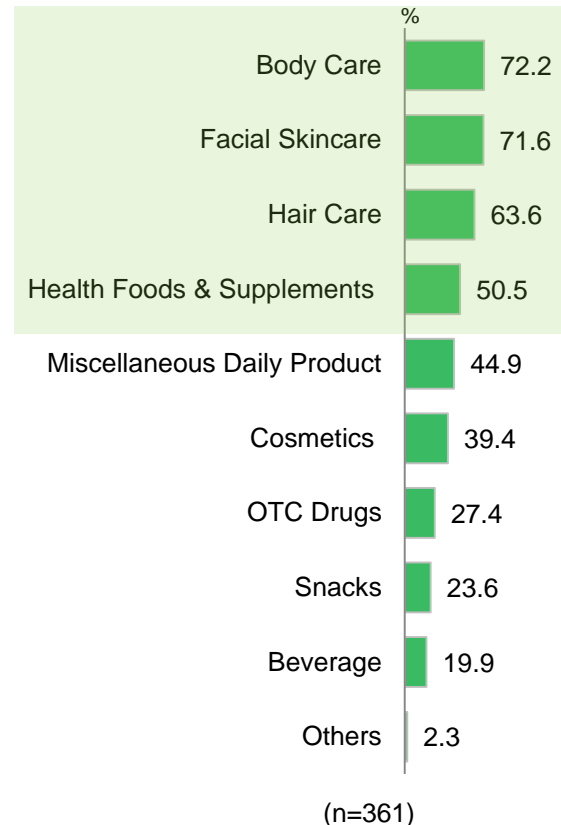
Willingness to Shop via Grab Groceries



Preferred Shop via Grab Groceries



Preferred Product to Shop via Grab Groceries



Base: Total respondents = 100%

Q26. "Grab Groceries is a delivery service which you can buy products sold in the real store such as Tops or Big C using Grab application" Are you willing to shop via Grab Groceries in the future? [SA]

Q27. Which shop do you think you would like to shop using Grab Groceries? [MA]

Q28. Which products do you think you would like to shop using Grab Groceries? [MA]

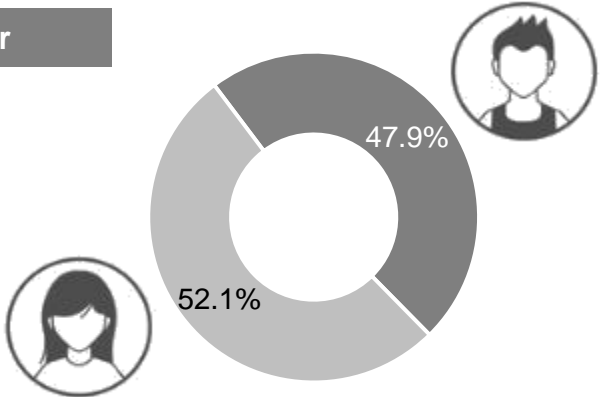


RESPONDENTS' PROFILE

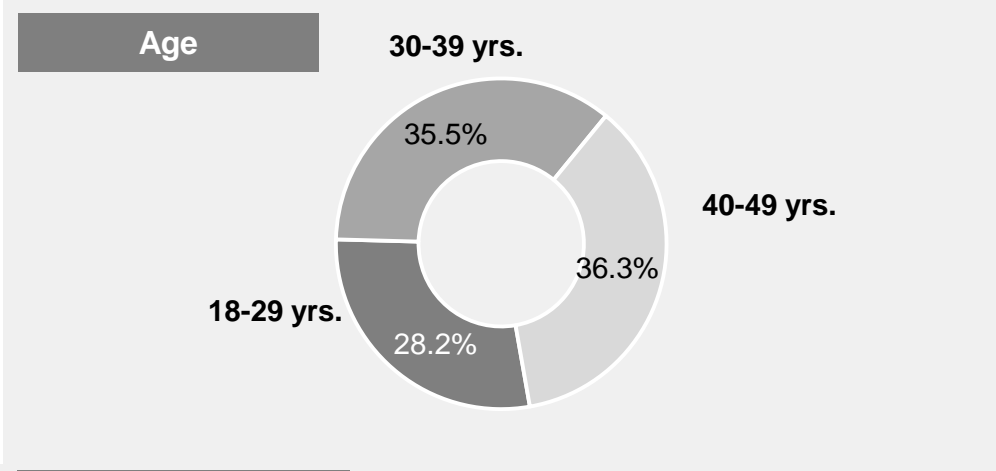
All Shoppers

Remark: Based on Quota Sampling

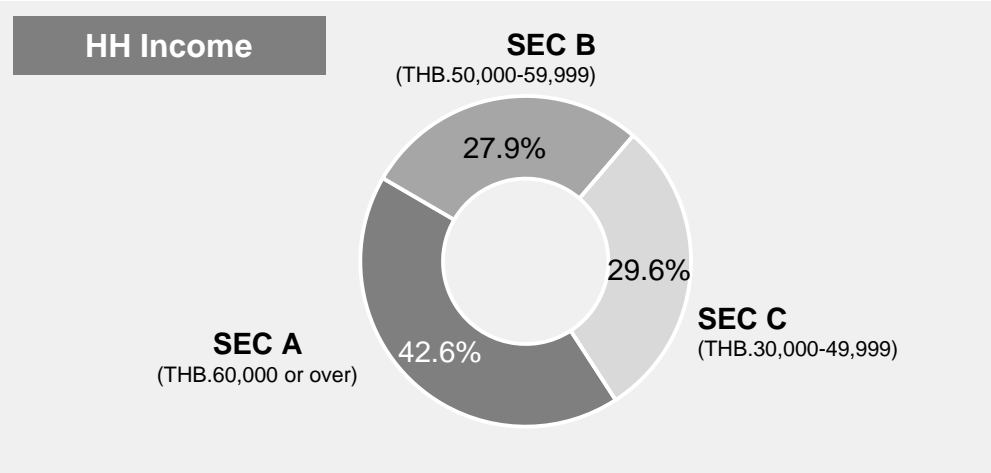
Gender



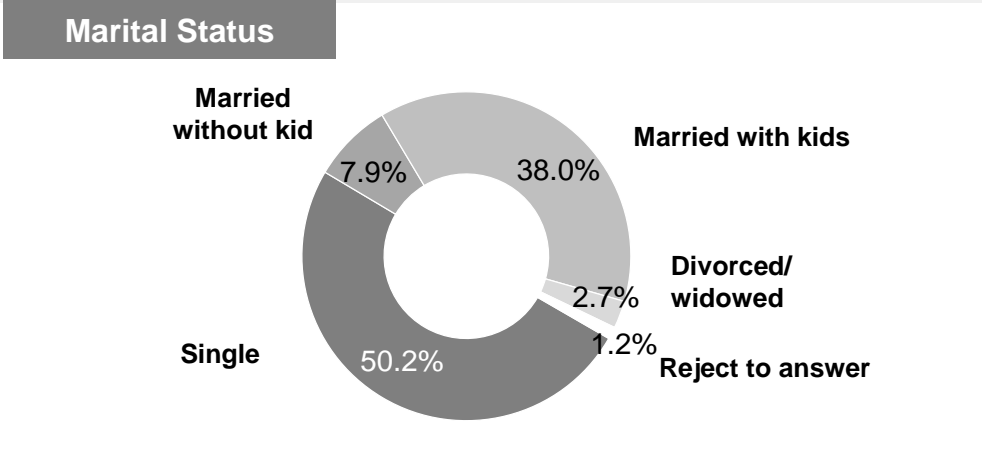
Age



HH Income



Marital Status



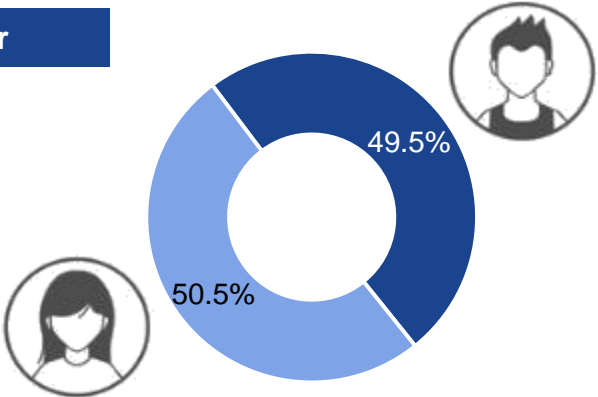
Base: Total respondents 482 = 100%
 S2. Please choose your gender. (SA)
 S3. How old are you? (SA)
 S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
 Q20. Marital status (SA)

Boots Shopper

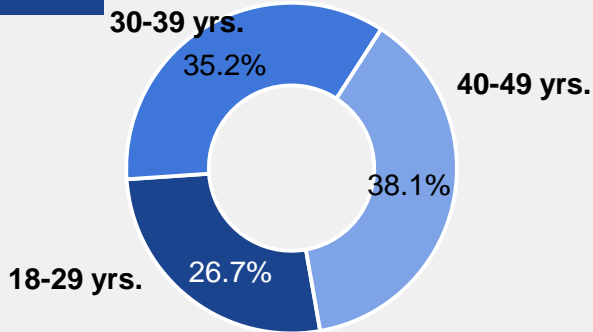
Remark: Based on Quota Sampling

Respondent's Profile

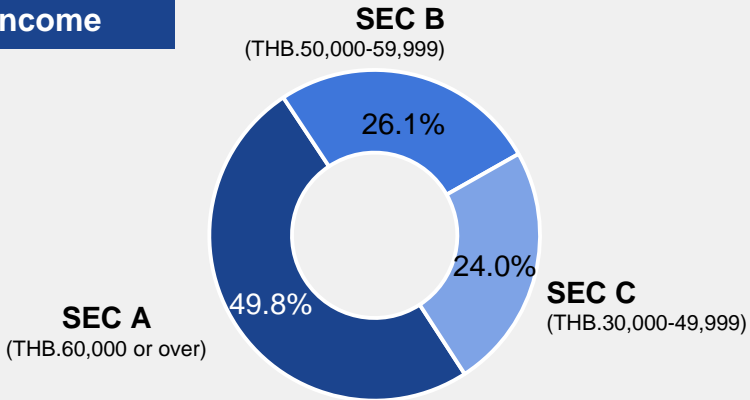
Gender



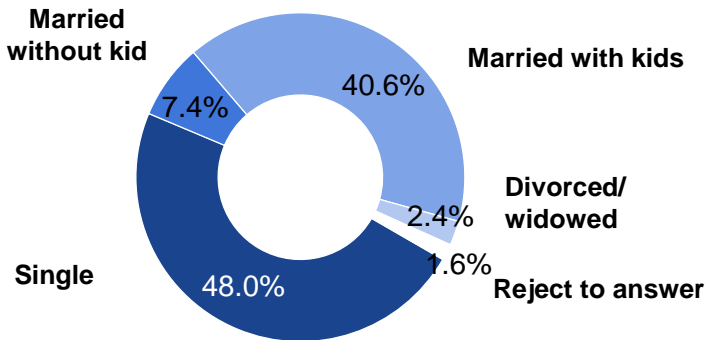
Age



HH Income



Marital Status

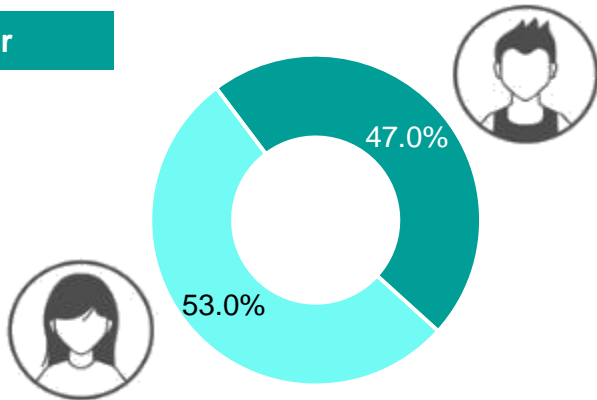


Base: Boots shopper 340 = 100%
S2. Please choose your gender. (SA)
S3. How old are you? (SA)
S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
Q20. Marital status (SA)

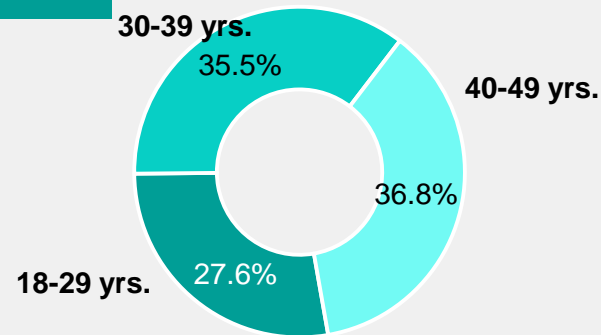
Watsons Shopper

Remark: Based on Quota Sampling

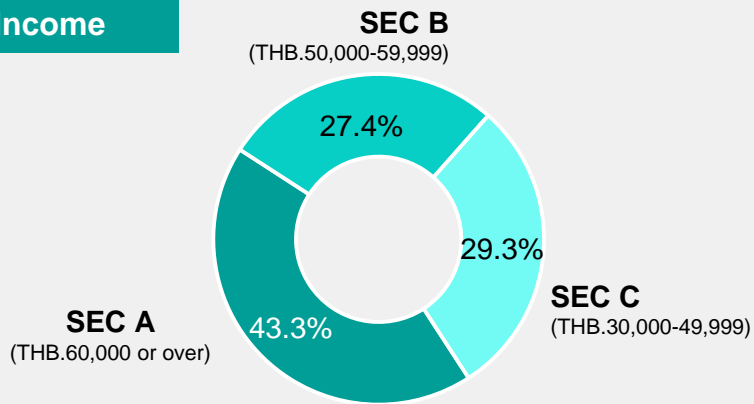
Gender



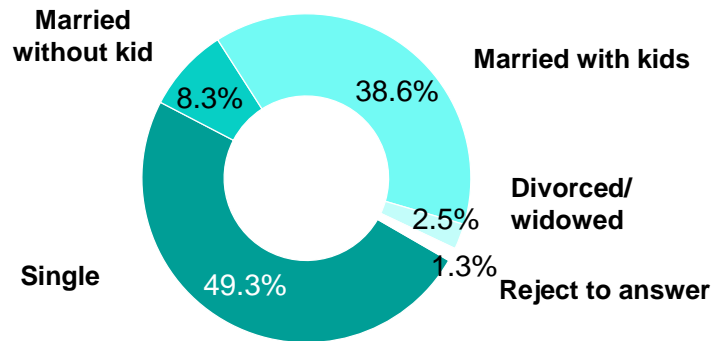
Age



HH Income



Marital Status

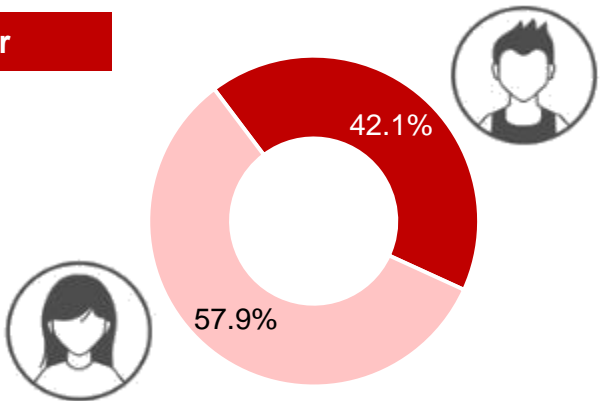


Base: Watsons shopper 443 = 100%
 S2. Please choose your gender. (SA)
 S3. How old are you? (SA)
 S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
 Q20. Marital status (SA)

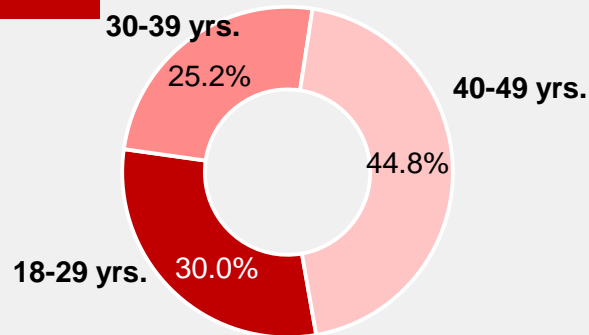
Tsuruha Shopper

Remark: Based on Quota Sampling

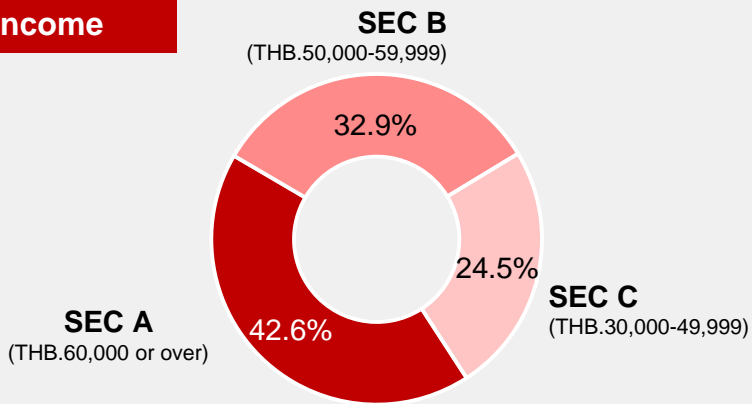
Gender



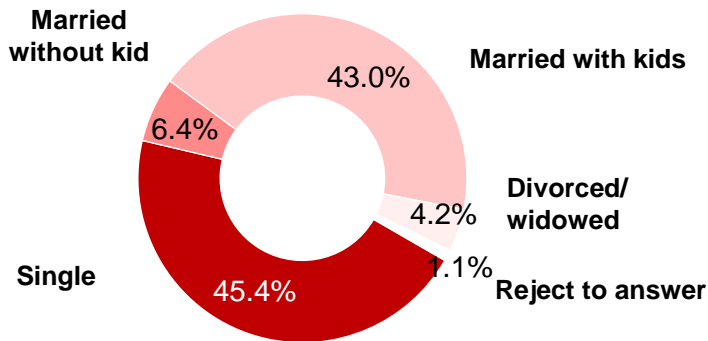
Age



HH Income



Marital Status



Base: Tsuruha shopper 106 = 100%

S2. Please choose your gender. (SA)

S3. How old are you? (SA)

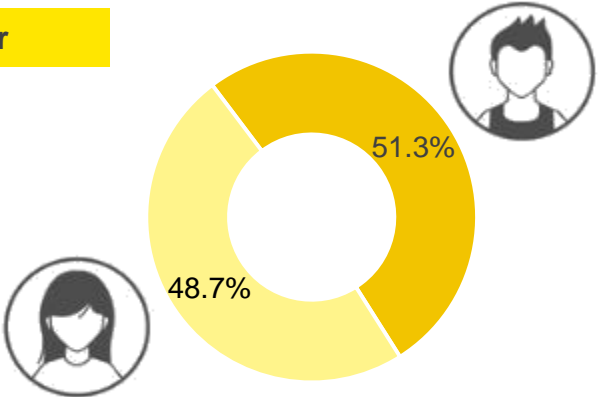
S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)

Q20. Marital status (SA)

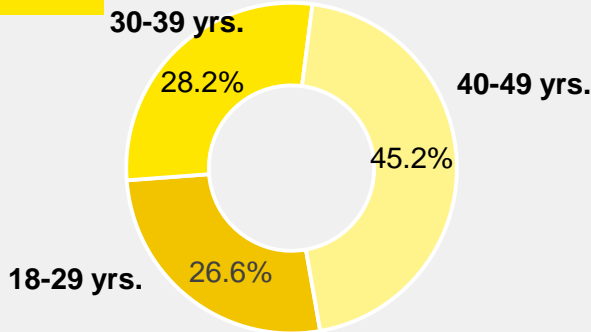
Matsumoto Kiyoshi Shopper

Remark: Based on Quota Sampling

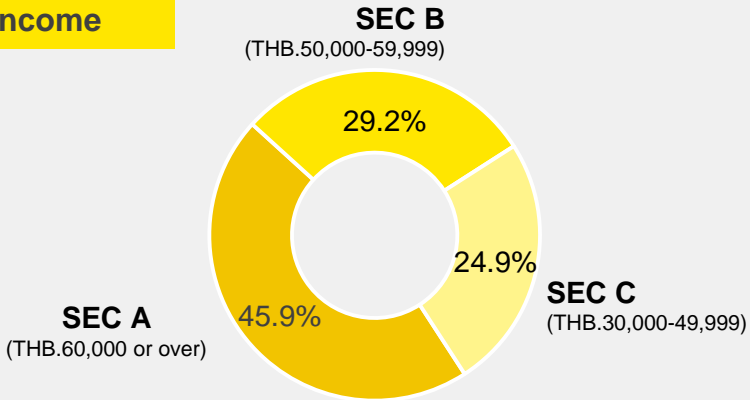
Gender



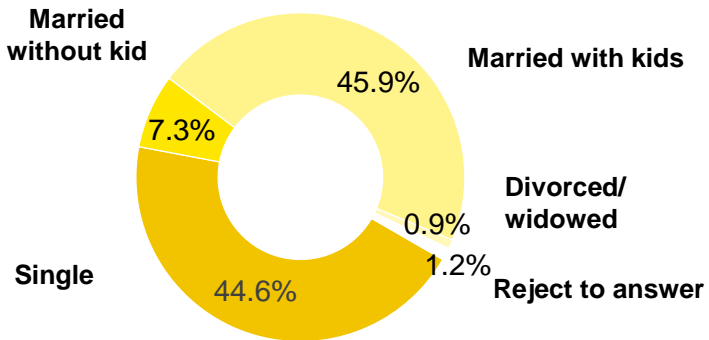
Age



HH Income



Marital Status

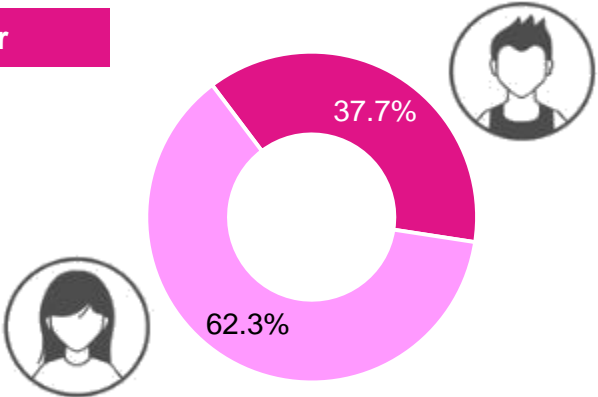


Base: Matsumoto Kiyoshi shopper 188 = 100%
 S2. Please choose your gender. (SA)
 S3. How old are you? (SA)
 S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
 Q20. Marital status (SA)

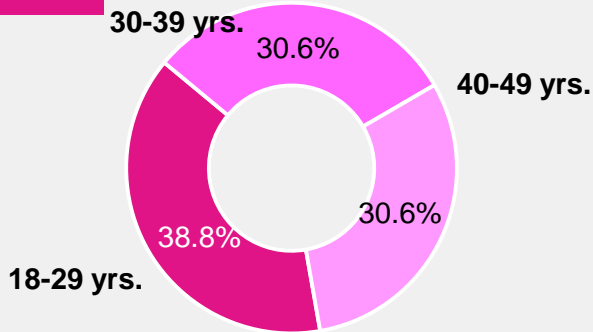
EVEANDBOY Shopper

Remark: Based on Quota Sampling

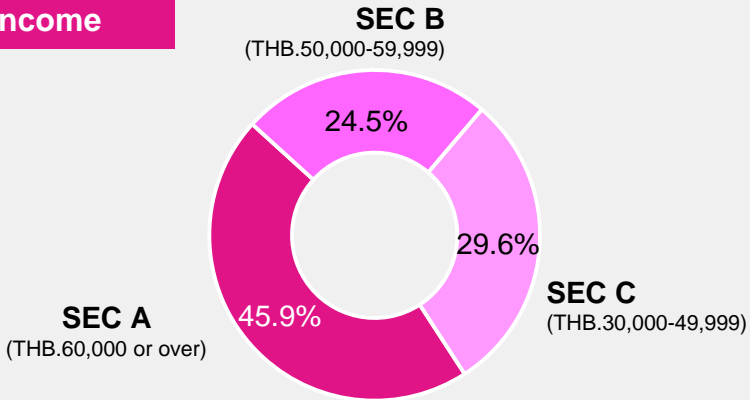
Gender



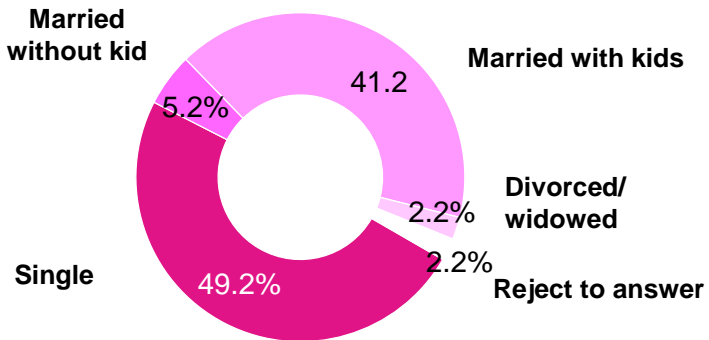
Age



HH Income



Marital Status

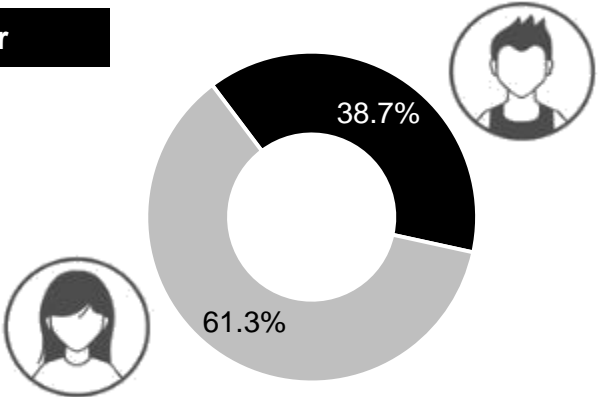


Base: EVEANDBOY shopper 201 = 100%
 S2. Please choose your gender. (SA)
 S3. How old are you? (SA)
 S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
 Q20. Marital status (SA)

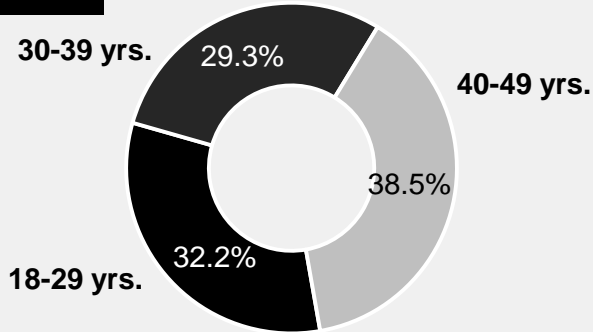
SEPHORA Shopper

Remark: Based on Quota Sampling

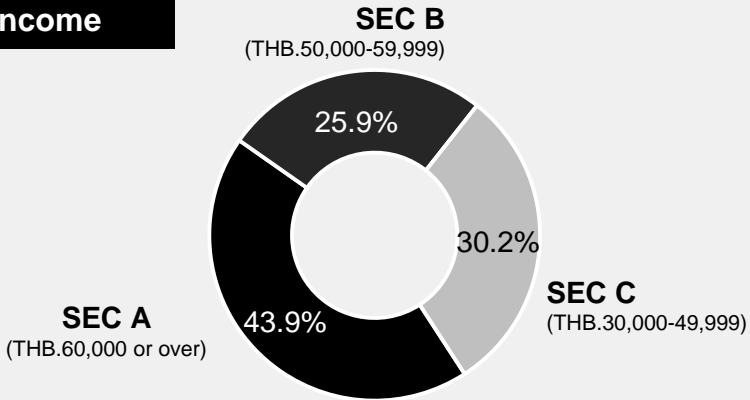
Gender



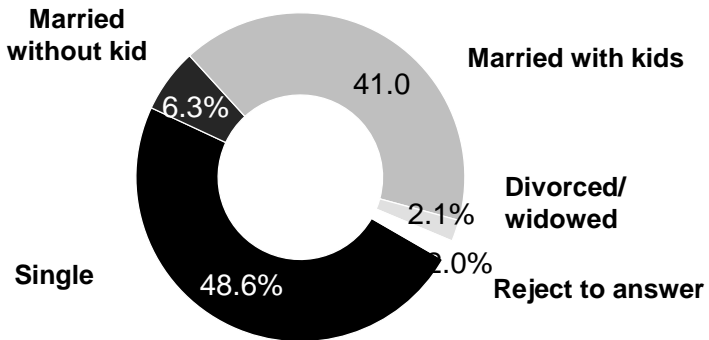
Age



HH Income



Marital Status



Base: Sephora shopper 127 = 100%
 S2. Please choose your gender. (SA)
 S3. How old are you? (SA)
 S6. Please choose your monthly household income. This includes income from all income sources; e.g. a pension, a rental fee, etc. (SA)
 Q20. Marital status (SA)

H&B Consumer Survey Design

Research objective	Grasp the Usage & Attitudes of each Health & Beauty store's shoppers in Thailand																												
Methodology	Online panel (Asia Mobile Panel)																												
Research Area	GBKK (Bangkok, Nonthaburi, Pathumthani, Samut Prakan)																												
Respondents' criteria	<ul style="list-style-type: none"> - Age: 18-49 - SEC A/B/C - Shopped at the particular H&B store at least 1 time per month 																												
Screening criteria	Those who and his/her family work in mass media, Advertisement, Research Company, and industry related to personal care products, drugs, supplements, health foods, cosmetics, grocery store/department store/Hypermarket/Supermarket/Minimart etc.																												
Sample size	<p>Total sample: n = 482</p> <p>*One respondent may go to more than one store</p> <ul style="list-style-type: none"> - Watsons: n = 340 - Boots: n = 443 - Tsuruha': n = 106 - Matsumoto Kiyoshi: n = 188 - EVEANDBOY: n = 201 - Sephora: n = 127 		<table border="1"> <thead> <tr> <th colspan="2"></th> <th>18-29</th> <th>30-39</th> <th>40-49</th> <th>Total</th> </tr> </thead> <tbody> <tr> <th>Men</th> <th>SEC A/B/C</th> <td>62</td> <td>89</td> <td>80</td> <td>231</td> </tr> <tr> <th>Women</th> <th>SEC A/B/C</th> <td>74</td> <td>82</td> <td>95</td> <td>251</td> </tr> <tr> <th colspan="2">Total</th> <td>136</td> <td>171</td> <td>175</td> <td>482</td> </tr> </tbody> </table>					18-29	30-39	40-49	Total	Men	SEC A/B/C	62	89	80	231	Women	SEC A/B/C	74	82	95	251	Total		136	171	175	482
		18-29	30-39	40-49	Total																								
Men	SEC A/B/C	62	89	80	231																								
Women	SEC A/B/C	74	82	95	251																								
Total		136	171	175	482																								
Date of Field Work	20 August - 1 September 2019																												
Interview length	20 minutes																												
Materials presented	Each Health & Beauty Store's logo (photo only)																												

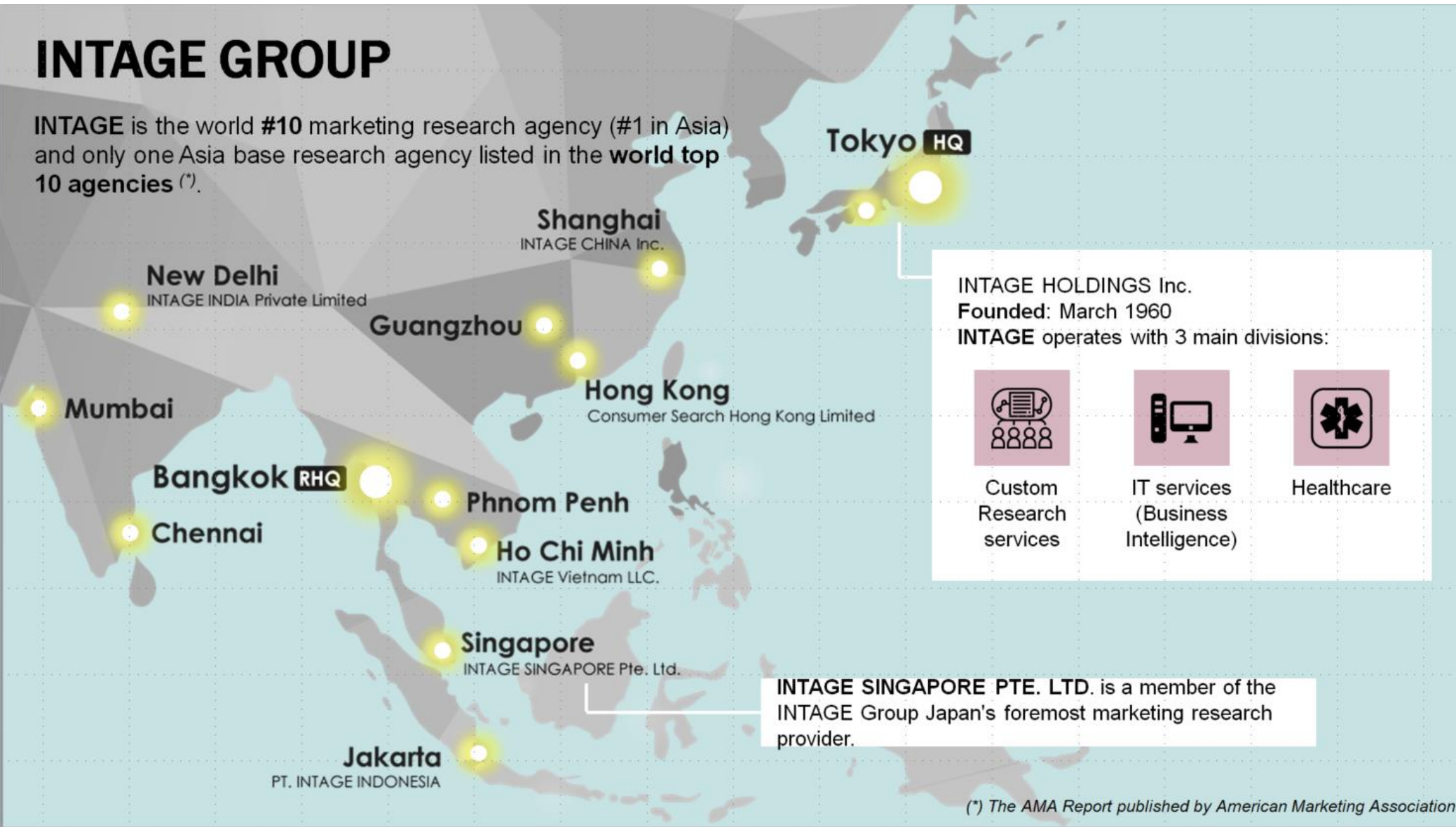


INTRODUCING OF




Asia Mobile Panel

INTAGE GROUP

INTAGE is the world **#10** marketing research agency (#1 in Asia) and only one Asia base research agency listed in the **world top 10 agencies** (*).



INTAGE HOLDINGS Inc.
Founded: March 1960
INTAGE operates with 3 main divisions:

-  Custom Research services
-  IT services (Business Intelligence)
-  Healthcare

INTAGE SINGAPORE PTE. LTD. is a member of the INTAGE Group Japan's foremost marketing research provider.

(*) The AMA Report published by American Marketing Association

CURRENT SITUATION of Overseas Online Research

01. Time consuming & high cost for all process in overseas research.

02 Current approaches cannot reach some specific groups & younger generation.

03. Smartphone usage is rapidly increasing within Asian region.

INTRODUCING Asia Mobile Panel (AMP)



Surveying “Anytime & Anywhere” with “**Fresh opinions**”



Fast & reasonable price for all process

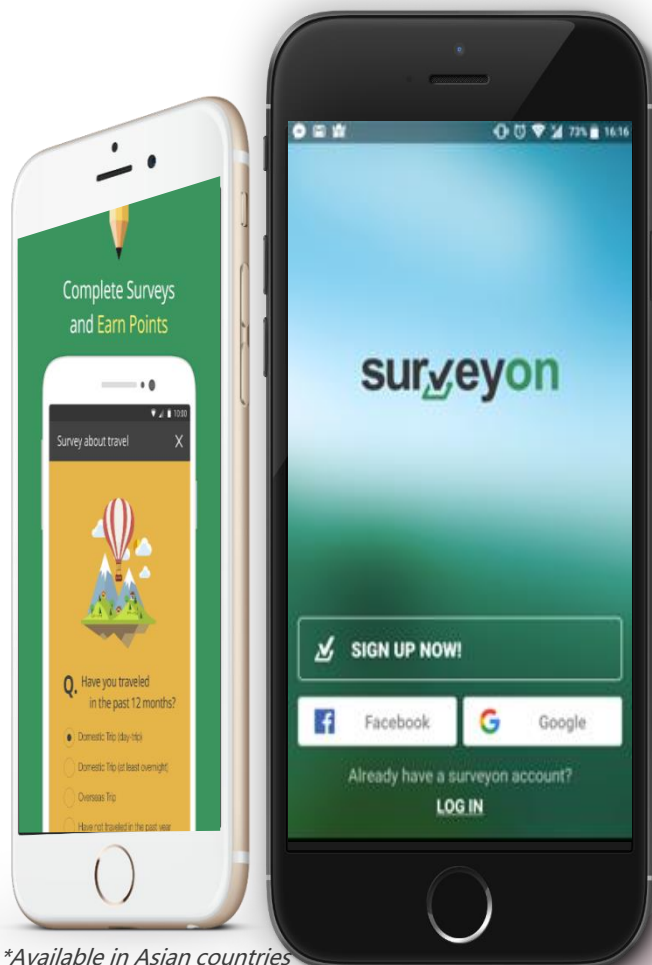


Easier to reach **younger generation** compared to PC panel



Easy to obtain **various information** (photo, video, etc.)

ASIA MOBILE PANEL specializes in **Smartphone** online surveys



*Available in Asian countries

<https://itunes.apple.com/jp/app/surveyon/id1115570407?mt=8>
<https://play.google.com/store/apps/details?id=com.d8aspring.surveyon&hl=ja>



A fun app that allows users to get surveyon point anytime/anywhere

Users answer surveys and get reward with surveyon points.

Able to enjoy point exchange services.

ASIA MOBILE PANEL SIZE

Asia Mobile Panel is expanding in Asia Region with INTAGE branch companies.
Total panel size is approximately 1,800,000 (as of September 2019)

480,000s

Indonesia

240,000s

Vietnam

230,000s

China

83,000s

Korea

52,000s

Malaysia

460,000s

Thailand

50,000s

Taiwan

29,000s

Singapore

5,000s

Hong Kong

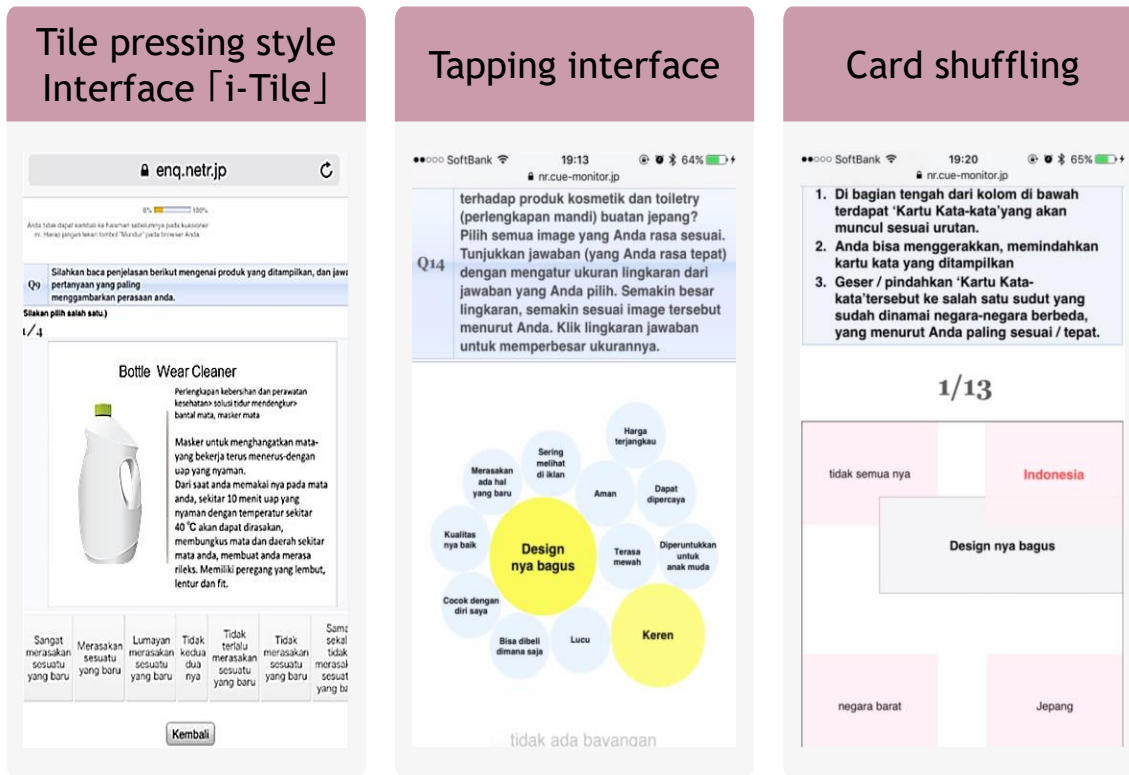
171,000s

Philippines



SPECIALIZED IN SMARTPHONE

- ✓ Friendly survey interface developed via INTAGE technology from Japan.



PANEL QUALITY MANAGEMENT



Block duplicate registrations

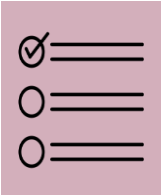
- Verify Mobile number & Email for the registration
- Limit registration for more than once registrations with OP/Device within 5 mins.
- Check login history, IP address, similarity of email address, specific sets of duplicate personal information (postcode, name, and date of birth)



Data reliability

- Tutorial Survey for newly registered panellists
- 47 detailed profiling questions updated at 1 month / 6 months / 12 month intervals
- Answer quality check - straight liners, speedsters, incomprehensible answers to open-ended questions and contradictory responses
- Alert email for bad samples and blacklisting the errant panellists after 3 flags

PANEL ACTIVITY MANAGEMENT BY LOYALTY PROGRAM



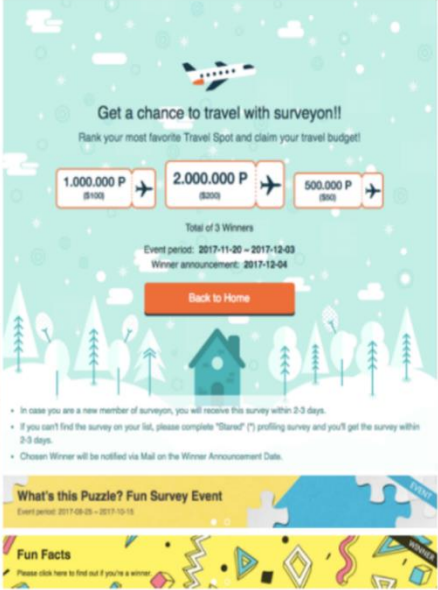
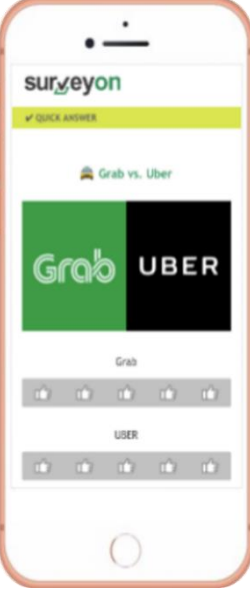
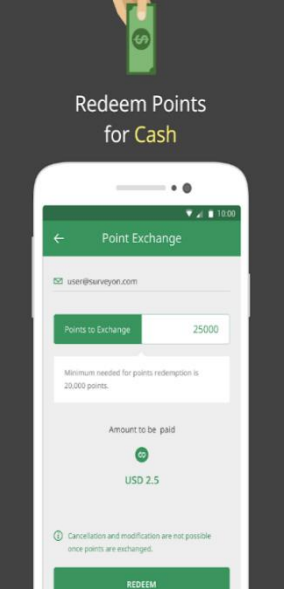
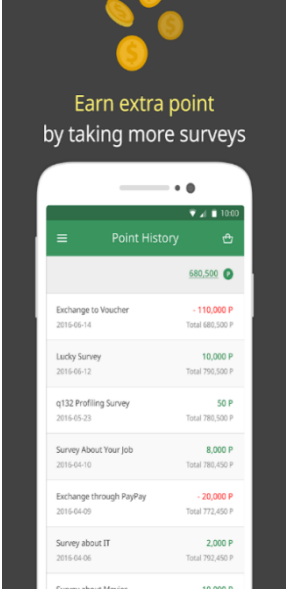
Daily Quickpoll:
Regular reward points every time you vote with quick poll



Daily Bonus:
1 simple question about the pictures



Monthly Event:
Fun topic with big reward points



DATA ANALYSIS PLATFORM FOR CLIENT



The DAP allows convenient, regular, real-time tracking of KPIs, helps visualize trends in your data and is customized to your data and specific business needs.



Live Survey Tracking

Continuous surveys give more depth to our insights & analysis, allowing real-time tracking of performance metrics for stores, chains or events.



Confusion to Clarity - Analyzing old data & monitoring new data

We can convert your data into an easy-to-understand format to derive clear insights & trends, track daily progress/KPIs with automatic updating via dashboards customized to your needs.

Contact us for more information



HWIYOUNG PARK



Business Development Manager and
Strategic Partnerships - APAC
hwiyoung-p@intage.com



HERRICK ONG



Data Analyst



Herrick-o@intage.com

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INTAGE SINGAPORE PTE. LTD.



<http://www.intage-singapore.com/>



105 Cecil Street, #18-14 The Octagon, Singapore 069534



THANK YOU



INTAGE (Thailand) Co., Ltd.