INFLUENCE OF MARKETING AND BRANDING ON IMPORTED FRESH FRUITS ON THAI CONSUMERS

BY

MR. WONGSAKORN CHATAMORNWONG

AN INDEPENDENT STUDY SUBMITTED IN PARTIAL FULFILLMENT OF
THE REQUIREMENTS FOR THE DEGREE OF
MASTER OF SCIENCE PROGRAM IN MARKETING
(INTERNATIONAL PROGRAM)
FACULTY OF COMMERCE AND ACCOUNTANCY
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ENTITLED

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was approved as partial fulfillment of the requirements for
the degree of Master of Science Program in Marketing (International Program)

on.......10 MAY 2018.......

Chairman ______________________
(Associate Professor James E. Nelson, Ph.D.)

Member and Advisor ______________________
(Professor K. Douglas Hoffman, Ph.D.)

Dean ______________________
(Associate Professor Pipop Udorn, Ph.D.)

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Author	Mr. Wongsakorn Chatamornwong
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Major Field/Faculty/University	Faculty of Commerce and Accountancy Thammasat University
Independent Study Advisor	Professor K. Douglas Hoffman, Ph.D.
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ABSTRACT

Fresh fruit consumption plays significant role in Thailand economy. Despite being one of the best origins for growing agricultural fresh produce, Thailand has been importing a lot of fresh fruits from other origins, particularly those varieties that are not available domestically due to climatic and geographical limitation.

Fresh fruits have always been perceived as commodity products, which means the price is purely driven by market or demand and supply situation. Consumers usually choose which products or brands to buy based solely on physical appearance.

However, due to the more widened information access across the globe, consumers have been changing. Their concerns about quality, safety and nutritional value of fresh fruits have been raised tremendously. Instead of looking only at the appearance, they also want to know how the fruits were grown, harvest, stored and packed.

To address the changing demand of consumer, fresh fruit producers began to implement marketing and branding on their products. Example of successful

producers is Dole and Del Monte, which are worldwide recognizable due to their presence in several product categories and countries.

This study aims to understand the factor or attribute influencing imported fresh fruit purchasing decision, particularly factor driven by brands and marketing. Data will be collected mainly by in-depth interview and survey questionnaire. The collected data will then be analyzed by SPSS. The research period is from October 1, 2017 to March 31, 2018.

Keywords: Fresh fruits, Fresh produce, Commodity

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Mr. Wongsakorn Chatamornwong

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CHAPTER 1
INTRODUCTION

1.1 Current Situation

Definition:

***Imported fresh produce**: Fruits and vegetables that are grown in other countries than Thailand and are brought into the country through importation.*

Traditionally, there were no distinct characteristics among each kind of fruit. Consumers made purchasing decision mainly on the freshness and appearance of fruits. Marketing and branding received little attention. One of the main reasons to explain this fact is that fresh fruit has high perishability. However, in recent years, fresh fruit marketing has gained more interest. Many international producers of fresh fruits from several origins emphasized more on branding fresh fruits to not only create awareness, but also pointing out its unique selling points in order to differentiate the brand from the rest in the industry.

Thailand has imported fresh fruits from other origins for several decades. In 2016 total imported fruits value into Thailand hits 683 million USD growing 10% from last year. The number is expected to grow even further in 2017. This represents 25% of total fresh fruits consumption, which is significant number considering how big the local production of fresh fruit in Thailand is (The International Trade Administration (ITA), U.S. Department of Commerce., 2017). In addition, the import tariff on fresh fruits from several origins have been reduced or waived through Government free trade agreement with many producing countries, which make fresh imported fruit more affordable to Thai consumers.

1.2 Research Objectives

1. To explore influence of branding on consumer attitude and belief toward imported fresh fruits

- To understand customer's decision making process from awareness to purchase both from consumer and reseller's point of view
- To explore difference between of attitude and belief among difference segment of consumers

2. To determine key attributes in imported fresh produces that Thai consumers look for and their level of importance

- To identify benefits that consumers look for
- To establish marketing mix that are important to customers

3. To identify key elements for effective communication

- To specify appropriate media for targeted customer segments
- To identify location and channel for promoting

This study helps to indicate an opportunity to apply marketing knowledge to enhance business in imported fresh produce industry in Thailand, which is commoditized industry, lacks apparent differentiation and driven almost purely by market price. The result from the study will provide consumer insight regarding perception on imported fresh produces, which will be useful for establishing business and marketing plan.

CHAPTER 2
REVIEW OF LITERATURE

2.1 Fresh Fruit Consumption in Asia-Pacific region

Fresh fruit consumption has been the second most prominent food consumption in Asia-Pacific region after Vegetable with 22% share of the total food consumption. Despite not being the largest type of food consumed in the region, the growth of spending on fresh fruits has been between 9% and 16% across 2009 to 2014, outnumbered spending on other food, meat and particularly vegetable by fair margin. (Kocheri, 2015)

In fact, Asia Pacific region play significant role in global fresh fruit market. In 2015, the region accounted for 68% of total consumption. One of main drivers for this is the growth of emerging market such as China, India and ASEAN countries. The total fresh fruit consumption in Thailand is 10 megatons in 2015 with period growth rate between 2010 and 2015 at 12%. Two of the top performing fruits that contributed to the regional growth are blueberries and cherries. During 2010 to 2015, blueberries and cherries consumption in Thailand have cumulative annual growth rate of 8% and 9% respectively (Malhotra R. , 2017)

It is forecasted that urban consumers, working women and singles in Asia Pacific will continue to grow. These groups have common traits of being time-constrained, and looking for convenience. Apart from these three segments, aging consumers are also expected to grow and become significant fraction of population. The portion of Thai aging population in 2015 was 15%, but is forecasted to be over 23% in 2025. This presents an opportunity for fresh fruits market as aging consumers usually look for nutritious food. Producers should not overlook the fact that aging consumers become more dependent on family members. Small detail such as easy-to-understand packaging label will be important attribute for this particular group of consumer as well. Another opportunity that lies in this region is from the concern of obesity. The portion of overweight population in most countries in the region has been increasing. For Thailand in specific, overweight population is expected to exceed 30% of total population by 2025. It is observed that the potential cause of this problem is linked with the consumption of processed food, which is convenient, but usually unhealthy. Fresh fruits producer can appeal this demographic segment by promoting healthy lifestyle and diet. (Malhotra, Fresh Fruits and Vegetables in Asia Pacific – Part 2, 2017)

2.2 Fresh Fruit Consumption in Thailand

Thai consumers perceive wet market as the channel to buy fresher and more economical fresh fruits than those available at modern retail outlets. However, consumer-purchasing habits gradually change to cater modern retail sectors, particularly for those who live in urban areas, allowing modern retail outlets to have been expanding and becoming competitive counterpart to traditional wet markets. Thai consumers have higher confidence in safety, quality and health attributes of product purchased from supermarket and specialty store. These are the main factors that drive consumers to purchase from this channel. The study has also shown that decision to purchase fresh produce from modern retail outlets depends on household income and education of household leader. To keep up with competition, traditional retailers need to improve consumer convenience, expanding assortment of products offering and take on safety and quality standards for fresh fruits. On the other hand, modern retailers need to pursue premium segment to capture high-class consumers (Lippe, 2010)

With the changes in demographic and purchasing habit, it is predicted that Thai consumers will look for food with improved nutrition, in smaller packs, convenient yet healthy benefit. More importantly, they will also consider producers' ethics and transparency of how produce is grown and sourced. Globally big players in produce industry also address this emerging need from consumers by providing detailed information about source on the label. Furthermore, the retail sector has innovated and become more than just physical store, allowing consumer to shop from home and get the fresh produce delivered right at their doorstep. There are increasing number of home delivery retailers such as Honestbee, Happyfresh and Uber eats. The home delivery service literally brings retailers and growers closer to consumers. (Malhotra, Fresh Fruits & Vegetables in Asia Pacific – Part 3, 2017)

Despite having big national consumption of fruits already, Thailand still has enormous potential growth for fresh fruits consumption even further. According to

The Department of Health, Thailand, the minimum recommended intake of fruits and vegetables to reduce risks of cancer and heart disease is 400 grams per day. However, 82% of Thai consumers consume fruits and vegetables less than recommendations. So, there is the national plan to increase produce consumption which includes public relations on benefits of produce consumption, establishing consumer network specifically on produce consumption and new law and policy implementation that cater toward more household's produce consumption. The Department of Health also emphasize that consumer should consider buying reliable brand when it comes to fresh fruits and vegetable as product safety is big concern. (Tongkhao, 2014)

The establishment of free trade agreement between Thailand and many producing countries opens up the door for imported fresh produce to grow as it become more affordable to wider range of consumers. For example, in November 2015, Thailand and Chile entered into free trade agreement of various kinds of products, including agricultural products. The import tariff on fresh fruits was gradually reduced annually to reach zero in 2018. (Sirikeratikul, 2015)

2.3 Branding and Promotion on Fresh Fruit

The need for branding is acknowledged by producers of fresh produces in many important producing countries. They have been building brand awareness through good use of marketing tools. For example, Eureka Blueberry is the new variety of Blueberry, which has superior flavor and crunchiness that suits Thai consumer's preference. Its brand awareness was successfully built among consumer though promotional activities at point of sales such as wholesale, retail and food service sector. The promotional activities include in-store demonstration, point of sale materials and selling competition across stores. (Matthew, 2017)

Many of the leading fruit brands around the globe have different approach to build the brand. For example, Zespri, Kiwifruits brand from New Zealand, was the pioneer in building brand and doing marketing campaign in Thailand. The key message that the brand consistently used was about superior nutritional value. Jazz and Envy apples used particular attribute of eating quality to be unique selling points. Jazz promoted refreshing sensation from eating an apple, whereas Envy promoted superior taste. Pink Lady apple, on the other hand, promoted overall eating quality (taste, texture, aroma, juiciness) as the key message to consumers. Apart from this there are many other leading brands, which used different properties of the fruits to promote to consumers.

In summary, the findings have shown that fresh fruits consumption is on the verge of becoming the most prominent fresh food in Thailand. Combining with changing consumer demographic, lifestyle and retailing landscape, it can be foreseed what consumers will be looking for from fresh fruits. Historically, branding and marketing weren't widely used in this industry in Thailand. So, there is no evidence of how will the branding and marketing influence fresh fruit consumers. This study aims to address this gap and deliver insightful information for this particular industry.

CHAPTER 3
RESEARCH METHODOLOGY

3.1 Exploratory Research

This approach aimed to explore general information about fresh fruits in Thailand, consumers' current perception on imported fresh fruits and awareness of fresh fruit brands.

3.1.1 Secondary Research

Information regarding industry overview, demographic of consumers were gathered from published sources available online such as Thailand's customs and department of foreign trade and department of commerce of country of origins (e.g. USA, New Zealand), fresh fruit-specific magazine, previous research and study relevant to this field and, industry news report.

3.1.2 In-dept interview

In-depth interviews were conducted on two major groups of respondents, which were imported fresh fruit consumers and traders. Consumers provided information regarding brand awareness, shopping habits, purchasing behaviors and attributes commonly used for making decision to purchase any particular brand of fresh fruits, whereas traders will provide information from reseller's point of view.

- To explore attributes of imported fruits that impact their purchasing decision and to examine if any brand awareness on imported fruits before designing questionnaire
- To explore purchasing decision from resellers' point of view

3.2 Descriptive Research

This research approach aimed to describe consumers in terms of their characteristics, attitudes toward fresh fruit brands. This research also evaluated an effectiveness of current communication of existing brands in the market.

3.2.1 Survey Questionnaire

The survey questionnaire was conducted online with a total of 255 respondents selected from the group of current consumers. The questionnaire length of time will be approximately 10 minutes

3.3 Data Collecting Procedure

3.3.1 Sampling Plan (sample size and recruiting plan)

Due to the time limitation, sample selection of each focus group and questionnaire was by convenient sampling.

3.3.1.1 In-depth interview

Consumers

Who to recruit? / Participant Requirements

- 27-51 years old
- Residents in Bangkok
- Consume imported fruits at least once a week
- Currently not working in fresh agricultural produce (fruits and vegetable) industry.

Where to recruit

- From office, fitness center or use personal connection

Traders/Resellers

Who to recruit? / Participant Requirements

- Wholesaler or reseller of imported fresh fruits

Where to recruit

- Pak Klong Talard fresh market and Talardthai market

3.3.1.2 Survey Questionnaire

Who to recruit? / Participant Requirements

- 18-65 years old
- Residents in Thailand
- SES: All socioeconomic classes

- Currently not working in fresh agricultural produce (fruits and vegetable) industry.

Where to recruit

- Through Facebook page with selective criteria per participant requirement.

3.4 Data Analysis Plan

The analysis from the data obtained from research was analyzed using the Statistical Package for the Social Sciences (SPSS) to identify statistical data, frequencies, analysis of variance and correlation between variables. Other statistical analysis was also used if appropriate.

3.4.1 Key Research Variables

Perceived quality attributes such as freshness, hygiene, safety are example of important independent variables. This study will check correlation between these attributes with dependent variables such as purchase intention and brand preference to understand the influence of each attribute.

Table 1: Example of independent variables and dependent variables

Independent variable (IV)	Dependent variable (DV)
1. Perceived quality	1. Purchase Intention
2. Demographic	2. Brand awareness

3.4.2 Dummy Table

Demographic information was collected and statistically analyzed to understand respondents' profile and behavior.

Table 2: Dummy Table

Characteristics	Data
1. Age (years)	Mean, Standard Deviation, Range
2. Gender	N% of each gender
3. Occupation	Housewife, Office worker, Freelance, Trainer, Unemployed
4. Purchase Location	Fresh market, Supermarket, Traditional retailers, Modern retailers

CHAPTER 4
RESULTS AND DISCUSSION

4.1 Consumer In-depth Interview

It was conducted October 25 and 26 on the total number of 4 interviewees who live in Bangkok and purchase imported fruits at least once a week. Three females (ages 27, 33, 51) and works as freelance trainer, office worker and housewife respectively. One male (age 29) and work in family business and does cross fit as hobby. The objectives are to explore attributes of imported fruits that impact their purchasing decision and to examine if any brand awareness on imported fruits before designing questionnaire.

4.1.1 Sample Results

- All four interviewees said that the quality and freshness of fruits at the point of purchase is the most important attribute.
- Two interviewees said that brand is not significant factor when buying imported fruits except for some categories which one brand outperforms others in term of availability and visibility to them.
- Three interviewees said that they exclusively buy imported fruits from a few if not one seller. Primary reason is confidence in seller's selection.

Problems

- Only one out of four interviewees recognize at least four out of six brands that were shown to them for checking awareness. This indicates that imported fruit brands are quite unknown.
- There are only two brands from six brands that all interviewees recognize. Both brands produced more than just imported fruits (e.g. dried fruits, canned fruits, local fruits, juice). It's difficult to justify if the awareness is due to imported fruits or other products.
- Interviewees recognize some brands, but do not know their proposition and what unique benefit those brands offer to consumers.

Solutions

- Reviewing the criteria for selecting brands to use in questionnaire.
- Showing the products picture associated with brand picture to respondents in questionnaire to ensure accuracy of respond is on brand of imported fruits.
- Conducting more in-depth interviews: (a) Passively find out more brands of imported fruits that Thai consumers are aware of. (b) Selecting different sample based on purchasing location to explore further on impact on purchasing decision from distribution channel. (c) Observing current behavior of consumer at the point of purchasing. (d) Interviewing reseller to obtain insight on brand from reseller's perspectives.

4.2 Traders or Resellers In-depth Interview

It was conducted November 25 on two purchasers or resellers recruited from wholesale market. Two purchasers recruited from wholesale market are male aged 41 years old and female aged 38 years old. The male is the reseller from fresh market in South Bangkok. The female is the juice shop owner. The objectives are to explore purchasing decision from resellers' point of view. The result will be analyzed together with previous interview on final consumers for designing questionnaire

4.2.1 Sample Results

- Both interviewees repeatedly purchase same brand if available, unless there is significant difference in price between one brand and another.
- One interviewee mentioned that the renowned brand tends to have more consistent quality. This makes it easy to resell to their customers.
- One interviewee said that the visual of products such as packaging, name, logo also has dramatic impact on their customer's purchasing decision.

Problems

- Many findings indicate that the purchasing decision is made by perceived attributes, which are difficult to quantify.
- Information about consumers obtained from the interviewees came from resellers not consumers themselves. It may not be accurate.

Solutions

- Classify perceived attributes into a group of few attributes, set up parameter for measuring their importance in questionnaire in order to quantify the result.
- Validate the claims about consumers obtained from resellers.

4.3 Survey Questionnaire

4.3.1 Respondents Profile

The survey questionnaire was conducted online from 8 to 22 January 2018 with total respondent of 255 respondents. However, only 181 respondents completed the questionnaire. To qualify, respondents were required to regularly consuming imported fresh fruits at least once a month. As a result, 34 respondents were abandoned because their consumption is not frequent enough to provide justifiable answers to the survey questions.

The consumption frequency of 181 respondents was classified into five frequency; less than once a month, once a month, once a week, more than once a week and everyday.

Table 3: Brand consumption frequency of respondents

Consumption frequency	n	Percentage
Less than once a month	34	19%
Once a month	62	34%
Once a week	35	19%
More than once a week	43	24%
Everyday	7	4%
Total	181	100%

Age: average age of respondents are 34.86 years old. The oldest age is 64 years old, while the youngest is 18 years old. The standard deviation is 10.80 years. Majority of respondents' age were between 18 to 30 years old. The number of respondents in each age range is illustrated in table below.

Table 4: Age range of respondents

Age range	n
18-30	73
31-40	33
41-50	26
51-60	12
61-65	3

Gender: 72% of respondents are female and 28% of respondents are male.

Occupation: Majority of respondents are office workers, followed by housewife, business owner and students.

Table 5: Occupation of respondents

Occupation	n	Percentage
Housewife	21	14%
Office workers	58	39%
Students	16	11%
Business owner	18	12%
Unemployed	9	6%
Others	25	17%

Purchasing Habit: 71% of respondents purchase imported fresh fruits by themselves. The other 29% have other purchase for them, which are mostly by family members (91%). The most common channel that respondents bought imported fresh fruits from are Supermarket (85%), follow by Hypermarket and Fresh market.

Table 6: Purchasing channels of respondents

Channel	n	Percentage
Supermarket	88	85%
Hypermarket	39	38%
Fresh market	25	24%
Wholesale market	8	8%
Online shop	8	8%
Other channels	3	3%

4.3.2 Brand Awareness

There were nine brands that were asked about awareness in the questionnaire. These are the nine brands that were mentioned at least by two respondents during in-depth interview.

There were 140 respondents who recognize at least one brand. Only five respondents recognize eight brands. None recognizes all nine brands.

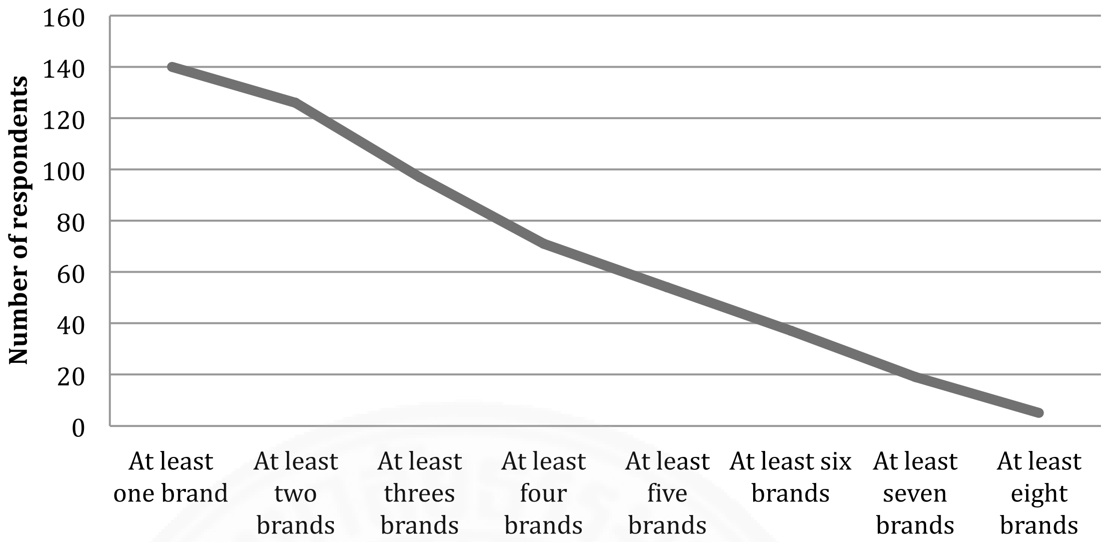

Figure 1: Number of respondents recognizing at least one brand to eight brands

Dole is the top brand when it comes to awareness with 78%. Cityfresh and Zespri come in at second and third place with 53% and 52% awareness respectively.

Table 7: Brand awareness

Brand	**n**	**%**
Zespri	76	52%
Pink Lady	50	34%
Jazz	53	36%
Envy	67	46%
Cityfresh	78	53%
Dole	115	***78%***
Driscoll's	30	20%
Sunkist	73	50%
Avanza	7	***5%***

The method of how respondents get introduced to the brands vary from respondents to respondents. There are four key methods which are seeing at point of sale, touching through media, receiving friends' recommendation and being given by other people. The most common one for all brands are seeing the brand at the point of sales, which account to more than 80% of most brands. Zespri and Jazz performed well in media as there is over 25% of awareness obtained through this channel.

However, the respondents' awareness is verified by ability to identify the type(s) of fruits that each brand offers. The respondents who are able to correctly identify the type of fruits have "true awareness" of the brand.

Table 8: True brand awareness

Brand	**n**	**%**
Zespri	66	45%
Pink Lady	39	27%
Jazz	46	31%
Envy	59	40%
Cityfresh	73	50%
Dole	78	***53%***
Driscoll's	30	20%
Sunkist	68	46%
Avanza	3	***2%***

By comparing the awareness with true awareness, we found out that despite having the highest awareness among respondents, Dole received considerably lower true awareness, meaning that many respondents do not have complete knowledge about what kind of fruit(s) Dole offers. On the other hands, all respondents who recognize Driscoll's are fully aware of types of fruit that the brand offers.

Table 9: Difference between awareness and true awareness of each brand

Brand	Awareness	True Awareness	Difference
Zespri	52%	45%	7%
Pink Lady	34%	27%	7%
Jazz	36%	31%	5%
Envy	46%	40%	5%
Cityfresh	53%	50%	3%
Dole	78%	53%	***25%***
Driscoll's	20%	20%	***0%***
Sunkist	50%	46%	3%
Avanza	5%	2%	3%

4.3.3 Brand Consumption

Out of the respondents with true awareness, Avanza and Zespri hold the highest consumption with over 90% conversion rate to consumption, whereas Cityfresh has the lowest conversion rate.

Table 10: Brand consumption and conversion rate from awareness

Brand	Frequency	Conversion rate%
Zespri	62	***94%***
Pink Lady	33	85%
Jazz	40	87%
Envy	53	90%
Cityfresh	57	***78%***
Dole	78	100%
Driscoll's	26	87%
Sunkist	56	82%
Avanza	3	***100%***

4.3.4 Important Attributes

There are four key attributes that influence purchasing decision of imported fresh fruits; freshness, nutritional level, appearance and safety of the product. These were obtained from in-depth interview. These factors are quantified through survey questionnaire. Mean score indicates the level of importance of each attribute. Freshness is the most important attributes among 147 respondents. The score is in the scale of four. According to the result, the most important attribute is freshness with the highest mean score (3.77), followed by Safety (3.59) and Nutritional Value (3.29). The least important attribute is Appearance (3.11).

Table 11: Important attributes

Attributes	**Mean**	**Standard Deviation**
Freshness	3.77	0.42
Nutritional value	3.29	0.63
Appearance	3.11	0.7
Safety	3.59	0.56

4.3.4.1 Correlation

Among the four attributes, there are four pairs of positive correlation; Freshness and Safety, Nutritional value and Appearance, Nutritional value and Safety, Appearance and Safety.

Table 12: Correlation between attributes

		Freshness	Nutritional value	Appearance	Safety
Freshness	Pearson Correlation	1	0.05	0.131	.207*
	Sig. (2-tailed)		0.549	0.113	0.012
	N	147	147	147	147
Nutritional value	Pearson Correlation	0.05	1	.251**	.379**
	Sig. (2-tailed)	0.549		0.002	0
	N	147	147	147	147
Appearance	Pearson Correlation	0.131	.251**	1	.219**
	Sig. (2-tailed)	0.113	0.002		0.008
	N	147	147	147	147
Safety	Pearson Correlation	.207*	.379**	.219**	1
	Sig. (2-tailed)	0.012	0	0.008	
	N	147	147	147	147

* Correlation is significant at the 0.05 level (2-tailed).

** Correlation is significant at the 0.01 level (2-tailed).

4.3.5 Segmentation

We can segment respondents into two groups by using cluster analysis in SPSS on score of each attribute given by individual respondent. As a result of cluster analysis, there are two segments of respondents, casual consumers and health-conscious consumers.

Cluster/Segment	n	Percentage
Casual consumers	101	69%
Health-conscious consumers	46	31%

Both segments similarly consider importance of freshness and safety. The distinct differences between the two are nutritional value and appearance.

Casual consumers consider the appearance of fresh fruits relatively more than health-conscious consumers. On the other hand, health-conscious consumers concern about nutritional value considerably more than casual consumers.

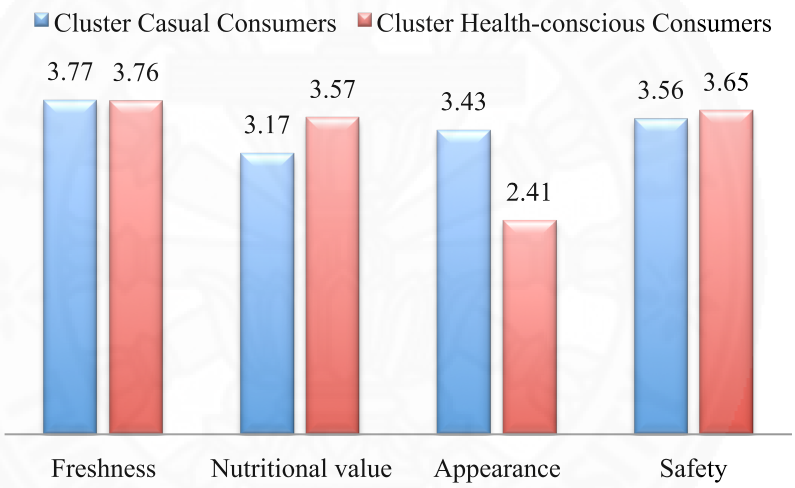

Figure 2: Important attributes by segments

One-way ANOVA was used to test if there was statistically significant difference between the two segments on level of importance given to nutritional value and appearance. The result of nutritional value and appearance were statistically significant.

Table 13: ANOVA table – difference on important attributes by segments

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Freshness	Between Groups	0.004	1	0.004	0.023	0.88
	Within Groups	26.132	145	0.18		
	Total	26.136	146			
Nutritional value	Between Groups	4.979	1	4.979	13.508	0
	Within Groups	53.443	145	0.369		
	Total	58.422	146			
Appearance	Between Groups	32.413	1	32.413	117.954	0
	Within Groups	39.845	145	0.275		
	Total	72.259	146			
Safety	Between Groups	0.244	1	0.244	0.781	0.378
	Within Groups	45.266	145	0.312		
	Total	45.51	146			

4.3.5.1 Lifestyle of Segments

Lifestyle is defined by activities that respondents like to do as hobby. Browsing internet is the most common activities with 73% and 85% for causal consumers and health-conscious consumers respectively. Some of the notable differences between two groups are cooking, reading books, exercise and café hopping.

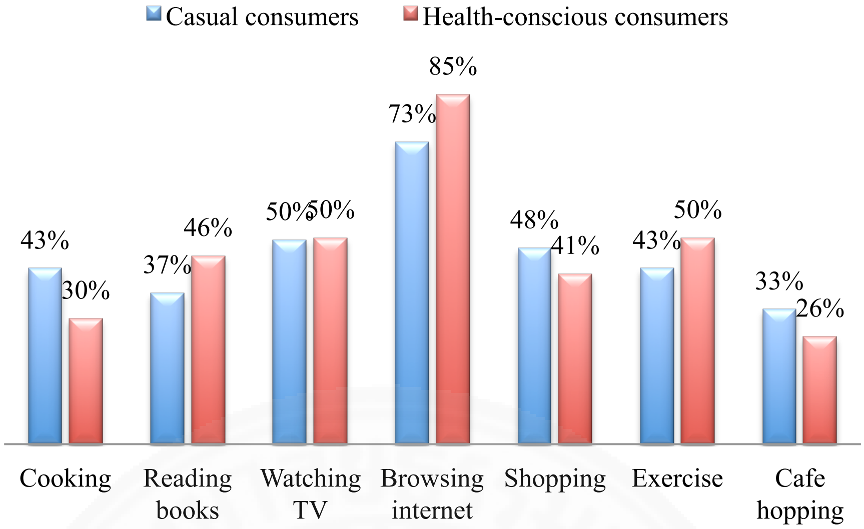

Figure 3: Hobby by segments

4.3.5.2 Purchase Locations of each segment

The main purchase locations of both segments are supermarket. However, most casual consumers purchase from several channels, while health-conscious consumers purchase from single location.

Table 14: Purchase location of each segment

Purchase Location	Casual Consumers	Health-conscious Consumers
Purchase from fresh market	24%	13%
Purchase from wholesale market	9%	3%
Purchase from supermarket	87%	45%
Purchase from hypermarket	39%	19%
Purchase from online shop	9%	3%

4.3.6 Perceived Quality of The Brands

The brands' perceived quality is measured by the score (scale of four) of the five quality attributes given by the consumers of each brand, which are freshness, nutritional value, appearance, safety and deliciousness. Deliciousness is added into the equation because this is the score from the respondents who have experience consuming fruits from the specific brand. The results of each brand are illustrated in bar chart below. Avanza was removed from this analysis due to insufficient samples that are aware of the brand.

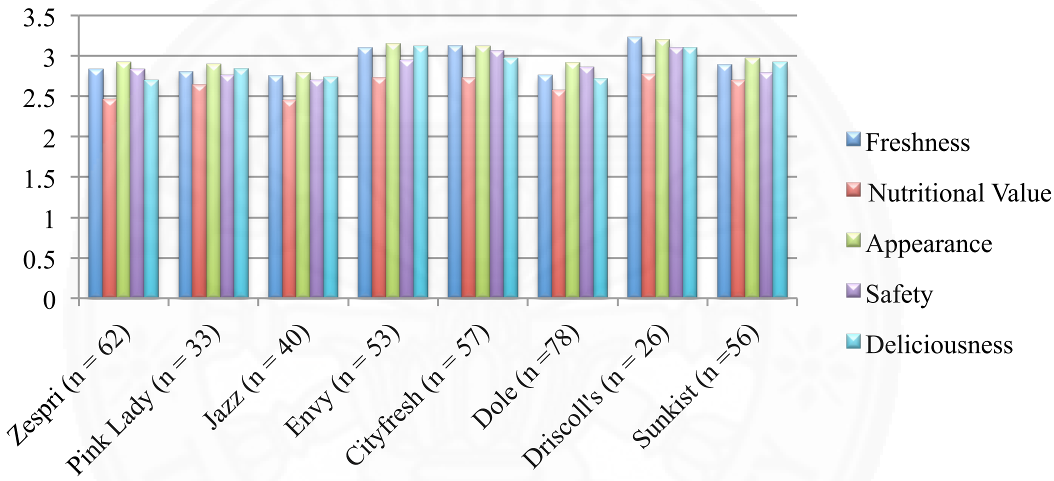

Figure 4: Perceived quality of each brand

The three brands with the highest overall score are Driscoll's, Envy and Cityfresh which have at least three attributes with score higher than 3.0. Among all brands, nutritional value is the attribute with the lowest score, which indicates that none of these brands stand out in term of providing superior nutritional value than others.

4.3.6.1 Perceived Quality by Segments

When looking at each perceived quality of each brand by segment, there are several differences. Table below illustrate perceived quality of each segment on each brand.

Table 15: Perceived quality by segments

Brand	Attribute	Segment	
		Casual consumers	Health-conscious consumers
Zespri	Freshness	2.86	2.76
	Nutritional Value	2.53	2.32
	Appearance	2.96	2.84
	Safety	2.88	2.72
	Deliciousness	2.78	2.52
Pink Lady	Freshness	2.86	2.67
	Nutritional Value	2.71	2.47
	Appearance	2.97	2.73
	Safety	2.83	2.6
	Deliciousness	2.83	2.87
Jazz	Freshness	2.78	2.71
	Nutritional Value	2.53	2.29
	Appearance	2.83	2.71
	Safety	2.81	2.47
	Deliciousness	2.78	2.65
Envy	Freshness	3.22	2.86
	Nutritional Value	2.83	2.52
	Appearance	3.2	3.05
	Safety	3.02	2.76
	Deliciousness	3.26	2.81
Cityfresh	Freshness	3.17	3
	Nutritional Value	2.76	2.63
	Appearance	3.12	3.11
	Safety	3.14	2.84
	Deliciousness	2.98	2.95

Dole	Freshness	2.77	2.71
	Nutritional Value	2.58	2.55
	Appearance	2.92	2.9
	Safety	2.89	2.77
	Deliciousness	2.75	2.61
Driscoll's	Freshness	3.29	3
	Nutritional Value	2.83	2.5
	Appearance	3.29	2.83
	Safety	3.17	2.83
	Deliciousness	3.21	2.67
Sunkist	Freshness	2.89	2.89
	Nutritional Value	2.73	2.61
	Appearance	3	2.89
	Safety	2.85	2.61
	Deliciousness	2.93	2.89

One-way ANOVA was used to find out which differences are statistically significant. Zespri, Jazz and Envy are the three brands which perceived quality of the two segments on certain attributes are statistically significantly different.

Zespri → Deliciousness

Jazz → Safety

Envy → Freshness and Deliciousness

Table 16: ANOVA table – difference in perceived quality by segments

Anova		Sum of Squares	df	Mean Square	F	Sig.
Zespri is delicious	Between Groups	1.172	1	1.172	4.156	*0.045
	Within Groups	20.867	74	0.282		
	Total	22.039	75			

Jazz is safe	Between Groups	1.296	1	1.296	5.565	*0.022
	Within Groups	11.874	51	0.233		
	Total	13.17	52			
Envy is fresh	Between Groups	1.871	1	1.871	5.963	*0.017
	Within Groups	20.398	65	0.314		
	Total	22.269	66			
Envy is delicious	Between Groups	2.937	1	2.937	5.946	*0.017
	Within Groups	32.108	65	0.494		
	Total	35.045	66			

4.3.7 Purchase Intention

The respondents provided purchase intention of the brands they had experience consuming from scale of one to five. The result is illustrated in bar chart below.

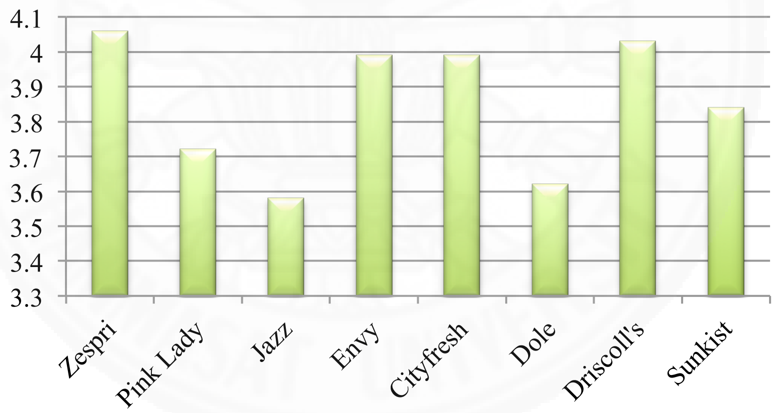

Figure 5: Brands' purchase intention

Zespri, Driscoll's, Envy and Cityfresh received high purchase intention from their consumers relatively to the other brands. Among all eight brands, Jazz has the lowest purchase intention.

By comparing between the two segments, casual consumers have higher purchase intention in almost every brand, except Sunkist.

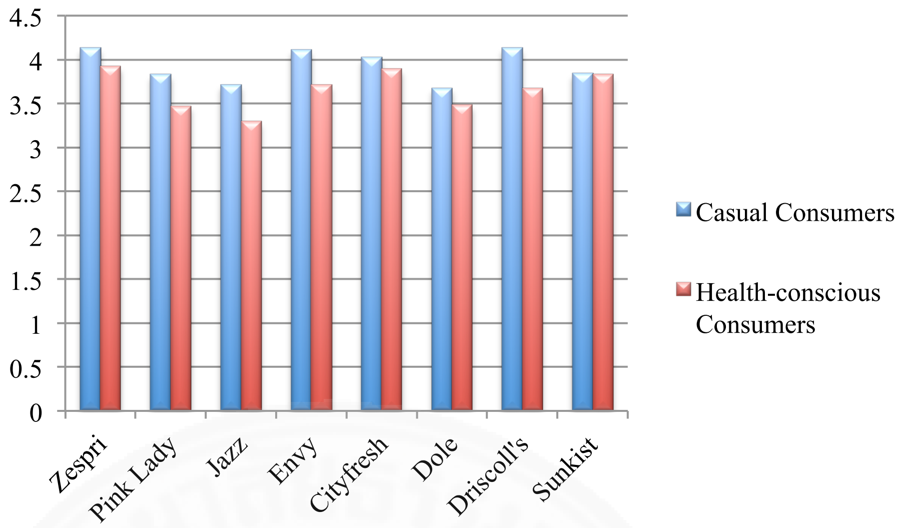

Figure 6: Brands' purchase intention by segment

In order to know which attributes or factors have an effect on purchase intention of each brand, linear regression is used to test significant level.

The result came out that each individual brand has different predictors or significant factors that affect purchase intention. Zespri, however, had high purchase intention among all eight brands, but the current information is not sufficient to identify which factors significantly affect purchase intention of this brand.

Brand's Purchase Intention	**Predictor(s)**
Zespri	-
Pink Lady	Appearance, Safety
Jazz	Freshness
Envy	Freshness, Safety
Cityfresh	Freshness, Nutritional Value, Appearance
Dole	Freshness, Safety
Driscoll's	Deliciousness
Sunkist	Freshness, Appearance, Safety

4.3.8 Media

Point of sale is the dominant media channel to reach consumers with outnumbered other media by big margin. Apart from point of sale, Jazz, Dole and Sunkist have relatively reach consumers through television than other brands with more than 10% of respondents saw the advertisement.

Another notable channel is Facebook which Cityfresh, Zespri and Pink Lady receive high reaches with 51%, 17% and 16% respectively which implies that these three brands emphasize on promoting on this channel more than other brands.

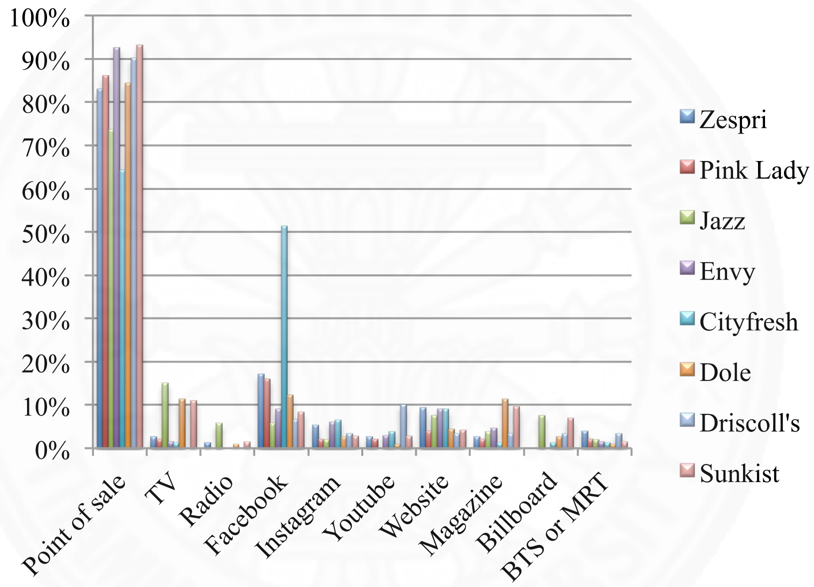

Figure 7: Media exposure by each brand's consumers

CHAPTER 5
CONCLUSIONS AND RECOMMENDATIONS

5.1 Conclusion and Recommendations

5.1.1 Influence of Branding and Marketing on Perceived Quality

According to research result, branding of imported fresh fruits create recognition to consumers. Despite being commodity product, many fresh fruit brands received more than 50% awareness from respondents. However, some brands failed to acknowledge customers what products they offer. These brands need to enhance its identity in its communication to eliminate this problem and obtain true awareness from customers. The result also shows that the conversion from awareness to consumption is high with 80% or more in all brands. Therefore, it can be concluded that consumers are likely to buy the products once they have awareness of the brand.

However, an influence on consumers' perceived quality is not significant. It is found that important factors for purchase intention of each brand do not match with the message each brand delivered.

Brands	Focused Attributes in Brand Communication	Significant Attributes from Regression
Zespri	Nutritional Value	-
Pink Lady	Deliciousness	Appearance & Safety
Jazz	Deliciousness	Freshness
Envy	Deliciousness	Freshness & Safety
Cityfresh	Freshness	Freshness, Nutritional Value, Appearance
Dole	Nutritional Value	Freshness & Safety
Driscoll's	Freshness, Deliciousness	Deliciousness
Sunkist	-	Freshness & Appearance & Safety

This mismatching indicates that some brands did not promote on the attributes that get customers to buy the products.

5.1.2 Key Attributes for Targeting

The key attributes of each of the two segments differ. Casual consumers require good appearance product, where Health-conscious consumers do not require at the same level, but look for nutritional benefits instead. Therefore, the brands can target the consumers who look for attributes that fit with what the brands offer. Pink Lady and Sunkist can target casual consumers because appearance is an important attribute of the brands. However, Cityfresh can target either one of the two segments because this brand has both nutritional value and freshness as important attributes.

5.1.3 Key Elements for Effective Communication

To effectively obtain casual consumers, whose appearance of the fruits is important, the brand communication should be emphasizing on the beauty of the fruits, showing attractive pictures. An example of recommended brand communication is in **Appendix D**. On the other hand, health-conscious consumers should emphasize on providing nutritional benefits of fruits. An example of recommended brand communication is in **Appendix E**.

5.2 Research Limitations

Branding on fresh fruits is new for Thai consumers. Many consumers, despite having awareness of the brands, admitted that brand is not important factors for their purchase decision. Therefore, the attribute score obtained from the research are not purely perceived quality but from the experience of consuming the products. As a result of this, the key attributes of each brand in consumers' perspective are different from the brands' perspective.

Some of the brands in this research offer several product categories that lead to inconsistency information from respondents if they know the brands for different kinds of product categories.

As a result of this, many respondents struggle to provide information about what brands did they consider or evaluate for purchasing, making the decision making process obtained from this research lackluster.

5.2 Suggestion for Future Research

The sampling method can be changed to probability sampling to enhance accuracy of result and narrow down the respondents to those who consider brands as important attributes when purchasing fresh fruits. These respondents are potentially more capable to give quality information than those who do not consider brands.

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APPENDICES

APPENDIX A
Current Brands' communication

Zespri's brand communication

Pink Lady's brand communication

Jazz's brand commnication

Envy's brand communication

APPENDIX B

ANOVA table of brand's perceived quality by segments

Anova		Sum of Squares	df	Mean Square	F	Sig.
Zespri is fresh	Between Groups	0.177	1	0.177	0.705	0.404
	Within Groups	18.599	74	0.251		
	Total	18.776	75			
Zespri is nutritious	Between Groups	0.736	1	0.736	1.806	0.183
	Within Groups	30.146	74	0.407		
	Total	30.882	75			
Zespri is good-looking	Between Groups	0.245	1	0.245	0.851	0.359
	Within Groups	21.282	74	0.288		
	Total	21.526	75			
Zespri is safe	Between Groups	0.442	1	0.442	1.155	0.286
	Within Groups	28.334	74	0.383		
	Total	28.776	75			
Zespri is delicious	*Between Groups*	*1.172*	*1*	*1.172*	*4.156*	**0.045*
	Within Groups	*20.867*	*74*	*0.282*		
	Total	*22.039*	*75*			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Pink Lady is fresh	Between Groups	0.381	1	0.381	0.932	0.339
	Within Groups	19.619	48	0.409		
	Total	20	49			
Pink Lady is nutritious	Between Groups	0.644	1	0.644	1.242	0.271
	Within Groups	24.876	48	0.518		
	Total	25.52	49			
Pink Lady is delicious	Between Groups	0.015	1	0.015	0.025	0.874
	Within Groups	28.705	48	0.598		
	Total	28.72	49			
Pink Lady is good-looking	Between Groups	0.595	1	0.595	1.304	0.259
	Within Groups	21.905	48	0.456		
	Total	22.5	49			
Pink Lady is safe	*Between Groups*	*0.549*	*1*	*0.549*	*1.418*	*0.24*
	Within Groups	*18.571*	*48*	*0.387*		
	Total	*19.12*	*49*			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Jazz is fresh	Between Groups	0.06	1	0.06	0.193	0.662
	Within Groups	15.752	51	0.309		
	Total	15.811	52			
Jazz is nutritious	Between Groups	0.63	1	0.63	1.429	0.237
	Within Groups	22.502	51	0.441		
	Total	23.132	52			
Jazz is good-looking	Between Groups	0.188	1	0.188	0.516	0.476
	Within Groups	18.529	51	0.363		
	Total	18.717	52			
Jazz is safe	Between Groups	1.296	1	1.296	5.565	0.022
	Within Groups	11.874	51	0.233		
	Total	13.17	52			
Jazz is delicious	*Between Groups*	*0.197*	*1*	*0.197*	*0.501*	*0.482*
	Within Groups	*20.105*	*51*	*0.394*		
	Total	*20.302*	*52*			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Envy is fresh	Between Groups	1.871	1	1.871	5.963	0.017
	Within Groups	20.398	65	0.314		
	Total	22.269	66			
Envy is nutritious	Between Groups	1.317	1	1.317	2.689	0.106
	Within Groups	31.847	65	0.49		
	Total	33.164	66			
Envy is good-looking	Between Groups	0.316	1	0.316	0.784	0.379
	Within Groups	26.192	65	0.403		
	Total	26.507	66			
Envy is safe	Between Groups	0.973	1	0.973	2.198	0.143
	Within Groups	28.788	65	0.443		
	Total	29.761	66			
Envy is delicious	*Between Groups*	*2.937*	*1*	*2.937*	*5.946*	*0.017*
	Within Groups	*32.108*	*65*	*0.494*		
	Total	*35.045*	*66*			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Cityfresh is fresh	Between Groups	0.413	1	0.413	1.193	0.278
	Within Groups	26.305	76	0.346		
	Total	26.718	77			
Cityfresh is nutritious	Between Groups	0.247	1	0.247	0.506	0.479
	Within Groups	37.099	76	0.488		
	Total	37.346	77			
Cityfresh is good-looking	Between Groups	0.003	1	0.003	0.008	0.928
	Within Groups	23.959	76	0.315		
	Total	23.962	77			
Cityfresh is safe	Between Groups	1.238	1	1.238	3.698	0.058
	Within Groups	25.442	76	0.335		
	Total	26.679	77			
Cityfresh is delicious	Between Groups	0.018	1	0.018	0.044	0.835
	Within Groups	31.93	76	0.42		
	Total	31.949	77			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Dole is fresh	Between Groups	0.093	1	0.093	0.214	0.644
	Within Groups	49.089	113	0.434		
	Total	49.183	114			
Dole is nutritious	Between Groups	0.028	1	0.028	0.062	0.803
	Within Groups	50.094	113	0.443		
	Total	50.122	114			
Dole is good-looking	Between Groups	0.004	1	0.004	0.011	0.916
	Within Groups	41.126	113	0.364		
	Total	41.13	114			
Dole is safe	Between Groups	0.319	1	0.319	0.759	0.385
	Within Groups	47.455	113	0.42		
	Total	47.774	114			
Dole is delicious	Between Groups	0.426	1	0.426	1.116	0.293
	Within Groups	43.105	113	0.381		
	Total	43.53	114			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Driscoll's is fresh	Between Groups	0.408	1	0.408	1.043	0.316
	Within Groups	10.958	28	0.391		
	Total	11.367	29			
Driscoll's is nutritious	Between Groups	0.533	1	0.533	0.793	0.381
	Within Groups	18.833	28	0.673		
	Total	19.367	29			
Driscoll's is good-looking	Between Groups	1.008	1	1.008	2.883	0.101
	Within Groups	9.792	28	0.35		
	Total	10.8	29			
Driscoll's is safe	Between Groups	0.533	1	0.533	1.054	0.313
	Within Groups	14.167	28	0.506		
	Total	14.7	29			
Driscoll's is delicious	Between Groups	1.408	1	1.408	3.492	0.072
	Within Groups	11.292	28	0.403		
	Total	12.7	29			

ANOVA		Sum of Squares	df	Mean Square	F	Sig.
Sunkist is fresh	Between Groups	0	1	0	0	0.99
	Within Groups	27.123	71	0.382		
	Total	27.123	72			
Sunkist is nutritious	Between Groups	0.183	1	0.183	0.391	0.534
	Within Groups	33.187	71	0.467		
	Total	33.37	72			
Sunkist is good-looking	Between Groups	0.167	1	0.167	0.461	0.499
	Within Groups	25.778	71	0.363		
	Total	25.945	72			
Sunkist is safe	Between Groups	0.804	1	0.804	2.104	0.151
	Within Groups	27.114	71	0.382		
	Total	27.918	72			
Sunkist is delicious	Between Groups	0.02	1	0.02	0.052	0.821
	Within Groups	27.487	71	0.387		
	Total	27.507	72			

APPENDIX C

Questions in Survey Questionnaire

1. Do you consume fresh fruits?
a) Yes
b) No

2. How frequent do you consumer?
a) Less than once a month
b) Once a month
c) Once a week
d) More than once a week

3. Do you buy fresh fruit by yourself
a) Yes
b) No

4. Where do you buy fresh fruits
a) Fresh market
b) Wholesale market
c) Supermarket (e.g. Pakklong Talard, Talardthai)
d) Hypermarket (e.g. Tesco Lotus, Big C, Makro)
e) Online shop
f) Others (Please specify)…...

5. Who purchase fresh fruits for you?
a) Family members
b) Friends
c) Others (Please specify).......

6. Have you ever seen these brands (Can answer more than one)
a) Zespri

b) Pink Lady
c) Jazz
d) Envy
e) CityFresh
f) Dole
g) Driscoll's
h) Sunkist
i) Avanza

7. What kind of fruit are these brands?

a) Zespri
b) Pink Lady
c) Jazz
d) Envy
e) CityFresh
f) Dole
g) Driscoll's
h) Sunkist
i) Avanza

8. How do you know these brands? (Question for each brand that respondents have seen)

a) Point of sales
b) Advertisement
c) Recommended by others
d) Received from others

9. Where did you see the advertisement? (Question for respondents who have seen an advertisement)

- Point of sales
- TV
- Radio

- Facebook
- Instagram
- Magazine
- Website
- Workplace
- Steet Billboard
- BTS or MRT Billboard

10. Have you ever consumed it? (Question for each brand that respondents have seen)

a) Yes

b) No

11. To what extent you think this brand is..

	Strongly disagree	Disagree	Agree	Strongly agree
X Brands is fresh				
X Brand is nutritious				
X Brand is good-looking				
X Brand is safe				
X Brand is delicious				

12. What is your hobby (Can answer more than one)

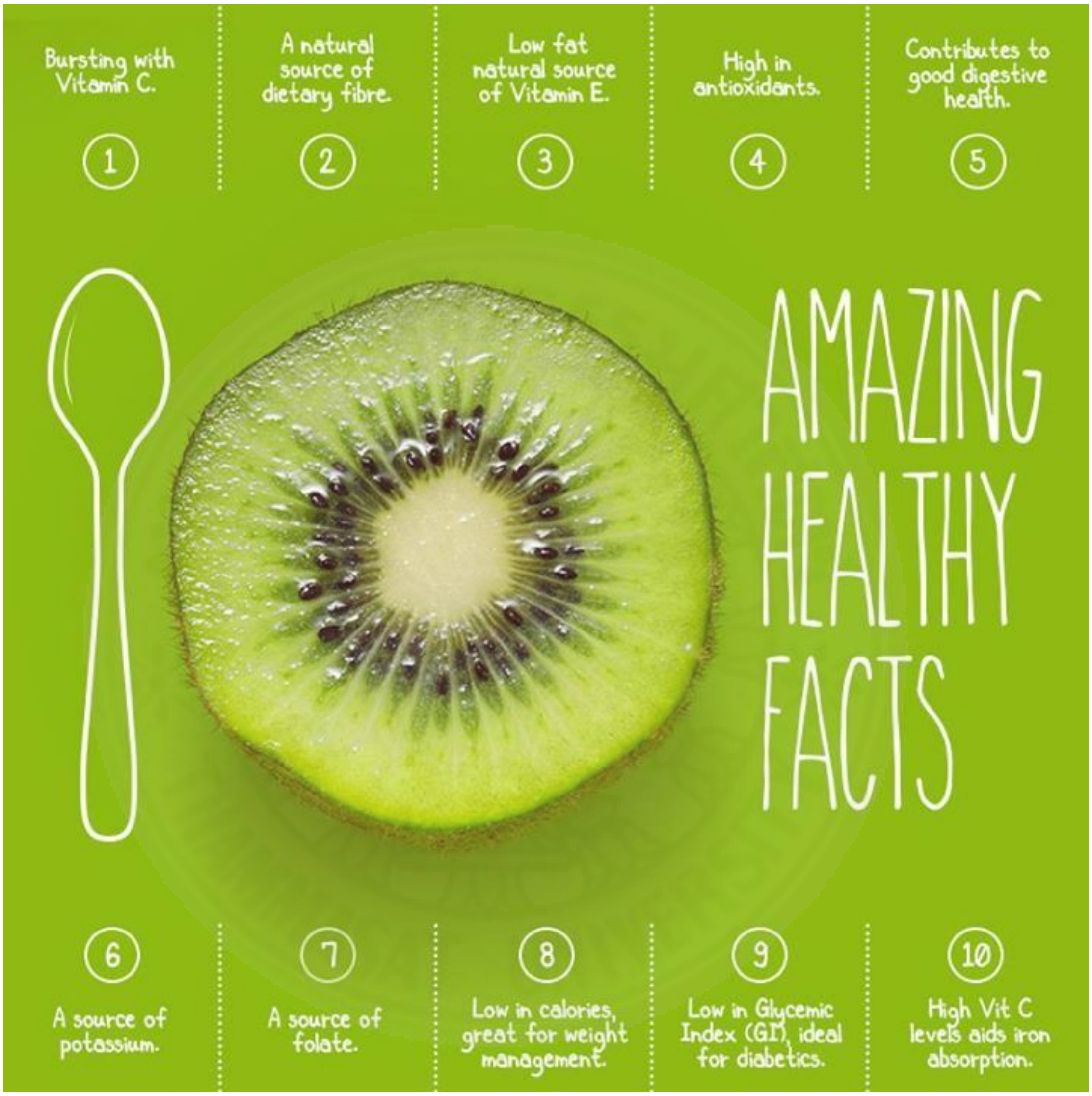
- Cooking
- Reading books
- Watching TV
- Browsing Internet
- Shopping
- Exercise
- Cafe hopping
- Others (Please specify)......

APPENDIX D

Example of Appearance-focused advertisement

APPENDIX E

Example of Nutritional value-focused advertisement



BIOGRAPHY

Name	Mr. Wongsakorn Chatamornwong
Date of Birth	Febraury17, 1989
Educational Attainment	Academic Year: 2018
Work Position	Executive Director - Operation Cititex Group
Scholarship	Year 2011: Bachelor of Business Administration, International Business Management, Mahidol University International College