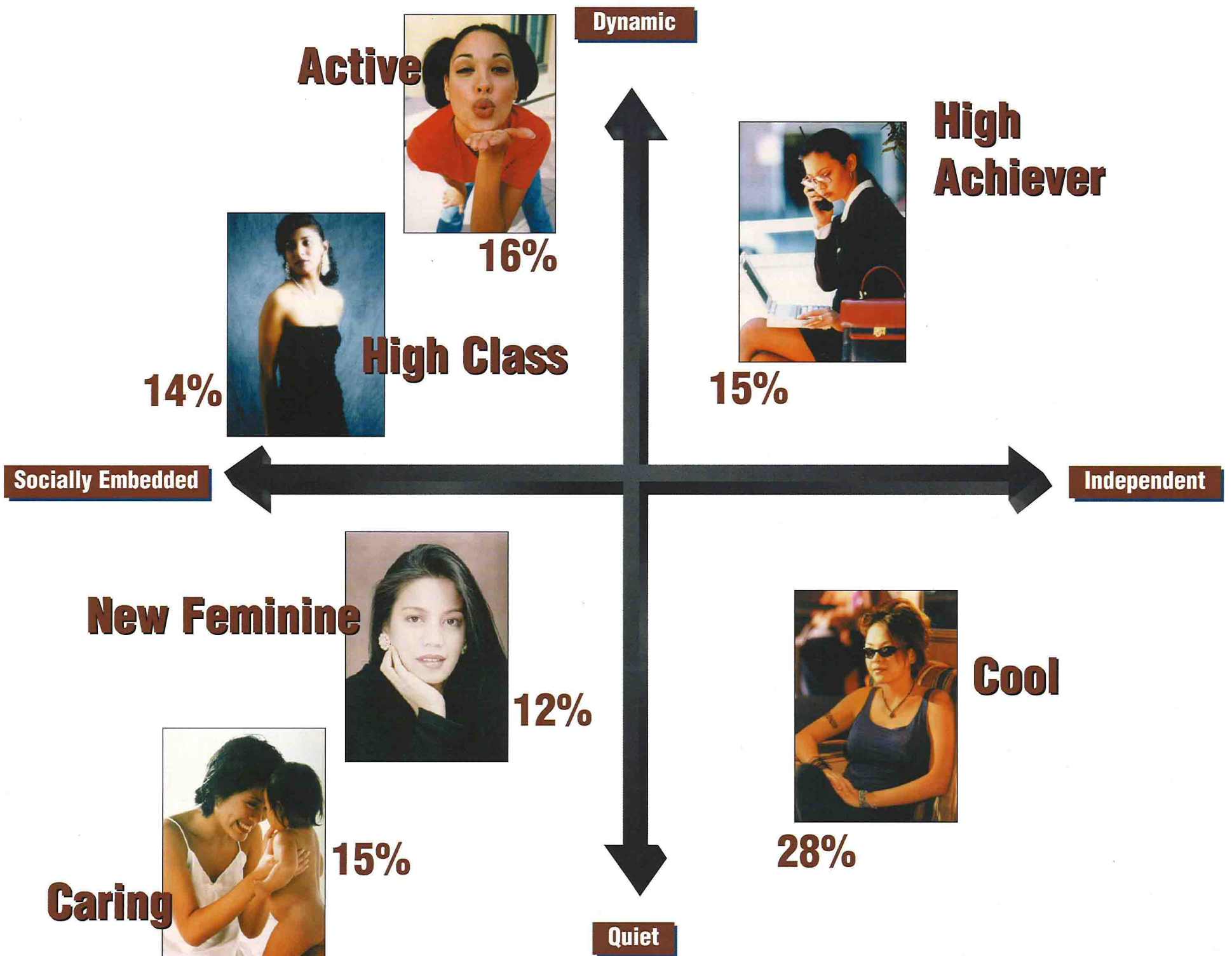


**To Hakuhodo,
the target is
an individual,
not just a consumer.**

Looking Beyond What Asian Women Are Today



The task of marketing is to look beyond consumers' needs today and to anticipate tomorrow's trends. Understanding consumers' current lifestyles is only the first step. The second is looking ahead to trends that create new opportunities.

In Japan, HakuHodo has addressed this task with research driven by the *Sei-Katsu-Sha* concept. The *Sei-Katsu-Sha* is more than a consumer, a person with a life that encompasses far more than shopping and consumption alone. But even current lifestyles are only a beginning. To understand the *Sei-Katsu-Sha* and the market opportunities they offer, you need to know their dreams and where those dreams are likely to take them.

Now HakuHodo is bringing *Sei-Katsu-Sha* research to Asia. Round 1 focused on the common features of business people across Asia. It explored their reactions to the recent financial crisis and their hopes for the future.

In Round 2 the focus is on Asian women, to whom the continued growth of Asian economies offers new opportunities, as members of the workforce as well as consumers. What kinds of women do they want to be? Tracking and responding to their aspirations will be a critical challenge for brand managers and marketers across the region.

To help them translate Asian women's aspirations into effective strategies, HakuHodo has developed new tools—Bonding and Voice Scales—that will help them to improve their targeting and to strengthen their message as well.

RESEARCH DESIGN

1. Focus Group Interviews

Target

Four groups in five cities; 20 groups in all cities.

Groups composed of high school and college students, working women aged 18 - 39.

Locations

Hong Kong, Shanghai, Bangkok, Kuala Lumpur, Manila

2. Sample Survey

Target

Women aged 15-39

Locations

Beijing, Shanghai, Guangzhou, Hong Kong, Taipei, Bangkok, Singapore, Kuala Lumpur, Manila, Jakarta, Ho Chi Minh

Sample Size

N = 3,156

Research Partner:

Asia Market Intelligence Ltd.

The Women That Asian Women Most Want to Become

Caring

She is the ideal traditional wife and mother. Her happiness is linked to her family. She enjoys every day life.

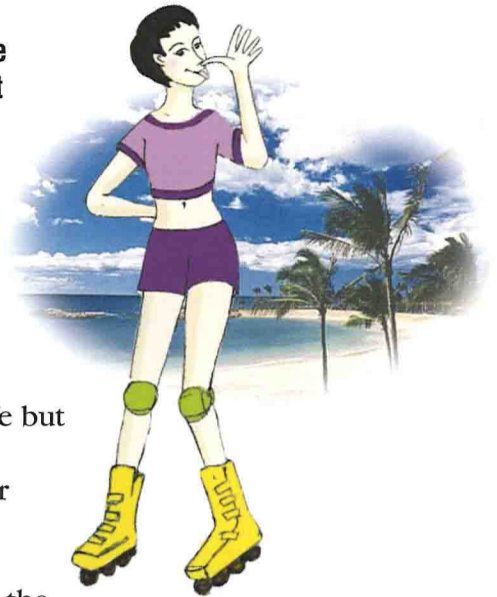
- Her family is the most important element in her life.
- Her highest priority, more than herself, is to fulfil the wishes of those around her.
- She has a strong sense of social responsibility.
- She likes doing things for her family and others.
- She finds her pleasures and happiness in her daily life.
- She is cute, caring, practical, unaffected, and optimistic.



Active

She wants to be young and active forever. She doesn't worry about tomorrow. She is a leader in sports and other group activities and she is sociable.

- Being full of energy is the key.
- She has her own sense of style.
- She lives a full and active life but she doesn't plan ahead.
- She likes sports and outdoor activities.
- She prefers casual fashion.
- She has many friends and is the leader of the group.
- She likes to try all sorts of things.
- She has her own clear opinions.



New Feminine

Striking a balance between work and home, she is cautious in maintaining a soft and feminine image. She is polite and refined, and remains a down to earth character. Everybody likes her.



- She is active both at family and work.
- She is the type of woman everyone likes.
- She wants to be highly regarded by others.
- Having a harmonious relationship with family and friends is very important to her.
- She cultivates an air of refinement.
- Her clothes and accessories are elegant but subdued.
- She is gentle, polite, youthful, caring, more traditional than modern, down to earth, generous and content.

High Achiever

She is highly independent, articulate, and determined to achieve her career objectives. She has a career in which her goal is to be successful. Her career is not just a job.

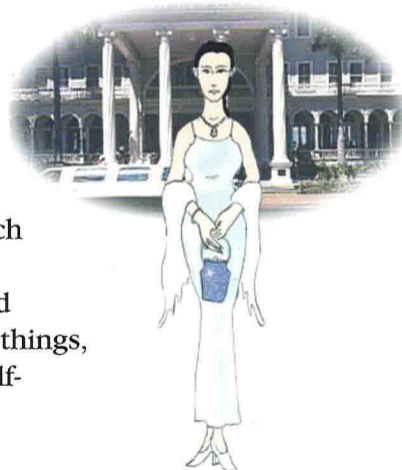
- Her job gives her authority with responsibility.
- Success is her number one goal.
- She fills her days with work.
- She is highly energetic, self-confident and generous.



High Class

She is elegant and highly educated, a mature adult with a wealth of spiritual and material assets.

- She lives in high society, has a rich and full life.
- She is a mature adult, relaxed and generous, not bothered by small things, well-bred, cultured, polite and self-confident.
- She has good fashion sense.



Cool

She hates conventional thinking and values and is always trying to express her uniqueness.

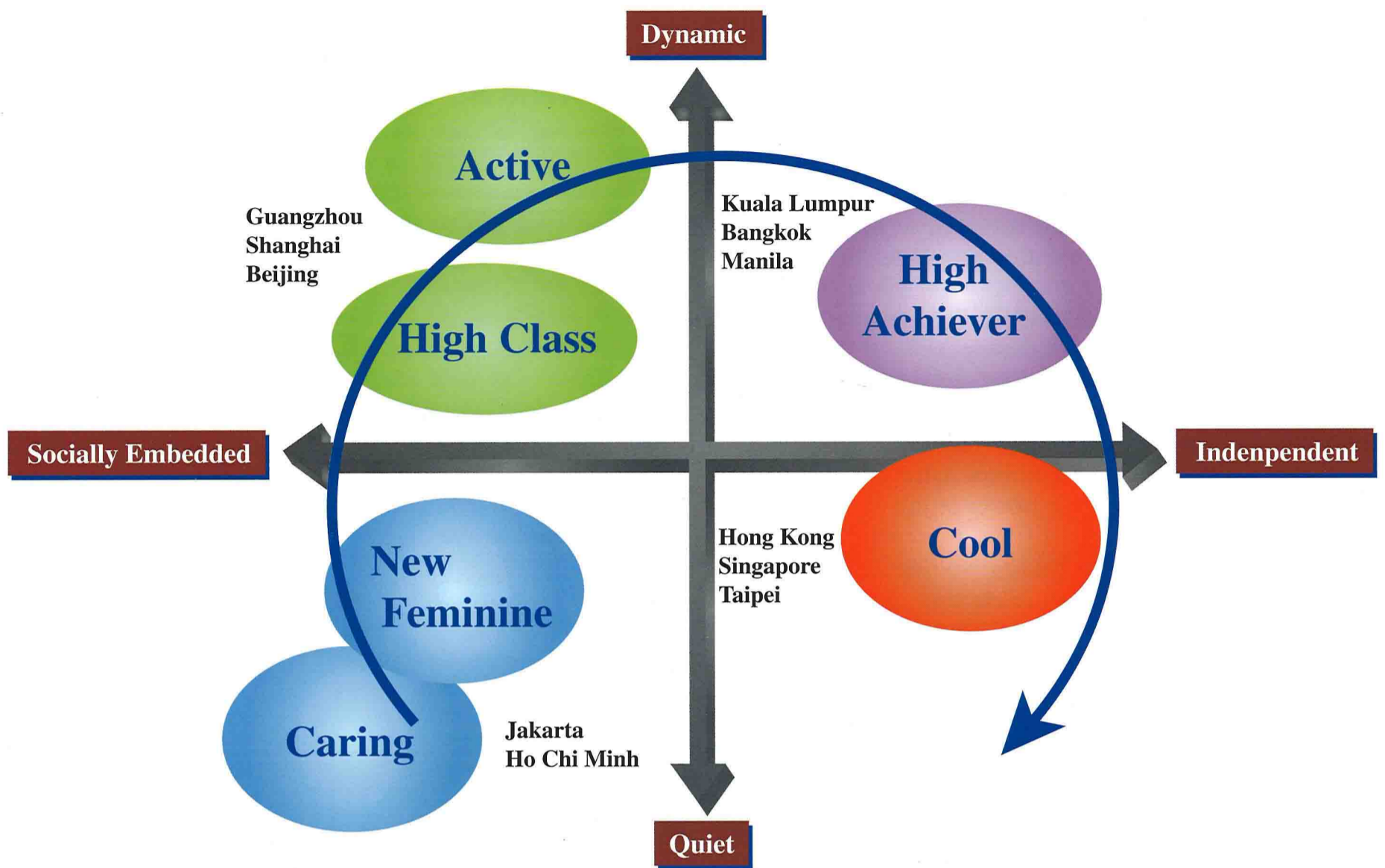


- She wants to be different.
- She sees the world from a cool, disillusioned perspective.
- She always prefers new ways to old ways.
- She has her own sense of beauty and style.
- She prefers avant-garde fashion.
- She doesn't want responsibility.
- She has no interest in success.
- She is not influenced by those around her.
- Self-expression is vital to her.
- She is decisive, funky and wild.

HOW THE RESEARCH WAS CONDUCTED

What do Asian women aspire to become? Who are the ideal women that they would like to be? Prior to the mass sample survey, a list of statements describing ideal images of women was developed from the analysis of the focus group interviews. Mass survey respondents were asked to rate their desire to be like the women these statements described. They were also asked to circle a list of desirable characteristics. Cluster analysis of their answers revealed the six types described here.

Time's Arrow, Tomorrow's Needs



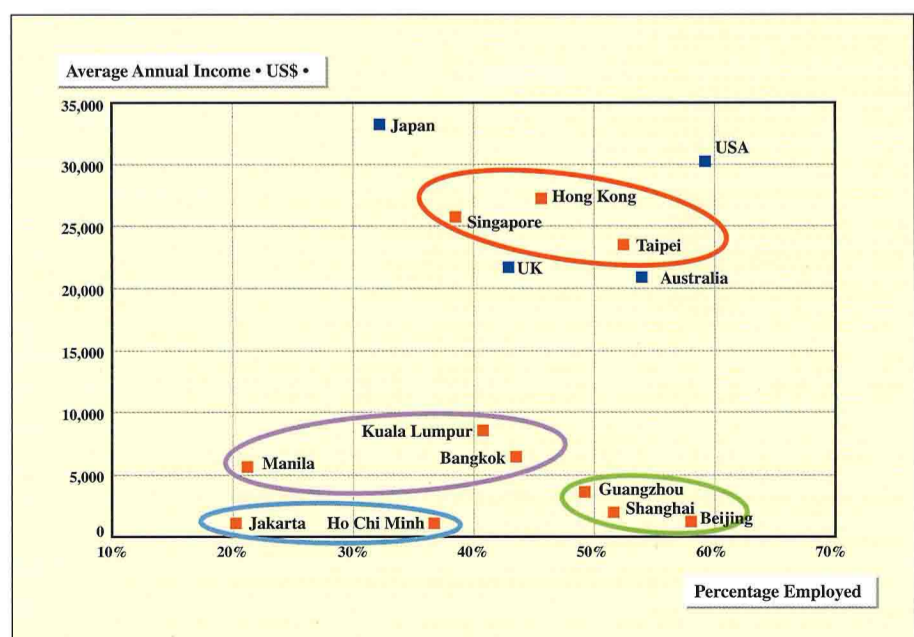
As incomes rise, the number of Asian women who aspire to become traditional Caring-type women declines. While incomes are low and the percentage of women in the work force is still relatively small, their aspirations shift to the New Feminine type, who balances home and work.

With incomes still low but more women in the work force, younger women aspire to be the Active type. Older women desire to become High Class, insulated by culture, refinement and wealth from the daily worries of less affluent women.

As incomes improve, the High Achiever becomes the ideal for a growing number of women. But where incomes are high, her lustre dims. The new favourite is the Cool type, whose lifestyle involves neither marriage nor major responsibilities.

Where Do We Find Them

The Caring and New Feminine types are ideal for women throughout the region. The High Class and Active types scored highest in China, which has the next-to-lowest average income level. The High Achiever was strongest in Southeast Asia where average incomes are a little bit higher. The Cool Type was strongest in places such as Singapore, Hong Kong and Taipei, where income levels are high.



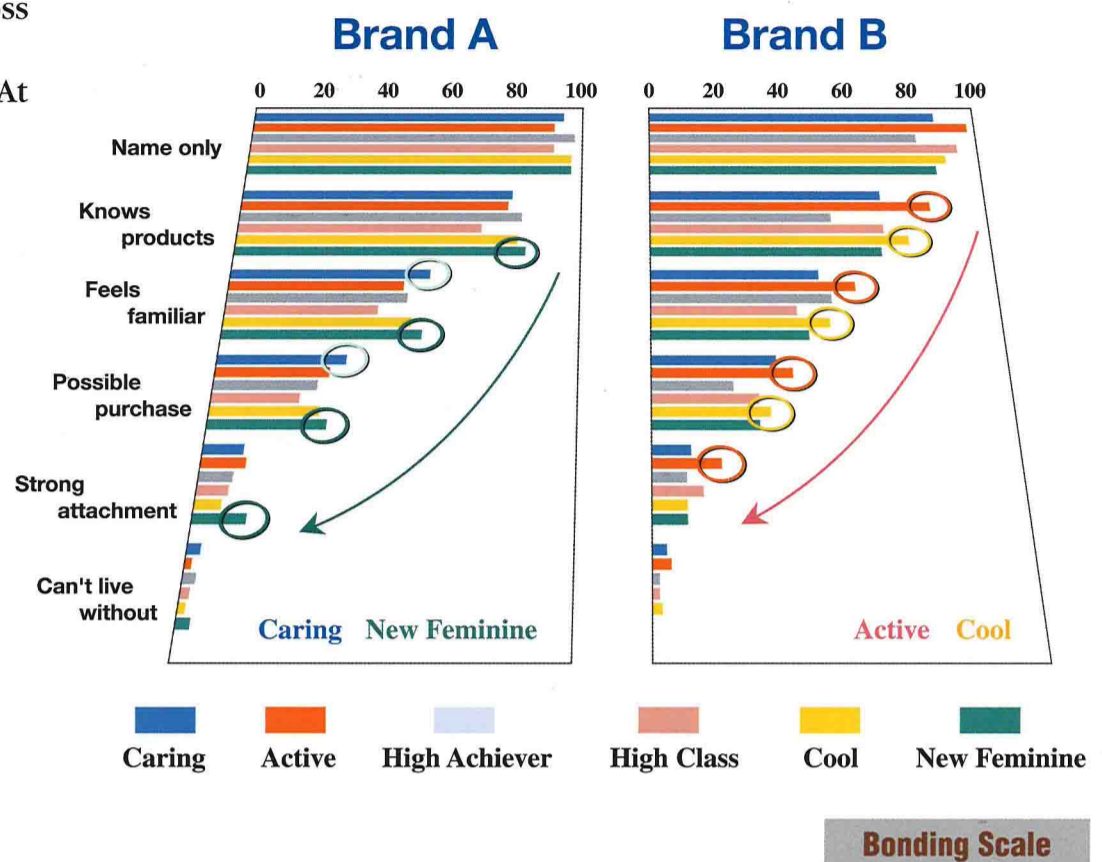
Bonding: The Key to Effective Targeting

How strongly do Asian women identify with brands?

The strength of consumer bonds with brands is a crucial marketing index for marketers across Asia. Many consumers may know a brand name, but lack strong attachments to the brand. At the other extreme, loyal consumers may develop such a strong attachment that they can't live without it. Whether the bond is strong or weak has a big impact on the consumers' purchase intentions.

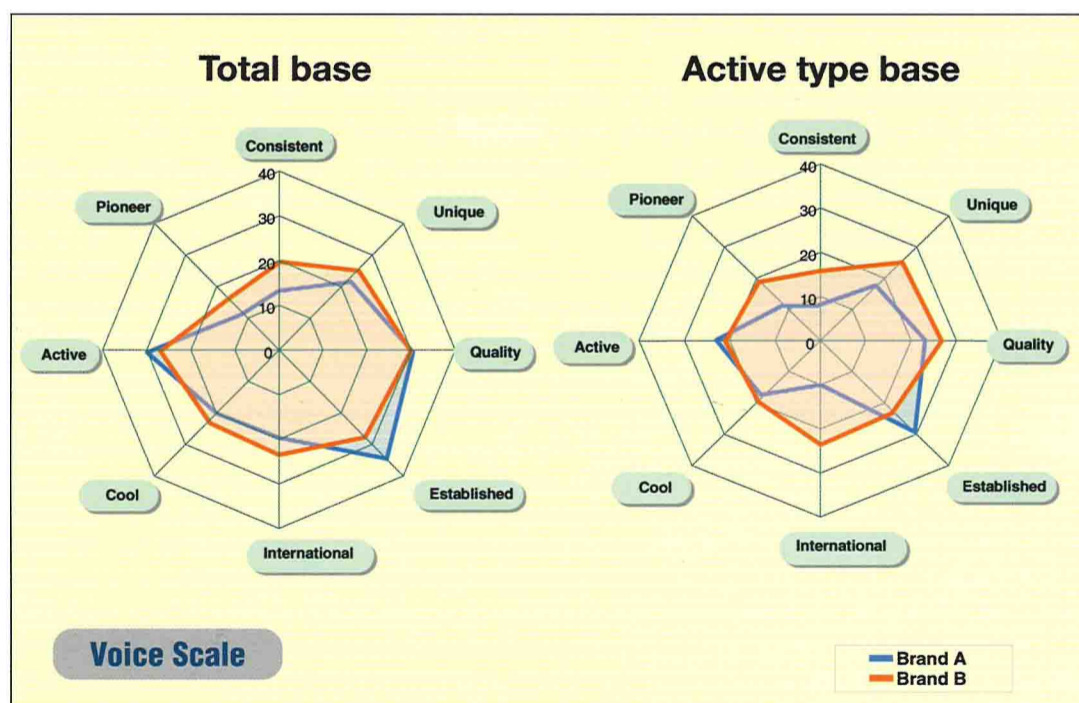
Comparing a brand with its leading competitors and looking more closely at bonding scores broken down by the six ideal types of Asian women's aspirations can reveal important differences. Two leading shampoo brands are used here to illustrate how Asian women's aspirations affect the power of the brands in question.

Brand A is strongly supported by women who find the more traditional Caring and New Feminine lifestyles attractive. Brand B is supported more strongly by women who aspire to be Active and Cool.



Voice: The Key to Refining Your Message

Consider, for example, two market leaders



How to use these results

The Bonding scale is used to focus targeting strategies, to build on existing strengths or, alternatively, to address gaps in consumer support. The voice scale is used in brand positioning and developing a more persuasive message. The basic principle is the same, to build or focus on strengths or to address perceived weaknesses. Once these key strategic decisions are made, the creatives can be briefed and set to work to produce more effective and efficient campaigns.

While the bonding scale measures the strength of consumers' attachment to a brand, the voice scale answers other questions: How is a brand perceived? Is it seen as having unique image and a strong and consistent brand message? Is it perceived as a symbol of quality, cool or a pioneer? Is it popular, growing or active? Is it accepted by people around the world?

Overall, brand A surpasses brand B on the active and established dimensions. Brand B is seen, however, as having a clearer, more definite message and as a cool, more unique and more international brand.

Brand A and B were equally rated in terms of functional quality: neither scored higher as a pioneer.

Suppose, however, that we look lonely at women who aspire to be the Active type. Now the differences are striking. While one brand retains its edge on the active and well-established dimensions, it is now substantially weaker on both the international and the clear-and-consistent-message dimensions. It is also weaker in terms of perceived functional quality.

Brand building in Asia

Increasingly Asian women participate in a global economy. However, the purchasing decisions they make continue to be shaped by both by local traditions and, increasingly, by the messages transmitted by regional media. Here we find advertising that transforms and presents global marketing messages by translating them into regional languages and campaigns that speak to regional, instead of to purely local, audiences. Here is where brand managers may face their greatest challenge. While, on the one hand, the global message may fail to cross linguistic and cultural barriers, on the other "in-country" expertise that is limited to particular national markets may prove a poor guide for campaigns that must cross national boundaries. What is needed is the kind of research reported here, *Sei-Katsu-Sha* research that captures what is going on in that vital middle ground we call the regional market.

ASIAN WOMEN TODAY

Our survey also explored current lifestyles. The research technique was the same, asking respondents to rate their degree of agreement with statements describing their lives today. Here again cluster analysis produced another six-types that you may find useful in assessing the gaps between where Asian women see their lives today and where they would like to be in the future.

New-is-Better

Loves trying new things and would like to travel overseas. Caught up in the present. Not worried about the future.

Wants-It-All

Has too many choices. She wants it all, but desire does not necessarily lead to action.

Ms. Positive

Cheerful, forward-looking and willing to make an effort. She brings a positive attitude to everything she does.

The Traditionalist

Enjoys her everyday life, but her primary focus is the family. She prefers an ordinary lifestyle.

The Anxious

She is not unhappy with her current life, but she worries about the future. She fears risk but can be persuaded to make small changes.

The Contented Homebody

Relatively content with her current lifestyle, she is inward-looking and conservative, cherishing her family and herself.



“SEI-KATSU-SHA”

To any other advertising agency, he may be just a consumer. To us, he's an “individual.”

Our ads don't target abstract “consumers.” They talk to sei-katsu-sha — individuals who dream private dreams, live meaningful lives, and cherish particular values. To create advertising that moves the hearts and minds of these real people, we need to understand them, in depth.

The more realistic the mental image we have, the more convincing our message can become.

The same holds true for developing a brand strategy that will nurture customer-product empathy.

Our pioneering multinational studies — focusing on Asian women, Asian businessmen and others —

reveal many things about these sei-katsu-sha. Armed with this knowledge, our team of advertising professionals — from strategic planners to creative staff — collaborate to deliver effective, relevant solutions.

They're supported by our own Asian network, to assure the highest quality when and where you need it throughout Asia. Communicate your marketing message to your Asian sei-katsu-sha.

With Hakuhodo. Your Asian Market-Design Partner.

ASIAN MARKET-DESIGN PARTNER

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