

Press Information

Global Survey Studies 16,000 Consumers in 21 Cities Asian Consumers Overcoming Economic Crisis

Tokyo January 17, 2003 The last three years have seen dramatic growth in Information Technology usage. In Asia, where that growth continues, HakuHodo's Global HABIT* survey 2002 data reveal that PC and mobile phone ownership rates in Hong Kong and Seoul have surpassed those in Japan.

In Korea and Thailand, which have overcome economic crisis, and mainland China, which is now experiencing unprecedented growth, consumers are full of energy and report that during the last year their lifestyles have improved. They expect to see further improvements during 2003.

Energetic, forward-looking consumers in these Asian markets give products made in Japan high marks for quality and style, but also give high marks for stimulating market activity to Korean products, whose growing market presence is striking. Both Japan and Korea are seeing growing influence on youth culture throughout the region.

Global HABIT survey is designed to bring a truly global perspective to marketing communication strategy. Global HABIT 2002 is the third in a series of surveys that began in 2000. The survey is administered to 16,000 consumers, aged 15-54, in major 21 cities around the world.

*HABIT is an acronym for HakuHodo Audience & Brand-Users Index for Targeting

<Survey Overview>

Cities :

China(Shanghai, Beijing, Guangzhou), Hong Kong, Taiwan(Taipei),
Thailand(Bangkok), Malaysia(Kuala Lumpur), Singapore, South Korea(Seoul),
Philippines(Manila), Indonesia(Jakarta), Vietnam(Ho Chi Minh), India(Delhi,
Mumbai), USA(New York, Los Angeles), Italy(Milan), Spain(Madrid),
Australia(Sydney), Japan(Tokyo, Osaka)

Sample:

Male/female individuals

Aged 15-54

Approx. 500-800 / city (In Japan, 5,000)

21 cities

Total n=16,000

Approach:

Door-to-Door Interview (Asia), Door-to-door Interview and Drop and Pickup
method (Europe), Mail survey (USA), Door-to-Door Interview and Mail survey
(Japan)

For further information, please contact:

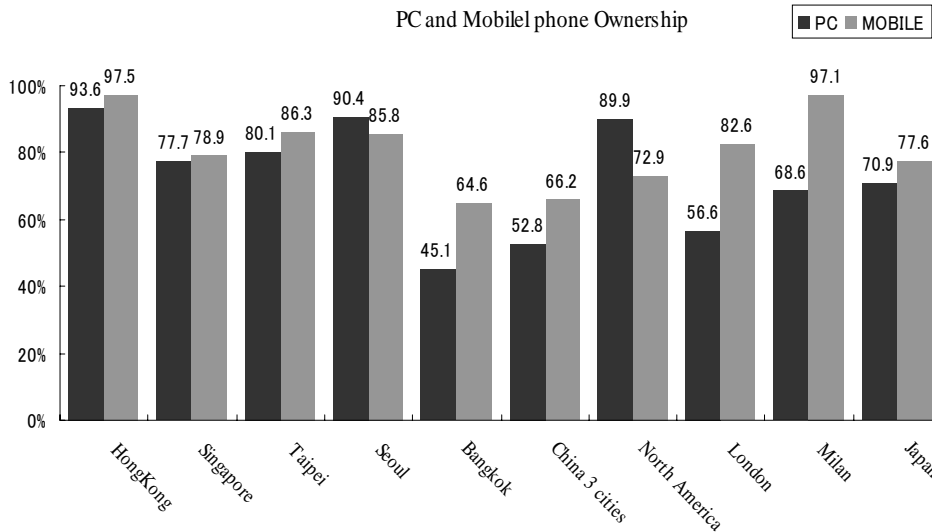
J. Terajima / U. Hirasawa Tel : +81-(0)3-5446-6161
Corporate Public Relations Division Fax:
+81-(0)3-5446-6166

S.Murokawa / K.Ohashi Tel : +81-(0)3-5446-6153
R&D Division Fax:
+81-(0)3-5446-6190

Reference

Globally speaking, IT is most advanced in Asia

- In Hong Kong, Taipei, Singapore, and Seoul, both rates of PC and mobile phone ownership are extremely high, and IT literacy is higher than in Japan, North America, and Europe.
- In three major Chinese cities and in Bangkok, even though the diffusion rates are low, mobile phone ownership growth has been spectacular and is rapidly close to North America. (Bangkok : 2000/26.4% →2002/64.6%, China 3 cities: 2000/33.8%→2002/66.2%)



Mobile phone e-mail has become a global trend. Japan is by far and away the leader in mobile phone access to the Internet. The majority of American mobile phone users use phones neither for e-mail nor for Internet.

- Mobile-phone e-mail usage(including SMS) has already become a global trend. Except North America, Taipei and Bangkok, 60% of mobile phone users use it for e-mail.
- The rate of mobile phone usage for Internet access in Japan is overwhelmingly higher than that of other cities.
- The majority of American cell phone users use it neither for e-mail nor for Internet.

< Precise use of mobile phones for e-mail and Internet access>

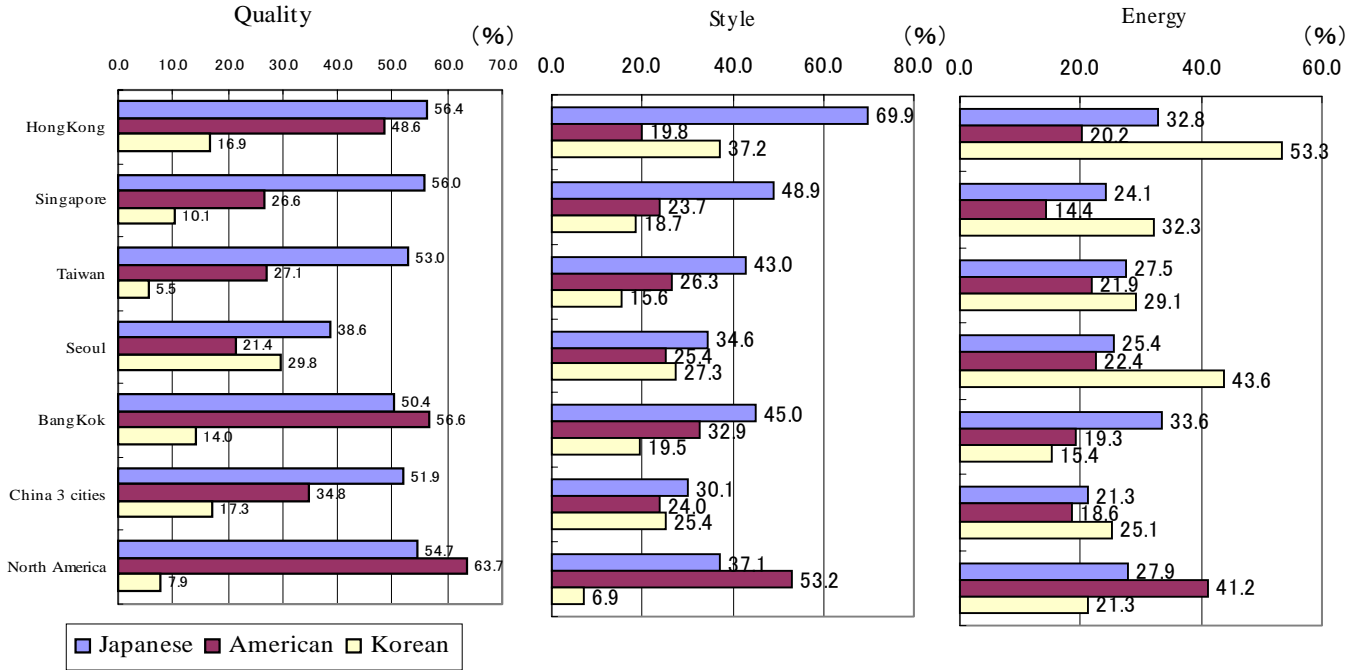
=Score Over 50%

	e-mail	Internet/Web	Only phone usage	(%)
HongKong	61.8	6.7	37.7	
Singapore	79.3	1.5	20.5	
Taipei	42.5	3.5	57.1	
Seoul	67.5	16.2	31.3	
Bangkok	46.8	3.1	52.4	
China 3 cities	71.4	4.1	28.1	
North America	32.4	5.8	65.0	
London	65.1	7.0	32.7	
Milan	73.0	3.2	26.6	
Japan	75.3	71.2	21.3	

Product Image by Country of Origin

- Japan scores high for “Quality” and “Style”, Korea for “Market Energy”

- Japan scores far higher than North America or Korea in its reputation for “Quality” and “Style”, everywhere except Bangkok and North America. Korean products still receive low scores on “Quality” dimension but are exceeding Japanese and American products in the “Market Energy” dimension and running close behind Japanese products for “Style” in China .



Entertainment Preferences of Young Consumers in Asia

Hong Kong and Taiwan pop culture a powerful force; Japanese and Korean pop culture also having an impact.

- In Hong Kong, Taipei, mainland China, and Singapore, wherever Chinese are the majority population, Chinese-language contents produced in Hong Kong and Taiwan are overwhelming favorites.
- Japanese music and TV dramas have also become widespread in Asia, followed by Korean contents.
- Hollywood, however, continues to dominate the movies.

< Pop-culture Preference of Young Consumers (Male/Female 15-24)

 =Score Over 50%

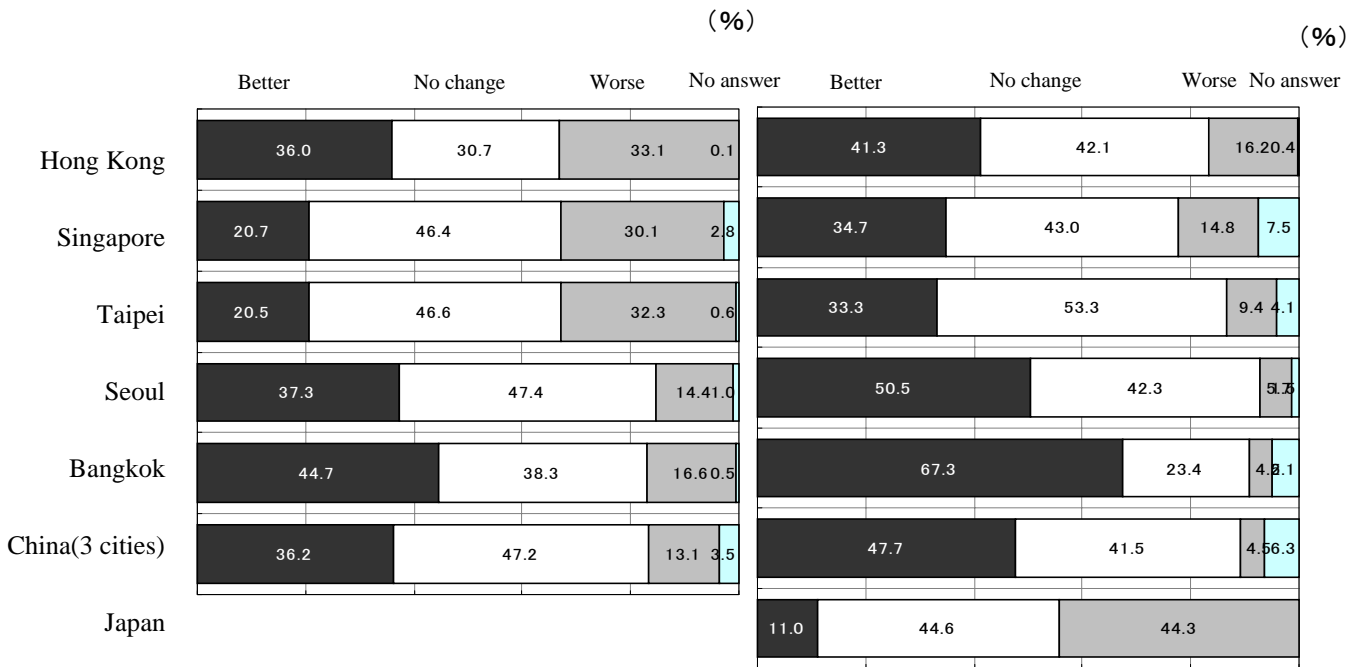
	Frequently viewed TV dramas				Preferred music/pops				Frequently viewed movies			
	HKG · Taiwan	Japan	Korea	EU/USA	HKG · Taiwan	Japan	Korea	EU/USA	HKG · Taiwan	Japan	Korea	EU/USA
HongKong	64.5	22.5	7.5	7.5	93.5	45.5	17.5	40.5	19.5	3.5	1.5	16.5
Singapore	41.7	17.3	12.6	11.0	25.2	11.0	2.4	48.0	27.6	8.7	3.1	48.8
Taipei	38.9	18.2	23.2	3.5	83.3	28.3	6.6	30.8	24.7	6.6	2.5	46.5
Seoul	1.0	1.0	68.3	0.5	0.5	4.0	28.6	24.5	8.5	2.0	76.9	30.0
Bangkok	5.0	10.5	2.5	10.5	0.0	7.0	1.0	25.0	5.0	5.5	1.0	31.5
China (3 cities)	66.6	15.2	13.3	10.3	76.9	23.7	17.7	17.5	46.2	10.6	9.3	21.1

Life in Asia, Last Year and This year

- In Seoul, Bangkok and three cities in China, where economic growth was solid, the % rating their lives last year as “Better” was high. In Singapore and Taipei, where economies were in decline, scores for “Worse” exceeded those for “Better.”
- Expectations for a better life this year were extremely high in Seoul, Bangkok and three cities in China. Expectations that life will be “Better” were higher than expectations that life will be “Worse” in Singapore and Taipei as well. The highest degree of pessimism is found in Japan, where expectations where “Worse” scores four times higher than “Better.”

Evaluation of Life Last Year

Expectation of Life Next Year



We also have other results of following researches.

○ Weight Given to Lifestyle Values by Market

~”Health”, ”Family” and ”Stability” are universal values all around the world.

○ Hobbies and Special Interests

~Is Shopping Asia’s major interest? In Europe and America eating out scores higher.

...etc.