

## Latest report from Hakuhodo Global HABIT

### Hakuhodo's survey of 16,000 consumers in 25 cities around the world

#### Global 7 Lifestyles

##### Consumer perceptions in 25 cities worldwide can be classified into 7 behavioral patterns

- ◆ Hong Kong a microcosm of the world
- ◆ Mainland Chinese people want stability
- ◆ Japanese people value harmony and avoid friction
- ◆ Americans and Europeans dislike being isolated

Tokyo June 13, 2003 Hakuhodo has announced results of analysis of its Global HABIT database of 16,000 people in 25 cities around the world. Analysis of results shows that *sei-katsu-sha*, or ordinary consumers around the world can be divided into seven lifestyle groups. The Global 7 (G7) groups are present to varying degrees in all countries and cities, and can be used to define like target groups in a global marketplace. This makes tailoring of local marketing and branding activities through knowledge of the distribution of the groups in each region or country a possibility.

The seven groups identified are the *Go-Getters* and *Pleasure Seekers*, who are early adopters and highly IT and computer-literate; the *Self-Adjusters*, *Leisurely Pacers* and *Tireless Workers*, which form the key groups for market expansion; and the *Slow Starters* and *Passives*, who enter markets slowly.

Our analysis shows that *in Hong Kong, these seven groups exist in proportions roughly the same as the global average*. Hong Kong thus presents as a microcosm of the world. In the Chinese cities of Beijing and Guangzhou, there are high proportions of Slow Starters, who seek a carefree life (35.4% and 35.2%, respectively), and Passives, who have low interest in lifestyle changes and new products (31.6%, 33.0%).

In the Japanese cities of Tokyo and Osaka, the stand outs are Leisurely Pacers, who value harmony in and outside the family (27.3%, 25.6%), and Slow Starters, who just

want to live a stable, healthy life (27.6%, 27.7%). These cities also have more Pleasure Seekers who want to live for the moment (14.7%, 14.7%) than others in Asia.

Compared with their Asian counterparts, there are proportionately more Pleasure Seekers among *sei-katsu-sha* in the US cities New York, Los Angeles and Chicago (12.3%, 9.3%, and 13.8%), and the European cities London, Paris and Berlin (13.8%, 15.6%, and 21.6%). Likewise, Self-Adjusters, who value relationships with others and dislike being isolated, make up a noticeably greater proportion of people in the same US cities (38.8%, 32.9%, and 42.4%) and European cities (27.0%, 14.7%, and 27.5%).

♦ The Global 7 lifestyles – Overall average distribution in 25 cities worldwide (%)

**G1: The Go-Getters (11.9%)**

With a wide variety of interests, Go-Getters are proactive in all their activities. They go their own way rather than follow others, and have a strong tendency to lead those around them. (Present in numbers in Mumbai, Seoul and Kuala Lumpur)

**G2: The Pleasure Seekers (8.8%)**

Trend followers, Pleasure Seekers just want to have a good time. They live in the here and now and leave tomorrow until tomorrow. Always on the lookout for stimulation, they are impulsive buyers of new products. (Present in numbers in Berlin, Paris, Tokyo and Osaka)

**G3: The Self-Adjusters (13.2%)**

Self-Adjusters do not like to be on their own, and seek to build friendly interpersonal relationships. While not exactly extroverted, they do have self-confidence and want their relationships with others to be equality-based. (Present in numbers in Chicago, Madrid and New York)

**G4: The Leisurely Pacers (14.0%)**

Leisurely Pacers desire a peaceful life of abundance, with harmonious relationships within and outside the family. Generally satisfied with their lot, they seek comfort. They tend not to be optimistic overachievers, and endeavor to avoid frictions and keep the peace. (Present in numbers in Tokyo, Osaka and Delhi)

**G5: The Tireless Workers (10.8%)**

Earnest and conscientious, Tireless Workers are diligent and hard working. They do not mind sacrificing themselves for others, and are hard on themselves, stoic and value traditions. They have little sense of fun and are constantly driven by their sense of duty. (Present in numbers in Manila, Delhi and Bangkok)

**G6: The Slow Starters (20.5%)**

Happy if they can live a healthy and stable life, Slow Starters have low desire for advancement and material things. Rather than making their own efforts, they tend to rely on others. Not overly

interested in trends, they are happy just to cruise through life. (Present in numbers in Beijing, Guangzhou, Taipei, Tokyo and Osaka)

**G7: Passives (20.8%)**

With particularly low interest in self-actualization, Passives also have little interest in changing their lives and in new things. They do not pay much heed to interpersonal relationships and what people think of them. Slightly reclusive, this group is passive by nature. (Present in numbers in Milan, Seoul and Jakarta)

Hakuhodo conducts its Global HABIT survey of consumers each year to build a database of information useful in designing marketing and communication strategies. The comprehensive 2002 Global HABIT survey polled 11,000 people aged 15-54 in 25 cities worldwide, as well as 5,000 people in Tokyo and the Kansai region of Japan about their lifestyle preferences, brand selection and use of products.

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**Outline of Hakuhodo's Global HABIT survey**

- Cities surveyed: Shanghai, Beijing, Guangzhou (China); Hong Kong; Taipei (Taiwan); Bangkok (Thailand); Kuala Lumpur (Malaysia); Singapore; Seoul (Korea); Manila (Philippines); Jakarta (Indonesia); Ho Chi Minh City (Vietnam); Delhi, Mumbai (India); New York, Los Angeles, Chicago (USA); London (UK); Paris (France); Berlin (Germany); Milan (Italy); Madrid (Spain); Sydney (Australia); Tokyo, Osaka (Japan)
- Respondents: 500-800 males and females aged 15-54 in non-Japan cities, and 5,000 males and females total in Tokyo and Kansai, Japan
- Method: In-home interview survey (Asia); in-home interview survey/self administered questionnaire (Europe); postal survey (USA); in-home interview survey/postal survey (Japan)
- Content: Brand evaluation, product use, lifestyle perceptions, consumption perceptions, media behavior
- Survey period: International: annual (May-June); Japan: several times a year

Please see below for more analysis highlights.

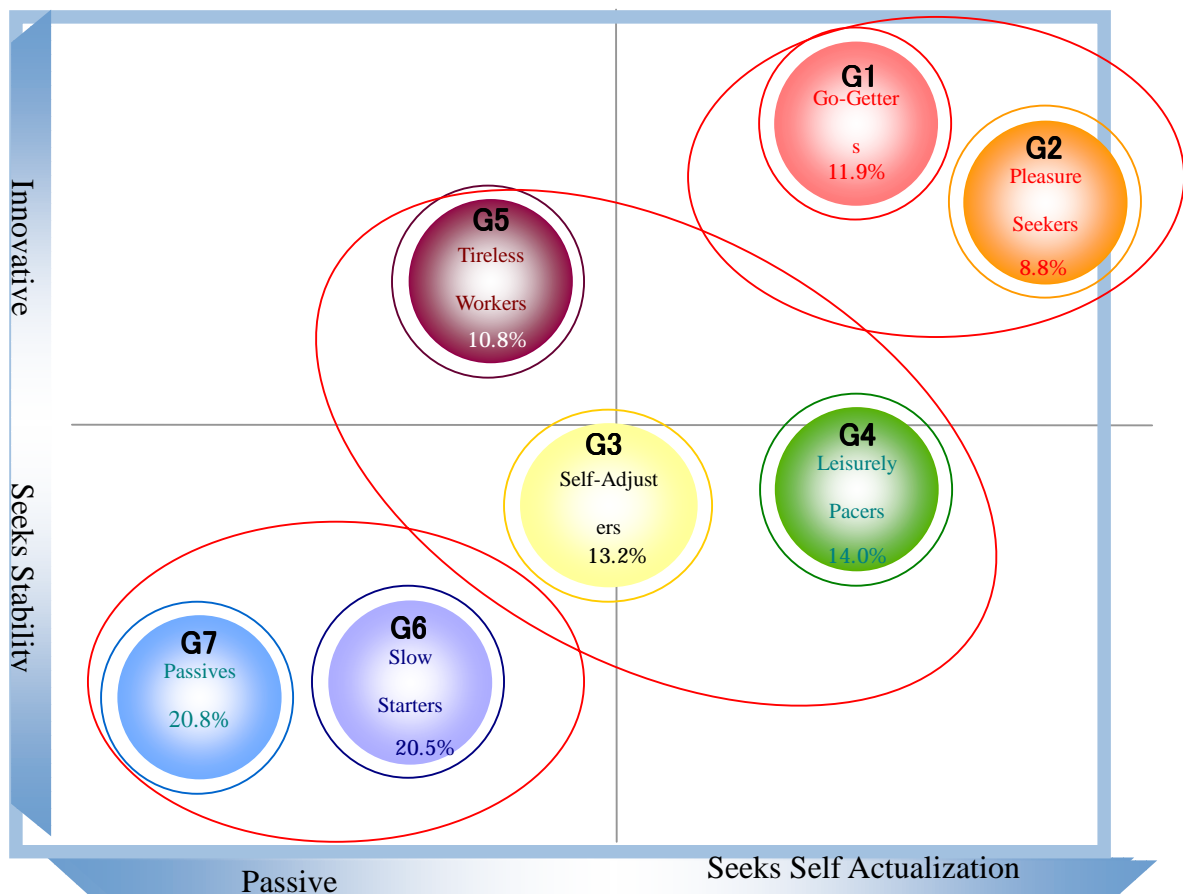
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## Reference

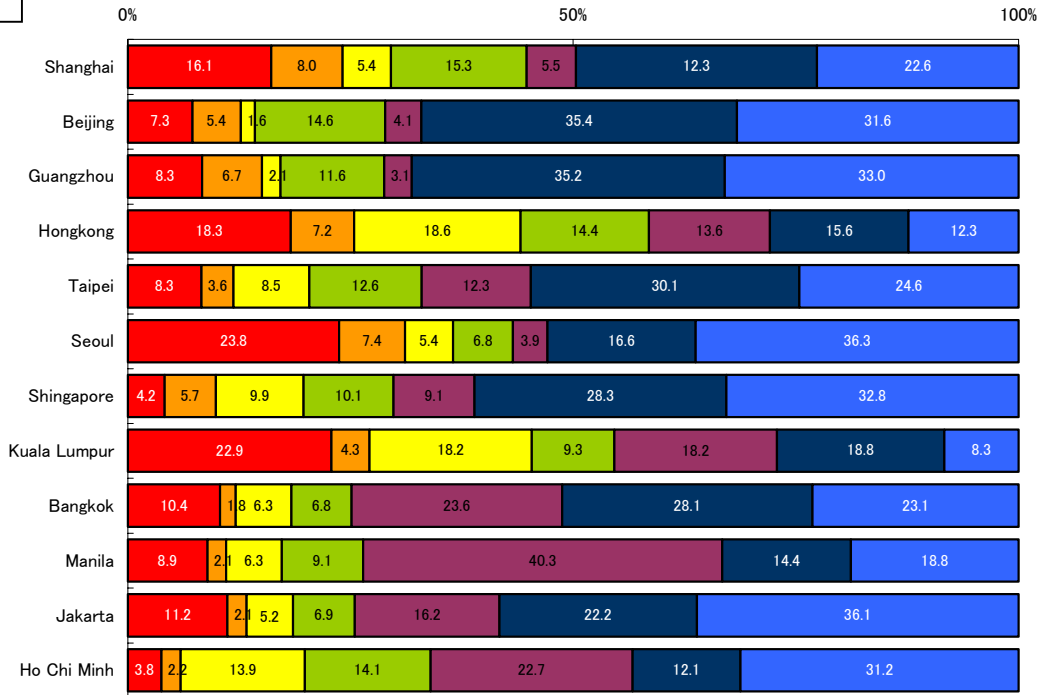
- We mapped the Global 7 (G7) common lifestyles. The vertical axis represents the innovation/stability continuum. The further up this axis, the greater the interest in an enjoyable life and new products, the lower down the axis, the stronger the desire for a stable and quiet life. The horizontal axis represents proactive self-actualization versus passivity. The further right, the stronger the enterprising spirit and desire for self-actualization. The further left, the stronger the tendency to deny one's feelings and remain passive.

### Global 7 (G7): The Seven Common Global Lifestyles

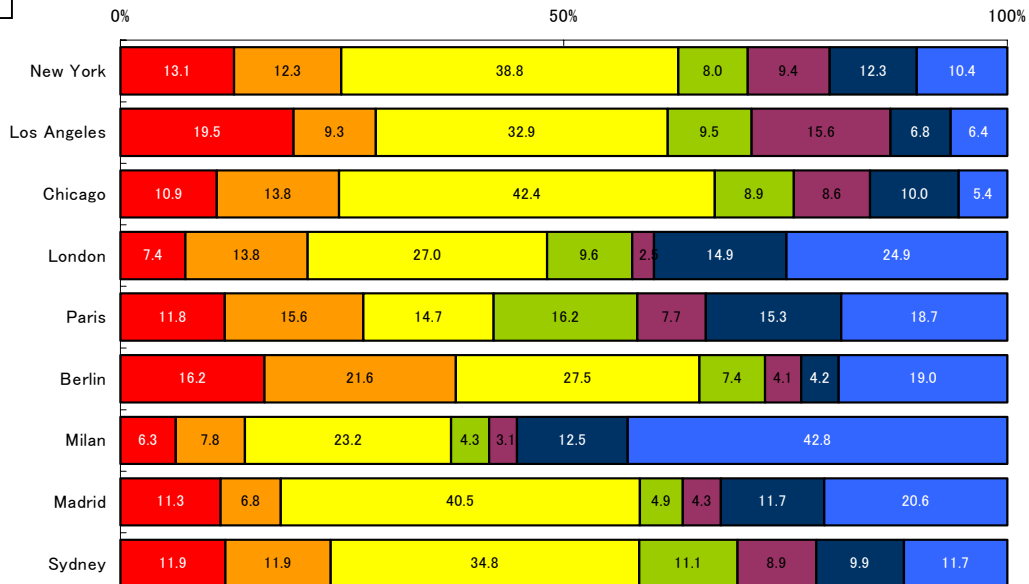


◆ Global 7 (G7) distribution by city

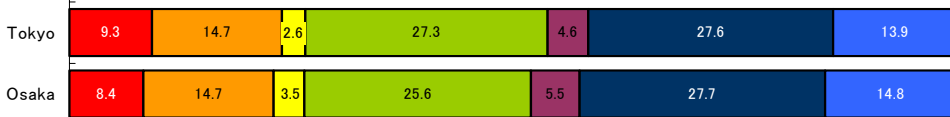
Asia



Europe  
USA

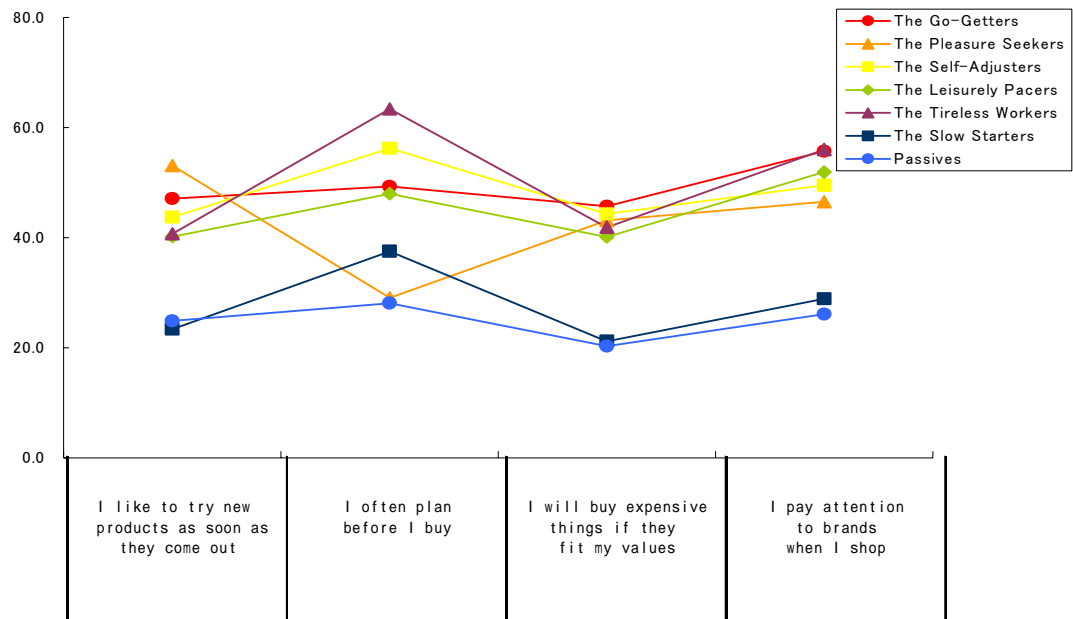


Japan



♦ Consumption behavior of the Global 7 (G7) groups

Go-Getters and Pleasure Seekers are the most enthusiastic about new products. These groups also tend to be prepared to lay down the cash on expensive items if they fit their values. The Self-Adjusters and Tireless Workers tend to shop in a rational and planned manner. Other than the Passives and Slow Starters, all groups take brands into consideration when they shop, but this is most especially so of the Go-Getters, Leisurely Pacers and Tireless Workers.



	I like to try new products as soon as they come out	I often plan before I buy	I will buy expensive things if they fit my values	I pay attention to brands when I shop
Asia Total	34.6	42.9	32.5	41.0
The Go-Getters	◎ 47.1	○ 49.3	◎ 45.7	◎ 55.7
The Pleasure Seekers	◎ 53.1	▼ 29.1	◎ 43.1	○ 46.5
The Self-Adjusters	○ 43.7	◎ 56.2	◎ 44.3	○ 49.5
The Leisurely Pacers	○ 40.2	○ 48.0	○ 40.1	◎ 51.9
The Tireless Workers	○ 40.7	◎ 63.4	○ 41.9	◎ 56.0
The Slow Starters	▼ 23.4	▽ 37.5	▼ 21.2	▼ 28.9
Passives	▽ 24.9	▼ 28.1	▼ 20.3	▼ 26.1

KEY ...11+ points higher than avg. ...5-10 point higher than avg. ...5-10 points lower than avg. ...11+ points lower than avg. (%)