

## Introducing our New Visual Identity



On May 1, 2008, Hakuhodo unveiled a radically new visual identity, reaffirming our mission and heralding the beginning of a new era for our 110-year-old agency. The unveiling coincided with the relocation of our headquarters to Akasaka Biz Tower, one of the premier creative business complexes in Tokyo.

The main element of our new VI, which also includes a new logotype and color scheme, is a new group logo, which the agency calls The Big Colon. Just as the punctuation mark colon establishes a relationship between two things, the Big Colon symbolizes our role as a vital link between brands, *sei-katsu-sha*\*, media and ideas. And just as a colon serves to focus attention on a subject, the Big Colon represents our ability to create buzz around the brands and companies we serve.

Brand : Idea : *Sei-katsu-sha* : Media : At the center of any configuration, Hakuhodo gives more meaning to the relationship, expanding the discourse and creating new avenues of dialogue.

Note : The Japanese term *sei-katsu-sha*, which literally means "living person," is the heart of Hakuhodo's advertising approach. In contrast to the term Japanese marketers typically use for consumer, *sei-katsu-sha* expresses a holistic person with a lifestyle, aspirations and dreams: in other words, an individual.

## Asian Women New Lives, New Aspirations

# Women in Asia

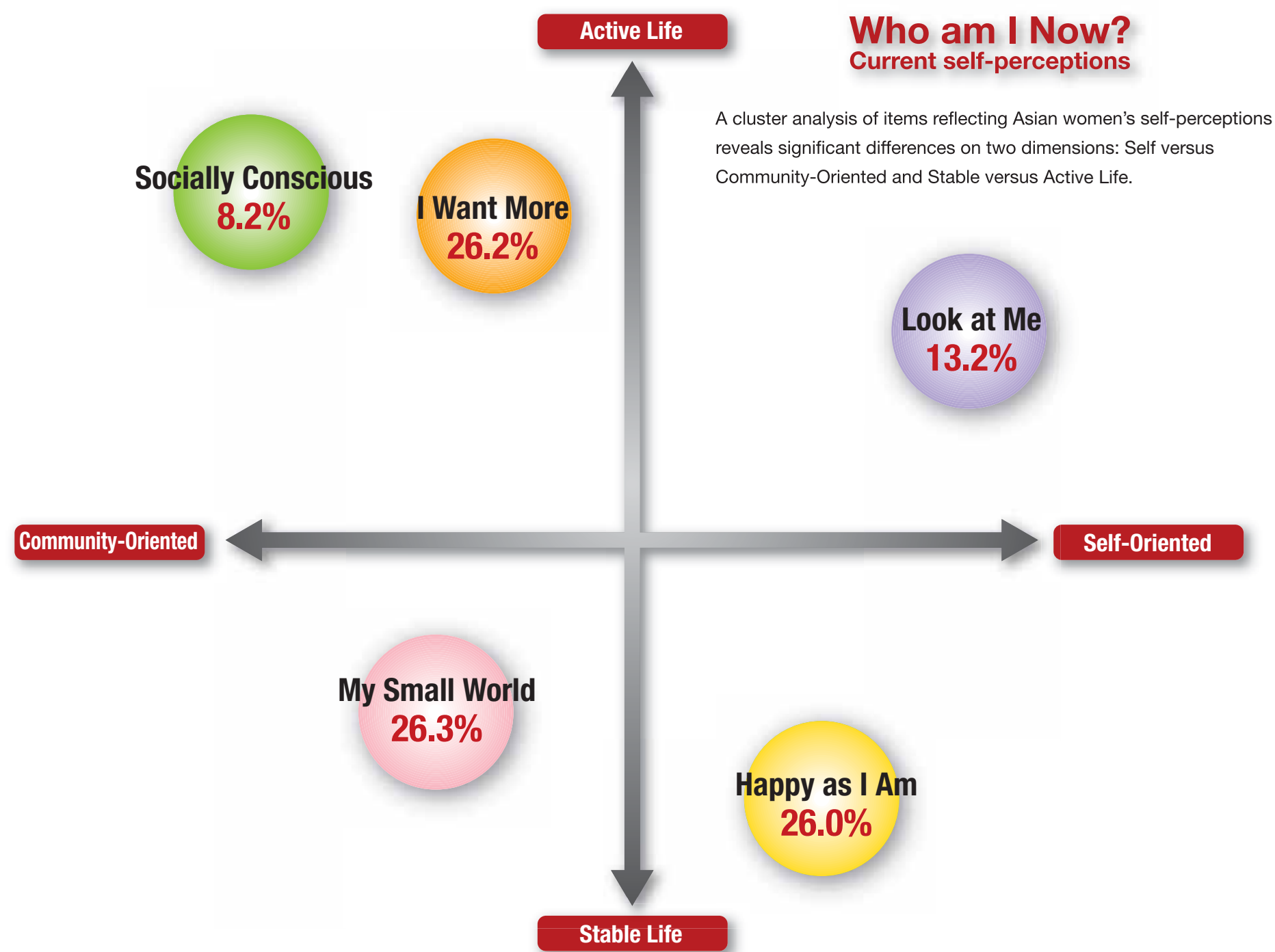


■  
■ **HAKUHODO**  
Global HABIT Survey



# How Asia's women see themselves

Approaching 40% seek status or want to enjoy life.  
But nearly one in 10 is socially conscious.



Careful attention to women is an integral part of Hakuhodo Global HABIT research on the lives and lifestyles of Asian *sei-katsu-sha* (consumers with a life). Nine years ago, in our study Asian Women, Their Lives, Their Dreams, our focus was women's aspirations, the types of women that they wanted to become. This year we wondered what had become of those aspirations. The figures cited above are the all-Asia percentages revealed by a cluster analysis of how Asian women now see their lives, the reality instead of the dream. Of particular interest is the emergence of the Socially Conscious cluster, composed of women for whom neither status-seeking nor immediate gratification brings sufficient meaning to their lives. At home, at work, when they shop, they are concerned about social and global issues and want to contribute to the betterment of society.

## Hakuhodo Global HABIT

Global HABIT extends the pioneering methods that make Hakuhodo HABIT one of the most respected consumer research data sources in Japan to 32 major cities around the world. Like HABIT, Global HABIT is a large-sample survey that provides a growing body of longitudinal data on consumer lifestyles, values, media contact, brand perceptions and purchasing behavior.

### Research Parameters

This study of Asian women uses Hakuhodo Global HABIT research methodology, conducted in twelve cities in 2007. Subjects were aged 20-39 and samples structured to include equal proportions of those in their early 20s (20-24), late 20s (25-29), early 30s (30-34), and late 30s (35-39). Total n was 2,055, broken down as follows: Hong Kong, 200; Singapore, 131; Taipei, 200; Seoul, 200; Kuala Lumpur, 129; Bangkok, 200; Manila, 128; Jakarta, 134; Ho Chi Minh City, 131; Mumbai, 200; Shanghai, 202; Tokyo, 200.

To learn more about Hakuhodo visit <http://www.hakuhodo.jp/>

## Five Clusters Reveal Distinct Goals and Aspirations

### Socially Conscious

Autonomous and community oriented, active at both home and work, her goal is a meaningful contribution to the betterment of society. Family and work are both important, but the character of her work is particularly important. She wants to be part of creating a better world.

**Self-Perceptions**

- Will do everything she can for society and friends
- Likes to try doing new things, even if there is risk involved
- A careful shopper who compares prices before she buys
- Has her own ways of gathering information
- Spends freely on self-education
- Eager to lend a helping hand to those in need
- More interested in self-cultivation than external appearance
- Prefers environment-friendly products and companies
- Wants work that demands sensitivity and knowledge

**Aspirations**

- Balance between work and family
- Highly educated and mature
- Successful in the workplace

**Demographics**

- Most common in Hong Kong, tend to be in early 20s or late 30s
- Most live in relatively large, 5-person households that include brothers and sisters
- Most jobs involve specialized expertise

### My Small World

What's important to her is relationships with family and others close to her. These relationships define her. Her attitudes are conservative; she prefers traditional gender roles. A happy family is her primary goal.

**Self-Perceptions**

- A small number of close friends instead of numerous shallower relationships
- Wants to do whatever she can for family and friends, those who make up her small world
- Thinks men should go out to work, women stay at home
- Prefers to dress casually when she goes out
- Doesn't worry about what she wears at home
- Prefers eating at home to going out to eat
- Prefers safety and nature to convenience in where she lives
- Spends money on children's education
- Spends money on check-ups and vaccinations

**Aspirations**

- Family is always No. 1
- To be cheerful and active

**Demographics**

- Most common in Manila and Jakarta
- Somewhat more common among those in their 30s
- Households include children from new born to six
- Few have full-time jobs; the majority are full-time housewives

### Happy as I Am

Satisfied with her life, she wants enough money to maintain her current lifestyle. She likes taking it easy but worries a bit about how other people see her.

**Self-Perceptions**

- Prefers stability
- Wants to stay healthy
- Wants to live as she likes
- Sees money as a sign of success
- Prefers an affluent lifestyle
- Would like to have work that others envy

**Aspirations**

- Forever young at heart
- Family is No. 1
- Warm and generous

**Demographics**

- Most common in Shanghai, then Seoul and Bangkok
- Few singles, most are married
- Most live in nuclear family households including husband and children from new born to six

### I Want More

To this woman, enjoying life is more important than work. Loving newness and fun, she wants a stylish lifestyle uniquely her own. She's loaded with curiosity, likes to try new things. Fashion is her way of expressing who she is.

**Self-Perceptions**

- Enjoys meeting new people
- Wants a life filled with fun and interesting things
- Enjoying life is more important than work
- Likes the stimulation provided by fashion and innovation
- Her fashions express her self-confidence
- Likes to try new things immediately
- Sees clothes as a way to express her personality
- Prefers a detached house that she can decorate as she likes

**Aspirations**

- Fiercely independent
- My style, my taste
- Expert at demonstrating creativity

**Demographics**

- Most common in Taipei, Hong Kong
- Most frequently in late 20s
- Mostly single; few are married
- Most work full time; few full-time housewives
- Most are white-collar office workers

### Look at Me

This woman is status-hungry. She wants to be the center of attention. She is constantly gathering information to feed her drive to rise higher. She is ambitious, concerned about her appearance, will spend freely to achieve her goals.

**Self-Perceptions**

- Wants high social status
- Wants everyone to pay attention to her
- Wants to be seen as a leader
- Wants to be attractive to members of the opposite sex
- Spends money on appearance, fashion, accessories
- Doesn't want to look the same as other people
- Is eager to be the first to know
- Wants a high-status job
- Prefers a workplace with a high-class atmosphere

**Aspirations**

- Elegant and refined
- Successful career

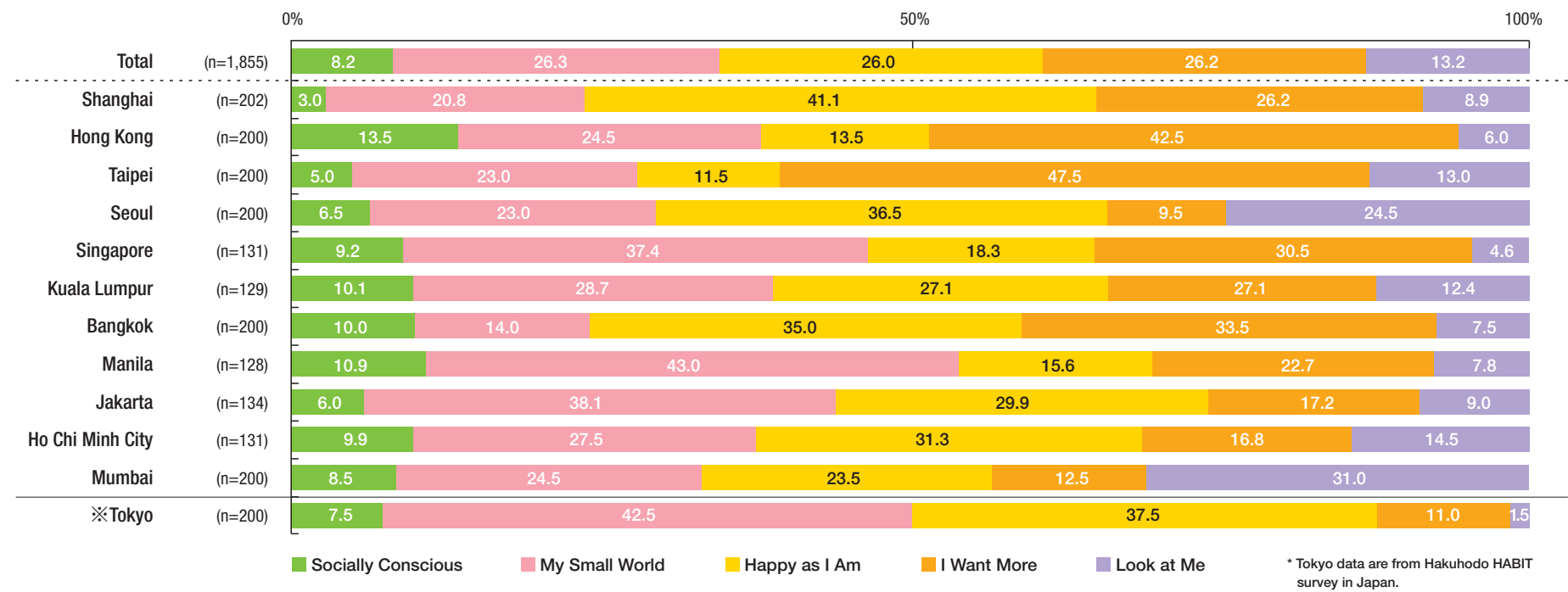
**Demographics**

- Most common in Mumbai and Seoul
- Most frequently in early 20s
- Most likely to be college educated



## Sizes of Clusters Vary Dramatically from City to City

Cluster Distribution by City



### 1 Socially Conscious is strongest in Hong Kong, but so is I Want More

The Socially Conscious cluster is largest in Hong Kong (13.5%). But Hong Kong (42.5%) is second only to Taipei (47.5%) in the size of its I Want More cluster and scores next to lowest in the status-conscious Look at Me cluster (6.0% vs 4.6% in Singapore).

### 2 My Small World largest in Manila, Tokyo, Jakarta and Singapore

One of our most intriguing comparisons reveals the prominence of women who treasure family and close relationships in Tokyo (42.5%) as well as in Manila (43%), Jakarta (38.1%) and Singapore (37.4%). The strength of this cluster in Manila and Jakarta suggest the persistence of traditional families and neighbourhoods. In Tokyo and Singapore the same trend may imply a reaction against the anonymity and alienation of Asia's most modern cities.

### 3 Shanghai No. 1, Tokyo No. 2 in Happy as I Am

Shanghai tops the table at 41.1%, but Tokyo (37.5%), Seoul (36.5%) and Bangkok (35%) are close behind. All are cities in which middle-class nuclear families are a solidly established component of the contemporary population. But the same might also be said of Taipei (11.5%) and Hong Kong (13.5%), where the Happy as I Am cluster is small. One possible explanation is anxiety about the future linked to political uncertainties.

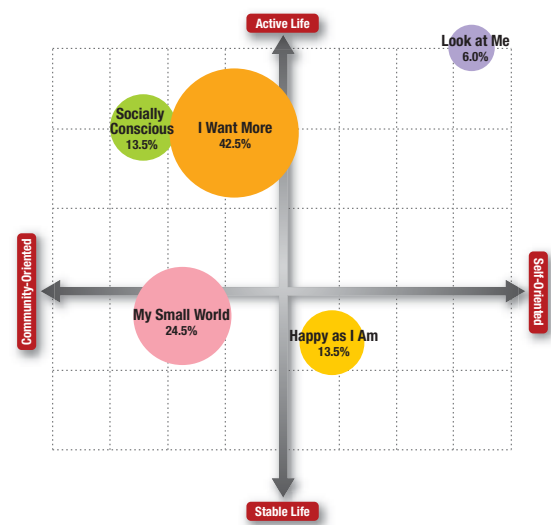
### 4 In Taipei and Hong Kong women want to enjoy life

As noted above, Taipei (47.5%) and Hong Kong (42.5%) boast the largest I Want More clusters. Taipei is the only city in which the combined score for I Want More (47.5%) and Look at Me (13%) clusters accounts for more than half of the women we surveyed.

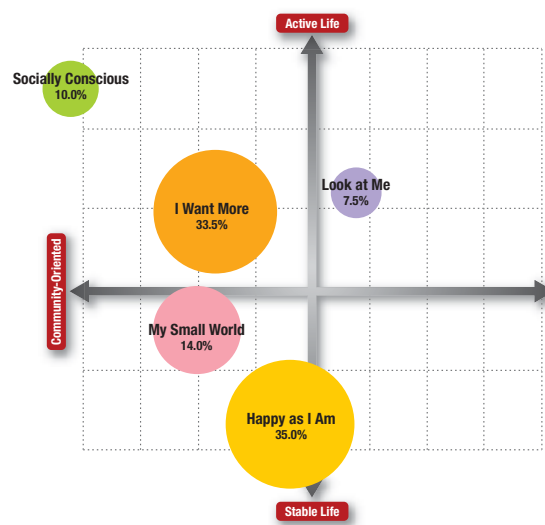
### 5 Mumbai and Seoul the most status-seeking

The highest proportions of Look at Me are in Mumbai (31.0%) and Seoul (24.5%). In all of the other cities the I Want More cluster is larger than the Look at Me, status-seeking cluster.

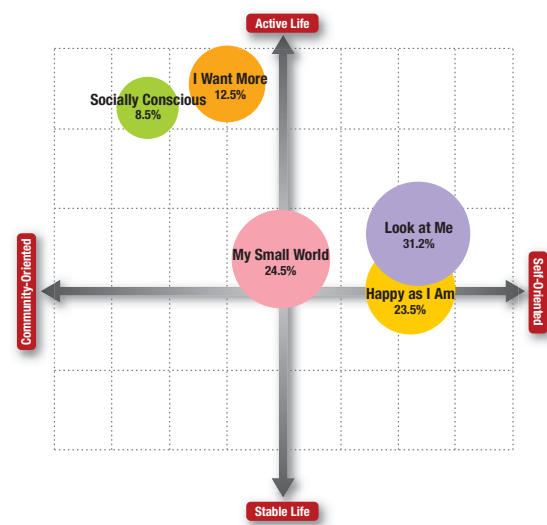
#### Hong Kong



#### Bangkok



#### Mumbai

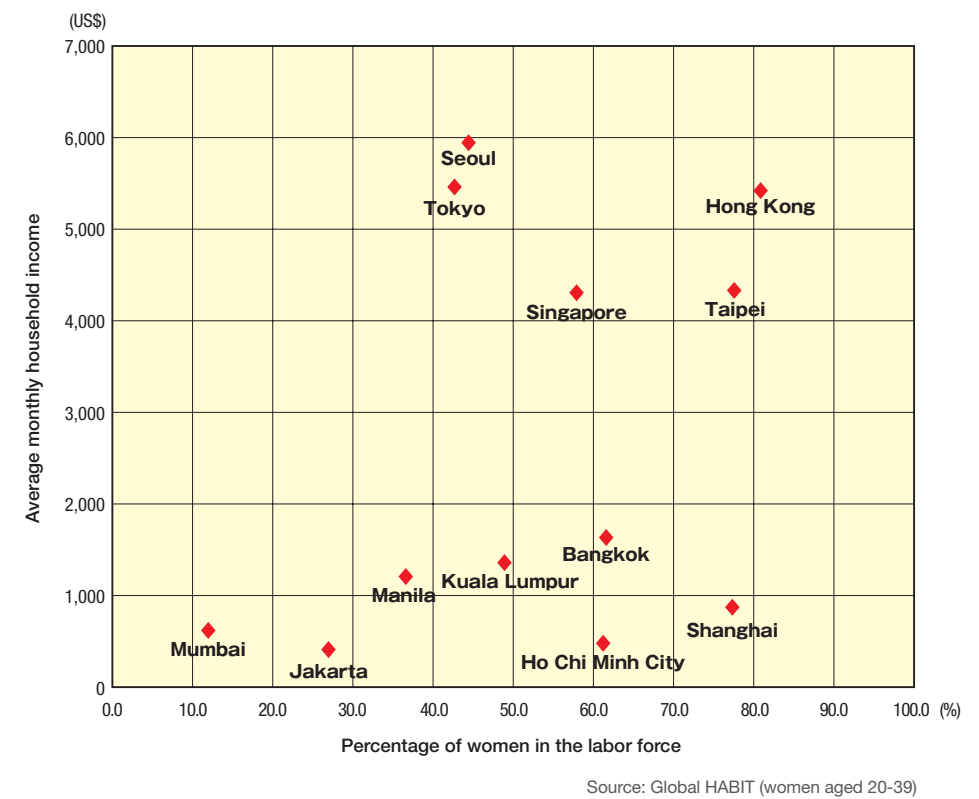


## The Lives Asia's Women Lead Also Vary Dramatically

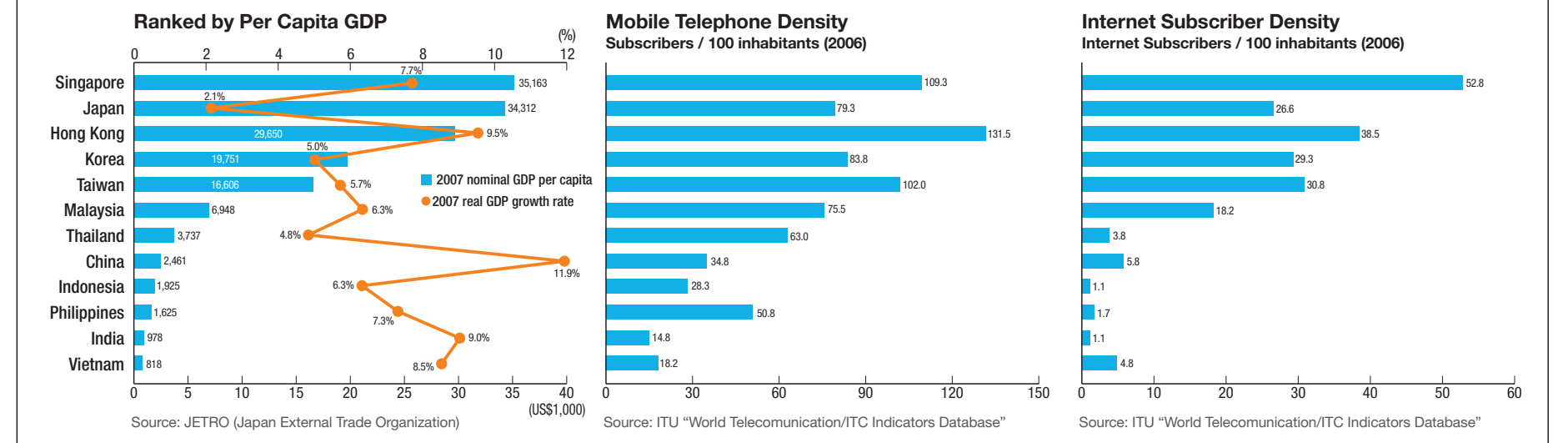
The countries represented by the cities covered by this study differ dramatically in the basic material circumstances that affect women's lives. In US dollar terms, per capita GDP ranges from US\$818 in Vietnam to US\$35,163 in Singapore. In the cities in our sample, monthly household income ranges from US\$447 in Jakarta to US\$5,989 in Seoul. Women's participation in the labor force ranges from 12% in Mumbai to 81% in Hong Kong.

Turning to likely shopping habits, for women in both the My Small World and Happy as I Am clusters, family is No. 1. These two clusters form a supercluster that we are calling For Family women whose purchases conform to a traditional household-focused model. In contrast, I Want More and Look at Me form a supercluster that we label For Me, whose members shop for goods and services that they themselves will enjoy. Comparing these two superclusters across our twelve cities reveals a clear and dramatic pattern. The red line is For Family, the green line is For Me.

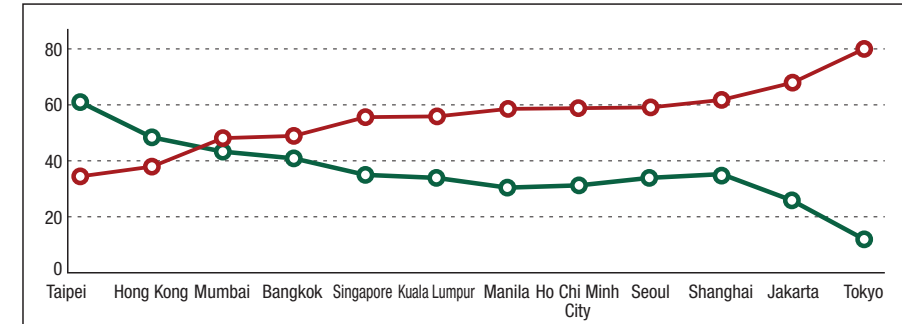
The surprises here are at the two ends of the graph. On the left, Taipei and Hong Kong are the only two cities in which For Me is larger than For Family. On the right, the gap is reversed and even more dramatic in Tokyo.



Source: Global HABIT (women aged 20-39)



For Family vs For Me



For Family = My Small World + Happy as I Am  
For Me = I Want More + Look at Me

Source: Global HABIT

Clusters and Money

|                    | Current Spending   |        |                    | Desired Spending   |        |                    |
|--------------------|--------------------|--------|--------------------|--------------------|--------|--------------------|
|                    | Education for Kids | Beauty | Education for Self | Education for Kids | Beauty | Education for Self |
| Socially Conscious | 37.9               | 58.2   | 39.2               | 45.8               | 56.9   | 49.7               |
| My Small World     | 40.0               | 47.1   | 31.4               | 45.1               | 50.6   | 35.0               |
| Happy as I Am      | 34.6               | 47.8   | 26.5               | 40.2               | 47.6   | 28.8               |
| I Want More        | 29.8               | 59.5   | 33.5               | 37.7               | 60.9   | 38.3               |
| Look at Me         | 32.7               | 59.2   | 33.9               | 37.1               | 55.5   | 36.3               |

Source: Global HABIT

What, then, of the emerging Socially Conscious cluster? "Socially Conscious" does not mean self-sacrificing. Socially Conscious women are much more likely than members of other clusters to want to do something for society. But from Lifestyle to Consumption, Information and Job, they score high on every dimension. They are, however, less likely than Look at Me to want a high-status job.

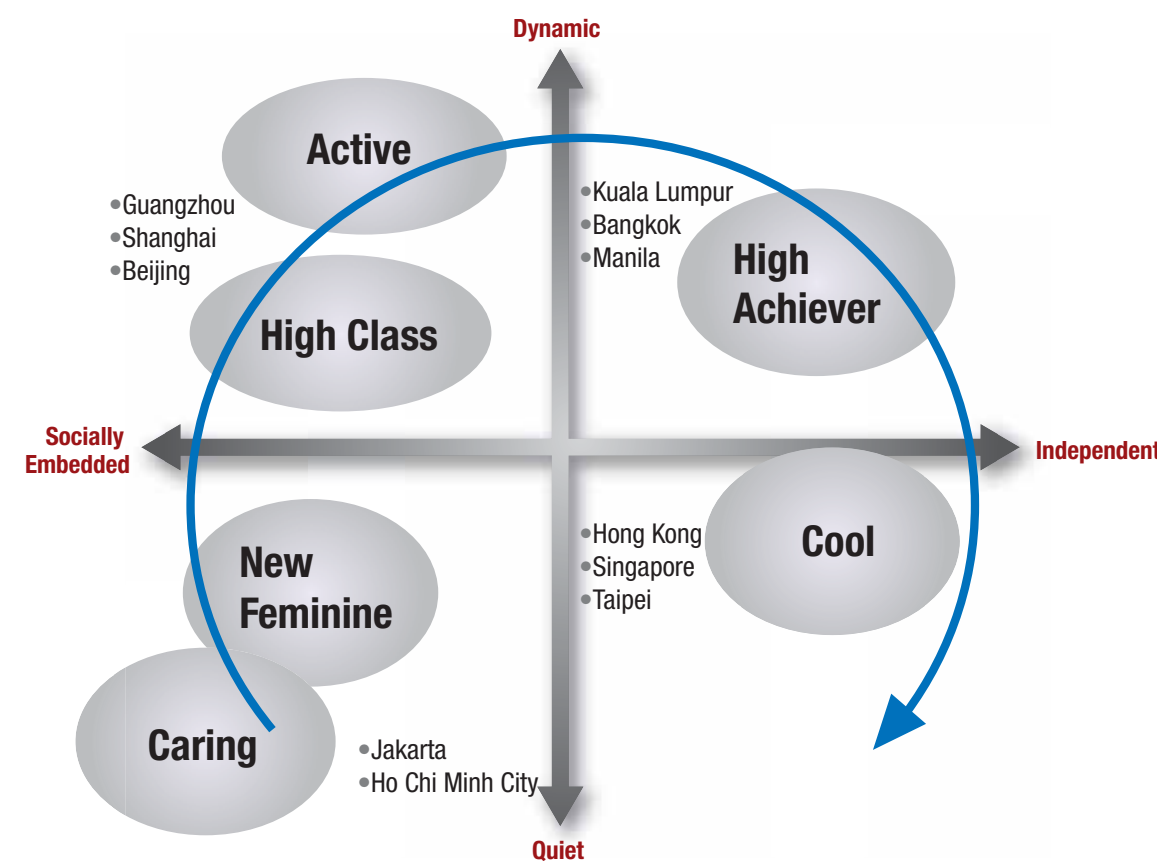
Clusters and the Lives They Lead

|                    | Lifestyle           |                 |                                   | Consumption                                    |   |                                       | Information                   |                        |  | Job                      |                                     |                         |                              |
|--------------------|---------------------|-----------------|-----------------------------------|--|---|---------------------------------------|-------------------------------|------------------------|--|--------------------------|-------------------------------------|-------------------------|------------------------------|
|                    | Wants to enjoy life | Wants stability | Wants to do something for society | Will buy what she likes, even if price is high | Careful shopper; mostly plans what she buys | Prefers environment-friendly products | Wants to be the first to know | Word of mouth is vital | Has her own ways to gather information | Wants to use her talents | Wants work that requires good taste | Wants a high-status job | Wants a job that others envy |
| Socially Conscious | 81.7                | 81.0            | 86.3                              | 51.6   | 67.3  | 51.6                                  | 42.5                          | 64.1                   | 51.6                                   | 90.2                     | 73.2                                | 68.0                    | 52.9                         |
| My Small World     | 39.1                | 63.9            | 51.2                              | 26.4   | 40.6  | 25.2                                  | 27.7                          | 49.4                   | 34.4                                   | 83.2                     | 59.2                                | 63.9                    | 45.1                         |
| Happy as I Am      | 36.4                | 64.4            | 14.5                              | 20.7   | 37.9  | 14.5                                  | 19.0                          | 38.5                   | 34.2                                   | 79.1                     | 60.2                                | 66.0                    | 54.7                         |
| I Want More        | 54.1                | 29.4            | 29.6                              | 30.0   | 33.3  | 21.0                                  | 21.6                          | 51.6                   | 30.9                                   | 82.3                     | 54.7                                | 64.2                    | 52.3                         |
| Look at Me         | 39.6                | 36.7            | 29.8                              | 29.4   | 35.9  | 18.0                                  | 37.1                          | 48.6                   | 34.7                                   | 83.3                     | 71.0                                | 81.6                    | 63.3                         |

Source: Global HABIT

## Their Dreams Nine Years Ago

### Who They Wanted to Be



When Hakuhodo's first study of Asian women was conducted nine years ago, the aspirations we identified occupied distinct positions when cities were mapped comparing average annual income with the percentage of women employed. The Caring and New Feminine clusters, composed of women whose ideals were traditional or modern family life, were concentrated in Jakarta and Ho Chi Minh City, cities where both incomes and percentage of women employed were low. Active and High-Class aspirations were concentrated in cities in mainland China, where, while incomes were still low, female participation in the labor force was high. Women who aspired to be High Achievers were more common in Manila, Kuala Lumpur and Bangkok, where female participation in the labor force was lower than in mainland China but incomes were higher. The Cool segment, disillusioned with the pursuit of status and career and highly focused on self-expression, were concentrated in Singapore, Hong Kong, and Taipei, where incomes were dramatically higher and labor force participation slightly lower than in mainland China.

Based on these findings, we developed the following model: 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.

**Hakuhodo Global HABIT** is an annual survey conducted in 32 major cities around the world, providing information that allows comparisons between cities and observation of trends in individual cities. This single-source survey focuses on respondents' lifestyles, value systems, media preferences, purchases, usage of and perceptions toward a variety of brands and goods. Armed with this data, users and supporters (i.e. future customers, adherents, and fans) of brands can be analyzed.

#### Cities:

Shanghai, Beijing, Guangzhou, Dalian, Shenyang, Wuhan, Chengdu, Fuzhou, Hong Kong, Taipei, Bangkok, Seoul, Singapore, Kuala Lumpur, Metro Manila, Jakarta, Ho Chi Minh City, Delhi, Mumbai, Sydney, New York, Los Angeles, Chicago, London, Paris, Berlin, Frankfurt, Milan, Madrid, Moscow, Tokyo, Osaka

#### Respondents:

Either 500 or 800 males and females aged 15–54 per city, except in Japan where 5,000 persons in total were interviewed in Tokyo and Osaka. The total number of persons interviewed was 21,000 worldwide. Based on screenings by household income, survey responses were obtained from persons in the middle/high income bracket of each city (50–85% of the urban population).

Power *sei-katsu-sha* account for approx. the top 10% of income earners in each city. Due to their strong spending habits, active lifestyles, and high information awareness, power *sei-katsu-sha* are consumption leaders with significant power in the market. By paying attention to such power *sei-katsu-sha*, it is now possible to analyze the relationships between brands and consumers with strong purchasing power.

#### Main Items Surveyed (some apply only to China and other Asian countries):

##### • *Sei-katsu-sha*\* characteristics

Demographics, lifestyle, media contact, information gathering skills, consumer habits, hobbies, sports, travel, ownership of durable goods, brand recognition, travel, housing, and more.

##### • Products and brands

Product usage and brand evaluation (using Hakuhodo's own Bonding & Voice branding metrics): Passenger cars, motorcycles, AV products, home electrical appliances, personal computers, printers, mobile phones, digital cameras, cameras, copiers, wristwatches, game consoles, alcoholic drinks, non-alcoholic drinks, cigarettes, toiletries, cosmetics, and more.

#### Survey period:

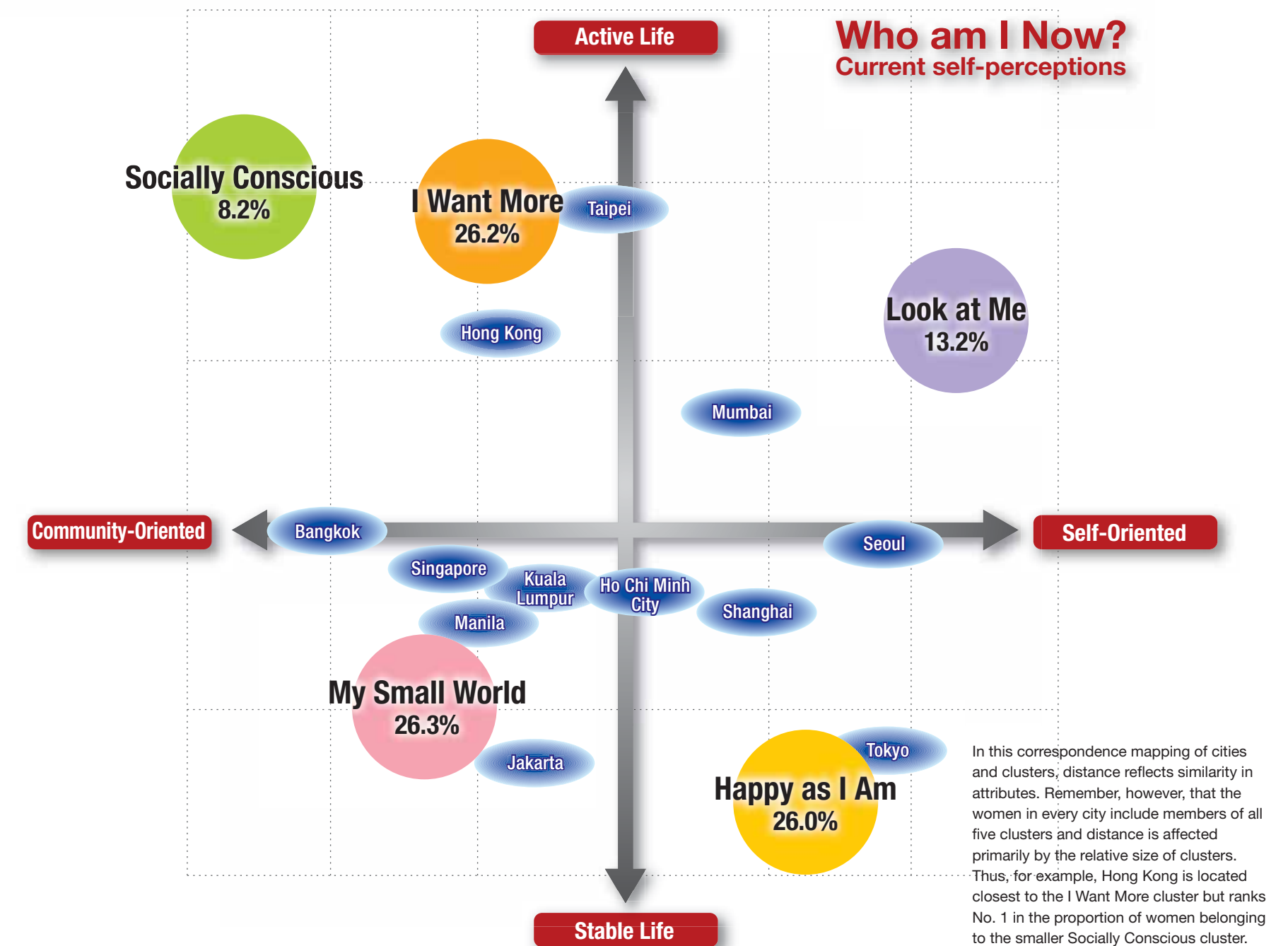
June–September 2007

##### \* *Sei-katsu-sha*

*Sei-katsu-sha* are more than simply consumers, just as people's lives and lifestyles include more than just shopping. Hakuhodo introduced this term in the 1980s to emphasize our commitment to a comprehensive, 360-degree perspective on consumers' lives.



## Their Realities Nine Years Later



Nine years ago, a simple spiral model appeared to explain the ideal types to which Asian women aspired. Now, however, the picture our data reveal appears more complex. Throughout Asia, economic growth, the rising participation of women in society, and advances in information technology have increased the diversity of women's lives.

Some broad patterns do, however, appear. Two of our clusters, My Small World and Happy as I Am share a common focus on family. In this respect they contrast sharply with the I Want More and Look at Me clusters, whose focus is on themselves. For Family or For Me? That is the basic choice that shapes both values and behavior in all four clusters.

Now, moreover, a new Socially Conscious type of woman is challenging this classic either/or choice, constructing lives and lifestyles with room for both family and self and a wider world as well. For these women neither a small world of one's own or happiness with their current lives is enough. Status-seeking is too exhausting and filled with frustration. But only wanting more for themselves doesn't satisfy. It still leaves something lacking.

These Socially Conscious women are taking traditional Caring values into the public arena, participating in volunteer activities, shopping for environment-friendly goods, or finding other ways to create a better tomorrow for others as well as themselves. Whether we see them as a market niche or as trendsetters with growing influence, marketers cannot afford to ignore them.

As marketers consider the five clusters revealed by this analysis, one approach to developing effective marketing strategies will be to focus on the similarities shared by women in the same cluster who live in different parts of Asia. Consideration should also be given, however, to the distribution of clusters in particular markets. Knowing which clusters are dominant in different markets will be essential information for those developing detailed communication and marketing plans.