Introducing our New Visual Identity

HAKUHODO

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.

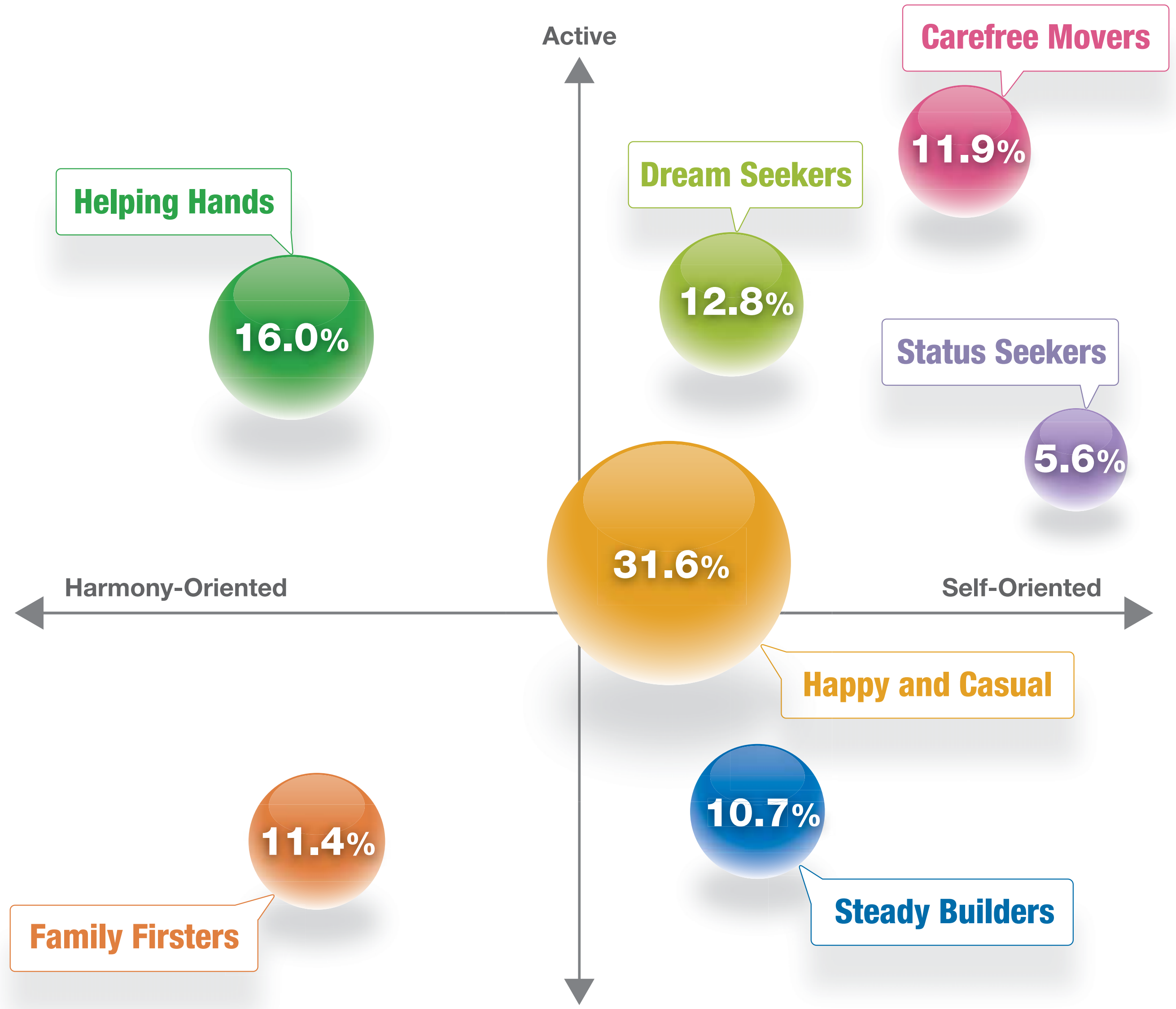
The main element of our new VI, which also includes a new logotype and color scheme, is a new group logo, which the agency calls The Big Colon. Just as the punctuation mark colon establishes a relationship between two things, the Big Colon symbolizes our role as a vital link between brands, *sei-katsu-sha**, 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 20-Somethings: Seven Clusters in 11 Cities

Innovative, trendsetting Carefree Movers account for 11.9% overall



A cluster analysis of items reflecting Asian 20-sometings' self-perceptions reveals significant differences on two dimensions: Self- versus Harmony-Oriented and Active versus Calm.

As growing markets in Asia have become increasingly important for global businesses, Hakuhodo has been a leader in research on Asian consumers. Last year we focused on Asian women, identifying the five clusters described in *Asian Women—New Lives, New Aspirations*. In this study we used Hakuhodo Global HABIT data from 11 cities to analyze the 20-somethings who will shape future markets. We have identified seven distinct 20-something clusters that appear in cities throughout Asia. Marketing strategies can target one or more. Marketers must, however, keep in mind whether gender and generation gaps are large or small and how these clusters are distributed.

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 33 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

In this report data from Tokyo are combined with those from 10 cities in Asia included in Hakuhodo Global HABIT 2008. Our primary focus is 20-somethings (aged 20–29). Our stratified sample includes approximately equal numbers of men and women in their early twenties (20–24) and late twenties (25–29) in a sample whose total n=1,870. By city, the sample is divided as follows: Hong Kong 200, Singapore 131, Taipei 200, Kuala Lumpur 135, Bangkok 206, Manila 128, Jakarta 134, Ho Chi Minh City 130, Mumbai 204, Shanghai 202, and Tokyo 200.

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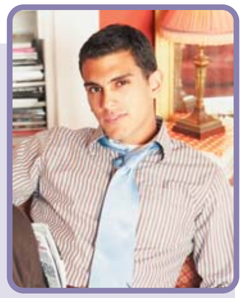
Seven Clusters with Different Tastes and Lifestyles

Carefree Movers (11.9%, n=199)

Want to be stylish and refined, with strong desire to consume and high sensitivity to information. Seek recognition from others.

- Looking for pleasure and novelty, want to enjoy life
- Want recognition and high regard from others
- Want a life filled with stimulation from fashionable, new things
- See brands as signs of quality
- Attach importance to shops that give useful advice
- See word-of-mouth as an important medium
- Can't live without their mobile phones
- Frequently look for information on company Websites
- Being able to demonstrate ability and taste is important
- Clothes are one way to show individuality
- Spend money on socializing (including eating and drinking)
- Spend on hobbies and leisure
- Want to spend more on dining out and ordinary clothing
- Often use the Internet, which they trust and find interesting
- Often read magazines, which they trust and find interesting
- Frequently read domestic and foreign fashion magazines
- Frequently visit and comment on blogs, watch videos
- High percentage have traveled abroad on business or pleasure within last year
- Both men and women seek elegance and refinement
- Men want to be creative and skillful communicators
- Slightly smaller percentage of women in early 20s
- High percentages of students, full-time and white-collar workers
- High percentages of singles, three and four-person households, living with parents
- Highest percentages of college graduates and high household income

Status Seekers (5.6%, n=93)



Have strong desire to succeed and achieve high social position. Want to stay young forever, both mentally and physically.

- Money is a status symbol
- Want high social status
- Want to be forever young in both body and spirit
- Want a high-status job
- Spend freely on fashion, accessories, and clothes to go out in
- Often watch TV, trust it, and know a lot about it
- Few have traveled overseas on business or pleasure within last year
- Both men and women want to be elegant and refined
- Women want successful careers
- Men want to be youthful
- High percentages of early-20s men, students and college graduates
- Low percentage of white-collar workers

Dream Seekers (12.8%, n=214)

People with high aspirations, still groping for ways to achieve them. They combine traditional values with modern, convenience-seeking flexibility.

- Like being the center of attention
- Think men should work, women should take care of the house
- Don't like owning what many others own
- Leave TV and radio on all the time, regardless of program
- A slower-paced life when older would be ideal
- Prefer a workplace with a top-class atmosphere
- Convenience store food items are essential
- Both men and women want to be mature and well brought up
- High percentages of late-20s, students, full-time housewives and married
- A majority live in large households of six members or more

Steady Builders (10.7%, n=178)

These smart consumers work hard to gather information in their quest to achieve stable and economically affluent lives.

- Want a stable life
- Want to be economically affluent
- Carefully compare prices before buying
- Supermarkets and department stores are important sources of product information
- Many look for bargains when buying clothes
- Want to save
- Use Internet for news, chat, and TV
- Both men and women have strong desire for independence
- Women want both job and family
- Men want to be successful at work
- High percentages of married, unemployed, high-school graduates

Helping Hands (16.0%, n=268)

Helping those in trouble, respecting elders, and other traditional values are important. Highly conscious of health and food safety. Saving for the future instead of spending today.

- Want to help those in trouble or weaker than self
- Save for the future instead of spending now
- Want an age-appropriate appearance
- Want to grow wiser with age
- Frequently consume natural foods
- Health-conscious, eat carefully
- Both men and women want to put family first
- Women want to be creative and skillful communicators
- Men have strong desire for independence
- High percentages of men, self-employed, small business owners, married

Family Firsters (11.4%, n=191)

Family happiness is their top priority. Concerned about family health, safety, and immediate environment. Gather information related to these topics. Practical shoppers who look for specific effects and features.

- Family happiness is No. 1
- Concerned about issues in immediate environment
- A higher percentage are careful shoppers
- Have their own ways to gather information
- Give more weight to function than design when making purchases
- Want to spend on preventive medicine
- Both men and women want to put family first
- Both men and women want both job and family
- Higher percentages of women, late-20s, married, full-time housewives, high-school graduates

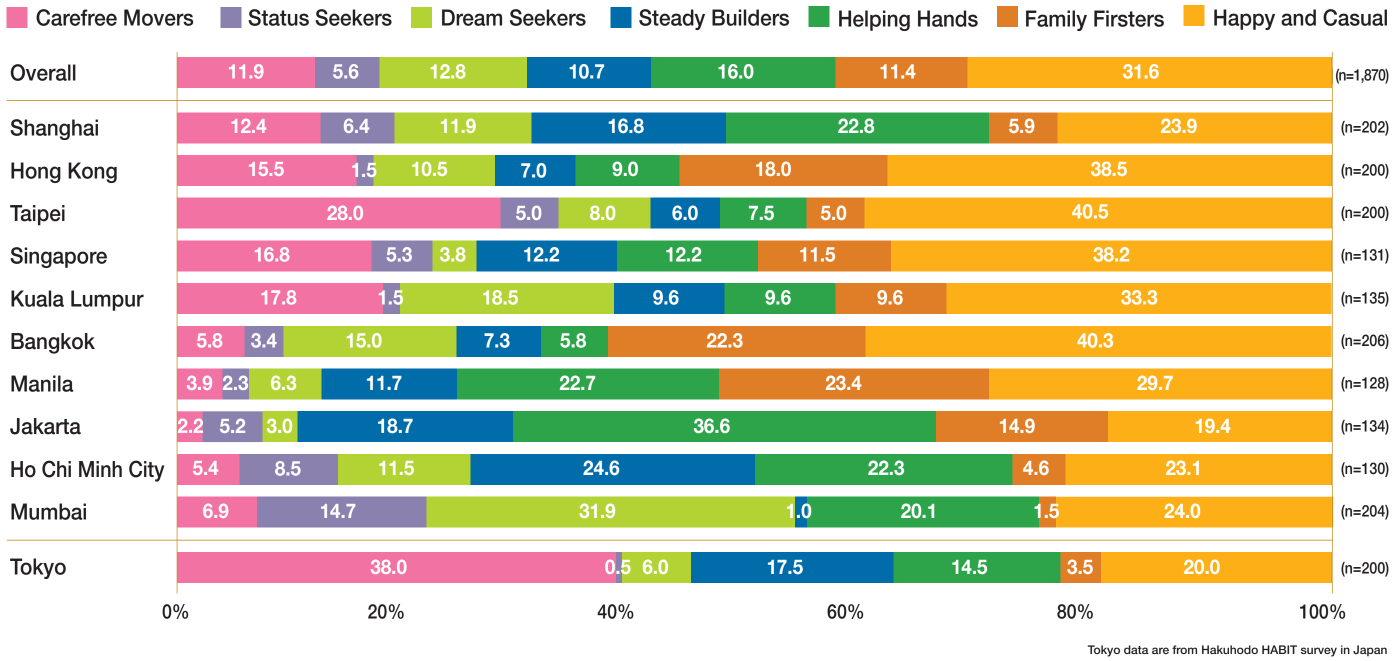
Happy and Casual (31.6%, n=527)

Ordinary people who want to enjoy life. Actively pursue fun, but otherwise let events take their course. Don't want to give up their current, comfortable lives.

- Seek pleasure and fun, want to enjoy life
- Want to live as they like
- Can't think of anything they particularly want just now
- Spend on everyday clothing and everyday meals
- Want to save
- Frequently use the Internet
- Both men and women want their own style and tastes
- Women want to be youthful
- Slightly higher percentages are single, full-time or white-collar workers, college graduates

Defining the Shape of Local Markets: Cluster Distribution by City

Seven Clusters of Asian 20-Somethings in 11 Cities



The Carefree Movers and Happy and Casual clusters are large in developed markets but smaller in cities where development is still underway

As our chart of cluster distribution broken down by city illustrates, all seven clusters appear in all eleven cities. But whether clusters are large or small varies from city to city. The percentage of Happy and Casual varies from just over 40% in Taipei and Bangkok to 19.4% in Jakarta. Here, too, we see a clear division between a top five, Taipei, Bangkok, Hong Kong, Singapore, and Kuala Lumpur, where a third or more of our subjects belong to this cluster and a lower six, Manila, Mumbai, Ho Chi Minh City, Shanghai, Tokyo, and Jakarta. Tokyo (20.0%) ranks just above Jakarta (19.4%) in the size of this cluster of largely satisfied consumers. These rankings closely parallel those for the Carefree Movers cluster. In this case, however, Tokyo (38.0%) tops the list, with Taipei (28.0%) in second place. Only in Tokyo is the fashion-and-trend conscious Carefree Movers cluster larger than the Happy and Casual (20.0%) cluster.

In contrast to Carefree Movers, the Status Seekers cluster is largest in Mumbai (14.7%) and smallest in Hong Kong (1.5%) and Tokyo (0.5%). Overall, the distribution of Status Seekers parallels that of Steady Builders. Mumbai also has the largest proportion of Dream Seekers (31.9%). Combining Status Seekers (14.7%), Carefree Movers (6.9%) and Dream Seekers (31.9%) yields a total of 53.5%, over twice the percentage of Happy and Casuals (24.0%). Mumbai has high potential for marketers looking for young, aspiring consumers to power significant growth.

The relatively small sizes of the Helping Hands and Family Firsters clusters suggest that as a new middle class emerges, traditional values focused on neighborhood and family are losing ground. Helping Hands (16.0% overall) range from 36.6% in Jakarta, which ranks lowest in terms of Happy and Casual (19.4%) and Carefree Movers (2.2%) to lows of 7.5% in Taipei and 5.8% in Bangkok, where the Happy and Casuals share is over 40%. Family Firsters (11.4% overall) range from highs in Manila (23.4%) and Bangkok (22.3%) to lows in Tokyo (3.5%) and Mumbai (1.5%).

Hakuhodo Global HABIT is an annual survey conducted in 33 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 and 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, Hangzhou, Ningbo, 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:
May–July 2008

* *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.

Global HABIT
Hakuhodo Audience and Brand-User's Index for Targeting

Men vs. Women in Their 20s

We began by analyzing how the attitudes of men and women vary from country to country, and this analysis alone revealed striking differences among the cities we examined. Our analysis included lifestyles, consumption, information, and current and desired spending.

In the Men vs. Women in Three Cities table we see items on which the scores of men and women differed by more than 8%. Items in blue are those where men scored higher. Items in red are those where women's scores were higher. Items where the gap was less than 8% are not included in this table.

Men vs. Women in Three Cities

Hong Kong
Active Men, Active Women

Item	Men	Women
Can't survive without mobile phone	71.0	80.0
Healthy lifestyle	64.0	74.0
Stable everyday life	55.0	69.0
Job allows self-expression	43.0	60.0
Pay high price for preferred items	43.0	59.0
Relationships are important	40.0	57.0
Point-of-sale information important	40.0	56.0
Leave TV on all the time	39.0	53.0
Eager to try new products	37.0	52.0
Confident when fashionably dressed	41.0	51.0
Want to help others in need	43.0	51.0
Advertising is information source	41.0	51.0
Want to do good for society, others	37.0	45.0
Make impulse purchases	28.0	44.0
Personal taste and style	32.0	41.0
Trendy stimulation	28.0	40.0
Pass on new information	31.0	40.0
Conscious of which country a product is made in	24.0	39.0
Lose interest in popular items	14.0	22.0
Spend on everyday clothing	80.0	91.0
Spend on beauty	49.0	76.0
Spend on personal gifts	52.0	65.0
Spend on clothing to go out in	47.0	59.0
Spend on fashion	16.0	37.0
Want to spend on everyday clothing	83.0	91.0
Want to spend on beauty	49.0	83.0
Want to spend on clothing to go out in	50.0	70.0
Want to spend on personal gifts	54.0	67.0
Want to spend on fashion	17.0	41.0
Find information on company Websites	67.0	49.0
Make a life plan	47.0	32.0
Careful shopper	43.0	26.0
Take risks	42.0	20.0
Uneasy without reading AM paper	37.0	24.0
Environmental issues are important	33.0	25.0
Want to be first to acquire information	32.0	24.0
Knowledgeable about products	24.0	12.0
Spend on telecom (mobile phone, Internet)	88.0	79.0
Spend on leisure (excl. travel)	65.0	52.0
Spend on self-improvement	63.0	39.0
Spend on stocks, etc.	58.0	43.0
Spend on home electronics	49.0	29.0
Spend on interior decoration	30.0	21.0
Want to spend on self-improvement	68.0	60.0
Want to spend on stocks, etc.	66.0	57.0
Want to spend on leisure (excl. travel)	62.0	47.0
Want to spend on home electronics	54.0	30.0
Want to spend on interior decoration	43.0	30.0
Want to spend on car	19.0	6.0

Bangkok
Active Women

Item	Men	Women
Carefully compare prices before buying	45.3	67.0
Healthy lifestyle	47.2	57.0
Family happiness No. 1	34.0	55.0
Relationships are important	45.3	55.0
Channel switcher (TV)	35.8	54.0
Knowledgeable about products	34.9	43.0
Thrifty, strict with self	22.6	39.0
Eager to try new products	23.6	36.0
Environmental issues are important	22.6	34.0
Want to be highly regarded	18.9	29.0
Uneasy about unadvertised products	20.8	29.0
Personal taste and style	14.2	28.0
Self-cultivation over appearance	15.1	28.0
Enjoying life over work	18.9	27.0
Spend on beauty	13.2	55.0
Spend on children's education	11.3	31.0
Want to spend on beauty	12.3	57.0
Want to spend on preventive medicine	41.5	52.0
Want to spend on children's education	31.1	43.0
Want to spend on health, relaxation	30.2	39.0
Want to spend on fashion	8.5	23.0
Spend on travel	50.0	35.0
Spend on car	46.2	27.0
Spend on clothing to go out in	45.3	37.0
Spend on self-improvement	30.2	21.0
Spend on ceremonial occasions	23.6	15.0
Want to spend on clothing to go out in	58.5	46.0
Want to spend on car	55.7	38.0
Want to spend on socializing	47.2	39.0
Want to spend on self-improvement	35.8	25.0

Mumbai
Active Men

Item	Men	Women
Knowledgeable about products	61.2	70.3
Carefully compare prices before buying	40.8	53.5
Want to be first to acquire information	35.0	52.5
Want to do good for society, others	35.9	46.5
Self-cultivation over appearance	26.2	35.6
Pass on new information	16.5	26.7
Spend on fashion	44.7	58.4
Spend on travel	36.9	47.5
Spend on children's education	21.4	39.6
Spend on health, relaxation	19.4	30.7
Want to spend on fashion	38.8	52.5
Want to spend on travel	29.1	37.6
Want to spend on children's education	15.5	35.6
Sales staff advice important	53.4	36.6
Brands mean good products	50.5	40.6
Enjoy meeting new people	45.6	35.6
Leave radio on all the time	44.7	33.7
Want to live without waste	41.7	32.7
Want to be well off	38.8	27.7
Lose interest in popular items	38.8	24.8
Sacrifice family time for success	35.0	24.8
Prefer foreign to own-country's products	32.0	23.8
Confident when fashionably dressed	31.1	19.8
Spend on clothing to go out in	63.1	52.5
Spend on home electronics	37.9	25.7
Spend on hobbies	35.0	21.8
Spend on self-improvement	31.1	21.8
Want to spend on clothing to go out in	60.2	50.5
Want to spend on home electronics	34.0	22.8
Want to spend on hobbies	31.1	16.8
Want to spend on self-improvement	31.1	19.8
Want to spend on socializing	23.3	13.9

Hong Kong

In Hong Kong, lifestyle items on which men score higher than women include willingness to take risks to try new things and having a life plan. Women scored higher on wanting jobs that allow self-expression, wanting to cultivate their tastes and sensibilities, and wanting to help others in need. Turning to consumption, men score higher on detailed knowledge of many products, women on paying a high price for items they like and quickly trying out new products. In the information category, men scored higher on turning to company Websites for information; women scored higher on importance of point-of-sale information and not being able to survive without mobile phones. In Hong Kong, both men and women are active consumers, but gender differences remain striking.

Bangkok

In Bangkok, women score higher on more items than men. These include emphasizing self-cultivation over external appearance, seeking recognition from others, being quick to try out new products, and having detailed knowledge of many products. In Bangkok, women are more active consumers than men.

Mumbai

In Mumbai it is the men who are the more active consumers, scoring high on such items as feeling self-confident when fashionably dressed, enjoying meeting new people, attaching importance to stores that give point-of-sale information, and seeing brands as signs of quality.

As indicated by these examples, we see clear differences between cities, from Hong Kong, where gender differences are striking but both men and women in their 20s are active consumers, to Bangkok, where women are more active, and Mumbai, where the active consumers are more likely to be men. Applying the same type of analysis to Kuala Lumpur we find that women score higher on lifestyle and consumption-related items, while men score higher on information, current spending and desired spending-related items. There are even cities like Tokyo, where women score higher across the board.

Asian 20-Somethings and Other Age Cohorts

20s vs. 30s and 40s in Six Cities

Hong Kong

Pattern			20s
	Value and Lifestyle	Channel switcher (TV)	37.5
		Impulse purchases	36.0
		Pass on new information	35.5
	Current Spending	Ordinary clothing	85.5
		Dining out	77.5
		Socializing	75.0
		Hobbies	73.5
		Personal gifts	58.5
		Clothing to go out in	53.0
		Self-improvement	51.0
	Want to Spend on	Ordinary clothing	87.0
		Dining out	73.0
		Hobbies	73.0
		Socializing	71.0
		Self-improvement	64.0
		Personal gifts	60.5
		Clothing to go out in	60.0
	Value and Lifestyle	Like ads to explain clearly	51.0
		Ads offer company/product info	46.0
		Lifestyle hints from ads	40.5
		Note which country a brand comes from	29.5
		High quality is expensive	16.0
		Fear lagging in information society	16.0
		Leave radio on all the time	15.5
		Wary of products without ads	15.0
	Current Spending	Stocks, etc.	50.5
		Home electronics	39.0
		Health, relaxation	35.5
		Check-ups, preventive medicine	35.0
		Interior decoration	25.5
		Children's education	3.0
	Want to Spend on	Home electronics	42.0
		Check-ups, preventive medicine	41.5
		Interior decoration	36.5
		Children's education	9.5

Kuala Lumpur

Pattern			20s
	Value and Lifestyle	High quality is expensive	40.7
		Visit company Websites	40.7
		Pass on new information	34.8
	Want to Spend on	Socializing	57.8
		Self-improvement	44.4
	Value and Lifestyle	Careful shoppers	57.8
		Lifestyle hints from ads	42.2
		Computers are difficult	25.2
	Current Spending	Dining out	56.3
		Travel	53.3
		Clothing to go out in	51.9
		Beauty	35.6
		Home electronics	31.9
		Fashion	25.9
		Interior decoration	23.7
		Ceremonial occasions	20.0
		Children's education	14.1
		Stocks, etc.	9.6
	Want to Spend on	Travel	71.1
		Clothing to go out in	59.3
		Home electronics	47.4
		Interior decoration	44.4
		Children's education	40.0
		Ceremonial occasions	34.8
		Fashion	34.1

Tokyo

Pattern			20s
	Value and Lifestyle	Can't live without mobile phone	67.2
		Impulse purchases	40.3
	Current Spending	Hobbies	36.2
		Socializing	31.7
		Telecom (mobile phone, Internet)	29.6
		Clothing to go out in	27.1
		Savings	24.8
		Beauty	20.6
		Fashion	20.0
		Ordinary clothing	18.3
		Self-improvement	16.5
	Want to Spend on	Hobbies	53.2
		Clothing to go out in	44.3
		Fashion	37.6
		Beauty	37.6
		Socializing	34.2
		Ordinary clothing	31.4
		Personal gifts	27.5
	Value and Lifestyle	Note which country a product is made in	25.3
	Current Spending	Children's education	5.7

Tokyo data are from Hakuhodo HABIT survey and Seikatsu Teiten survey in Japan

Pattern Explanation

In this part of our study we compared the attitudes of those in their 20s with those in their 30s and 40s. We found two types of patterns, those in which those in their 20s have the highest scores and those in which they have the lowest scores.

Response (20s > 30s, 40s)

Response (20s < 30s, 40s)

Hong Kong: Where Young and Old are All Active Consumers

In Hong Kong, 20-somethings score higher than older cohorts on many items. They are, for example, more likely to make impulse purchases and to pass on information to others. In contrast, seeing high quality as expensive, noting which country a brand comes from and feeling uneasy about the information society are all items on which those in their 20s score lower than those in their 30s and 40s.

Hong Kong 20-somethings are savvy shoppers who score high on information literacy. In terms of current and desired spending, they score much higher than older cohorts on such items as dining out, clothes to go out in, hobbies, personal gifts, and socializing. They are extremely sociable and typically mature consumers in a highly developed economy.

The Summary of Gender and Generation Gaps table (right) is a cross-tabulation of results from our gender-based and age cohort-based analyses. In it we find that Hong Kong is a city where both gender and age-based differences are large. But in Hong Kong, more of those in their 20s look forward to having an age-appropriate appearance instead of remaining forever young. Seniority remains important, and members of all age cohorts still show strong respect for their elders. In Hong Kong those in their 20s, 30s and 40s share a consensus on who their role models should be.

Kuala Lumpur: Where 20-Somethings Want to Spend But Lack Disposable Income

In Kuala Lumpur, those in their 20s are more likely than older cohorts to check company Websites and to pass on information to others. They would like to be able to spend more on self-improvement and socializing. They are more information-aware, spend and would like to spend more on self-improvement and are more sociable than older cohorts. In contrast, those in their 20s score lowest on many such current and desired spending items as dining out, clothes to go out in, fashion, beauty, home electronics and travel. When we add the observation that women in their 20s score higher than men in their 20s on both lifestyle and consumption-related items, we conclude that while 20-somethings in Kula Lumpur want to spend, they still lack the means to follow their desires. Their emergence as active consumers is still in the future.

Tokyo: Where Consumption is More Fragmented Than Anywhere Else in Asia

Tokyo 20-somethings not only score higher than other cohorts on not being able to survive without mobile phones and making impulse purchases; they also score higher on such current and desired spending-related items as ordinary clothing, clothing to go out in, fashion, beauty, hobbies, telecom fees, self-improvement, socialization and personal gifts. The underlying reality is that these are active, affluent and highly sophisticated consumers. Hakuhodo research indicates that they are savvy shoppers who use intelligence and perseverance to get the products they want.

Bangkok: Where Age Differences are Small

In Bangkok, those in their 20s score higher than older cohorts on not being able to survive without mobile phones and quickly trying out new products. They score lower on finding computers difficult and being careful shoppers. Overally those in their 20s are more active consumers than those in their 30s or 40s. Compared, however, to Hong Kong or Tokyo the gaps between those in different cohorts are small.

Shanghai: Smaller Than Expected Differences Between Age Cohorts

Shanghai 20-somethings are more likely than older cohorts to check company Websites, want to be first to acquire new information, make impulse purchases, and spend on telecom fees, hobbies and self-improvement. For many other items, however, their differences with those older than themselves are small. These include such lifestyle-related items as desire to cultivate tastes and

Bangkok

Pattern			20s
	Value and Lifestyle	Can't live without mobile phone	36.4
		Leave radio on all the time	36.4
		Try new products	29.6
	Current Spending	Clothes to go out in	41.3
		Self-improvement	25.7
		Hobbies	18.9
	Want to Spend on	Clothes to go out in	52.4
		Interior decoration	32.5
		Self-improvement	30.6
		Hobbies	25.7
	Value and Lifestyle	Careful shoppers	46.6
		Computers are difficult	28.6
		Lifestyle hints from ads	26.2
	Current Spending	Home electronics	31.6
		Children's education	20.9
	Want to Spend on	Check-ups, preventive medicine	46.6
		Children's education	36.9

Shanghai

Pattern			20s
	Value and Lifestyle	Visit company Websites	38.1
		Impulse purchases	24.8
		Want to be first to know	24.3
	Current Spending	Hobbies	48.0
		Self-improvement	23.3
	Want to Spend on	Telecom (mobile phone, Internet)	69.3
		Hobbies	46.5
		Self-improvement	22.3
	Value and Lifestyle	Brand conscious	19.8
		Uneasy without reading AM paper	6.9
	Current Spending	Savings	44.6
		Stocks, etc.	16.3
		Children's education	12.4
	Want to Spend on	Savings	44.1
		Stocks, etc.	15.8
		Children's education	11.9

Mumbai

Pattern			20s
	Current Spending	Ceremonial occasions	40.2
		Self-improvement	26.5
	Want to Spend on	Clothes to go out in	55.4
		Ceremonial occasions	33.8
		Self-improvement	25.5
	Value and Lifestyle	Lose interest in popular items	31.9
	Current Spending	Children's education	30.4
	Want to Spend on	Children's education	25.5

sensibilities and feeling self-confident when fashionably dressed; such information-related items as passing on new information to others; such consumption-related items as quickly trying out new products; and such spending-related items as wanting to spend more on leisure. These differences are unexpectedly small, given that those born since 1980 did not experience the Cultural Revolution, had opportunities for education, and grew up in a consumer-oriented society. And as "little emperors," born after the launch of the government's one-child policy, they were the target of spending by six adults (two parents and four grandparents). Why then do Global HABIT data show them as relatively similar in attitudes to those in older cohorts?

Hakuhodo is continuing to do research on young Chinese consumers born since 1980. In Shanghai and other major coastal cities, those in their 30s and 40s as well as those in their 20s are accustomed to the consumer society, so the gaps between these cohorts are small. (We expect that, in contrast, the differences between those in their 20s and those in their 30s and 40s who live in inland cities will be relatively large.)

Mumbai: Where the Gender Gap is Wide and the Generation Gap is Small

Of all our cities, the differences between those of different ages are smallest in Mumbai. In Mumbai the proportion of those in their 20s who spend and want to spend more on self-improvement is larger than in older cohorts. In contrast, however, to this greater desire for education and better career prospects, members of the 20-somethings cohort are also more likely than members of older cohorts to spend and want to spend more on ceremonial occasions. Here we see evidence of the continuing strength of traditional values. In comparisons of gender and age differences, the gender gap is larger, with men more likely to consume and be looking for social success, while women are more likely to be conscious of things going on around them. This may reflect the continuing persistence of a strong differentiation of male and female roles. In contrast, the differences between different age cohorts are small. In Mumbai the last several years have seen the local economy in a take-off phase, and rapid economic growth is less well entrenched. Thus, we believe, generations are not yet as different as they are likely to become in the future.

Gender and Generation: Putting It All Together

When we combine our city-by-city comparisons of 20-something men and women with those 20-somethings versus those in their 30s and 40s, several interesting findings emerge.

Summary of Gender and Generation Gaps

	Hong Kong	Kuala Lumpur	Tokyo	Bangkok	Shanghai	Mumbai
20s Gender Gap	Very Large	Moderate	Very Large	Large	Moderate	Large
Active Gender	Male & Female	–	Female	Female	–	Male
Generation Gaps	Very Large	Very Large	Very Large	Moderate	Moderate	Small

Summary and Conclusions

Hong Kong, Bangkok and Mumbai illustrate three key stages in Asian market development. Mumbai is typical of markets where economic development is taking off. The gender gap is wider, with men more active as both consumers and information seekers. Generation gaps are small. Bangkok is typical of developing markets where women become more active in both consumer and public roles, a vital step, we believe, in sustaining economic growth. Hong Kong has reached an advanced stage of economic growth. The interests of men and women may differ, but both are active consumers.

In this study we have identified seven distinct 20-something clusters that appear in cities throughout Asia. Marketing strategies can target one or more. Marketers must, however, keep in mind whether gender and generation gaps are large or small and how these clusters are distributed.