



Global **HABIT**[®]

Hakuhodo Audience and Brand-User's index for Targeting

Report 2014

Global HABIT provides a rich set of data on the world's *sei-katsu-sha*

Global HABIT is a database and single-source survey that Hakuhodo's R&D Division has conducted every year since 2000 in 37 leading cities around the world. With the surveys focusing on the middle and upper classes in each city—i.e., the demographic segments driving market growth—the Global HABIT database is an extremely valuable reference for global marketing.

Global HABIT data is gathered using the same methodology and survey items as the HABIT survey, which Hakuhodo conducts in Japan, and the Seikatsu Teiten survey. Global HABIT data on a wide array of questions, such as lifestyles, values, environmental awareness, media contact, and attitudes to information, as well as ownership of durable goods, attitudes to shopping, and purchasing behaviors can be analyzed by category and brand. The data can also be analyzed across a multitude of factors to suit client needs, because the data sets include images of corporations and “made-in” images. Hakuhodo's original corporate image and brand evaluation scales can be used to measure the strength of brand-*sei-katsu-sha* bonds as well as brand and corporate images. And because data sets from multiple years are available, comparisons of data from the same cities over time can be performed.

As with other Hakuhodo surveys, Global HABIT embodies our *sei-katsu-sha* concept. We don't think of *sei-katsu-sha* as merely consumers; we regard them as living people. Truly effective marketing and branding requires that we probe all consumer behavior, not just behavior associated with consumption, and grasp all aspects of individuals' lives. This *sei-katsu-sha* concept, which Hakuhodo introduced in 1980, is now a widely known approach not just in the marketing world but also throughout the wider Japanese public.

Notes:

The base model for Global HABIT, the HABIT survey is a database containing all the findings of comprehensive, large-sample surveys that Hakuhodo has conducted in Japan each year since 1995.

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

The Seikatsu Teiten survey is a regular observation survey that has been conducted by the Hakuhodo Institute of Life and Living once every two years since 1992.



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What is Global HABIT?

Covers 37 Major Cities



11 cities in Europe and the Americas

- US...New York, Los Angeles, Chicago
- UK...London
- France...Paris
- Germany...Berlin, Frankfurt
- Italy...Milan
- Spain...Madrid
- Russia...Moscow
- Brazil...São Paulo

Two cities in Japan

- Tokyo, Osaka

*The HABIT survey in Japan is conducted separately from the Global HABIT survey.

24 cities in Asia and Oceania

- Hong Kong
- Taiwan...Taipei
- China...Beijing, Shanghai, Guangzhou, Wuhan, Chengdu, Shenyang, Dalian, Fuzhou, Hangzhou, Ningbo, Xi'an
- Malaysia...Kuala Lumpur
- Singapore
- Korea...Seoul
- Thailand...Bangkok
- Philippines...Metro Manila
- Indonesia...Jakarta
- Vietnam...Ho Chi Minh City
- Myanmar...Yangon
- India...Delhi, Mumbai
- Australia...Sydney

Survey Frame

● Survey target: Men and women aged between 15 and 54

Screening is conducted by household income. The survey focuses on the middle and upper classes in each city

● 500–800 samples in each city except Tokyo and Osaka

For Beijing, Shanghai, and Guangzhou, Chinese power *sei-katsu-sha* were added.

For Delhi and Mumbai, Indian power *sei-katsu-sha* were added.

Power *sei-katsu-sha*

Account for approximately 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.

● Survey methods

Asia and China: Face-to-face interviews (interviews in Hong Kong, Taipei and Seoul were held at special meeting venues)

Europe and the Americas: Face-to-face interviews conducted at home or at special meeting venues, questionnaires filled out by subjects at home and mailed in

● When implemented: May–August

● Number of survey items: Approximately 900 items

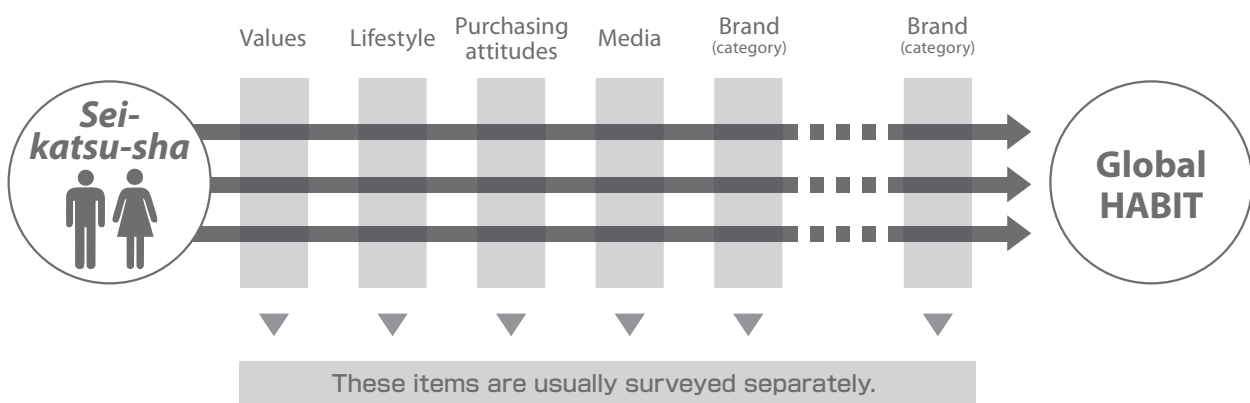
● Data for major cities updated every year

● Evaluate brands using Hakuhodo's original scales

Single-Source Data

In the Global HABIT survey, we question the same respondents (single source) on numerous topics such as lifestyle priorities, value choices, media contact, purchasing attitudes, and their use and awareness of brands in many categories. The results enable us to analyze brand users and brand supporters more precisely in terms of brand consciousness.

● The single-source data advantage



From this single-source data, we can uncover the following types of insight:

- The lifestyles of consumers who intend to purchase your brand or competing brands.
- The profiles of fans of your brand and fans of competing brands, and the media they frequently interact with.

Main Items Surveyed

● Demographics and Lifestyles

Demographics, lifestyle, environmental awareness, media/information contact, purchasing, hobbies, sports, ownership of durable goods, category perceptions, travel, Seikatsu Teiten survey on the lives of the Chinese people (Beijing, Shanghai, Guangzhou)

● Products

Passenger cars, motorcycles, tires, audio/video products, home appliances, computers and printers, mobile phones/smartphones, digital cameras, digital video cameras, copiers and office equipment, game consoles, beer, non-alcoholic beverages, food products (instant food, snacks), cosmetics, personal care products, shampoo, sanitary products, disposable diapers

● Services

Insurance, credit cards, convenience stores, airlines

(Some items surveyed in Asia only)

2013 Survey Data

Shopping Habits

Asian *sei-katsu-sha* tend to carefully compare prices before buying. With I usually make planned purchases and I shop wisely ranking highly in Southeast Asia and India, the trend is toward prudent and wise shopping.

Meanwhile, different tendencies were observed in some other cities.

- In Jakarta, respondents had a tendency to shop prudently but they also Often buy products impulsively.
- In Ho Chi Minh City, I try new products when they are introduced and I often buy products impulsively ranked in the top five, indicating an active attitude toward shopping.
- In Yangon, High quality means high price, I would buy something I like, even if it is high priced, and There are price ranges to fit different social and economic classes ranked in the top five, showing that respondents are price-conscious.
- The top three choices in the three Chinese cities (Shanghai, Beijing, and Guangzhou) exhibited different tendencies from other cities.

(%)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	Carefully compare prices before buying	Usually make planned purchases	Am a wise shopper	Make efforts to go to variety of goods	Brand name products have a goodness of their own	Am conscious about brand names when purchasing goods	Try new products when they are introduced	Am knowledgeable about products	Continue to use the same brand	Helpful assistants in stores are important	High quality means high price	Would buy something I like, even if it is high priced	There are price ranges to fit different social and economic classes	Am conscious of which country a brand comes from	Am conscious of which country a product is made in	Often buy products impulsively
15 Asian cities overall	①51.0	②40.4	③39.3	④39.1	⑤38.0	37.4	36.9	36.6	36.4	33.4	30.5	28.7	28.2	27.5	27.0	25.3
Hong Kong	①67.8	⑤46.3	42.5	36.8	④48.4	34.5	②54.5	27.0	③53.0	43.5	40.3	42.3	34.8	44.1	42.9	33.4
Taipei	①68.6	44.4	28.5	③62.3	②68.0	④61.4	57.0	39.1	56.6	50.6	28.3	39.4	44.6	49.1	⑤58.5	25.6
Seoul	①77.9	54.4	⑤57.5	④58.1	②59.8	③59.5	46.5	48.3	48.9	22.9	25.6	53.8	44.4	47.4	36.9	44.0
Shanghai	26.0	23.3	17.2	③31.5	②35.3	26.8	①39.4	⑤27.9	24.0	20.0	27.8	④28.4	24.4	14.7	14.7	19.3
Beijing	24.8	16.6	20.8	⑤27.0	21.6	③28.0	26.7	25.7	④27.1	23.4	①31.5	26.2	10.1	②28.6	20.1	26.4
Guangzhou	30.3	24.5	20.3	①36.3	③34.4	27.2	⑤32.9	①36.3	22.5	24.3	④33.1	22.8	21.4	16.5	23.2	20.9
Singapore	①49.6	④40.4	②42.4	⑤31.2	30.8	20.2	19.4	26.0	28.4	②42.4	23.0	13.8	21.0	23.4	21.4	12.6
Kuala Lumpur	②47.8	①50.6	④43.9	⑤36.5	27.9	24.9	34.4	27.1	③46.3	33.5	28.8	22.4	35.1	16.9	19.3	24.1
Bangkok	①43.8	②37.0	22.5	③35.6	④33.3	28.4	27.1	⑤33.1	33.0	24.9	25.3	17.0	20.1	19.8	22.3	29.3
Metro Manila	①54.9	②49.4	③48.1	④39.5	34.6	37.0	⑤38.8	23.4	37.4	27.1	33.8	26.3	25.9	23.9	27.0	27.4
Jakarta	①51.5	④29.6	②37.6	23.5	24.1	21.9	19.6	18.3	18.5	16.8	⑤26.5	9.9	25.3	9.5	7.1	③30.5
Ho Chi Minh City	①45.0	25.0	33.5	36.9	26.3	36.8	③42.9	36.1	②44.8	⑤38.3	36.0	31.9	26.3	34.4	31.4	④41.9
Yangon	①41.6	③40.0	14.0	34.8	30.2	27.8	24.0	25.6	21.2	24.0	②40.6	④37.4	④37.4	30.0	29.8	17.2
Delhi	③58.1	④52.7	①70.3	39.3	37.6	⑤49.2	25.5	②65.9	38.2	45.8	18.0	23.7	17.9	24.5	20.1	10.9
Mumbai	③74.1	④72.9	①82.5	53.4	53.2	⑥68.0	54.2	②80.7	38.5	64.2	40.6	32.9	35.2	29.9	29.9	8.4
Moscow	⑤34.0	28.6	①50.2	②49.6	17.8	③41.8	28.4	31.4	33.0	④35.4	33.8	33.0	26.0	21.8	29.2	15.8
(Reference)																
Frankfurt (2012)	③47.7	②50.1	①57.4	39.8	42.6	27.9	40.6	42.4	32.9	④46.5	39.8	⑤45.5	41.6	24.8	25.7	44.6
São Paulo (2012)	①61.0	②52.4	③51.6	25.1	⑤37.5	⑤37.5	22.5	22.3	24.1	④44.0	33.1	11.0	16.9	12.5	7.4	14.9
Tokyo	①67.3	23.6	16.4	34.6	⑤42.2	15.6	8.9	9.3	22.9	②52.9	③47.9	④45.0	17.3	13.9	27.9	29.5

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (22 choices).

Performance vs. Price

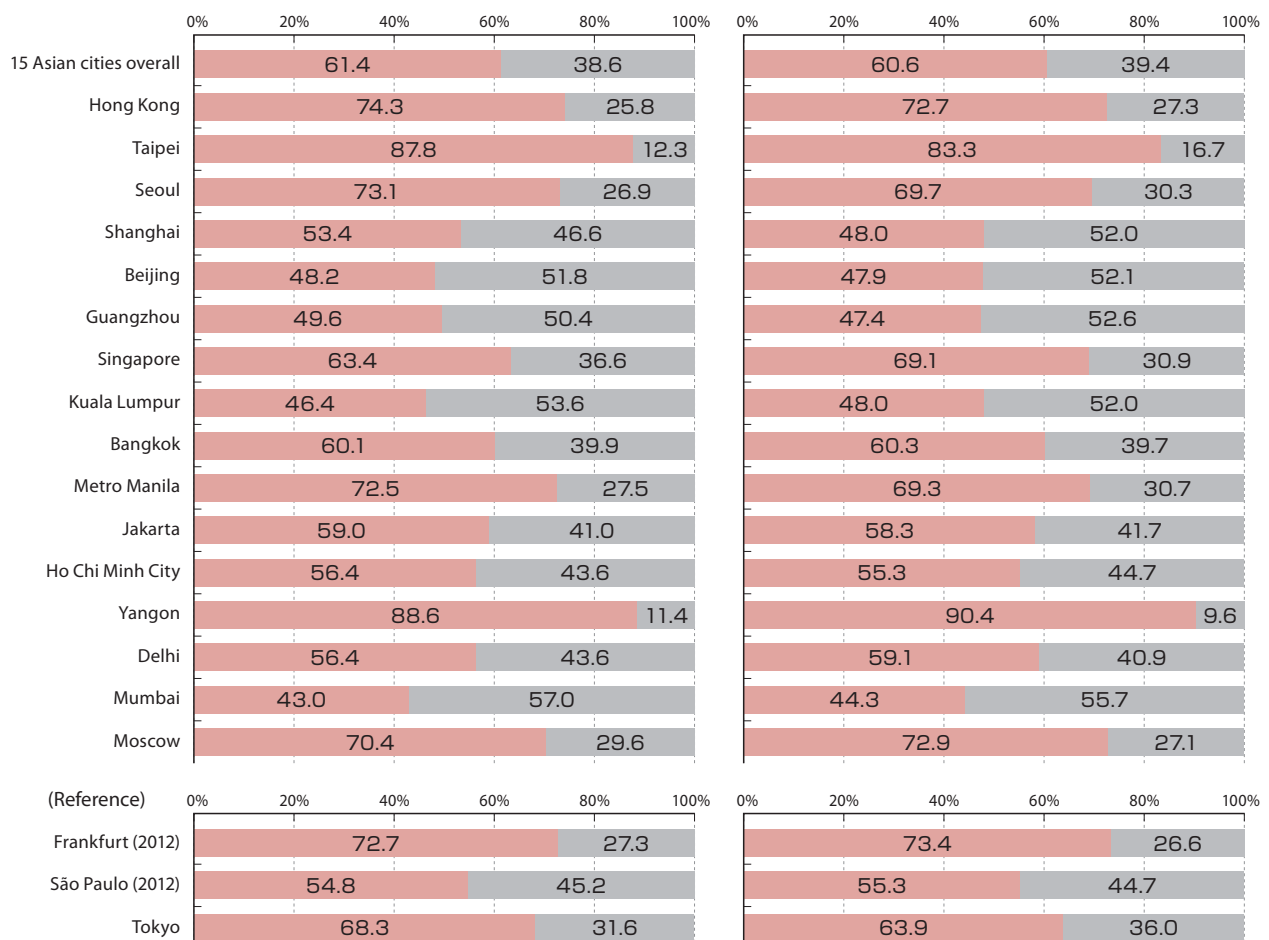
When buying something, respondents in 11 of the 15 Asian cities valued performance over price. We narrowed in on the young adult segment but the tendency was basically the same.

- In Moscow, there was also a tendency to value performance over price.
- Value performance stood out in Taipei and Yangon, where it exceeded 80%.
- In the three Chinese cities, Kuala Lumpur, and Mumbai, opinions were balanced between Value performance and Value price.

Performance vs. Price
(15–54 years old)

Performance vs. Price
(15–29 years old)

Focus more on **performance** than price when buying
Focus more on **price** than performance when buying



Things Currently Spend Money on

While the percentage spent on Daily meals and Communications was high overall, in East Asia Dining out ranked in the top 3, as did Savings in Southeast Asia.

- In Yangon, Home electric appliances ranked in the top 3.
- In 10 of the 15 Asian cities, including the two Indian cities (Delhi, Mumbai), Clothes for going out ranked in the top 5.
- In Moscow, Beauty and Personal gifts ranked in the top 5, each with high percentages of over 60%.

(%)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
	Daily meals	Communications (mobile phone/smart phone, Internet, etc.)	Everyday wear	Dining out	Savings	Clothes for going out	Socializing, including eating and drinking	Personal gifts	Hobbies	Home electric appliances	Travel	Education and learning for my children	Health and relaxation	Beauty (hair-dressing, aesthetic salons, etc.)	Leisure activities other than travel
15 Asian cities overall	①91.6	②76.5	③70.4	④64.8	⑤62.1	61.5	52.5	44.6	44.1	43.4	42.3	40.6	39.5	39.4	38.8
Hong Kong	①99.5	②93.9	③77.4	69.1	⑤70.1	52.5	④74.1	47.0	59.1	50.8	62.4	28.6	40.6	46.5	55.4
Taipei	①96.9	④82.9	③84.0	②90.0	75.3	39.4	76.4	61.4	73.4	54.1	71.5	32.6	52.4	59.0	⑤78.9
Seoul	70.1	①81.3	53.4	②80.5	66.1	③76.8	⑤70.3	61.1	④71.4	49.3	66.9	37.1	47.1	61.1	45.4
Shanghai	②63.8	④49.8	48.9	①64.7	43.6	③51.5	45.5	⑤49.0	37.4	13.1	24.0	28.5	17.2	13.0	45.8
Beijing	②80.7	④73.8	③74.5	①85.2	42.1	⑤68.5	44.5	26.7	38.1	26.2	20.2	32.4	17.6	24.3	34.9
Guangzhou	①88.4	④78.9	②82.9	③81.8	48.3	⑤70.6	61.5	42.2	53.9	27.8	38.9	37.2	31.2	38.2	64.8
Singapore	①92.4	④58.0	50.8	②61.4	③60.2	⑤54.6	50.6	40.2	26.4	27.8	47.4	34.8	22.8	24.8	48.0
Kuala Lumpur	①91.9	③65.6	⑤41.8	④49.3	②70.0	37.3	37.8	23.1	37.8	26.5	29.3	37.6	35.0	17.8	24.9
Bangkok	①97.9	②77.9	③62.6	④61.8	59.9	⑤60.8	46.9	20.5	25.5	38.8	36.8	37.3	31.1	41.0	30.0
Metro Manila	①100	②66.4	④50.8	25.9	③64.3	40.3	11.3	23.1	40.5	⑤49.0	21.8	42.6	31.9	16.9	13.6
Jakarta	①98.4	②74.5	⑤47.9	24.5	③66.9	30.4	22.9	18.8	22.1	37.5	7.6	④50.6	31.3	15.0	20.3
Ho Chi Minh City	①100	③97.3	①100	82.4	76.1	④89.3	⑤87.8	79.0	74.5	58.1	42.8	49.6	66.9	77.1	43.1
Yangon	①98.4	⑤72.2	④75.2	19.8	35.2	③82.4	45.0	45.6	32.0	②85.6	17.6	38.2	26.2	50.6	13.6
Delhi	①100	④74.3	①100	64.3	62.4	③75.0	54.8	56.8	25.1	47.1	64.4	62.4	⑤70.8	42.8	23.8
Mumbai	①100	④93.6	①100	⑤93.0	81.8	③98.4	55.6	72.9	33.3	70.2	75.9	56.9	60.2	62.5	33.2
Moscow	①90.0	③72.4	②82.4	31.8	31.0	38.0	52.2	⑤62.4	32.8	38.8	35.8	35.0	44.4	④63.6	41.0
(Reference)															
Frankfurt (2012)	①93.1	67.7	②81.6	④75.2	60.0	67.1	54.1	65.9	⑤70.1	60.4	⑤70.1	15.4	52.1	48.7	③79.8
São Paulo (2012)	①67.1	②66.7	④56.2	38.4	19.3	③64.5	27.7	⑤41.4	19.5	34.3	11.0	25.3	15.1	34.7	26.1
Tokyo (2012)	①27.3	⑤23.3	8.3	②27.2	15.3	15.4	20.5	12.1	③26.3	12.1	16.2	④25.6	8.9	15.6	14.1

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (23 choices).

Things Will/Will Continue to Spend Money on

There were many items where there were differences in current and future spending.

- In Seoul, Travel was top in future spending. Travel also came into the top 5 in Hong Kong, Taipei and Singapore.
- Moreover, Hobbies and Savings came into the top 5 in Kuala Lumpur and Bangkok, respectively, as did Education and learning for my children in Metro Manila and Jakarta, and Ceremonial occasions in Yangon.
- In the two Indian cities (Delhi, Mumbai), Savings came into the top 5.
- In the three Chinese cities (Shanghai, Beijing, Guangzhou), and Moscow, there was no change to the top 5.

(%)

	Daily meals	Communications (mobile phone/smart phone, Internet, etc.)	Everyday wear	Dining out	Savings	Clothes for going out	Socializing, including eating and drinking	Personal gifts	Hobbies	Home electric appliances	Travel	Education and learning for my children	Health and relaxation	Beauty (hair-dressing, aesthetic salons, etc.)	Leisure activities other than travel	Ceremonial occasions such as weddings, funerals, etc.
15 Asian cities overall	188.8	275.1	370.5	566.9	469.9	64.0	53.3	47.4	46.7	47.3	50.7	49.0	47.7	40.1	43.7	37.2
Hong Kong	100	298.5	482.1	71.6	383.5	61.0	76.9	54.1	65.1	68.8	580.6	47.1	56.4	53.3	61.5	49.4
Taipei	98.6	389.5	484.8	291.1	82.9	53.9	77.8	68.3	77.8	67.4	583.4	56.8	66.1	64.1	80.3	60.9
Seoul	57.6	66.3	49.1	274.8	568.8	469.0	62.9	57.5	372.3	55.8	176.1	41.0	61.4	52.5	57.9	45.1
Shanghai	261.5	448.2	47.2	164.5	43.3	350.0	45.1	547.8	35.5	13.1	25.1	28.9	18.1	13.4	44.5	11.5
Beijing	279.1	372.2	471.4	185.6	44.3	568.7	45.1	29.4	38.1	28.7	29.1	36.0	21.6	24.5	36.1	14.0
Guangzhou	187.7	478.4	283.0	382.4	50.7	571.2	62.2	42.9	54.7	26.8	41.1	37.6	32.9	37.8	65.5	4.3
Singapore	192.0	460.4	54.0	362.4	269.4	55.0	49.8	41.8	29.6	30.0	557.2	40.0	34.6	27.0	48.4	33.2
Kuala Lumpur	193.9	368.5	46.5	456.4	277.8	46.0	45.1	32.5	548.3	35.5	41.1	43.9	43.4	26.5	35.0	32.1
Bangkok	185.4	273.1	563.3	464.4	369.3	63.0	47.3	28.0	29.0	42.3	47.5	43.0	37.5	39.5	41.4	27.9
Metro Manila	100	363.3	52.6	29.4	275.4	44.1	12.5	24.8	38.8	553.8	31.0	455.5	34.6	19.0	18.5	12.8
Jakarta	198.8	277.8	459.6	34.0	371.1	49.6	26.4	22.1	25.4	34.3	11.6	556.9	36.8	17.4	23.1	21.5
Ho Chi Minh City	100	397.6	100	84.9	85.3	490.8	588.8	81.0	78.5	64.6	52.6	55.1	77.0	79.0	46.8	73.0
Yangon	174.4	453.8	551.2	29.4	49.4	358.6	36.2	39.4	27.2	44.6	27.6	38.6	36.4	23.0	19.4	259.0
Delhi	100	72.0	100	62.0	377.3	475.4	55.8	57.4	28.8	53.9	67.0	68.9	572.5	46.1	31.6	55.3
Mumbai	100	494.0	100	593.9	593.9	398.9	60.8	78.7	37.8	83.3	84.2	79.1	78.1	67.3	37.5	66.2
Moscow	188.4	468.8	281.2	49.6	46.2	54.2	58.6	565.8	43.0	52.2	60.2	43.4	60.2	370.4	52.6	34.4
(Reference)																
Frankfurt (2012)	190.1	64.4	280.2	70.3	71.3	64.4	61.4	65.3	575.2	68.3	378.2	32.7	54.5	50.5	477.2	42.6
São Paulo (2012)	359.2	259.4	447.6	543.2	41.0	163.3	27.3	42.4	29.3	41.4	40.8	37.1	30.9	38.2	38.4	29.1
Tokyo (2012)	19.7	12.4	19.1	21.4	158.9	30.7	22.9	19.1	439.7	24.7	245.6	341.2	27.1	27.4	533.6	11.4

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (23 choices).

Image of Japanese Products

The image of Japanese products as Excellent quality was overwhelming.

This was followed by the images Established reputation and Smart/fashionable image.

- The image Excellent quality ranked first in all of the cities except Guangzhou. It ranked second in Guangzhou.
- The image Leading technology ranked first in Guangzhou. It also ranked in the top three in Hong Kong, Shanghai, and Moscow.
- The image Safe/secure ranked in the top three in Hong Kong, Taipei, Ho Chi Minh City, and Yangon.
- In Jakarta and Delhi, Growing image ranked in the top three.

(%)

	1 Excellent quality	2 Established reputation	3 Smart/ fashionable image	4 Leading technology	5 Safe/secure	6 Unique and clear characteristics	7 Pioneering/ innovative image	8 Value-for-money	9 Active/growing image	10 Interesting/ enjoyable	11 Environmentally conscious	12 Energy-conserving	13 Low cost
15 Asian cities overall	①67.4	②49.5	③45.2	④42.4	⑤38.0	36.1	36.0	35.1	34.6	31.3	26.4	25.2	14.0
Hong Kong	①83.0	⑤63.6	④70.8	③70.9	②75.8	44.0	47.4	38.3	44.3	51.3	37.0	36.8	7.8
Taipei	①89.1	②76.0	⑤63.1	58.1	③67.1	53.1	④65.5	38.0	33.4	38.4	38.1	37.1	2.1
Seoul	①64.1	③41.5	②48.0	⑤37.5	29.4	④39.3	19.3	21.8	6.3	24.0	12.4	10.4	0.9
Shanghai	①65.0	②44.3	④42.5	③42.7	38.1	30.8	32.6	20.8	36.4	24.2	⑤39.1	37.2	15.4
Beijing	①45.9	③35.5	②36.6	④30.8	19.3	25.7	23.6	22.7	⑤30.3	24.0	20.8	18.3	17.6
Guangzhou	②44.7	④40.5	③41.0	①45.7	31.9	⑤36.2	28.9	29.8	31.9	31.8	29.6	30.3	15.3
Singapore	①58.6	②55.4	③49.0	④43.6	31.2	36.6	⑤43.2	34.0	32.8	38.0	24.2	20.8	11.2
Kuala Lumpur	①73.5	②46.8	④43.3	36.5	40.9	36.4	③43.6	36.0	⑤42.4	32.4	33.6	30.6	25.8
Bangkok	①58.9	④40.4	②43.6	⑤29.1	15.0	③41.3	25.4	27.4	28.5	28.5	14.5	9.8	13.8
Metro Manila	①55.5	③29.1	②31.0	13.3	17.3	17.0	④22.8	20.8	⑤22.3	18.1	6.3	8.1	13.9
Jakarta	①72.8	②44.9	34.5	④40.8	20.3	35.3	⑤39.6	35.9	③43.4	26.4	27.0	18.9	22.6
Ho Chi Minh City	①83.1	②68.8	38.8	⑤58.3	③61.5	42.4	44.1	④61.1	41.5	40.5	34.4	47.4	23.6
Yangon	①88.4	②82.0	55.6	④64.6	③68.6	34.4	27.0	⑤61.8	37.2	29.2	27.6	22.4	2.6
Delhi	①60.9	36.6	②41.4	37.5	36.8	36.6	⑤38.0	④39.8	③40.8	32.3	28.7	26.7	22.0
Mumbai	①72.3	②52.0	⑤44.8	35.0	25.6	32.2	38.9	③48.9	④47.8	32.8	22.1	20.0	9.5
Moscow	①72.2	②49.6	27.2	③38.2	⑤33.0	31.0	32.0	18.6	18.0	④35.4	25.4	16.8	3.4
(Reference)													
Frankfurt (2012)	①52.5	②41.6	⑤33.7	29.7	26.7	14.9	⑤33.7	④38.6	②41.6	30.7	10.9	11.9	30.7
São Paulo (2012)	①66.7	③41.6	④39.0	②65.5	35.5	18.1	22.3	22.7	30.1	18.9	19.3	⑤36.3	9.0

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (13 choices).

Products and Services Associated with Japan

The top three products, services, and forms of entertainment associated with Japan were Household appliances and audio/visual devices, Digital products, and Automobiles. These were followed by Animation, manga, cartoons, comics, and Food.

- Sightseeing ranked in the top five in Taipei, Seoul, Singapore, and Ho Chi Minh City.
- Fashion products ranked in the top five in Beijing, Kuala Lumpur, and Mumbai.
- In Hong Kong and Taipei, many items exceeded 50%, including Sightseeing, Fashion products, Cosmetics, and Music.

(%)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
	Household appliances and audio/visual devices	Digital products (computers, smartphones, cameras)	Passenger cars	Animation, manga, cartoons, comics	Food	Sightseeing	Fashion products (apparel)	Cosmetics	Luxury brands	Movies	Music	Furniture and interior goods	Sports	Medical care
15 Asian cities overall	①71.8	②63.2	③56.9	④48.8	⑤41.3	38.0	37.5	31.3	29.9	26.0	24.5	23.4	22.6	22.0
Hong Kong	①87.4	②83.0	⑤72.5	④77.8	④77.5	71.3	71.0	66.5	43.0	45.0	55.3	22.1	20.4	18.4
Taipei	①87.6	②82.8	56.1	⑤70.4	④73.0	③78.8	62.5	62.9	20.6	43.4	53.3	20.6	25.3	30.9
Seoul	①72.6	③58.6	30.4	②65.8	⑤36.3	④45.6	23.3	19.5	10.5	20.4	14.3	10.6	8.5	5.5
Shanghai	①84.4	②71.9	③59.7	④54.5	⑤36.6	36.1	24.4	30.0	18.8	17.0	19.2	15.4	16.3	22.0
Beijing	①54.7	②54.3	③50.9	④37.1	23.5	27.3	⑤30.8	12.2	24.9	18.6	18.8	24.1	23.6	10.7
Guangzhou	③50.6	①53.7	④50.1	②51.1	⑤48.3	42.5	37.8	33.3	35.5	23.5	24.9	24.0	25.5	32.8
Singapore	②61.2	①61.6	③58.6	④46.8	39.6	⑤42.8	39.0	29.0	26.0	26.6	28.2	25.0	20.0	21.6
Kuala Lumpur	①77.6	②69.5	③66.6	④43.4	⑤32.0	28.0	⑤32.0	26.5	⑤32.0	17.3	16.3	28.1	19.1	27.4
Bangkok	①66.3	②55.8	④47.6	④36.4	⑤32.6	28.4	27.4	19.5	15.0	18.0	17.9	14.9	14.4	7.8
Metro Manila	①60.0	③36.0	②43.4	④35.3	⑤30.0	20.6	13.1	13.9	15.0	14.5	11.1	11.8	9.3	6.4
Jakarta	①62.9	③55.3	②57.6	④47.3	⑤43.6	21.6	31.5	26.4	26.1	31.8	17.9	23.9	23.9	20.9
Ho Chi Minh City	①88.0	③66.4	②76.4	④53.8	39.4	⑤45.8	40.1	35.9	34.9	32.6	28.1	34.4	29.1	41.3
Yangon	②96.4	③92.2	①97.0	19.8	⑤62.2	41.6	47.8	49.8	53.8	47.2	25.8	④64.0	16.6	34.4
Delhi	①65.2	②55.2	③47.1	29.3	17.2	26.8	31.1	30.5	④37.1	14.9	15.5	22.6	⑤34.6	28.0
Mumbai	①67.1	③62.1	④55.5	51.6	34.7	16.5	⑤55.1	20.3	②63.1	27.6	22.8	25.4	48.9	26.4
Moscow	①80.4	②78.8	③78.4	⑤37.8	④39.0	34.4	5.8	16.0	11.6	11.2	6.0	3.0	6.6	22.0
(Reference)														
Frankfurt (2012)	①71.3	②60.4	③54.5	⑤41.6	④48.5	25.7	17.8	0.0	22.8	16.8	9.9	12.9	17.8	10.9
São Paulo (2012)	②72.1	①74.9	③50.6	④45.0	⑤34.1	30.3	16.1	0.0	31.3	15.5	4.8	9.4	16.9	3.8

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (14 choices).

Japanese Products Would Like to Buy (Made in Japan)

The top three Japanese products manufactured in Japan that respondents selected as products they want to buy were Household appliances and audio/visual devices, Digital products, and Automobiles. These were followed by Fashion products and Cosmetics.

- Skincare products ranked in the top three in Taipei and in the top five in Hong Kong, Singapore, Kuala Lumpur, and Moscow.
- Fresh food ranked in the top three in Hong Kong and in the top five in Shanghai and Guangzhou.
- Furniture and interior goods ranked in the top five in Beijing, Metro Manila, Ho Chi Minh City, and Yangon.

(%)

	1	2	3	4	5	6	7	8	9	10	11	12	13	
	Household appliances, audio/visual devices	Digital products (computers, smartphones, cameras)	Passenger cars	Fashion products (apparel)	Cosmetics	Confectionery, snacks	Skincare products	Fresh food (fruits, vegetables, rice, etc.)	Furniture, interior goods	Processed food	Non-alcoholic beverages	Alcoholic beverages	Disposable diapers	Feminine hygiene products
15 Asian cities overall	①66.6	②64.7	③41.7	④28.9	⑤28.8	24.7	23.4	22.6	21.5	21.5	14.5	13.8	3.5	18.1
Hong Kong	①76.4	②72.6	41.9	50.4	52.6	④68.8	⑤57.8	③68.9	29.3	47.5	39.0	33.5	7.3	49.8
Taipei	①84.0	②80.8	46.0	⑤49.4	④59.9	44.8	③62.6	46.0	24.3	38.4	29.8	33.5	4.5	43.8
Seoul	②39.9	①40.9	③35.4	19.4	④26.0	20.0	14.8	3.6	10.5	15.0	6.9	⑤21.9	2.8	9.0
Shanghai	①79.1	②77.4	③38.8	16.7	④22.2	13.8	8.4	⑤19.7	10.5	16.9	14.1	9.4	1.3	13.2
Beijing	②57.3	①64.9	③44.8	④23.5	14.8	10.2	4.3	14.8	⑤18.2	12.1	9.2	7.4	1.2	3.9
Guangzhou	②75.1	①78.2	③43.6	④41.6	21.9	27.5	15.3	⑤33.7	32.8	29.7	26.2	14.4	1.2	19.9
Singapore	①61.4	②57.2	③48.0	24.6	④31.0	24.8	⑤29.0	20.6	21.2	17.0	12.8	11.2	8.6	21.2
Kuala Lumpur	①70.6	③59.5	②60.1	16.0	④24.6	18.3	⑥20.0	10.0	17.1	10.3	3.1	2.6	0.5	8.8
Bangkok	①62.6	②60.4	③48.0	⑤32.4	④34.9	26.9	31.6	26.6	18.0	31.8	15.3	14.9	4.3	17.5
Metro Manila	②69.6	①70.6	③39.8	④25.8	17.5	12.3	15.3	19.1	⑤20.8	14.1	4.9	11.6	1.5	8.3
Jakarta	①56.1	②53.3	③32.3	④17.0	⑤14.9	8.8	11.1	12.5	13.3	14.0	3.9	3.4	5.4	6.0
Ho Chi Minh City	①72.9	②67.3	34.1	③40.4	35.5	27.8	25.9	34.1	④39.5	⑤37.6	22.1	22.3	5.9	22.3
Yangon	①84.6	③81.0	②83.2	24.2	⑤27.4	21.8	21.8	6.0	④40.4	20.2	18.4	8.8	3.4	27.2
Delhi	①59.8	②52.9	③24.2	⑤18.9	④21.8	14.6	15.5	4.6	16.1	5.5	4.9	1.9	1.7	11.2
Mumbai	②54.4	①56.2	22.9	③30.3	⑤27.4	③30.3	19.8	12.0	18.1	10.0	7.6	8.1	5.6	14.2
Moscow	①56.4	③53.8	②54.6	9.6	④18.4	9.6	⑤17.8	12.4	4.6	15.4	7.4	10.0	7.8	21.2
(Reference)														
Frankfurt (2012)	①65.3	②46.5	③38.6	④21.8	14.9	18.8	11.9	14.9	11.9	⑤19.8	11.9	9.9	1.0	6.0
São Paulo (2012)	①67.3	②58.4	③46.2	10.2	④15.3	3.4	7.8	⑤11.2	6.8	8.2	3.0	7.0	1.4	6.4

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (14 choices).

Japanese Products Would Like to Buy (Made by Japanese companies)

The top three products manufactured by Japanese companies regardless of being manufactured in Japan selected by respondents as products they want to buy were also Household appliances and audio/visual devices, Digital products, and Automobiles.

- Although the overall percentages were down compared to products made in Japan, there were nine cities in which no changes in the items ranked in the top five were exhibited, namely Taipei, the three Chinese cities (Shanghai, Beijing, and Guangzhou), Bangkok, Metro Manila, the Indian two cities (Delhi and Mumbai), and Moscow.
- Fashion products moved up in rank to rank in the top five in Hong Kong, Seoul, Singapore and Yangon.
- On the other hand, Skincare products moved out of the top 5 in Hong Kong, Singapore, and Kuala Lumpur, as did Cosmetics in Singapore and Yangon.

(%)

	Household appliances, audio/visual devices	Digital products (computers, smartphones, cameras)	Passenger cars	Fashion products (apparel)	Cosmetics	Confectionery, snacks	Skincare products	Fresh food (fruits, vegetables, rice, etc.)	Furniture, interior goods	Processed food	Non-alcoholic beverages	Alcoholic beverages	Disposable diapers	Feminine hygiene products
15 Asian cities overall	②55.3	①55.9	③36.5	④27.3	⑤22.3	21.3	18.0	18.1	20.4	18.6	12.5	11.6	3.0	13.4
Hong Kong	①68.4	②64.3	32.8	④47.9	37.9	③52.6	42.0	⑤44.9	29.8	36.8	28.6	25.1	3.9	28.5
Taipei	①68.4	②68.0	32.3	③43.9	⑤34.8	23.1	④36.1	21.5	18.3	19.6	15.4	17.0	2.6	21.5
Seoul	②35.5	①36.3	③27.6	⑤16.6	④16.8	11.6	8.9	3.0	8.5	9.4	4.9	15.0	1.5	5.8
Shanghai	①69.4	②67.0	③36.2	17.5	④20.2	11.9	8.9	⑤18.6	13.9	15.2	11.1	6.6	1.6	13.2
Beijing	②48.3	①63.8	④47.7	④27.2	16.3	18.1	8.1	20.2	⑤24.3	19.5	16.3	14.0	2.5	6.9
Guangzhou	②68.0	①74.6	③58.1	④46.8	17.7	35.0	15.1	⑤40.8	36.7	37.8	33.7	21.9	1.2	21.6
Singapore	①46.6	②42.8	③30.4	④24.4	17.2	⑤20.8	18.4	19.6	15.0	19.4	12.8	15.0	9.8	17.2
Kuala Lumpur	①65.9	③56.9	②58.9	17.3	④22.4	⑤20.9	18.3	9.5	17.4	12.4	3.4	3.0	3.8	12.0
Bangkok	②49.0	①50.3	③38.9	⑤23.5	④26.0	17.4	22.4	16.6	13.9	22.4	10.4	8.9	3.6	13.5
Metro Manila	②55.9	①63.9	③37.4	④22.3	14.8	10.1	13.8	15.6	⑤16.4	13.0	4.3	9.3	1.8	5.5
Jakarta	①46.3	②41.8	③29.0	15.5	⑤17.5	11.9	13.5	8.5	13.3	④17.6	4.5	2.4	4.1	6.5
Ho Chi Minh City	①58.1	②51.1	④33.0	⑤32.1	28.4	31.0	20.8	29.1	③33.1	29.8	20.4	21.9	5.1	14.0
Yangon	①62.8	②61.8	③53.2	⑤28.6	23.2	17.4	17.4	5.4	④43.0	15.6	14.4	7.0	3.0	20.4
Delhi	②40.9	①44.3	③18.4	⑤14.5	④16.9	13.0	10.9	3.5	13.2	3.0	3.4	2.1	0.2	8.2
Mumbai	②44.9	①49.1	17.2	③30.2	④23.4	⑤23.1	16.5	10.0	15.2	7.0	4.7	4.7	2.4	10.0
Moscow	①40.4	②39.8	③36.0	10.4	④12.8	7.6	④12.8	9.0	6.4	10.6	7.2	8.8	4.4	15.6
(Reference)														
Frankfurt (2012)	①58.4	②48.5	③39.6	22.8	18.8	21.8	9.9	④24.8	11.9	⑤23.8	15.8	17.8	4.0	14.0
São Paulo (2012)	①59.8	②55.0	③40.0	10.6	④16.9	6.6	7.2	④16.9	8.6	11.4	2.4	6.8	2.0	10.4

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (14 choices).

Media Habits

Mobile phones/smartphones are must-have items in all cities.

Other tendencies are as follows:

- Word of mouth is an important way of communicating ranked first in the three Chinese cities (Shanghai, Beijing, and Guangzhou). Respondents there tend to Have ways of collecting information and Always pass new information to others.
- In Bangkok, Jakarta, Delhi, Mumbai, and Moscow, Switch channels while watching a TV program ranked in the top three and Keep the TV on without watching it was among the most selected choices.
- In Kuala Lumpur, Ads show a new way of life, I like ads that explain a product's features properly, and Am not confident about products that are not advertised were strong.
- In Ho Chi Minh City and Yangon, there was a tendency toward being Afraid of not keeping up in the information age.

(%)

	1	2	3	4	5	6	7	8	9	10	11	12	13
	My mobile phone/smartphone is essential to my life	Word of mouth is an important way of communicating	Like ads that explain a product's features properly	Ads show a new way of life	Switch channels while watching a TV program	Have my own way of collecting information	Keep the TV on without watching it	I often get information from media websites	Always pass new information to others	Ads an effective means of learning about companies/products	Am afraid of not keeping up in the information age	Try to learn about new product, service before others	Am not confident about products that are not advertised
15 Asian cities overall	①51.3	②46.6	③40.5	④39.6	⑤38.5	37.5	33.8	33.6	29.4	29.2	25.5	25.4	23.9
Hong Kong	②72.3	①73.4	④58.8	36.9	28.9	⑤49.1	45.3	③67.5	36.0	46.1	25.9	31.4	18.1
Taipei	③73.0	②76.6	④64.8	⑤53.8	43.3	42.8	38.8	①81.1	28.5	47.8	30.3	24.6	22.8
Seoul	①78.6	④60.5	③62.5	46.4	47.3	39.3	36.9	②77.5	49.0	45.9	22.9	⑤50.9	19.0
Shanghai	②46.0	①46.9	23.2	④35.9	27.3	31.9	③36.6	14.1	⑤32.3	16.4	20.8	24.1	29.0
Beijing	②40.0	①42.2	28.9	22.3	⑤34.5	③38.2	28.7	14.0	④34.9	8.3	31.2	17.9	23.5
Guangzhou	③35.0	①45.7	27.1	28.4	24.9	②35.2	④30.2	18.5	26.0	20.3	⑤29.2	25.0	24.3
Singapore	①54.8	②42.4	③36.2	31.0	12.0	31.0	14.0	⑤32.0	18.6	④32.2	20.6	11.8	11.2
Kuala Lumpur	②44.5	④34.1	③42.9	①49.0	33.6	25.1	24.5	15.4	30.8	22.0	16.5	20.8	⑤34.0
Bangkok	④38.5	24.3	32.9	⑤33.1	③39.8	②43.3	①45.4	17.5	24.0	22.1	32.4	22.3	28.1
Metro Manila	①55.0	⑤38.4	②49.9	35.8	④40.3	28.4	32.5	③43.1	26.3	37.8	18.8	33.4	23.5
Jakarta	③32.8	25.3	25.1	25.0	①50.0	22.0	②39.5	⑤26.0	10.0	④30.3	21.1	9.9	23.0
Ho Chi Minh City	②52.0	①52.8	⑤38.5	④42.3	31.5	37.9	17.0	26.0	24.0	22.9	③44.4	25.5	24.8
Yangon	②50.2	④31.2	①51.0	⑤28.8	26.8	23.6	24.8	14.6	21.8	22.0	③44.8	13.4	22.8
Delhi	④40.4	37.2	33.1	③48.2	①55.8	②49.7	⑤39.8	20.2	25.3	36.2	12.6	27.8	25.0
Mumbai	④58.2	③61.0	36.2	①70.4	②68.3	⑤57.0	42.0	29.7	47.1	26.6	17.1	33.2	24.1
Moscow	①54.4	25.6	⑤27.2	16.0	②35.6	④29.8	③34.2	11.2	21.0	20.0	10.2	10.2	6.0
(Reference)													
Frankfurt (2012)	④48.5	①55.4	40.8	25.7	38.6	②54.3	32.7	42.4	③52.9	⑤43.8	13.9	21.6	5.9
São Paulo (2012)	⑤41.6	①60.8	32.9	37.6	②54.4	23.9	③49.6	18.5	21.9	④46.8	16.9	8.8	23.7
Tokyo	①57.4	②53.8	⑤32.9	15.8	28.8	18.7	③47.1	32.3	9.1	④45.0	10.5	12.5	10.3

Shading indicates items ranked top 5 in that city. Circled numerals indicate rank (1st to 5th). Multiple answers were permitted (18 choices).

Mobile Phones/Smartphones

The ownership of smartphones exceeded 50% in 10 of the 15 Asian cities, particularly those in East Asia. There were also cities in which mobile phones were in the mainstream.

- In Hong Kong, Taipei, Seoul, Singapore, and Yangon, smartphone ownership in all of the age segments from 15–54 exceeded 50%. Most notably, ownership in all age segments in Seoul was 80% or more.
- In Kuala Lumpur and Bangkok, smartphone and mobile phone ownership were neck and neck at around 50% each.
- In Metro Manila, Jakarta, Ho Chi Minh City, Delhi, Mumbai, and Moscow, mobile phone ownership in all age segments was 50% or more.

	Smartphone ownership (Private)							Mobile phone ownership (Private)						
	Total		15–19 y/o	20–29 y/o	30–39 y/o	40–49 y/o	50–54 y/o	Total		15–19 y/o	20–29 y/o	30–39 y/o	40–49 y/o	50–54 y/o
	%	N	%	%	%	%	%	%	N	%	%	%	%	%
15 Asian cities overall	59.5	6,807	64.8	74.2	65.7	48.3	34.4	50.4	5,774	41.7	40.6	47.2	59.3	68.0
Hong Kong	91.8	734	96.0	99.0	97.0	88.0	70.0	29.1	233	22.0	21.5	24.5	33.5	52.0
Taipei	85.9	687	85.0	93.5	93.0	83.0	63.0	41.9	335	35.0	36.5	32.5	49.5	63.0
Seoul	95.3	762	95.0	98.5	96.5	95.0	87.0	5.9	47	7.0	1.5	4.0	6.5	16.0
Shanghai	61.0	499	67.0	82.6	73.0	45.7	19.0	46.7	382	35.9	28.4	40.2	60.0	80.0
Beijing	76.4	620	87.1	93.6	88.8	61.7	35.3	29.8	242	15.8	16.3	17.0	45.3	65.7
Guangzhou	75.7	615	82.4	98.5	89.7	60.3	26.7	38.4	312	25.5	21.3	31.5	50.0	76.2
Singapore	83.0	415	88.3	89.8	89.1	78.2	60.0	18.4	92	15.0	10.9	13.3	24.2	36.7
Kuala Lumpur	53.5	428	53.0	75.0	67.5	33.0	24.0	53.9	431	47.0	37.5	42.5	73.5	77.0
Bangkok	46.3	370	64.0	65.0	50.0	28.0	20.0	62.5	500	45.0	44.5	59.5	83.5	80.0
Metro Manila	56.9	455	54.0	70.5	65.0	46.5	37.0	78.1	625	75.0	77.5	81.5	77.5	77.0
Jakarta	27.1	217	42.0	39.5	33.5	8.5	12.0	83.9	671	79.0	82.0	85.0	86.5	85.0
Ho Chi Minh City	33.3	266	33.0	54.5	35.5	20.0	13.0	71.9	575	61.0	59.5	72.0	83.0	85.0
Yangon	73.4	367	71.7	90.6	71.9	69.4	50.0	16.8	84	6.7	5.5	22.7	19.4	33.3
Delhi	20.0	160	29.0	32.3	18.0	11.5	7.0	84.0	673	71.0	77.6	87.5	89.5	92.0
Mumbai	26.4	212	36.0	42.0	26.5	14.9	8.9	71.3	572	60.0	65.0	74.0	78.6	75.2
Moscow	40.4	202	53.3	56.3	41.4	27.4	18.3	77.6	388	63.3	65.6	77.3	89.5	93.3
(Reference)														
Tokyo	58.9	1,440	66.3	79.2	66.6	44.9	35.7	57.4	1,404	53.9	45.3	51.1	67.5	69.9

Ownership 70% or more Ownership between 50% and 69%

*Multiple answers were permitted. Totals exceed 100% as respondents who own both products answered both questions.



HAKUHODO