

## Attitudes to Travel to Japan among *Sei-katsu-sha* in 14 Asian Cities

- Experience and intention of visiting Japan both high in Taipei and Hong Kong  
Growth in tourist numbers can be expected in Singapore, Metro Manila, Bangkok and Guangzhou
- Tokyo area far and away the area respondents would like to visit, but among those in Taipei and Hong Kong, Hokkaido is tops
- In Japan's tourist draw cards, aside from cultural and historical buildings, nature, food, and hot springs; seeing modern cities and shopping also rate highly. Over 70% intend buying at least one product.

To support marketing communication in the global market place, Hakuhodo has conducted its Global HABIT survey of *sei-katsu-sha* each year since 2000. Conducted in 35 major cities in Asia, Europe, the United States and South America, the survey polls middle- and high-income earners. We have analyzed data from the most recent Global HABIT survey (conducted in 2014) from a variety of perspectives to discover hints about potential opportunities in the global marketplace. For previous reports, please visit Hakuhodo's website.

With a view to assisting the Japanese tourism industry, including the Visit Japan campaign, for this report we analyze *sei-katsu-sha* in 14 Asian cities who intent to travel to Japan. We also introduce data from the US (New York) and Brazil (Sao Paulo) for reference.

### 1. Taipei and Hong Kong high in both experience and intention of visiting Japan. In Singapore, Metro Manila, Guangzhou and Bangkok, intention of visiting is higher than experience.

- Experience and intention of visiting Japan are both high in Taipei (experience: 61.5%; intention: 65.9%) and Hong Kong (58.3%; 61.1%), hinting at a sizable group of repeat visitors.
- Intention of visiting is higher than experience in Singapore (experience: 18.7%; intention: 39.5%), Metro Manila (3.3%; 38.3%), Guangzhou (2.7%; 29.4%) and Bangkok (0.9%; 24.0%). Growth in tourist numbers from these cities can be expected.

### 2. In Taipei and Hong Kong, Hokkaido is the No. 1 area respondents would like to visit. In other cities, Tokyo is far and away the No. 1.

- In Taipei and Hong Kong, where there are large numbers of repeat visitors, the No. 1 area respondents would like to visit is Hokkaido. This suggests a desire to see snow and vast wilderness areas, which cannot be easily enjoyed in those countries.
- Conversely, the Tokyo area is No.1 in the other 12 cities. The 14-city average score for the Tokyo area is also a very high 74.2%.

### 3. In focus of travel to Japan, Sightseeing cultural and historical buildings, Enjoying specialty foods and Seeing splendid natural scenery make up the top 3, while Seeing modern cities and Shopping also rate highly.

- The top 3 activities to do during a visit to Japan are Sightseeing cultural and historical buildings (72.6%), Enjoying specialty foods (71.8%) and Seeing splendid natural scenery (70.6%). These are followed by Relaxing at a hot spring resort (65.1%), rounding out the Japanese tourism hit parade. The desire to enjoy present-day Japan is also strong, as seen in Seeing modern cities (49.1%) and Visiting an amusement park (49.0%).
- Many respondents also name Shopping as an activity they would like to undertake during a visit to Japan. By product category, shopping for Clothes/fashion accessories (48.8%), Home appliances (41.5%) and Cosmetics, skincare & supplements (37.8%) making up the top 3.

### 4. Hints for measures to draw foreign tourists to Japan

(1) Those that intend to visit Japan are bigger fans of Japanese products than those that do not  
The difference between the two in terms of image of Japanese products is highest for Safe/secure (17.8 points). Since the ability to buy authentic (not counterfeit) products made in Japan is one incentive driving intention to visit Japan, the potential for shopping tourism is likely to be extremely high.

(2) Providing communication and tourism resources (experiential value) tailored to targets (those that intend to visit Japan) is vital

It is crucial to pin-point the motivations of targets who intend to visit Japan and to provide tourism resources tailored to their needs, sending out appropriate communication and information in line with their motivations.

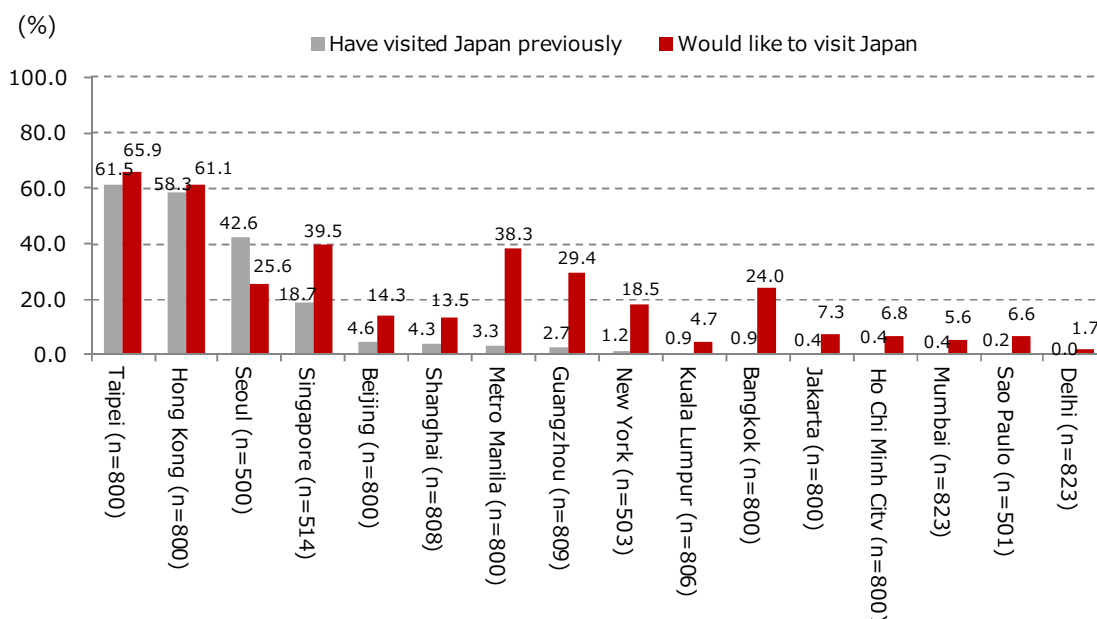
# 1. Taipei and Hong Kong high in both experience and intention of visiting Japan.

## In Singapore, Metro Manila, Guangzhou and Bangkok, intention of visiting is higher than experience.

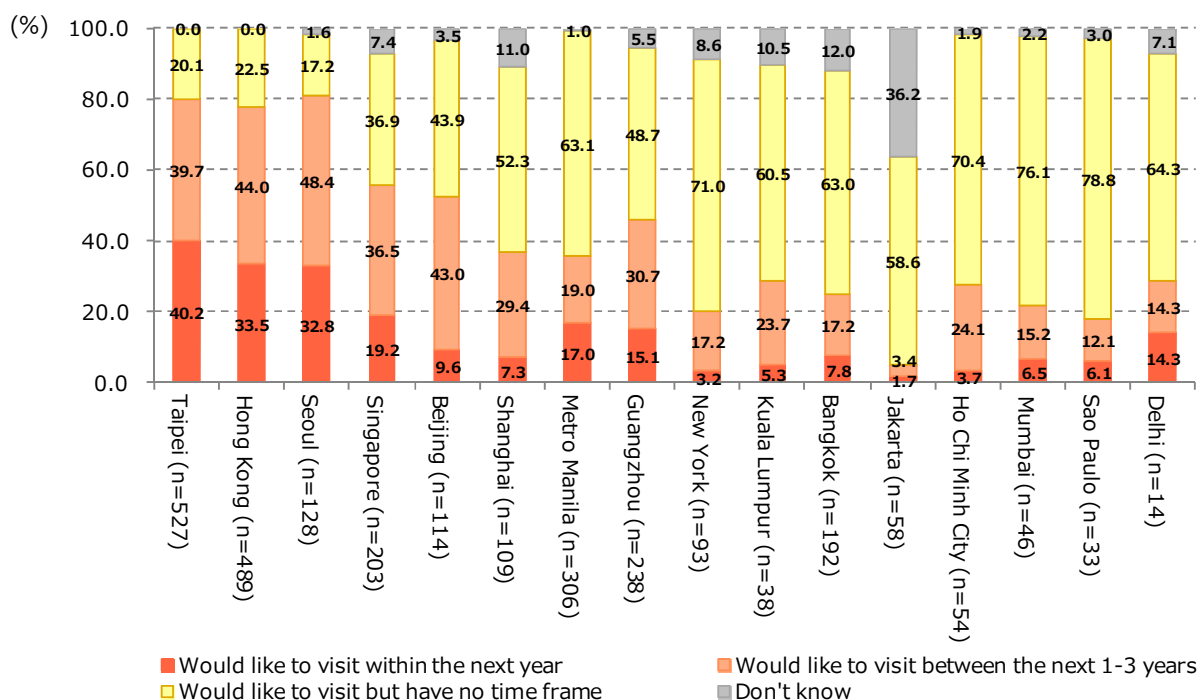
- Previous experience visiting Japan and intention of visiting Japan in the future were both high in Taipei (experience: 61.5%; intention: 65.9%) and Hong Kong (58.3%; 61.1%).
- Intention of visiting Japan was higher than experience in Singapore (experience: 18.7%; intention: 39.5%), Metro Manila (3.3%; 38.3%), Guangzhou (2.7%; 29.4%) and Bangkok (0.9%; 24.0%). For reference, the figures for New York were 1.2% and 18.5%.
- With experience and intention of visiting both high, it appears there are many repeat visitors in Taipei and Hong Kong. Growth in visitor numbers can be expected from Singapore, Metro Manila, Guangzhou, Bangkok and New York, where the difference between intention to visit and experience was high.
- In Seoul, intention (25.6%) was lower than experience (42.6%).
- When we asked those that intend to visit Japan when they would like to visit, the scores for Within the next year were over 30% in Taipei (40.2%), Hong Kong (33.5%) and Seoul (32.8%). Compared with other cities, these cities have more people that are likely to actualize their intention of visiting.
- Although intention of visiting was lower than experience in Seoul, when we asked those who would like to visit when they would like to do so, the proportion that responded Within the next year was in the top 3 among the 14 Asian cities. Innovating the way Japan is promoted in Korea, including sending messages about new charms of the country, could hold great potential not only for developing repeat visitors but also new segments that intend to visit Japan.

Q. Have you ever visited Japan for travel or other reasons before? (Including business trips and family visits)

Q. Would you like to visit Japan in the future, regardless of whether you have visited previously or not? (Including business trips and family visits)



Q. When would you like to visit Japan? Base: Those who would like to visit/visit again



## 2. In Taipei and Hong Kong, Hokkaido is the No. 1 area respondents would like to visit. In other cities, Tokyo is far and away the No. 1.

- We asked those who intend to visit/visit again which of Japan's 6 key tourist areas they wanted to visit. Hokkaido came out top in Taipei (75.9%) and Hong Kong (83.2%), cities where there are large numbers of repeat visitors. A desire to see snow and vast wilderness areas, which cannot easily be enjoyed in those countries, is likely to be one reason for this result.
- Conversely, the Tokyo area was No.1 in the other 12 Asian cities, gaining a very high 14-city average score of 74.2%.

Q. What area or areas of Japan would you like to visit? (6 options; multiple responses permitted) Base: Those who would like to visit/visit again

(%)	1st	2nd	3rd	4th	5th	6th
14-city average (n=2,516)	Tokyo area (74.2)	Hokkaido area (59.5)	Osaka area (50.3)	Kyoto area (38.1)	Okinawa area (37.9)	Fukuoka area (22.3)
Taipei (n=527)	Hokkaido area (75.9)	Tokyo area (70.0)	Kyoto area (56.9)	Osaka area (55.2)	Okinawa area (46.5)	Fukuoka area (26.4)
Hong Kong (n=489)	Hokkaido area (83.2)	Tokyo area (68.3)	Osaka area (65.8)	Okinawa area (64.8)	Kyoto area (40.3)	Fukuoka area (26.8)
Seoul (n=128)	Tokyo area (75.0)	Osaka area (38.3)	Hokkaido area (28.1)	Okinawa area (28.1)	Kyoto area (21.1)	Fukuoka area (15.6)
Shanghai (n=109)	Tokyo area (75.2)	Hokkaido area (72.5)	Osaka area (55.0)	Kyoto area (43.1)	Fukuoka area (26.6)	Okinawa area (23.9)
Beijing (n=114)	Tokyo area (80.7)	Hokkaido area (79.8)	Osaka area (64.9)	Kyoto area (56.1)	Okinawa area (43.0)	Fukuoka area (33.3)
Guangzhou (n=238)	Tokyo area (74.4)	Hokkaido area (60.9)	Osaka area (57.6)	Kyoto area (48.7)	Okinawa area (37.8)	Fukuoka area (32.8)
Singapore (n=203)	Tokyo area (71.9)	Hokkaido area (67.0)	Osaka area (49.3)	Kyoto area (41.4)	Okinawa area (26.6)	Fukuoka area (23.6)
Kuala Lumpur (n=38)	Tokyo area (73.7)	Hokkaido area (50.0)	Osaka area (28.9)	Kyoto area (13.2)	Okinawa area (13.2)	Fukuoka area (0.0)
Bangkok (n=192)	Tokyo area (69.3)	Hokkaido area (51.6)	Osaka area (28.6)	Kyoto area (20.3)	Fukuoka area (12.5)	Okinawa area (11.5)
Metro Manila (n=306)	Tokyo area (87.6)	Osaka area (31.4)	Okinawa area (22.9)	Hokkaido area (12.1)	Kyoto area (8.8)	Fukuoka area (8.5)
Jakarta (n=58)	Tokyo area (86.2)	Osaka area (51.7)	Hokkaido area (25.9)	Okinawa area (20.7)	Kyoto area (15.5)	Fukuoka area (6.9)
Ho Chi Minh City (n=54)	Tokyo area (90.7)	Osaka area (44.4)	Kyoto area (31.5)	Hokkaido area (27.8)	Okinawa area (27.8)	Fukuoka area (11.1)
Delhi (n=14)	Tokyo area (92.9)	Kyoto area (14.3)	Osaka area (7.1)	Hokkaido area (0.0)	Fukuoka area (0.0)	Okinawa area (0.0)
Mumbai (n=46)	Tokyo area (67.4)	Kyoto area (54.3)	Hokkaido area (41.3)	Fukuoka area (41.3)	Osaka area (32.6)	Okinawa area (26.1)
New York (n=93)	Tokyo area (72.0)	Okinawa area (23.7)	Kyoto area (22.6)	Osaka area (21.5)	Fukuoka area (8.6)	Hokkaido area (5.4)
Sao Paulo (n=33)	Tokyo area (87.9)	Osaka area (30.3)	Okinawa area (12.1)	Kyoto area (9.1)	Hokkaido area (3.0)	Fukuoka area (3.0)

### Reference: Information sources

- The most cited source of information on visiting Japan is Travel guidebooks (14-city average: 70.6%), but depending on the city, Family members, friends and acquaintances, Travel agents, and other word of mouth information is also important. There are still many sources of information that are not being fully utilized. For instance, using tourist facility, accommodation and travel company websites to put out a variety of information in a multi-faceted way could make spreading the word about the attractions of each area possible.

Q. Which information sources did you use/do you think you will use to gather information for your trip to Japan? (16 options; multiple responses permitted) Base: Those who would like to visit/visit again

(%)	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th
	Travel guidebooks	Family members, friends & acquaintances	Travel magazines	Travel programs, information programs	Travel company brochures	Blogs and travel review sites	Tourist facility websites	Accommodation websites	Travel company websites	Specialized travel websites	Search sites	Central and local government websites	Travel agents	Movies and TV dramas	Travel promotion events	Free newspapers & magazines
14-city average (n=2,516)	70.6	53.3	47.5	44.3	41.6	40.5	40.3	40.0	35.5	35.3	35.3	30.9	29.8	25.2	21.3	14.5
Taipei (n=527)	78.9	69.8	74.6	71.7	57.7	64.7	39.1	48.6	43.6	57.1	43.1	34.5	25.2	37.8	48.8	17.1
Hong Kong (n=489)	95.5	84.9	74.0	65.8	54.6	56.4	72.0	78.9	46.0	53.2	50.1	56.0	35.2	25.4	21.3	29.2
Seoul (n=128)	68.8	54.7	24.2	31.3	14.8	67.2	31.3	36.7	42.2	33.6	27.3	10.9	22.7	14.8	6.3	0.8
Shanghai (n=109)	49.5	34.9	27.5	33.0	22.0	41.3	17.4	18.3	28.4	37.6	22.9	32.1	18.3	21.1	5.5	5.5
Beijing (n=114)	38.6	44.7	18.4	24.6	29.8	37.7	14.0	17.5	16.7	34.2	29.8	26.3	33.3	20.2	2.6	16.7
Guangzhou (n=238)	55.5	28.6	38.7	21.4	41.6	22.7	29.0	16.4	29.0	26.1	28.6	21.8	41.2	23.9	12.2	9.2
Singapore (n=203)	60.1	44.8	44.8	36.9	33.5	38.4	37.9	33.5	32.0	26.1	32.0	35.0	31.0	23.2	29.1	10.8
Kuala Lumpur (n=38)	71.1	31.6	26.3	18.4	50.0	21.1	23.7	15.8	21.1	13.2	23.7	7.9	15.8	21.1	23.7	7.9
Bangkok (n=192)	56.3	37.0	29.7	32.8	38.5	14.1	43.8	18.8	34.4	16.7	21.4	17.2	17.2	27.1	10.9	7.8
Metro Manila (n=306)	70.6	33.0	22.5	24.2	30.4	10.8	31.4	31.4	22.9	10.8	24.5	18.3	25.8	12.7	10.1	7.2
Jakarta (n=58)	63.8	22.4	22.4	22.4	43.1	12.1	24.1	13.8	17.2	17.2	12.1	20.7	37.9	37.9	3.4	12.1
Ho Chi Minh City (n=54)	64.8	53.7	24.1	27.8	27.8	25.9	33.3	29.6	24.1	13.0	50.0	24.1	38.9	24.1	1.9	13.0
Delhi (n=14)	42.9	28.6	21.4	14.3	7.1	0.0	42.9	0.0	35.7	0.0	35.7	7.1	35.7	14.3	7.1	7.1
Mumbai (n=46)	54.3	23.9	23.9	23.9	10.9	13.0	15.2	17.4	63.0	6.5	54.3	4.3	69.6	10.9	10.9	13.0
New York (n=93)	66.7	46.2	36.6	29.0	32.3	30.1	52.7	38.7	39.8	30.1	32.3	43.0	35.5	14.0	14.0	8.6
Sao Paulo (n=33)	27.3	33.3	24.2	15.2	0.0	3.0	36.4	3.0	15.2	12.1	15.2	3.0	9.1	27.3	9.1	18.2

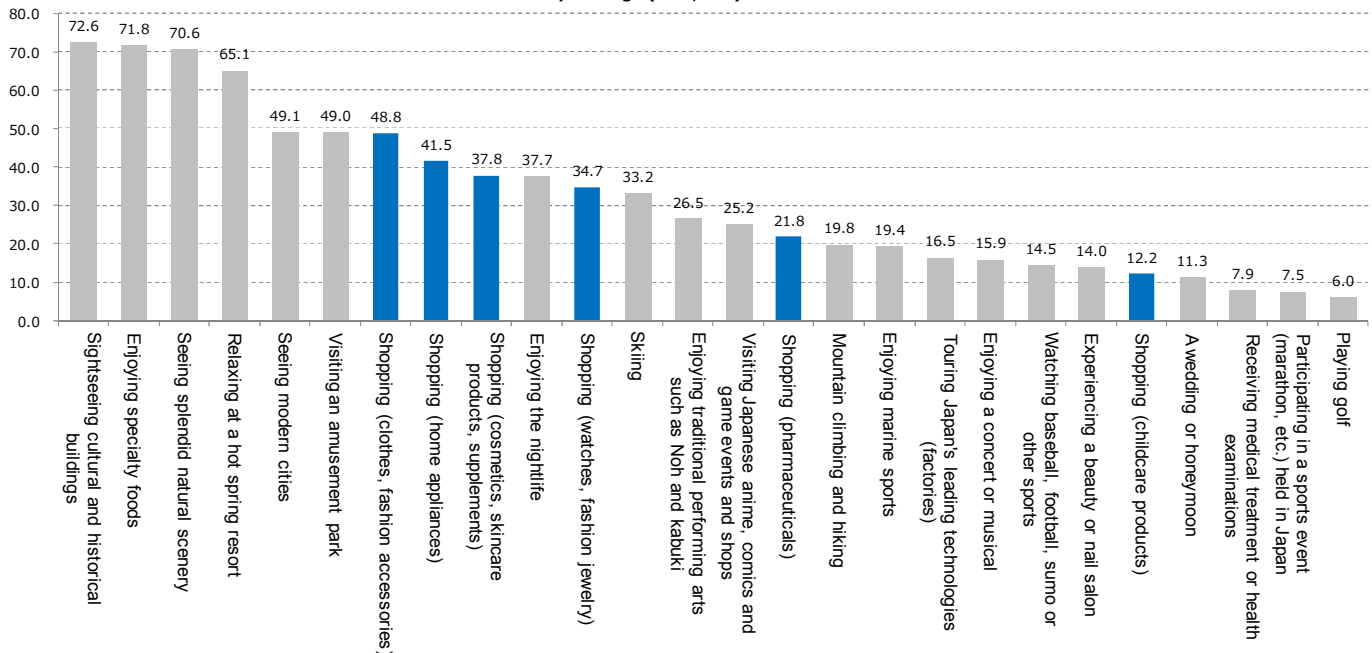
Shading indicates the top 5 responses in each city

### 3. In focus of travel to Japan, Sightseeing cultural and historical buildings, Enjoying specialty foods, and Seeing splendid natural scenery make up the top 3, while Seeing modern cities and Shopping also rate highly.

- When we asked those intend to visit/visit again what they did or plan to do in Japan, the top 3 responses were Sightseeing cultural and historical buildings (72.6%), Enjoying specialty food (71.8%) and Seeing splendid natural scenery (70.6%), indicating a strong trend toward enjoying Japan's history, culture, food and nature. Relaxing at a hot spring resort, another particular pleasure of Japan, followed at No. 4 (65.1%).
- A desire to enjoy present-day Japan was also visible, as seen in Seeing modern cities (49.1%) and Visiting an amusement park (49.0%).
- Many respondents also named shopping as a focus of their visit to Japan. By product category, the rankings were: Clothes/fashion accessories (48.8%), Home appliances (41.5%), Cosmetics, skincare & supplements (37.8%), Watches and fashion jewelry (34.7%), Pharmaceuticals (21.8%) and Childcare products (12.2%). Over 70% of respondents overall selected one or more shopping category, so it is probably fair to say that shopping is a big draw card for visitors coming to Japan.

Q. What did you do/do you think you will do during your visit to Japan? (26 options; multiple responses permitted) Base: Those who would like to visit/visit again

14-city average (n=2,516)



	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th	17th	18th	19th	20th	21st	22nd	23rd	24th	25th	26th
(%)	Sightseeing cultural and historical buildings	Enjoying specialty foods	Seeing splendid natural scenery	Relaxing at a hot spring resort	Seeing modern cities	Visiting an amusement park	Shopping (clothes, fashion accessories)	Shopping (home appliances)	Shopping (cosmetics, skincare products, supplements)	Enjoying the nightlife	Shopping (watches, fashion jewelry)	Skiing	Enjoying traditional performing arts such as Noh and kabuki	Visiting Japanese anime, comics and game events and shops	Shopping (pharmaceuticals)	Mountain climbing and hiking	Enjoying marine sports	Touring Japan's leading technologies (factories)	Enjoying a concert or musical	Watching baseball, football, sumo or other sports	Experiencing a beauty or nail salon	Shopping (childcare products)	A wedding or honeymoon	Receiving medical treatment or health examinations	Participating in a sports event (marathon, etc.) held in Japan	Playing golf
14-city average (n=2,516)	72.6	71.8	70.6	65.1	49.1	49.0	48.8	41.5	37.8	37.7	34.7	33.2	26.5	25.2	21.8	19.8	19.4	16.5	15.9	14.5	14.0	12.2	11.3	7.9	7.5	6.0
Taipei (n=527)	81.8	87.5	76.9	77.4	46.5	58.6	59.8	42.1	50.3	41.9	33.8	39.7	35.7	18.6	46.7	12.1	18.0	13.9	13.3	10.6	11.4	10.2	15.6	3.4	6.1	1.9
Hong Kong (n=489)	78.1	94.1	90.2	87.7	56.6	68.7	71.6	59.9	57.9	45.6	44.8	55.0	27.0	34.8	40.5	14.7	34.8	12.5	14.5	13.1	10.6	29.7	16.8	4.5	5.9	3.3
Seoul (n=128)	68.8	86.7	64.1	73.4	53.1	35.2	46.1	24.2	27.3	28.9	32.8	10.9	20.3	16.4	5.5	4.7	10.9	1.6	13.3	11.7	7.8	2.3	3.1	0.0	4.7	3.9
Shanghai (n=109)	61.5	53.2	48.6	61.5	38.5	37.6	22.9	43.1	19.3	37.6	24.8	34.9	20.2	22.9	2.8	43.1	15.6	8.3	6.4	10.1	3.7	0.0	0.9	3.7	0.9	11.0
Beijing (n=114)	54.4	45.6	42.1	50.9	35.1	22.8	21.9	36.0	17.5	20.2	24.6	19.3	30.7	22.8	2.6	21.1	14.9	9.6	19.3	26.3	21.1	2.6	7.9	11.4	12.3	9.6
Guangzhou (n=238)	60.9	55.5	57.6	55.5	53.4	35.7	29.8	23.1	23.9	37.4	24.4	22.3	22.3	22.7	5.0	31.9	17.2	23.1	22.3	24.8	24.4	1.7	8.4	18.1	14.7	18.1
Singapore (n=203)	89.7	77.3	66.0	71.4	44.8	40.4	55.2	38.4	42.4	41.4	41.9	35.5	29.6	25.6	21.2	23.2	17.2	22.2	21.2	15.3	17.7	15.3	17.2	6.4	9.4	6.4
Kuala Lumpur (n=38)	73.7	50.0	57.9	50.0	52.6	36.8	36.8	13.2	15.8	34.2	26.3	31.6	28.9	26.3	5.3	10.5	7.9	13.2	13.2	10.5	5.3	2.6	7.9	0.0	5.3	2.6
Bangkok (n=192)	80.7	43.8	56.8	37.5	39.6	26.6	18.8	14.1	18.2	17.2	14.6	17.7	13.5	12.5	1.0	14.1	9.4	15.1	14.1	7.3	9.4	1.0	1.6	6.3	6.3	7.3
Metro Manila (n=306)	65.0	67.0	74.2	48.7	48.7	59.5	52.0	55.2	33.7	40.8	47.1	21.2	23.2	34.0	5.9	24.8	8.8	30.7	21.2	19.0	22.2	14.7	9.5	18.6	6.5	3.3
Jakarta (n=58)	63.8	36.2	70.7	27.6	56.9	32.8	27.6	29.3	15.5	20.7	22.4	13.8	19.0	25.9	12.1	12.1	19.0	27.6	8.6	12.1	12.1	6.9	6.9	12.1	12.1	3.4
Ho Chi Minh City (n=54)	70.4	57.4	66.7	46.3	63.0	51.9	27.8	50.0	24.1	53.7	25.9	31.5	22.2	37.0	9.3	40.7	13.0	18.5	20.4	14.8	16.7	13.0	11.1	14.8	11.1	7.4
Delhi (n=14)	21.4	35.7	71.4	7.1	64.3	21.4	28.6	28.6	28.6	57.1	28.6	14.3	21.4	14.3	0.0	7.1	42.9	21.4	7.1	14.3	7.1	7.1	14.3	7.1	0.0	7.1
Mumbai (n=46)	19.6	23.9	69.6	50.0	52.2	26.1	58.7	60.9	32.6	21.7	50.0	43.5	34.8	26.1	6.5	56.5	58.7	6.5	8.7	13.0	6.5	13.0	10.9	4.3	10.9	17.4
New York (n=93)	91.4	64.5	55.9	50.5	60.2	40.9	36.6	30.1	21.5	49.5	32.3	5.4	35.5	26.9	9.7	20.4	16.1	25.8	23.7	23.7	16.1	5.4	6.5	4.3	9.7	3.2
Sao Paulo (n=33)	69.7	18.2	21.2	24.2	69.7	18.2	9.1	30.3	9.1	45.5	21.2	6.1	3.0	15.2	0.0	6.1	6.1	12.1	6.1	6.1	6.1	0.0	0.0	0.0	6.1	3.0

Shading indicates the top 3 responses in each city

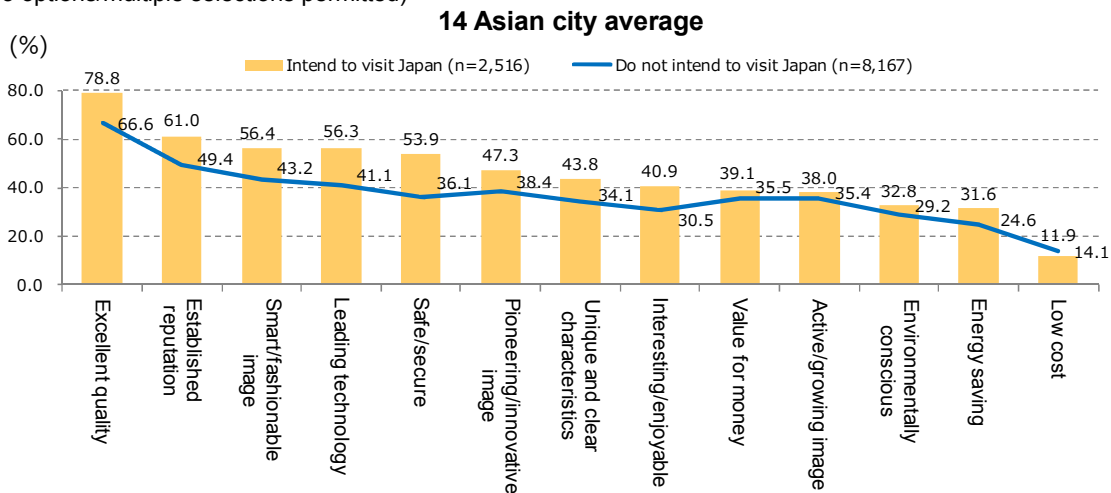
**Hint 1: Image of Japanese products: Those that intend to visit Japan vs. those that do not**  
**Those who intend visiting Japan have a more positive image of Japanese products, and stronger desire to buy products made in Japan than those who do not intend visiting Japan.**

On the previous page, we saw that many respondents mentioned shopping as an activity they would like to do in Japan. Let us now look to see differences in image of Japanese products between those who intend visiting Japan and those that do not\*.

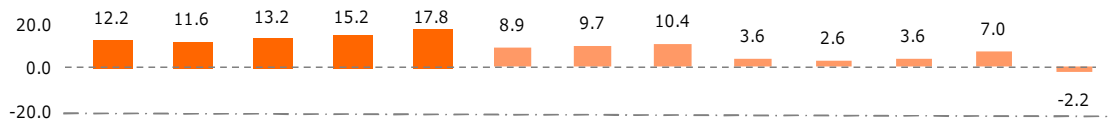
- We compared the image those in the 14 Asian cities who intend to visit Japan have of Japanese products with the image of those who do not intend to visit.
- Those who intend visiting Japan rated Japanese products higher in Excellent quality, Established reputation, Smart/fashionable image, Leading technology and Safe/secure, among other items. The biggest difference between those who intend visiting Japan and those who do not was in Safe/secure, at 17.8 points.
- Likewise, when we compared intention of purchasing products made in Japan, the scores for those who intend visiting Japan were much higher than scores for those who do not in many product categories. The differences between scores for those who intend visiting and those who do not were particularly high for Skincare products (24.7 points), Confectionery/snacks (23.7 points), Fresh food (22.7 points), and Fashion (apparel) (22.4 points), indicating that partiality for Japanese products and “made in Japan” is strong among those who intend to visit the country. It would be safe to say that those who intend visiting Japan are fans of Japanese products. Since the ability to buy authentic made in Japan products is one incentive driving intention to visit Japan, the potential for shopping tourism is likely to be extremely high.

\* In this question, the country in which Japanese products are purchased is not defined.

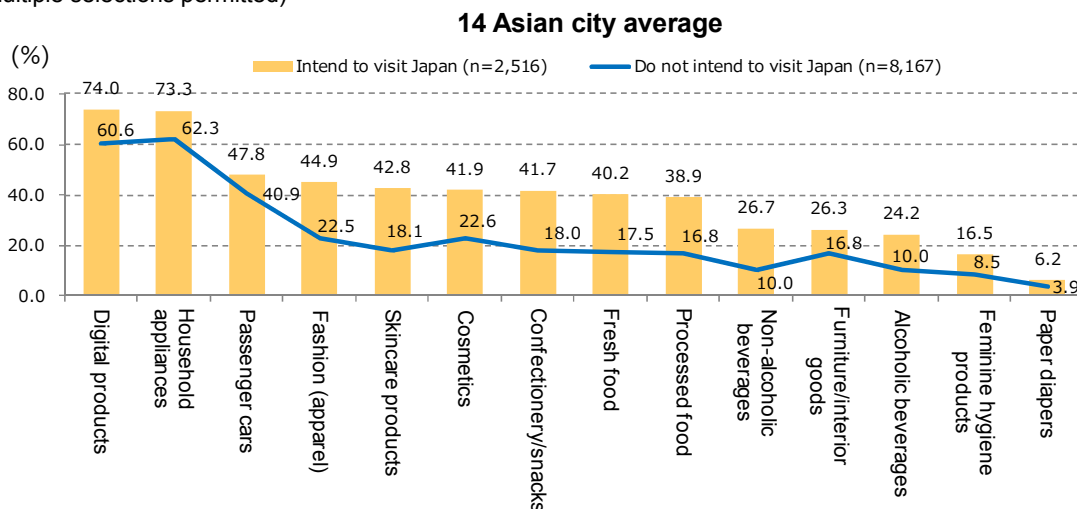
Q. This question is about the country of origin of products. What image do you have of products made in Japan? Select all statements that apply to you. (13 options/multiple selections permitted)



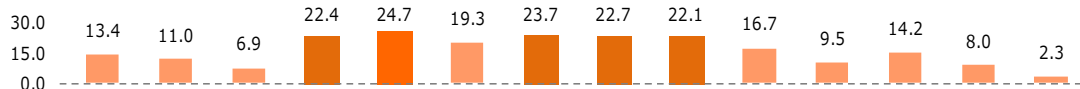
Difference: Score for those who intend visiting Japan minus score for those who do not ■ Top 5



Q. Are there any Japanese products (made in Japan) that you would like buy or try in the future? Select all products that apply to you. (14 options/multiple selections permitted)



Difference: Score for those who intend visiting Japan minus score for those who do not ■ Top 5



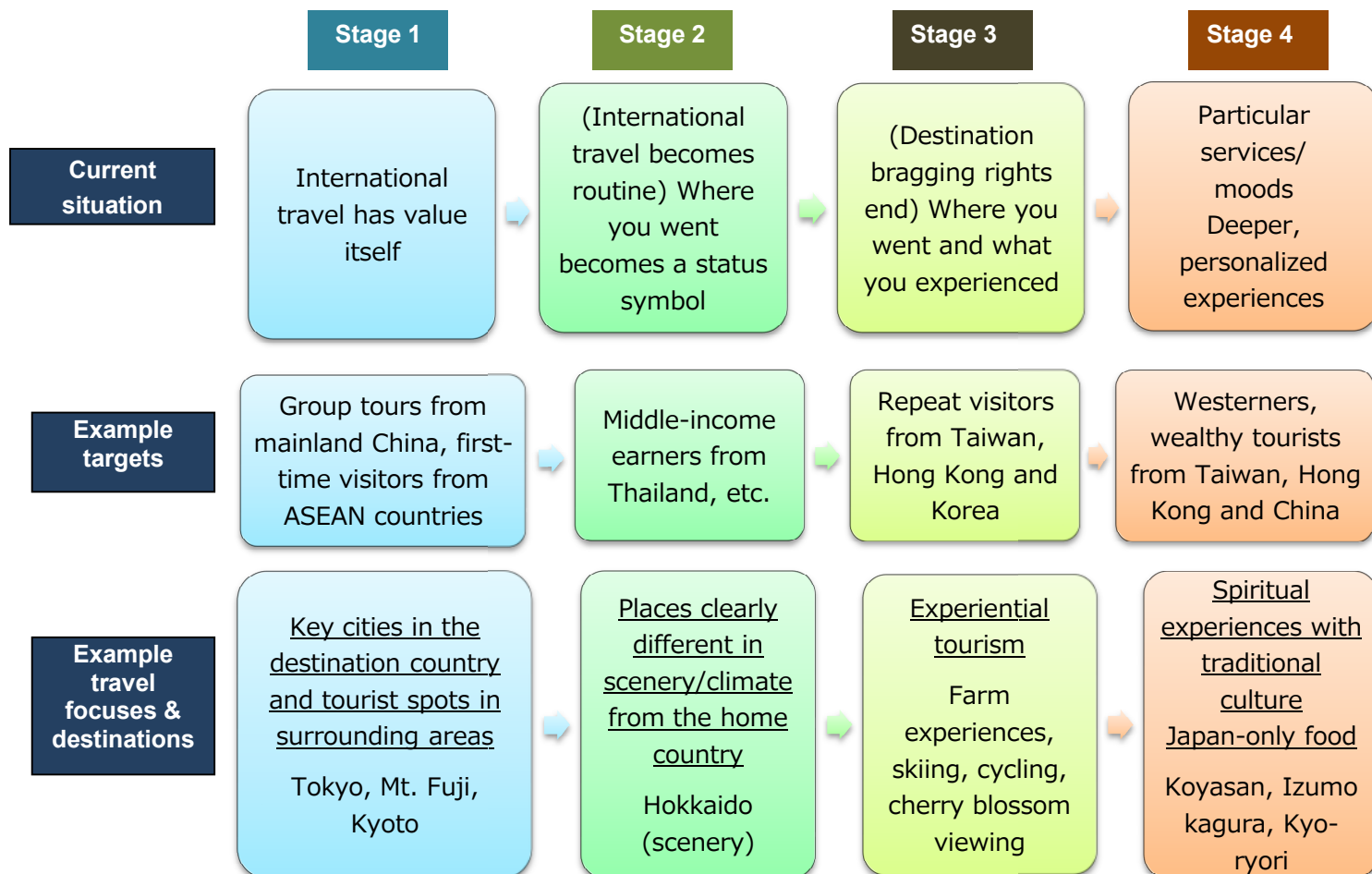


## Hint 2: Provide tourist resources tailored to what those that intend visiting plan to do while in Japan (the things, goods and experiences that foreign tourists are looking for)

Now let us leave Global HABIT data for a moment and look at some findings from Study of Japanese Tourist Spots Popular with International Tourists (2014), a study conducted by Hakuho's R&D Division. There are a variety of tourist attractions across Japan, so we summarized points to consider in order to meet the needs of foreign tourists coming to Japan.

At present, tourists from many countries visit Japan, but the tourist spots they favor seem to vary depending on whether they have previous Japan travel experience, and the depth/shallowness of their experience of international travel. One reason for this seems to be the number of years and the depth to which tourism has become entrenched in visitors' home countries. We created a simple graphic representation of current stages in international travel by country and income level. As shown, we believe that after an initial phase where international travel is a status symbol by itself, tourists' needs become more diverse step by step as the focus of their travel to Japan moves toward more valuable experiences.

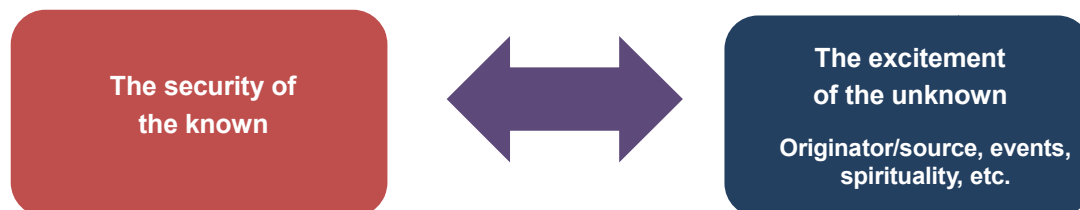
For this reason, it is vital to pin-point what targets who intend to visit Japan are coming for, and to send appropriate communication and information to provide attractions (experiential value) tailored to their needs.



We classified the experiential value that foreign tourists look for in Japan into two main categories

Providing Japanese versions of experiences/values that coincide with foreigner visitors' tastes and daily lives

Providing experiences/values only available in Japan



"The security of the known" can be viewed as a Japan experience that is an extension foreign visitors' tastes and everyday lives. However, it is vital to provide an experience of the real Japan, not one that conforms too closely to foreign visitors' tastes.

Conversely, although "the excitement of the unknown" is experiences that can only be had in Japan, it is important to give foreign tourists linguistic, informational and other support. Experiences where both these are balanced seem to be successful in drawing large numbers of customers.

## Overview of survey data used in this report

### Cities surveyed (16 cities):

Hong Kong, Taipei, Seoul, Shanghai, Beijing, Guangzhou, Singapore, Kuala Lumpur, Bangkok, Metro Manila, Jakarta, Ho Chi Minh City, Delhi, Mumbai, New York, Sao Paulo

### Respondents: Males and females aged 15–54

Sample size: 11,687

Survey period: Late May–early September 2014

## Global HABIT®

Hakuhodo Audience and Brand-User's index for Targeting

Global HABIT is a comprehensive Hakuhodo survey and database that has grown to cover 35 major cities worldwide since 2000. Survey data is collected every year, enabling not only comparisons between cities, but also time-series comparison of single cities. Single-source Global HABIT surveys probe individual *sei-katsu-sha*'s lifestyles, values, media contact, purchase attitudes and use, and perceptions of brands in many categories. This enables analysis not only of brand users, but of brand supporters at differing levels of perception (would consider purchasing, favor brand, brand fans, etc.).

### Overview of Global HABIT 2014 survey

**Cities surveyed:** Hong Kong; Taipei (Taiwan); Seoul (Korea); Singapore; Kuala Lumpur (Malaysia); Bangkok (Thailand); Metro Manila (Philippines); Jakarta (Indonesia); Ho Chi Minh City (Vietnam); Yangon (Myanmar); Shanghai, Beijing, Guangzhou (China); Delhi, Mumbai (India); New York (USA); Sao Paulo (Brazil)

The cities Dalian, Shenyang, Wuhan, Chengdu, Hangzhou, Ningbo, Xian, Fuzhou (China); Sydney (Australia); Frankfurt, Berlin (Germany); Paris (France); Milan (Italy); Madrid (Spain); Los Angeles, Chicago (USA); London (UK) and Moscow (Russia) were surveyed in 2013 or earlier.

**Respondents:** Either 500 or 800 males and females aged 15–54 per city

- In Shanghai, Beijing and Guangzhou, an additional 1,500 male and female Chinese Power *Sei-katsu-sha* aged 25–54 with incomes of at least 20,000 RMB were also surveyed.
- In Delhi and Mumbai, an additional 1,000 male and female Indian Power *Sei-katsu-sha* aged 25–54 from SEC A2 with monthly household incomes of at least 40,000 INR were also surveyed.
- Responses were obtained from persons in the middle/high income bracket of each city (50–95% of the urban population) based on screening by household income.

**Survey period:** Late May–early September 2014

### Survey methods:

In-home interviews (Asian cities other than Hong Kong, Taipei and Singapore; Sao Paulo)

Individual interviews at a central location (Hong Kong, Taipei, Seoul, Singapore, New York)

**Main items surveyed** (some apply only to China and other Asian countries):

### Demographics and lifestyle

Demographics, lifestyles, environmental awareness, country-of-origin image, media/information contact, shopping, hobbies, sports, durable consumer goods ownership, category perceptions, travel, housing

### Product & service usage

Insurance, credit cards, convenience stores, airlines, passenger cars, motorcycles, AV products, home appliances, mobile phones & smartphones, computers & printers, digital cameras & digital video cameras, copiers, watches, game consoles, alcoholic & non-alcoholic beverages, foodstuffs (instant foods, snack foods), toiletries, cosmetics, personal care products, sanitary products & disposable diapers

## Study of Japanese Tourist Spots Popular with International Tourists (2014)

An exploration of the experiential values international tourists are looking for when they travel to Japan. Today, many international tourists visit tourist spots other than the main tourist draw cards Tokyo, Mt. Fuji, Kyoto and the like. The study collected and analyzed examples of tourist spots, particularly those that Japanese themselves might consider surprising, that have successfully drawn tourists by providing them with what they are looking for. (Study period: November 2014–March 2015)

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