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Hakuhodo Audience and Brand-User's index for Targeting

HAKUHODO

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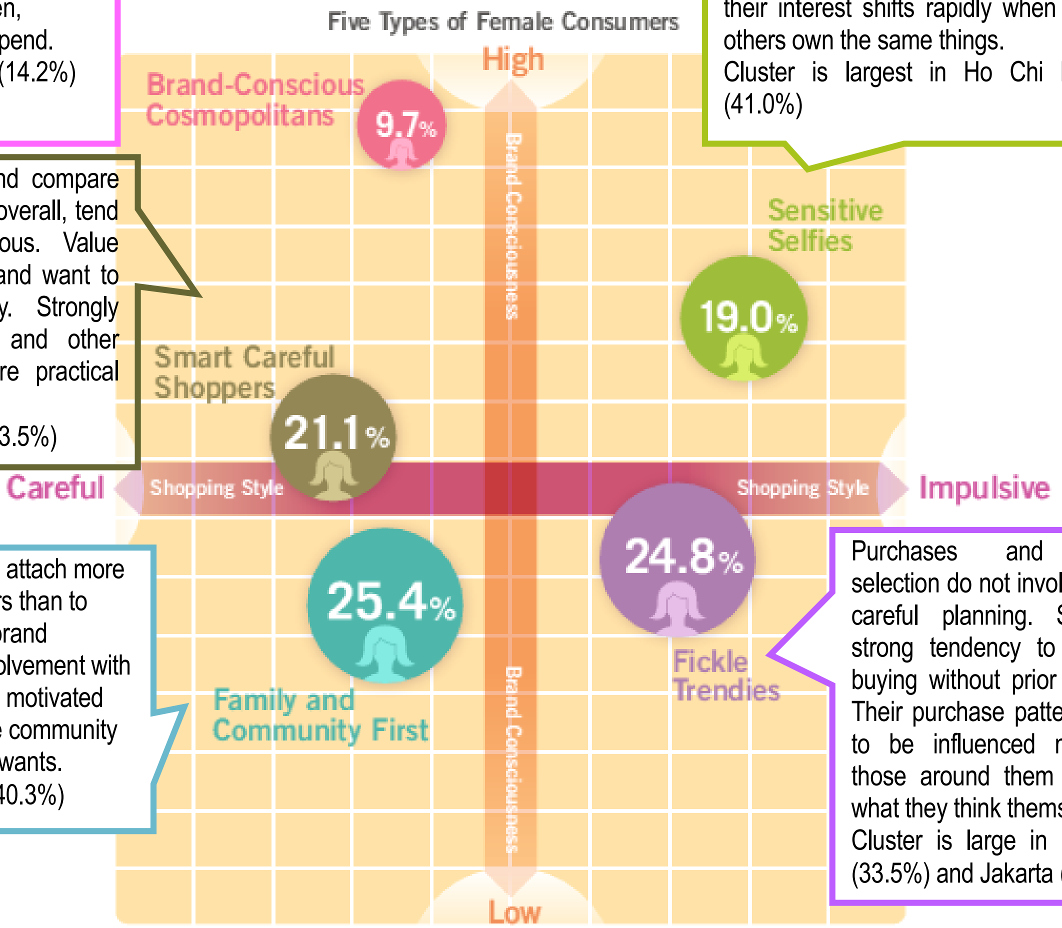
Shopping styles of middle-class women in 7 ASEAN cities: Analysis of data collected over 5 years reveals 5 types of consumers

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.

To identify lifestyles driving changes in consumption, this report analyzed survey data on consumer perceptions, purchasing behavior and brand involvement of middle-class women in seven ASEAN cities collected in the five years 2010–2014, revealing five types of female shoppers. The findings clarify differences in consumption and shopping styles that cannot be explained by differences in income and life stage alone.

Cities surveyed: 7 Asian cities (Singapore, Kuala Lumpur, Bangkok, Metro Manila, Jakarta, Ho Chi Minh City, Yangon)
Respondents: Females aged 15–54
Sample size: 10,943
Survey years: 2010 to 2014 (5 years) (Yangon surveyed in 2013 only)



Have an abundance of product information and are extremely brand conscious. Active, information-sensitive consumers, they represent a mature consumption style. Active, forward-looking women, carefree and with money to spend. Cluster is large in Singapore (14.2%) and Manila (16.8%)

Carefully plan purchases and compare prices before they buy and, overall, tend to be highly price-conscious. Value health, stability and family, and want to be of service to society. Strongly conscious of food safety and other issues, their sensibilities are practical and realistic. Cluster is largest in Manila (33.5%)

Strongly family-oriented, they attach more weight to family and neighbors than to their personal desires. Lack brand information and have low involvement with brands. In shopping, they are motivated more by family and ties to the community than by their own needs and wants. Cluster is largest in Jakarta (40.3%)

Highly brand-conscious, interested in new products and inclined to impulse purchases. Frequently visit shops to gather information, and tend to buy what they like even if the price is high. They want to be different, and their interest shifts rapidly when too many others own the same things. Cluster is largest in Ho Chi Minh City (41.0%)

Purchases and brand selection do not involve much careful planning. Show a strong tendency to impulse buying without prior thought. Their purchase patterns tend to be influenced more by those around them than by what they think themselves. Cluster is large in Bangkok (33.5%) and Jakarta (34.6%)

About the map

The vertical axis runs from highly brand-conscious consumers at the top to consumers with little brand information and low involvement with brands at the bottom. The horizontal axis runs from careful shoppers who research and calculate their purchases on the left to impulse shoppers who buy on the spur of the moment on the right.

1. Characteristics and Lifestyles of Five Types of Consumers

Brand-Conscious Cosmopolitans

These shoppers possess an abundance of product information and are extremely brand-conscious. They are active consumers in virtually every shopping category, including apparel, food and home furnishings. They spend freely on dining out, fashion for dressing up, beauty, hobbies, leisure, education and health care, but are also active savers and investors. They are strongly conscious of price points appropriate for their social status but also inclined to buy products that address environmental or other social issues. Strongly motivated to address social problems, they want to be of service to their friends and the poor. As active, information-sensitive consumers, they represent a mature consumption style. These are active, forward-looking women, carefree and with money to spend.

- A majority are white collar workers, highly educated and employed full time. Their income is slightly higher than that of other groups.
- Average age 34.5 with 30.7% unmarried.

Smart Careful Shoppers

These women carefully plan purchases and compare prices before they buy. Sometimes they make exceptions but overall they tend to be highly price conscious. They think of themselves as good shoppers. They possess a wealth of product information, are interested in new products, and tend to trust advertising. While not to the same extent as the **Brand-Conscious Cosmopolitans**, they are conscious of prices suitable for their status and are also highly concerned with environmental and other social issues. They value health, stability, and family and want to be of service to society. They are strongly conscious of food safety and other issues. Their sensibilities are practical and realistic.

- Average age 35.2 with 25.9% unmarried.

Family and Community First

These women are similar to the **Smart Careful Shoppers**. They avoid impulsive, emotional purchases and prefer to be thrifty, careful shoppers. Where they differ is in lack of brand information and low involvement with brands. They are not particularly interested in shopping or product-selection per se. Shopping, like other housework, is just part of their daily routine. Strongly family-oriented, they attach more weight to family and neighbors than to their personal desires. Their perceptions of consumption, money, and brand selection indicate that these are women who consider family and those around them more important than themselves.

- Income is a little lower than other groups; more are married and full-time housewives.
- Average age 35.9 with 23.3% unmarried.

Fickle Trendies

Neither purchases nor brand selection involve much careful planning. These women show a strong tendency to impulse purchases without prior thought. Thanks to economic development, their own or their household incomes have grown. They live in a world filled to overflowing with attractive products, and their interest shifts quickly from one to another. They show a strong desire to keep up with others and like to try new products and services, but brand involvement is low. Since they spend little time or effort on collecting information, their consumption patterns tend to be influenced more by than those around them than by what they think themselves.

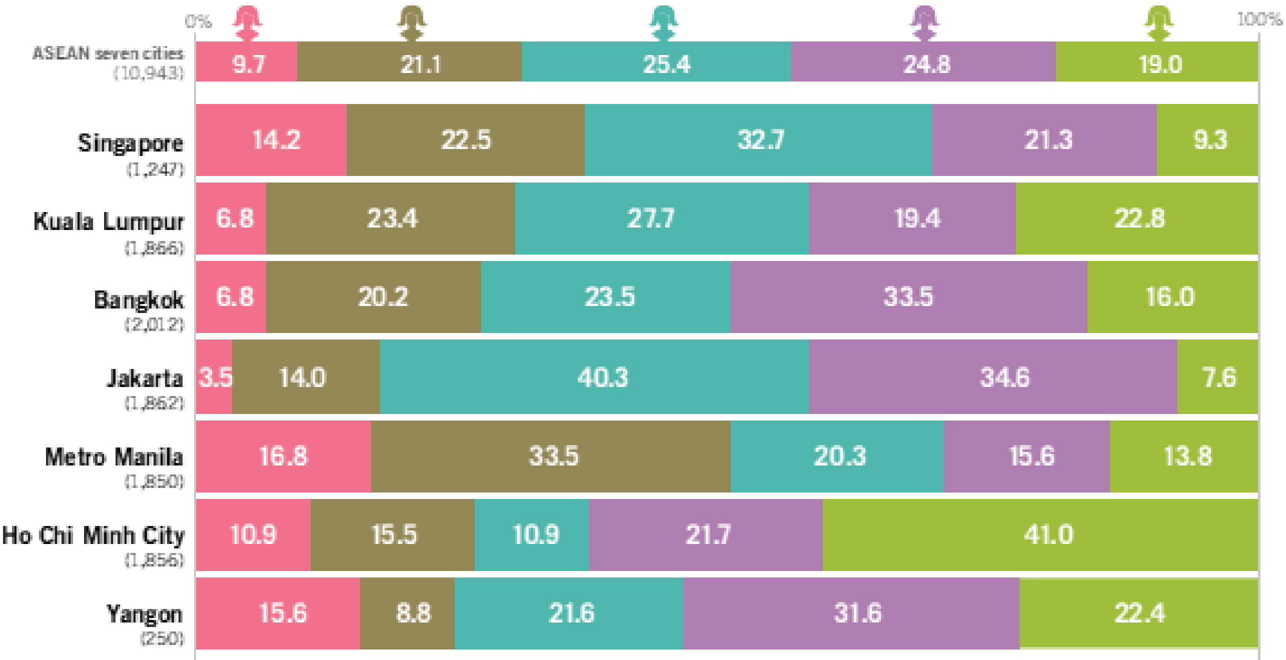
- Average age 33.1 with 32.9% unmarried.

Sensitive Selfies

In contrast to the women in **Fickle Trendies**, the women in **Sensitive Selfies** are highly brand-conscious. But like the women in **Fickle Trendies**, these women are interested in new products and inclined to impulse purchases. Afraid of falling behind and not keeping up with trends, they frequently visit shops to gather information. They also show a strong tendency to buy what they like even if the price is high and spend freely on fashion, hobbies, and socializing. These are youthful, active women. They are trendy and fashion-conscious. But they want to be different, and their interest shifts rapidly when too many others own the same things.

- Average age 33.1 with 34.1% unmarried

2. Cluster Distribution by City



Markets to keep an eye on

Big in Bangkok: **Fickle Trendies** (33.5%)
Thai women are becoming more highly educated, and more work outside the home. The birthrate has declined to a level similar to Singapore. Women increasingly see themselves as independent individuals. Slowing economic growth may, however, drive a shift from competition and striving to get ahead to a greater emphasis on stability and keeping up with others.

Big in Jakarta: **Family and Community First** (40.3%)
Abundant natural resources and a large population have made economic growth in Indonesia a focus of attention worldwide. Indonesia is, however, still a newly developing country with a high fertility rate. There is a strong trend to prioritize family over individual desires.

Big in Ho Chi Minh City: **Sensitive Selfies** (41.0%)
During the long Vietnam War and the postwar socialist government, women entered public life. Then, following the 1986 start of the Doi Moi Policy of economic liberalization, modernization and rapid economic growth combined to make women more independent. Tendencies toward impulse shopping based on individual wants and an eagerness to differentiate oneself and to stand out from others increased to a greater extent than in other ASEAN markets.

3. Hints for Activating Consumption in Each Cluster

- **Brand-Conscious Cosmopolitans** are an active consumer cluster found in all ASEAN cities, other regions and developed countries. Products, services, information and promotions that target a global market are likely to have currency with these women, too. With higher incomes and a higher propensity to consume than members of other clusters, they are primed to become enthusiastic consumers of environmentally-friendly and socially-conscious products and services, in addition to being active consumers of a variety of goods and services.

- **Smart careful shoppers** take their time when shopping to make sure they get the best deals. Since they are sensitive to information and pragmatic, value-for-money products that increase their quality of life are likely to spur these women to loosen their purse strings.

- Narratives of modernization and globalization frequently describe women being freed from traditional obligations to family and community, and active consumption a manifestation of their desire for self-expression. But in the ASEAN countries, this may not necessarily be so. With **Family and Community First,** there is a strong trend toward spurring consumption with appeals to their ties to family and community, rather than to the women themselves. Companies that offer them good family- and community-oriented products and services should be able to tap a stable market.

- **Fickle Trendies** are less brand-conscious than Sensitive Selfies but like them are prone to making impulse purchases. As their disposable income increases, they are likely to consume more. Creating reasonably-priced lines backed by easy to understand promotions is likely to be an effective way to reach them.

- **Sensitive Selfies** are young, active and in search of ways to express themselves. Many may be hoping to achieve stable white-collar employment and higher incomes that will support a Brand-Conscious Cosmopolitans lifestyle. Since they are brand-conscious and prone to impulse buying, advertising and promotions that position products as different and better than those popular with other consumers will likely resonate with them.

Appendix: Survey Data for Each Cluster

%

	Purchasing Patterns																			
	Often buys on impulse	Gathers product information	Dislikes owning what others own	Always the same brand	Always tries new brands	Compares prices before purchase	Sales person advice important	Searches for good selection	Buys what she likes even if price is high	Carefully plans most purchases	Sees herself as a smart shopper	Sees high price as sign of quality	Brand-conscious when making purchases	Sees brands as quality guarantee	Prefers foreign to domestic products	Country-conscious (whose brand)	Country-conscious (where made)	Price point is status symbol	Sees prices as fitting social class	Prefers eco-friendly products
Brand-Conscious Cosmopolitans	32.2	60.6	21.9	56.5	59.9	77.3	70.1	72.5	39.5	68.5	65.0	63.3	72.0	65.1	30.3	68.1	67.2	49.8	56.0	47.5
Smart Careful Shoppers	17.8	36.9	5.8	41.5	37.8	78.3	40.7	42.3	9.5	70.0	60.1	30.1	35.9	48.4	7.4	20.6	21.6	29.1	37.7	32.3
Family and Community First	8.0	19.1	1.9	24.3	13.5	68.9	12.3	10.7	2.0	56.3	53.4	4.6	13.4	13.2	3.7	4.4	5.5	4.8	12.4	10.3
Fickle Trendies	35.2	13.4	15.6	21.4	25.8	28.4	16.8	23.7	17.1	15.2	13.3	28.7	16.6	15.4	9.6	7.7	6.4	15.8	15.9	6.6
Sensitive Selfies	44.4	33.3	38.9	37.8	42.5	24.7	37.1	45.1	49.3	19.6	22.8	52.2	39.9	26.2	25.2	41.0	40.6	35.3	30.3	11.4

%

	The Women They Want to Be												Lifestyle										
	Family is No.1	Cherishes the people around her	Values both work and family	Generous and warm	Educated and mature	Elegant and sophisticated	Youthful	Active	Strongly independent	Successful at work	Creative	Has own sense of style	Prefers secure, stable life	Wants to stay in good shape	Wants a happy family	Relationships are important	Wants to have fun	Wants to be trendy, fashionable	Wants to be the focus of attention	Wants to help those in need	Self-sacrificing	Risk-taker	Eco-conscious
Brand-Conscious Cosmopolitans	50.6	16.2	37.7	31.1	30.9	13.3	14.8	29.8	28.2	18.2	17.2	11.4	79.8	75.7	74.9	66.3	54.1	36.4	25.1	71.0	64.9	33.9	50.2
Smart Careful Shoppers	54.6	15.3	38.4	32.8	29.7	10.0	17.2	29.3	29.4	16.0	15.0	11.6	72.1	66.4	59.4	50.6	37.3	18.8	12.3	51.8	44.8	19.1	30.9
Family and Community First	58.4	12.7	32.8	41.0	21.7	7.3	19.7	29.9	33.9	12.6	13.8	11.0	54.8	52.0	39.5	30.8	20.2	8.3	6.9	29.0	20.5	7.5	13.4
Fickle Trendies	50.4	15.2	33.0	38.3	24.8	11.1	21.7	28.2	30.2	15.9	14.1	12.3	46.5	41.0	33.2	29.2	29.7	15.3	10.8	29.5	19.0	13.9	13.2
Sensitive Selfies	45.8	20.1	35.1	29.9	30.4	18.1	23.3	28.5	24.3	17.2	15.2	10.8	53.3	44.1	41.0	41.5	44.5	36.5	24.5	44.1	34.7	28.1	22.1

%

	Information Sources					What They Spend Money On											
	Fears falling behind	Wants to be first to know	Ads as hints for new lifestyles	POS	Ads for company and product information	Dining out	Going out	Cosmetics, fashion, accessories	Hair, makeup, personal care	Non-travel recreation	Hobbies	Training and self-cultivation	Children's education	Health and relaxation	Medical checkups and preventive medicine	Savings not for retirement	Stocks or other investments
Brand-Conscious Cosmopolitans	37.7	37.8	62.9	46.4	63.6	65.6	67.2	43.3	58.5	47.0	46.5	30.1	49.9	53.2	45.9	73.3	13.4
Smart Careful Shoppers	29.8	23.3	45.7	34.0	45.7	49.7	60.1	27.4	42.1	33.3	34.6	24.3	49.8	42.9	35.8	63.8	6.7
Family and Community First	14.9	10.7	24.9	15.6	19.0	41.9	44.9	19.2	32.8	22.5	24.4	17.5	48.5	28.6	28.8	57.3	4.4
Fickle Trendies	17.7	13.7	23.7	17.6	17.8	45.0	51.2	22.2	39.6	23.2	28.3	20.9	40.1	30.5	28.9	54.4	4.5
Sensitive Selfies	33.1	30.5	40.9	39.2	32.0	58.6	69.8	43.4	53.0	38.3	43.6	29.9	44.3	44.2	41.5	60.9	7.7

Data and Analysis
This study analyzes data concerning women aged 15 to 54 from Hakuhodo Global HABIT surveys conducted in seven ASEAN cities. To understand the lifestyles that form the background to changes in consumption, we have combined data collected over a five-year period from 2010 to 2014. Yangon is an exception for which only data from 2013 are available. Total sample n is 10,943. The cluster analysis of female consumers in seven ASEAN cities is based on twenty questions related to consumer perceptions.

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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

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