



Global **HABIT**[®]

Hakuhodo Audience and Brand-User's index for Targeting

Report 2016

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 major cities around the world, mainly in Asia. With 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/ex survey and Seikatsu Teiten survey, which Hakuhodo conducts in Japan. 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. In addition, since the data sets also include company and “made-in” image figures, the data can be analyzed across a multitude of factors to suit client needs. 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 image. 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* insight philosophy. We think of *sei-katsu-sha* not merely as 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/ex 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/ex survey in Japan is conducted separately from the Global HABIT survey.

24 cities in Asia and Oceania

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

Survey frame

● Respondents: 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, Seoul, Singapore and Kuala Lumpur 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

● Survey period: May–August

● Number of survey items: Approximately 900 items

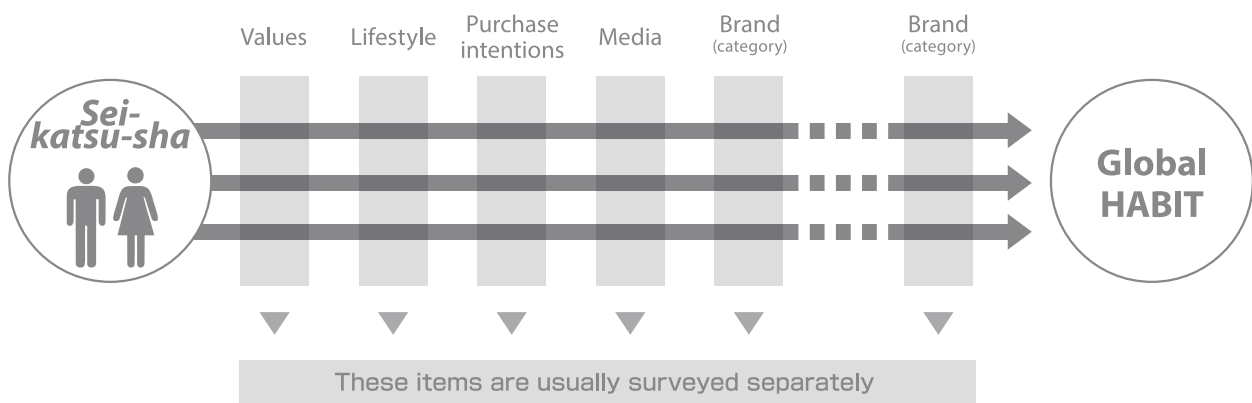
● Data for major cities updated every year

● Evaluates brands using HakuHodo's original scales

Single-source data

In the Global HABIL survey, we question the same respondents (single source) on numerous topics, such as lifestyle priorities, values, media contact, purchase intentions, and their use and perceptions 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, "made-in" image, travel, China Seikatsu Teiten survey items (Beijing, Shanghai, Guangzhou)

Products

Passenger cars, motorcycles, tires, audio/video products, home appliances, computers and printers, mobile phones/smartphones, digital 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

(Some items surveyed in Asia only)

Introducing the 2015 Survey Data

Information

Smartphones and mobile phones are indispensable tools for people in every city. Word-of-mouth is an important information communication tool.

- In many cities, My mobile phone/smartphone is essential to my life makes the top three, showing the high level of importance phones have in daily life. In addition, Word of mouth is an important means of communication ranks high in many cities and tops the list in cities including Yangon and Mumbai.
- The majority of cities also indicate the substantial influence of TV. I switch channels while watching a TV program ranks in the top three in Jakarta, Yangon, Delhi, Mumbai, and Moscow and I keep the TV on without watching a particular program is among the top three answers in Bangkok, Jakarta, Yangon and Moscow.
- In Hong Kong, Taipei, Seoul, Singapore and Kuala Lumpur, I often get information from media websites makes the top three. New York also shows a similar tendency.

(%)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th
	My mobile phone/smartphone is essential to my life	Word of mouth is an important means of communication	Like ads that explain products' features properly	Have my own way of collecting information	Switch channels while watching a TV program	Ads tell us a new way of life	Keep the TV on without watching a particular program	Ads are effective way to learn about companies, products	Often get information from media websites	Always pass new information to others	Try to learn about new products, services before others	Afraid of not keeping up with the information age	Put more trust in product information given at stores	Not confident about products that are not advertised	Often get information from corporate websites
GH 2015 (15-city average)	157.1	251.7	340.8	440.5	538.5	38.0	36.6	33.9	33.5	31.5	26.5	25.3	24.3	23.1	20.0
Hong Kong	171.8	271.0	452.4	548.9	22.6	34.0	42.0	42.5	361.5	36.0	34.8	19.8	26.8	14.8	35.1
Taipei	179.6	274.5	462.4	39.4	39.6	544.5	33.6	40.1	374.4	31.9	29.5	30.3	19.9	18.1	26.6
Seoul	184.8	458.4	366.0	38.2	44.4	43.6	35.0	43.4	273.0	549.4	44.8	20.8	19.8	14.4	37.4
Shanghai	148.9	148.9	26.2	336.0	19.8	434.4	531.5	24.7	13.1	27.5	22.2	21.6	17.4	26.9	15.3
Beijing	140.3	238.8	23.3	530.0	23.3	22.3	23.8	15.6	17.7	430.7	28.5	331.2	20.6	18.3	23.3
Guangzhou	339.4	140.6	27.6	239.6	28.9	24.1	28.2	21.6	22.1	430.9	22.0	529.4	27.7	21.1	20.0
Singapore	167.3	257.6	538.4	440.2	19.6	27.1	17.5	28.2	345.1	31.4	18.6	21.6	15.5	12.9	28.0
Kuala Lumpur	171.0	547.1	355.6	37.8	37.3	448.2	25.6	547.1	255.9	38.5	30.1	25.8	27.3	24.8	28.9
Bangkok	247.3	29.1	537.0	151.4	443.0	36.3	345.1	28.0	18.0	26.8	31.5	29.6	33.4	27.0	13.6
Metro Manila	164.9	251.3	346.6	34.0	33.1	36.4	37.9	440.6	540.5	20.4	31.8	20.4	19.4	30.5	25.1
Jakarta	343.6	534.0	28.6	25.5	164.4	29.0	253.7	442.9	16.7	11.2	8.0	28.3	25.6	20.6	5.1
Ho Chi Minh City	153.1	350.8	34.0	252.3	27.3	537.0	23.9	30.5	30.8	27.8	19.5	34.5	445.5	27.1	23.1
Yangon	443.6	150.8	539.4	21.6	248.4	27.0	346.4	20.2	19.8	21.6	10.6	29.2	10.4	30.8	6.2
Delhi	251.5	448.8	26.5	546.7	158.7	351.1	43.3	33.5	14.0	30.8	28.9	17.3	13.2	31.5	4.5
Mumbai	559.3	177.3	56.3	57.9	364.9	267.7	57.0	46.0	15.1	459.7	33.9	18.0	32.5	23.7	12.7
Moscow	162.6	22.6	25.8	528.0	236.2	14.8	333.4	430.6	19.0	19.6	9.0	9.0	21.2	5.4	17.6
(Reference)															
New York (2014)	262.4	164.6	548.7	35.6	33.0	17.5	43.1	35.4	354.1	452.1	26.4	12.5	13.7	9.5	29.0
Sao Paulo (2014)	438.7	152.3	31.1	34.7	251.1	534.9	348.5	30.5	25.9	19.6	12.0	23.8	34.7	20.4	27.1
Tokyo (2015)	151.1	242.3	526.0	17.6	25.4	7.7	339.8	426.4	21.3	4.0	7.5	6.8	11.5	6.8	10.7

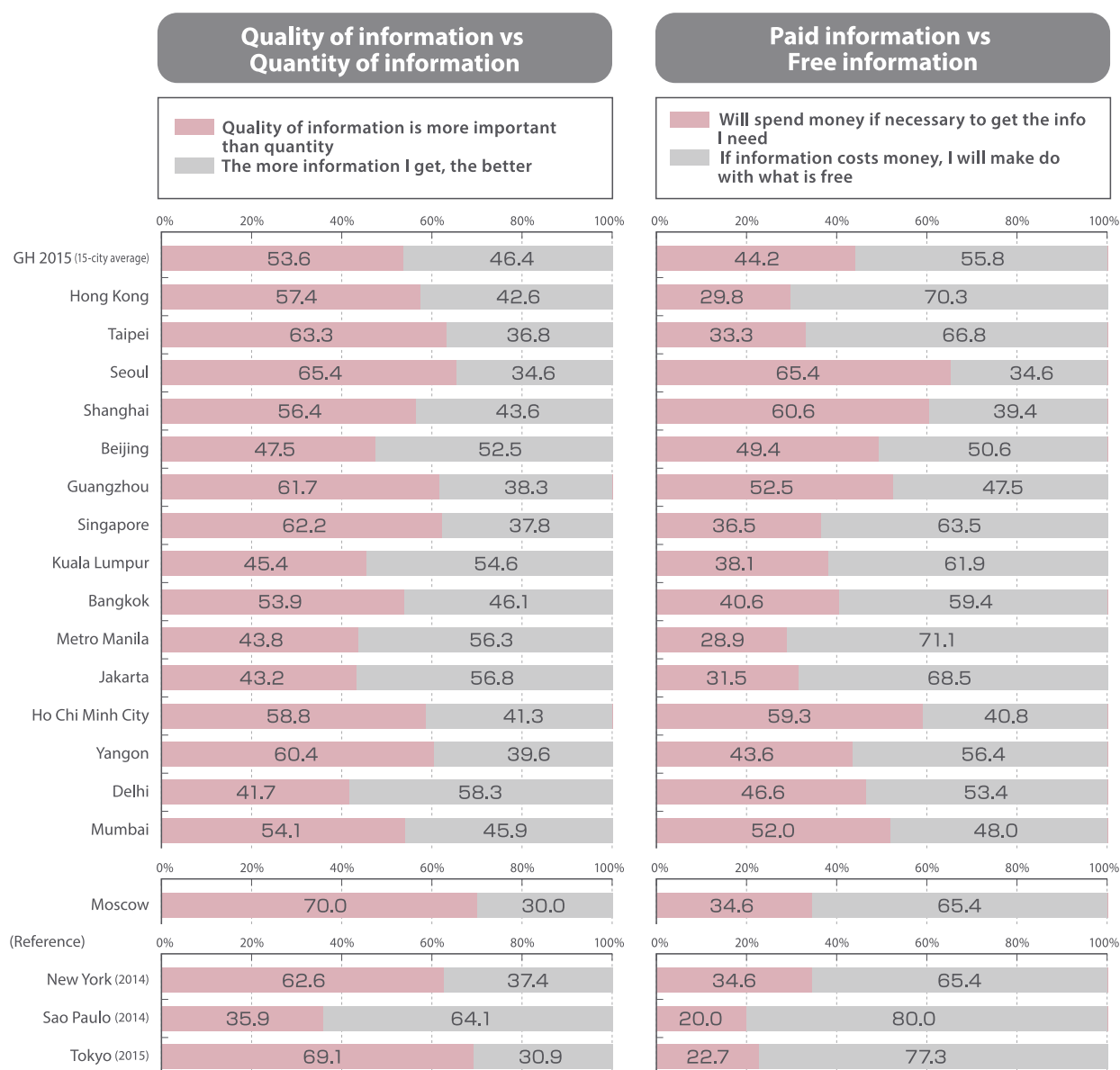
Items ranked in the top five in each city (circled numerals indicate rankings). Multiple answer (18 choices)

Values toward information

Do people favor quality or quantity? Do they go for the information they want even if they have to pay for it, or will they make do with free information?

Trends in people's values toward information quality and quantity and paid info and free info vary from city to city.

- Seoul, Shanghai, Guangzhou, Ho Chi Minh City and Mumbai have higher percentages of people who pursue information quality and will pay for information.
- On the other hand, Kuala Lumpur, Metro Manila, Jakarta, and Delhi show preferences for information quantity and free information. A similar trend is also seen in Sao Paulo.
- Hong Kong, Taipei, Singapore, Bangkok, Yangon and Moscow have higher percentages of people who pursue information quality and free information. A similar trend is also apparent in New York and Tokyo.



Introducing the 2015 Survey Data

Media with easy-to-comprehend information

In all cities, TV ranks No. 1. TV's rating, as an easy-to-understand mass medium/advertising medium, is unshakable.

- TV scores an overwhelmingly high mark, followed by Internet accessed from a smartphone and Internet accessed from a computer, at least one of which ranks in the top three in ten cities (Hong Kong, Taipei, Seoul, Shanghai, Beijing, Singapore, Bangkok, Metro Manila, Jakarta, and Moscow). Internet accessed from a tablet device makes the top five in Taipei, Singapore and Moscow.
- On the other hand, a number of cities rate newspapers' ease of understanding highly, with paper newspapers ranking in the top three in seven cities (Guangzhou, Kuala Lumpur, Bangkok, Jakarta, Ho Chi Minh City, Yangon, and Mumbai). In Hong Kong and Seoul, digital newspapers rate higher than paper newspapers.
- Meanwhile, LCD-screen ads is ranked among the top three media in Guangzhou, Ho Chi Minh City and Mumbai, and radio in Kuala Lumpur and Metro Manila. Additionally, outdoor billboards and bus ads make the top three in Delhi, indicating different trends from city to city.

(%)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th	16th	17th	18th	19th
	TV	Internet accessed from a smartphone	Internet accessed from a computer	Newspapers [paper]	Outdoor billboards	Bus ads	LCD-screen ads	Radio	Train and subway ads	Newspapers [digital]	Ads at theaters and movie theaters	Internet accessed from a tablet device	Free papers/free magazines	Magazines [paper]	Magazines [digital]	Specialty magazines/trade magazines [paper]	Specialty magazines/trade magazines [digital]	Internet accessed from a mobile phone	Journals (Yangon only)
GH 2015 (15-city average)	178.5	242.9	338.4	438.3	531.5	30.6	28.6	27.4	26.0	20.0	20.0	19.6	18.9	18.2	12.6	11.7	10.0	9.9	—
Hong Kong	185.4	268.0	365.5	38.0	34.1	44.0	36.4	51.4	40.9	46.1	25.3	46.8	52.4	29.9	30.1	19.3	19.1	20.9	—
Taipei	177.3	261.6	352.1	443.5	32.0	33.3	28.1	32.1	33.0	33.3	22.1	542.3	23.0	34.6	25.6	22.3	20.6	11.5	—
Seoul	178.8	273.0	366.2	524.0	10.6	18.6	9.2	17.0	16.4	448.4	20.6	21.6	3.8	12.4	19.8	9.6	18.6	15.4	—
Shanghai	177.4	343.5	250.1	28.6	442.0	40.0	540.7	15.6	37.4	7.7	25.1	12.0	24.8	22.8	7.9	8.1	6.4	2.2	—
Beijing	155.0	336.4	241.0	23.3	431.5	525.5	20.9	15.9	23.3	20.9	19.1	20.6	11.6	19.0	19.2	16.1	12.8	4.2	—
Guangzhou	143.5	38.6	38.1	242.5	441.5	37.5	341.7	17.0	539.6	8.4	30.3	23.5	32.7	23.2	11.6	14.3	7.5	3.0	—
Singapore	164.5	256.9	353.5	444.7	16.3	21.6	14.7	30.0	22.5	23.5	14.9	535.5	22.2	17.1	13.3	10.8	9.4	20.2	—
Kuala Lumpur	164.9	449.3	345.7	253.5	37.9	39.2	38.1	351.8	35.9	36.9	38.1	41.4	45.0	36.7	30.7	34.7	30.1	25.2	—
Bangkok	188.1	239.6	19.3	332.8	522.5	19.3	14.4	429.1	13.8	9.0	11.3	9.8	14.3	17.1	5.4	5.0	3.6	11.9	—
Metro Manila	193.5	25.0	339.0	435.5	528.8	20.1	22.8	251.1	16.3	9.3	7.4	18.8	9.6	12.9	5.5	6.3	5.3	11.9	—
Jakarta	188.0	222.5	7.1	13.4	8.4	511.5	10.0	412.2	9.1	2.6	2.2	3.5	2.1	4.6	1.0	1.0	1.1	8.2	—
Ho Chi Minh City	194.8	42.8	45.4	259.8	546.0	39.6	353.4	12.6	15.8	453.3	17.1	15.8	12.3	19.8	15.8	19.8	14.0	10.3	—
Yangon	191.4	528.2	3.8	337.8	437.6	19.6	13.6	6.6	0.2	0.2	1.4	1.2	0.0	4.8	0.2	0.6	0.4	0.0	241.4
Delhi	186.6	22.9	11.3	433.6	337.6	240.6	18.4	13.2	531.5	0.6	8.3	0.1	9.8	4.0	0.0	1.0	0.2	1.1	—
Mumbai	188.8	546.0	40.4	259.5	33.9	35.5	347.0	44.4	39.3	5.6	446.6	2.4	9.1	6.9	1.7	1.6	1.0	5.5	—
Moscow	179.4	433.2	250.8	21.8	19.2	18.4	15.2	333.6	16.2	7.6	8.6	524.2	16.0	18.8	6.2	12.2	7.0	6.6	—
(Reference)																			
New York (2014)	155.5	340.0	244.5	—	36.2	33.8	34.4	339.0	33.8	—	36.4	439.8	35.0	—	—	—	—	28.6	—
Sao Paulo (2014)	189.8	431.5	334.3	—	5.0	8.4	4.8	241.1	7.8	—	2.8	7.8	522.0	—	—	—	—	5.0	—

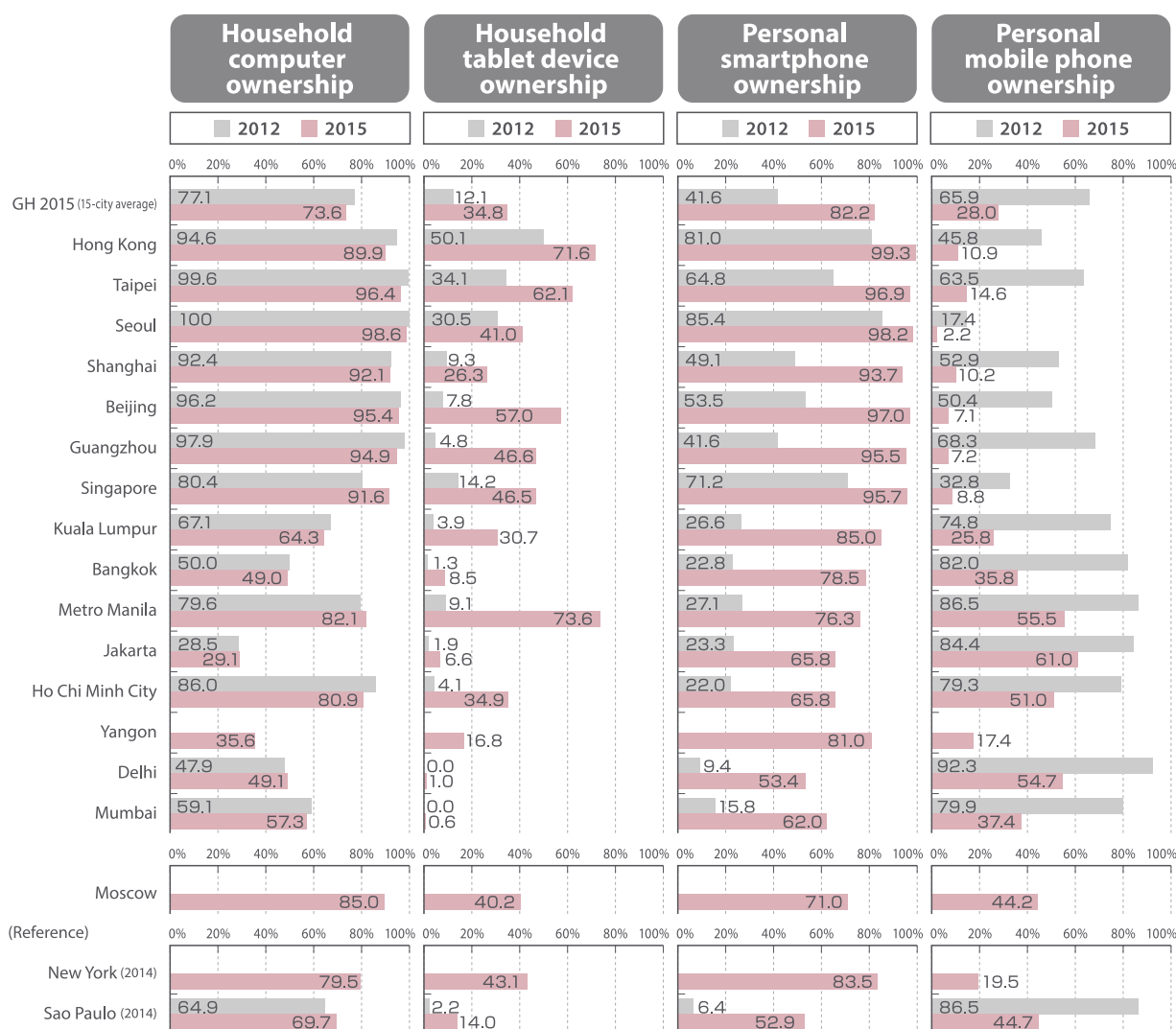
■ Items ranked in the top five in each city (circled numerals indicate rankings). Multiple answer (18 choices; 19 for Yangon)

Ownership of information devices with Internet connectivity

In all cities, ownership of smartphones has increased sharply.

A number of cities have made the transition from mobile phones to smartphones.

- Personal ownership of smartphones exceeds 80% in the 15-city average (compared to a little over 40% in 2012). Nearly everyone has a smartphone in Hong Kong, Taipei, Seoul, Singapore, Shanghai, Beijing, and Guangzhou.
- Hong Kong, Taipei, Seoul, Singapore, Shanghai, Beijing and Guangzhou show extremely high household ownership of computers, at around 90% or more.
- Growth in household ownership of tablet devices is remarkable in cities including Metro Manila, Hong Kong, Taipei and Beijing.
- While ownership of mobile phones is declining, more than 50% of consumers in Metro Manila, Jakarta, Ho Chi Minh City, and Delhi still own mobile phones. In Yangon, it is believed that consumers skipped mobile phones and went straight to smartphones.



Introducing the 2015 Survey Data

Favorite sports

In Asia overall, the sports that enjoy high popularity are soccer, badminton and swimming. However, consumers' tastes vary from city to city.

- Soccer/Football makes the top three in many cities and ranks No. 1 in Seoul, Shanghai, Beijing, Guangzhou, Bangkok, Jakarta, Ho Chi Minh City and Yangon. Badminton tops the list in Kuala Lumpur, while swimming heads the list in Hong Kong and Singapore. These two sports are also among the top five in other cities in Asia.
- Favorite sports vary from city to city. Basketball tops the list in Metro Manila and makes the top three in Taipei, Shanghai, Beijing and Guangzhou. Cycling ranks No. 1 in Taipei and also ranks in the top three in Hong Kong and Seoul. Volleyball makes the top three in Bangkok and Metro Manila. Cricket is overwhelmingly popular in India (Delhi and Mumbai). Baseball ranks second in Seoul and fifth in Taipei.

(%)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	13th	15th	22nd	23rd	25th			
	Soccer/Football	Badminton	Swimming	Basketball	Cycling	Volleyball	Cricket	Table tennis	Tennis	Boxing	Motor sports	Baseball	Figure skating/ Ice skating	American football	Ice hockey	Field hockey	Sepak Takraw (excl. India/China)	Muay Thai (Bangkok only)	
GH 2015 (15-city average)	①36.8	②29.3	③24.6	④23.0	⑤16.3	14.2	11.8	11.5	11.3	8.3	7.8	6.7	5.4	1.8	1.6	0.8	—	—	
Hong Kong	④33.8	③52.8	①59.1	⑤33.0	②55.6	17.0	0.9	23.4	16.4	16.0	17.9	3.1	18.1	4.6	4.1	1.4	0.3	—	
Taipei	7.3	④39.5	②46.5	③42.8	①51.4	15.0	0.3	21.6	16.9	9.1	15.4	⑤27.4	12.8	4.3	3.1	0.0	0.3	—	
Seoul	①49.8	⑤25.0	④28.6	21.4	③34.8	7.8	0.0	15.2	12.2	11.6	5.8	②43.2	17.2	3.4	1.6	0.0	0.4	—	
Shanghai	①49.5	⑤23.6	③25.2	②43.6	4.7	15.6	0.1	21.1	④24.2	6.8	11.0	8.1	6.8	0.7	1.9	0.4	—	—	
Beijing	①42.9	③31.1	④25.8	③36.3	6.2	12.0	0.9	⑤20.9	10.3	5.9	4.0	4.3	7.3	1.5	2.7	0.4	—	—	
Guangzhou	①52.5	②41.9	26.5	③35.3	5.3	16.0	0.1	⑤27.1	④28.3	5.6	10.7	8.0	8.9	1.7	4.3	0.4	—	—	
Singapore	③29.6	②30.2	①41.2	⑤13.3	④25.9	6.7	0.8	5.1	8.6	5.1	5.5	1.6	3.3	1.8	1.6	0.6	2.2	—	
Kuala Lumpur	②38.5	①61.0	③33.7	⑤16.0	④29.0	14.9	1.7	9.5	7.3	7.6	15.0	3.1	3.9	3.9	2.7	4.3	11.5	—	
Bangkok	①65.6	④13.0	⑤12.6	7.1	4.8	②33.0	0.0	3.8	10.1	12.3	6.1	1.0	0.4	1.0	0.1	0.1	9.3	③15.3	
Metro Manila	4.6	③28.5	④19.1	①58.4	5.0	②37.5	0.4	6.1	6.0	⑤17.0	6.1	5.8	1.3	1.5	0.1	0.1	1.1	—	
Jakarta	①46.1	②19.1	③11.4	5.7	⑥7.6	④9.4	0.0	2.7	2.7	5.5	5.2	0.4	0.1	0.5	0.0	0.0	0.4	—	
Ho Chi Minh City	①45.5	③12.8	②18.9	4.4	1.1	④7.8	0.0	2.6	⑥4.6	3.4	1.8	0.3	0.5	0.0	0.1	0.1	0.4	—	
Yangon	①74.4	③23.8	②27.4	5.4	④21.6	9.2	0.8	2.6	3.2	8.8	5.8	1.0	2.6	2.0	0.8	0.4	⑤18.4	—	
Delhi	③6.4	②8.6	⑤1.5	0.5	0.2	1.3	①69.1	0.6	④1.6	0.6	0.1	0.0	0.0	0.0	0.4	⑥1.5	—	—	
Mumbai	②22.5	③19.7	1.4	⑤12.1	5.0	3.3	①84.8	5.4	④13.1	9.1	4.8	3.0	0.5	1.3	0.6	2.3	—	—	
Moscow	①42.0	6.6	⑤17.8	12.6	8.4	14.2	1.0	8.2	15.0	④18.6	6.0	0.6	②26.2	2.0	③23.2	0.8	0.0	—	
(Reference)																			
New York (2014)	②43.1	7.2	⑤27.0	③37.8	8.0	16.5	2.0	11.1	17.7	12.7	9.9	①43.7	14.7	④32.0	22.3	4.0	0.6	—	
Sao Paulo (2014)	①74.3	0.0	③16.0	⑤15.0	5.4	②43.9	0.0	2.8	5.8	③16.0	⑤15.0	0.8	3.8	3.0	0.2	0.2	0.2	—	

■ Items ranked in the top five in each city (circled numerals indicate rankings)
Multiple answer (26 choices for each country, with additional choices in some countries)

Impact of sports sponsorship

If a company sponsors sports, the company and its products and services will score higher in terms of interest, and in feelings of closeness and community contribution.

- In the 15-city average, more than 60% of consumers indicate that the sports sponsorship would have a positive impact on these elements. For companies that operate abroad, sponsorship of sports is likely to be a highly effective means—aside from their products and services themselves—of fostering feelings of closeness and that they are contributing to the community among consumers in the countries where they work.
- Scores for Would become more interested in the company are particularly high in Taipei, Metro Manila, Jakarta and Yangon, at over 80%.
- Tallies for Would feel closer to the company's products or services exceed 80% in Taipei, Shanghai, Metro Manila and Yangon.
- Scores for Would feel that the company is contributing to the community & society are in excess of 80% in Shanghai, Kuala Lumpur, Metro Manila and Yangon.

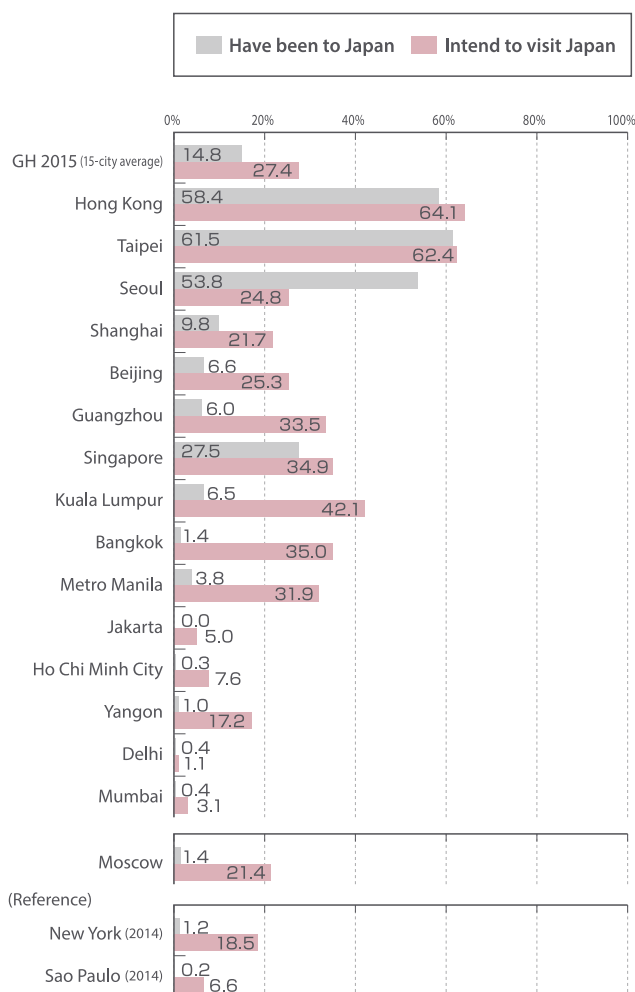


Introducing the 2015 Survey Data

Experience and intention of visiting Japan

Hong Kong and Taipei show remarkably high rates of experience of visiting Japan and intention of doing so. Despite low levels of experience visiting Japan, the Chinese and ASEAN cities show relatively high scores for intention of visiting.

- Percentages for Have been to Japan and Intend to visit Japan are both high, at around 60%, in Hong Kong and Taipei, indicating that there is a fairly large group of repeat visitors. By age group, intention to visit Japan is high at around 70% among those in their teens and 20s in these two cities and, in Hong Kong, the percentage exceeds 50% across all age groups.
- While scores for Have been to Japan are still low, at less than 10%, in the three cities in China (Shanghai, Beijing, and Guangzhou), scores for Intend to visit Japan are more than double this.
- Among the Southeast Asian cities, Singapore shows particularly high rates of experience of visiting Japan and intention of visiting. While Kuala Lumpur, Bangkok, and Metro Manila have low rates of experience of visiting Japan, their rates of intention of visiting exceed 30%.
- Jakarta, Ho Chi Minh City and the two cities in India (Delhi and Mumbai) seem to have lower interest in visiting Japan.



	Intention of visiting Japan by age group						
	Overall		15-19	20-29	30-39	40-49	50-59
	%	n	%	%	%	%	
GH 2015 (15-city average)	27.4	11,204	33.3	31.4	26.6	24.9	19.5
Hong Kong	64.1	800	75.0	72.0	63.0	58.0	52.0
Taipei	62.4	800	75.0	68.5	60.0	60.5	46.0
Seoul	24.8	500	43.3	27.3	20.3	19.4	21.7
Shanghai	21.7	810	25.0	26.4	24.5	19.2	8.8
Beijing	25.3	807	25.0	32.2	26.4	18.9	22.0
Guangzhou	33.5	805	43.0	38.0	32.2	32.8	19.6
Singapore	34.9	510	42.6	36.4	37.5	28.3	32.3
Kuala Lumpur	42.1	818	44.2	51.7	43.7	36.9	27.5
Bangkok	35.0	800	44.0	37.0	34.5	35.0	23.0
Metro Manila	31.9	800	37.0	35.5	26.0	35.0	25.0
Jakarta	5.0	801	10.0	7.0	4.5	2.5	2.0
Ho Chi Minh City	7.6	800	12.0	8.5	7.0	6.5	5.0
Yangon	17.2	500	21.7	26.6	13.3	13.7	8.3
Delhi	1.1	816	3.0	1.5	1.0	0.5	0.0
Mumbai	3.1	837	4.5	3.3	3.4	2.4	2.0
Moscow	21.4	500	21.7	28.9	18.0	16.9	21.7
(Reference) New York (2014)	18.5	503	15.0	25.0	15.5	18.4	14.8
(Reference) Sao Paulo (2014)	6.6	501	10.0	9.4	4.7	4.8	5.0

Things consumers want to do while visiting Japan

(based on those who intend to visit)

Sightseeing cultural and historical buildings, Enjoying specialty foods, Seeing splendid natural scenery, Relaxing at a hot spring resort and Shopping are popular.

- In addition to the Japan tourism favorites above, consumers also show an inclination toward enjoy modern Japan, including Seeing modern cities, Visiting an amusement park and Enjoying the nightlife.
- Among the cities with warm weather throughout the year, including Hong Kong, Taipei, Singapore, Kuala Lumpur and Ho Chi Minh City, the popularity of Skiing is high.
- While the shopping sprees of the Chinese are much talked about, Mountain climbing or hiking is also popular among consumers in Shanghai and Beijing.
- In Kuala Lumpur, Enjoying traditional performing arts, such as Noh, Kabuki and Touring Japan's leading technologies score around 40%, indicating wide-ranging interests and tastes in that city.

(%)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th	14th	15th
	Sightseeing cultural and historical buildings	Enjoying specialty foods	Seeing splendid natural scenery	Relaxing at a hot spring resort	Enjoying shopping	Seeing modern cities	Visiting an amusement park	Enjoying the nightlife	Skiing	Enjoying traditional performing arts, such as Noh, Kabuki	Going to Japanese anime/comic/game events/shops	Mountain climbing or hiking	Marine sports	Touring Japan's leading technologies (factories)	Attending a musical or a popular singer's concert
GH 2015 (15-city average) (n=3,065)	①75.1	②71.4	③70.6	④64.0	⑤56.0	51.9	46.8	37.3	30.5	28.4	26.3	20.1	16.2	15.8	15.2
Hong Kong (n=513)	⑤72.7	②92.0	④84.8	③86.5	①96.5	48.7	70.6	39.4	52.2	31.6	36.8	14.8	29.0	10.1	15.2
Taipei (n=499)	②84.4	①87.8	③76.8	④76.2	⑤72.5	46.9	58.5	38.5	38.7	37.9	19.8	12.6	19.2	13.8	12.6
Seoul (n=124)	③55.6	①73.4	④52.4	②62.1	37.1	⑤42.7	41.9	25.0	4.0	23.4	24.2	5.6	4.8	5.6	5.6
Shanghai (n=176)	③64.8	②68.8	④62.5	①71.0	⑤53.4	49.4	34.7	32.4	30.1	21.0	11.9	46.6	8.0	1.1	10.2
Beijing (n=204)	①81.4	②56.4	③53.9	41.2	⑤46.1	④52.5	33.3	33.3	12.7	23.5	26.5	38.7	15.2	13.2	16.7
Guangzhou (n=270)	①64.4	⑤55.6	②61.5	④56.3	41.9	③57.8	30.0	30.0	23.7	21.5	25.9	19.3	17.8	14.1	23.7
Singapore (n=178)	①85.4	③71.3	⑤61.8	②74.2	④62.4	42.1	49.4	48.3	29.8	23.0	20.8	25.8	11.2	10.7	12.9
Kuala Lumpur (n=344)	①82.3	③71.5	②76.7	⑤63.1	51.5	④69.8	46.2	56.4	49.1	42.7	37.2	28.8	22.1	39.0	22.1
Bangkok (n=280)	①86.4	③58.6	②67.1	④52.1	22.9	⑤50.4	25.4	17.9	8.2	15.7	14.3	6.1	5.4	18.6	12.5
Metro Manila (n=255)	②60.4	③58.8	①69.8	43.1	27.5	⑤45.1	④46.3	30.6	14.5	23.1	32.5	18.4	5.9	20.0	12.2
Jakarta (n=40)	②62.5	⑤37.5	①72.5	10.0	30.0	④40.0	③42.5	20.0	7.5	22.5	30.0	17.5	2.5	10.0	7.5
Ho Chi Minh City (n=61)	①83.6	③77.0	②80.3	④73.8	21.3	⑤72.1	42.6	65.6	45.9	36.1	31.1	26.2	11.5	11.5	23.0
Yangon (n=86)	①73.3	45.3	②67.4	50.0	④58.1	③62.8	26.7	⑤57.0	8.1	18.6	17.4	23.3	11.6	18.6	17.4
Delhi (n=9)*	44.4	33.3	33.3	0.0	44.4	66.7	33.3	33.3	11.1	11.1	0.0	0.0	11.1	11.1	11.1
Mumbai (n=26)*	38.5	34.6	57.7	15.4	38.5	53.8	50.0	15.4	15.4	26.9	30.8	15.4	30.8	19.2	15.4
Moscow (n=107)	①98.1	②74.8	③72.9	45.8	47.7	④52.3	47.7	29.9	1.9	⑤51.4	31.8	5.6	6.5	24.3	14.0
(Reference)															
New York (2014) (n=93)	①91.4	②64.5	④55.9	⑤50.5	0.0	③60.2	40.9	49.5	5.4	35.5	26.9	20.4	16.1	25.8	23.7
Sao Paulo (2014) (n=33)	①69.7	18.2	⑤21.2	④24.2	0.0	①69.7	18.2	③45.5	6.1	3.0	15.2	6.1	6.1	12.1	6.1

Items ranked in the top five in each city (circled numerals indicate rankings). Multiple answer (21 choices)

* Delhi and Mumbai figures for reference only, as sample sizes are small.

Introducing the 2015 Survey Data

Image of products made in Japan

Products made in Japan have an image of having excellent quality. Scores for Established reputation, Leading technology and Safe/secure are also high, indicating strong trust in products made in Japan.

- Excellent quality tops the list in nearly all cities, and Established reputation also makes the top three in the majority of cities, showing a high level of trust in products made in Japan.
- Leading technology and/or Safe/secure rank in the top three in Hong Kong, Taipei, Beijing, Kuala Lumpur, Bangkok, Jakarta, Ho Chi Minh City, and Yangon, while they also rank high in other cities.
- Smart/fashionable tops the list in Guangzhou, and also makes the top three in Seoul, Singapore, Metro Manila, Delhi and Mumbai.
- In addition, Active/growing is in the top three in Shanghai and Delhi and Energy saving ranks in the top three in Guangzhou. In Kuala Lumpur, Environmentally conscious and Energy saving are high.

(%)

	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	13th
	Excellent quality	Established reputation	Smart/fashionable	Leading technology	Safe/secure	Pioneering/innovative	Unique and clear characteristics	Active/growing	Value-for-money	Interesting/enjoyable	Environmentally conscious	Energy saving	Low cost
GH 2015 (15-city average)	①71.3	②52.9	③47.8	④47.6	⑤44.3	42.1	38.8	36.9	36.1	35.5	31.3	30.2	16.0
Hong Kong	①87.3	⑤65.8	④69.3	③70.9	②74.1	51.9	50.9	46.1	42.8	55.8	34.4	35.9	13.0
Taipei	①87.3	②71.0	⑤58.6	51.9	③69.4	④63.6	51.5	31.6	39.4	38.9	32.6	29.5	5.1
Seoul	①69.6	③44.4	②49.8	④39.4	30.4	24.4	⑤37.6	6.2	23.8	27.0	8.8	11.0	0.6
Shanghai	①68.4	②47.9	④42.2	④42.2	31.9	36.3	36.3	③43.2	27.7	27.9	39.6	36.2	26.2
Beijing	①50.4	③33.7	④30.7	②36.3	25.0	22.6	⑤25.7	22.6	25.0	22.7	22.4	23.9	24.5
Guangzhou	②44.6	34.7	①50.4	⑤36.6	④40.5	32.5	⑤36.6	30.9	30.4	34.8	34.9	③41.6	22.1
Singapore	①74.9	②58.6	③52.0	④48.0	⑤42.7	38.6	34.1	32.2	26.1	33.1	28.4	23.3	6.7
Kuala Lumpur	①73.6	63.6	57.1	②72.0	③68.7	61.4	60.3	61.1	45.5	56.8	⑤65.6	④66.9	22.1
Bangkok	①65.9	③51.5	45.8	②60.1	④47.1	⑤47.0	44.0	40.8	33.8	35.3	33.5	33.0	14.6
Metro Manila	①70.0	⑤33.1	②39.3	④33.9	16.8	③35.8	16.4	27.6	22.4	15.0	5.3	6.9	8.8
Jakarta	①75.2	②53.7	39.3	③50.2	25.5	④45.1	37.2	⑤40.2	31.6	31.2	28.7	25.1	23.1
Ho Chi Minh City	①84.1	②80.0	52.8	⑤62.4	③70.1	54.3	53.1	37.5	④63.8	45.1	42.6	49.5	19.5
Yangon	①76.0	②67.4	⑤29.6	28.6	③49.8	15.4	14.0	19.8	④38.4	25.2	11.6	7.0	4.0
Delhi	①82.0	⑤47.8	③48.7	41.1	41.1	47.2	39.2	②52.1	④48.4	40.8	34.4	29.7	23.8
Mumbai	①63.4	③44.8	②47.2	30.3	28.0	⑤38.1	33.8	④40.6	35.7	35.0	29.2	15.3	11.7
Moscow	①69.8	④56.2	34.4	②69.4	③57.2	53.4	⑤55.8	22.2	27.8	44.8	55.0	54.8	4.6
(Reference)													
New York (2014)	②39.6	④35.2	28.6	①47.7	19.9	②39.6	30.8	⑤33.4	25.2	26.0	16.1	18.3	24.1
Sao Paulo (2014)	①67.5	③42.3	②53.7	④39.7	26.3	31.9	33.3	⑤36.5	23.2	28.7	29.3	26.9	16.0

■ Items ranked in the top five in each city (circled numerals indicate rankings). Multiple answer (13 choices)

Comparison of images of products made in Japan and in other countries

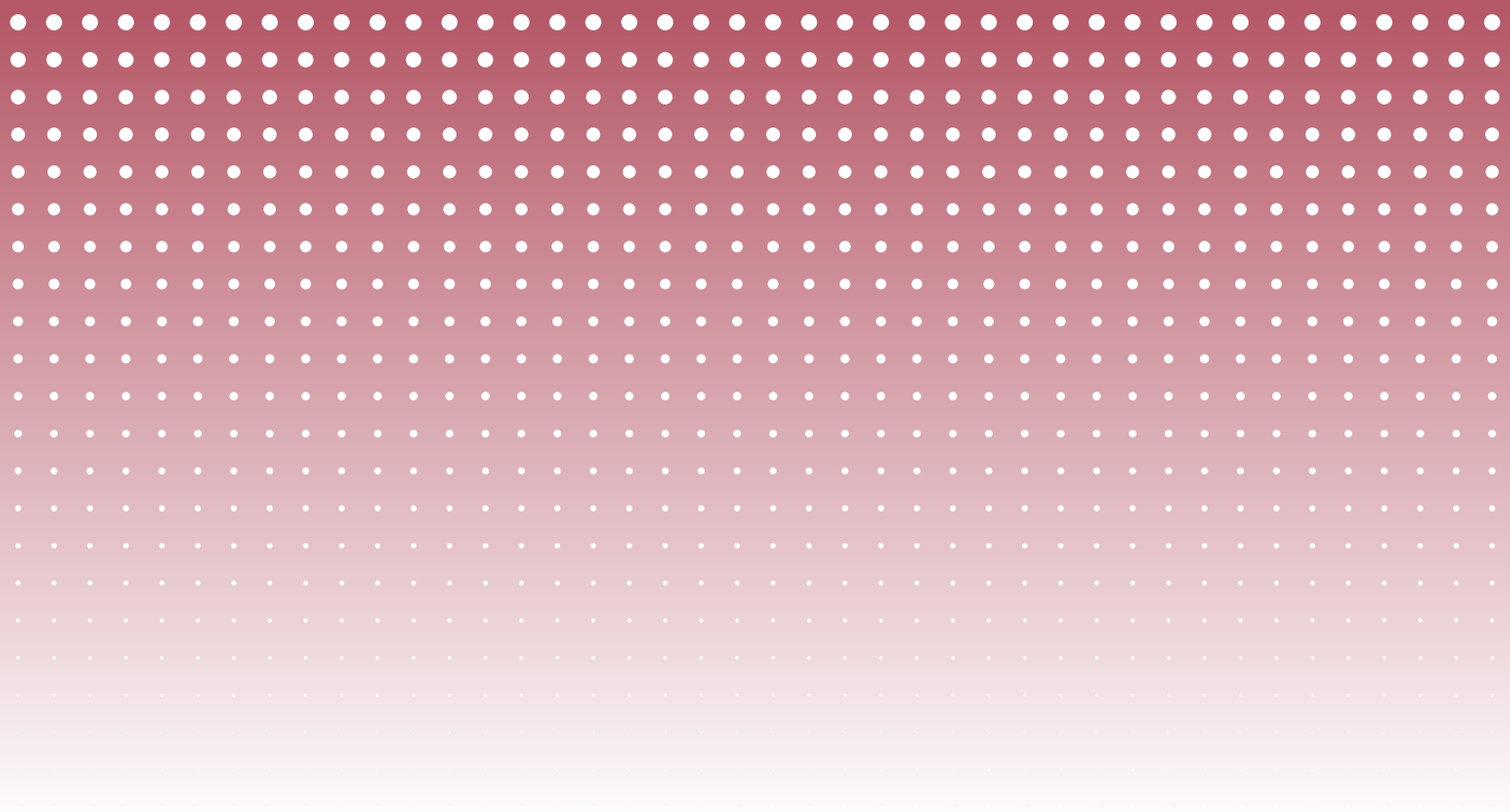
Comparing the Excellent quality, Smart/fashionable and Safe/secure images of products made in various countries, products made in Japan beat products made in other countries in Excellent quality.

- Excellent quality is higher for products made in Japan compared to products made in other countries in all fifteen cities in Asia and in Moscow.
- Smart/fashionable ratings vary from city to city. Products made in Korea top the list in Hong Kong, Taipei, Shanghai, Singapore, Kuala Lumpur and Ho Chi Minh City, while products made in the US rank No. 1 in Metro Manila, Jakarta, Yangon, Delhi, Mumbai and Moscow.
- In Safe/secure, products made in Japan top the list in many cities, while products made in the US rank No. 1 in Shanghai, Metro Manila and Jakarta.
- A comprehensive analysis of the three images reveals that compared to in other cities, Thai products are rated relatively higher in Ho Chi Minh City and Yangon, and Chinese products are rated relatively higher in Delhi and Mumbai.

(%)

	Excellent quality					Smart/fashionable image					Safe/secure				
	Japanese products	US products	Korean products	Chinese products	Thai Products	Japanese products	US products	Korean products	Chinese products	Thai Products	Japanese products	US products	Korean products	Chinese products	Thai Products
GH 2015 (15-city average)	①71.3	②51.1	③31.1	17.1	17.2	①47.8	②46.5	③46.0	19.4	18.5	①44.3	②39.1	③25.5	13.7	15.3
Hong Kong	①87.3	②58.0	③33.9	2.0	8.1	②69.3	③41.9	①72.3	1.0	7.3	①74.1	②70.0	③34.6	2.3	6.5
Taipei	①87.3	②51.9	③19.9	0.9	4.9	②58.6	③47.8	①70.6	0.9	9.4	①69.4	②43.5	③8.0	1.3	1.5
Seoul	①69.6	②48.0	③45.8	0.2	0.8	①49.8	②42.4	③34.0	0.4	0.4	③30.4	②33.4	①37.2	0.4	1.0
Shanghai	①68.4	②33.0	28.0	③28.3	13.5	②42.2	③41.4	①42.3	28.1	15.3	③31.9	①45.3	②33.7	27.0	17.4
Beijing	①50.4	②24.9	20.2	③22.9	9.2	①30.7	②28.6	③26.0	22.3	18.0	①25.0	20.8	②22.6	③21.4	15.6
Guangzhou	①44.6	③28.4	②29.6	26.0	18.8	①50.4	③33.3	②39.1	25.6	28.8	①40.5	②37.0	③33.0	24.7	18.3
Singapore	①74.9	②50.2	③39.8	3.9	5.1	②52.0	③39.8	①58.4	6.5	11.6	①42.7	②33.1	③18.0	4.3	3.9
Kuala Lumpur	①73.6	②64.1	③50.1	16.9	15.9	③57.1	②57.7	①59.4	18.0	14.4	①68.7	②58.1	③45.0	14.4	13.2
Bangkok	①65.9	②53.8	28.8	15.3	③36.3	①45.8	③38.1	②45.1	21.6	26.9	①47.1	②32.8	21.5	12.5	②32.8
Metro Manila	①70.0	②67.4	③20.5	10.0	13.0	③39.3	①47.1	②39.9	14.4	13.1	②16.8	①19.6	③8.0	3.4	6.1
Jakarta	①75.2	②55.3	③28.2	22.0	16.0	②39.3	①45.6	③37.1	29.3	15.0	②25.5	①25.6	③15.6	15.4	11.5
Ho Chi Minh City	①84.1	②72.0	③45.0	4.9	39.8	③52.8	②62.4	①66.4	20.1	50.8	①70.1	②65.3	③52.6	6.8	39.4
Yangon	①76.0	②56.0	29.2	5.4	③36.0	③29.6	①54.6	②54.4	12.6	19.8	①49.8	②39.2	19.8	4.6	③35.8
Delhi	①82.0	②48.7	38.1	③47.1	26.3	②48.7	①58.7	35.7	③41.5	25.6	①41.1	③31.5	22.4	②34.8	17.2
Mumbai	①63.4	②55.4	17.1	③34.1	11.8	②47.2	①56.5	14.2	③33.7	12.1	①28.0	②27.5	10.3	③19.6	7.3
Moscow	①69.8	②43.8	③24.4	7.4	5.0	②34.4	①35.6	③20.6	15.0	11.2	①57.2	②21.2	③20.2	6.6	6.4
(Reference)															
New York (2014)	②39.6	①74.4	16.5	③19.9	—	②28.6	①64.4	9.5	③13.1	—	②19.9	①70.6	8.7	③9.3	—
Sao Paulo (2014)	①67.5	②64.9	③15.2	12.8	—	②53.7	①56.7	③23.2	21.8	—	②26.3	①27.7	3.6	③4.6	—

■ Items ranked in the top five in each city (circled numerals indicate rankings). Multiple answer



HAKUHODO