

Asian *sei-katsu-sha*'s image of products made in various countries

- Japanese products have Excellent quality image. Established reputation, Leading technology, Safe/secure images also high: Trust in Japanese products is firm. Top three items associated with Japan: Household appliances and audio/visual devices, Digital products, Private cars.
- Images of US products, items associated with the US very similar to those of Japan.
- Thai products have same overall image as Chinese products, but have an Excellent quality image in Ho Chi Minh City, Yangon, Delhi and Mumbai. Items associated with Thailand: No. 1 Sightseeing, No. 2 Food, No. 3 Fashion products (apparel)

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 major cities in Asia and around the world, the survey polls middle- and high-income earners. We have analyzed data from the most recent Global HABIT survey (conducted in 2015) from a variety of perspectives to discover hints on potential opportunities in the global marketplace.

In this report, we present findings from analysis of the images *sei-katsu-sha*¹ in 15 Asian cities have toward products made in various countries.

The advent of the Trans-Pacific Partnership (TPP) and ASEAN Economic Community (AEC) are expected to change companies' supply chains. This report has been prepared as a reference to help companies differentiate their products from those of other companies and secure advantages for themselves in an increasingly fiercely competitive Asian market place.

15 cities covered: Hong Kong, Taipei, Seoul, Shanghai, Beijing, Guangzhou, Singapore, Bangkok, Jakarta, Kuala Lumpur, Metro Manila, Ho Chi Minh City, Yangon, Delhi, Mumbai

We also introduce data from Moscow (Russia), New York (USA) and Sao Paulo (Brazil) for reference.

■ Japanese products

In image of Japanese products, Excellent quality (71.3%) tops the 15-city average, followed by Established reputation (52.9%) at No. 2, indicating a high degree of trust in Japanese products. Scores for No. 3 Smart/fashionable (47.8%) and No. 4 Leading technology (47.6%) are almost the same, and slightly ahead of Safe/secure (44.3%) at No. 5. In goods, services and entertainment associated with Japan, Household appliances and audio/visual devices, Digital products and Private cars make up the top 3, followed by Anime/manga/cartoons/comics, Food and Sightseeing. Looking at the data city by city, durable consumer goods make up the top 3 in most cities, but Anime/manga/cartoons/comics topped the list in Seoul. In Ho Chi Minh City, Medical care appears in the top 5.

■ US products

The order of images for US products is almost the same as for Japanese products, indicating that Asian *sei-katsu-sha* have quite similar images of products from the two countries. However, the Excellent quality rating for US products is 51.1%, around 20 points lower than the score for Japanese products. By city, the scores for Smart/fashionable are higher than those for Excellent quality in the three Chinese and two Indian cities. In goods, services and entertainment associated with the US, Digital products, Household appliances and audio/visual devices and Private cars rank high, as they do in Japan, and Movies appears in the top 3.

■ Korean products

The top images of Korean products are Smart/fashionable (46.0%) at No. 1, Active/growing image (38.4%) at No. 2, and Excellent quality (31.1%) at No. 3. The top 3 goods, services and entertainment associated with Korea are Fashion products (apparel), Digital products and Cosmetics, with Household appliances and audio/visual devices following at No. 4.

¹ Since the 1980s, the centerpiece of Hakuhodo's philosophy has been *sei-katsu-sha* insight. *Sei-katsu-sha*, which literally means "living person," stands in contrast to the word Japanese marketers typically use for consumer, *shohisha*. "*Sei-katsu-sha*" expresses the holistic person—an individual with a lifestyle, aspirations and dreams. All the branding work we do in partnership with our clients follows from *sei-katsu-sha* insight.

■ Chinese products

The top images of Chinese products are Low cost (64.9%) at No. 1, Value for money (25.2%) at No. 2 and Active/growing image (24.9%) at No. 3. In goods, services and entertainment associated with China, Food is No. 1 and Sightseeing No. 2, with Digital products, Household appliances and audio/visual devices rounding out the top 5.

■ Thai products

In image of Thai products, Low cost (42.6%) is No. 1, Value for money (25.9%) No. 2 and Active/growing image (23.0%) No. 3; a similar pattern of images to Chinese products. However, in Ho Chi Minh City, Yangon and the two Indian cities, scores for Excellent quality and Established reputation come in higher than Low cost in nearly all instances, a different trend from that observed in other cities. In goods, services and entertainment associated with Thailand, Sightseeing is No. 1 and Food No. 2, while Household appliances and audio/visual devices and Digital products do not appear in the top 5.

Reference: Indian products

Our data on image of Indian products, taken only in the two Indian cities, has a score of over 90% for Excellent quality and scores of at least 70% for all other items, indicating that Indians place a high degree of trust in their national products.

Details of the survey findings

1. Image of products made in various countries

The table below shows the results of a comparison of the 15-city average scores for products made in various countries. (The city by city results can be found in the following pages)

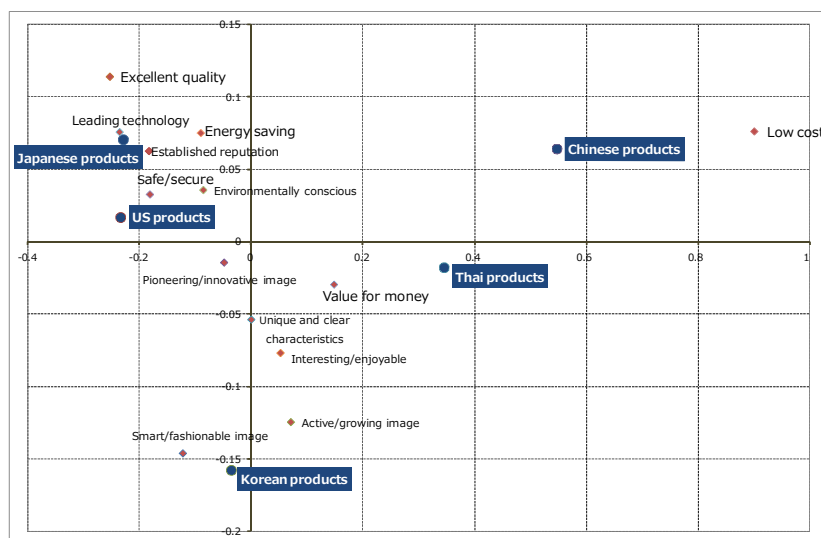
- In image of Japanese products, Excellent quality (71.3%) is No. 1 and Established reputation (52.9%) No. 2, indicating that trust in Japanese products is solid. Scores for No. 3 Smart/fashionable (47.8%) and No. 4 Leading technology (47.6%) are almost the same, and slightly ahead of Safe/secure (44.3%) at No. 5. In the city by city results, too, Excellent quality is No. 1 in 14 of the 15 Asian cities surveyed.
- The order of the images of US products is almost the same as that of Japanese products, suggesting that Asian *sei-katsu-sha* have quite similar images of products from the two countries. However, the Excellent quality rating for US products is 51.1%, some 20 points lower than the rating for Japanese products. In the city by city results, the scores for Smart/fashionable are higher than those for Excellent quality in the three Chinese and two Indian cities.
- The top images of Korean products are Smart/fashionable (46.0%) at No. 1, Active/growing image (38.4%) at No. 2, and Excellent quality (31.1%) at No. 3.
- The top images of Chinese products are Low cost (64.9%) at No. 1, Value for money (25.2%) at No. 2 and Active/growing image (24.9%) at No. 3.
- In image of Thai products, Low cost (42.6%) is No. 1, Value for money (25.9%) No. 2 and Active/growing image (23.0%) No. 3, a similar pattern of images to that of Chinese products. However, in Ho Chi Minh City, Yangon and the two Indian cities, Low cost does not appear in the top 3, with scores for Excellent quality and Established reputation gaining higher scores in nearly all instances.
- Data on image of Indian products were taken in the two Indian cities (Delhi, Mumbai) only, but Excellent quality scores over 90% and all other items score at least 70%, showing the high level of trust that Indians place in their national products.

Q. What image do you have of the following product countries of origin? (Multiple response; 13 options)

■ Image of products made in different countries: 15-city average

	1	2	3	4	5	6	7	8	9	10	11	12	13
Japanese products	Excellent quality (71.3%)	Established reputation (52.9%)	Smart/fashionable (47.8%)	Leading technology (47.6%)	Safe/secure (44.3%)	Pioneering/innovative (42.1%)	Unique and clear characteristics (38.8%)	Active/growing (36.9%)	Value for money (36.1%)	Interesting/enjoyable (35.5%)	Environmentally conscious (31.3%)	Energy saving (30.2%)	Low cost (16.0%)
US products	Excellent quality (51.1%)	Established reputation (50.3%)	Smart/fashionable (46.5%)	Leading technology (44.6%)	Safe/secure (39.1%)	Pioneering/innovative (38.4%)	Active/growing (35.8%)	Unique and clear characteristics (34.2%)	Value for money (29.8%)	Interesting/enjoyable (28.9%)	Environmentally conscious (25.9%)	Energy saving (24.0%)	Low cost (12.5%)
Korean products	Smart/fashionable (46.0%)	Active/growing (38.4%)	Excellent quality (31.1%)	Pioneering/innovative (30.8%)	Unique and clear characteristics (30.3%)	Interesting/enjoyable (29.8%)	Value for money (29.0%)	Established reputation (28.8%)	Safe/secure (25.5%)	Leading technology (24.8%)	Low cost (23.7%)	Environmentally conscious (18.8%)	Energy saving (16.0%)
Chinese products	Low cost (64.9%)	Value for money (25.2%)	Active/growing (24.9%)	Pioneering/innovative (21.2%)	Smart/fashionable (19.4%)	Interesting/enjoyable (19.1%)	Unique and clear characteristics (18.8%)	Established reputation (17.8%)	Excellent quality (17.1%)	Leading technology (14.4%)	Safe/secure (13.7%)	Environmentally conscious (13.0%)	Energy saving (12.1%)
Thai products	Low cost (42.6%)	Value for money (25.9%)	Active/growing (23.0%)	Unique and clear characteristics (22.3%)	Interesting/enjoyable (22.1%)	Smart/fashionable (18.5%)	Established reputation (17.6%)	Pioneering/innovative (17.3%)	Excellent quality (17.2%)	Safe/secure (15.3%)	Leading technology (12.4%)	Environmentally conscious (12.2%)	Energy saving (11.5%)
Reference													
Indian products [Delhi]	Excellent quality (94.6%)	Low cost (86.3%)	Active/growing (84.2%)	Smart/fashionable (83.3%)	Leading technology (83.0%)	Established reputation (82.5%)	Safe/secure (81.4%)	Energy saving (80.6%)	Value for money (79.9%)	Pioneering/innovative (78.8%)	Unique and clear characteristics (77.6%)	Environmentally conscious (77.5%)	Interesting/enjoyable (75.6%)
Indian products [Mumbai]	Excellent quality (92.2%)	Established reputation (84.0%)	Smart/fashionable (83.2%)	Active/growing (82.6%)	Safe/secure (81.5%)	Pioneering/innovative (81.0%)	Value for money (80.9%)	Unique and clear characteristics (80.0%)	Interesting/enjoyable (78.4%)	Low cost (76.2%)	Leading technology (75.7%)	Environmentally conscious (73.0%)	Energy saving (66.5%)

■ Image map of products made in various countries: 15-city average



About the map

The map on the left is the result of correspondence analysis of the images of products made in various countries. Items with strong associations are plotted close to each other, and those with weaker associations further apart.

Japanese and US product have relatively similar images in terms of Excellent quality, Established reputation and Safe/secure. On the other hand, Chinese and Thai products appear to be relatively closer to Low cost and Value for money. Korean products differentiate themselves from those of other countries in terms of Smart/fashionable image.

■ Image of products made in various countries: Results by city

Japanese products

	1	2	3	4	5	6	7	8	9	10	11	12	13
15-city average	Excellent quality (71.3%)	Established reputation (52.9%)	Smart/fashionable (47.8%)	Leading technology (47.6%)	Safe/secure (44.3%)	Pioneering/innovative (42.1%)	Unique and clear characteristics (38.8%)	Active/growing (36.9%)	Value for money (36.1%)	Interesting/enjoyable (35.5%)	Environmentally conscious (31.3%)	Energy saving (30.2%)	Low cost (16.0%)
Hong Kong	Excellent quality (87.3%)	Safe/secure (74.1%)	Leading technology (70.9%)	Smart/fashionable (69.3%)	Established reputation (65.8%)	Interesting/enjoyable (55.8%)	Pioneering/innovative (51.9%)	Unique and clear characteristics (50.9%)	Active/growing (46.1%)	Value for money (42.8%)	Energy saving (35.9%)	Environmentally conscious (34.4%)	Low cost (13.0%)
Taipei	Excellent quality (87.3%)	Established reputation (71.0%)	Safe/secure (69.4%)	Pioneering/innovative (63.6%)	Smart/fashionable (58.6%)	Leading technology (51.9%)	Unique and clear characteristics (51.5%)	Value for money (39.4%)	Interesting/enjoyable (38.9%)	Environmentally conscious (32.6%)	Active/growing (31.6%)	Energy saving (29.5%)	Low cost (5.1%)
Seoul	Excellent quality (69.6%)	Smart/fashionable (49.8%)	Established reputation (44.4%)	Leading technology (39.4%)	Unique and clear characteristics (37.6%)	Safe/secure (30.4%)	Interesting/enjoyable (27.0%)	Pioneering/innovative (24.4%)	Value for money (23.8%)	Energy saving (11.0%)	Environmentally conscious (8.8%)	Active/growing (6.2%)	Low cost (0.6%)
Shanghai	Excellent quality (68.4%)	Established reputation (47.9%)	Active/growing (43.2%)	Smart/fashionable (42.2%)	Leading technology (42.2%)	Environmentally conscious (39.6%)	Pioneering/innovative (36.3%)	Unique and clear characteristics (36.3%)	Energy saving (36.2%)	Safe/secure (31.9%)	Interesting/enjoyable (27.9%)	Value for money (27.7%)	Low cost (26.2%)
Beijing	Excellent quality (50.4%)	Leading technology (36.3%)	Established reputation (33.7%)	Smart/fashionable (30.7%)	Unique and clear characteristics (25.7%)	Value for money (25.0%)	Safe/secure (25.0%)	Low cost (24.5%)	Energy saving (23.9%)	Interesting/enjoyable (22.7%)	Active/growing (22.6%)	Pioneering/innovative (22.6%)	Environmentally conscious (22.4%)
Guangzhou	Smart/fashionable (50.4%)	Excellent quality (44.6%)	Energy saving (41.6%)	Safe/secure (40.5%)	Unique and clear characteristics (36.6%)	Leading technology (36.6%)	Environmentally conscious (34.9%)	Interesting/enjoyable (34.8%)	Established reputation (34.7%)	Pioneering/innovative (32.5%)	Active/growing (30.9%)	Value for money (30.4%)	Low cost (22.1%)
Singapore	Excellent quality (74.9%)	Established reputation (58.6%)	Smart/fashionable (52.0%)	Leading technology (48.0%)	Safe/secure (42.7%)	Pioneering/innovative (38.6%)	Unique and clear characteristics (34.1%)	Interesting/enjoyable (33.1%)	Active/growing (32.2%)	Environmentally conscious (28.4%)	Value for money (26.1%)	Energy saving (23.3%)	Low cost (6.7%)
Kuala Lumpur	Excellent quality (73.6%)	Leading technology (72.0%)	Safe/secure (68.7%)	Energy saving (66.9%)	Environmentally conscious (65.6%)	Established reputation (63.6%)	Pioneering/innovative (61.4%)	Active/growing (61.1%)	Unique and clear characteristics (60.3%)	Smart/fashionable (57.1%)	Interesting/enjoyable (56.8%)	Value for money (45.5%)	Low cost (22.1%)
Bangkok	Excellent quality (65.9%)	Leading technology (60.1%)	Established reputation (51.5%)	Safe/secure (47.1%)	Pioneering/innovative (47.0%)	Smart/fashionable (45.8%)	Unique and clear characteristics (44.0%)	Active/growing (40.8%)	Interesting/enjoyable (35.3%)	Value for money (33.8%)	Environmentally conscious (33.5%)	Energy saving (33.0%)	Low cost (14.6%)
Metro Manila	Excellent quality (70.0%)	Smart/fashionable (39.3%)	Pioneering/innovative (35.8%)	Leading technology (33.9%)	Established reputation (33.1%)	Active/growing (27.6%)	Value for money (22.4%)	Safe/secure (16.8%)	Unique and clear characteristics (16.4%)	Interesting/enjoyable (15.0%)	Low cost (8.8%)	Energy saving (6.9%)	Environmentally conscious (5.3%)
Jakarta	Excellent quality (75.2%)	Established reputation (53.7%)	Leading technology (50.2%)	Pioneering/innovative (45.1%)	Active/growing (40.2%)	Smart/fashionable (39.3%)	Unique and clear characteristics (37.2%)	Value for money (31.6%)	Interesting/enjoyable (31.2%)	Environmentally conscious (28.7%)	Safe/secure (25.5%)	Energy saving (25.1%)	Low cost (23.1%)
Ho Chi Minh City	Excellent quality (84.1%)	Established reputation (80.0%)	Safe/secure (70.1%)	Value for money (63.8%)	Leading technology (62.4%)	Pioneering/innovative (54.3%)	Unique and clear characteristics (53.1%)	Smart/fashionable (52.8%)	Energy saving (49.5%)	Interesting/enjoyable (45.1%)	Environmentally conscious (42.6%)	Active/growing (37.5%)	Low cost (19.5%)
Yangon	Excellent quality (76.0%)	Established reputation (67.4%)	Safe/secure (49.8%)	Value for money (38.4%)	Smart/fashionable (29.6%)	Leading technology (28.6%)	Interesting/enjoyable (25.2%)	Active/growing (19.8%)	Pioneering/innovative (15.4%)	Unique and clear characteristics (14.0%)	Environmentally conscious (11.6%)	Energy saving (7.0%)	Low cost (4.0%)
Delhi	Excellent quality (82.0%)	Active/growing (52.1%)	Smart/fashionable (48.7%)	Value-for-money (48.4%)	Established reputation (47.8%)	Pioneering/innovative (47.2%)	Safe/secure (41.1%)	Leading technology (41.1%)	Interesting/enjoyable (40.8%)	Unique and clear characteristics (39.2%)	Environmentally conscious (34.4%)	Energy saving (29.7%)	Low cost (23.8%)
Mumbai	Excellent quality (63.4%)	Smart/fashionable (47.2%)	Established reputation (44.8%)	Active/growing (40.6%)	Pioneering/innovative (38.1%)	Value for money (35.7%)	Interesting/enjoyable (35.0%)	Unique and clear characteristics (30.3%)	Leading technology (30.3%)	Environmentally conscious (29.2%)	Safe/secure (28.0%)	Energy saving (15.3%)	Low cost (11.7%)
Reference													
Moscow	Excellent quality (69.8%)	Leading technology (69.4%)	Safe/secure (57.2%)	Established reputation (56.2%)	Unique and clear characteristics (55.8%)	Environmentally conscious (55.0%)	Energy saving (54.8%)	Pioneering/innovative (53.4%)	Interesting/enjoyable (44.8%)	Smart/fashionable (34.4%)	Value for money (27.8%)	Active/growing (22.2%)	Low cost (4.6%)
New York (2014 survey)	Leading technology (47.7%)	Excellent quality (39.6%)	Pioneering/innovative (39.6%)	Established reputation (35.2%)	Active/growing (33.4%)	Unique and clear characteristics (30.8%)	Smart/fashionable (28.6%)	Interesting/enjoyable (26.0%)	Value for money (25.2%)	Low cost (24.1%)	Safe/secure (19.9%)	Energy saving (18.3%)	Environmentally conscious (16.1%)
Sao Paulo (2014 survey)	Excellent quality (67.5%)	Smart/fashionable (53.7%)	Established reputation (42.3%)	Leading technology (39.7%)	Active/growing (36.5%)	Unique and clear characteristics (33.3%)	Pioneering/innovative (31.9%)	Environmentally conscious (29.3%)	Interesting/enjoyable (28.7%)	Energy saving (26.9%)	Safe/secure (26.3%)	Value for money (23.2%)	Low cost (16.0%)

US products

	1	2	3	4	5	6	7	8	9	10	11	12	13
15-city average	Excellent quality (51.1%)	Established reputation (50.3%)	Smart/fashionable (46.5%)	Leading technology (44.6%)	Safe/secure (39.1%)	Pioneering/innovative (38.4%)	Active/growing (35.8%)	Unique and clear characteristics (34.2%)	Value for money (29.8%)	Interesting/enjoyable (28.9%)	Environmentally conscious (25.9%)	Energy saving (24.0%)	Low cost (12.5%)
Hong Kong	Safe/secure (70.0%)	Leading technology (60.1%)	Established reputation (58.4%)	Excellent quality (58.0%)	Smart/fashionable (41.9%)	Pioneering/innovative (38.9%)	Active/growing (38.1%)	Unique and clear characteristics (33.3%)	Interesting/enjoyable (25.8%)	Value for money (23.8%)	Environmentally conscious (23.4%)	Energy saving (23.4%)	Low cost (7.8%)
Taipei	Leading technology (59.6%)	Pioneering/innovative (57.8%)	Excellent quality (51.9%)	Smart/fashionable (47.8%)	Established reputation (45.5%)	Safe/secure (43.5%)	Unique and clear characteristics (41.8%)	Active/growing (37.3%)	Interesting/enjoyable (26.1%)	Environmentally conscious (22.1%)	Value for money (20.0%)	Energy saving (16.0%)	Low cost (4.1%)
Seoul	Pioneering/innovative (50.8%)	Excellent quality (48.0%)	Leading technology (45.2%)	Smart/fashionable (42.4%)	Established reputation (40.4%)	Safe/secure (33.4%)	Value for money (31.6%)	Active/growing (24.6%)	Unique and clear characteristics (23.4%)	Interesting/enjoyable (17.2%)	Energy saving (11.0%)	Environmentally conscious (10.8%)	Low cost (2.2%)
Shanghai	Established reputation (45.7%)	Leading technology (45.7%)	Safe/secure (45.3%)	Unique and clear characteristics (41.5%)	Smart/fashionable (41.4%)	Interesting/enjoyable (35.2%)	Excellent quality (33.0%)	Environmentally conscious (32.8%)	Energy saving (31.6%)	Active/growing (31.0%)	Pioneering/innovative (30.2%)	Value for money (22.6%)	Low cost (20.5%)
Beijing	Leading technology (35.7%)	Active/growing (29.7%)	Smart/fashionable (28.6%)	Established reputation (27.5%)	Unique and clear characteristics (27.4%)	Excellent quality (24.9%)	Value for money (24.4%)	Environmentally conscious (23.4%)	Pioneering/innovative (22.9%)	Interesting/enjoyable (22.2%)	Safe/secure (20.8%)	Energy saving (19.3%)	Low cost (18.6%)
Guangzhou	Leading technology (46.3%)	Established reputation (42.4%)	Safe/secure (37.0%)	Environmentally conscious (34.8%)	Energy saving (34.8%)	Smart/fashionable (33.3%)	Unique and clear characteristics (33.2%)	Active/growing (31.9%)	Interesting/enjoyable (31.9%)	Value for money (28.7%)	Excellent quality (28.4%)	Pioneering/innovative (22.1%)	Low cost (22.1%)
Singapore	Established reputation (54.7%)	Excellent quality (50.2%)	Leading technology (42.0%)	Smart/fashionable (39.8%)	Safe/secure (33.1%)	Pioneering/innovative (30.6%)	Active/growing (29.8%)	Interesting/enjoyable (27.6%)	Unique and clear characteristics (24.9%)	Value for money (21.6%)	Environmentally conscious (17.5%)	Energy saving (15.9%)	Low cost (4.9%)
Kuala Lumpur	Excellent quality (64.1%)	Established reputation (60.6%)	Leading technology (58.7%)	Safe/secure (58.1%)	Smart/fashionable (57.7%)	Active/growing (52.7%)	Pioneering/innovative (50.9%)	Energy saving (49.1%)	Unique and clear characteristics (48.8%)	Interesting/enjoyable (46.2%)	Environmentally conscious (43.9%)	Value for money (40.8%)	Low cost (12.2%)
Bangkok	Excellent quality (53.8%)	Established reputation (53.6%)	Leading technology (49.0%)	Smart/fashionable (38.1%)	Pioneering/innovative (36.9%)	Active/growing (36.0%)	Safe/secure (32.8%)	Unique and clear characteristics (30.8%)	Environmentally conscious (22.4%)	Interesting/enjoyable (22.0%)	Value for money (21.9%)	Energy saving (19.8%)	Low cost (8.3%)
Metro Manila	Excellent quality (67.4%)	Established reputation (49.3%)	Smart/fashionable (47.1%)	Pioneering/innovative (39.0%)	Leading technology (29.4%)	Active/growing (27.8%)	Value for money (19.6%)	Safe/secure (19.6%)	Unique and clear characteristics (16.1%)	Interesting/enjoyable (12.5%)	Environmentally conscious (4.6%)	Low cost (4.5%)	Energy saving (4.0%)
Jakarta	Excellent quality (55.3%)	Established reputation (50.7%)	Smart/fashionable (45.6%)	Leading technology (44.9%)	Pioneering/innovative (36.0%)	Value for money (31.7%)	Unique and clear characteristics (31.3%)	Active/growing (29.3%)	Energy saving (27.1%)	Interesting/enjoyable (26.8%)	Environmentally conscious (25.8%)	Safe/secure (25.6%)	Low cost (14.7%)
Ho Chi Minh City	Excellent quality (72.0%)	Established reputation (71.1%)	Value for money (65.9%)	Safe/secure (65.3%)	Smart/fashionable (62.4%)	Leading technology (59.8%)	Pioneering/innovative (57.6%)	Unique and clear characteristics (51.0%)	Interesting/enjoyable (47.4%)	Environmentally conscious (46.3%)	Energy saving (44.6%)	Active/growing (41.3%)	Low cost (18.5%)
Yangon	Established reputation (57.8%)	Excellent quality (56.0%)	Smart/fashionable (54.6%)	Safe/secure (39.2%)	Leading technology (37.6%)	Value for money (27.0%)	Active/growing (26.6%)	Unique and clear characteristics (24.2%)	Interesting/enjoyable (20.4%)	Pioneering/innovative (18.0%)	Environmentally conscious (11.4%)	Energy saving (7.2%)	Low cost (2.2%)
Delhi	Smart/fashionable (58.7%)	Established reputation (50.2%)	Excellent quality (48.7%)	Active/growing (45.5%)	Unique and clear characteristics (45.0%)	Pioneering/innovative (43.1%)	Interesting/enjoyable (36.2%)	Value for money (31.7%)	Safe/secure (31.5%)	Leading technology (31.0%)	Environmentally conscious (30.5%)	Energy saving (27.3%)	Low cost (23.8%)
Mumbai	Smart/fashionable (56.5%)	Excellent quality (55.4%)	Established reputation (47.3%)	Active/growing (45.0%)	Pioneering/innovative (35.2%)	Value for money (31.5%)	Unique and clear characteristics (29.0%)	Safe/secure (27.5%)	Interesting/enjoyable (27.2%)	Environmentally conscious (23.5%)	Leading technology (21.9%)	Energy saving (14.3%)	Low cost (12.2%)
Reference													
Moscow	Established reputation (49.4%)	Excellent quality (43.8%)	Leading technology (39.2%)	Smart/fashionable (35.6%)	Unique and clear characteristics (35.0%)	Pioneering/innovative (29.8%)	Interesting/enjoyable (29.0%)	Safe/secure (21.2%)	Value for money (18.8%)	Energy saving (18.8%)	Environmentally conscious (18.0%)	Active/growing (17.8%)	Low cost (3.8%)
New York (2014 survey)	Excellent quality (74.4%)	Established reputation (71.0%)	Safe/secure (70.6%)	Interesting/enjoyable (66.4%)	Smart/fashionable (64.4%)	Unique and clear characteristics (62.0%)	Environmentally conscious (61.4%)	Active/growing (59.4%)	Energy saving (59.0%)	Value for money (56.1%)	Pioneering/innovative (54.1%)	Leading technology (50.9%)	Low cost (33.2%)
Sao Paulo (2014 survey)	Excellent quality (64.9%)	Smart/fashionable (56.7%)	Established reputation (46.1%)	Unique and clear characteristics (30.5%)	Pioneering/innovative (29.3%)	Interesting/enjoyable (27.7%)	Safe/secure (27.7%)	Leading technology (25.0%)	Active/growing (23.8%)	Environmentally conscious (20.4%)	Energy saving (20.2%)	Value for money (18.6%)	Low cost (7.6%)

Chinese products

	1	2	3	4	5	6	7	8	9	10	11	12	13
15-city average	Low cost (64.9%)	Value for money (25.2%)	Active/ growing (24.9%)	Pioneering/ innovative (21.2%)	Smart/ fashionable (19.4%)	Interesting/ enjoyable (19.1%)	Unique and clear characteristics (18.8%)	Established reputation (17.8%)	Excellent quality (17.1%)	Leading technology (14.4%)	Safe/secure (13.7%)	Environmentally conscious (13.0%)	Energy saving (12.1%)
Hong Kong	Low cost (90.4%)	Value for money (20.3%)	Active/ growing (10.9%)	Pioneering/ innovative (10.5%)	Interesting/ enjoyable (4.8%)	Unique and clear characteristics (4.5%)	Energy saving (3.0%)	Established reputation (2.8%)	Leading technology (2.5%)	Safe/secure (2.3%)	Excellent quality (2.0%)	Environmentally conscious (1.8%)	Smart/ fashionable (1.0%)
Taipei	Low cost (86.6%)	Value for money (15.8%)	Interesting/ enjoyable (13.4%)	Active/ growing (8.0%)	Unique and clear characteristics (6.3%)	Pioneering/ innovative (4.3%)	Established reputation (1.8%)	Safe/secure (1.3%)	Excellent quality (0.9%)	Smart/ fashionable (0.9%)	Leading technology (0.9%)	Energy saving (0.6%)	Environmentally conscious (0.5%)
Seoul	Low cost (95.0%)	Value for money (18.4%)	Active/ growing (15.4%)	Interesting/ enjoyable (10.4%)	Unique and clear characteristics (8.4%)	Environmentally conscious (2.8%)	Established reputation (2.2%)	Leading technology (2.2%)	Pioneering/ innovative (1.6%)	Energy saving (0.6%)	Smart/ fashionable (0.4%)	Safe/secure (0.4%)	Excellent quality (0.2%)
Shanghai	Value for money (40.1%)	Active/ growing (34.2%)	Low cost (31.9%)	Pioneering/ innovative (30.4%)	Environmentally conscious (29.4%)	Excellent quality (28.3%)	Established reputation (28.3%)	Smart/ fashionable (28.1%)	Unique and clear characteristics (27.9%)	Leading technology (27.9%)	Safe/secure (27.0%)	Energy saving (26.7%)	Interesting/ enjoyable (26.2%)
Beijing	Value for money (31.7%)	Active/ growing (28.4%)	Low cost (25.4%)	Pioneering/ innovative (23.7%)	Unique and clear characteristics (23.4%)	Excellent quality (22.9%)	Smart/ fashionable (22.3%)	Environmentally conscious (21.4%)	Safe/secure (21.4%)	Interesting/ enjoyable (20.7%)	Established reputation (20.6%)	Leading technology (18.8%)	Energy saving (16.2%)
Guangzhou	Active/ growing (35.5%)	Pioneering/ innovative (34.9%)	Value for money (30.1%)	Energy saving (29.4%)	Established reputation (28.4%)	Interesting/ enjoyable (26.5%)	Excellent quality (26.0%)	Unique and clear characteristics (25.7%)	Smart/ fashionable (25.6%)	Low cost (25.5%)	Safe/secure (24.7%)	Leading technology (22.5%)	Environmentally conscious (21.1%)
Singapore	Low cost (84.1%)	Value for money (34.7%)	Active/ growing (17.3%)	Interesting/ enjoyable (8.0%)	Leading technology (6.9%)	Smart/ fashionable (6.5%)	Established reputation (6.5%)	Pioneering/ innovative (6.5%)	Unique and clear characteristics (5.3%)	Environmentally conscious (5.3%)	Safe/secure (4.3%)	Energy saving (4.3%)	Excellent quality (3.9%)
Kuala Lumpur	Low cost (68.5%)	Value for money (37.5%)	Active/ growing (27.0%)	Pioneering/ innovative (26.8%)	Interesting/ enjoyable (26.3%)	Unique and clear characteristics (23.6%)	Energy saving (20.0%)	Established reputation (18.1%)	Smart/ fashionable (18.0%)	Leading technology (17.0%)	Excellent quality (16.9%)	Safe/secure (14.4%)	Environmentally conscious (14.2%)
Bangkok	Low cost (61.4%)	Value for money (31.0%)	Pioneering/ innovative (28.4%)	Established reputation (27.4%)	Active/ growing (25.6%)	Unique and clear characteristics (24.4%)	Smart/ fashionable (21.6%)	Interesting/ enjoyable (16.8%)	Excellent quality (15.3%)	Safe/secure (12.5%)	Leading technology (11.9%)	Environmentally conscious (10.9%)	Energy saving (9.0%)
Metro Manila	Low cost (74.8%)	Smart/ fashionable (14.4%)	Value for money (12.6%)	Active/ growing (12.4%)	Excellent quality (10.0%)	Interesting/ enjoyable (8.0%)	Pioneering/ innovative (7.5%)	Unique and clear characteristics (7.3%)	Established reputation (6.0%)	Leading technology (5.6%)	Safe/secure (3.4%)	Energy saving (2.6%)	Environmentally conscious (2.4%)
Jakarta	Low cost (48.9%)	Active/ growing (43.4%)	Pioneering/ innovative (33.8%)	Smart/ fashionable (29.3%)	Unique and clear characteristics (28.1%)	Value for money (26.5%)	Excellent quality (22.0%)	Interesting/ enjoyable (22.0%)	Established reputation (18.5%)	Leading technology (16.9%)	Safe/secure (15.4%)	Environmentally conscious (14.7%)	Energy saving (13.2%)
Ho Chi Minh City	Low cost (69.9%)	Smart/ fashionable (20.1%)	Active/ growing (20.1%)	Pioneering/ innovative (19.5%)	Unique and clear characteristics (19.5%)	Interesting/ enjoyable (16.6%)	Leading technology (10.5%)	Environmentally conscious (7.8%)	Established reputation (7.1%)	Safe/secure (6.8%)	Value for money (6.4%)	Excellent quality (4.9%)	Energy saving (2.1%)
Yangon	Low cost (74.0%)	Interesting/ enjoyable (14.2%)	Smart/ fashionable (12.6%)	Leading technology (12.4%)	Value for money (11.6%)	Unique and clear characteristics (11.2%)	Pioneering/ innovative (10.2%)	Active/ growing (10.0%)	Established reputation (8.6%)	Environmentally conscious (5.8%)	Excellent quality (5.4%)	Energy saving (5.2%)	Safe/secure (4.6%)
Delhi	Low cost (78.6%)	Excellent quality (47.1%)	Established reputation (43.9%)	Active/ growing (43.0%)	Smart/ fashionable (41.5%)	Pioneering/ innovative (38.1%)	Value for money (37.5%)	Safe/secure (34.8%)	Interesting/ enjoyable (34.7%)	Leading technology (33.5%)	Unique and clear characteristics (32.5%)	Environmentally conscious (30.4%)	Energy saving (27.0%)
Mumbai	Low cost (80.0%)	Excellent quality (34.1%)	Smart/ fashionable (33.7%)	Established reputation (31.7%)	Active/ growing (29.6%)	Interesting/ enjoyable (28.3%)	Pioneering/ innovative (24.1%)	Unique and clear characteristics (22.1%)	Safe/secure (19.6%)	Value for money (18.6%)	Leading technology (17.7%)	Environmentally conscious (15.8%)	Energy saving (10.9%)
Reference													
Moscow	Low cost (82.2%)	Active/ growing (53.4%)	Value for money (34.0%)	Established reputation (33.4%)	Pioneering/ innovative (32.2%)	Unique and clear characteristics (26.4%)	Interesting/ enjoyable (24.6%)	Energy saving (18.4%)	Smart/ fashionable (15.0%)	Leading technology (13.4%)	Excellent quality (7.4%)	Environmentally conscious (7.4%)	Safe/secure (6.6%)
New York (2014 survey)	Low cost (53.3%)	Value for money (32.8%)	Leading technology (24.5%)	Established reputation (24.1%)	Active/ growing (23.3%)	Pioneering/ innovative (20.1%)	Excellent quality (19.9%)	Unique and clear characteristics (17.1%)	Interesting/ enjoyable (15.5%)	Smart/ fashionable (13.1%)	Safe/secure (9.3%)	Environmentally conscious (8.7%)	Energy saving (8.3%)
Sao Paulo (2014 survey)	Low cost (64.5%)	Active/ growing (36.3%)	Value-for-money (32.7%)	Interesting/ enjoyable (31.1%)	Smart/ fashionable (21.8%)	Established reputation (19.0%)	Pioneering/ innovative (16.0%)	Excellent quality (12.8%)	Unique and clear characteristics (11.6%)	Energy saving (11.4%)	Environmentally conscious (8.8%)	Leading technology (5.2%)	Safe/secure (4.6%)

Thai products

	1	2	3	4	5	6	7	8	9	10	11	12	13
15-city average	Low cost (42.6%)	Value for money (25.9%)	Active/ growing (23.0%)	Unique and clear characteristics (22.3%)	Interesting/ enjoyable (22.1%)	Smart/ fashionable (18.5%)	Established reputation (17.6%)	Pioneering/ innovative (17.3%)	Excellent quality (17.2%)	Safe/secure (15.3%)	Leading technology (12.4%)	Environmentally conscious (12.2%)	Energy saving (11.5%)
Hong Kong	Low cost (86.3%)	Value for money (46.8%)	Unique and clear characteristics (25.4%)	Interesting/ enjoyable (24.8%)	Active/ growing (19.1%)	Pioneering/ innovative (17.3%)	Excellent quality (8.1%)	Smart/ fashionable (7.3%)	Safe/secure (6.5%)	Established reputation (6.3%)	Environmentally conscious (4.4%)	Energy saving (4.3%)	Leading technology (1.8%)
Taipei	Low cost (69.6%)	Interesting/ enjoyable (34.9%)	Unique and clear characteristics (26.4%)	Value for money (25.3%)	Active/ growing (14.9%)	Smart/ fashionable (9.4%)	Pioneering/ innovative (7.0%)	Excellent quality (4.9%)	Established reputation (2.3%)	Safe/secure (1.5%)	Environmentally conscious (1.4%)	Energy saving (0.9%)	Leading technology (0.4%)
Seoul	Low cost (84.4%)	Unique and clear characteristics (20.8%)	Interesting/ enjoyable (16.2%)	Value for money (14.8%)	Active/ growing (5.2%)	Environmentally conscious (3.4%)	Established reputation (2.2%)	Pioneering/ innovative (1.2%)	Safe/secure (1.0%)	Energy saving (1.0%)	Excellent quality (0.8%)	Smart/ fashionable (0.4%)	Leading technology (0.2%)
Shanghai	Low cost (30.1%)	Active/ growing (23.1%)	Value for money (22.8%)	Energy saving (22.1%)	Pioneering/ innovative (21.4%)	Unique and clear characteristics (20.6%)	Interesting/ enjoyable (19.1%)	Environmentally conscious (18.9%)	Safe/secure (17.4%)	Established reputation (16.8%)	Smart/ fashionable (14.4%)	Leading technology (14.4%)	Excellent quality (13.5%)
Beijing	Low cost (27.6%)	Interesting/ enjoyable (22.1%)	Active/ growing (21.8%)	Value for money (20.9%)	Smart/ fashionable (18.0%)	Unique and clear characteristics (17.6%)	Pioneering/ innovative (17.0%)	Safe/secure (15.6%)	Established reputation (15.4%)	Energy saving (14.0%)	Leading technology (13.9%)	Environmentally conscious (12.6%)	Excellent quality (9.2%)
Guangzhou	Low cost (37.0%)	Leading technology (30.6%)	Pioneering/ innovative (29.7%)	Smart/ fashionable (28.8%)	Active/ growing (28.3%)	Established reputation (27.5%)	Unique and clear characteristics (26.2%)	Interesting/ enjoyable (25.1%)	Energy saving (20.4%)	Value for money (20.2%)	Excellent quality (18.8%)	Environmentally conscious (18.6%)	Safe/secure (18.3%)
Singapore	Low cost (70.4%)	Value for money (43.9%)	Interesting/ enjoyable (17.3%)	Unique and clear characteristics (15.5%)	Active/ growing (12.7%)	Smart/ fashionable (11.6%)	Established reputation (7.1%)	Pioneering/ innovative (6.5%)	Excellent quality (5.1%)	Environmentally conscious (4.9%)	Energy saving (4.1%)	Safe/secure (3.9%)	Leading technology (3.2%)
Kuala Lumpur	Low cost (63.0%)	Value for money (34.0%)	Interesting/ enjoyable (25.3%)	Unique and clear characteristics (22.0%)	Active/ growing (18.9%)	Pioneering/ innovative (18.3%)	Excellent quality (15.9%)	Established reputation (15.2%)	Smart/ fashionable (14.4%)	Environmentally conscious (13.9%)	Safe/secure (13.2%)	Energy saving (12.5%)	Leading technology (11.4%)
Bangkok	Value for money (45.8%)	Low cost (45.8%)	Active/ growing (42.4%)	Excellent quality (36.3%)	Established reputation (33.9%)	Safe/secure (32.8%)	Unique and clear characteristics (31.1%)	Pioneering/ innovative (29.4%)	Energy saving (28.1%)	Smart/ fashionable (26.9%)	Interesting/ enjoyable (25.5%)	Environmentally conscious (23.8%)	Leading technology (13.6%)
Metro Manila	Low cost (28.4%)	Unique and clear characteristics (14.9%)	Value for money (13.4%)	Smart/ fashionable (13.1%)	Excellent quality (13.0%)	Interesting/ enjoyable (12.4%)	Active/ growing (11.3%)	Established reputation (10.0%)	Pioneering/ innovative (6.1%)	Safe/secure (6.1%)	Environmentally conscious (3.6%)	Leading technology (2.9%)	Energy saving (1.5%)
Jakarta	Active/ growing (32.6%)	Low cost (31.2%)	Unique and clear characteristics (22.8%)	Value for money (18.0%)	Pioneering/ innovative (16.9%)	Excellent quality (16.0%)	Smart/ fashionable (15.0%)	Environmentally conscious (14.5%)	Interesting/ enjoyable (13.9%)	Leading technology (12.2%)	Energy saving (12.2%)	Safe/secure (11.5%)	Established reputation (11.4%)
Ho Chi Minh City	Active/ growing (51.0%)	Smart/ fashionable (50.8%)	Interesting/ enjoyable (43.3%)	Unique and clear characteristics (40.6%)	Excellent quality (39.8%)	Safe/secure (39.4%)	Low cost (37.3%)	Leading technology (36.5%)	Established reputation (34.3%)	Value for money (31.6%)	Pioneering/ innovative (30.0%)	Environmentally conscious (27.5%)	Energy saving (22.9%)
Yangon	Established reputation (45.0%)	Excellent quality (36.0%)	Safe/secure (35.8%)	Value for money (31.2%)	Low cost (27.6%)	Smart/ fashionable (19.8%)	Interesting/ enjoyable (18.2%)	Active/ growing (16.0%)	Leading technology (14.0%)	Unique and clear characteristics (10.4%)	Pioneering/ innovative (8.4%)	Environmentally conscious (7.0%)	Energy saving (4.6%)
Delhi	Excellent quality (26.3%)	Smart/ fashionable (25.6%)	Established reputation (24.0%)	Pioneering/ innovative (23.7%)	Active/ growing (22.4%)	Unique and clear characteristics (22.3%)	Interesting/ enjoyable (18.9%)	Value for money (17.8%)	Safe/secure (17.2%)	Leading technology (17.2%)	Low cost (16.2%)	Environmentally conscious (14.0%)	Energy saving (12.0%)
Mumbai	Pioneering/ innovative (13.9%)	Established reputation (13.4%)	Active/ growing (12.8%)	Smart/ fashionable (12.1%)	Excellent quality (11.8%)	Unique and clear characteristics (10.6%)	Interesting/ enjoyable (9.9%)	Value for money (7.6%)	Safe/secure (7.3%)	Environmentally conscious (6.6%)	Leading technology (6.5%)	Low cost (6.1%)	Energy saving (3.3%)
Reference													
Moscow	Low cost (34.8%)	Active/ growing (32.8%)	Unique and clear characteristics (19.8%)	Interesting/ enjoyable (15.2%)	Value for money (14.4%)	Established reputation (13.4%)	Pioneering/ innovative (12.8%)	Smart/ fashionable (11.2%)	Energy saving (7.2%)	Environmentally conscious (6.8%)	Leading technology (6.8%)	Safe/secure (6.4%)	Excellent quality (5.0%)

Indian Products (Indian data)

	1	2	3	4	5	6	7	8	9	10	11	12	13
Delhi	Excellent quality (94.6%)	Low cost (86.3%)	Active/ growing (84.2%)	Smart/ fashionable (83.3%)	Leading technology (83.0%)	Established reputation (82.5%)	Safe/secure (81.4%)	Energy saving (80.6%)	Value for money (79.9%)	Pioneering/ innovative (78.8%)	Unique and clear characteristics (77.6%)	Environmentally conscious (77.5%)	Interesting/ enjoyable (75.6%)
Mumbai	Excellent quality (92.2%)	Established reputation (84.0%)	Smart/ fashionable (83.2%)	Active/ growing (82.6%)	Safe/secure (81.5%)	Pioneering/ innovative (81.0%)	Value for money (80.9%)	Unique and clear characteristics (80.0%)	Interesting/ enjoyable (78.4%)	Low cost (76.2%)	Leading technology (75.7%)	Environmentally conscious (73.0%)	Energy saving (66.5%)

Korean products

	1	2	3	4	5	6	7	8	9	10	11	12	13
15-city average	Smart/fashionable (46.0%)	Active/growing (38.4%)	Excellent quality (31.1%)	Pioneering/innovative (30.8%)	Unique and clear characteristics (30.3%)	Interesting/enjoyable (29.8%)	Value for money (29.0%)	Established reputation (28.8%)	Safe/secure (25.5%)	Leading technology (24.8%)	Low cost (23.7%)	Environmentally conscious (18.8%)	Energy saving (16.0%)
Hong Kong	Smart/fashionable (72.3%)	Active/growing (63.0%)	Pioneering/innovative (56.8%)	Low cost (48.6%)	Value for money (44.9%)	Unique and clear characteristics (36.5%)	Established reputation (34.9%)	Safe/secure (34.6%)	Leading technology (34.0%)	Excellent quality (33.9%)	Interesting/enjoyable (32.9%)	Environmentally conscious (10.9%)	Energy saving (10.3%)
Taipei	Smart/fashionable (70.6%)	Active/growing (39.0%)	Pioneering/innovative (35.3%)	Unique and clear characteristics (31.3%)	Interesting/enjoyable (29.9%)	Low cost (26.1%)	Leading technology (21.3%)	Excellent quality (19.9%)	Value for money (19.5%)	Established reputation (13.5%)	Safe/secure (8.0%)	Environmentally conscious (2.5%)	Energy saving (2.5%)
Seoul	Value for money (49.4%)	Excellent quality (45.8%)	Safe/secure (37.2%)	Active/growing (34.2%)	Smart/fashionable (34.0%)	Leading technology (33.4%)	Established reputation (13.8%)	Low cost (13.4%)	Unique and clear characteristics (12.8%)	Interesting/enjoyable (12.4%)	Pioneering/innovative (12.0%)	Energy saving (8.0%)	Environmentally conscious (6.0%)
Shanghai	Smart/fashionable (42.3%)	Active/growing (38.8%)	Value for money (36.8%)	Established reputation (34.2%)	Pioneering/innovative (34.1%)	Safe/secure (33.7%)	Unique and clear characteristics (33.3%)	Interesting/enjoyable (33.0%)	Environmentally conscious (28.1%)	Excellent quality (28.0%)	Leading technology (26.2%)	Energy saving (23.7%)	Low cost (22.1%)
Beijing	Established reputation (27.5%)	Active/growing (27.5%)	Smart/fashionable (26.0%)	Pioneering/innovative (25.0%)	Interesting/enjoyable (25.0%)	Low cost (24.8%)	Value for money (23.3%)	Safe/secure (22.6%)	Unique and clear characteristics (21.9%)	Environmentally conscious (20.6%)	Excellent quality (20.2%)	Leading technology (18.6%)	Energy saving (16.9%)
Guangzhou	Value for money (39.6%)	Smart/fashionable (39.1%)	Environmentally conscious (37.9%)	Active/growing (37.3%)	Unique and clear characteristics (35.0%)	Pioneering/innovative (34.0%)	Energy saving (33.5%)	Safe/secure (33.0%)	Interesting/enjoyable (32.4%)	Leading technology (32.4%)	Established reputation (31.7%)	Excellent quality (29.6%)	Low cost (20.1%)
Singapore	Smart/fashionable (58.4%)	Active/growing (47.8%)	Excellent quality (39.8%)	Interesting/enjoyable (36.3%)	Established reputation (35.9%)	Value for money (35.9%)	Unique and clear characteristics (34.1%)	Leading technology (31.2%)	Pioneering/innovative (24.9%)	Safe/secure (18.0%)	Environmentally conscious (16.1%)	Energy saving (12.2%)	Low cost (11.4%)
Kuala Lumpur	Smart/fashionable (59.4%)	Active/growing (50.6%)	Excellent quality (50.1%)	Interesting/enjoyable (50.1%)	Unique and clear characteristics (49.0%)	Pioneering/innovative (45.5%)	Safe/secure (45.0%)	Leading technology (42.9%)	Established reputation (42.7%)	Environmentally conscious (38.6%)	Energy saving (37.5%)	Value for money (32.8%)	Low cost (23.1%)
Bangkok	Smart/fashionable (45.1%)	Active/growing (38.3%)	Unique and clear characteristics (33.8%)	Pioneering/innovative (33.5%)	Established reputation (31.4%)	Excellent quality (28.8%)	Interesting/enjoyable (27.9%)	Leading technology (22.9%)	Value-for-money (22.0%)	Safe/secure (21.5%)	Environmentally conscious (18.1%)	Low cost (16.8%)	Energy saving (14.8%)
Metro Manila	Smart/fashionable (39.9%)	Low cost (29.9%)	Active/growing (27.6%)	Excellent quality (20.5%)	Interesting/enjoyable (19.3%)	Pioneering/innovative (15.3%)	Value for money (15.1%)	Unique and clear characteristics (14.3%)	Established reputation (13.9%)	Safe/secure (8.0%)	Leading technology (7.9%)	Environmentally conscious (4.6%)	Energy saving (2.5%)
Jakarta	Active/growing (43.3%)	Smart/fashionable (37.1%)	Unique and clear characteristics (34.2%)	Pioneering/innovative (31.1%)	Low cost (30.7%)	Value for money (28.3%)	Excellent quality (28.2%)	Interesting/enjoyable (25.7%)	Established reputation (23.8%)	Leading technology (19.4%)	Safe/secure (15.6%)	Environmentally conscious (15.0%)	Energy saving (13.1%)
Ho Chi Minh City	Smart/fashionable (66.4%)	Safe/secure (52.6%)	Interesting/enjoyable (50.6%)	Active/growing (49.9%)	Unique and clear characteristics (47.0%)	Excellent quality (45.0%)	Value for money (43.8%)	Established reputation (42.1%)	Pioneering/innovative (41.8%)	Leading technology (38.6%)	Environmentally conscious (34.4%)	Low cost (33.5%)	Energy saving (28.6%)
Yangon	Smart/fashionable (54.4%)	Established reputation (39.2%)	Excellent quality (29.2%)	Active/growing (28.0%)	Interesting/enjoyable (28.0%)	Value for money (19.8%)	Safe/secure (19.8%)	Unique and clear characteristics (17.4%)	Leading technology (11.6%)	Pioneering/innovative (11.0%)	Environmentally conscious (10.8%)	Low cost (9.0%)	Energy saving (3.8%)
Delhi	Excellent quality (38.1%)	Smart/fashionable (35.7%)	Established reputation (33.3%)	Active/growing (33.2%)	Pioneering/innovative (29.5%)	Unique and clear characteristics (29.2%)	Interesting/enjoyable (26.2%)	Low cost (25.5%)	Leading technology (23.5%)	Safe/secure (22.4%)	Value for money (21.9%)	Environmentally conscious (19.4%)	Energy saving (18.4%)
Mumbai	Excellent quality (17.1%)	Active/growing (16.8%)	Pioneering/innovative (15.7%)	Established reputation (15.1%)	Unique and clear characteristics (14.7%)	Smart/fashionable (14.2%)	Interesting/enjoyable (13.5%)	Safe/secure (10.3%)	Value for money (9.7%)	Environmentally conscious (9.7%)	Leading technology (8.6%)	Low cost (7.0%)	Energy saving (5.0%)

Reference

Moscow	Active/growing (48.4%)	Pioneering/innovative (39.6%)	Value for money (38.4%)	Leading technology (33.2%)	Established reputation (31.8%)	Interesting/enjoyable (28.0%)	Unique and clear characteristics (26.8%)	Low cost (26.8%)	Energy saving (25.8%)	Excellent quality (24.4%)	Smart/fashionable (20.6%)	Safe/secure (20.2%)	Environmentally conscious (19.0%)
New York (2014 survey)	Low cost (31.0%)	Value for money (20.1%)	Active/growing (16.9%)	Excellent quality (16.5%)	Pioneering/innovative (16.3%)	Leading technology (14.3%)	Unique and clear characteristics (13.3%)	Established reputation (11.9%)	Interesting/enjoyable (10.9%)	Smart/fashionable (9.5%)	Safe/secure (8.7%)	Environmentally conscious (7.0%)	Energy saving (5.4%)
Sao Paulo (2014 survey)	Low cost (53.3%)	Value for money (32.5%)	Active/growing (31.5%)	Interesting/enjoyable (26.3%)	Smart/fashionable (23.2%)	Established reputation (18.6%)	Pioneering/innovative (15.6%)	Excellent quality (15.2%)	Energy saving (13.2%)	Unique and clear characteristics (12.0%)	Environmentally conscious (8.2%)	Leading technology (5.2%)	Safe/secure (3.6%)

2. Goods, services and entertainment associated with various countries

Next, let's look at the goods, services and entertainment associated with various countries. The table below shows the 15-city average scores.

- In items associated with Japan, Household appliances and audio/visual devices, Digital products and Private cars make up the top 3, followed by Anime/manga/cartoons/comics, Food and Sightseeing. In the city by city results, durable consumer goods make up the top 3 in most cities, but Anime/manga/cartoons/comics comes in at No. 1 in Seoul. In Ho Chi Minh City, Medical care appears in the top 5.
- In items associated with the US, Digital products, Household appliances and audio/visual devices and Private cars rank high, as they do in Japan, and Movies appears in the top 3.
- In items associated with Korea, Fashion products (apparel), Digital products and Cosmetics make up the top 3, followed by Household appliances and audio/visual devices at No. 4.
- In items associated with China, Food is No. 1 and Sightseeing No. 2, and Digital products and Household appliances and audio/visual devices are also in the top 5.
- In items associated with Thailand, Sightseeing is No. 1 and Food No. 2, while Household appliances and audio/visual devices and Digital products do not appear in the top 5.

■ Goods, services and entertainment associated with various countries: 15-city average

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Goods, services, etc. associated with Japan	Household appliances and audio/visual devices (72.7%)	Digital products (66.3%)	Private cars (57.9%)	Animation/ manga/ cartoons/ comics (52.5%)	Food (46.6%)	Sightseeing (43.4%)	Fashion products (apparel) (39.9%)	Cosmetics (36.2%)	Luxury brands (34.2%)	Movies (27.1%)	Medical care (26.5%)	Sports (25.4%)	Music (25.3%)	Furniture and interior goods (25.0%)
Goods, services, etc. associated with the US	Digital products (48.0%)	Household appliances and audio/visual devices (47.7%)	Movies (47.3%)	Private cars (45.8%)	Luxury brands (44.1%)	Music (39.9%)	Sports (38.9%)	Sightseeing (37.3%)	Fashion products (apparel) (36.6%)	Medical care (33.4%)	Food (30.3%)	Cosmetics (26.5%)	Animation/ manga/ cartoons/ comics (25.5%)	Furniture and interior goods (24.4%)
Goods, services, etc. associated with Korea	Fashion products (apparel) (44.3%)	Digital products (43.7%)	Cosmetics (40.0%)	Household appliances and audio/visual devices (37.4%)	Sightseeing (35.4%)	Food (35.0%)	Movies (33.9%)	Music (33.1%)	Private cars (29.1%)	Luxury brands (22.3%)	Medical care (20.5%)	Sports (19.1%)	Furniture and interior goods (17.8%)	Animation/ manga/ cartoons/ comics (14.7%)
Goods, services, etc. associated with China	Food (46.3%)	Sightseeing (40.7%)	Digital products (39.0%)	Movies (32.2%)	Household appliances and audio/visual devices (31.6%)	Sports (30.0%)	Furniture and interior goods (27.9%)	Fashion products (apparel) (26.2%)	Music (22.9%)	Animation/ manga/ cartoons/ comics (19.7%)	Private cars (19.1%)	Cosmetics (18.4%)	Medical care (18.1%)	Luxury brands (16.2%)
Goods, services, etc. associated with Thailand	Sightseeing (44.8%)	Food (37.8%)	Fashion products (apparel) (21.8%)	Movies (19.8%)	Furniture and interior goods (18.2%)	Music (16.6%)	Sports (16.5%)	Household appliances and audio/visual devices (15.4%)	Digital products (14.1%)	Medical care (13.4%)	Cosmetics (12.5%)	Luxury brands (11.9%)	Private cars (9.9%)	Animation/ manga/ cartoons/ comics (9.7%)

3. Goods, services and entertainment associated with Japan

In the 15-city average, the top 5 goods, services and entertainment associated with Japan are Household appliances and audio/visual devices, Digital products, Private cars, Anime/manga/cartoons/comics and Food. In city by city results, durable consumer goods are No. 1 in most cities, but Anime/manga/cartoons/comics comes in at No. 1 in Seoul. In Ho Chi Minh City, Medical care appears in the top 5. In Yangon, Delhi and Mumbai, Food, Sightseeing, Anime/manga/ cartoons/comics and other soft content do not appear in the top 5.

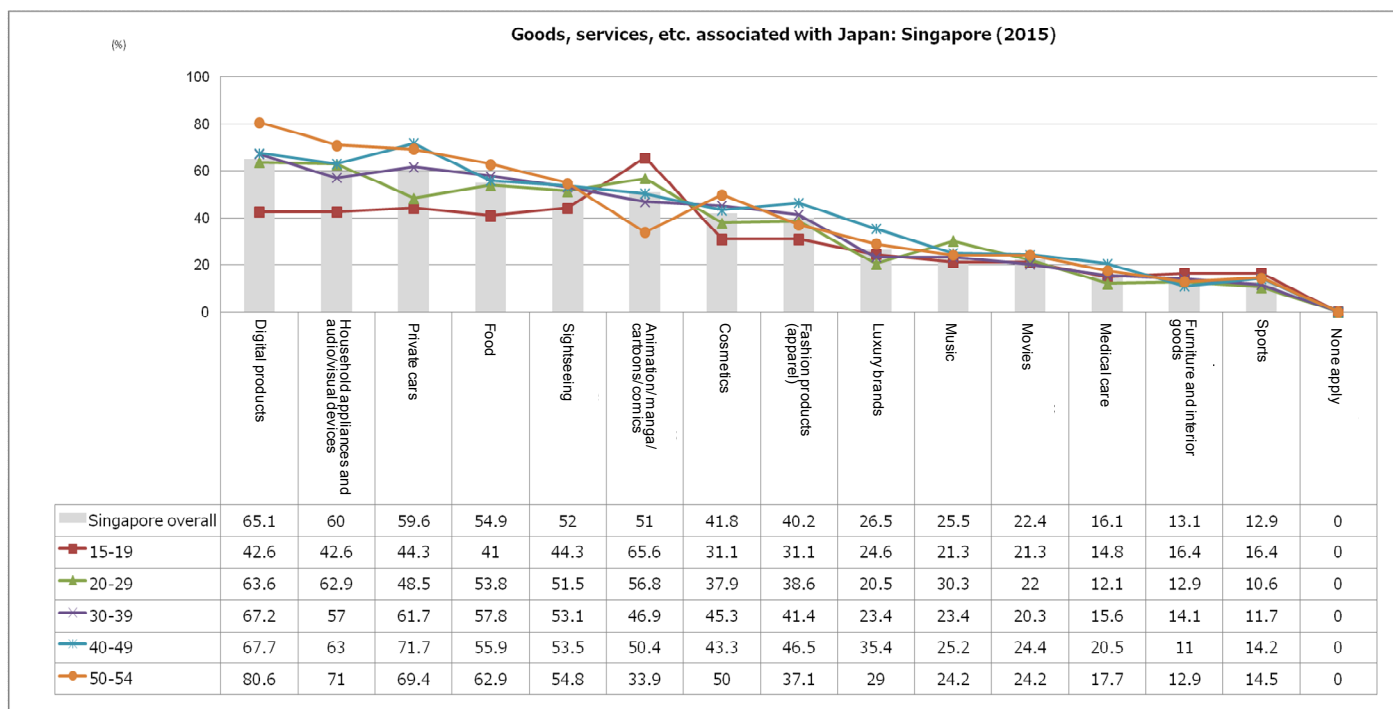
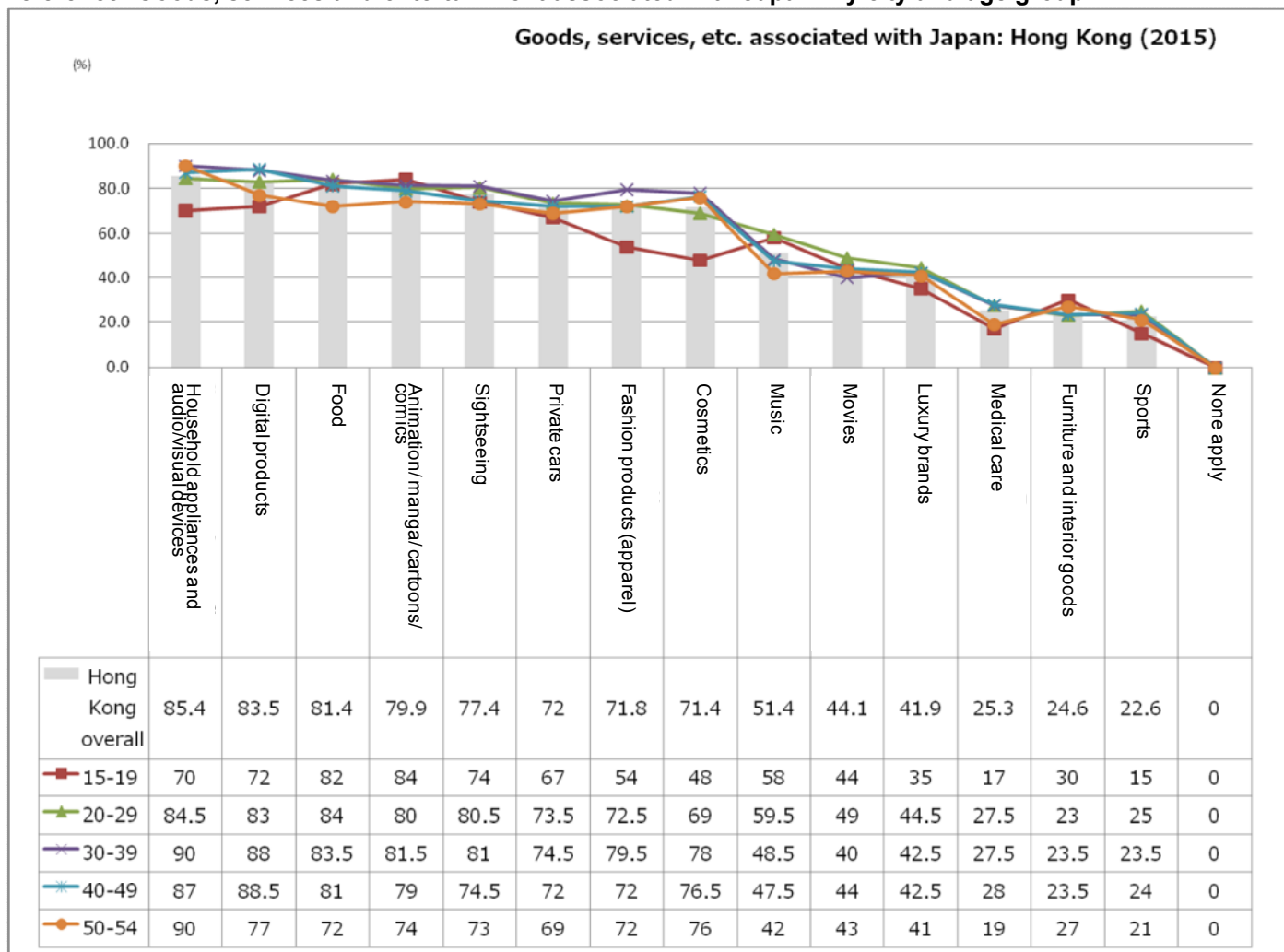
Moreover, there are differences in trends between age groups in different cities. For instance, in Hong Kong the overall scores for Household appliances and audio/visual devices and Digital products are over 80%, but among the teenage cohort, the scores are around 70%. The overall scores for Fashion products (apparel) and Cosmetics are around 70%, but among those aged 14–19, they are only around 50%. In Singapore, there are many categories where there are significant differences between age groups. The score for Anime/manga/cartoons/comics for those aged 14–19 sticks out above the others, but in other categories scores for this age group are below those for Singapore overall, while the scores for durable goods, Food and Cosmetics for those in their 50s are higher than the overall scores. In this way, there are categories in some cities in which Japanese products' hold on young people seems to be waning.

■ Goods, services and entertainment associated with Japan

Q. What types of goods, services and entertainment do you associate with Japan? (Multiple response; 14 options)

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
15-city average	Household appliances and audio/visual devices (72.7%)	Digital products (66.3%)	Private cars (57.9%)	Animation/ manga/ cartoons/ comics (52.5%)	Food (46.6%)	Sightseeing (43.4%)	Fashion products (apparel) (39.9%)	Cosmetics (36.2%)	Luxury brands (34.2%)	Movies (27.1%)	Medical care (26.5%)	Sports (25.4%)	Music (25.3%)	Furniture and interior goods (25.0%)
Hong Kong	Household appliances and audio/visual devices (85.4%)	Digital products (83.5%)	Food (81.4%)	Animation/ manga/ cartoons/ comics (79.9%)	Sightseeing (77.4%)	Private cars (72.0%)	Fashion products (apparel) (71.8%)	Cosmetics (71.4%)	Music (51.4%)	Movies (44.1%)	Luxury brands (41.9%)	Medical care (25.3%)	Furniture and interior goods (24.6%)	Sports (22.6%)
Taipei	Household appliances and audio/visual devices (87.5%)	Digital products (82.1%)	Sightseeing (78.3%)	Food (73.8%)	Animation/ manga/ cartoons/ comics (67.3%)	Fashion products (apparel) (61.8%)	Cosmetics (56.9%)	Private cars (47.6%)	Music (46.3%)	Movies (37.6%)	Medical care (31.4%)	Sports (19.9%)	Luxury brands (19.8%)	Furniture and interior goods (18.8%)
Seoul	Animation/ manga/ cartoons/ comics (73.8%)	Household appliances and audio/visual devices (73.0%)	Digital products (59.0%)	Sightseeing (49.0%)	Food (46.6%)	Private cars (33.2%)	Fashion products (apparel) (20.6%)	Cosmetics (17.8%)	Music (17.4%)	Movies (15.8%)	Furniture and interior goods (14.6%)	Sports (9.0%)	Luxury brands (7.6%)	Medical care (5.8%)
Shanghai	Household appliances and audio/visual devices (83.6%)	Digital products (75.4%)	Animation/ manga/ cartoons/ comics (61.7%)	Private cars (60.4%)	Sightseeing (48.1%)	Cosmetics (40.2%)	Food (39.8%)	Fashion products (apparel) (36.8%)	Medical care (36.4%)	Luxury brands (33.5%)	Music (25.8%)	Movies (25.7%)	Sports (21.2%)	Furniture and interior goods (21.1%)
Beijing	Digital products (58.0%)	Household appliances and audio/visual devices (54.8%)	Private cars (45.5%)	Animation/ manga/ cartoons/ comics (44.1%)	Sightseeing (29.5%)	Fashion products (apparel) (24.7%)	Food (24.4%)	Sports (22.2%)	Furniture and interior goods (22.1%)	Luxury brands (20.7%)	Movies (19.1%)	Music (18.8%)	Medical care (17.8%)	Cosmetics (17.5%)
Guangzhou	Household appliances and audio/visual devices (51.8%)	Digital products (50.9%)	Animation/ manga/ cartoons/ comics (43.9%)	Food (43.0%)	Sightseeing (42.6%)	Cosmetics (41.4%)	Private cars (40.2%)	Fashion products (apparel) (39.9%)	Medical care (38.0%)	Movies (33.8%)	Sports (33.3%)	Luxury brands (32.7%)	Furniture and interior goods (31.8%)	Music (30.4%)
Singapore	Digital products (65.1%)	Household appliances and audio/visual devices (60.0%)	Private cars (59.6%)	Food (54.9%)	Sightseeing (52.0%)	Animation/ manga/ cartoons/ comics (51.0%)	Cosmetics (41.8%)	Fashion products (apparel) (40.2%)	Luxury brands (26.5%)	Music (25.5%)	Movies (22.4%)	Medical care (16.1%)	Furniture and interior goods (13.1%)	Sports (12.9%)
Kuala Lumpur	Private cars (69.7%)	Household appliances and audio/visual devices (68.9%)	Animation/ manga/ cartoons/ comics (67.4%)	Digital products (65.0%)	Sightseeing (60.1%)	Food (57.7%)	Cosmetics (50.6%)	Medical care (47.4%)	Fashion products (apparel) (46.8%)	Luxury brands (46.5%)	Furniture and interior goods (45.5%)	Movies (41.1%)	Sports (39.6%)	Music (36.7%)
Bangkok	Household appliances and audio/visual devices (74.0%)	Private cars (65.5%)	Food (60.8%)	Digital products (57.0%)	Sightseeing (51.9%)	Animation/ manga/ cartoons/ comics (51.1%)	Fashion products (apparel) (48.9%)	Cosmetics (45.3%)	Luxury brands (33.1%)	Sports (30.0%)	Movies (28.9%)	Music (28.8%)	Furniture and interior goods (26.9%)	Medical care (25.4%)
Metro Manila	Household appliances and audio/visual devices (76.3%)	Digital products (70.0%)	Food (48.4%)	Animation/ manga/ cartoons/ comics (43.1%)	Private cars (41.8%)	Fashion products (apparel) (29.3%)	Sightseeing (24.9%)	Luxury brands (24.9%)	Cosmetics (20.3%)	Furniture and interior goods (18.1%)	Movies (13.0%)	Medical care (11.4%)	Sports (7.4%)	Music (6.1%)
Jakarta	Private cars (72.0%)	Household appliances and audio/visual devices (67.5%)	Animation/ manga/ cartoons/ comics (55.7%)	Digital products (52.4%)	Food (49.4%)	Movies (30.1%)	Sightseeing (29.7%)	Luxury brands (27.8%)	Cosmetics (27.5%)	Fashion products (apparel) (27.3%)	Medical care (25.6%)	Sports (22.7%)	Furniture and interior goods (22.6%)	Music (17.5%)
Ho Chi Minh City	Digital products (89.3%)	Household appliances and audio/visual devices (88.5%)	Private cars (72.3%)	Animation/ manga/ cartoons/ comics (57.0%)	Medical care (47.5%)	Food (44.3%)	Sightseeing (43.3%)	Luxury brands (42.9%)	Cosmetics (34.9%)	Movies (27.1%)	Furniture and interior goods (25.9%)	Fashion products (apparel) (25.6%)	Sports (20.0%)	Music (19.0%)
Yangon	Private cars (82.0%)	Household appliances and audio/visual devices (68.4%)	Digital products (52.4%)	Luxury brands (29.2%)	Furniture and interior goods (18.6%)	Movies (15.2%)	Fashion products (apparel) (14.2%)	Food (13.8%)	Sightseeing (13.0%)	Animation/ manga/ cartoons/ comics (11.6%)	Cosmetics (11.6%)	Sports (6.2%)	Medical care (6.2%)	Music (4.6%)
Delhi	Household appliances and audio/visual devices (79.9%)	Digital products (66.1%)	Private cars (59.6%)	Luxury brands (49.1%)	Fashion products (apparel) (39.5%)	Sports (37.1%)	Furniture and interior goods (34.7%)	Cosmetics (31.1%)	Sightseeing (29.4%)	Animation/ manga/ cartoons/ comics (28.3%)	Medical care (27.0%)	Food (25.9%)	Music (20.5%)	Movies (16.4%)
Mumbai	Household appliances and audio/visual devices (64.9%)	Luxury brands (60.6%)	Digital products (60.1%)	Sports (56.4%)	Fashion products (apparel) (53.9%)	Private cars (47.3%)	Animation/ manga/ cartoons/ comics (44.7%)	Food (27.6%)	Movies (26.4%)	Furniture and interior goods (25.8%)	Cosmetics (21.9%)	Music (20.1%)	Medical care (17.3%)	Sightseeing (17.2%)
Reference														
Moscow	Digital products (74.8%)	Household appliances and audio/visual devices (73.2%)	Private cars (69.0%)	Animation/ manga/ cartoons/ comics (62.8%)	Sightseeing (56.0%)	Food (55.4%)	Luxury brands (49.8%)	Medical care (30.6%)	Sports (24.8%)	Cosmetics (23.2%)	Movies (17.2%)	Furniture and interior goods (16.2%)	Fashion products (apparel) (13.6%)	Music (10.4%)
New York (2014 survey)	Animation/ manga/ cartoons/ comics (56.1%)	Digital products (53.3%)	Household appliances and audio/visual devices (50.5%)	Private cars (44.1%)	Food (35.6%)	Sightseeing (33.0%)	Luxury brands (18.3%)	Sports (17.5%)	Movies (14.1%)	Fashion products (apparel) (12.7%)	Furniture and interior goods (12.3%)	Music (12.1%)	Cosmetics (11.5%)	Medical care (9.9%)
Sao Paulo (2014 survey)	Digital products (83.6%)	Household appliances and audio/visual devices (74.5%)	Animation/ manga/ cartoons/ comics (46.1%)	Private cars (40.9%)	Luxury brands (30.5%)	Sightseeing (25.1%)	Food (21.6%)	Furniture and interior goods (18.2%)	Fashion products (apparel) (17.2%)	Movies (14.6%)	Sports (14.2%)	Medical care (8.0%)	Cosmetics (7.2%)	Music (6.2%)

Reference: Goods, services and entertainment associated with Japan: By city and age group



Overview of survey data used in this report

Cities surveyed: 15 Asian cities

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

Reference: Moscow, New York, Sao Paulo (2014 survey)

Respondents: Males and females aged 15–54

Sample size: 11,204

Survey period: Early May–mid-August 2015

Global HABIT®

Hakuhodo Audience and Brand-User's index for Targeting

Global HABIT is a comprehensive Hakuhodo survey conducted in major cities in Asia and around the world 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 the most recent Global HABIT 2015 survey

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

* Dalian, Shenyang, Wuhan, Chengdu, Hangzhou, Ningbo, Xian, Fuzhou (China); Sydney (Australia); Frankfurt, Berlin, Frankfurt (Germany); Paris (France); Milan (Italy); Madrid (Spain); London (UK); Los Angeles, Chicago, New York (USA) and Sao Paulo (Brazil) surveyed in 2014 or earlier.

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

Note: In Shanghai, Beijing and Guangzhou, an additional 1,500 male and female Chinese power *sei-katsu-sha* aged 25–54 with monthly household 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 or higher 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: Early May–mid-August 2015

Survey method: In-home interviews (except Hong Kong, Taipei, Seoul, Singapore, Kuala Lumpur)
Individual interviews at a central location (Hong Kong, Taipei, Seoul, Singapore, Kuala Lumpur)

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, travel, housing

Product & service usage

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

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