



News

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Survey of the Image of Japanese Products in 14 Emerging Markets around the World

- **Japanese products receive far and away the No. 1 overall rating in the 14 cities**
- **Top 5 Japanese products thought to be good quality: Digital cameras, white goods, large-sized flatscreen TVs, passenger cars and mobile phones**
- **Top 5 things associated with Japan: Consumer electronics& audio/visual devices, passenger cars, digital products (computers, mobile phones, digital cameras), animation/*manga*, sightseeing**

Tokyo—January 20, 2009—Amidst what has been described as the worst economic crisis in a century, there is renewed concern about Japan’s true value as a technological and manufacturing powerhouse. To explore this further, we analyzed original Hakuhodo survey data to find out how Japanese products are perceived by the *sei-katsu-sha*¹ of the world.

Each year since 2000, Hakuhodo has undertaken a massive survey of *sei-katsu-sha* around the world to gain data for marketing in international markets. Called Global HABIT, our survey covers around 20,000 people aged 15–54 in 33 major cities across Asia, Europe and the US.

Using data from the 2008 Global HABIT survey, we analyzed perceptions of Japanese products in 14 cities in countries and regions that are in the spotlight as emerging markets: Beijing, Shanghai (China); Hong Kong; Taipei (Taiwan); Seoul (Korea); Singapore; Bangkok (Thailand); Jakarta (Indonesia); Kuala Lumpur (Malaysia); Metro Manila (Philippines); Ho Chi Minh City (Vietnam); Delhi, Mumbai (India); Moscow (Russia).

Key findings

- 1. In the 14 cities, Japanese products received far and away the top overall rating of products from various countries.** Japanese goods were around 9 points higher than

¹ *Sei-katsu-sha* are more than simply consumers, just as people’s lives and lifestyles include more than just shopping. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers’ lives.

those of No. 2, Europe.

- Looking at individual survey items, although Korean products were No. 1 in having a growing image, Japanese products came out on top in excellent quality, having a smart, fashionable image, having unique and clear characteristics, feeling interesting/enjoyable and being good value for money.
- Compared with American, European, Korean and Chinese products, Japanese products clearly have an extremely good image in emerging markets.

2. Digital cameras drive the image of Japanese products

The top categories that respondents think Japanese products are of good quality were digital cameras, white goods, large-sized flatscreen TVs, passenger cars and mobile phones, in that order. The scores for No. 1, digital cameras, and No. 2, white goods, were particularly high in Vietnam and Taiwan.

3. Aside from products, content is now increasingly something that people associate with Japan

The top 5 goods, services and entertainment associated with Japan were household appliances and audio/visual devices at No. 1, followed by passenger cars, digital products (computers, mobile phones and digital cameras), animation/*manga*, and sightseeing, in that order. The scores for No. 1, household appliances and audio/visual devices, were especially high in Vietnam and Taiwan, while those for No. 2, passenger cars, were particularly high in Malaysia and Taiwan.

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Details of analysis

1. Product country of origin image

Overall image rating

- **Japanese products came out tops in overall product country of origin image rating in the 14 cities analyzed**, almost 9 points ahead of No. 2, European products.
- In terms of having a growing image, Korean products were No. 1, ahead of Japanese products, but in excellent quality, having a smart/fashionable image, having unique and clear characteristics, feeling interesting/enjoyable and being value for money, Japanese products were No. 1, indicative of the height of the presence of Japanese products in emerging markets.

Overall product country of origin rating (Average rating across the 14 cities analyzed) (%)

	Japanese products	European products	American products	Korean products	Chinese products
6-item average	(1) 43.0	(2) 34.3	(3) 33.4	30.4	21.2
Excellent quality	(1) 70.0	(2) 46.9	(3) 41.7	26.7	17.9
Smart/fashionable image	(1) 43.6	(3) 39.6	(2) 41.3	35.3	17.5
Unique & clear characteristics	(1) 39.7	(2) 35.3	(3) 33.6	23.5	16.3
Interesting/enjoyable	(1) 35.0	(2) 27.4	(3) 26.6	25.8	17.9
Growing image	(2) 35.5	31.4	(3) 31.6	(1) 41.5	(3) 31.6
Value for money	(1) 34.1	25.4	25.3	(2) 29.3	(3) 26.0

Note: Top 3 in each item shown in parenthesis

Product country of origin images of each survey item

- **Among the product countries of origin analyzed (Japanese, American, European, Korean and Chinese), Japanese was the most named as being of excellent quality (70.0%). This score was much higher than that for European products (46.9%) at No. 2.**
- When we asked which country's products are excellent quality, Japanese products (70.0%) came out at No 1, well ahead of European products (46.9%), American products (41.7%), Korean products (26.7%) and Chinese products (17.9%).
- Japanese products were also by far the No. 1 choice in each city analyzed. Trust in the quality of Japanese products seems to be unassailable.

Are excellent quality

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(1) 70.0	(2) 46.9	(3) 41.7	26.7	17.9
China: Shanghai	(1) 56.1	(3) 31.9	31.2	31.4	(2) 33.9
China: Beijing	(1) 54.7	(3) 27.6	22.9	25.1	(2) 35.7
Hong Kong	(1) 82.9	(2) 70.0	(3) 51.6	26.3	3.6
Taiwan: Taipei	(1) 92.1	(2) 70.3	(3) 44.3	17.4	1.0
Korea: Seoul	(1) 72.4	42.6	(3) 44.6	(2) 54.0	1.2
Singapore	(1) 65.1	(3) 47.2	(2) 51.6	25.4	7.5
Thailand: Bangkok	(1) 55.6	(3) 48.0	(2) 51.2	18.5	16.0
Indonesia: Jakarta	(1) 74.8	(3) 37.0	(2) 38.3	18.6	17.1
Malaysia: Kuala Lumpur	(1) 79.5	(2) 59.1	(3) 54.5	29.8	18.4
Philippines: Manila	(1) 66.8	(3) 38.4	(2) 60.6	18.8	13.0
Vietnam: Ho Chi Minh City	(1) 82.8	(2) 48.9	(3) 38.6	24.3	12.3
India: Delhi	(1) 62.9	(2) 50.9	37.5	39.9	(3) 47.4
India: Mumbai	(1) 60.5	(3) 35.1	32.2	32.7	(2) 41.8
Russia: Moscow	(1) 73.4	(2) 50.0	(3) 24.8	11.8	1.9

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(1) 86.3	(2) 38.4	(3) 9.9	0.9	0.1
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• **Japanese products (43.6%) received the highest score in *having a smart/fashionable image*. But they had close competition from American products (41.3%), at No. 2.**

- When we asked which country's products have a smart/fashionable image, Japanese products (43.6%) were top, followed by American products (41.3%), European products (39.6%), Korean products (35.3%) and Chinese products (17.5%). Japanese products were closely rivaled by the No. 2, American products.
- However, Japanese products were beaten by American, European, Korean and Chinese products in Delhi, and by American, Korean and Chinese products in Mumbai. So, while Japanese products were tops for smart/fashionable image overall, it may be something they need to work on a little, particularly in India (Delhi, Mumbai).

Have a smart/fashionable image

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(1) 43.6	(3) 39.6	(2) 41.3	35.3	17.5
China: Shanghai	33.4	(3) 35.3	(1) 36.6	(2) 35.4	19.8
China: Beijing	(2) 36.7	28.9	(3) 33.7	(1) 48.5	24.1
Hong Kong	(1) 70.8	(3) 36.4	26.3	(2) 42.4	2.8
Taiwan: Taipei	(1) 72.1	(2) 66.4	(3) 52.5	46.4	0.4
Korea: Seoul	(2) 53.8	(1) 61.0	(3) 41.0	32.4	1.6
Singapore	(1) 42.0	(3) 36.2	(2) 37.0	26.6	10.2
Thailand: Bangkok	(1) 40.3	29.9	(3) 30.9	(2) 39.5	13.4
Indonesia: Jakarta	(1) 34.3	(3) 24.3	(2) 27.3	19.4	23.3
Malaysia: Kuala Lumpur	(3) 44.0	(2) 46.1	(1) 53.1	35.3	19.8
Philippines: Manila	(3) 34.8	(2) 40.6	(1) 41.6	28.8	22.0
Vietnam: Ho Chi Minh City	(2) 56.8	44.6	(1) 64.2	(3) 56.6	24.5
India: Delhi	25.4	29.8	(1) 43.7	(2) 36.7	(3) 34.6
India: Mumbai	37.5	32.3	(1) 50.5	(3) 38.6	(2) 46.3
Russia: Moscow	(3) 28.1	(1) 43.2	(2) 39.9	7.8	1.9

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(3) 24.6	(1) 68.6	(2) 46.1	0.9	0.3
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• **Japanese products (39.7%) were given the highest score for having *unique and clear characteristics*. This was 4.4 points higher than 2nd place getter, European products (35.3%)**

- The product country of origin most cited for having unique and clear characteristics was Japanese (39.7%), followed by European (35.3%), American (33.6%), Korean (23.5%) and Chinese (16.3%). Although the difference between Japanese products and European products at No. 2 was not great, we found evidence contravening the accepted notion that Japanese products are lacking in personality: in fact, in emerging markets, they are on an equal footing with European products as far as personality goes.
- However, in Beijing, the scores for American, European and Chinese products were higher than that of Japanese products, indicating that it may be necessary to promote product personality more in that market.

Have unique and clear characteristics

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(1) 39.7	(2) 35.3	(3) 33.6	23.5	16.3
China: Shanghai	(1) 38.1	(3) 31.8	(2) 34.0	24.3	24.1
China: Beijing	32.2	(2) 36.4	(1) 38.7	22.0	(3) 33.2
Hong Kong	(1) 52.1	(2) 42.0	(3) 38.1	26.4	4.6
Taiwan: Taipei	(2) 59.0	(1) 63.8	(3) 54.4	29.9	5.0
Korea: Seoul	(1) 55.0	(2) 47.6	(3) 35.4	20.6	5.2
Singapore	(1) 27.9	(2) 24.1	21.0	(3) 21.2	6.0
Thailand: Bangkok	(1) 31.2	(3) 27.8	(2) 31.0	22.6	15.8
Indonesia: Jakarta	(1) 23.3	(2) 22.4	(3) 21.8	12.7	12.7
Malaysia: Kuala Lumpur	(1) 47.7	(3) 34.7	(2) 37.0	28.7	19.4
Philippines: Manila	(1) 12.6	11.2	(1) 12.6	(3) 12.0	7.2
Vietnam: Ho Chi Minh City	(1) 56.6	(3) 40.1	(2) 47.9	31.3	19.6
India: Delhi	(1) 37.1	(3) 32.6	(2) 35.4	29.9	31.6
India: Mumbai	(2) 44.0	36.7	(1) 44.2	34.1	(3) 37.8
Russia: Moscow	(2) 39.1	(1) 43.2	(3) 19.4	13.6	5.6

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(3) 21.0	(1) 52.3	(2) 41.7	7.2	3.9
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• **Japanese products (35.0%) were the most cited as being *interesting/enjoyable*. There was a gap of 7.6 points with No. 2, European products.**

- When we asked which country's products felt interesting/enjoyable, Japanese products (35.0%) were No. 1, followed by European products (27.4%), American products (26.6%), Korean products (25.8%) and Chinese products (17.9%). With 7.6 points separating Japanese products and No. 2, European products, Japanese products appear to have a fun image in emerging markets.
- However, the score for Japanese products was lower than American, European, Korean and Chinese products in Beijing and Mumbai, suggesting that promotion of the emotional value of fun may be needed in these markets.

Feel interesting/enjoyable

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(1) 35.0	(2) 27.4	(3) 26.6	25.8	17.9
China: Shanghai	22.9	(2) 25.6	(3) 24.0	(1) 28.0	21.4
China: Beijing	22.4	(3) 24.6	(2) 26.6	(1) 30.2	23.5
Hong Kong	(1) 59.5	(2) 39.5	(3) 29.5	25.0	6.4
Taiwan: Taipei	(1) 44.0	(3) 30.6	(2) 36.3	27.5	11.3
Korea: Seoul	(1) 30.8	(2) 29.2	(3) 24.4	20.2	10.8
Singapore	(1) 22.9	17.3	(3) 17.7	(2) 19.5	12.5
Thailand: Bangkok	(2) 27.2	11.5	(3) 12.7	(1) 29.0	10.9
Indonesia: Jakarta	(1) 25.0	18.6	(3) 18.8	14.2	(2) 19.5
Malaysia: Kuala Lumpur	(1) 48.3	(2) 31.2	28.1	(3) 28.3	21.5
Philippines: Manila	(3) 11.6	8.4	10.6	(1) 13.2	(1) 13.2
Vietnam: Ho Chi Minh City	(1) 56.6	35.8	(2) 39.7	(3) 36.6	13.3
India: Delhi	(1) 41.6	(3) 34.9	33.4	34.6	(2) 37.5
India: Mumbai	33.7	34.8	(1) 42.8	(3) 38.8	(2) 39.6
Russia: Moscow	(1) 43.8	(2) 41.7	(3) 27.7	15.7	8.7

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(2) 19.9	(3) 19.4	(1) 51.5	3.7	2.2
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• **Korean products (41.5%) were most cited as having a *growing image*. There was a 6 point gap with No. 2, Japanese products.**

- When we asked what country's products have a growing image, Korean products (41.5%) were No. 1, followed by a margin of 6.0 points by Japanese products (35.5%). At joint No. 3 were American products and Chinese products (31.6%), with European products (31.4%) in 5th place. The difference between the scores of No. 2, Japanese products, and those below was only slight, indicating that the image of Japanese products is not very different from those of the other countries.
- In Shanghai and Moscow, the scores for American, European, Korean and Chinese products were higher than that for Japanese products. In terms of growing image, there is a trend toward high scores for Korean products, which have wide international product offerings that are proactively advertised abroad.

Have a growing image

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(2) 35.5	31.4	(3) 31.6	(1) 41.5	(3) 31.6
China: Shanghai	32.3	35.9	(3) 37.3	(2) 40.8	(1) 42.1
China: Beijing	(3) 35.8	35.6	(2) 36.9	35.4	(1) 54.0
Hong Kong	(3) 36.3	32.0	25.0	(1) 68.8	(2) 51.9
Taiwan: Taipei	(2) 51.0	(3) 42.3	30.9	(1) 53.6	16.0
Korea: Seoul	21.2	(1) 25.4	(3) 21.6	(1) 65.0	21.2
Singapore	(2) 32.0	26.4	(3) 27.2	(1) 37.8	26.4
Thailand: Bangkok	(1) 38.2	31.0	(3) 31.6	(2) 32.5	17.7
Indonesia: Jakarta	(1) 26.8	19.2	19.5	(2) 26.2	(3) 19.7
Malaysia: Kuala Lumpur	(1) 45.5	35.1	(3) 36.0	(2) 41.7	34.5
Philippines: Manila	(2) 29.8	(3) 27.8	(1) 31.8	23.6	16.6
Vietnam: Ho Chi Minh City	(2) 46.8	(3) 42.9	40.9	(1) 48.5	31.3
India: Delhi	(1) 45.2	31.0	(3) 36.9	32.6	(2) 37.9
India: Mumbai	(2) 46.2	40.3	(1) 49.5	43.3	(3) 45.9
Russia: Moscow	9.7	14.5	(3) 16.7	(1) 30.8	(2) 26.9

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(2) 19.4	12.7	(1) 40.2	(3) 16.6	11.4
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• **In value for money, Japanese products (34.1%) gained the highest score followed, 4.8 points behind, by Korean products (29.3%).**

- When we asked which country's products were good value for money, Japanese products (34.1%) came out tops, followed by Korean products (29.3%), Chinese products (26.0%), European products (25.4%) and American products (25.3%). With 4.8 points between first and second place getters, Japanese and Korean products, Japanese products appear to be regarded as reasonably priced in emerging markets.
- However, in Shanghai and Mumbai, the score for Japanese products was lower than that of American, European, Korean and Chinese products, suggesting that a rethink of pricing strategy in these markets may be necessary.

Value for money

(%)

	Japanese products	European products	American products	Korean products	Chinese products
14-city average	(1) 34.1	25.4	25.3	(2) 29.3	(3) 26.0
China: Shanghai	14.1	14.4	(3) 15.1	(2) 28.7	(1) 44.8
China: Beijing	(3) 12.4	10.2	10.2	(2) 19.9	(1) 44.0
Hong Kong	(1) 50.3	(3) 32.5	31.9	(2) 42.4	27.8
Taiwan: Taipei	(1) 50.4	(3) 31.1	(2) 32.5	23.6	9.3
Korea: Seoul	(2) 49.4	34.8	(3) 40.0	(1) 53.8	4.8
Singapore	(2) 32.8	18.9	23.1	(1) 38.9	(3) 30.8
Thailand: Bangkok	(1) 33.7	22.7	(2) 24.1	20.5	(3) 23.6
Indonesia: Jakarta	(1) 38.5	22.6	23.9	(2) 27.9	(3) 27.3
Malaysia: Kuala Lumpur	(1) 36.0	24.0	(3) 24.6	24.4	(3) 32.2
Philippines: Manila	(2) 17.2	11.6	13.2	(3) 13.8	(1) 17.6
Vietnam: Ho Chi Minh City	(1) 47.6	(3) 33.9	(2) 40.9	18.4	8.8
India: Delhi	(2) 33.7	29.4	(3) 33.5	33.0	(1) 38.7
India: Mumbai	27.1	(2) 41.6	28.7	(3) 31.2	(1) 43.6
Russia: Moscow	(2) 33.5	(3) 28.1	12.6	(1) 33.7	11.0

Reference: From Japan HABIT 2008 survey

Japan: Tokyo	(1) 68.6	(2) 31.1	(3) 13.0	7.2	4.2
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2. The Japanese product most cited as being *good quality* was digital cameras (28.6%).

- As we saw in 1, above, Japanese products have an image of quality in emerging markets. When we asked respondents which Japanese products they thought are good quality, digital cameras came out on top, followed by white goods, large-sized flatscreen TVs, passenger cars and mobile phones, in that order. Particularly high scores were recorded for digital cameras, white goods and large-sized flatscreen TVs in Ho Chi Minh City, Taipei and Hong Kong, for passenger cars in Ho Chi Minh City, Hong Kong and Kuala Lumpur, and for mobile phones in Ho Chi Minh City, Taipei and Kuala Lumpur.
- At the same time, scores for instant foods (9.7%), facial cleanser (12.0%) and skincare products (12.1%) were low at around the 10% mark. It may be necessary to promote the made-in-Japan quality of products in these categories.

Japanese products are of good quality

(%)

	Digital cameras	White goods	Large flat-screen TVs	Passenger cars	Mobile phones	Cosmetics (women*)	Skincare products	Facial cleanser	Instant foods
14-city average	(1) 28.6	(2) 28.5	(3) 25.8	(4) 25.4	(5) 17.8	(6) 13.6	(7) 12.1	(8) 12.0	(9) 9.7
China: Shanghai	17.7	19.3	19.7	18.4	13.1	8.8	6.3	8.0	7.4
China: Beijing	27.5	18.5	21.3	11.6	13.1	8.7	9.5	5.8	6.0
Hong Kong	49.1	47.6	45.0	33.3	24.5	42.3	37.5	34.6	31.1
Taiwan: Taipei	58.4	49.1	46.1	31.6	27.6	34.8	30.1	28.1	18.4
Korea: Seoul	18.0	9.2	6.0	9.8	2.4	8.8	5.8	6.6	5.6
Singapore	23.9	22.0	19.8	30.6	15.8	10.3	9.6	8.5	5.4
Thailand: Bangkok	12.9	22.4	11.3	29.5	8.8	6.9	4.9	4.6	7.7
Indonesia: Jakarta	21.8	29.8	23.7	29.6	13.9	1.9	1.3	1.1	0.9
Malaysia: Kuala Lumpur	27.3	30.2	27.5	32.0	27.3	15.4	13.8	14.1	10.1
Philippines: Manila	5.6	6.2	4.8	4.4	4.0	2.8	3.2	2.6	2.6
Vietnam: Ho Chi Minh City	64.8	71.4	59.7	48.3	39.9	13.3	10.4	13.7	4.7
India: Delhi	22.2	20.2	22.4	24.5	21.7	19.6	22.0	25.7	23.7
India: Mumbai	27.7	27.1	24.8	23.5	17.3	14.3	13.0	12.7	10.5
Russia: Moscow	23.3	26.0	29.7	28.1	19.2	2.7	1.9	1.4	1.4

* Women only asked about cosmetics

3. In goods, services and entertainment associated with Japan, household appliances & audio/visual devices (72.3%) came out on top, but animation/manga, sightseeing and food also gained high scores.

- When we asked what goods, services and entertainment respondents associate with Japan, household appliances & audio/visual devices was No. 1, followed by passenger cars, digital products (computers, mobile phones, digital cameras), animation/manga and sightseeing. Particularly high scores were recorded for household appliances & audio/visual devices in Ho Chi Minh City, Taipei and Hong Kong, for passenger cars in Kuala Lumpur, Taipei and Hong Kong, for digital products (computers, mobile phones, digital cameras) in Taipei, Hong Kong and Ho Chi Minh City, for animation/manga in Hong Kong, Taipei and Seoul, and for sightseeing in Taipei, Hong Kong and Ho Chi Minh City.
- However, low scores of around 20% were recorded for music (22.3%), sports (19.6%) and furniture & interior goods (18.0%), pointing to the need for a national effort to promote and sell these to emerging countries.

Goods, services and entertainment associated with Japan

(%)

	Household appliances & audio/visual devices	Passenger cars	Digital products (computers, mobile phones, digital cameras)	Animation/ <i>manga</i>	Sightseeing	Food
14-city average	(1) 72.3	(2) 67.1	(3) 62.1	(4) 49.3	(5) 37.6	(6) 37.0
China: Shanghai	74.3	54.1	56.6	64.0	27.3	25.4
China: Beijing	75.9	67.8	76.5	46.3	30.0	32.5
Hong Kong	90.8	81.3	90.8	85.6	72.3	83.4
Taiwan: Taipei	93.6	81.9	92.4	70.3	80.4	76.1
Korea: Seoul	78.2	61.4	76.0	69.0	48.8	52.2
Singapore	67.8	76.3	52.4	35.6	42.4	35.1
Thailand: Bangkok	62.6	62.5	46.3	45.7	21.3	39.7
Indonesia: Jakarta	61.3	66.6	49.7	31.5	8.5	23.3
Malaysia: Kuala Lumpur	76.6	86.8	64.1	41.9	39.9	36.4
Philippines: Manila	50.0	42.6	55.2	38.0	12.2	33.8
Vietnam: Ho Chi Minh City	93.9	78.3	87.3	53.0	56.4	26.2
India: Delhi	60.6	49.2	24.2	34.9	28.9	25.4
India: Mumbai	50.2	57.5	25.9	41.7	27.9	3.4
Russia: Moscow	76.2	72.7	72.3	32.8	29.7	25.2

(Continued)

	Fashion products/apparel	Luxury brands	Movies	Music	Sports	Furniture & interior goods
14-city average	(7) 30.4	(8) 27.5	(9) 26.3	(10) 22.3	(11) 19.6	(12) 18.0
China: Shanghai	22.7	12.0	17.8	17.3	10.4	12.3
China: Beijing	19.7	16.3	29.7	21.8	18.4	14.1
Hong Kong	69.0	44.1	47.5	53.4	20.9	26.8
Taiwan: Taipei	59.9	28.1	46.8	51.8	32.3	20.0
Korea: Seoul	25.2	18.2	21.8	20.4	12.2	10.8
Singapore	28.7	25.4	30.8	25.4	24.9	16.0
Thailand: Bangkok	26.8	19.2	22.6	16.7	9.0	12.4
Indonesia: Jakarta	8.0	15.9	14.0	6.3	11.8	8.9
Malaysia: Kuala Lumpur	28.1	34.3	27.3	22.1	29.3	26.4
Philippines: Manila	15.6	19.4	16.0	9.2	11.4	10.4
Vietnam: Ho Chi Minh City	39.1	24.1	36.2	25.2	24.3	24.1
India: Delhi	34.0	42.7	27.1	27.1	33.4	30.4
India: Mumbai	41.6	46.9	19.9	6.8	27.2	34.3

Russia: Moscow	7.6	37.8	10.3	9.3	9.3	4.7
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Hakuhodo Global HABIT 2008 Survey Outline

• Survey design

Cities surveyed: Shanghai, Beijing, Guangzhou, Dalian, Shenyang, Wuhan, Chengdu, Hangzhou, Ningbo, Xian (China); Hong Kong; Taipei (Taiwan); Bangkok (Thailand); Seoul (Korea); Singapore; Kuala Lumpur (Malaysia); Metro Manila (Philippines); Jakarta (Indonesia); Ho Chi Minh City (Vietnam); Delhi, Mumbai (India); Moscow (Russia); London (UK)

* Previous surveys have included Frankfurt & surrounds, Berlin (Germany); Paris (France); Milan (Italy); Madrid (Spain); Sydney (Australia); Fuzhou (China); and New York, Los Angeles, Chicago (USA)

Respondents: 500–800 males/females aged 15–54 per city

* Samples from Shanghai, Beijing and Guangzhou include an additional 1,210 Chinese Power *Sei-katsu-sha* (defined as males/females aged 25–44 with monthly household incomes of at least 8,000 yuan)

* Samples from Delhi and Mumbai include an additional 1,029 Indian Power *Sei-katsu-sha* (defined as males/females aged 25–54 of SEC A1 or above, with monthly incomes of at least 20,000 rupees)

All respondents were screened for household income to include those in the mid-upper income bracket (the top 50–85% of the respective city's population).

Period: May–July 2008

Survey method: In-home interviews (Asia, except Hong Kong, Taipei, Seoul; Europe, except Paris); personal interviews at a central location (Hong Kong, Taipei, Seoul), self-administered questionnaires (Paris)

• Main survey items (some only in Chinese and other Asian cities)

Demographics/Lifestyle

Demographics, lifestyle, country image, media/information behavior, shopping, hobbies, sports, durable consumer goods ownership, category perceptions, touchpoints, travel, housing

Product/Service usage

Insurance, credit cards, airlines, convenience stores, passenger cars, motorcycles, audio/visual devices, household appliances, mobile phones, computers/printers, digital

cameras/digital camcorders, copiers, wristwatches, video/computer games,
non-alcoholic/alcoholic beverages, foodstuffs (instant foods, snack foods), cigarettes,
toiletries, cosmetics, personal products, batteries, tires

- Data for Japan are from the HABIT 2008 survey, which was conducted separately from the Global HABIT 2008 survey.

Respondents: 5,000 males and females total in the Tokyo and Kansai areas of Japan (Tokyo: within a 40 km radius of the capital; Kansai: within a 20 km radius of the Kinki region)

Survey method: In-home interviews/postal surveys

Period: March 2008