

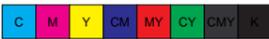
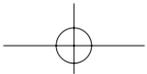


# A Deeper LOOK at Asian Youths

**HAKUHODO  
SEI-KATSU-SHA  
SURVEY**



**HAKUHODO HABIT ASIA 2001**



# ASIAN YOUTH



**SEI  
KATSU  
SHA**  
Insights

Support Stronger Branding  
in Asia

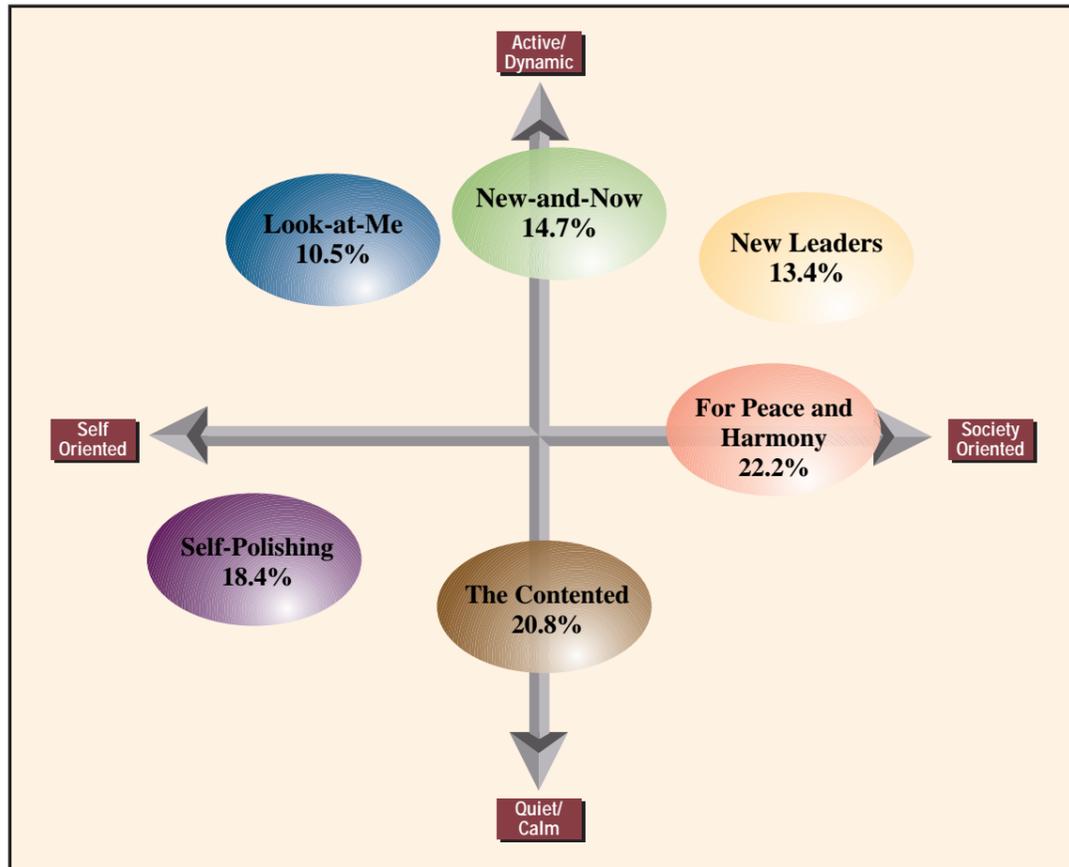




## Stronger Brands Need Deeper Roots

### SIX TYPES OF ASIAN YOUTHS

In responses by **Asian youths aged 15-24** to questions concerning lifestyle, consumption behaviour, and information behaviour, our analysis identified the six groups shown here: New Leaders, New-and-Now, For Peace and Harmony, Look-at-Me, Self-Polishing, and The Contented.



Advertising agency surveys of late-teen and early twenties consumer habits and attitudes frequently focus on the latest trends and fashions, and it is, of course, these young consumers who largely define “what’s happening” now. But Hakuhodo has a different perspective. Hakuhodo insists that consumers are *Sei-Katsu-Sha* human beings, for whom there is much more to life than shopping. When **Hakuhodo** looks at consumers in their late-teens and early twenties, Hakuhodo sees *Sei-Katsu-Sha* who are no longer children but individuals becoming adults. They are forming habits and attitudes they will carry with them for life, long after other fads replace those that are “in” today. That, we believe, is very important indeed for long-term brand management that looks beyond today’s trends to building strong brands and enduring revenue streams.

That, in a nutshell, is why, while the research reported here is focused on Asian Youths, young men and women between **the ages of 15 and 24**, it uses many of the same questions and the same conceptual framework as other Hakuhodo HABIT research. This research design makes it possible to do systematic comparisons with other HABIT research in Japan and with previous HABIT surveys in Asia. It allows Hakuhodo to probe more deeply, discovering the roots from which strong, durable brands can grow in addition to what we see happening now on the streets of Asia.

This report will begin by examining the distribution of six common attitude groups found, in varying proportions, among Asian youths who live in different Asian markets. It will then go on to compare how the attitudes of **young people aged 15-24** differ from those of a **middle-aged** sample 20 years older (**aged 35-44**) and to examine how the attitudes of **young men** differ from those of **young women**. In both cases, the surprising news is that in some parts of Asia, notably Japan and Taipei, there is very little difference at all. The report ends with a special section on the spread of Japanese popular culture in Asia (a follow-up on issues raised in last year’s HABIT ASIA 2000 research). This section also introduces a new research technique, an in-depth *Internet Insight* survey that is, in effect, a one-to-two-week long group interview with panel participants carefully selected to ensure the quality of the insights they provide.

#### HAKUHODO HABIT ASIA 2001

##### CITIES

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

##### SAMPLE

Male/female individuals  
Aged 15-54  
Approx. 800/city  
Male 5,692  
Female 5,689  
Total n = 11,381

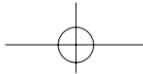
##### RESEARCH ITEMS

Lifestyle  
Information behaviour  
Media contacts  
Product ownership and usage  
Consumption behaviour  
Brand power (Hakuhodo original measurements)

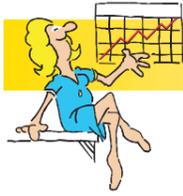
##### RESEARCH PARTNER

Asia Market Intelligence Ltd.

*Note: For purposes of this report, data from Delhi, Mumbai and Jakarta have been excluded from the statistical analysis.*



# Groups Found Everywhere



## New Leaders (13.4%)

Members of this group have a positive outlook on all aspects of their lives. They want to be successful but display a well-rounded balance in both attitude and behaviour.

- Equally likely to be men or women.
- Highly educated, they are likely to have university or higher degrees.
- Most likely to be found in Seoul (26.5%) and Hong Kong (20.4%).
- Interests include film (20.3%), playing with computers (25.2%), shopping (35.5%), reading (31.9%) and talking with friends (29.2%).
- Favourite magazines are film (23.6%), music (28.6%), computer/IT (19.3%) and Japanese fashion (13.6%).
- Favourite music are jazz/fusion (14.3%), European/American rock (19.3%), home country rock (21.6%), European/American pop (35.5%), Japanese pop (18.6%), and Hong Kong or Taiwan pop (44.2%).
- Favourite spectator sports are soccer (50.2%), basketball (42.9%), swimming (27.2%), and baseball (10.3%).
- Strong interest in financial news and investing (22.9%).
- Say their lives have improved (48.2%) and are likely to improve further (63.5%).



## For Peace and Harmony (22.2%)

Members of this group want stable, healthy lives. They treasure human relationships, cherish family happiness and want to help those in need.

- Women are in the majority (57.1%). There is little difference in age.
- The majority are students (60.7%), and most are high school graduates.
- Most likely to be found in Hong Kong (38.8%), Kuala Lumpur (33.0%) and Bangkok (33.0%).
- Interests include internet (30.2%) and reading (30.4%).
- Favourite magazines are film (23.8%), sports (22.6%), and lifestyle (16.1%).
- Like to listen to European/American pop (31.3%), home country rock (22.6%), movie soundtracks (20.4%) and Japanese pop (17.5%).
- Favourite spectator sports are soccer (47.0%), swimming (24.4%), and volleyball (20.8%).
- They are regular savers (61.5%) and careful about their monthly budgets (56.3%).
- Say their lives have improved (48.4%) and are likely to get better (64.3%).



## Self-Polishing (18.4%)

Indifferent to those around them, they seek self-fulfillment. Members of this group prefer healthy and affluent lifestyles.

- Men and women account for equal numbers. No difference between teens and twenties.
- Most have attended high school.
- Most likely to be found in Taipei (26.5%) and Kuala Lumpur (20.9%).
- Interests include watching TV (66.9%) and talking with friends (29.7%).
- Favourite TV programmes are Hong Kong or Taiwan dramas (42.3%), Hong Kong or Taiwan movies (33.3%), local news (45.7%) and international news (28.0%).
- Like to listen to Hong Kong or Taiwan pop music (46.0%).
- Say their lives have improved (38.2%) and are likely to get better (52.1%).

## New-and-Now (14.7%)

They love whatever is new, trendy and exciting. They live for the pleasures of the moment, prefer stores with large selections of goods and are eager to try new products.

- Fifty-five per cent are women, 62.4% are teens.
- Many are still students (67.0%).
- Most have gone to high school or vocational school.
- Most likely to be found in Shanghai (28.4%) and Singapore (21.6%).
- Interests include film (18.8%), listening to music (50.9%), internet (34.8%), shopping (38.5%), reading (31.8%) and talking with friends (31.8%).
- Favourite magazines are teen (22.7%), home-country fashion (20.3%), European/American fashion (13.0%) or Japanese fashion (10.0%).
- Like to listen to European/American pop (34.8%), Japanese pop (24.5%), Hong Kong or Taiwan pop (54.2%).
- Favourite spectator sports are basketball (43.3%) and tennis (12.1%).
- Say their lives have improved (41.8%) and are likely to get better (53.0%).



## Look-at-Me (10.5%)

Members of this group are eager to attract attention, especially from members of the opposite sex. They are eager to be seen as leaders and to do whatever they can for their companies and friends.

- Males are in the majority (58.7%). Even more are teens (59.6%).
- Most are students (67.2%) and most have attended high school.
- Most likely to be found in Seoul (15.0%), Taipei (15.0%), and Singapore (11.5%).
- Interested in computer games (22.1%).
- Prefer to watch sports (35.3%) and variety (32.3%) TV programmes.
- Favourite spectator sports are soccer (45.5%) and basketball (40.9%).
- Say their lives have improved (39.6%) and are likely to get better (52.8%).



## The Contented (20.8%)

Moderation in all things is their motto. They enjoy simple lives and are not active consumers.

- Men are in the majority (56.4%), more than half are teens (54.1%).
- The majority are students (60.5%).
- A relatively large proportion are university graduates or holders of advanced degrees. Also many have middle school or elementary education.
- Most likely to be found in Ho Chi Minh (45.0%) or Manila (36.5%).
- Primary interest is watching TV (63.3%).
- Favourite spectator sport is boxing (10.9%).
- Say their lives have improved (40.6%) and are likely to get better (60.9%).



## CITY-BY-CITY BREAKDOWNS

City-by-city breakdowns reveal important differences that seem more closely linked to average per capita income and income disparity than to regional or cultural differences. Japan and Taipei both have large middle classes and a high proportion of respondents in the "Self-Polishing" group. Hong Kong, by contrast, has wide disparities in incomes, despite being similar to Japan and Taipei in its high GDP per capita. That income gap in Hong Kong is related to a bipolar pattern, with many "New Leaders" as well as a large "For Peace and Harmony" group. In Shanghai, as one would expect in a city undergoing rapid economic growth, the "New-and-Now" group is large.





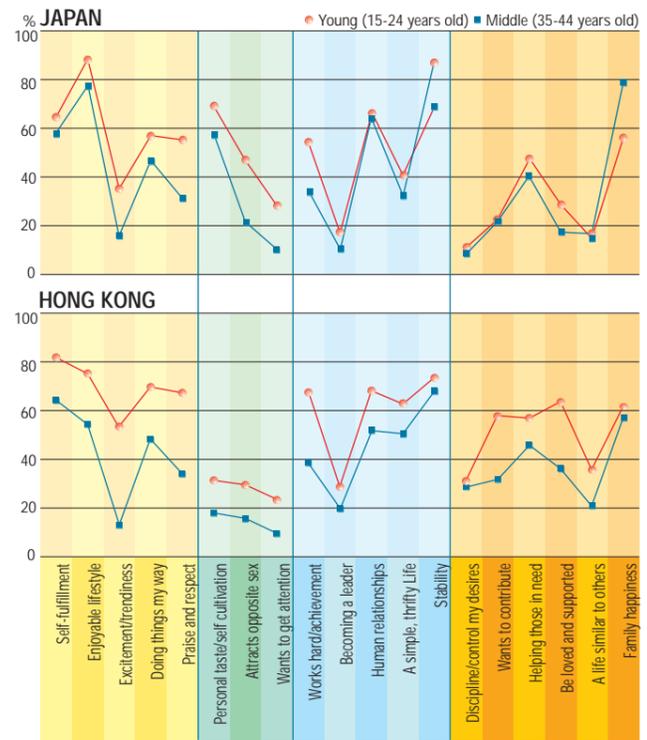
# Emerging Commonalities

## GENERATION GAP MAY BE SMALLER THAN YOU THINK

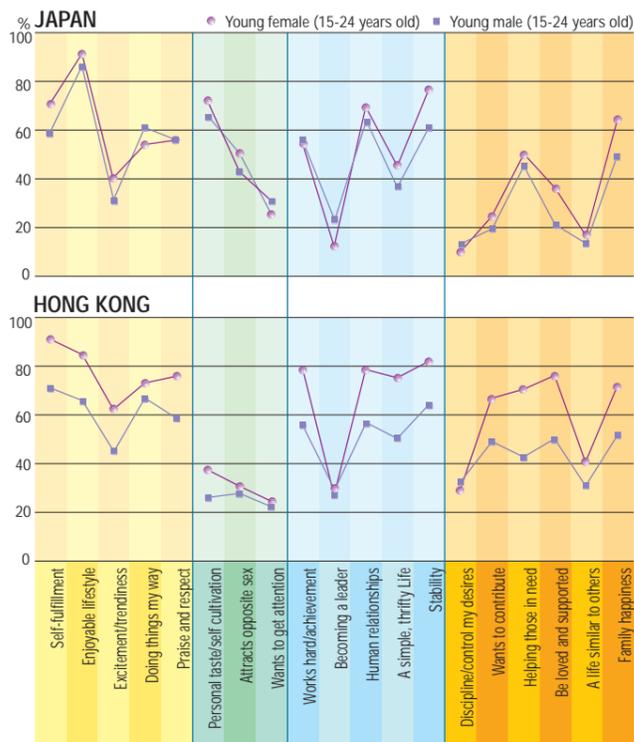
This analysis focuses on Hong Kong, Shanghai, Taipei, Bangkok, Seoul and Japan. We wondered how closely the attitudes of Asian youths today resemble those of their predecessors who are now 20 years older. Conventional wisdom suggests that wherever we look we should find a generation gap, with rebellious, progressive, trendy youths as opposed to staid, conservative, settled middle aged individuals. But when we compared the answers of **young people aged 15 to 24** with the answers of respondents **aged 35 to 44**, we were surprised. In Taipei and Japan, the patterns of answers received from both groups were virtually identical. There was no generation gap. In Hong Kong, the younger group posted higher scores for *all* questions but the overall pattern of responses was similar. The most striking differences were in the importance placed on working hard to succeed, wanting to contribute and wanting approval and support from others, where the younger group's scores were much higher.

There were also important gaps between the two groups in Shanghai. Here, the younger group strongly prefers excitement, novelty, and the latest trends, while the older group prefers stability and scores very low on interest in new trends. The younger group is also much more concerned with receiving approval and support from others.

In Bangkok, the younger generation is more interested in enjoying life, but the older ones show greater interest in cultivating their personal taste and also assign more importance on living a stable, secure life.



## MEN AND WOMEN MAY SHARE SIMILAR ATTITUDES



The conventional wisdom in marketing is that there is a large attitudinal gap between men and women, but in some parts of Asia their attitudes are pretty similar. This was our second surprise. In Taipei and Japan, not only were the patterns of responses virtually identical for different generations; they were also virtually identical for men and women. In Bangkok, too, the patterns were basically similar. Young women seemed more likely than young men to be interested in cultivating their personal tastes, seeking approval and support from others and obtaining family happiness. Young men were somewhat more likely to aspire to be leaders.

In Shanghai, both men and women are interested in what is new and trendy, with women's interest being particularly high. Also, women are much more interested in cultivating personal tastes than men.

Stronger differences appeared in Hong Kong. In Hong Kong, young women are much more likely to be interested in self-fulfillment, enjoyable lifestyle, excitement and current trends. They are also more likely to be interested in working hard to achieve success, to cherish human relationships, and to seek the approval and support of others as well as obtain family happiness.

## COLLAPSING DIFFERENCES

Looking at this data, it is hard to avoid the conclusion that economic development leads to shrinking attitudinal gaps, between generations as well as between the sexes. Where economies are most highly developed, in Taipei and Japan, differences shrink and blur. In the data presented here, response patterns are virtually identical. In Hong Kong, young women seem more lively, energetic, outgoing, aggressive and interested in fashion and trends than their male counterparts. Hong Kong has a high proportion of immigrants and wide disparities in incomes. That income gap remains despite achieving a high GDP per capita and is a driver in this dynamic society. Shanghai shows characteristics of a city undergoing rapid economic growth, notably in its female population's interest in enjoyment and excitement and in trying new products.



# Japanese Popular Culture in Asia

## ACCEPTANCE STRONG THROUGHOUT THE REGION

Historical and cultural differences do divide Asian markets. Still, what the data from HABIT ASIA 2001 shows is a pattern of broad similarities, with differences largely explainable by the levels of economic development. The six types of Asian youths identified by the statistical analysis are found in *all* of the markets surveyed. Broadly similar patterns of lifestyle values, consumer behaviour, and information-contact behaviour are found throughout East and Southeast Asia, a fact that may help to account for the immense popularity of Japanese popular culture throughout these regions.

It is no longer remarkable to discover the sorts of results displayed in the two tables that appear on this page. Awareness of Japanese characters approaches 100 per cent, on a par with Mickey Mouse, in every market surveyed. An unexpected result was the high scores Japanese products were given not only in terms of quality but also on perceptions of style and fun throughout the region; that contradicts the received opinion that Japanese products, while of high quality, lack a distinctive identity.

	Hong Kong	Shanghai	Taipei	Bangkok
Pokemon	96.0	40.3	99.0	56.5
Doraemon	99.5	98.0	99.5	96.5
Crayon Shinchan	98.5	55.2	99.0	97.0
Hello Kitty	86.6	99.0	99.0	79.5
Mickey Mouse	98.0	99.0	99.0	95.0

= very high

	Excellent Quality			Smart/Fashionable			Fun		
	Japan	U.S.A.	Europe	Japan	U.S.A.	Europe	Japan	U.S.A.	Europe
Hong Kong	75.1	37.3	49.3	87.6	16.9	14.9	89.6	20.4	19.9
Shanghai	77.6	46.8	44.3	68.2	46.3	33.3	62.7	32.3	15.4
Taipei	88.5	26.5	22.0	71.5	35.0	17.5	71.5	30.0	15.5
Bangkok	50.0	58.5	43.5	64.5	43.5	21.0	73.5	34.0	17.5

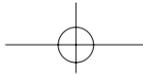
= very high

	Celebrity	Character
New Leaders	H+	H+
New-and-Now	H+	H+
For Peace and Harmony	H	H+
Look-at-Me	M	M
Self-Polishing	L	M
The Contented	L	M

H+: Evaluated very high    M: Moderate  
H: Evaluated high        L: Low

How do the six groups we introduced earlier differ in their receptivity to Japanese popular culture? We found that young people in the New Leaders, New-and-Now, and For Peace and Harmony groups were very open to Japanese pop culture. To learn why, at a deeper level, and explore the background, we carried an *Internet Insight* survey.





## Stronger Brands Need Fresh Insights

### **INTERNET INSIGHT: PUTTING IT TOGETHER**

Comments collected by Hakuhodo's *Internet Insight* survey flesh out these observations and offer new insights. Here are some examples.

#### **IN TAIPEI**

A liking for things Japanese is more than a way to be trendy. It is rooted in respect for Japanese manufacturing and traditional and modern Japanese culture. The feeling that Japan is familiar enhances acceptance of Japanese popular culture.

"Young Taiwanese love Japanese TV dramas. Ninety-nine per cent of people have seen them." (Female, 24)

"There's a wealth of imagination, and stories are told from several different angles. The camera work is outstanding." (Female, 22)

"Japanese culture is really meticulous. Japanese products are really good. Meticulous but also cute." (Female, 21)

"I like Japanese people. In the traditional culture, and pop, movies, drama, and fashion, every detail is right." (Male, 24)

"I like Japanese popular culture because Japanese tastes are similar to ours in Taipei. Japanese popular culture fits with ours well." (Female, 21)

"Herizu/哈日族 (Japan fans) in the narrow sense of the term accept anything and everything that comes from Japan, chase stars, and instantly imitate Japanese styles. They're people in their teens. Japan fans in the broad sense could be from 8 to 40 and are attracted to Japanese culture. I'm a Herizu/哈日族 (Japan fan) in that broader sense. That's because I've watched so much Japanese TV." (Female, 25)

#### **IN SHANGHAI**

Our respondents have grown up in a time of social and economical change. They belong to the first generation to encounter foreign culture as children. Acceptance of Japanese popular culture is rooted in familiarity first cultivated in childhood.

"In Japanese TV dramas, the acting is very natural. When I watch *Tokyo Love Story* or *Under One Roof* I find myself crying without thinking about it." (Female, 21)

"I would say that the people who like Japanese TV dramas are between 15 and 25 years old, romantic, with a lot of imagination. I am one of them." (Female, 21)

"I was small when a lot of foreign popular culture began to enter China. I grew up along with liberalisation, just as foreign culture was coming in. It opened up my mind." (Male, 24)

"I love Japanese *anime*, *manga* (cartoons), and video games. I grew up with them. *Dragon Ball* is a masterpiece. I can watch it over and over again." (Male, 18)

"I like Japanese trends. That may be because we are all part of an economically developing Asia and share a similar sense of beauty." (Female, 21)

#### **IN BANGKOK**

Here the situation is somewhat different from both Taipei and Shanghai. When today's Thai youth were children, it was mainly the boys who supported the boom in Japanese anime and manga. Now it is women in their teens and early twenties who support Japanese fashion.

"Japanese popular culture is very vigorous. It's a good fit with young Thai people's desire for self expression." (Female, 20)

"Japanese fashion has a strange, mysterious feeling about it that everyone likes." (Female, 18)

"Japan has become the fashion leader for young people in Thailand." (Male, 22)

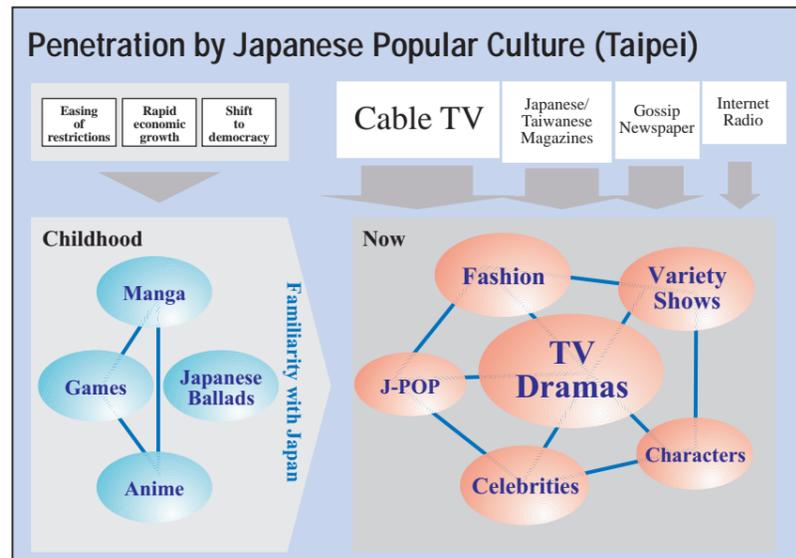
"Japanese culture? *Anime* and fashion have shot too far ahead. They seem to have left Earth behind." (Female, 25)

"Japan has the image of being original and creative." (Female, 22)

"When I was a child, it was all video games and *manga* (cartoons). I played *Dragon Quest*, *Final Fantasy*, and *Mario Brothers*. I could spend all day reading *Dragon Ball* or *Dr. Slump*." (Male, 22)

"I am a huge fan of Japanese anime and was often scolded for watching them too much. The images are beautiful and stimulate the imagination." (Female, 24).

We find that Japanese popular culture and Japanese culture in general feel very close and familiar to young Taiwanese. Young people in Taipei have been familiar with Japanese pop culture (including manga, anime, and video games) since childhood. Now, thanks to economic development, a democratic government, and greater openness to foreign cultures, huge volumes of information on Japanese pop culture reach them directly through TV, magazines, and the internet. As the diagram (right) suggests, while there are some differences between cities, Asian young people as a whole share a basic structure of receptivity to Japanese pop culture.



### **What's the Hakuhodo *Internet Insight* Survey?**

The internet is one of the ways in which Hakuhodo is continuing to build its research capabilities in Asia. Here we report the results of *Internet Insight* panels designed to probe more deeply into how Asian youths perceive and feel about Japanese popular culture. Panels of 10 to 12 individuals were selected from respondents to an initial e-mail sent to 20,000 prospects. Responses were filtered and participants selected for broad knowledge of popular culture and willingness to write freely and at length online. They are, in effect, young Asian experts on Asian youth attitudes.

Each group lasted from one to two weeks. In this survey, the topics covered included TV, movies, childhood cultural influences, fashion, characters, Japanese popular culture, and comparison between Japanese and their own country's popular culture. It is also possible to cover product purchase behaviour and brand evaluations.

The internet context gives time for participants to think seriously about their opinions, promote greater willingness to speak out, and offer the stimulation and deeper insights produced by the clash of contrary opinions. Because the participants cannot see each other, they speak more frankly and freely, and the researchers can more readily reach insights based on connections with cultural background and phenomena such as specific booms or trends that are difficult to develop from conventional group interviews.

## Looking Deeper to Build Strong Brands

As brand managers strive to build strong, durable brands in Asia, current fads may be poor guides. Traditional cultural stereotypes may prove no better. More than ever what they need are the deeper insights that Hakuhodo research, motivated by the *Sei-Katsu-Sha* concept and using a combination of advanced quantitative and qualitative methods, reveals.

To learn more about **Hakuhodo HABIT ASIA 2001**, please contact  
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