Complain more!
Avoid the topic!

You have to love them — the meetings that spin off into a black hole of complaints. The discussions that meander into random tangents.

We resent the complainers. We ignore the chatterers.

But haven’t you noticed how complaints and flip-pant observations serve a useful purpose?

“That’s no good.” “This is ridiculous.” “Boring!”

Sure, but you know what, complaints have the power to clarify objectives. And clarity is the seed of insight.

“Hey, that reminds me.” “Who’s up for lunch?”

“Did you hear the one about...” What comes next may seem off topic, but pay attention and you’ll probably see another thread in the story. Pull on it and you might uncover a new idea, unravel a new innovation, or expose a whole new paradigm.

And if that’s not enough, there’s another reason to love the endless complaints, odd jokes and verbal doodling: life sure would be boring if we all stayed on topic.
Content Acceptance in Asian Markets: Driving Economic Growth

The content industry’s business environment is changing dramatically everywhere, but especially in Asia. A growing number of countries/regions see the content industry as an engine of growth and are taking strategic steps to foster its development. They believe that a growing content market and content export success will have powerful economic effects, both direct and indirect. These high hopes for the content industry do, however, raise an important question: How do Asia’s content consumers see content produced in their own country or region versus that produced elsewhere? This is the question we attempt to answer, using data from Hakuhodo’s Global HABIT research.

Our comparative analysis of preferences for local, Korean, Japanese and Western content in the five content genres manga/anime, movies, music, dramas and makeup/fashion in 14 cities in Asia revealed the characteristics of each content genre and preferences for each type of content in the 14 cities.

The Data

The data used in this report were collected in 2010 and 2012 through surveys in Hong Kong, Taipei, Seoul, Singapore, Kuala Lumpur, Bangkok, Metro Manila, Jakarta, Ho Chi Minh City, Shanghai, Beijing, Guangzhou, Delhi, and Mumbai. Interviewees were male and female aged 15–54. Total sample numbers were 9,468 in 2010 and 10,932 in 2012.

Hakuhodo Global HABIT: an annual survey conducted in 36 major cities around the world, providing information that allows comparisons between cities and observation of trends in individual cities. This single-source survey focuses on respondents' lifestyles, value systems, media preferences, purchases, and usage of and perceptions toward a variety of brands and goods. With these data, users and supporters (i.e. future customers, adherents, and fans) of brands can be analysed.


Respondents:
Either 500 or 800 males and females aged 15–54 per city. The total number of persons interviewed was 16,000 worldwide. Based on screenings by household income, survey responses were obtained from persons in the middle/high income bracket of each city (50–90% of the urban population).

Power sei-katsu-sha: account for approx. the top 10% of income earners in each city. Due to their strong spending habits, active lifestyles, and high information awareness, power sei-katsu-sha are consumption leaders with significant power in the market. By paying attention to such power sei-katsu-sha, it is now possible to analyze the relationships between brands and consumers with strong purchasing power.

Main Items Surveyed (some apply only to China and other Asian countries):
- Sei-katsu-sha characteristics: Demographics, lifestyle, media contact, information gathering, consumer habits, hobbies, sports, travel, ownership of durable goods, category and brand perceptions, housing, and more.
- Products and brands: Product usage and brand evaluation (using Hakuhodo’s own Bonding & Voice branding metrics); Passenger cars, motorcycles, AV products, home electrical appliances, computers/printers, mobile phones/smart phones, digital cameras, cameras, copiers, wristwatches, game consoles, alcoholic drinks, non-alcoholic drinks, toiletries, cosmetics, and more.

Survey period:
May–August 2012

* Sei-katsu-sha in this report means strictly upper 10%, and in some aspects of lifestyles include more than just shopping. Hakuhodo introduced this term in the 1970s to emphasize our commitment to a comprehensive idea of lifestyle improvement and consumer time.

Japanese manga/anime still a powerful force

- Penetration by Japanese manga/anime is higher than that of local alternatives in most of the cities studied. Penetration is especially high in Hong Kong, Taipei, and Shanghai, where it is twice that of local content. In Hong Kong, in particular, the audience for Japanese manga/anime increased more than 20 points between 2010 and 2012. Strong growth is also visible in Shanghai and Metro Manila. One reason for the high acceptance of Japanese manga/anime may be that Japanese cartoon characters are not easily identified as belonging to particular races or ethnic groups. Another may be that many Japanese manga/anime make the personal growth of the hero, a theme with universal appeal, their central focus.

- High penetration of local manga/anime is most pronounced in Delhi and Kuala Lumpur. Since 2010, moreover, local content has also seen audience growth of 20 points or more in Hong Kong, Seoul, Metro Manila, and Delhi and growth of 10 points or more in Tokyo, Kuala Lumpur, Jakarta, and Ho Chi Minh City. The popularity of local manga/anime is growing in most of the cities studied.

Q: Which countries/regions’ manga or anime do you read or watch frequently? (Multiple Answer)

Frequently seen manga/anime (2012)

<table>
<thead>
<tr>
<th>Country/Region</th>
<th>% Other East Asian</th>
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<th>% Japan</th>
<th>% Korea</th>
<th>% Western</th>
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<tr>
<td>Singapore</td>
<td>88.6</td>
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<td>3.9</td>
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<tr>
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<td>5.9</td>
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<td>0.6</td>
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<tr>
<td>Guangzhou</td>
<td>82.1</td>
<td>11.7</td>
<td>4.2</td>
<td>2.0</td>
<td>0.6</td>
</tr>
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<td>4.3</td>
<td>2.0</td>
<td>0.7</td>
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<td>14.5</td>
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Change (2012 vs 2010)

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Local and Western movies attract larger audiences

- In 11 of 14 cities, local movies are No. 1. Their audience is up by 20 or more points since 2010 in Hong Kong, Taipei, Seoul, and Metro Manila. In Metro Manila, local movies have captured No. 1 position, dethroning Western movies. Conversely, however, the popularity of local movies is down in Beijing, Guangzhou, and especially in Shanghai, where it is down by more than 10 points.
- Western movies are No. 1 in Taipei, Singapore and Jakarta but are No. 2, behind local movies, in other cities. In Beijing, Seoul, and Jakarta, their audience has grown by 10 points or more since 2010.
- Japanese and Korean movies do not score nearly as high as local or Western movies. That said, Japanese movies have shown 10-point or higher growth in Hong Kong and Taipei, while Korean movies have posted similar growth in Hong Kong, Beijing, Metro Manila, Jakarta, and Ho Chi Minh City. Korean movies are expanding their geographical reach.

Frequently listened to types of music (2012)

**Q: What types of movies do you like? (Multiple Answer)**

**Preferred types of movies (2012)**

**Change (2012 vs 2010)**

Local No. 1, West No. 2

- Except for Singapore, local music is overwhelmingly the local favorite. In 9 of 14 cities (Hong Kong, Taipei, Seoul, Bangkok, Metro Manila, Jakarta, Ho Chi Minh City, Delhi, and Mumbai), 90% or more of our interviewees listen to local music. Since 2010, local music has seen growth of around 20 points in Hong Kong, Taipei, and Metro Manila.
- Western music is No. 1 in Singapore and No. 2 in 10 of 14 cities. It is listened to by 50% or more of those interviewed in Hong Kong, Taipei, Seoul, Singapore, and Metro Manila. Even in Mumbai, where preference for local content is strong, the audience for Western music has grown by more than 10 points since 2010.
- Japanese and Korean music are not as popular as local and Western music overall. But in these three Chinese cities, Shanghai, Beijing, and Guangzhou, Korean music has, by a narrow margin, surpassed Western music and become No. 2.
- Since 2010, local music has seen growth of around 20 points in Hong Kong, Taipei, and Metro Manila.
- Even in Mumbai, where preference for local content is strong, the audience for Western music has grown by more than 10 points since 2010.
- Japanese and Korean music are not as popular as local and Western music overall. But in these three Chinese cities, Shanghai, Beijing, and Guangzhou, Korean music has, by a narrow margin, surpassed Western music and become No. 2.

Local makeup/fashion a strong influence, but Japan and Korea also strong

**Q: What countries/regions’ music do you often listen to? (Multiple Answer)**

**Frequently listened to types of music (2012)**

**Change (2012 vs 2010)**

**Across all cities, local makeup/fashion defines the mainstream.**

- In virtually all of the cities studied, local makeup/fashion defines the mainstream. Local makeup/fashion’s score has risen by more than 20 points since 2010 in Hong Kong, Singapore, and Ho Chi Minh City.
- In Hong Kong and Taipei, the influence of Japanese makeup/fashion is either on a par with or slightly stronger than that of local products. Since 2010, however, the influence of local and Korean makeup/fashion has increased dramatically, putting strong pressure on Japanese makeup/fashion’s leading role.

**MAKEUP/FASHION**

**Influential makeup/fashion (2012)**

**Change (2012 vs 2010)**

**Q: What countries/regions influence your choice of makeup or fashion? (Multiple Answer)**

**Influential makeup/fashion (2012)**

**Change (2012 vs 2010)**

**In virtually all of the cities studied, local makeup/fashion defines the mainstream.**

- In virtually all of the cities studied, local makeup/fashion defines the mainstream. Local makeup/fashion’s score has risen by more than 20 points since 2010 in Hong Kong, Singapore, and Ho Chi Minh City.
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**DRAMAS**

Local and Korean dramas score high marks

- Local dramas are No. 1 in popularity in all of the cities studied. They are more than twice as popular as foreign dramas. In Delhi, Mumbai, Jakarta, Metro Manila, Bangkok, Ho Chi Minh City, and their audience in Beijing, where their score has risen by more than 20 points since 2010.
- Western dramas are second to local dramas in Taipei, Seoul, Singapore, and Kuala Lumpur, and their audience has increased by 10 points or more since 2010 in Hong Kong, Beijing, Seoul, and Jakarta. In contrast, their audience has declined by more than 10 points in Ho Chi Minh City.

**Preferred types of dramas (2012)**

**Change (2012 vs 2010)**

**Q: What types of dramas do you like to watch? (Multiple Answer)**

**Influential makeup/fashion (2012)**

**Change (2012 vs 2010)**

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Products, services and entertainment associated with Korea, Japan, and the USA

Our analysis revealed that in many cities there isStill a strong preference for local content. In some cities, however, the influence of foreign content is rising. But which country’s content is most popular? And what types of content are associated with them? In the tables below, using data from 13-item multiple answer questions, we compare the top five products, services and entertainment associated with Korea, Japan, and the USA in 2012 with those in 2007. We focus our analysis on Ho Chi Minh City, where Korean content is a rising force; Taipei, where Japanese content is powerful; Singapore, where Western content is more popular; and Jakarta and Mumbai, where local content is strong.

When they think of Korea

The last five years have seen many changes in top-five rankings. The change has especially been dramatic in fashion. In Ho Chi Minh City, where Korean products are popular, the top-five list now includes home electronics, automobiles and digital products in the durable goods category, as well as fashion and movies. The range of goods associated with Korea is widening. Movies has joined the list in Taipei, and both movies and music in Jakarta. In all these markets, Korea now evokes associations with fashion, movies and music as well as digital products, home electronics, and automobiles and other durable goods.

When they think of Japan

Here we see no major change. Manga/anime continues to score high, together with home electronics, digital products and automobiles. In Taipei, where Japanese content is strong, all top-five items score above 75%. Compared with five years ago, Japanese food products have joined the top five in Singapore, while medical care has joined the list in Ho Chi Minh City. In Mumbai, the association of Japan with manga/anime has grown sharply, from 3.6% to 52.5%. In both Ho Chi Minh City and Mumbai, food and medical care are now mentioned along with home electronics, cars, and other durable goods.

When they think of the USA

Movies and music are strong, with movies displacing tourism from the top spot in Taipei and Singapore in the last five years. In Singapore, Ho Chi Minh City, and Jakarta, luxury brands have entered the top five; in Mumbai they are No.1. In Singapore, where Western content is strong, in addition to movies and music, luxury brands and home electronics have risen in rank.

Content business approaches from Japan

In countries/regions throughout Asia, governments and private industry are working together to improve the competitive edge of locally generated content. Japan is no exception. The government and private industry work together to develop joint programs and promote Japanese content in localized versions worldwide.

Popular Content

Related Product Purchases

Consumer Durables Purchases

Enhanced National Brand/Image

Effective use of content is not confined to licensed merchandise or events. The effects of content have spread to consumer and durable goods and to services as well. The potential for content to become an effective fusion of soft and economic power is large. For marketers, being alert to cultural marketing perspectives when making effective use of content will become increasingly important.

Products, services and entertainment associated with Korea

Products, services and entertainment associated with Japan

Products, services and entertainment associated with USA

Reflections and Conclusions

Popular content leads to purchase of related products (fashion, cosmetics, food), which leads in turn to purchase of other consumer goods from that country (mobile phones, home electronics, cars), with the final result overall improvement in the country’s national brand and image. There is strong potential for synergistic relationships between content and other industries. One powerful example is the success of Korean dramas in Asia. While watching Korean dramas on TV, viewers see stars wearing Korean makeup and fashions, together with Korean home electronics and automobiles in fashionable settings. The success of Korean dramas fuels aspirations for Korean lifestyles throughout Asia, increasing the popularity of Korean products and stimulating their purchase, in what becomes an on-going cycle. The way in which Korean content producers, the Korean government, and other Korean industries have united to promote Korean culture could become a model for other nations as well.