

Asia Trend Map  
- FGI Report -

# Survey Outline

## 1. Purpose of Survey:

To understand the lifestyle of the middle class in Asian countries, including their consumption patterns, tastes and values in order to create and support strategic marketing approaches to Asia that will utilize Japan's strengths.

## 2. Research Topics:

1. To understand what kind of consumption trends and consumption values arise from basic consumption (clothing, food, homes and transport/portable devices, amusement, etc.) in each region.
2. To understand what kind of image Japanese products now have and their potential for acceptance within these trends and consumer attitudes.

## 3. Survey Method and Sample Size:

Focus Group Interview / Total 8 Groups (48) \* 2G = 48s (8G x 6s) per city

## 4. Countries Surveyed (Cities): 4 Countries (Cities)

Hong Kong, Singapore, India (Mumbai), Thailand (Bangkok)

## 5. Sample Criteria and Distribution:

People who are in the middle class of each area (country) and who are active in the three areas of "Information Gathering, Consumption Trends and Information Delivery."

Females: Those who have an interest in fashion, read fashion magazines frequently and spend money on clothing. \* Excluding married women living with their parent(s).

Males: Those who have an interest in and consume entertainment content and own a car/motorcycle and mobile phone. \* Automobile/motorcycle ownership will be determined depending on the situation..

## 6. Sample Distribution / Question Content: 2 Groups per Country

Female Group x 1G (6s): [Hypothetical questions on clothing, good and homes](#)

- 20-somethings (employed and married women) x 3s
- 30-somethings (married women with children) x 3s

Male Group x 1G (6s): [Hypothetical questions on transport/portable devices \(mobile phones, cars, motorcycles\) and amusement](#)

- 20-somethings (employed and unmarried men) x 3s
- 30-somethings (employed and married men) x 3s

## 7. Survey Dates (2010):

Hong Kong: Monday, Jan. 25 – Tuesday, Jan. 26 / Singapore: Thursday, Jan. 28 / Mumbai: Saturday, Jan. 30 / Bangkok: Monday, Feb. 1

## 8. Middle Class Definitions:

### Hong Kong

Monthly Household Income (Exchange Rate: HK\$1 = JPY 12) * Rounded down to nearest JPY 1,000.	People	%
Under HK\$4,000 (Under JPY 48,000)	175	7.5%
HK\$4,000 - 5,999 (JPY 48,000 - 71,000)	129.4	5.6%
HK\$6,000 - 7,999 (JPY 72,000 - 95,000)	161.7	7.0%
HK\$8,000 - 9,999 (JPY 96,000 - 119,000)	165.1	7.1%
HK\$10,000 - 14,999 (JPY 120,000 - 179,000)	349.8	15.1%
HK\$15,000 - 19,999 (JPY 180,000 - 239,000)	290.1	12.5%
HK\$20,000 - 24,999 (JPY 240,000 - 299,000)	238.3	10.3%
HK\$25,000 - 29,999 (JPY 300,000 - 359,000)	168.2	7.3%
HK\$30,000 - 3,4999 (JPY 360,000 - 419,000)	140.9	6.1%
HK\$35,000 - 39,999 (JPY 420,000 - 479,000)	91.9	4.0%
HK\$40,000 - 44,999 (JPY 480,000 - 539,000)	76.6	3.3%
HK\$45,000 - 49,999 (JPY 540,000 - 599,000)	53.4	2.3%
HK\$50,000 - 59,999 (JPY 600,000 - 719,000)	84.5	3.6%
HK\$60,000 - 79,999 (JPY 720,000 - 959,000)	84.4	3.6%
HK\$80,000 - 99,999 (JPY 960,000 - 1,199,000)	43.3	1.9%
HK\$100,000+ (JPY 1,200,000+)	66	2.8%
<b>Totals</b>	<b>2 318.7</b>	<b>100.0%</b>

- ※ Data checked by research companies in each country.
- ※ Light blue fields indicate the middle class.
- ※ India uses annual household income, while monthly income is used in other countries.
- ※ Exchange Rates
  - HK\$1 = JPY 12
  - SGD 1 = JPY 65
  - INR 1 = JPY 2
  - THB 1 = JPY 3

### Singapore

Monthly Household Income (Exchange Rate: SGD\$1 = JPY 65) * Rounded down to nearest JPY 1,000.	1,000 People	%
No Income	106.4	10.10%
Under SGD\$1,000 (JPY 65,000)	50.6	4.80%
SGD\$1,000 - 1,999 (JPY 65,000 - 129,000)	130.8	12.50%
SGD\$2,000 - 2,999 (JPY 130,000 - 194,000)	133.5	12.70%
SGD\$3,000 - 3,999 (JPY 195,000 - 259,000)	120.2	11.50%
SGD\$4,000 - 4,999 (JPY 260,000 - 324,000)	97.9	9.30%
SGD\$5,000 - 5,999 (JPY 325,000 - 389,000)	82.5	7.90%
SGD\$6,000 - 6,999 (JPY 390,000 - 454,000)	65.7	6.30%
SGD\$7,000 - 7,999 (JPY 455,000 - 519,000)	52.1	5.00%
SGD\$8,000 - 8,999 (JPY 520,000 - 584,000)	41.1	3.90%
SGD\$9,000 - 9,999 (JPY 585,000 - 649,000)	29.7	2.80%
SGD\$10,000+ (JPY 650,000)	138.3	13.20%
<b>Totals</b>	<b>1048.8</b>	<b>100.00%</b>

### Mumbai

Class	Monthly Household Income (Exchange Rate: INR 1 = JPY 2)	%
Deprived (Poor Caste)	< INR 90 (under JPY 180)	35%
Aspirers	INR 90 - 200 (JPY 180 - 400)	43%
Seekers (Middle Class)	INR 200 - 500 (JPY 400 - 1,000)	19%
Strivers (Upper Middle Class)	INR 500 - 1,000 (JPY 1,000 - 2,000)	1%
Globals (Wealthy)	INR 1,000+ (JPY 2,000)	1%
<b>Total</b>		<b>100%</b>

### Bangkok

Class	Monthly Household Income (Exchange Rate: THB 1 = JPY 3) * Rounded down to nearest JPY 1,000.	%
Lower (E)	< THB 15,000 (under JPY 45,000)	21.00%
Lower (D)	THB 15,000 - 22,499 (JPY 45,000 - 67,000)	20.00%
Middle (C)	THB 22,500 - 49,999 (JPY 67,000 - 149,000)	38.00%
Upper (B)	THB 50,000 - 59,999 (JPY 150,000 - 179,000)	12.00%
Upper (A)	THB 60,000+ (JPY 180,000+)	9.00%
<b>Total</b>		<b>100.00%</b>

Fashion

# Fashion

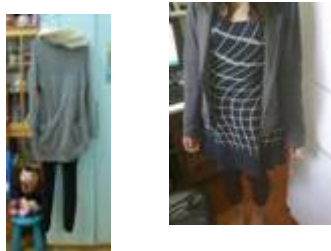
- Japanese fashion has penetrated the Hong Kong market the most, followed by Singapore, Bangkok and Mumbai.
- A number of Japanese fashion magazines are read in Hong Kong and people have experience with actual Japanese clothing at boutiques. There is not much information available in the other countries, where Japanese fashion's image has been created by occasional experience through just a few Japanese TV shows. Korean fashion has penetrated these markets more.
- As a result, information on Japanese fashion leans ultramodern and radical. It has a strong image of being too "excessive" and "extreme." An urgent task is to correctly deliver fashion information to large potential markets.

		Hong Kong	Singapore	Mumbai	Bangkok
Fashion & Fashion-Related Desires in Each City 1	Society & Cultural Background	<ul style="list-style-type: none"> <li>• <b><u>Appearance and other people's opinions are important.</u></b> Rather than wanting to be seen as upper class, there is strong desire to "<b><u>avoid humiliation.</u></b>"</li> <li>• Most women have jobs, so acceptance in the workplace is important.</li> </ul>	<ul style="list-style-type: none"> <li>• There is not so much interest in fashion, perhaps because the climate is hot and humid year-round.</li> </ul>	<ul style="list-style-type: none"> <li>• People <b><u>want to be seen as a little above their current class.</u></b></li> <li>• <b><u>Values are closer to Western than Asian.</u></b></li> </ul>	<ul style="list-style-type: none"> <li>• Trendy Western clothes (including counterfeits) are sold cheap at outdoor stalls and are often worn by female office workers.</li> </ul>
	Fashion-Related Desires	<ul style="list-style-type: none"> <li>• People speak most highly of <i>shiman</i> (being cultured and humbly feminine) in fashion.</li> <li>• People avoid fashion that is flashy and stands out too much because it is important that <u>your peers can easily approach and trust you.</u></li> <li>• Men are also concerned about acceptance.</li> <li>• People want simple, middle-of-the-road fashion and to feel more like their true selves.</li> <li>• Some end up wearing the same clothes, and there is strong resistance to figuring out prices, so there is little desire for "original items" or something "just for me."</li> </ul>	<ul style="list-style-type: none"> <li>• <b><u>There is little interest in the latest fashion. People place more importance on comfort</u></b> in a hot climate and mobility more than stylishness or trends.</li> <li>• There is a strong <b><u>taste for casual clothing.</u></b></li> <li>• <b><u>People avoid loud colors and shapes like in Hong Kong,</u></b> but people in Singapore have little interest in fashion are thus satisfied with "neat" clothes, as opposed to the choices made in Hong Kong due to appearance and other people's opinion.</li> </ul>	<ul style="list-style-type: none"> <li>• Young people have begun <b><u>moving from traditional folk clothing to Western clothes,</u></b> and both patterns exist.</li> <li>• There is a strong <b><u>desire to not be seen as out-of-style or out-of-date</u></b> and people enthusiastically take on particular fashion styles (now, for example, tight jeans) and popular brands. There is high interest in jeans brands.</li> <li>• Many people care much about fitting their figure and trust brands that do this.</li> <li>• There is high interest in Western fashion trends and <b><u>there is little awareness of Asian fashion.</u></b></li> </ul>	<ul style="list-style-type: none"> <li>• In contrast to Singapore, people <b><u>pay some attention to details and have relatively high fashion sense</u></b> in their preferences.</li> <li>• Relatively stylish and trendy foreign brands like Zara and MNG are popular.</li> <li>• People buy a lot of domestic brands. Many popular brands are geared toward female office workers (Jaspal, Chaps, etc.).</li> <li>• One reason why people buy domestic and Asian brands is that they <b><u>think Western brands' sizes don't fit</u></b> since their build is generally small.</li> </ul>

Actual Fashion

Info Sources

Hong Kong



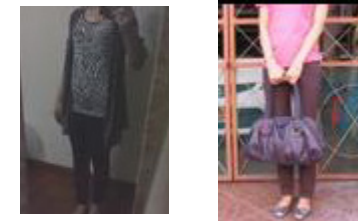
Singapore



Mumbai



Bangkok



- Main info sources are magazines, TV shows, store clerk recommendations and storefront displays.
- Some mentioned the Japanese magazine *Non-no*.

- People get info from friends' fashion and magazines. They search online and check info at stores.

- Main sources are storefront displays and magazines. Others include TV, the internet, signs and trade shows.

- People gather info from magazines and the internet and check whether it suits them at the store.

## Image & Expectations of Japanese Fashion

### Hong Kong

- **Information and products from Korean fashion have penetrated more than Japanese.** People think “Japanese and Korean are similar.”
- People are drawn more to Japanese and Korean, that is, Asian fashion than Western. **It fits their figure.**
- People **basically have a positive impression** of Japanese fashion as “cute,” and “high quality (durable fabric, comfortable, etc.).”
- People praise creative coordination and color schemes.
- However, people don’t like that **information on common Japanese fashion is not communicated properly.** Their impression is that they **cannot wear such clothes that are “too much”** like “incredibly short skirts with ridiculously high heels,” etc.

### Singapore

- Foreign fashions people check are from Korea or other countries with similar climates to Hong Kong, while **most do not know Japanese brands.**
- Compared to Europe, Japanese fashion’s image is positive, being **“basic (standard),” “something you can wear a long time regardless of fashion trends,”** etc., although **it also has an not very favorable image** as being “too extreme” and “always like school kids’ clothes.” As in Hong Kong, only some distorted information on advanced fashion is delivered and information on common fashion is not conveyed correctly.

### Mumbai

- People basically **lean more towards Western than Asian** fashion.
- **There is almost no information on Japanese fashion, nor even any awareness of it.**
- People typically imagine of **Japanese dolls and geisha** when they think of Japanese fashion.



### Bangkok

- **Korean fashion has deeply penetrated the market here.**
- There is little information about Japanese fashion. What is **occasionally seen is “really gaudy” or “really plain.”**
- **The impression is that it is simply extreme.** It seems to come from occasional information they get on Harajuku fashion and such, or from the simple clothes of Japanese housewives that appear in only Japanese TV program (variety show).
- People know about the Japanese brand Muji, but its image is that it “feels natural,” which is neither good nor bad.
- Colorful fashion like Zara and styles that feel more feminine would probably be more easily accepted in Bangkok than excessive styles like Harajuku fashion or Muji’s simple approach.

## Issues & Potential for Japanese Products

- Japanese fashion magazines are even sold on the streets. Japanese fashion information has penetrated this country the most out of the four.
- Even so, it is less than the amount of info on Korean fashion. Expanding promotions is an urgent task.
- In particular, introducing trendy female office work fashion that suits feminine tastes (i.e. *shiman*) would be effective.

- There is little information on Japanese fashion and people don’t have much of an impression about it.
- First of all, it is important to publicize information on “comfortable” and casual fashion that address consumers’ most important needs.

- This country has the least information on Japanese fashion out of the four.
- Many foreign fashions people check out are from the West and are very popular.
- Consumers are very conscious about status and brands, so it is important to not just put out a product, but to think carefully about a branding strategy.

- Although there is some information from Japan, fashion’s image is limited because there is no information that focuses on it.
- The first thing to do to improve Japanese fashion’s image is to export information through fashion magazines, TV dramas, etc.

Food



# Food

- In all four of the countries surveyed, we saw food incorporating foreign cuisine in households wanting meals to be original and colorful.
- Consumers in each city currently place importance on the following: safety in **Hong Kong**, flavor and convenience in **Singapore**, flavor in **Mumbai** and healthiness and beauty in **Bangkok**.
- Except for Mumbai, Japanese products are widely available. Consumers trust them for being high quality and safe, and they have established a positive reputation as have good flavor.
- Japanese products still don't have recognition in Mumbai.

		Hong Kong	Singapore	Mumbai	Bangkok
Food & Culinary Desires in Each City	Society & Cultural Background	<ul style="list-style-type: none"> <li>• People love to eat out. Many even eat out for breakfast.</li> <li>• Consumers don't trust food from the Chinese mainland as being safe.</li> </ul>	<ul style="list-style-type: none"> <li>• Many eat <b>simple</b> meals for lunch and breakfast at a restaurant or at home.</li> <li>• Singapore's health standards are strict, but they may be influenced by relatively relaxed attitudes towards foreign products, particularly Chinese.</li> </ul>	<ul style="list-style-type: none"> <li>• Some <b>foods are restricted</b> by religion and people adhere strictly. Certain segments of the population include <b>vegetarians</b> who eat no meat or fish at all and <b>followers of Jainism</b> who, in addition to meat and fish, do not eat anything that grows underground.</li> <li>• Many households have maids, but cooking, particularly <b>adding spices and flavoring, is a housewife's work</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Among people with Chinese heritage, some were seen here and there who do not eat beef for religious reasons.</li> <li>• People really love to eat out and many women do not cook by themselves because in many cases they work and parents or siblings help with housework.</li> </ul>
	Culinary Desires	<ul style="list-style-type: none"> <li>• People have a strong desire for <b>something original</b> using Western cooking or Japanese food rather than the exclusive diet of Chinese food their parents made and put on the table.</li> <li>• Not only are nutritional balance and flavor preferences important, but so is <b>presentation</b>.</li> <li>• People do not trust the safety of <b>fresh produce</b> if its place of origin is not listed, so they have <b>a strong interest in place of origin labeling</b>. They are also interested in organic foods.</li> <li>• They won't likely deviate from their healthy inclinations.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Deliciousness and simple preparation</b> are most important.</li> <li>• Accordingly, there is a strong desire for processed and pre-cooked foods that are quick to prepare.</li> <li>• Imports from Australia, New Zealand, Japan and elsewhere are thought of as being top quality, while consumers want to avoid suspicious Chinese-made products.</li> <li>• Although Singaporeans are inclined towards healthiness and the above-mentioned safety concerns, they are not incredibly sensitive about these issues. <b>"Deliciousness" is a higher priority</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• People eat <b>a high proportion of home-made food</b> at home compared to other areas and infrequently use processed foods.</li> <li>• Instant soups and cups of instant noodles are eaten, but they are rather <b>snacks</b>.</li> <li>• There are extremely high <b>particular preferences for good flavors</b>.</li> <li>• There is high interest in beauty (dieting) and health, but "flavor" is a higher priority.</li> <li>• There is a strong <b>interest in foreign cooking, with popular foods including richly flavored Italian, Mexican and Chinese</b>. In contrast to Indian food, which tends to look plain, <b>nice presentation</b> and <b>easy-to-carry</b> foods have appeal.</li> </ul>	<ul style="list-style-type: none"> <li>• Young people <b>want a lot of variety and originality</b> rather than the mainly orthodox, standard dishes made by their parents.</li> <li>• With the abundance of agricultural produce, many <b>place importance on freshness</b> with foods such as meat, fish and vegetables.</li> <li>• People <b>think a lot about beauty and health trends</b>, and many over fatty foods.</li> <li>• Food's <b>"appearance"</b> should look delicious.</li> </ul>

## Hong Kong

- **Many homes make use of** Japanese foods such as seasoning and instant noodles and **think very highly of them**.
- Japanese food's **safety, good flavor, abundant variety, simple preparation**, etc. do a lot to make it appealing.
- Some specific popular items that are bought and why are listed below:
  - Soy sauce**: "Tastes good with Chinese food."
  - Seasoning**: "Lots of variety to choose from."
  - Eggs**: "They're very sweet and have authentic egg flavor."
  - Pasta sauce**: "Lots of selection," "Can eat straight from the container," "Small portions are easy to use."
  - Sesame oil**: "It's aromatic."
  - Carrots and daikon radishes**: "They're tasty."
  - Snacks**: "The packages look nice," "They're tasty."
  - Sesame dressing**: "It goes with anything."
- Except for a very few brands that appear in the media like Demae Itcho and Cup Noodle, most are unknown and people judge whether a product is Japanese by the Japanese lettering or package design.
- Even among Japanese brands, those with products made in Japan are considered higher quality.



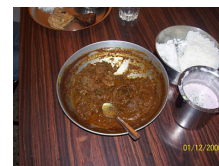
## Singapore

- Japanese food products and ingredients are thought to have **the highest level of taste and quality**. Prices are high and they cannot be bought frequently, but that makes them **feel special**.
- With this image, people recognize that **quality is very strictly managed in Japan**.
- Therefore, even among Japanese brands, those with products made in Japan are considered higher quality.
- Some specific popular items that are bought and why are listed below:
  - Instant noodles**: "In a bag but taste better than local noodles," "The taste is different."
  - Teriyaki sauce**: "Tastes good."
  - Fruits**: "Good quality, trustworthy and good value."
  - Curry powder**: "Very convenient."
  - Miso soup**: "Good for the body," "Convenient."
- Brands mentioned were instant ramen like Myojo and Nissin, as well as Pocky.



## Mumbai

- **There is almost no information on Japanese food and products and** people have just heard about them through magazines and **hearsay**.
- People eat Maggi, a brand of instant noodle cups, but they do not know Japanese products at all.



## Bangkok

- People have **very high regard** for Japanese products because of its **reliable quality, good flavor, pretty packaging, etc.**
- Some specific popular items that are bought and why are listed below:
  - Laver (seaweed)**: "It smells nice."
  - Chili pepper**: "I like it, so I'll buy it if I go to Japan."
  - Furikake**: "I stocked up on it when I went to Japan."
  - Glico snacks**: "I think it's great just because it's from Japan."
  - Snacks**: "The packaging is pretty," "I want to collect them," "They're tasty," "There's lots of variation," "They're made nicely."
  - Fuji dressing**: (Country of origin: Thailand) "The taste is delicious. It doesn't make me fat," "I can choose from various types like sesame and grains."
- **People don't worry much about country of origin** (e.g. Fuji dressing). On the other hand, **they feel that the products are more expensive because they originate in Japan**.



## Image and Expectations of Japanese Products 2

### Japanese Food at Home

- The overwhelming majority of foreign dishes cooked at home are Western food, while **Japanese dishes rarely make an appearance.**
- Japanese foods people can make themselves are sushi, ramen, miso soup, etc.
- With home-made sushi, ingredients are arranged somewhat and wrapped in a sushi-like role. People like that it is casual and that preparation is fun.

### Japanese Food in Restaurants

- Compared to pre-determined styles of western food ( appetizers and main dishes), consumers feel that **the freedom to order different kinds of dishes of what one likes** is extremely fun.
- Another appealing aspect of Japanese food is that it is **highly entertaining.** For example, the "Irasshaimase" greeting, watching food prepared on the cooking plate and beautiful arrangement.
- People also like that Japanese food is not high in fat and is healthy.
- The impression is that the taste is "light and delicate," but rather than taking this negatively, there is a favorable opinion that one "can enjoy **food's authentic flavor.**"

## Hong Kong

- Foods like sushi and sashimi have penetrated the market as food for the home fairly well. They are attractive because they are easy to make and have some novelty.
- Other Japanese food people make themselves include curry, ramen and miso soup.
- One can easily get foods and pre-cooked products at supermarkets and elsewhere.

## Singapore

- Basically, Japanese foods image is that it is expensive, but prices at Japanese restaurants have declined in recent years and **the food has become more familiar.**
- Japanese food's appeal is the **abundant variety of dishes** and for being **fresh without a lot of seasoning.**
- Consumers like the taste as being "very good."



## Mumbai

- **There is absolutely no information** on how to prepare dishes at home.

- Even when foods like sushi and soba are mentioned, most have only heard the names and have no experience eating them because there are few Japanese restaurants.
- Impressions of Japanese food given were **"lots of vegetables," "not oily," "lots of fish," "weak taste," and "healthy."**
- The healthy aspect is appealing, but the impression is that the food **has extremely weak flavor,** doesn't have spices and **would not suit them.**

## Bangkok

- People prepare foods like cups of instant noodles, miso soup, sushi and rice balls at home, though not often.
- They make their own kinds of rice balls and sushi using ingredients such as cucumbers, seaweed or crab sticks.

- There is a favorable impression that the food is **"healthy and not oily," "fresh" and "good quality."**
- People eat different foods for different purposes. For example, sushi, tempura and sukiyaki are eaten on special occasions, while dishes like ramen and takoyaki are eaten regularly.
- Consumers have high regard for Japanese cuisine's **beautiful arrangement.**
- Flavor is not rich, but people think of it positively because they feel it has **balanced and easy-to-eat tastes.**

## Issues & Potential for Japanese Products

- Japanese food has deeply penetrated Hong Kong. There are lots of Japanese products in supermarkets and other food markets.
- Japanese products are held in high regard and people buy them for their safety and quality, along the fun of having a wide variety to choose from.
- In addition to high safety and quality, people are receptive to Japanese food for being casual and fun.

- As in Hong Kong, Japanese products are widely available in supermarkets and other food markets.
- Japanese products have a very good image for quality and they have great potential.
- In particular, consumers are thought to be highly receptive to simple products.





- There is little information on Japanese ingredients and foods and of course few actual items.
- People have no impression of the food, asking, "What's in it?" or "What's it taste like?" This is why it is difficult for them to be receptive to products just by showing them. We need to offer them sufficient information and conduct information campaigns.
- Under religious precepts, one must take heed not to eat several foods said to be representative of Japanese cuisine such as sushi and sashimi.

- Japanese products and cooking has a very good image, but high prices are an impediment.
- If more prices could be offered in a more moderate range, they would have quite a bit of potential.

Homes

# Homes

- Japanese consumer appliances have deeply penetrated the markets in all four cities surveyed and have excellent reputations.
- They are recognized for their durability and good design, but they are praised most for their reliable quality because they are “made with proper quality control.”
- On the other hand, Japanese-made home fixtures are still little known. This is an area where consumers are not very aware of brands in the first place, thus contributing to this lack of knowledge.
- Except for Mumbai, homes in these countries and in Japan are small, so consumers could be made much more receptive if we can effectively promote Japanese home fixtures' compact size and the reliability of Japanese manufacturing.

		Hong Kong	Singapore	Mumbai	Bangkok
Housing Wants & Homes in Each City	Society & Cultural Background	<ul style="list-style-type: none"> <li>• There are several problems caused by building crowded multifamily housing such as small space, breathability and privacy from one's neighbors.</li> </ul> 	<ul style="list-style-type: none"> <li>• There are three main types of housing: single-family homes, condominiums and Housing Development Board (HDB) housing (high-rise public housing accounting for over 80% of residences).</li> </ul> 	<ul style="list-style-type: none"> <li>• Apartments are typical housing in the city.</li> </ul> 	<ul style="list-style-type: none"> <li>• Typical middle-class housing consists of rows of long single-family townhouses.</li> </ul> 
	Housing Wants	<ul style="list-style-type: none"> <li>• Major wants regarding housing are <b><u>wide living rooms and kitchens for interacting with family and friends</u></b> and securing space that is small yet <b><u>provides privacy</u></b>.</li> <li>• There is dissatisfaction concerning privacy, breathability, humidity, and small space, as well as insufficient water pressure on high floors and other issues.</li> <li>• People very much enjoy and have great interest in browsing for and buying kitchen accessories and interior decorations.</li> <li>• People are transitioning from conventional housing with large display shelves in the living room to a modern lifestyle with simple furniture.</li> </ul>	<ul style="list-style-type: none"> <li>• In contrast to India, there is a great desire for housing that is <b><u>easy to maintain rather than attractive on the outside</u></b> and that has wide, liberating space.</li> <li>• Consumers tend to prefer network-capable appliances such as video and DVD players in all-in-one type sets that look simple and make efficient use of space. However, standalone types are preferred for major appliances as it is easier to maintain.</li> </ul>	<ul style="list-style-type: none"> <li>• May be because the survey's Mumbai respondents were either of a somewhat higher social class than those in other areas, they had fewer specific complaints about housing.</li> <li>• Compared to other areas, respondents here made little mention of their housing's quality or maintenance. <b><u>There was a strong preference for beautiful and fine-looking exteriors</u></b>, with comments such as “I want guests to say the rooms are nice” and “When I saw the beautiful interior of my friends' homes, I bought nice-looking appliances for my home, too.”</li> </ul>	<ul style="list-style-type: none"> <li>• Many say that the quality of townhouses is not good enough, for example when it comes to sound proofing. Most of all, they want to <b><u>secure privacy from their neighbors</u></b> and make improvements to sewage and other installations.</li> <li>• Even many single-family homes do not clearly divide rooms such as the kitchen and living room, so there is a great desire to <b><u>secure private space</u></b>.</li> <li>• People in Bangkok tend to <b><u>emphasize relatively attractive and well-designed interiors</u></b>.</li> <li>• They are dissatisfied with the fairly poor quality of domestically produced housing materials.</li> </ul>



		Hong Kong	Singapore	Mumbai	Bangkok
Image and Expectations of Japanese Products	Image of Japanese Housing	<ul style="list-style-type: none"> <li>• Respondents' impression is that Italian or German household equipment is best.</li> <li>• Although the brand power of Japanese products is inferior, they have a favorable image in that people think that they are <b>good at conserving space</b> since they come from a country that also has small homes, and that they are <b>very practical</b> and <b>smart</b>, etc.</li> <li>• They feel familiar with kitchen and other products with which they are particularly concerned.</li> </ul>	<ul style="list-style-type: none"> <li>• With regards to household equipment, respondents barely know the brands or what country they are from.</li> <li>• They have a vague yet positive impression that European household equipment is good.</li> <li>• They do not know Japanese brands or manufacturers and have the impression that Japanese housing is <b>high quality</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Respondents use household equipment made in Europe, Malaysia and elsewhere.</li> <li>• Although they do not use Japanese household equipment, it has a <b>simple, user-friendly image</b> for having overall a white base in their color schemes.</li> </ul>	<ul style="list-style-type: none"> <li>• European household equipment has a good image and <b>Japanese products have low brand power</b>.</li> <li>• People's impression is that Japanese products are good at <b>conserving space</b> and are <b>well-designed</b>.</li> <li>• However, their image is degraded if consumers see that they are actually manufactured in an Asian country other than Japan.</li> </ul>
	Image of Japanese	<ul style="list-style-type: none"> <li>• Japanese products have an overwhelmingly positive reputation in the consumer appliance sector.</li> <li>• Manufacturer names like Sony, Panasonic, Toshiba and Hitachi have penetrated the market and are thought to be of better quality than Korean and other products.</li> <li>• Respondents said Japanese consumer appliances are attractive because of their <b>safety, durability, quietness, reliable performance</b> (e.g. refrigerators keep a steady temperature), etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Respondents have a very high regard for Japanese consumer appliances as being <b>"reliable," "durable," "compact" and "well-designed."</b></li> <li>• Besides Japanese brands, <b>Korean brands</b> also have an equally good image for quality, although they praised their <b>active promotions</b>.</li> </ul>	<ul style="list-style-type: none"> <li>• Japanese consumer appliances are considered No. 1. They have an image of having particularly <b>excellent quality, such as their durability</b>.</li> <li>• People choose Japanese brands for their important appliances because they are thought to be the best. Some settle for Samsung LG and other appliances for their prices.</li> </ul>	<ul style="list-style-type: none"> <li>• Japanese products have a very high reputation in the consumer appliance sector because of <b>advanced technology, durability and quality reliability</b>.</li> <li>• Manufacturer brands such as Sony, Panasonic and Toshiba have penetrated the market and have a high reputation.</li> </ul>
	Eco Appliances	<ul style="list-style-type: none"> <li>• There is great interest in environmentally-friendly consumer appliances.</li> <li>• Consumers want green appliances that not only save on electric bills, but also help protect the environment and recycle. They particularly want large consumers of electricity like air conditioners to be green.</li> </ul>	<ul style="list-style-type: none"> <li>• There is great interest in green appliances that can reduce electric bills while there is little awareness of environmental protection and recycling.</li> </ul>	<ul style="list-style-type: none"> <li>• There is great interest in green appliances.</li> <li>• Appealing points are being able to save on electric bills, environmental friendliness and being long-lasting.</li> </ul>	<ul style="list-style-type: none"> <li>• There is great interest in green appliances.</li> <li>• The implication is more of an interest in saving on electric bills than on protecting the environment.</li> </ul>
	Issues and Potential for Japanese Products	<ul style="list-style-type: none"> <li>• Japanese home fixtures have not yet penetrated the market as much as consumer appliances.</li> <li>• However, both Hong Kong and Japan have small homes, so if the reliability of Japanese manufacturing is promoted well, consumers will be very receptive.</li> </ul>	<ul style="list-style-type: none"> <li>• Push "easy maintenance" of home fixtures and people will likely be very receptive.</li> <li>• Consumer appliances' image is quite satisfactory, but sales efforts at storefront displays might be somewhat half-hearted.</li> </ul>	<ul style="list-style-type: none"> <li>• Japanese products have a very good image in the housing-related sector. By pushing their high quality and good user-friendliness while engaging in active promotions, consumers would be very receptive to them.</li> </ul>	<ul style="list-style-type: none"> <li>• Home fixtures are still not well recognized, so steady promotional efforts are required. Pushing compact size and good design would be effective for this.</li> </ul>

# Mobile Life 1: Mobile Phones

# Mobile Life 1: Mobile Phones

- Demand for high-spec phones is highest in Hong Kong, followed in descending order by Singapore, Bangkok and Mumbai.
- Respondents in all countries (cities) place emphasis on combining novelty with cool designs.
- There are large discrepancies in the penetration and image of Japanese products by city. Their image is advanced in Singapore, but in Hong Kong they are thought to be behind Taiwanese phones. There is little information available in Bangkok and Mumbai, so they have no distinct image.




		Hong Kong	Singapore	Mumbai	Bangkok
Mobile Phone-Related Wants and Actual Phones in Each City	Society & Cultural Background	<ul style="list-style-type: none"> <li>• Smart phones have spread through the market.</li> <li>• Phones are capable of various features such as web browsing, downloading and data streaming.</li> </ul>	<ul style="list-style-type: none"> <li>• Multifunctional mobile phones such as smart phones have spread through the market.</li> <li>• Phones can download mp3 audio files and connect to the internet smoothly.</li> </ul>	<ul style="list-style-type: none"> <li>• There are both high-spec and low-spec models in the market.</li> <li>• <b><u>Mobile phone connectivity is still not entirely stable.</u></b></li> </ul>	<ul style="list-style-type: none"> <li>• Multifunctional mobile phones are beginning to spread through the market and consumer change out their phones quickly.</li> <li>• There are no Japanese mobile phones in the current market.</li> <li>• Smart phones have not penetrated the market so much.</li> </ul>
	Mobile Phone Wants	<ul style="list-style-type: none"> <li>• Important features include <b><u>multifunctionality, good design, fast response, PC connectivity and memory capacity</u></b>. Overall, consumers want <b><u>high-spec</u></b> models.</li> <li>• Manufacturers such as HTC, Samsung and LG are popular.</li> </ul> <div style="display: flex; justify-content: space-around;">  </div>	<ul style="list-style-type: none"> <li>• Consumers think about the <b><u>impact when others see their phones</u></b> and have great interest the latest models and good designs.</li> <li>• <b><u>User-friendly operability</u></b> is important.</li> <li>• The iPhone, Nokia, HTC, etc. are popular.</li> <li>• Consumers frequently change brands because they want to try out new brands or a different OS or features.</li> </ul> <div style="display: flex; justify-content: space-around;">  </div>	<ul style="list-style-type: none"> <li>• Many people use separate mobile phones for business and personal use.</li> <li>• Important points include <b><u>a cool design, multifunctionality and a good support network</u></b>.</li> <li>• Features respondents said they need include internet connectivity, wi-fi, a camera, GPS capability and music.</li> <li>• Nokia is popular. After-sales service is good.</li> <li>• The impression is that upper class people use smart phones like the BlackBerry, so they want mobile phones that have similar features and appearance.</li> </ul>	<ul style="list-style-type: none"> <li>• As in India, many people use two mobile phones for separate purposes.</li> <li>• Important points a good design, a compact, thin shape and other aspects of <b><u>appearance</u></b> and <b><u>simple multifunctional controls</u></b>.</li> <li>• <b><u>Price is also fairly important.</u></b></li> <li>• Consumers are dissatisfied_ with <b><u>batteries that drain quickly and little memory</u></b>.</li> <li>• The iPhone and manufacturers like Nokia, LG and Samsung are popular.</li> </ul> <div style="text-align: right;">  </div>



Image and Expectations of Japanese Products

Image of Japanese Mobile Phones

Hong Kong

- Taiwanese and Korean-made mobile phones have a good image. Consumers think they are multifunctional and have expandable features.
- Japanese-made mobile phones are not very available in the market and people have only heard the names of brands like Sony, Docomo and SoftBank.
- Japanese phones' image is that they have **good design but features are behind those from Taiwan and Korea** because they are just basic. Their impression is that **many cannot use the internet**.
- Since there is little knowledge of Japanese-made multifunctional mobile phones, their image is that they are **good for women but not men**.
- People think there are mobile phones with advanced features in Japan, but they are not exported.

Singapore

- Foreign-made phones that have a good image are the iPhone and the BlackBerry. The iPhone is a status symbol for cool people and the BlackBerry for rich people.
- Japanese mobile phones' image is **cool, durable and high-tech** so there is great interest in them and some people are leaning towards purchasing them.
- Respondents could recall brands such as Sony, Sharp, Docomo, Fujitsu and Toshiba and they know about specific features (electronic payment methods like Osaisu-Keitai, 3-D imaging, etc.), so Japanese phones have penetrated the market here more compared to the other three cities.
- Features are advanced but "prices" and "after-sales service" are impediments.

Mumbai

- Nokia is overwhelming popular among foreign-made phones. Motorola (U.S.), Chinese and Korean-made phones are well known while Japanese-made mobile phones are relatively lacking in name recognition.
- Since people generally think that Japanese technology is excellent, they have a positive impression that **Japanese mobile phones must also be the most technologically advanced**.
- The market is extremely favorable for Japanese mobile phones to enter.
- Consumers do worry about high prices and customer service networks.



Bangkok

- Among foreign-made mobile phones, consumers very much like Samsung's photo quality and the iPhone's good design and easy controls.
- Japanese-made mobile phones are not very widely available in the market and consumers do not know that there are various designs and types of mobile phones.
- The only brand respondents could recall was Sony Ericsson.
- Their impression is that Sony Ericsson has good audio quality but their phones are not user friendly due to complicated controls.



Issues and Potential for Japanese Products

- We need to promote high-spec models to do away with the image that "Japanese mobile phones = not advanced."

- Japanese mobile phones are highly recognizable and people are leaning towards purchasing them. Issues are building up customer service and lowering prices.

- Japanese mobile phones have an extremely promising image among consumers and they would be highly receptive to should they be able enter the market at appropriate prices.
- Particularly among Indians who are concerned about status, Japanese brands have a strongly favorable image.

- Consumers know little about Japanese-made mobile phones. Promotions and image building are needed.
- Since price is fairly important, moderately multifunctional, inexpensive models are preferred over excessively high-spec phones.

## Mobile Life 2: Cars & Motorcycles

# Mobile Life 2: Cars & Motorcycles

- Automobiles are highly associated with status in Mumbai, but practicality is probably more important in the other cities.
- Japanese cars and motorcycles have a very good image in all four cities. They have an unmatched reputation for their technology, good fuel economy and durability.
- As added value, there was even greater interest in their driver assistance and high number of amenities than in being eco-friendly.
- Although there is great interest in eco-friendly cars and driver assistance features, there are cost concerns over actually purchasing and using Japanese automobiles.





		Hong Kong	Singapore	Mumbai	Bangkok
Automobile-Related Wants and Actual Phones in Each City	Society & Cultural Background	<ul style="list-style-type: none"> <li>As in urban areas in Japan, many make separate contracts for parking spaces and <b><u>maintenance costs are high.</u></b></li> <li>Since <b><u>the public transportation system is developed,</u></b> consumer avoids purchasing automobiles if they do not use them very frequently.</li> </ul>	<ul style="list-style-type: none"> <li>Owners typically trade in their vehicles every three years (which is related to the duration of their warranties).</li> <li>The government controls the number of vehicles through mandatory vehicle purchasing licenses that are valid for 10 years.</li> </ul>	<ul style="list-style-type: none"> <li><b><u>There is much congestion and roads are bad.</u></b></li> <li><b><u>Pollution and pollution-related problems are serious.</u></b></li> <li>Automobile popularization lags behind compared to the other three cities, but there are many motorcycles.</li> <li>Small cars are popular.</li> </ul>	<ul style="list-style-type: none"> <li><b><u>There is much congestion and drainage is bad.</u></b></li> <li><b><u>Pollution and pollution-related problems are serious.</u></b></li> <li>Japanese vehicles made in Thailand have spread through the market.</li> <li>Most taxis are made by Toyota.</li> </ul>
	Automobile Wants	<ul style="list-style-type: none"> <li>Important points include <b><u>price, fuel economy, high seating capacity, sturdiness, design, easy maintenance and large trunk space.</u></b></li> <li>In general, <b><u>practicality is more important than status.</u></b></li> <li>Vehicles with the best status are luxury European cars such as Mercedes.</li> <li>Not many people modify their vehicles.</li> </ul> <div style="display: flex; justify-content: space-around;">   </div>	<ul style="list-style-type: none"> <li>Japanese vehicles have penetrated the market deeply, with 4 out of 6 survey respondents owning a Japanese automobile.</li> <li><b><u>Durability and good fuel economy</u></b> are the most important points.</li> <li>Western (Ford, Audi, BMW, Mercedes, etc.) are considered the most premium or luxury vehicles, but Japanese automobiles are praised for their relatively moderate prices and good fuel economy and quality.</li> <li>Some owners make vehicle modifications. The purpose is to improve basic drivability and comfort, so there are no extreme automobile enthusiasts.</li> </ul>	<p><b>Cars</b></p> <ul style="list-style-type: none"> <li>The most important points are <b><u>fun driving, cheap maintenance costs</u></b> (including good fuel economy) and <b><u>good design.</u></b> Many use diesel vehicles out of cost concerns.</li> <li>Consumers yearn for bigger, more powerful and stylish cars.</li> <li>Many <b><u>purchase cars without many added features</u></b> and install them later, such as power windows and stereo systems.</li> </ul> <p><b>Motorcycles</b></p> <ul style="list-style-type: none"> <li>Good fuel economy, cheap maintenance costs and high speed are important.</li> </ul>	<ul style="list-style-type: none"> <li>Important points are <b><u>durability, wide interior space and appearance.</u></b></li> <li>Quite a few owners modify or add to the interior and exterior of their vehicles, such as by changing out the steering wheel or installing stereo systems, so <b><u>appearance and a comfortable interior are more important</u></b> than practicality.</li> </ul> <div style="display: flex; justify-content: space-around;">   </div>

Image and Expectations of Japanese Products

Image of Japanese Automobiles

Hong Kong

- Many have ridden in Japanese automobiles before and like a very large number of aspects including **low prices, good fuel economy, cool designs and easy maintenance.**
- An attractive point is that the purchaser has **the freedom to select the equipment one wants from a large number of versions.**
- There was greater interest in driver assistance features and such than eco-friendliness (hybrid cars, etc.).

Singapore

- Japanese automobiles are highly praised for their **“good quality,” “affordable price range,” “good fuel economy,”** etc. and have spread through the market.
- On the other hand, Toyota and other makers who **manufacture vehicles outside of Japan have a negative image in that their features are thought to be inferior.**
- Although there is interest in being eco-friendly, Japanese automobiles are not attractive due to the impression that they seem expensive to buy and maintain.



Mumbai

- Cars
- Japanese cars have already spread through the market and their image is that their **technology is advanced and service is good,** so Japan is number one at making cars.
  - Although consumers are heavily inclined towards purchasing Japanese cars, **price is the biggest impediment.**
  - Indian cars are inexpensive and low-tech, but it **their appeal is that it is easy to obtain unique parts.**
  - There is very great interest in eco-friendly cars in terms of both cost and the environment.
- Motorcycles
- Designs and body shapes are attractive. However, the impression is that they are extremely expensive.



Bangkok

- Japanese automobiles' image is that they are **high-tech with good fuel economy, durable and moderately priced.**
- **Easily obtainable car parts** are an attractive point.
- Some want to ride in high-class Japanese cars more than conventional vehicles, so **loyalty to Japanese cars is high.**
- However, the high number of Toyota cars serving as taxis contributes to **lowering their status.**
- Eco-friendly cars are very well-known and consumers feel they want to have advanced cars in particular, like a hybrid.
- However, when one actually rides a vehicle, they feel unsure about durability and how easy it is to drive.

Issues and Potential for Japanese Products

- Japanese automobiles do not have better status than European, but rather practical prices are important in Hong Kong and Japanese automobiles are thought of very highly.

The characteristics of Japanese automobiles match Singaporean drivers' desires for cars that are sturdy and inexpensive to maintain. They are highly receptive to Japanese automobiles.

- Important points for both cars and motorcycles are good fuel economy and inexpensive maintenance. Since there are many extra features, easily obtainable parts and good repair service are absolutely needed.
- Japanese cars are thought to be the best and have a very good reputation.

- Compared to other cities, consumers are very conscious of how their cars look have a high interest in interior and exterior modifications and replacing parts.
- Japanese automobiles have deeply penetrated the market simply because they are manufactured locally, but whether their status can be maintained or not is an issue.

Entertainment Content

# Entertainment Content

- We observed that Japanese entertainment content has penetrated the Hong Kong market the most, followed by an equal degree of penetration in Singapore and Bangkok. Mumbai has the least penetration.
- The Japanese entertainment that has penetrated the markets in all cities the most is video games and anime. Both have a good reputation for being high quality and deep.
- Except for in Mumbai, Korean TV shows, music and celebrities are more popular than Japanese.

		Hong Kong	Singapore	Mumbai	Bangkok
Entertainment Content and Desires in Each City	Society & Cultural Background	<ul style="list-style-type: none"> <li>• Single people are very interested in entertainment content but tend to lose interest somewhat upon marrying.</li> <li>• As in Japan, the trend is that 20-year-olds are watching less TV.</li> </ul>	<ul style="list-style-type: none"> <li>• People are busy with work and rarely enjoy entertainment on weekdays. In particular, married people have low interest relative to single people.</li> </ul>	<ul style="list-style-type: none"> <li>• There is a lot of entertainment content from abroad in the market (especially from the English-speaking world).</li> </ul>	<ul style="list-style-type: none"> <li>• Single people have greater interest in entertainment content. This decreases somewhat upon marrying and they opt for entertainment they can enjoy with the family.</li> </ul>
	Movie Desires	<ul style="list-style-type: none"> <li>• Married people watch movies somewhat infrequently, but a wide range of people enjoy them.</li> <li>• While pioneering, high-tech major releases pioneering like <i>Avatar</i> are popular, there is also a great desire for works that have a well-developed plot.</li> </ul>	<ul style="list-style-type: none"> <li>• Movies are a popular form of amusement on weekends.</li> <li>• Big action, comedies and fantasy are popular.</li> </ul>	<ul style="list-style-type: none"> <li>• People watch an incredible amount of movies.</li> <li>• Other than Indian movies, thrilling action films like <i>Avatar</i> that pioneer the latest technology are popular.</li> </ul>	<ul style="list-style-type: none"> <li>• A wide range of people enjoy movies.</li> <li>• Audiences are highly receptive to foreign films and expect powerful settings and technology.</li> <li>• There is a great desire for works with lots of entertainment value like action, comedy and science fiction. There is a great desire for epic works with good visuals.</li> </ul>
	Image of Japanese Movies	<ul style="list-style-type: none"> <li>• Japanese movies are not a major part of the market, but they have penetrated 20-year-old market quite well.</li> <li>• Compared to foreign films from Hollywood and elsewhere, Japanese movies feel <b><u>uniquely “meaningful,” “unique,” etc.</u></b></li> </ul>	<ul style="list-style-type: none"> <li>• Most people do not know Japanese movies. There is somewhat of an impression of genres like “horror” and “fantasy.”</li> <li>• Since audiences can watch English-language movies without subtitles, they think that <b><u>watching a movie with subtitles is troublesome.</u></b></li> </ul>	<ul style="list-style-type: none"> <li>• <b><u>There is very little information on Japanese movies</u></b> and people have little experience with them.</li> <li>• For those who do have experience, their impression is that they have deep stories and realistic content compared to Indian films, many of which are not surrealistic.</li> <li>• Movies have to be dubbed into Hindi or English.</li> </ul>	<ul style="list-style-type: none"> <li>• Anime has made a strong impression, while <b><u>movies have made no impression</u></b> since no respondents could name one. A common impression is that they are “sad works” for some reason or another.</li> </ul>

Entertainment Content and Desires in Each City

Desires for

	Hong Kong	Singapore	Mumbai	Bangkok
Desires for	<ul style="list-style-type: none"> <li>The groundwork has already been laid for anime to be accepted even among adults, as Chinese cartoons are also popular.</li> </ul>	<ul style="list-style-type: none"> <li>Adults have also watched cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>This generation does not have a lot of experience with cartoons.</li> </ul>	<ul style="list-style-type: none"> <li>People basically think that anime is for kids.</li> </ul>

Image of Japanese Anime

Image of Japanese Anime	<ul style="list-style-type: none"> <li><b>Hayao Miyazaki anime</b> such as <i>Ponyo</i> are <b>popular in this group</b>.</li> <li>While American cartoons are purely for children, many Japanese anime are for adults, so the impression is that they are <b>for children but with deep content</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Respondents could name works by director Hayao Miyazaki and <i>Doraemon</i>.</li> <li>They praised <b>Miyazaki's works for having deep stories</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Anime that respondents knew were <i>Pokemon</i> and <i>Dragon Ball</i>. <i>Crayon Shin-chan</i> also has high recognition.</li> </ul> 	<ul style="list-style-type: none"> <li>Some are familiar with older works like <i>Dragon Ball</i>, <i>Perman</i>, <i>Slam Dunk</i> and <i>Doraemon</i>, but <b>current works have had no impact</b>.</li> </ul>
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Video

Video	<ul style="list-style-type: none"> <li>Unmarried people play games for personal enjoyment, while many married people play them as a way to communicate with their children.</li> </ul>	<ul style="list-style-type: none"> <li>People like action and adventure games.</li> <li>Soccer games are popular.</li> </ul>	<ul style="list-style-type: none"> <li>People prefer puzzle games that require thinking (such as Sudoku).</li> </ul>	<ul style="list-style-type: none"> <li>Video games are very popular and are a common way to enjoy one's free time.</li> </ul>
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Image of Japanese Video Games

Image of Japanese Video Games	<ul style="list-style-type: none"> <li>Compared to the impression that many American games are lackluster, Japanese games' image is that they <b>understand players' feeling and are well made</b>.</li> <li>As with anime, the impression is that they <b>seem deep</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Some people have played Japanese soccer games like Pro Evolution Soccer.</li> </ul>	<ul style="list-style-type: none"> <li>Japanese games are penetrated the market quite well and thinking games are highly thought of.</li> </ul>	<ul style="list-style-type: none"> <li>Respondents know games such as Pro Evolution Soccer and SimCity.</li> <li>The impression is that there are many action games. Also, <b>they are highly praised for being high-tech and having good graphics and sound</b>.</li> <li>Learning games and such that <b>increase one's knowledge are popular</b>.</li> <li>The impression is that games are mostly Japanese products.</li> </ul>
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Entertainment Content and Desires in Each City

TV

**Hong Kong**

- TV is the most everyday and familiar form of amusement, but as in Japan, the trend is that young people are watching less TV (preferring media offering easier control over time than TV such as the internet).

**Singapore**

- Since many people are busy with work on weekdays and it is difficult to enjoy other entertainment, they watch news, documentaries, variety shows and other forms of easily enjoyable entertainment when they get back home.

**Mumbai**

- Both domestic and foreign reality shows and comedies are popular.
- There is great desire for programming with global content and such that fulfills viewers' thirst for knowledge.

**Bangkok**

- Watching TV is the main form of amusement enjoyed on weekdays.

Image of Japanese TV Shows

**Hong Kong**

- Popular Japanese dramas like *Mr. Brain* are watched to a certain extent in Hong Kong.
- However, **they feel that reading subtitles in no dubbed shows is troublesome.**

**Singapore**

- Japanese TV shows are not viewed much, but people watch TV shows like *Ninja Warrior* (*Sasuke* in Japanese) that are unlike few others.

**Mumbai**

- They are completely unknown.

**Bangkok**

- *TV Champion* broadcasts in Thailand are relatively popular, but **Korean TV shows are more prominent.**

Music

**Hong Kong**

- Foreign music people listen to is almost exclusively from America and Europe, while most Japanese music has not been heard.

**Singapore**

- Foreign music like rock and R&B are popular.
- K-pop is more popular than J-pop.

**Mumbai**

- Respondents cited foreign music from the English-speaking world as that which they like.

**Bangkok**

- Thai pop is popular and popular foreign music is K-pop.
- Hikaru Utada and X-Japan are known.

Magazines

**Hong Kong**

- Excluding specialty magazines, most respondents in the survey do not read Japanese magazines, so it was difficult to gain an understanding.

**Singapore**

- People do not read Japanese magazines at all.
- Some know that there are Japanese fashion magazines for women.

**Mumbai**

- Survey respondents have not read many Japanese magazines.

**Bangkok**

- Some read sports, TV and gossip magazines, but nobody knows of or reads Japanese magazines.

Issues and Potential for Japanese Products

- Japanese entertainment content that has penetrated the market well is video games and anime, and people have had relatively more contact with movies and TV dramas as well.
- Overall, Japanese entertainment is seen as being unique with deep content compared to that from America and elsewhere.
- It is praised for taking the audience's thinking into consideration and being carefully produced.

- Other than video games and anime, Japanese entertainment content is largely unknown.
- People are more familiar with Korean and Hong Kong TV shows and music.

- People know of Japanese video games and anime, while there is largely know information at all on other genres of Japanese entertainment content.
- Other than "excellent manufactured products," information on Japan is scarce and Japan's image is not well-defined, so exporting entertainment content is an urgent task.

- While Japanese video games receive high praise, overall, Korean entertainment content has a greater presence than Japanese.



Other Topics

# Other Topics

## Recognition of Written Japanese Characters

- Most people in all cities cannot properly recognize the Japanese language.
- People tend to think that product names containing kanji are Chinese. Katakana and hiragana more easily make them believe the products are Japanese.
- When recognized as Japanese-made, product image usually improves as “seeming to be good quality,” “safe,” etc.

### Hong Kong

- People guess a product is probably Korean or Japanese if the writing is all katakana.
- In Hong Kong, expressions using the Japanese character の (pronounced “no” and basically meaning “of”) are common, so phrases with “[kanji] の [kanji]” are not easily linked to Japan. Accordingly, 午後の紅茶 (Gogo no Kocho, or “Afternoon Tea”) does not seem to be a Japanese product.
- Image improves when a product is thought to be Japanese.

### Singapore

- People are confused as to whether a product is Chinese or Japanese when there are kanji.
- The Japanese language is easily recognized if it is only katakana.
- Image improves when the Japanese language is recognized, but conversely, it goes down if thought to be Chinese.

### Mumbai

- People cannot determine whether writing is Chinese or Japanese when it includes kanji.
- The image is cheap and low quality if made in China, while recognizing the Japanese language changes the image to one of good quality since it is made in Japan. It is important to erase doubts such as, “Is it made in China?”

### Bangkok

- People think writing is in Chinese if it contains kanji.
- They do not mistake it for Chinese if it is all katakana, but they have no idea that it is Japanese.
- Image improves if they know it is written in Japanese.

### Samples Shown



Pom Juice



Karada Meguri-cha



Gogo no Kocho

## Appeal of Japanese Animated Characters

- Except for in Mumbai, Japanese animated characters have deeply penetrated the markets in three cities and there is great interest in character merchandise.
- Owning character merchandise is typical among women in these three cities.

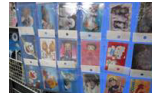
### Hong Kong

- Japanese characters have incredibly high recognition and some people collect them.
- Consumers tend to purchase more character merchandise if they are free gifts attached to magazines, etc.



### Singapore

- Japanese characters have penetrated the market and many people own character merchandise.
- People understand a product is made in Japan and its image improves by printing characters on the package.



### Mumbai

- Compared to the other three cities, Japanese characters are little known. Interest in and purchasing trends for merchandise is not high, so putting characters on packaging will not be a big draw for attention.

### Bangkok

- If characters are put on packaging, people easily understand a product is made in Japan and may cause them to make a first-time purchase.



## Word Recognition

- There was little recognition of the below words in any of the cities. People only knew some of them in Singapore, where there is more information compared to the other cities.

	Hong Kong	Singapore	Mumbai	Bangkok
Akhabara	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Known as a place name.</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>
Otaku	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Known.</li> <li>• Has an image related to cosplay.</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>
Manga	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Known. People only read English translations.</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown</li> </ul>

Reference

# FGI Attendee Profiles

\* Equivalent amounts in Japanese yen shown in ( ).

## G1: Hong Kong, Men, Age 20-39

No.	Age	Married ?	Co-Residing Family	Occupation	Monthly Household Income
1.	38	Yes	Wife, oldest son (1 yr.), oldest daughter (1 yr.)	Salaried worker	HK\$30,000-34,999 (360,000 – 420,000)
2.	35	Yes	Wife, oldest daughter (2 yr.)	Salaried worker	HK\$25,000-29,999 (300,000 - 360,000)
3.	35	Yes	Wife, 10-year-old daughter	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
4.	28	No	parents, younger brother	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
5.	29	No	—	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
6.	28	No	parents, sister	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)

## G2: Hong Kong, Women, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	Monthly Household Income
1.	33	Yes	husband, oldest son (5 yr.), next-oldest son (2 yr.)	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
2.	37	Yes	husband, child (6 yr.)	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
3.	33	Yes	husband, oldest daughter (6 moths.)	Housewife	HK\$25,000-29,999 (300,000 - 360,000)
4.	28	No	—	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
5.	23	No	parents, younger brother	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)
6.	25	No	parents	Salaried worker	HK\$30,000-34,999 (360,000 - 420,000)

## G3: Singapore, Men, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	Monthly Household Income
1.	21	No	—	Salaried worker	SGD 7,000 - 7,999 (45.50,000 - 520,000)
2.	21	No	—	Salaried worker	SGD 7,000 - 7,999 (45.50,000 - 520,000)
3.	27	No	—	Salaried worker	SGD 7,000 - 7,999 (45.50,000 - 520,000)
4.	34	Yes	Wife	Salaried worker	SGD 6,000 - 6,999 (390,000 - 45.50,000)
5.	35	Yes	Wife	Salaried worker	SGD 7,000 - 7,999 (45.50,000 - 520,000)
6.	35	Yes	Wife	Salaried worker	SGD 7,000 - 7,999 (45.50,000 - 520,000)

## G4: Singapore, Women, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	Monthly Household Income
1.	24	No	—	Salaried worker	SGD 7,000 - 7,999
2.	35	Yes	husband, children (7 yr., 3 yr.)	Housewife	SGD 7,000 - 7,999
3.	33	Yes	husband, 2 children (2 yr., 1 yr.)	Salaried worker	SGD 6,000 - 6,999
4.	36	Yes	husband, 3 children	Salaried worker	SGD 5,000 - 5,999
5.	25	No	—	Salaried worker	SGD 5,000 - 5,999
6.	27	No	—	Salaried worker	SGD 6,000 - 6,999

G5: India, Men, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	世帯年収
1.	28	No	mother, older sister	Self-Employed	INR 500,000-799,999 (1,000,000 – 1,600,000)
2.	32	Yes	Wife, child	Self-Employed	INR 500,000-799,999 (1,000,000 – 1,600,000)
3.	30	Yes	Wife, child	Salaried worker	INR 800,000-999,999 (1,600,000 – 2,000,000)
4.	38	Yes	Wife, oldest son	Self-Employed	INR 200,000-499,999 (400,000 – 1,000,000)
5.	23	No	—	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)
6.	32	Yes	parents, Wife	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)

G6: India, Women, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	世帯年収
1.	33	Yes	husband, child	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)
2.	22	No	—	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)
3.	24	No	—	Self-Employed	INR 200,000-499,999 (400,000 – 1,000,000)
4.	36	Yes	husband, oldest daughter	Salaried worker	INR 500,000-799,999 (1,000,000 – 1,600,000)
5.	38	Yes	husband, son	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)
6.	25	No	parents	Salaried worker	INR 200,000-499,999 (400,000 – 1,000,000)

G8: Thailand, Women, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	Monthly Household Income
1.	28	Yes	Wife, 2 children	Salaried worker	THB 50,000 (150,000)
2.	36	Yes	parents, Wife	Salaried worker	THB 46,000 (138,000)
3.	39	Yes	Wife, 1 child	Salaried worker	THB 55,000 (165,000)
4.	28	No	parents, older/younger brothers	Salaried worker	THB 50,000 (150,000)
5.	26	No	parents, older sister	Salaried worker	THB 52,000 (156,000)
6.	28	No	parents, older/younger brother	Salaried worker	THB 50,000 (150,000)

G7: Thailand, Men, Age 20-39

No.	Age	Married?	Co-Residing Family	Occupation	Monthly Household Income
1.	36	Yes	husband, child	Salaried worker	THB 58,000 (174,000)
2.	32	Yes	husband, child	Self-Employed	THB 55,000 (165,000)
3.	32	Yes	husband, child (4 yr.)	Salaried worker	THB 50,000 (150,000)
4.	26	No	parents	Salaried worker	THB 55,000 (165,000)
5.	27	No	parents	Salaried worker	THB 40,000 (120,000)
6.	27	No	parents	Salaried worker	THB 55,000 (165,000)

# Interview Flow

For female respondents

Survey Items	Questions	Purpose
1. Self-Intros (10 min./10 min.)	<input type="radio"/> Name <input type="radio"/> Co-residing family <input type="radio"/> Occupation <input type="radio"/> Hobbies/interests	
2. Food (50 min./60 min.) <div style="border: 1px dashed black; padding: 5px; margin-top: 10px;"> <p>* Since respondents in this survey's target countries had a hard time thinking of Japanese food they prepare for everyday meals at home, and those with experience had it when eating out, we asked separate questions for the following two settings:              At-home meals: Japanese food products and ingredients rather than Japanese food as menus/courses.              Eating out: Japanese food as a menu/course.</p> </div>	<input type="radio"/> Eating habits <ul style="list-style-type: none"> <li>▪ Do you have a maid at home? If so, who prepares your meals? (The maid only, you decide the menu and the maid prepares it, you make it yourself occasionally, etc.)</li> <li>▪ Is there anything you can't eat for religious reasons?</li> <li>▪ Do you typically eat at home or eat out for breakfast, lunch and dinner?</li> </ul> <input type="radio"/> Eating at home & awareness <ul style="list-style-type: none"> <li>▪ If you eat at home, how much do you make from scratch? (Buy pre-cooked meals; cook using processed foods; make everything from scratch.)</li> <li>▪ When you eat at home, what's important to you? (Nutritional balance, food safety, dieting, easy preparation, presentation, etc.)               <ul style="list-style-type: none"> <li>— Why is that important to you?</li> <li>— How specifically does that important point affect what you buy and prepare? (E.g. choosing low-fat products, choosing trustworthy producers, etc.)</li> </ul> </li> </ul> <input type="radio"/> What foods produced abroad appeal to you more than domestically produced foods? <ul style="list-style-type: none"> <li>▪ What about them appeals to you?</li> </ul> <input type="radio"/> Food products and ingredients made in Japan and their image (not about "Japanese food" as a menu/course, but individual food products and ingredients produced in Japan) <ul style="list-style-type: none"> <li>▪ Appealing categories of Japanese food products (specific answers, product names if possible)               <ul style="list-style-type: none"> <li>— Appealing points (How are they different compared to products produced in your country or other countries besides Japan?)</li> <li>— Is there anything that stops you from purchasing Japanese products? (High price, few channels through which to purchase them, etc.)</li> </ul> </li> <li>▪ Specific experience with and impression of/receptiveness to Japanese food products/ingredients               <ul style="list-style-type: none"> <li>— Japanese-made snacks</li> <li>— Instant ramen cups</li> <li>— Miso soup</li> </ul> </li> <li>▪ Overall impression of Japanese-made food products and ingredients</li> </ul> <input type="radio"/> Japanese food <ul style="list-style-type: none"> <li>▪ What things (menus/courses) come to mind when you think of "Japanese food"?</li> <li>▪ When do you eat Japanese food and what do you have?</li> <li>▪ Impression of Japanese food               <ul style="list-style-type: none"> <li>— Overall impression (Healthy? Expensive? etc.)</li> <li>— Impression of flavor (Weak? Lacks punch? etc.)</li> </ul> </li> </ul>	<p>* To understand basic trends and preferences of eating habits in each country.</p> <p>* To understand the image and potential of Japanese products in the food sector.</p>

<p>3. Homes (30min./90 min.)</p>	<p>○ Home Conditions</p> <ul style="list-style-type: none"> <li>• Type of residence (owned or rented, approximate size and space, building age)</li> <li>• Dissatisfaction with current residence (including furniture and home appliances) <ul style="list-style-type: none"> <li>* Issues such as home quality (narrow space, bad electrical supply, etc.), home installations (old plumbing, etc.), home appliances, furniture/interior, etc; cut short due to no need for discussion on public infrastructure such as frequent power outages.</li> </ul> </li> <li>• How do you deal with or respond to these dissatisfying points?</li> </ul>	<p>* To understand basic housing environments, awareness trends and preferences in each country.</p>
	<p>○ What kind of home do you want to live in 5 years from now? (Get respondents to answer with realistic wishes.)</p> <p>○ What home-related products produced abroad appeal to you more than products made domestically?</p> <ul style="list-style-type: none"> <li>• What about them appeals to you?</li> </ul> <p>○ Impression of Japanese-made home equipment and installations (toilets, customizable "System Kitchens," baths, sinks, storage furniture, etc.)</p> <ul style="list-style-type: none"> <li>• Do you know about or have any relevant information?</li> <li>• What kind of impression do you have?</li> </ul> <p>○ Impression of Japanese-made home appliances</p> <ul style="list-style-type: none"> <li>• Appealing Japanese home appliances and what makes them appealing</li> <li>• Impression of Japanese home appliances</li> </ul> <p>○ Level of interest in eco-friendly home appliances (products with low power consumption)</p> <ul style="list-style-type: none"> <li>• How important is an eco-friendly product to you when you buy a replacement home appliance?</li> <li>• What about eco-friendly home appliances appeals to you? (Low power consumption, recycling ease, etc.)</li> <li>• Do you want to buy an eco-friendly product even if the price is somewhat higher?</li> </ul>	<p>* To understand the image and potential of Japanese products in the home and living sector.</p> <p>* To understand the level of interest in eco-friendly home appliances.</p>
<p>4. Fashion (50 min./140 min.)</p> <div style="border: 1px dashed black; padding: 5px; margin-top: 10px;"> <p>* We got keywords that appear in quotes, but since these alone were abstract and people's impression of what words mean vary by area, we got a visual representation by asking, "Are there any famous people who embody that image with their fashion?"</p> </div>	<p>○ Favorite brands and stores you shop at</p> <ul style="list-style-type: none"> <li>• Specific brands and store names</li> <li>• Reason why that brand appeals to you and specific appealing points</li> <li>• Why are those points important to you? We'd like to know the values that lie behind the appeal of those brands.</li> </ul> <p>○ What kind of woman's look do you want your fashion to create? (Professional, feminine, trendsetting, urban, conservative, etc.)</p> <ul style="list-style-type: none"> <li>• Why do you want to look that way?</li> <li>• Are there any famous people who embody that image with their fashion?</li> </ul> <p>○ What do you check for fashion information? (Magazines, show windows, celebrity fashion, etc.)</p> <p>○ What foreign countries' fashion do you want or have an interest in?</p> <ul style="list-style-type: none"> <li>• What about them appeals to you?</li> <li>• Is Japan one of the countries whose fashion interests you?</li> <li>• What aspects of Japanese fashion do you have an interest in?</li> <li>• What fashion do you think looks Japanese?</li> </ul> <p>○ Impression of Japanese products</p> <ul style="list-style-type: none"> <li>• Appealing Japanese brands and products in the fashion sector (specific answers, product names if possible) <ul style="list-style-type: none"> <li>— Appealing points (How are they different compared to products produced in your country or other countries besides Japan?)</li> </ul> </li> </ul> <p>○ Are there Japanese animated characters (not only in fashion) that you like? (Characters respondents like, not ones for children in their countries.)</p> <ul style="list-style-type: none"> <li>• What do you like about them? What about your impression of them do you like?</li> <li>• Do you want products with that character on the packaging or as that product's mascot, etc?</li> </ul>	<p>* To understand the basics of fashion, awareness trends and preferences in each country.</p> <p>* To understand the image and potential of Japanese products in the fashion sector.</p>
<p>5. Appeal of Written Japanese (10 min./150 min.)</p>	<p>Show samples with Japanese written on them (Pom Juice, Karada Meguri-cha, Gogo no Kocho)</p> <p>○ Which countries' writing can you understand?</p> <p>* Does your impression change when you find out the writing is Japanese, and if so, how does it change?</p>	<p>* To understand how much people understand Japanese writing and how much it affects their impressions.</p>



For male respondents

Survey Items	Questions	Purpose
<p>1. Self-Intros (10 min./10 min.)</p>	<p><input type="radio"/> Name   <input type="radio"/> Co-residing family   <input type="radio"/> Occupation  <input type="radio"/> Hobbies/interests</p>	
<p>2. Mobile Life (80 min./90 min.)</p> <div style="border: 1px dashed black; padding: 5px; margin-top: 20px;"> <p>*As motorcycle makers are limited, we spent more time on questions regarding the automobile ownership.</p> </div>	<p><input type="radio"/> Mobile phone usage and features used</p> <ul style="list-style-type: none"> <li>▪ Can you connect to the internet?</li> <li>▪ (For those who can connect to the internet) What features do you use besides telephone conversations and SMS? (Email, watching videos, watching promotional videos, downloading music, games, community interaction, shopping, finance, searching traffic routes, etc.) <ul style="list-style-type: none"> <li>— In what settings do you use them?</li> </ul> </li> </ul> <p><input type="radio"/> Reasons for choosing currently owned mobile phone</p> <p style="border: 1px solid black; padding: 2px; margin: 5px 0;">Get the respondents to put their phones on the table if they have them.</p> <ul style="list-style-type: none"> <li>▪ When did you buy it?</li> <li>▪ Why did you select your current mobile phone? (What made it appeal to you or why was it better compared to other models?)</li> <li>▪ What dissatisfied you upon using it and why?</li> <li>▪ What models or type/features do you want in the future and why?</li> <li>▪ Knowledge of and interest in smart phones</li> </ul> <p><input type="radio"/> Impression of Japanese-made mobile phones</p> <ul style="list-style-type: none"> <li>▪ What Japanese mobile phone brands can you think of?</li> <li>▪ What Japanese brands have mobile phones that appeal to you? <ul style="list-style-type: none"> <li>— Appealing points (How are they different compared to products produced in your country or other countries besides Japan?)</li> <li>— Is there anything that stops you from purchasing Japanese products? (High price, few channels through which to purchase them, etc.)</li> </ul> </li> <li>▪ Image of Japanese-made mobile phones</li> </ul> <p>[Ask the below questions on automobile ownership only to people owning their own car or motorcycle, while asking questions on their impressions of Japanese products to all respondents.]</p> <p><input type="radio"/> What make and model of car(s) do you currently own?</p> <p><input type="radio"/> Reason for selecting currently owned car</p> <ul style="list-style-type: none"> <li>▪ Reason for selecting current car (What part appealed to you and what was better compared to other car models?) <ul style="list-style-type: none"> <li>— Are you only picky about physical characteristics like features or performance, design, etc., or did you also make your choice based on image-related preferences like status, etc.?</li> </ul> </li> <li>▪ What car models or type do you want in the future and why?</li> </ul> <p><input type="radio"/> Did you add or modify parts or features after your purchase?</p> <ul style="list-style-type: none"> <li>▪ Specific add-ons and modifications <ul style="list-style-type: none"> <li>* Assuming performance-enhancing modifications/add-ons, decoration to improve appearance, interior modifications to improve interior design, etc.</li> </ul> </li> </ul> <p><input type="radio"/> Impression of Japanese cars</p> <ul style="list-style-type: none"> <li>▪ Impression of Japanese cars</li> <li>▪ Appealing Japanese cars (make and model)</li> </ul>	<p>* To understand basic usage of mobile phones, awareness trends and preferences in each country.</p> <p>* To understand the image and potential of Japanese-made mobile phones.</p> <p>* To understand demand for mobile content in each genre.</p> <p>* To understand basic usage of owned automobiles and motorcycles, awareness trends and preferences in each country.</p> <p>*To understand the image and potential of Japanese cars.</p>

	<ul style="list-style-type: none"> <li>— Appealing points (How are they different compared to cars produced in your country or other countries besides Japan?)</li> <li>• Do the below types of cars which are commonly made in Japan these days appeal to you? <ul style="list-style-type: none"> <li>— Eco-friendly cars (Cars with extremely good fuel economy, hybrid cars powered by gasoline and electricity, electric vehicles, etc.)</li> <li>— Cars with driver assistance features (Audio route guidance, lane keep assist, emergency braking, automatic parking, etc.; Do you want to drive the vehicle yourself or have driving automated?)</li> <li>— Cars with detail-oriented design (folding side mirrors, lots of holders inside, etc.)</li> </ul> </li> </ul> <p>○ What make and model of motorcycle(s) do you currently own?</p> <p>○ Reason for selecting currently owned motorcycle</p> <ul style="list-style-type: none"> <li>• Reason for selecting current motorcycle (What part appealed to you and what was better compared to other motorcycle models?)</li> </ul> <p>○ Impression of Japanese motorcycles</p> <ul style="list-style-type: none"> <li>• Impression and appeal of Japanese-made motorcycles</li> </ul>	
<p>3. Free Time (50 min./140 min.)</p>	<p>○ Passing time after 5 p.m. and on days off</p> <ul style="list-style-type: none"> <li>• Passing time after 5 p.m. <ul style="list-style-type: none"> <li>— Who are you with and what do you do usually?</li> <li>— Why do you like to pass your time this way? We'd like to know the values that lie behind the way you pass your spare time. Same for your days off.</li> </ul> </li> <li>• Passing time on days off <ul style="list-style-type: none"> <li>— Who are you with and what do you do usually?</li> <li>— Why do you like to pass your time this way?</li> </ul> </li> </ul> <p>○ Exposure to entertainment content</p> <ul style="list-style-type: none"> <li>• Favorite entertainment genres (movies, anime, video games, music, TV, magazines)</li> <li>• About each of the 6 genres above (OK to ask only to those who like them.) <ul style="list-style-type: none"> <li>— What is the purpose? (E.g. killing time, communication tool, self-enrichment, etc.)</li> <li>— What types of works do you like? (E.g. if movies, thrillers, action, etc.)</li> <li>— What types are popular among your friends and others around you?</li> </ul> </li> </ul> <p>○ (For each genre) How much are you exposed to foreign entertainment content?</p> <ul style="list-style-type: none"> <li>• What appeals to you about it?</li> <li>• Do you know any Japanese works in this genre? If you do, what is your impression? <ul style="list-style-type: none"> <li>* Make sure to ask about their impression of Japanese movies.</li> </ul> </li> </ul> <p>○ Are there any Japanese animated characters you know of or like? (Ones respondents like)</p> <p>○ Ask whether the respondents know the below words and what their impression of them is if they do.</p> <ul style="list-style-type: none"> <li>— Akihabara</li> <li>— Otaku</li> <li>— Manga (not comics, but Japanese "manga")</li> </ul>	<p>* To understand basics of passing spare time, awareness trends and preferences in each country.</p> <p>* To understand exposure to entertainment content and preferences towards it .</p> <p>* To understand the image and potential of Japanese entertainment.</p>
<p>4. Appeal of Written Japanese (10 min./150 min.)</p>	<p>Show samples with Japanese written on them (Pom Juice, Karada Meguri-cha, Gogo no Kocho)</p> <p>○ Which countries' writing can you understand?</p> <p>○ * Does your impression change when you find out the writing is Japanese, and if so, how does it change?</p>	<p>* To understand how much people understand Japanese writing and how much it affects their impressions.</p>

## - About our Analysis -

This report is to provide a vision to help Japanese companies to enter overseas markets by showing trends and consumption patterns in the four cities of Hong Kong, Singapore, Mumbai and Bangkok based on group interviews with six-person groups of men and women (one group for each gender) in each city.

In order to effectively obtain their knowledge on this survey's topics, samples that were middle class and in their 20s or 30s were intentionally selected, with women having a high interest in fashion and men having a high interest in information content. In some cases, wealthier, upper-middle class samples were selected depending on the city in order to get groups with sustainable incomes (e.g. by including the condition that subjects own a car, etc.).

Thus, this report is at most a tentative overview of each market and we ask that you understand that it is not meant to be generally representative of these areas.