

Seikatsu Teiten 2006: New Sei-katsu-sha Structures

“Over-stretched Women, Sympathetic Men”

1. Men and women: A decade of change—Over-stretched women and sympathetic men
2. Uncovering new groupings by gender and age: Newly discovered gender and age fault lines

Hakuhodo Institute of Life and Living (HILL) has conducted its *Seikatsu Teiten* survey into *sei-katsu-sha* values and behavior biennially since 1986. HILL has just released *Seikatsu Teiten 2006*, a CD-ROM including a decade's worth of *Seikatsu Teiten* data. To herald in the launch of the CD-ROM, we present key findings from analysis of the data below.

Abstract

Segmenting *sei-katsu-sha* by gender and age is a cornerstone of traditional marketing. HILL took *Seikatsu Teiten* data collected over the past 20 years and examined it from two perspectives—gender and age—with the objective of uncovering new *sei-katsu-sha* structures.

Our first group of major findings shows that in the last decade both men and women have changed in significant but different ways, bringing changes in gender relations.

Our second group of findings, derived from the analysis of perceptions, values and behavior in four key areas—shopping, eating, free time and information-gathering—pointed out that unique fault lines and rifts exist in each of these four areas across gender and age. As a result, we were able to derive our New *Sei-katsu-sha* Structures.

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

Survey outline

Period : May 2006
Territory : Greater Tokyo area and Osaka / Kobe area
Population : Males and females aged 20–69 n=3,293
Method : Self-administered questionnaires following household visits

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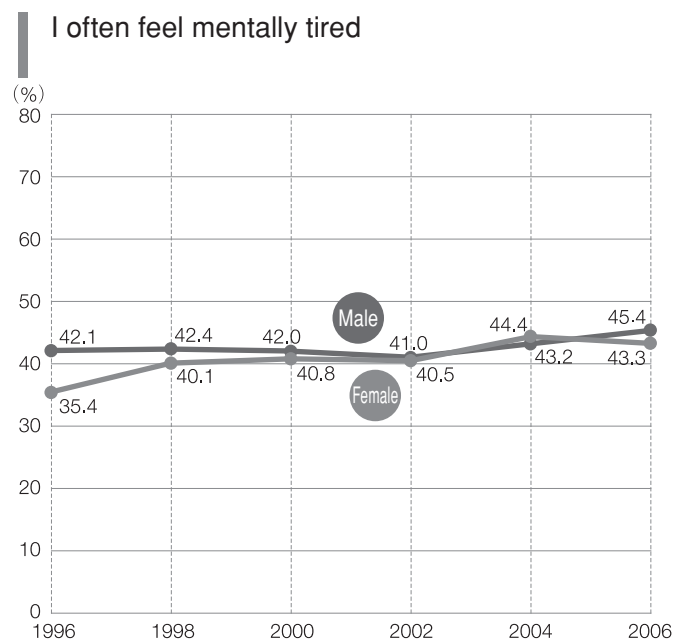
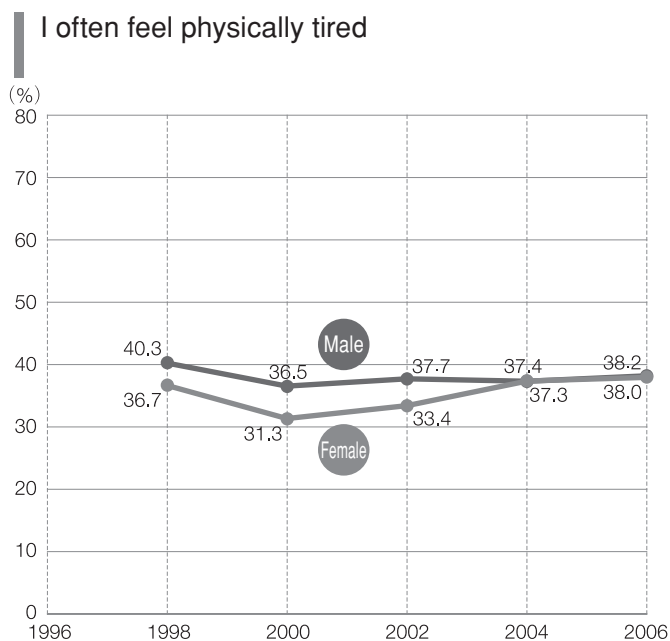
1 Men and Women: A decade of change— Over-stretched women, sympathetic men

Male-female relations have changed beyond recognition in the last decade. From old relations where one gender dominated the other, gender equality is now coming to the fore. With more women working, men and women have come to live as equals at home. It is just 20 years since the Equal Employment Opportunity Law was introduced. In that time women's participation in the workforce and earning power have continued to grow, allowing women to establish greater independence in society. Men, having caught a glimpse of women leading ever more demanding lives, have become more sympathetic and understanding. Let us take a look at just how things have changed.

Women :
A decade of change ①

Women are now as tired as men

The percentage of men who say they often feel physically tired has dropped in the last decade, while of the percentage of women who say the same has actually risen very close to the level of men. Likewise, the percentage of women who say they often feel mentally tired has risen to roughly the same level as men. The degree of physical and mental fatigue claimed by men and women has evened out in 2006.

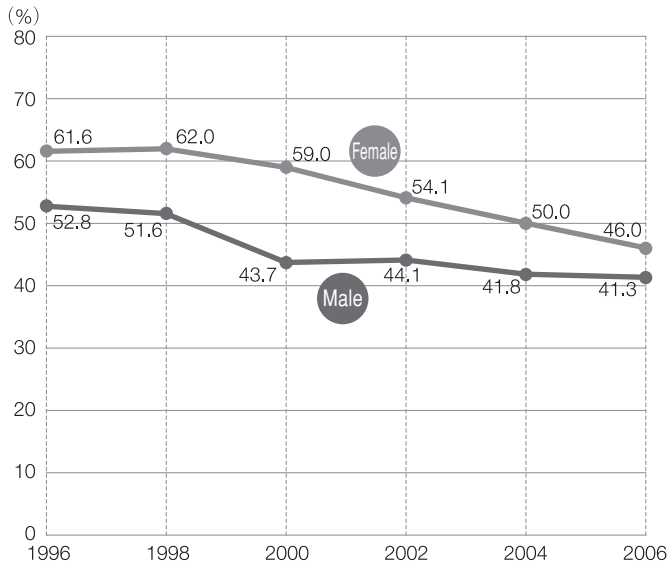


Women : A decade of change ②

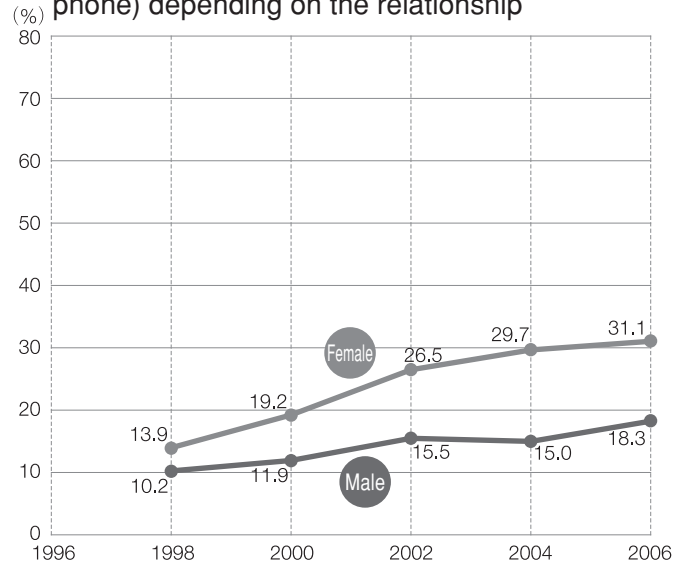
Relations with others are being reevaluated

Women have excelled at customs such as year-end and other gift giving in the past. But in 2006, just 46.0% of women give end-of-year gifts without fail, the lowest rate in ten years. Women's relationships with friends also seem to have grown a bit cooler. Compared to 1998, almost twice as many women shift between modes of communication (such as telephone, e-mail and mobile phone) depending on the relationship in 2006. The mode of communication chosen reflects the importance or the closeness of the relationship.

I give end-of-year gifts



Even among friends, I choose different modes of communication (telephone, e-mail, mobile phone) depending on the relationship

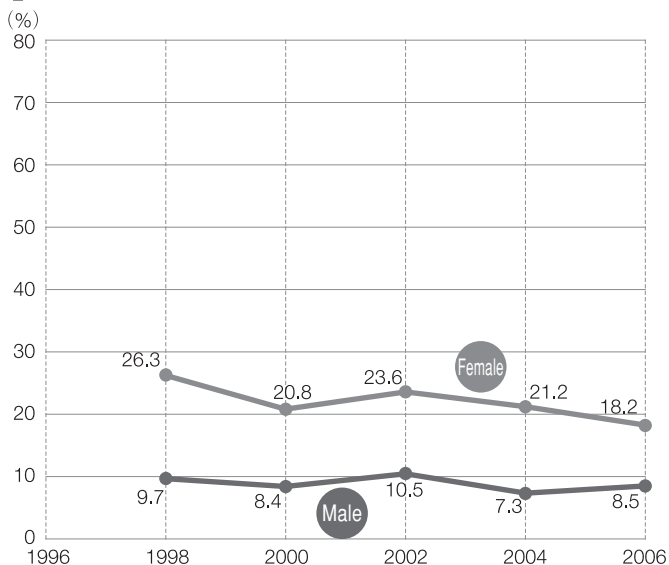


Women : A decade of change ③

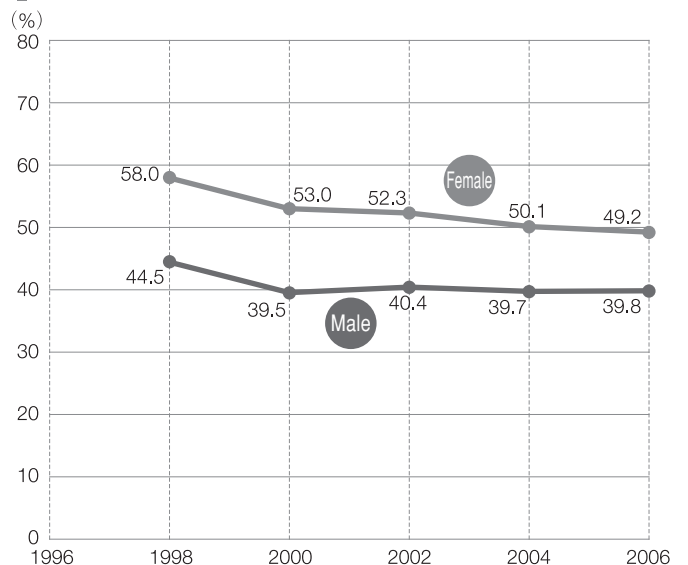
The delights of food, fashion and homemaking? Who has the time?!

The lower their available physical and mental resources, the less attention women pay to fashion and their homes. The number of women that undertake the seasonal change of furnishings, bedding and clothing, 67.7% in 1998, has dropped to 60.1%. Concern about mites, dust and mildew is also down. The number of women not particularly concerned with food, fashion and homemaking is on the rise, perhaps as a result of their having to cut corners in their domestic duties to meet the demands of work.

I worry about the foods we eat and the ingredients found in foods



I can't stand mites, dust, mildew and things like that in the house

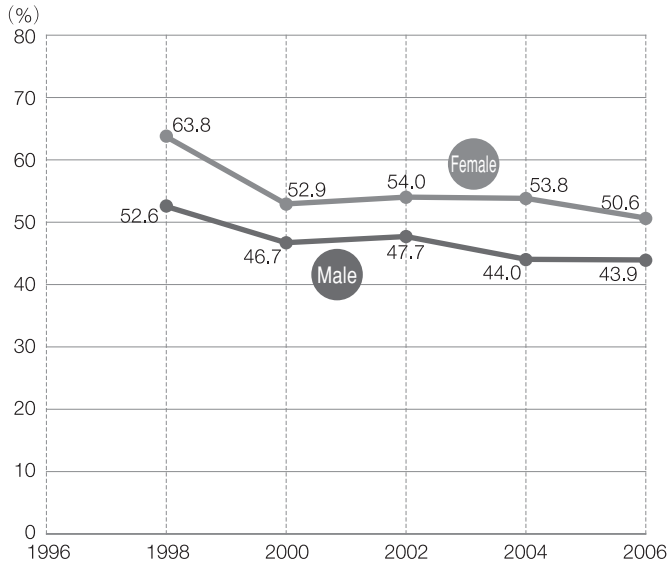


Women :
A decade of change ④

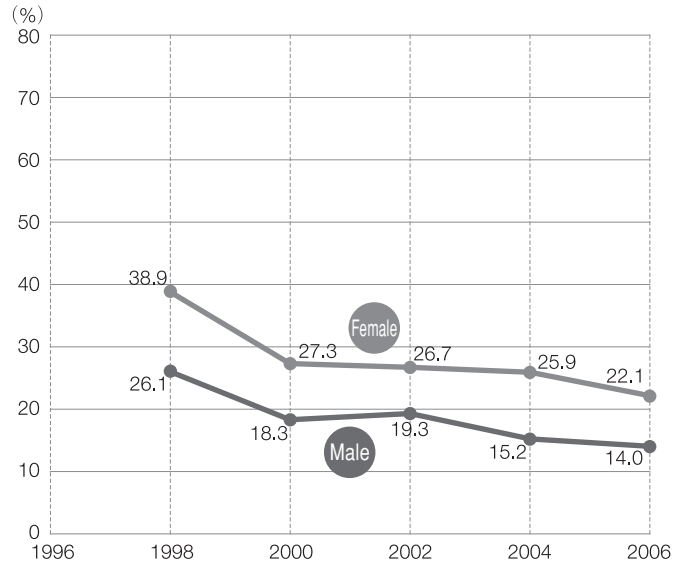
What was that about looking after your health and the environment?

While 63.8% of women always wanted to know what was happening when it came to their physical condition a decade ago, just 50.6% do so today. Close to half of women are indifferent even to the very foundations of life, their health. Moreover, while there is greater concern about the environment in the public sphere, there has been a huge drop in the numbers of women worried about air and water quality.

I always want to know what is happening when it comes to my physical condition



I worry about the quality of the air and water

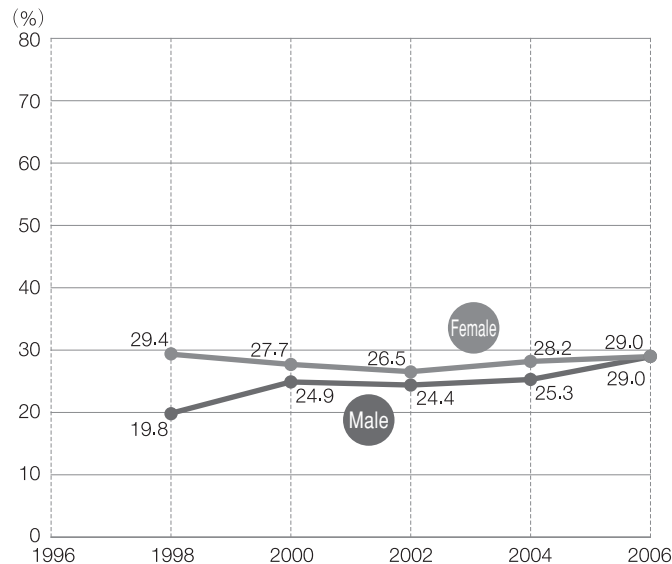


Men :
A decade of change ①

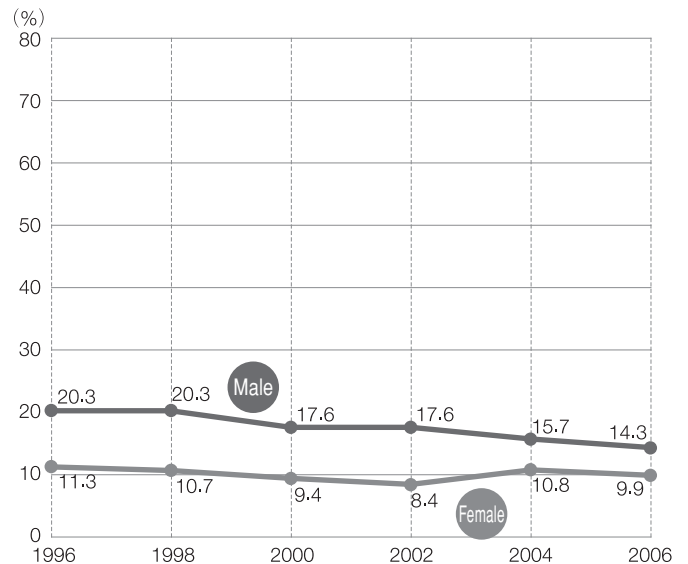
Men now seem to understand women's feelings better

While women have changed rapidly, men's feelings have changed incrementally to closer resemble those of women. A decade ago 19.8% of men and 29.4% of women wanted to eat at high-class restaurants where meals cost more than 10,000 yen per person. Today, the rates for men and women are an identical 29.0%, the figure for men having jumped close to 10 points. The number of men who do not mind taking trips overseas alone is the lowest in 10 years, indicating that men are now coming closer to women's aversion to solo trips abroad.

I want to eat at high-class restaurants where meals cost more than 10,000 yen per person



I don't mind taking trips overseas alone

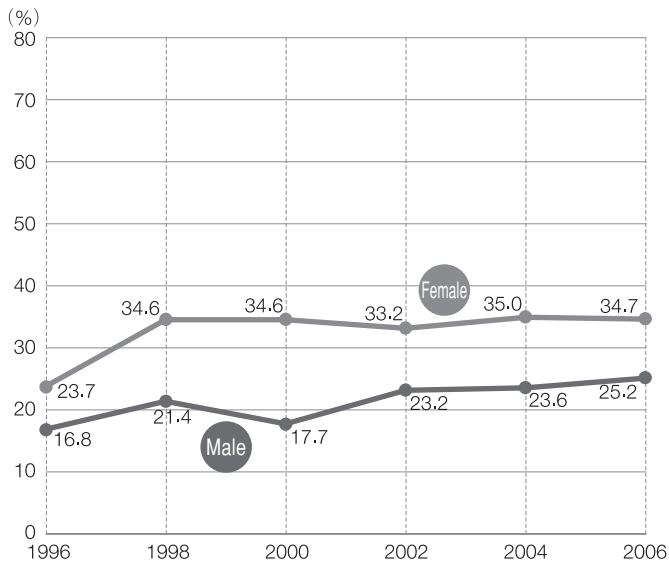


Men : A decade of change ②

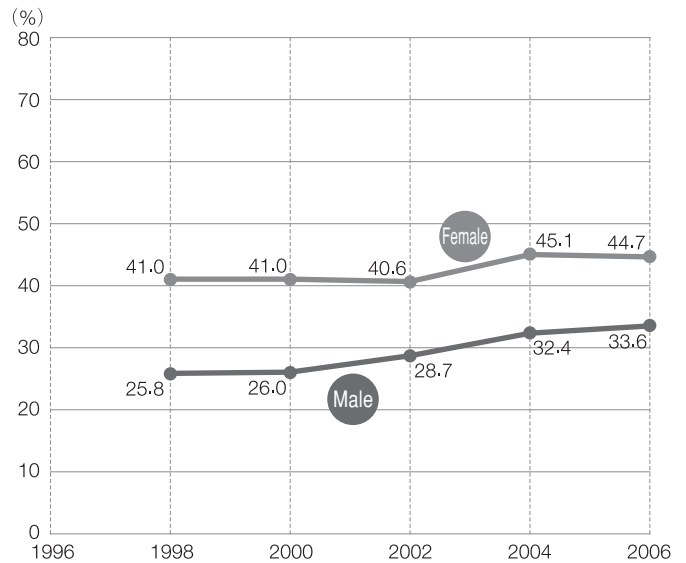
Men now want to pay more attention to the family

The finding most indicative of the changes in men was the increase in the number of men who show an understanding of and cooperate with child rearing and housekeeping duties. Men's awareness of shared responsibility at home is particularly strong, with a highest-ever 25.2% of men saying husbands as well should give priority to housework and child rearing (compared with 16.8% a decade ago). Additionally, the number of men who think men, too, should have time off to take care of their new-born babies has risen from 25.8% 10 years ago to 33.6% in 2006. More than a third of men now support paternity leave. Elsewhere, when we asked whether they give Father's Day and Mother's Day gifts, the figures for women were stable, while those for men were up on both counts, hinting that more men may now remember to express their thanks to both their parents.

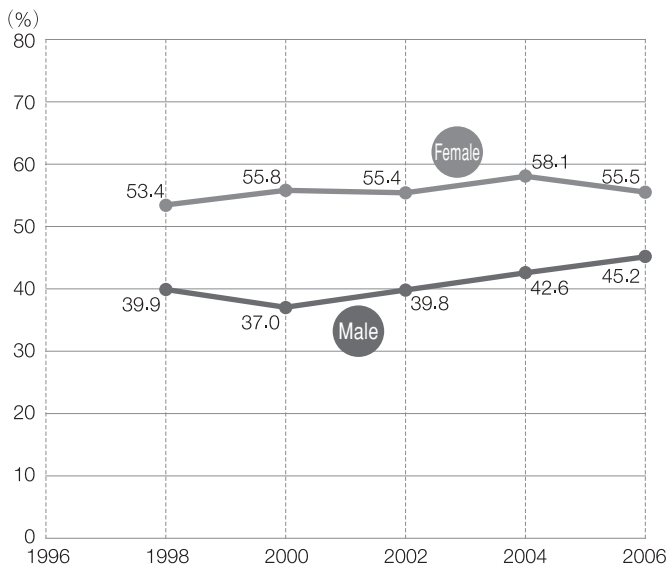
Husbands also should give priority to housework and to child rearing



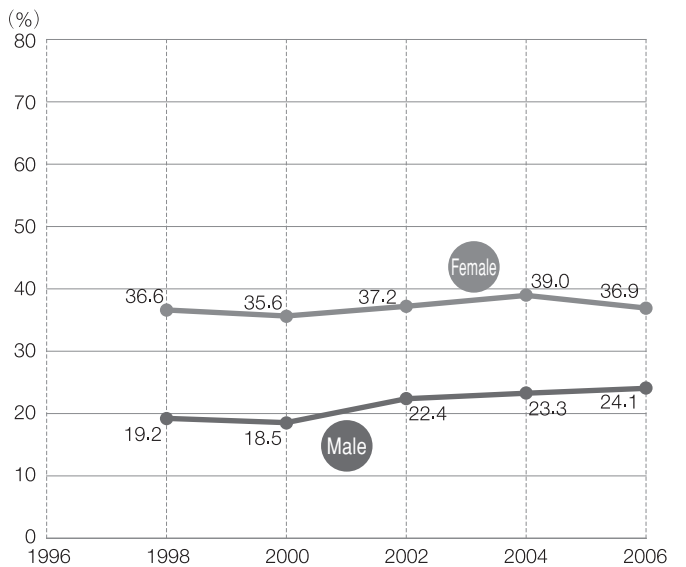
Men also should have time-off to take care of their new-born babies



Giving gifts: On Father's Day



Giving gifts: On Mother's Day

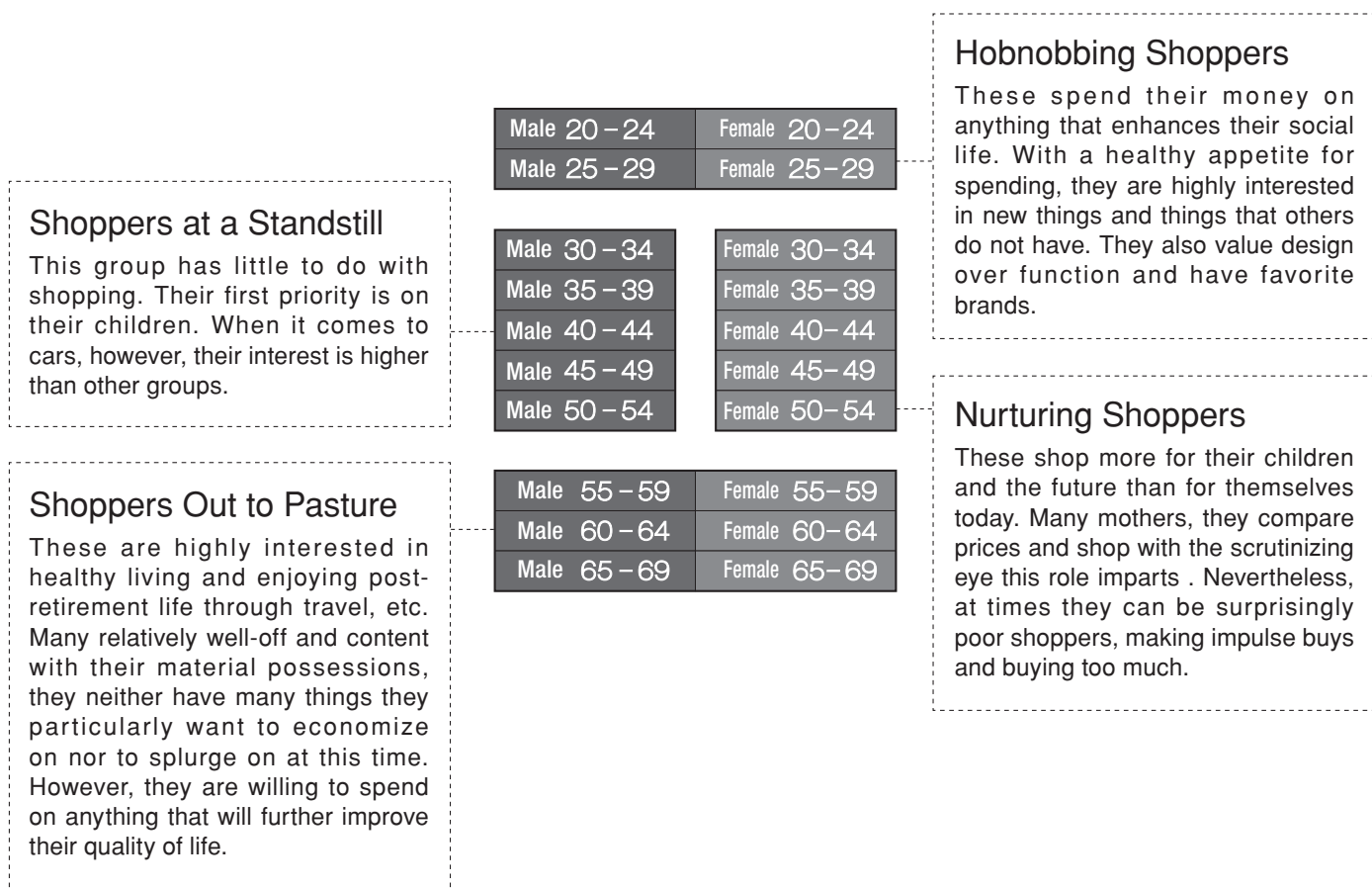


2 Gender and age fault lines and the new *sei-katsu-sha* structures

Our second group of findings derived from analysis of perceptions, values and behavior in four key areas—shopping, eating, free time and information-gathering— across gender and age. By rejecting the assumption traditional analyses make that generation-specific characteristics exist in all spheres of daily life, we tried to identify unique fault lines and rifts that may exist in each of these four areas across gender and age.

① Four Shopping Lifestyles

Analyzing responses to questions on how people spend money, how they shop and their product and brand preferences, we discovered four distinct groups: men and women aged 20–29 are Hobnobbing Shoppers, women aged 30–54 Nurturing Shoppers, men aged 30–54 Shoppers at a Standstill and men aged 55–69 Shoppers Out to Pasture



② Four Dietary Lifestyles

We analyzed responses to questions on food preferences, alcohol consumption and dining preferences and discovered four major groups. We found that men aged 20–39 are Grab-a-Quick-Biters, women aged 20–54 Beauty-Conscious Gourmets, men 40–69 After-Dark Drinkers and women aged 55–69 Traditional Diet Eaters.

Grab-a-Quick-Biters

These just want to chow down on quick, easy food out of the home. They prefer ramen noodles, yakiniku Korean BBQ and other fatty foods. Their favorite drinks are beer and Happoushu.

Male 20 – 24
Male 25 – 29
Male 30 – 34
Male 35 – 39

Male 40 – 44
Male 45 – 49
Male 50 – 54
Male 55 – 59
Male 60 – 64
Male 65 – 69

Female 20 – 24
Female 25 – 29
Female 30 – 34
Female 35 – 39
Female 40 – 44
Female 45 – 49
Female 50 – 54

Female 55 – 59
Female 60 – 64
Female 65 – 69

Beauty-Conscious Gourmets

This group exhibits a pronounced preference for salad, pasta and other Western foods with wine and cocktails which they like to savor in elegant surroundings and at home they try to pay attention to the dishes and table settings. They look for food that will keep them beautiful and healthy.

After-Dark Drinkers

These have many wining-and-dining opportunities but really just want to eat at home. Alcohol is a given, and they are especially fond of Japanese sake and shochu distilled spirit.

Traditional Diet Eaters

The most diet-conscious group, these prefer—and actually eat—traditional Japanese cooking and healthy food.

③ Four Leisure Lifestyles

Our analysis of responses to questions on ways people spend their free-time, what hobbies they have and how they travel revealed four groups. Men aged 20–29 are Youthful Pleasure-Seekers, women aged 20–44 Shopaholics, women aged 45–69 Slow-Leisure Lovers and men aged 30–69 Those of Few Interests.

Youthful Pleasure Seekers

Enjoying a host of different pursuits from sports to movies, this group is making the most of its youth. Having fun is a big priority, and a sense of achievement the ultimate goal. In pursuing hobbies, they are particular about attires and gears.

Male 20 – 24
Male 25 – 29

Male 30 – 34
Male 35 – 39
Male 40 – 44

Male 45 – 49
Male 50 – 54
Male 55 – 59
Male 60 – 64
Male 65 – 69

Female 20 – 24
Female 25 – 29
Female 30 – 34
Female 35 – 39
Female 40 – 44

Female 45 – 49
Female 50 – 54
Female 55 – 59
Female 60 – 64
Female 65 – 69

Shopaholics

For these, free time means shopping. They shop, go to the movies, try out various restaurants and lead a thoroughly urban leisure lifestyle.

Those of Few Interests

Aside from gambling on the horses, pachinko (Japanese pinball), go for a drive and golfing, these have few real interests and an underdeveloped desire for a wide variety leisure activities.

Slow-Leisure Lovers

These want to take their time and enjoy their leisure time by themselves. Art museums, the theater, handcrafts, gardening—their preferred pursuits, whether passive or active, are creative and artistic.

④ Four Information-Gathering Lifestyles

Analyzing responses to questions on ownership of IT gadgets, use of information services, use of media, and methods of receiving/passing on information, we again identified four key groups. Men aged 20–24 and women aged 20–29 are Information Junkies, women aged 30–49 Nearest and Dearest Dependent, men aged 60–69 and women aged 50–69 Information Conservatives, and men aged 25–29 Information- Pressured.

Information Junkies

For as long as they can remember they have been surrounded by IT gadgetry, and they are living their salad days making the most of all that their mobile phones and computers have to offer. The information-rich life is simply a fact of life, and they are so highly information-dependent they cannot bear to be without their mobile phones. Yet they also feel uneasy in this age of information saturation.

Information-Pressured

This group works under pressure at jobs that require them to be able to handle information at high speed and manipulate ever evolving IT gadgets. They must always reach for quality, real time information. They try to gather information offered both by mass media and over the Internet.

Male 20 – 24	Female 20 – 24
	Female 25 – 29
Male 25 – 29	
Male 30 – 34	Female 30 – 34
Male 35 – 39	Female 35 – 39
Male 40 – 44	Female 40 – 44
Male 45 – 49	Female 45 – 49
Male 50 – 54	
Male 55 – 59	Female 50 – 54
	Female 55 – 59
Male 60 – 64	Female 60 – 64
Male 65 – 69	Female 65 – 69

Nearest and Dearest Dependents

First accessing the Internet using mobile phones and began using computers after entering the workforce, this group had only tenuous connections with IT. The most popular utility they found of the Internet is on-line shopping. Interest in social network services is still relatively low at this moment. Placing priority on their friends, family and word-of-mouth, this group also has relatively little contact with the mass media.

Information Conservatives

These have little contact with IT, but do have high rates of contact with newspapers, magazines and other mass media—sources of information in which they have a high degree of confidence.

About HakuHodo Institute of Life and Living

The HakuHodo Institute of Life and Living (HILL) is a think-tank established by HakuHodo Inc. in 1981. HILL conducts research primarily on the emerging social trends and the lifestyles of people today. It is the only institute of its kind that conducts research into the experiences of the people beyond their consumption behavior and social orientations. HILL stands for the idea of *sei-katsu-sha* which means people who live their own life and it encompasses not only the economic aspect as consumers but also socio-psychological and political aspects of an individual.

About HakuHodo Inc.

Founded in 1895, HakuHodo Inc. (www.hakuHodo.jp) is the second largest advertising company in Japan, and the tenth largest core agency in the world according to Advertising Age's agency report 2006. Today, innovation and creativity are still at the heart of its operations. HakuHodo shares with its clients an unmatched depth of knowledge about the relationship between people and brands – knowledge that has grown from the concept of *sei-katsu-sha* (“consumers with a heartbeat”) which HakuHodo pioneered in advertising. Through its global network, HakuHodo provides comprehensive marketing and communications services and solutions for some of the best-known brands in the world. HakuHodo has 64 offices in 16 countries/regions, and approximately 5,000 employees.

Sei-katsu-sha insight is the foundation for HakuHodo's thinking, planning, and brand building. It reminds us that consumers are more than shoppers performing an economic function. They have heartbeats. They are individuals with distinct lifestyles. HakuHodo introduced this term in the 1980s to emphasize our commitment to a comprehensive, 360-degree perspective on consumers' lives.

HakuHodo is one of three advertising agencies under the umbrella of HakuHodo DY Holdings Inc. (TSE: 2433) (<http://www.hakuHodody-holdings.co.jp/english/index.html>) a holding company which was established in 2003 through the management integration of HakuHodo Inc., Daiko Advertising Inc. and Yomiko Advertising Inc. HakuHodo DY Holdings Inc. was listed on the first section of Tokyo Stock Exchange in 2005.