Synovate PAX reveals new affluent consumer audiences across Asia

Contributed by Synovate
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HONG KONG â€" Synovate, a leading global market intelligence company, today shed new light on consumers across Asia Pacific, revealing distinct groups of like-minded and affluent audiences.

Clare Lui, Associate Director of media research for Synovate, said the distinct consumer groups emerged from the first-ever segmentation analysis performed on the long-running PAX media survey.

"As always, the Synovate PAX 2007 results have shown large regional media audiences, eager to spend and ready for the latest and greatest. Advertising and media specialists can cut the information in a variety of ways to get a comprehensive guide to decisions on the right media mix for reaching the right group of consumers.

"PAX is a data-rich survey. We uncover details on everything from media consumption to attitudes on brands, international outlook, lifestyle choices and product ownership. Marketers can use this information to define clear-cut, actionable consumer segments to target their efforts.

"For example, a marketing director may need to reach lifestyle-focused, well-educated consumers. The new Work to Live's group revealed by Synovate PAX becomes a logical place to start," she said.

Who's who in affluent Asia Pacific? The Synovate PAX consumer segments

PAX respondents across Asia Pacific can be segmented into five clear groups, each with differing attitudes, media and product consumption patterns. This analysis is based on 10 markets across the region - Hong Kong, Singapore, Korea, Taiwan, Thailand, Malaysia, Indonesia, India, the Philippines and Australia.

The Work to Live's

Lifestyle-oriented, green and socially aware - 28% of affluent Asians

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- Successful, well-educated and affluent, this group is arguably the best at achieving a work-life balance. These people work to live, not live to work.
- Most likely to be aged 45 plus, these people are Business Decision Makers and 27% of them have a post-graduate degree. They are more likely to be found in lifestyle-oriented Australia, as well as India and Seoul.
- While still very much privileged consumers, the Work to Live's have a lower ownership of household and personal products compared to their acquisitive counterparts from other segments across the PAX audience.
- This group is more likely to be environmentally aware and socially conscious than the other segments. Sixty percent of them passionately care about environmental protection versus an average of 44%. Sixty eight percent of them strongly believe it is important to contribute to society, versus an average of 47% across affluent Asians. And they treasure spending time with family and friends with 74% strongly agreeing this is important, versus an average of 62%.
- The Work to Live's have lower than average television viewing, whether local or regional, but a higher than average readership of regional newspapers.
- This does not mean they are uninformed! Information is important to them with 29% strongly agreeing they like to be informed and up-to-date, versus a regional average of 23%, and 36% pride themselves on their international perspective, versus a regional average of 32%.
- And what better way to spend time with family and friends than sharing sport? They are some of the biggest fans of football, cricket and tennis across the region, either playing or watching it regularly.

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The HUMmers (Hungry, Urban and Mobile)

Screen-dependent, striving and relentlessly positive - 15% of affluent Asians

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- Young, hungry, career-driven, urban, mobile and upbeat... the HUMmers segment is hard to stop. They are always

striving for the top, very positive about life, very well-educated and constantly in touch via mobiles, laptops, PDAs, whatever it takes.
- More often found in developing markets like India, Manila and Jakarta, these 25-34 year olds don't yet own too much, but if it's convenient and represents a fast-track to the top, they'll own it soon!
- They have a high intention to purchase household products, personal products, accessories and leather, with 17% stating their intent to buy a laptop, while 15% plan to purchase a mobile phone with internet access in the next year.
- Thirty two percent of this group have post-graduate degrees and, at this stage, their incomes are among the lowest in the PAX universe. It seems they are intent on changing that though, with 68% strongly agreeing that they would put in extra effort in order to meet career goals, versus a regional average of 38%.
- They are also more likely to be one of the first to buy a new product or gadget.
- This is a very visual group, with higher than average pay TV viewership, especially the regional channels. They are less likely to read print to access their information.
- Continuing with the visual and mobile theme, the HUMmers also show high ownership of portable personal digital devices, and high usage of MMS, mobile internet, music on the move and accessing email via their mobile device.
- Looking good is clearly important to the HUMmers as they spend more than all the other groups on cosmetics, perfumes and / or cologne, spending an average of US$78 a month on these products.
- When it comes to sport, they favour tennis and cricket.

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The Luxury Loyalists

Comfortable, conservative and wealthy - 12% of affluent Asians

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- This is a very clear and valuable segment in the PAX world, although not a new one for marketers. Nonetheless, the insights offered by this segmentation analysis allow marketers to better understand ways to reach these Luxury Loyalists.
- Nearly half of this segment is aged 45 or older. While strongly skewed towards women (57%), there are also men in this group that share similar attitudes and consumption patterns. Two thirds of people in this segment are married with children and they tend to not work.
- Though coming from affluent households, these people do not own much in the way of household or personal products like laptops, mobiles with internet access or digital cameras and video recorders - compared to other segments.
- However, they have a very high ownership of luxury products like jewellery, watches, designer footwear, leather and accessories. Interestingly, if they do go for technology, it tends to be from the 'luxury' end of the technology spectrum... this group has the second highest likelihood to own a professional quality digital camera.
- There's more where that came from. This group also has a relatively high intention to purchase more luxury goods. Over the next twelve months, 7% intend to buy jewellery, 7% a watch and 6% accessories.
- A word of caution for marketers trying to break into this segment... this group is the least likely of all the PAX segments to consider new brands and also the most likely to strongly agree that they do not want to be leaders. As stated 'followers', marketers will need to work hard to attain and then build on brand loyalty.

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The Gimme's

Fashion-conscious, acquisitive and privileged - 25% of affluent Asians

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- It's all about me, me, me. Similarly aged to the HUMmers segment, this group of people has an entirely different focus in life. Aged largely 25-34, they are from developed, urban areas like Hong Kong, Singapore, Kuala Lumpur and Seoul, and are very focused on their privileged world. They are skewed towards female.
- With high internet penetration, high terrestrial TV viewership and a higher likelihood to view content on their mobile phone, the Gimme's are very visually oriented.
- They enjoy the second highest average household income of the segments and their money clearly goes on living a luxurious lifestyle.
- With higher than average leisure travel and little interest in sporting pursuits, this group is focused on fashion. They have the highest levels of ownership of luxury products, specifically designer clothing, accessories, leather products and jewellery. But they want more! They also have the highest intention to purchase these products in the coming year, with 11% intent on purchasing designer clothes and leather goods (US$200 per item), 8% in the market for accessories (US$200 per item), 8% on the hunt for jewellery (US$500 per item) and 6% set to buy a watch of US$500 or higher value.
- Inwardly focused, only 5% of the Gimme's strongly agree that they enjoy being up-to-date with information (versus a regional average of 23%) and 12% agree that an international outlook is important to them (versus an average of 32%).

- They are also the least likely to care about environmental protection with only 12% strongly agreeing that it is important, versus a regional average of 44%. A paltry 13% strongly agree that it is important for citizens to contribute to society, whereas an average of 47% thought this was important across Asia Pacific.

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The Executive Warriors

International, quality-conscious and on-the-move - 21% of affluent Asians

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- The Executive Warriors are typically top income earners, found in large companies (37% are in companies of 300 or more people), are skewed towards male and mostly found in Taipei, Singapore, Hong Kong and Bangkok.
- The majority of them work full-time, are well-educated and have the highest ownership of all the segments when it comes to household and personal products.
- They are connected, work hard and play hard.
- - they have the highest internet penetration
- - 24% have taken more than one business trip in the past twelve months and 11% have taken three or more
- - 46% have taken more than one leisure trip in the past twelve months and 11% have taken three or more
- Perhaps not surprisingly, they value international perspective (47% strongly agree versus a regional average of 32%) and find regional media to be more insightful (19% strongly agree, versus 11%).
- They are also more interested than average to find out more about the culture of other countries (45% versus 30% strongly agree).
- On the move for business, the Executive Warriors need to stay current. They have a high viewership of television, especially cable and satellite, and are also very likely to view TV content on their computer (34% do this, versus 25%). They have high readership levels for regional print media as well.
- They access all this information via their high ownership of devices like PDAs, hybrid mobile phones and tend to utilise many of their features like sending emails and SMS's via their mobile devices.
- Thirty nine percent of these Executive Warriors strongly believe paying extra for quality is worthwhile (versus 28%) and 52% are willing to put in extra effort to meet career goals (versus 38%).
- Executive Warriors wind down by watching or playing golf, football, cricket, baseball and / or basketball. They are also the biggest wine drinkers, with around a third of them having consumed wine in the past month.

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A fact sheet about Hong Kong's elite consumers is also available. Please email Pia Wong should you require a copy.