

opensurvey

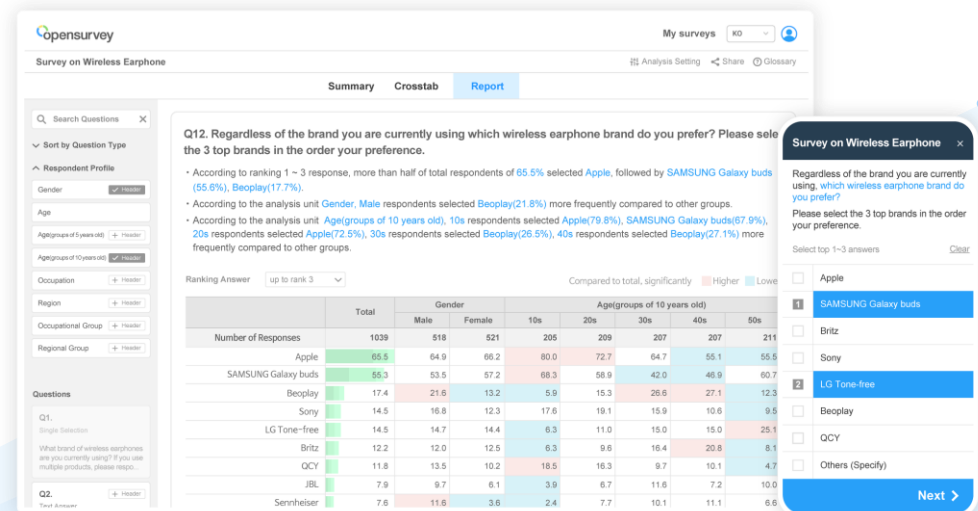
How Asian consumers shop today

아시아 11개국 소비자 조사

- A mobile research in 11 Asian countries

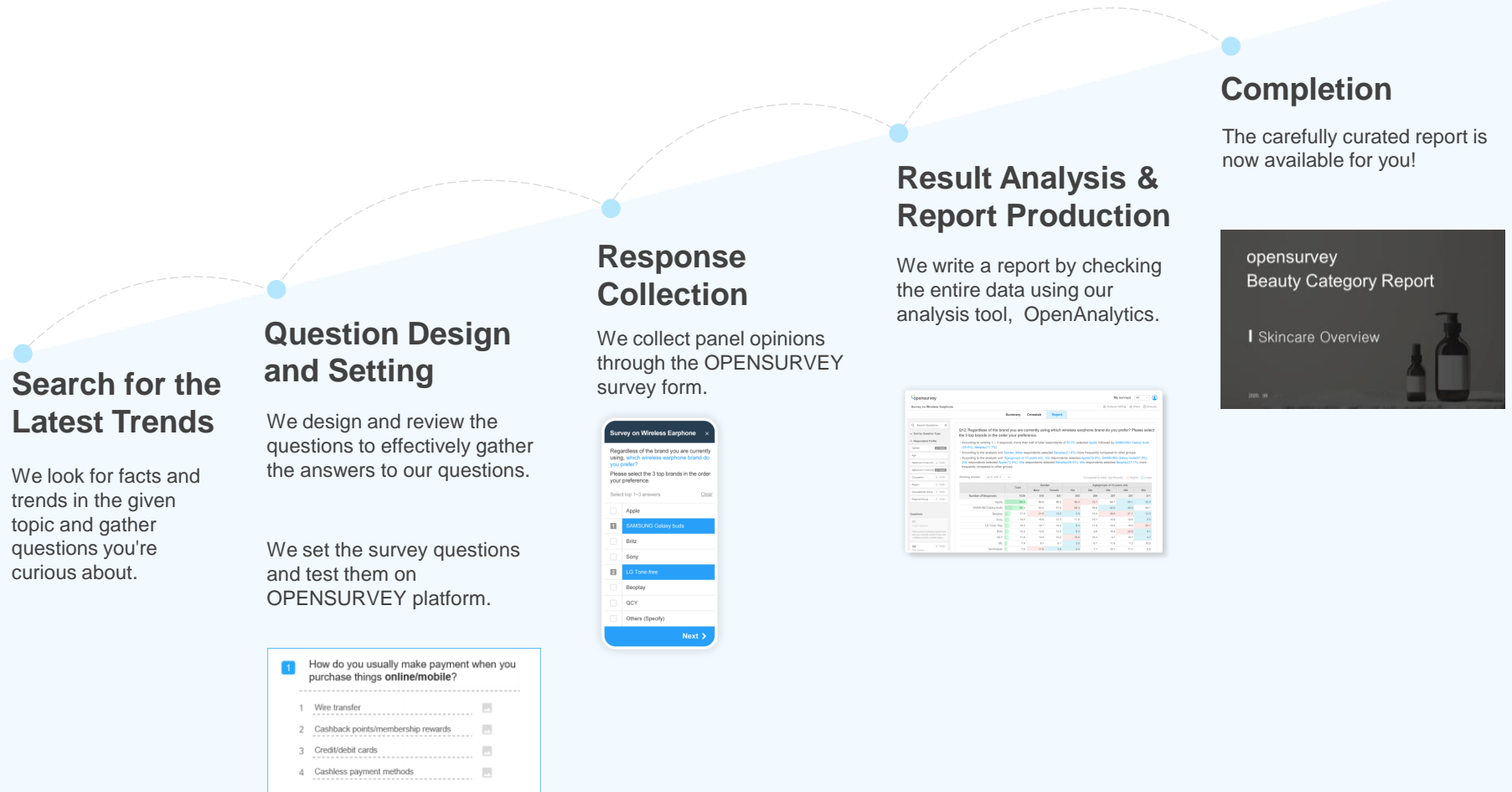
OPENSURVEY is a mobile research innovator in Korea

- Business in operation since 2011
- Serving 1,400+ corporate clients in and outside of Korea
- Collecting 400K+ survey responses per month
- Owns no. 1 survey app in Korea, OVEY



This report compares how different Asians live and shop today.

This is how the report was produced:



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2. Price sensitivity

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Part 5. **Digital adoption**

1. Shopping platform
2. Cashless payment service

We conducted a mobile research in 11 Asian countries to understand and compare general characteristics of mobile research respondents.

본 조사는 아시아 주요 11개국 모바일 리서치 응답자의 기본적인 특성을 파악하고 비교하기 위해 진행되었으며, 아래와 같이 설계되었습니다.



Research objectives

- To understand and compare general characteristics of mobile research respondents in Asian countries

Research methodology

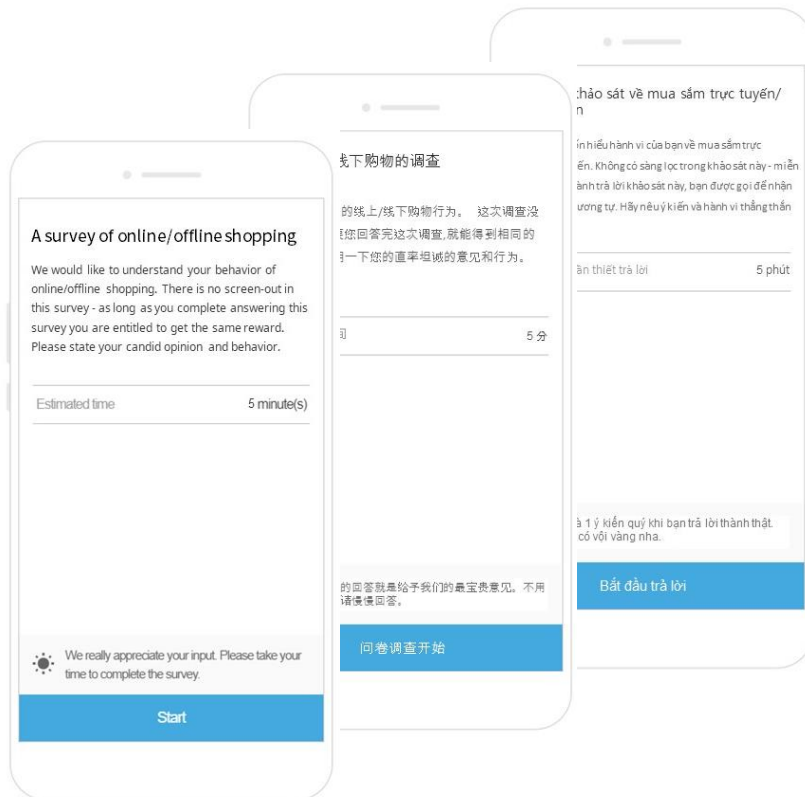
- Mobile research
 - Survey invitations sent via email
 - When the respondents click the survey link from a mobile device, he/she is allowed to start answering the survey

Sampling

- 20-49 general population in 11 Asian countries
- Nationally representative sampling against gender, age and marital status in each country
- No income cut-off applied
- N=500 per country

Fieldwork

- July 2020



**We took nationally representative sample against gender and age in each country.
Compared to Korea and Japan, China has a younger population with a high marriage rate.**

국가별로 연령과 성별, 결혼 여부에 대한 대표표본을 구성하여 조사를 진행했습니다.
한국과 일본 대비 중국은 젊은 연령이 많으며 기혼의 비율이 월등히 높습니다.



Gender

% of total



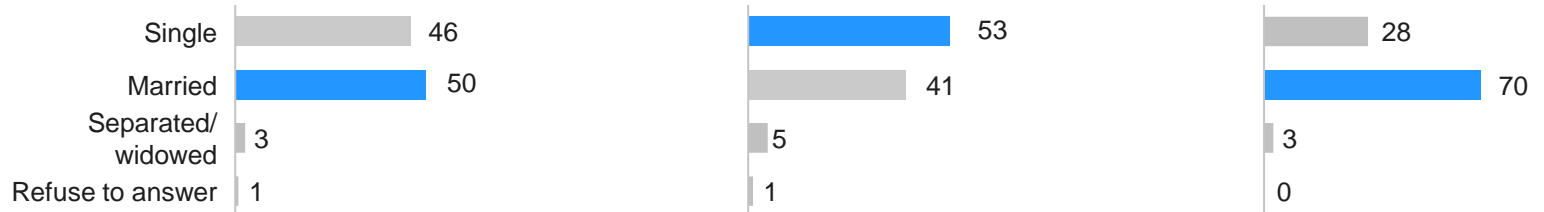
Age

% of total



Marital status

% of total



Taiwan has the biggest number of single household. Malaysia has a similar age composition to SE Asian countries and higher marriage rate.

대만은 아시아 주요국 중 미혼의 비율이 가장 높습니다.

반면 말레이시아는 기혼의 비율이 미혼 대비 월등히 높으며, 연령 구성은 동남아 국가들과 비슷합니다.



Taiwan
N=507



Hong Kong
N=510



Singapore
N=508



Malaysia
N=506

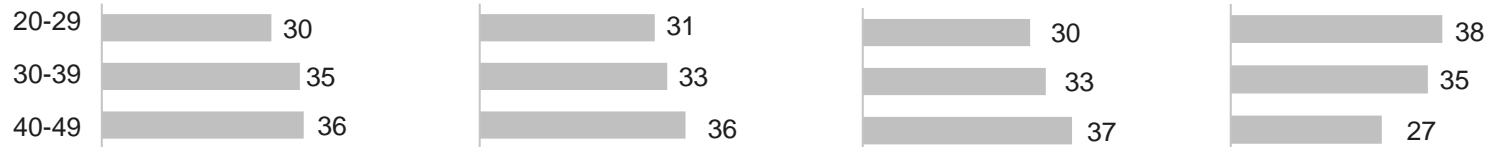
Gender

% of total



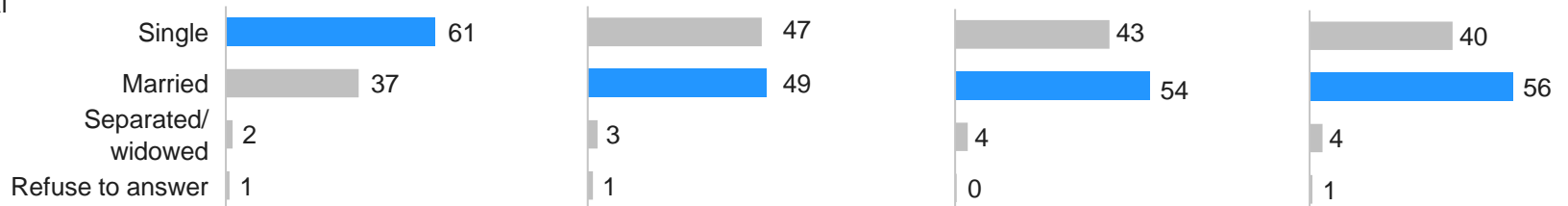
Age

% of total



Marital status

% of total



Thailand shows the highest distribution in 40-49 age. Philippines and Thailand have a high percentage of singles, and Indonesia and Vietnam show the opposite.

태국은 타 동남아 국가 대비 40-49세 인구가 많습니다.
필리핀과 태국은 미혼의 비율이 높은 반면, 인도네시아와 베트남은 기혼의 비율이 높습니다.



Philippines
N=508



Indonesia
N=504



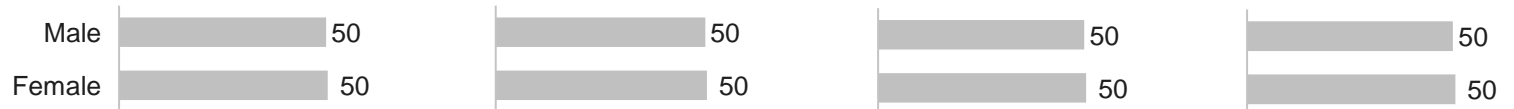
Vietnam
N=504



Thailand
N=509

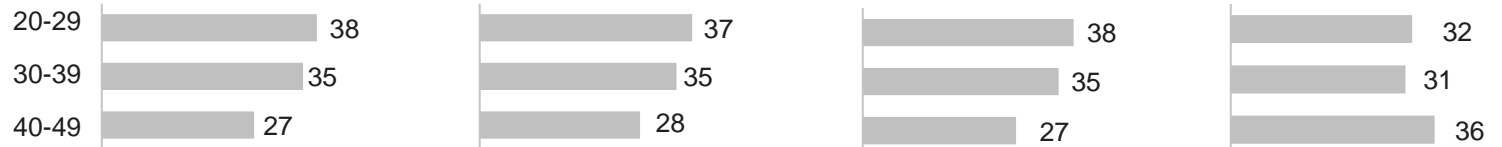
Gender

% of total



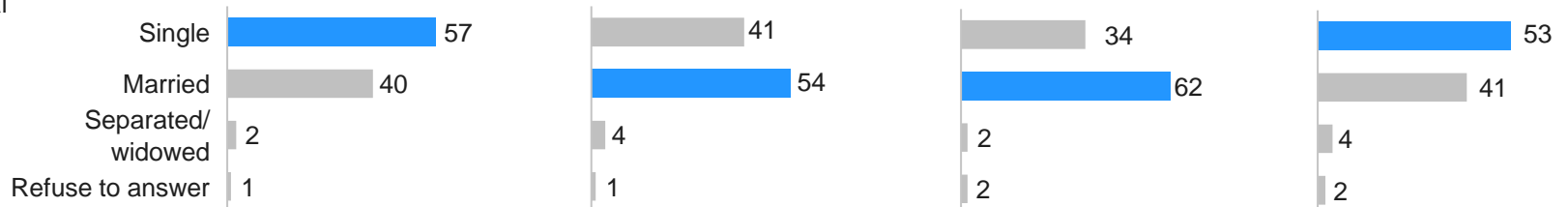
Age

% of total



Marital status

% of total



Chinese mobile survey respondents are skewed towards much higher income compared to Korean and Japanese respondents.

중국 모바일 리서치 응답자의 소득 수준은 평균 국민 소득 보다 월등히 높습니다.



Korea
N=500

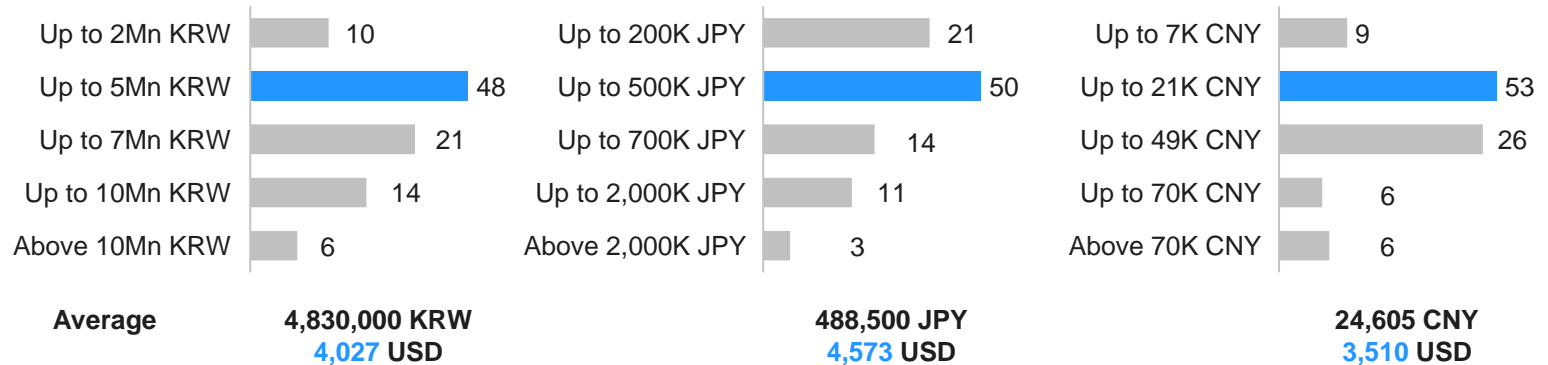


Japan
N=505



China
N=518

Monthly household income % of total



GNI per capita¹ (\$PPP)

Average	Korea	Japan	China
	23,380 USD	38,520 USD	8,690 USD

Hong Kong respondents have the highest household income among Asia. Singaporean mobile respondents' income levels are lower than the national average income.

홍콩의 모바일 리서치 응답자의 평균 소득은 아시아 주요 국가에서 가장 높습니다.
반면, 싱가포르 모바일 리서치 응답자의 소득 수준은 국민 평균 소득에 비해 낮습니다.



Taiwan
N=507

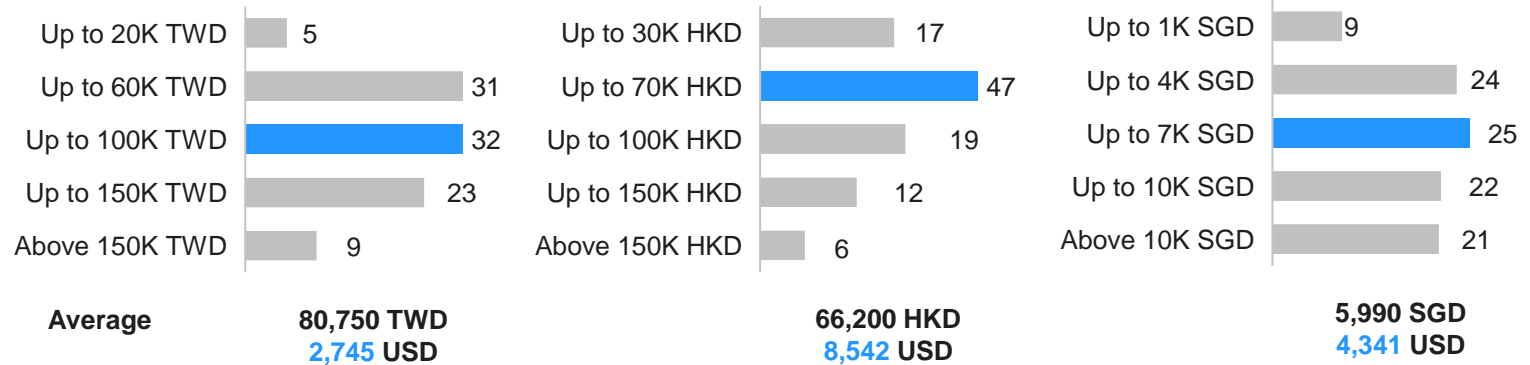


Hong Kong
N=510



Singapore
N=508

Monthly household income % of total



GNI per capita¹ (\$PPP)

Region	Average
Taiwan	24,318 USD
Hong Kong	46,310 USD
Singapore	54,530 USD

Vietnamese mobile survey respondents have much higher income compared to the national average income as well as its peers in SE Asia.

베트남 모바일 리서치 응답자의 소득 수준은 국민 평균 소득 보다 월등히 높으며, 동남아 국가에서 가장 높습니다.

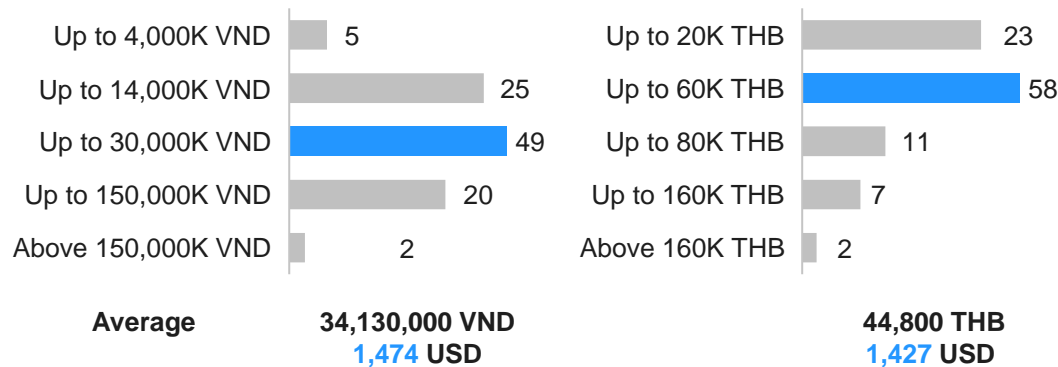


Vietnam
N=504



Thailand
N=509

Monthly household income % of total



GNI per capita¹ (\$PPP)

Average	2,160 USD	5,950 USD
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Part 5. **Digital adoption**

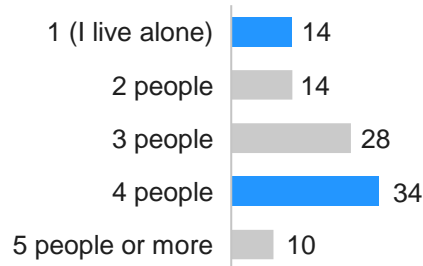
1. Shopping platform
2. Cashless payment service

More than half of Chinese households have 3 people whereas more than 20% of households are single households in Japan.

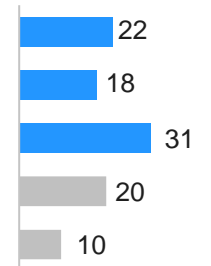
한 자녀 정책으로 인해 중국은 3인 가구의 비율이 월등히 높으며, 일본은 1인 가구 비율이 주요 아시아 국가 중 가장 높습니다.



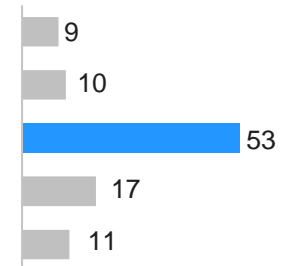
Household size % of total



Average **3.1 people**

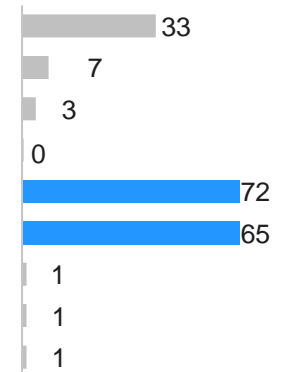
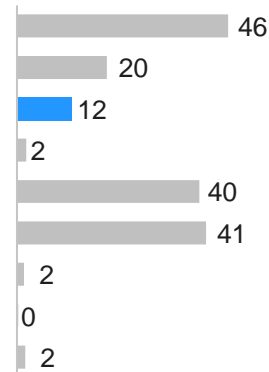
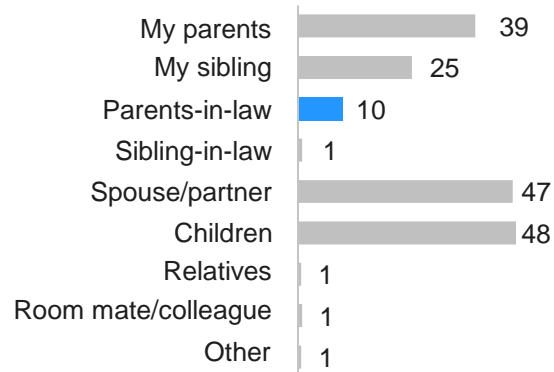


Average **2.8 people**



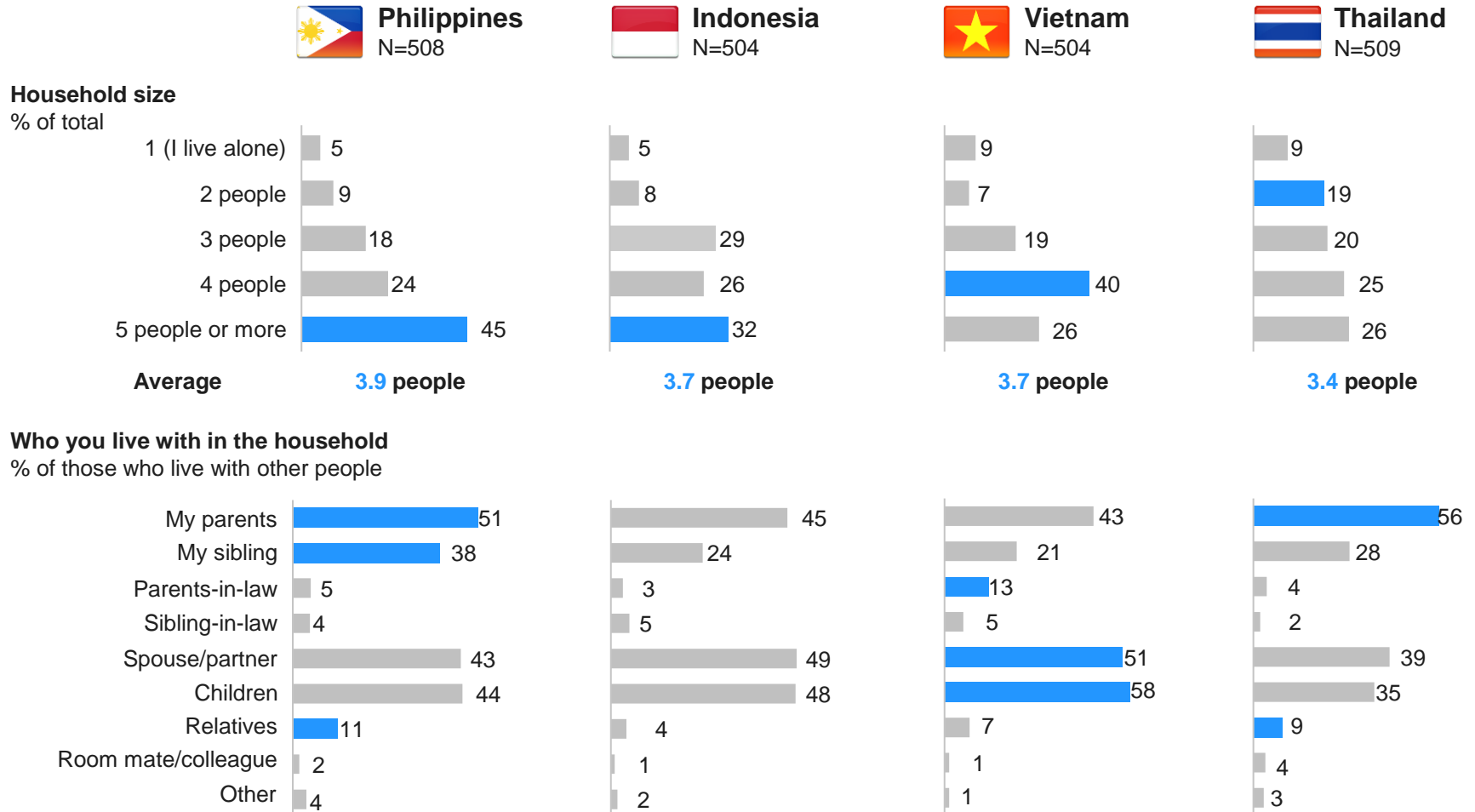
Average **3.1 people**

Who you live with in the household % of those who live with other people



In the Philippines, even more households have more than 5 members. The bigger the household size, the more they live with extended families.

아시아 주요 국가에서 필리핀의 가족 구성원이 가장 많습니다. 가족 구성원이 많을 수록 배우자 및 자녀 이외의 가족(사촌, 조카 등)과 함께 사는 비율이 높습니다.



The average number of children in Asian countries is 1.5. Because of the one-child policy, majority of families have one child in China.

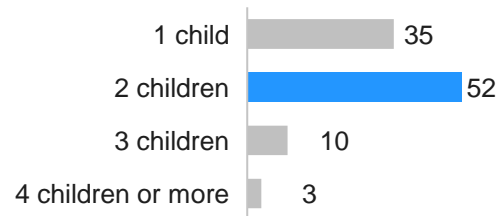
아시아 주요 국가의 응답자는 평균 1.5명의 자녀가 있습니다. 한편, 중국은 한 자녀 정책에 따라 1가구 1자녀의 비율이 가장 높습니다.



Korea
N=207

No. of children

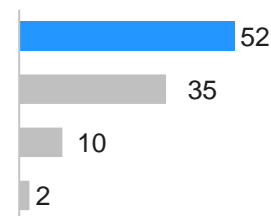
% of those who live with children



Average 1.6 children



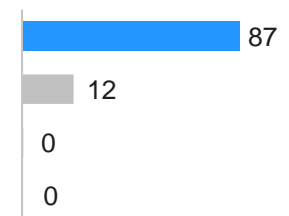
Japan
N=164



Average 1.5 children



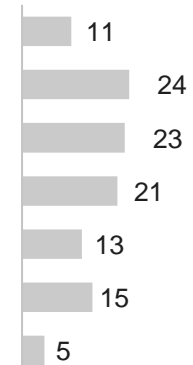
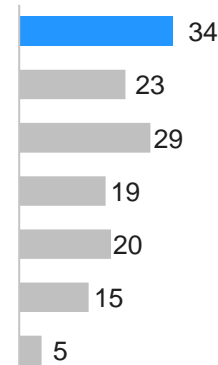
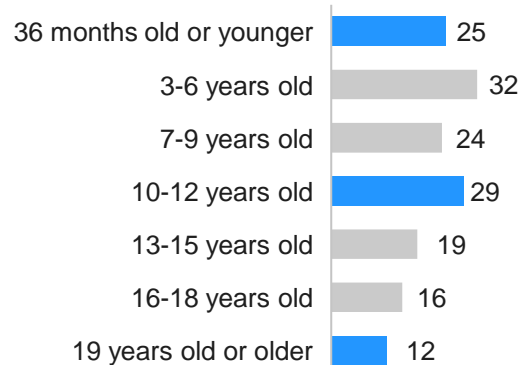
China
N=306



Average 1.1 children

Age of children

% of those who live with children



Thai families tend to have less children than other SE Asian families. Vietnam has the largest number of households living with their children in SE Asia.

태국의 평균 자녀 수는 1.4명으로 다른 동남아 국가 보다 적습니다. 베트남은 동남아 국가 중 자녀와 함께 사는 응답자가 가장 많습니다.



Philippines
N=210



Indonesia
N=227



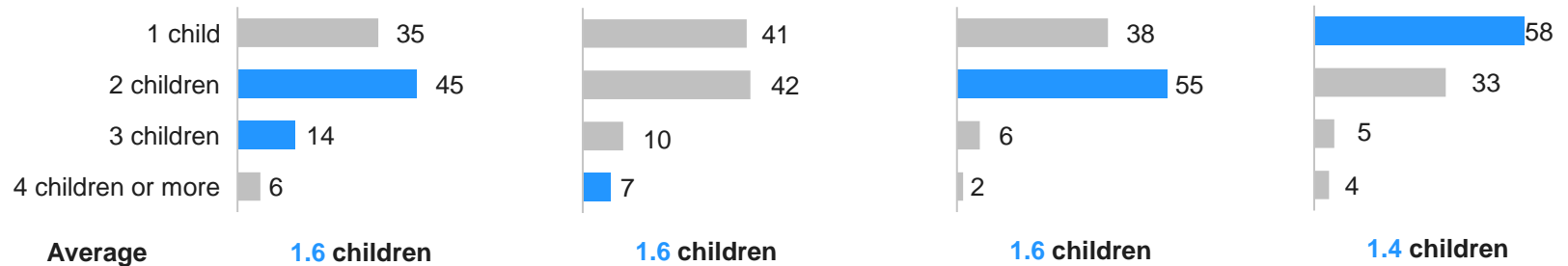
Vietnam
N=265



Thailand
N=161

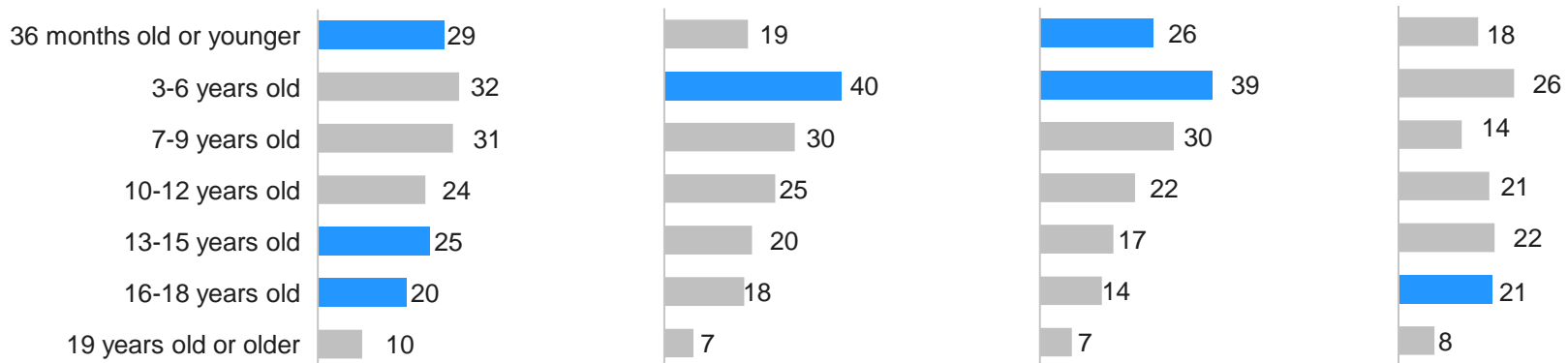
No. of children

% of those who live with children



Age of children

% of those who live with children



Korea and China have more respondents with university or higher education level. China also has the highest number of full-timer in Asia while Japan has more part-timers.

한국과 중국은 학사 이상의 교육 수준 비율이 높습니다.

중국은 아시아에서 정규직 노동자 비율이 가장 높은 한편, 일본은 비정규직 노동자의 비율이 가장 높습니다.



Korea
N=500



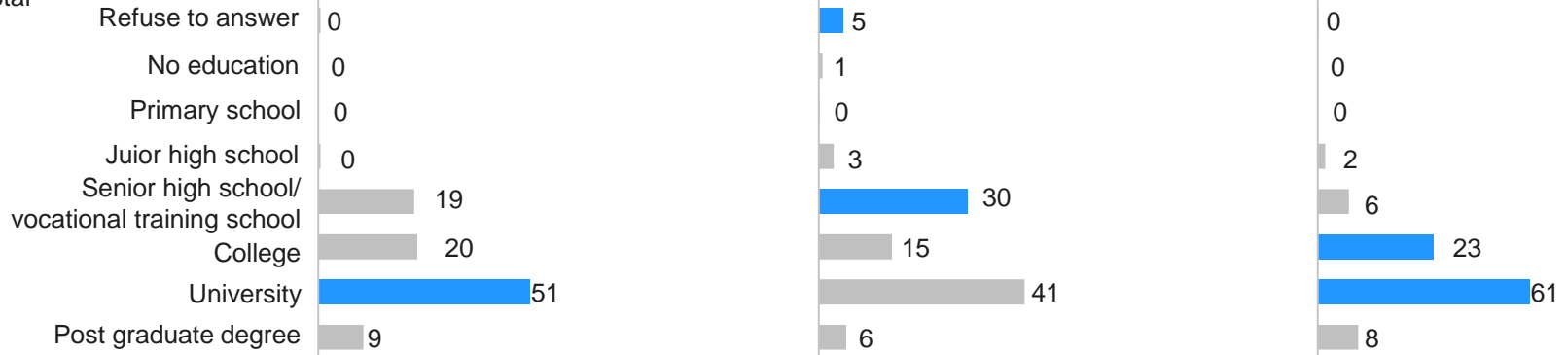
Japan
N=505



China
N=518

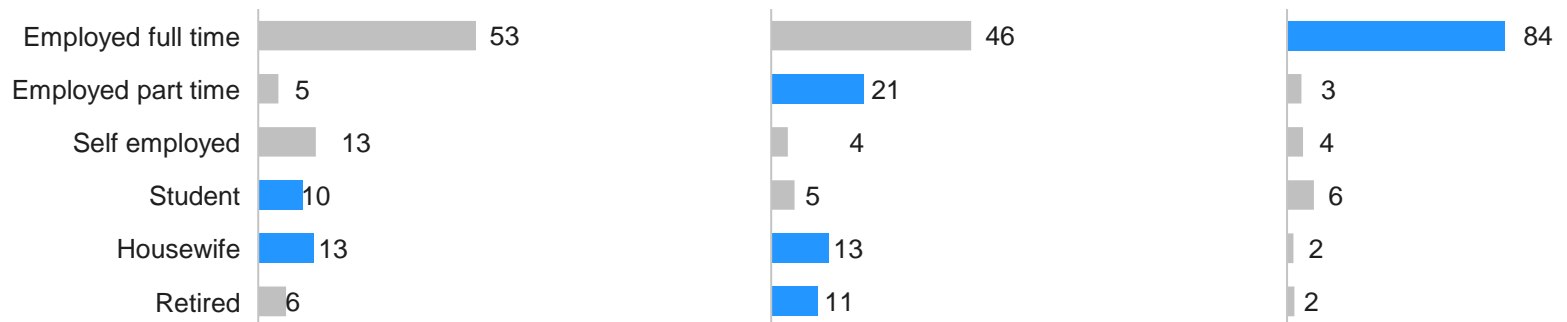
Education

% of total



Employment

% of total



SE Asian countries have more self-employed people compared to other Asian countries.

동남아 국가들은 다른 주요 아시아 국가에 비해 자영업자의 비율이 높습니다.



Philippines
N=508



Indonesia
N=504



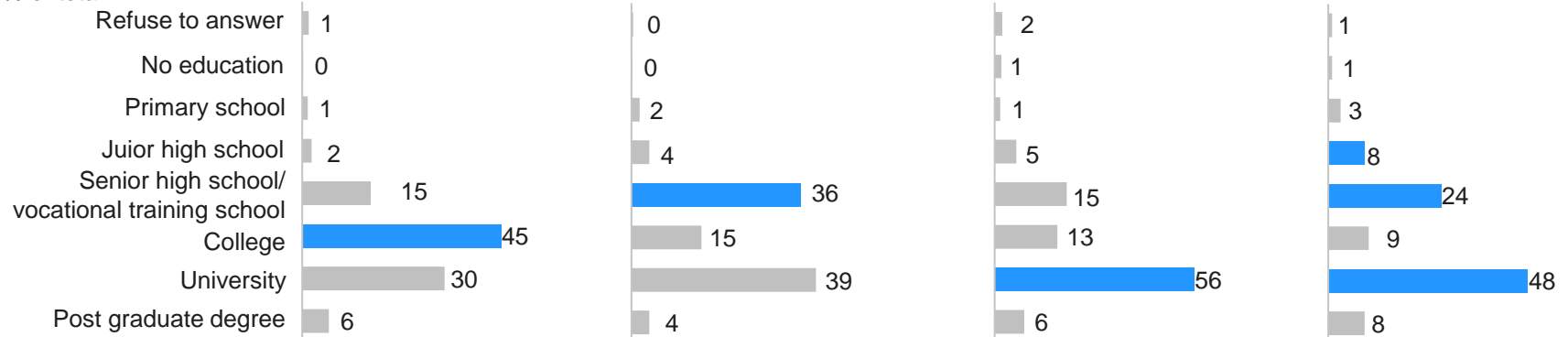
Vietnam
N=504



Thailand
N=509

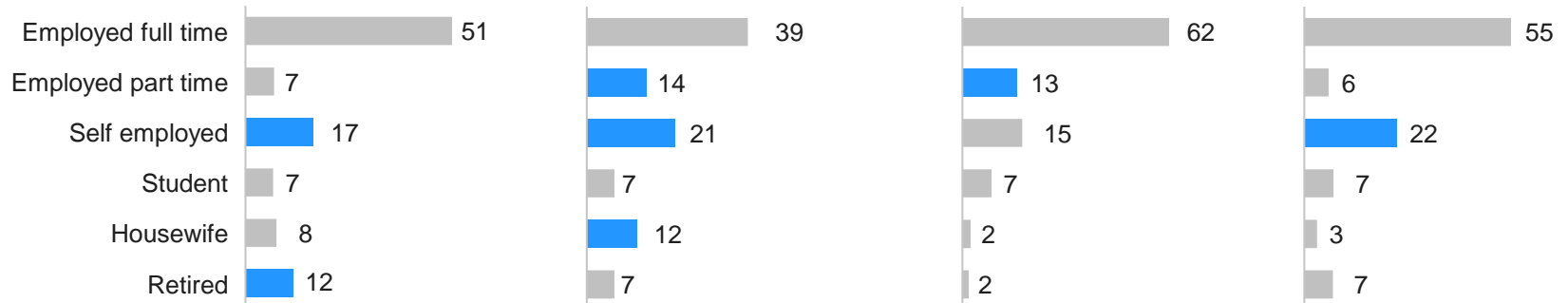
Education

% of total



Employment

% of total



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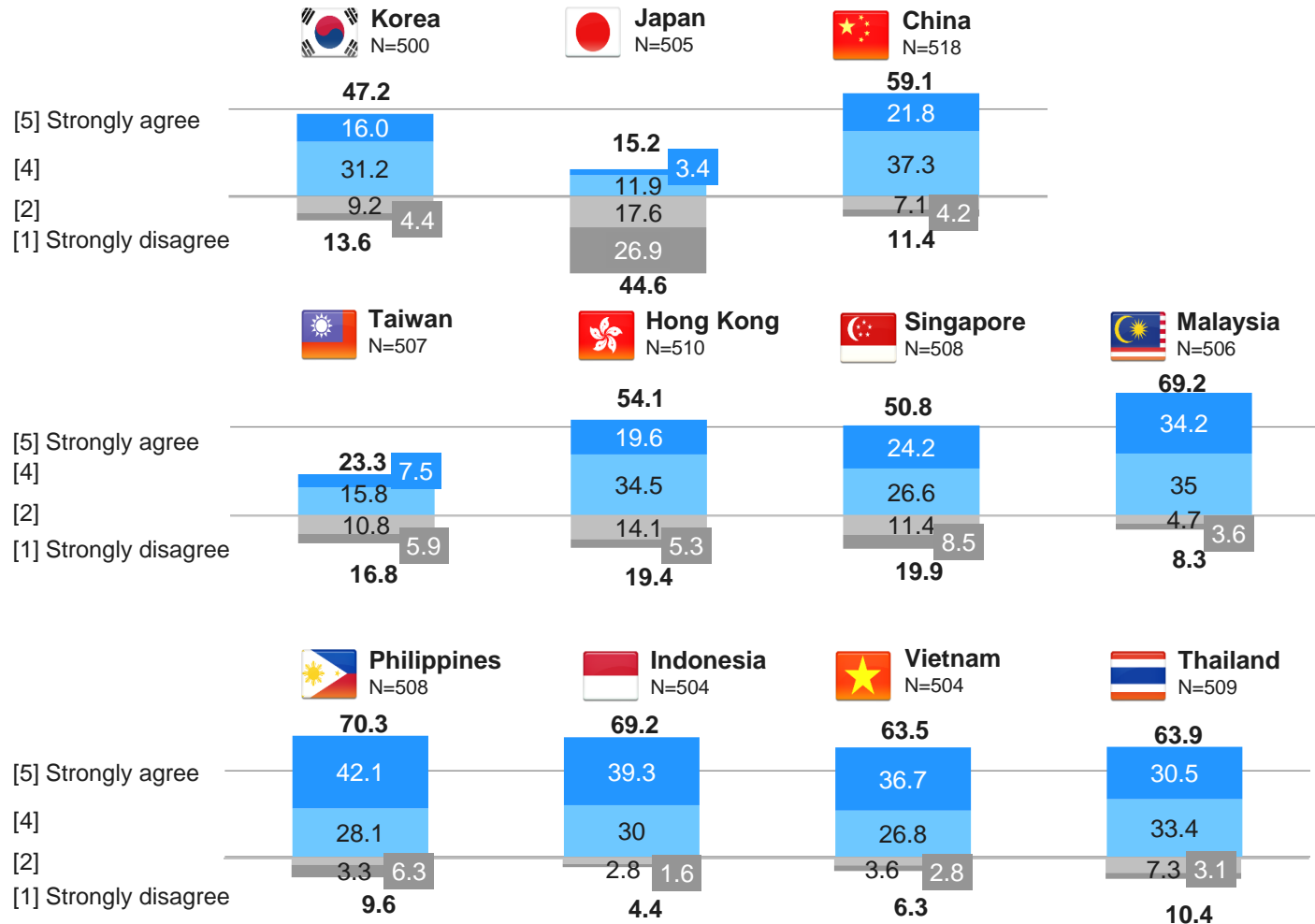
Part 5. **Digital adoption**

1. Shopping platform
2. Simple payment service

Financial prospect is more positive in SE Asian countries. Japan is the only country which has a negative financial outlook.

동남아시아 국가들은 미래 가계 소득에 대해 매우 긍정적으로 평가합니다. 반면, 일본은 미래 가계 소득에 대해 유일하게 부정적으로 평가합니다.

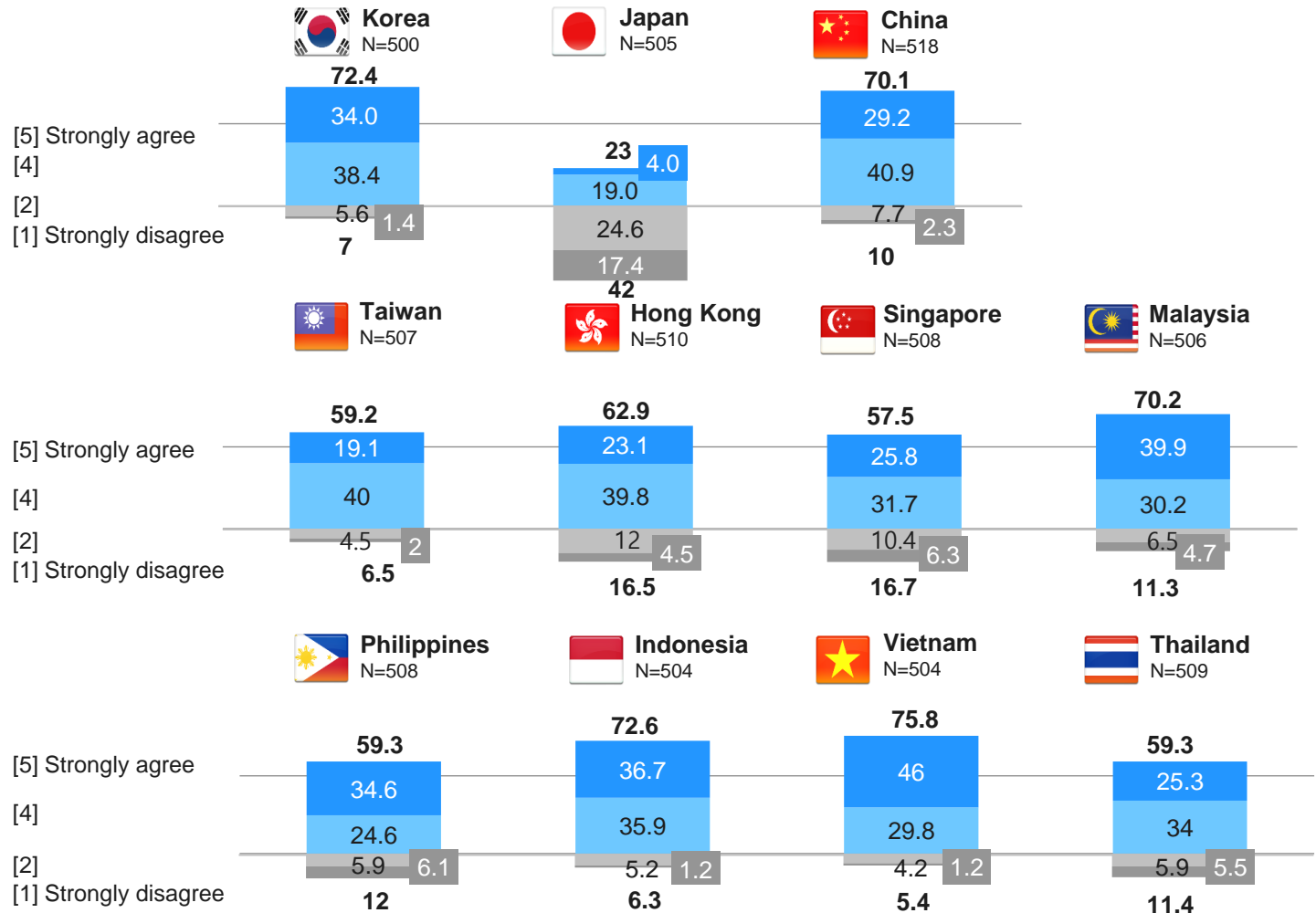
My household income will significantly increase in the next 5 years.



Asians, especially Vietnamese, have a strong desire for branded products, but not the Japanese.

일본을 제외한 모든 국가의 응답자는 유명 브랜드의 제품을 구매하고 싶어하는 성향을 보입니다. 특히, 베트남 응답자는 유명 브랜드 구매 성향이 가장 뚜렷합니다.

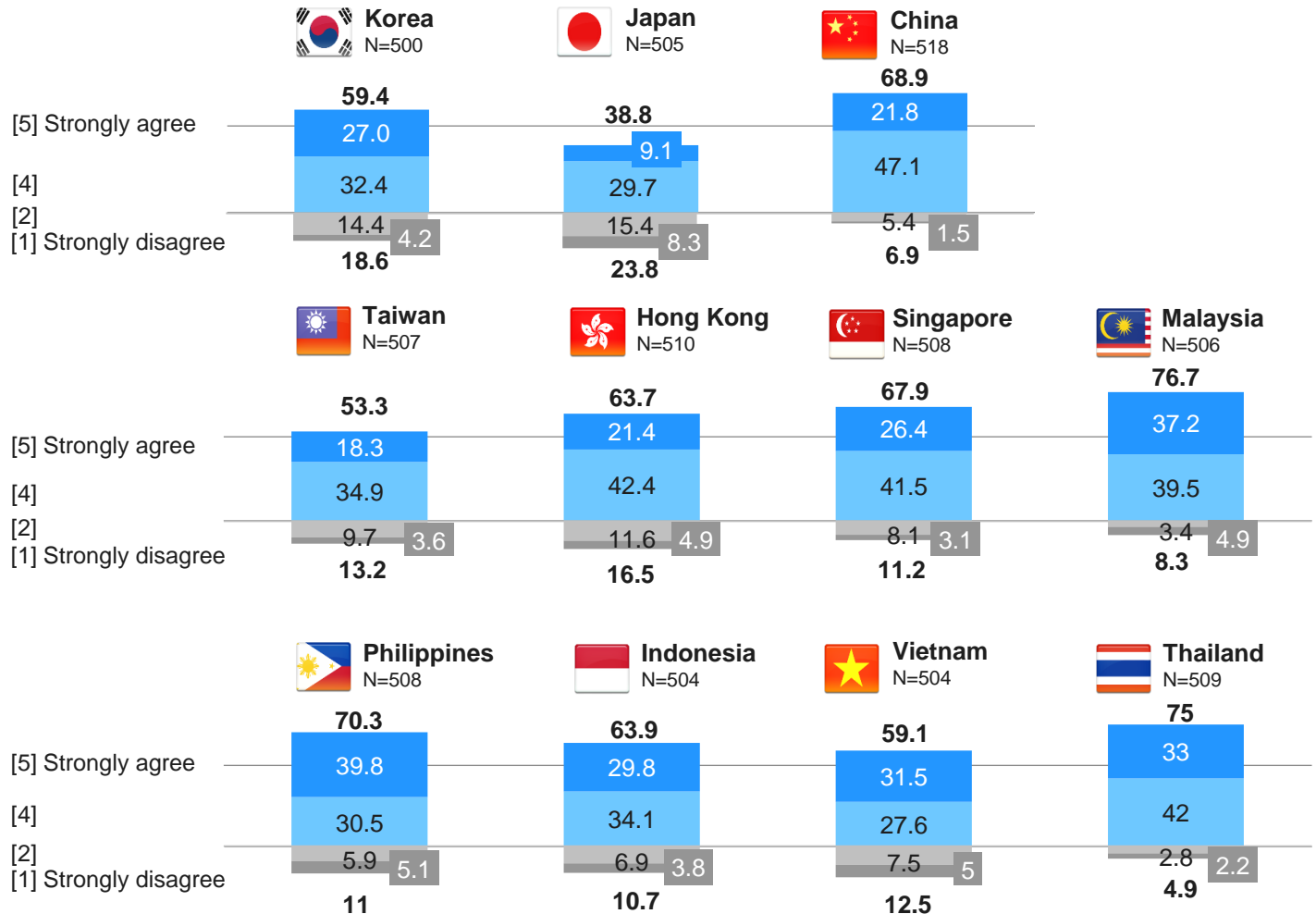
I would buy more famous branded products if I had more money.



Most respondents consider shopping more than just buying, whereas Japanese respondents tend to shop when they actually need something.

대부분 국가의 응답자는 쇼핑을 단순 구매 이상의 취미 활동으로 여깁니다. 반면, 일본 응답자는 실제 물건을 구매하기 위해 쇼핑합니다.

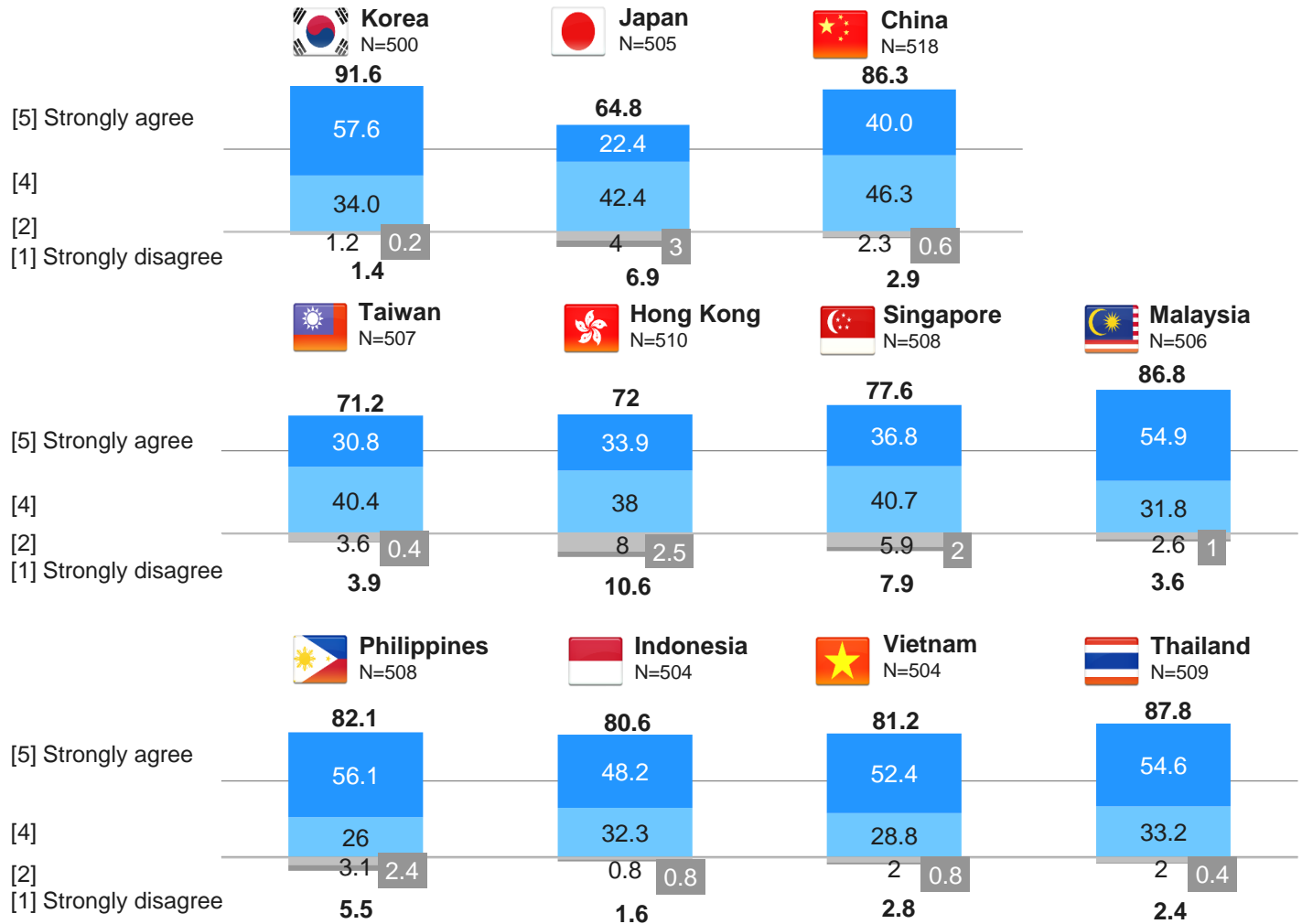
Even if I don't have anything to buy, I tend to access online/mobile shopping malls or go to stores just to look around.



All respondents use the Internet primarily to explore information when purchasing products, especially in Korea.

모든 국가 응답자는 제품 구매 시 정보 탐색을 위해 우선적으로 인터넷을 활용하며, 특히 한국은 90% 이상이 이에 해당합니다.

When it comes to buying a product, I use the internet as my primary tool for research.



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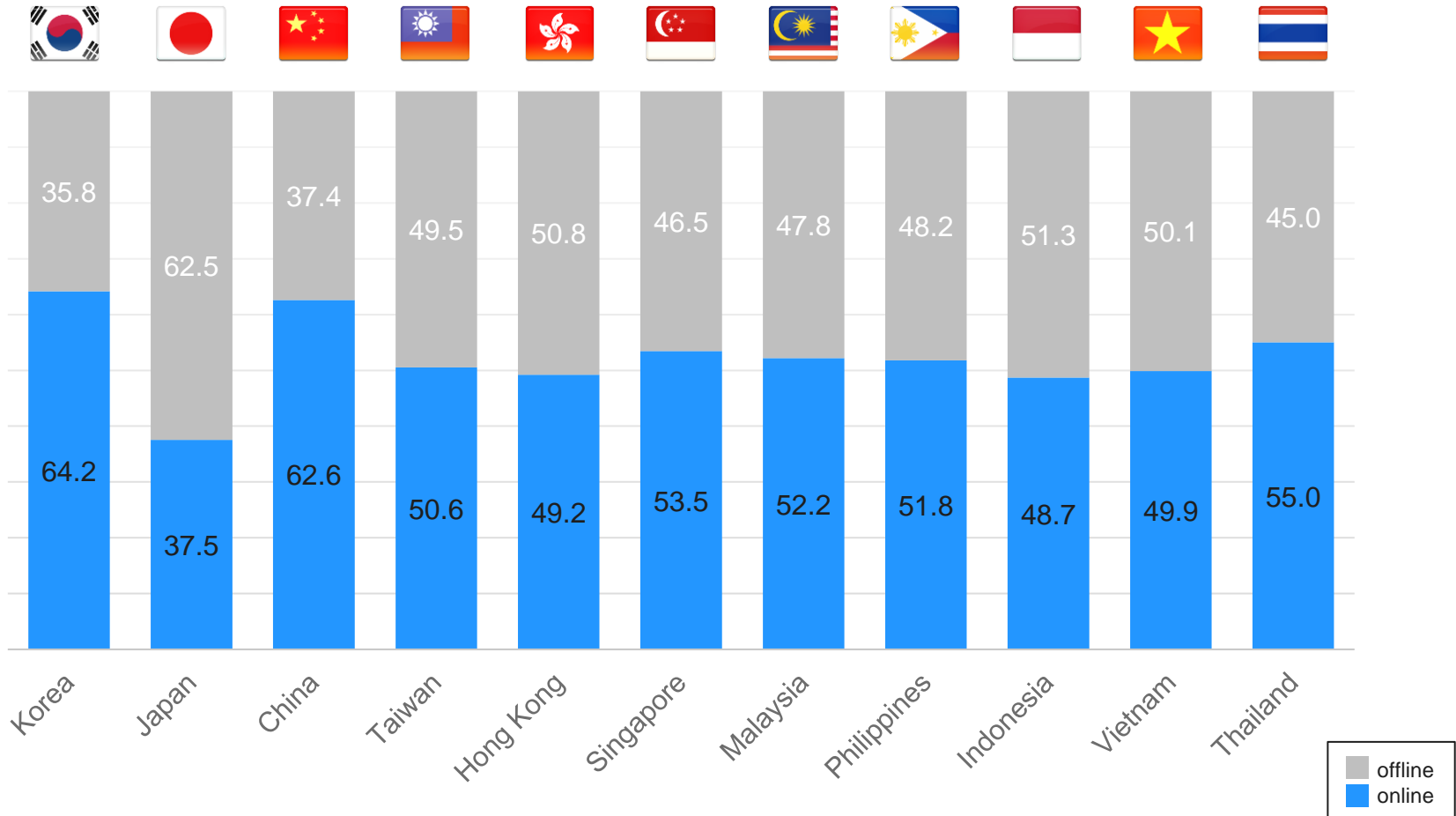
Part 5. **Digital adoption**

1. Shopping platform
2. Cashless payment service

Most countries in Asia use online and offline shopping similarly. Koreans and Chinese do much more online shopping, while Japanese prefer to shop offline.

대부분의 주요 아시아 국가 응답자는 물건을 구매할 때 온/오프라인 쇼핑을 비슷하게 사용합니다.

그 중 한국과 중국 응답자는 온라인 쇼핑을 특히 많이 사용하는 반면, 일본 응답자는 오프라인 쇼핑을 가장 많이 사용합니다.



Koreans and Chinese spend more money online than offline. Japanese spend more offline than online and spend the least amount on shopping over all in NE Asia.

한국과 중국은 오프라인 보다 온라인 쇼핑에서 더 많은 돈을 지출하지만, 일본은 온라인 보다 오프라인 쇼핑에서 더 많은 돈을 지출합니다. 한편 일본은 동북아시아 국가 중 쇼핑에 가장 적은 돈을 지출합니다.



Korea

N=488(Offline)
498(Online)



Japan

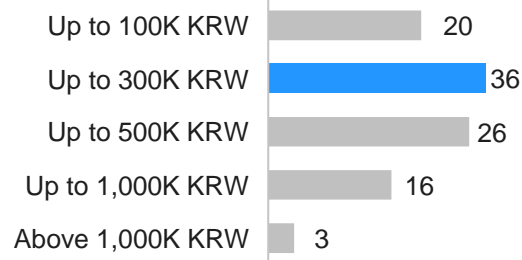
N=479(Offline)
453(Online)



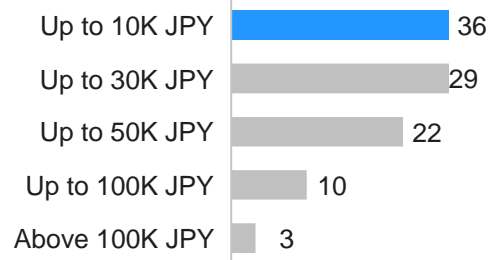
China

N=509(Offline)
514(Online)

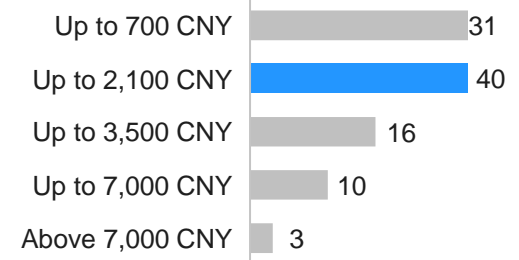
Monthly spending on offline shopping % of people shopping offline



Average
336,000 KRW
280 USD

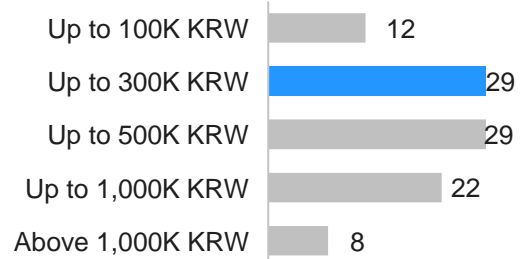


Average
26,900 JPY
252 USD

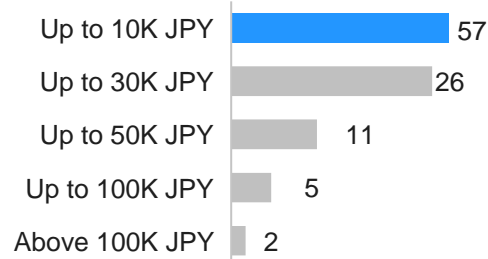


Average
1,852 CNY
264 USD

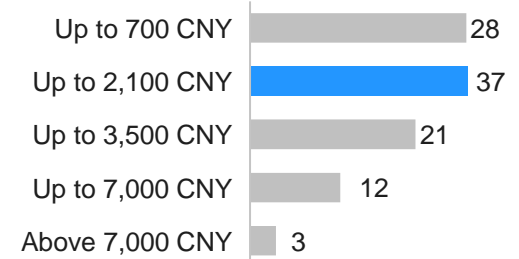
Monthly spending on online shopping % of people shopping online



Average
425,000 KRW
354 USD



Average
18,200 JPY
170 USD



Average
2,044 CNY
292 USD

Taiwan, Hong Kong and Singapore respondents spend more at offline shops. Hong Kong has the highest monthly average spending in both, among Asian countries.

대만, 홍콩, 싱가포르 응답자는 온라인 보다 오프라인 쇼핑에서 더 많은 돈을 지출합니다.

홍콩 응답자는 아시아 주요 국가 중 온라인 쇼핑물과 오프라인 매장 모두에서 월 평균 지출이 가장 많습니다.



Taiwan

N=485(Offline)
493(Online)



Hong Kong

N=486(Offline)
498(Online)

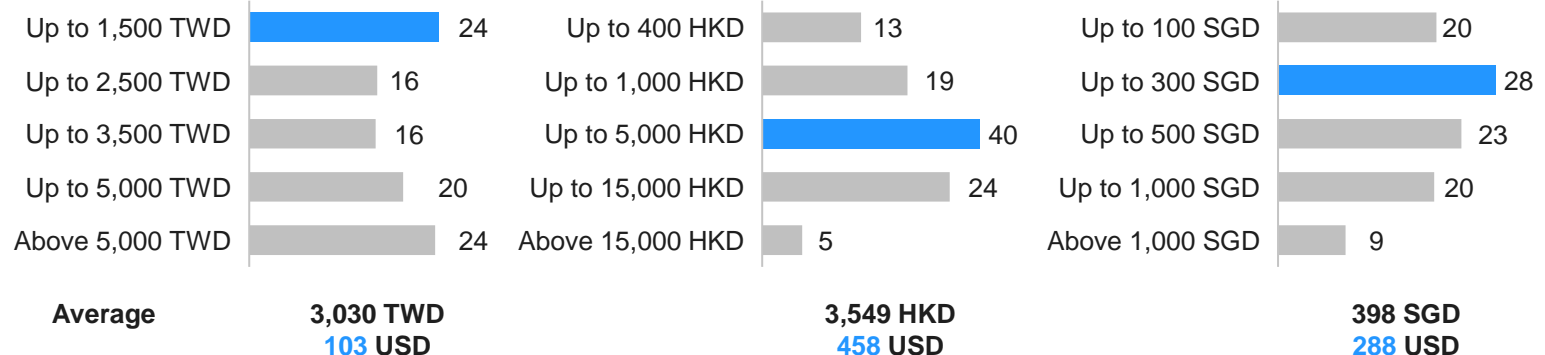


Singapore

N=466(Offline)
494(Online)

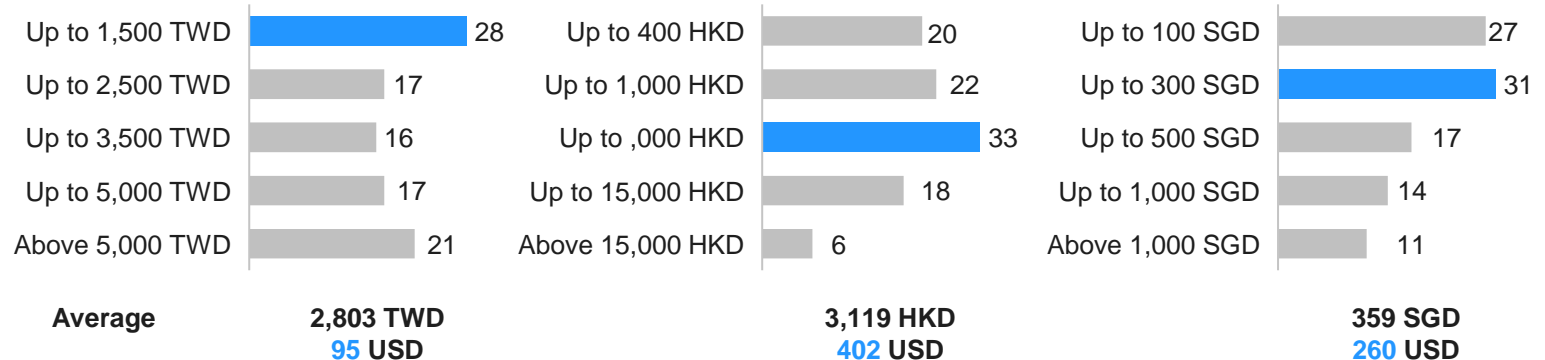
Monthly spending on offline shopping

% of people shopping offline



Monthly spending on online shopping

% of people shopping online



Thai respondents buy more online than offline and spend the largest amount online among SE Asian countries.

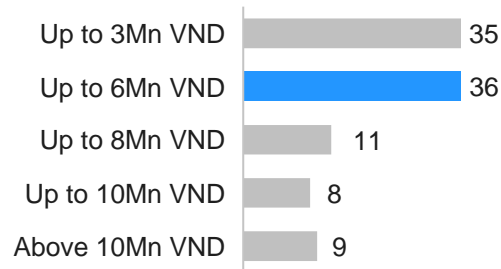
태국은 동남아 국가 중 제품 구매 시 온라인 구매 비율이 가장 높으며, 온라인 쇼핑물과 오프라인 매장 모두에서 월 평균 지출이 가장 많습니다.



Vietnam

N=448(Offline)
469(Online)

Monthly spending on offline shopping % of people shopping offline

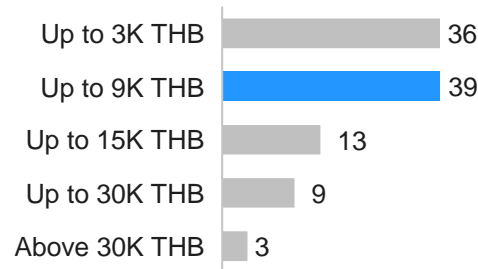


Average
4,625,000 VND
200 USD



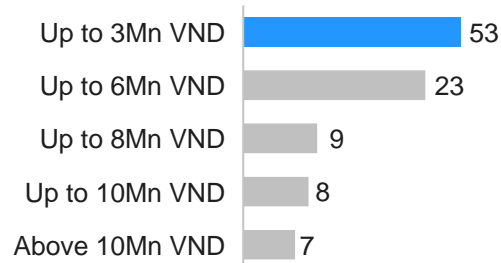
Thailand

N=432(Offline)
484(Online)

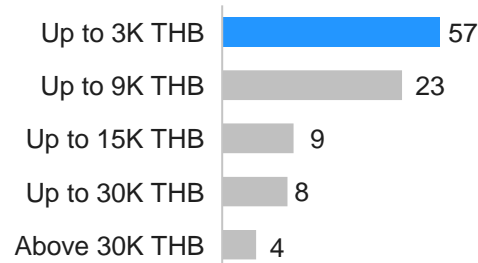


Average
6,780 THB
216 USD

Monthly spending on online shopping % of people shopping online



Average
3,880,000 VND
168 USD



Average
6,315 THB
201 USD

In NE Asian countries, majority shops offline more than once a week. Chinese shop most frequently both online and offline, while Japanese are least likely to shop online.

주요 아시아 국가의 응답자는 모두 주 1회 이상 오프라인 쇼핑을 하는 비중이 온라인 쇼핑에 비해 높습니다.

중국 응답자는 온라인/오프라인 쇼핑을 모두 가장 자주 사용 하는 반면, 일본 응답자는 온라인 쇼핑 빈도가 가장 적습니다.



Korea

N=488(Offline)
498(Online)



Japan

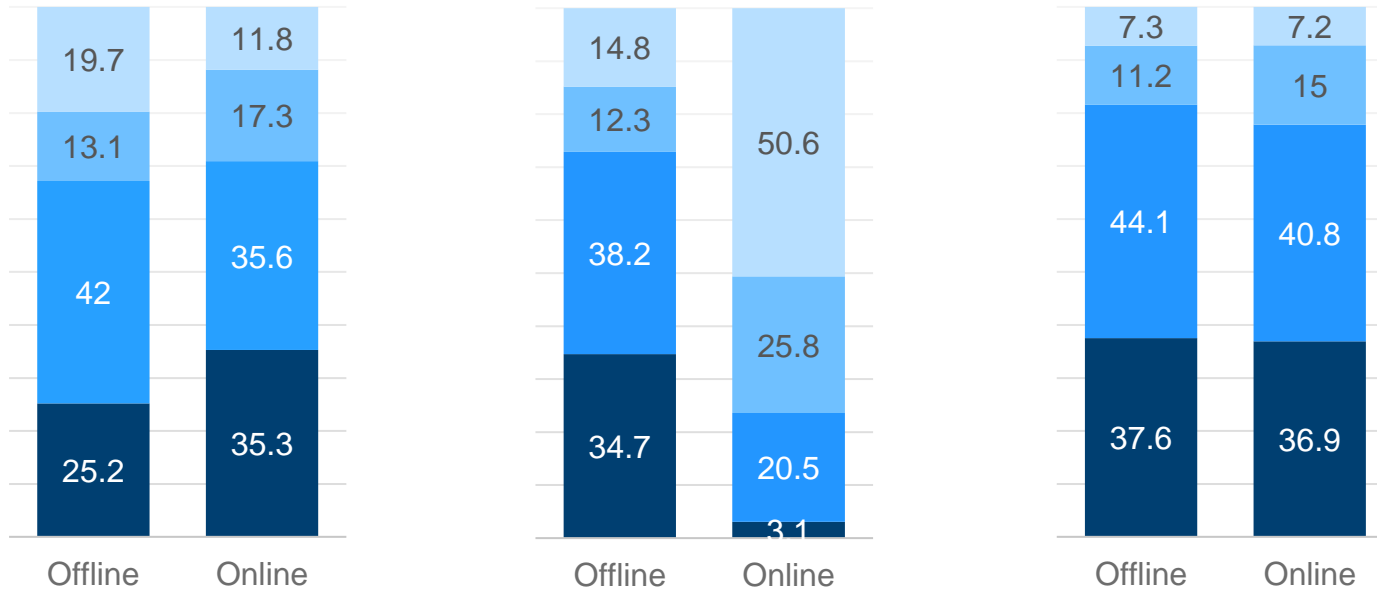
N=479(Offline)
453(Online)



China

N=509(Offline)
514(Online)

% of total



- About once every 1-3 days
- About once every 4-7 days
- About once every 2-3 weeks
- Less than about once a month

Vietnamese shop most frequently on and offline among SE Asian countries. Filipino, Indonesian and Thai respondents shop less frequently.

베트남은 동남아 국가 중 주 1회 이상 온라인/오프라인 쇼핑을 하는 비율이 가장 높습니다.
필리핀, 인도네시아, 태국은 주요 아시아 국가 대비 주 1회 이상 쇼핑하는 비중이 낮습니다.



Philippines

N=449(Offline)
480(Online)



Indonesia

N=471(Offline)
478(Online)



Vietnam

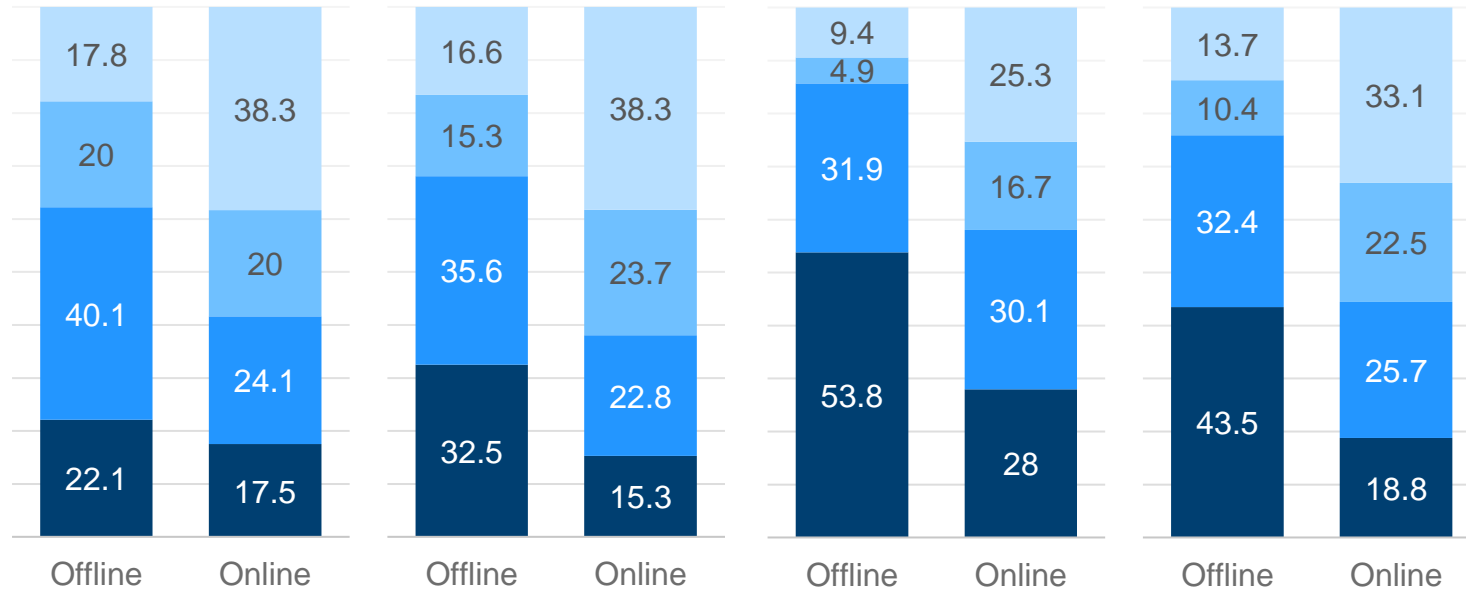
N=448(Offline)
469(Online)



Thailand

N=432(Offline)
484(Online)

% of total



- About once every 1-3 days
- About once every 4-7 days
- About once every 2-3 weeks
- Less than about once a month

Korean and Chinese use mobile online shopping the most, while Japan is the only country that uses PCs more than mobile. TV shopping is especially popular in Korea.

한국과 중국 응답자는 아시아 주요 국가 중 모바일을 활용한 온라인 쇼핑을 가장 많이 사용합니다. 반면, 일본 응답자는 유일하게 온라인 쇼핑 시 모바일 보다 PC를 활용하는 비율이 높습니다. 한편 한국 응답자는 TV 홈쇼핑을 타 국가 대비 특히 많이 사용합니다.



Korea
N=500

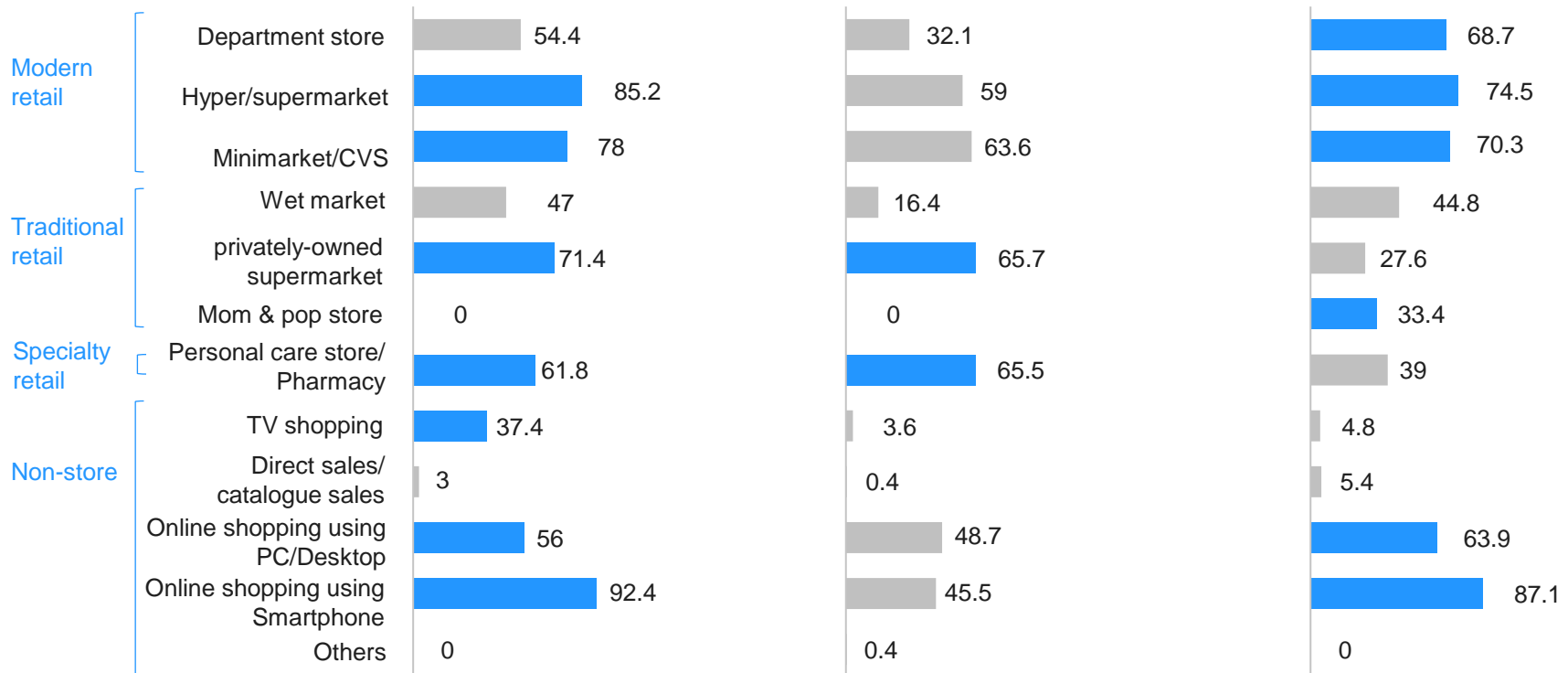


Japan
N=505



China
N=518

Retail formats purchased from in the past 12 months % of total



When it comes to online shopping, mobile is the #1 channel in SE Asia. Filipino, Vietnamese, and Thai respondents use more traditional than modern retail channels.

동남아 국가들은 온라인 쇼핑으로 물건을 구매할 때 모바일을 월등히 많이 사용합니다.

필리핀, 베트남, 태국 응답자는 Traditional retail을 다른 나라보다 자주 사용하고, 그 중 Wet market을 특히 많이 사용합니다.



Philippines
N=508



Indonesia
N=504

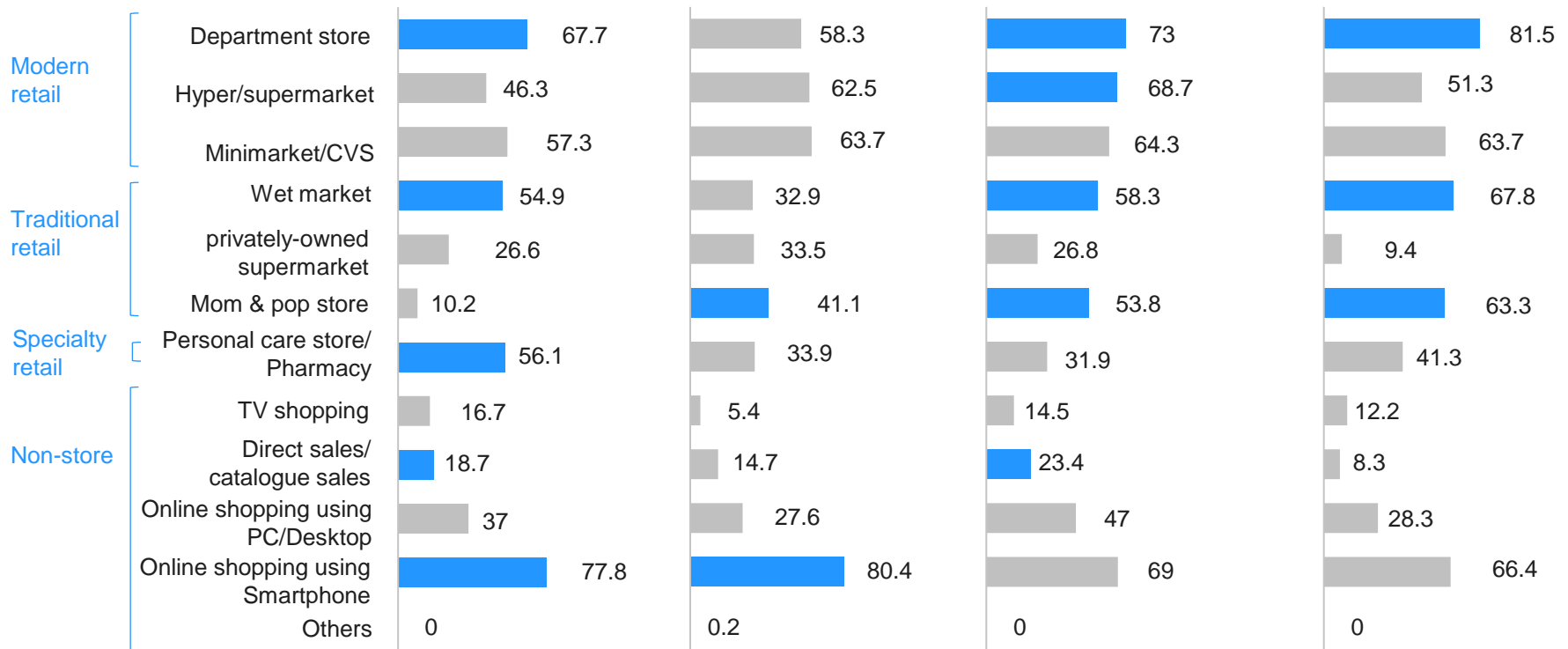


Vietnam
N=504



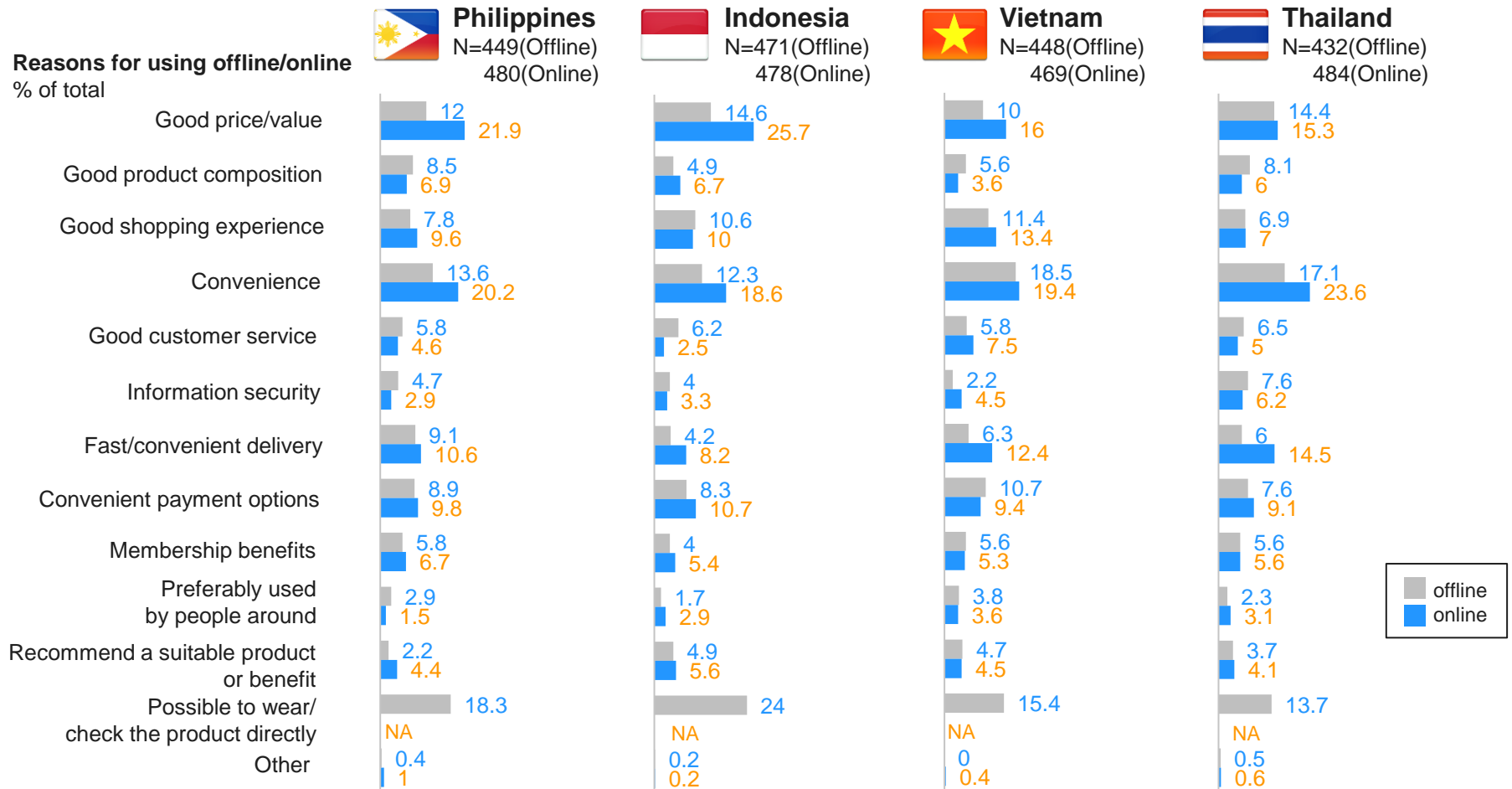
Thailand
N=509

Retail formats purchased from in the past 12 months
% of total



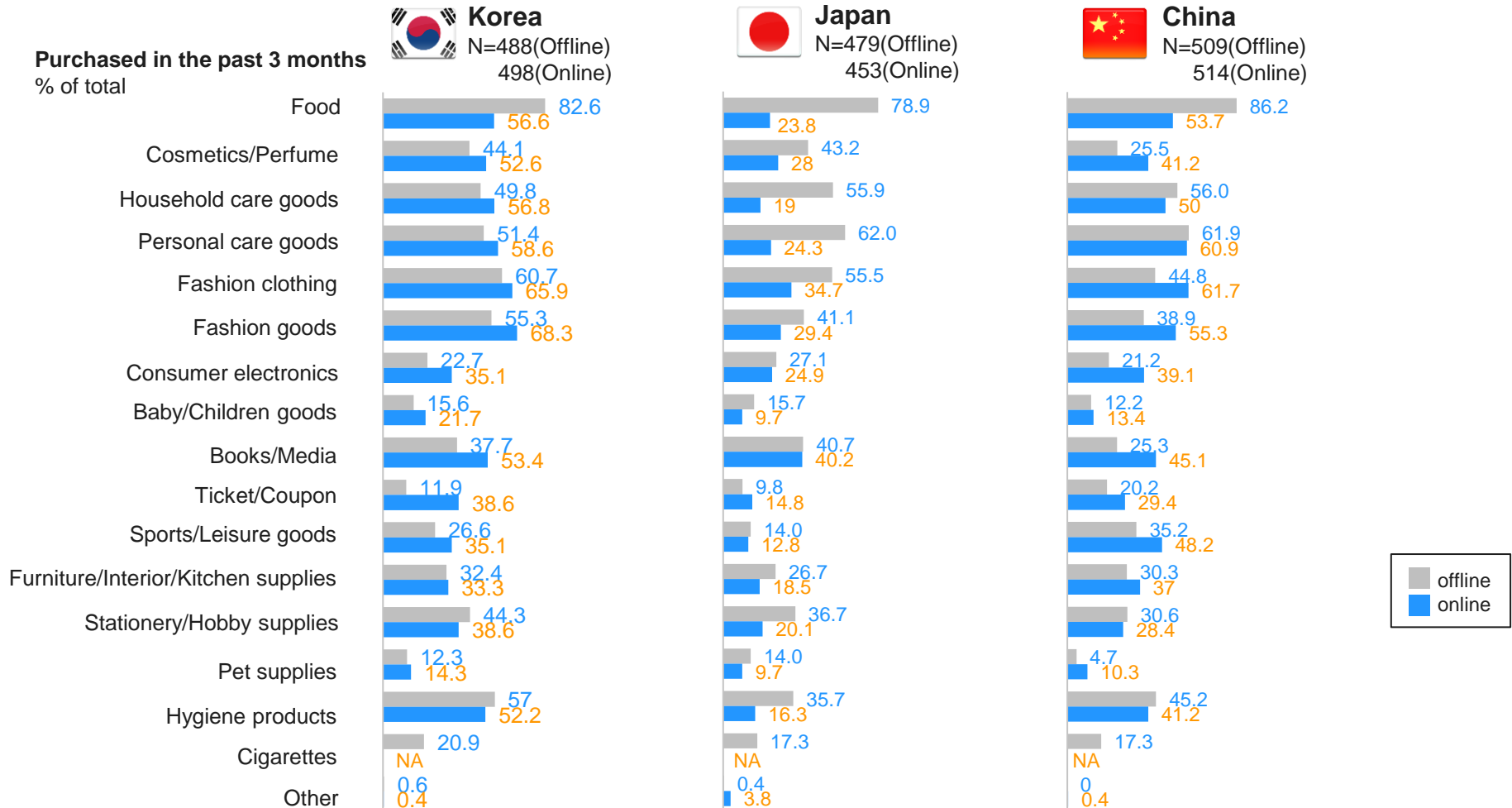
Given the relatively developed e-commerce market in Thailand, convenience and fast delivery are the main reasons for consumers shopping online.

온라인 쇼핑이 상대적으로 발달한 태국의 경우 편리함과 빠른 배송이 소비자들이 온라인으로 쇼핑을 하는 주된 이유입니다.



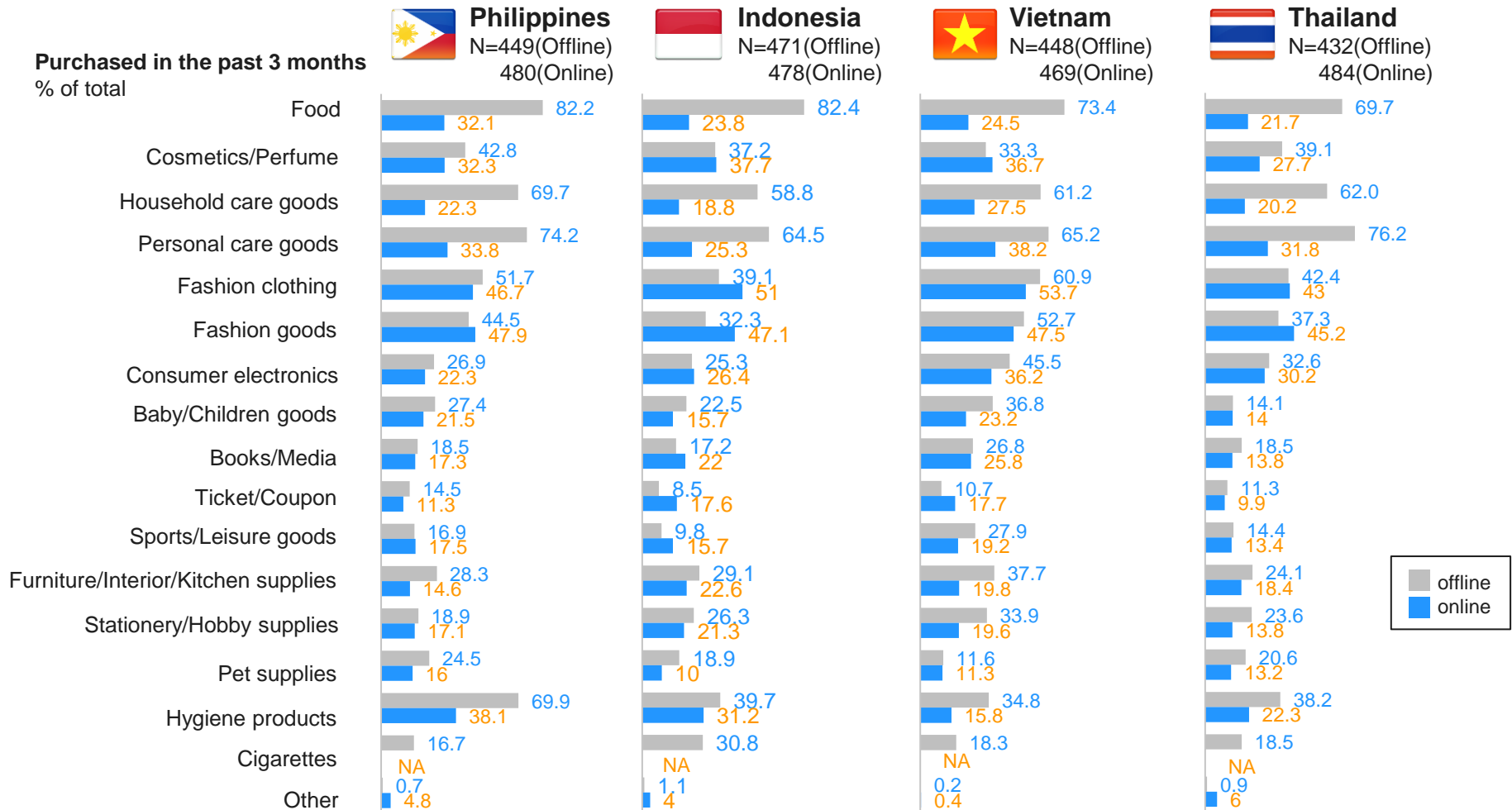
Respondents in every Asian countries buy far more groceries offline than online. Korean and Chinese respondents buy the most diverse items online.

식료품의 경우, 아시아 주요국 모두에서 오프라인 구매의 비중이 월등히 높습니다.
한국과 중국 응답자는 가장 다양한 물품을 온라인 쇼핑몰에서 구매합니다.



SE Asians buy a lot of clothes and fashion goods online. Filipinos have a high interest in hygiene products. Consumer electronics and children goods are popular in Vietnam.

동남아시아 응답자는 온라인에서 의류와 패션잡화를 특히 많이 구매합니다. 한편, 필리핀은 방역용품에 대한 관심이 높으며 오프라인에서 더 많이 구매합니다. 베트남 응답자는 동남아시아에서 전자 제품과 유/아동 용품을 가장 많이 구매합니다.



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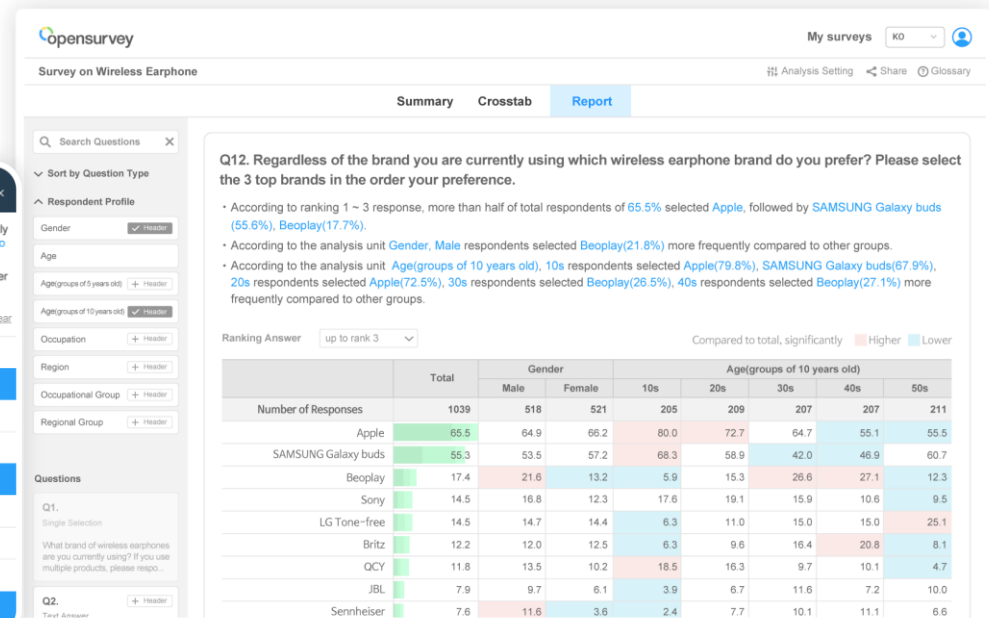


OPENSURVEY

innovated collection and analyses of consumer data
in the mobile era.

OpenAnalytics

Survey APP 'OVEY'



- The usual months-long survey is shortened to half a day if executed on mobile

Survey on cosmetic

You answered that the toner you usually use doesn't fit on your skin type.

Why do you think so?
Please answer in detail

Notice
Your detailed and candid answers are appreciated

I got skin trouble after using this toner, so I don't think this toner fits my skin.
Actually I have dried type skin, so I'm thinking of changing it to a toner containing hyaluronic acid.
I want a product that is not irritating and has soft ingredients.

Next >


- Videos and photos are optimized for mobile environment

Survey on game

From now on, we show you **the video related to the game**.
Please check the video below and respond to the survey.

If you don't watch the video until the end, you couldn't move on to the next.

Select 1



☐ I checked the video

Next >

- Panels can also upload photos

Survey on food stand

Please register **the panoramic view of the food stand** in the photo.

Please take a picture so that **we can see everything from the top to the bottom** as shown in the example image.

Example image)





Next >



Technology is at the root of OPENSURVEY, and we are constantly innovating how we ask & understand contemporary consumers.

Real-time

We quickly collect responses on mobile devices.
We record the moment consumers take an action.



Photo
response
survey



Retargeting



Diary



Mobile
interview



Barcode
response
survey

(Only in Korea) (Only in Korea) (Only in Korea)

Multimedia

Today more and more contents are consumed on mobile. We present images & videos and collect feedback.



Image
questions



Video
questions



Viewing
confirmation



APP
installment
confirmation

Place (Only in Korea)

Mobile goes with consumers wherever they go. We combine consumer visit records with survey data to better understand consumer activities.



Visiting
location
confirmation



Flow
analysis



Offline
mission

Analytics

You can use user-friendly expert level data analysis tool to gain insights from the data you gather.



Crosstab



Insight



Trekking result
analysis



Leading companies partner with OPENSURVEY to understand consumers and solve their business problems.



Thank you

Please feel free to inquire about OPENSURVEY, our research methodology, data and more.

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