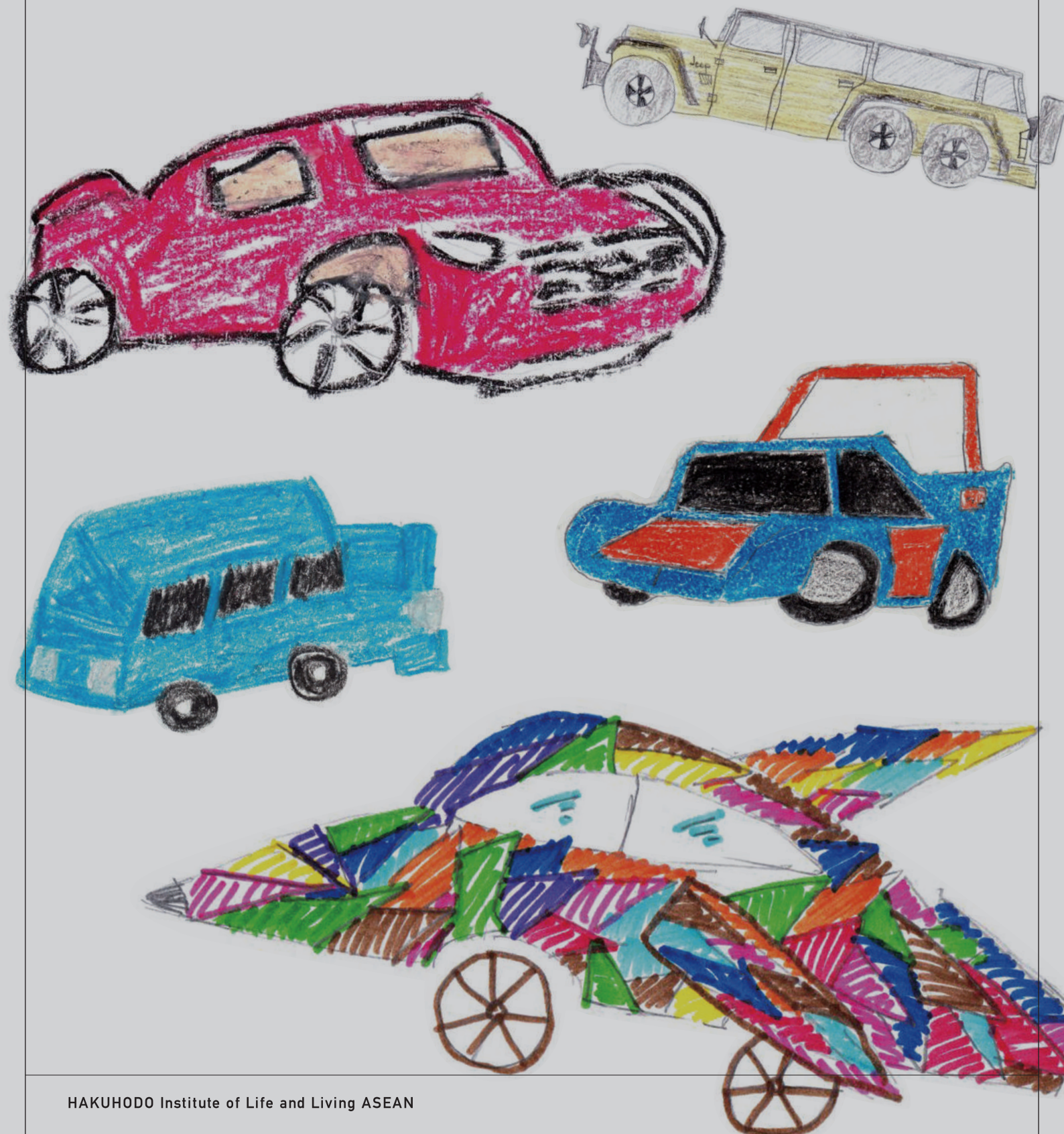# Car Drawing Survey

Can car future trends be predicted from drawings of desired cars?

What shape of cars do children today draw in the ASEAN countries?

This issue of ASEAN Sei-katsu-sha magazine features a "drawing survey" to predict future trends in automobiles. It is based on the hypothesis that "future prediction" could be made from the "pictures drawn by children".

In the survey, each parent and child drew a picture of "what comes to mind when you hear the word 'car'" and "car you want to drive in the future", in an attempt to grasp the future automobile trends from the differences of the cars drawn by the "parent" and "child", and of "what comes to mind when you hear the word 'car' (at present)" and "car you want to drive (in the future)".

*In Singapore, the survey targeted only children.

Children in Japan in earlier societies often drew a sedan when they heard the word "car". But most children today draw an MPV.

※MPV (Multi Purpose Vehicle)

In Thailand, Pick-ups are currently one of the most popular car types. How many of the targeted children there would draw a Pick-up as the car they want to drive in the future?
In Indonesia, MPVs are mainstream. How many of the targeted children there would draw an MPV as the car they want to drive in the future?

Survey Outline

☐ Survey method: Door-to-door interview survey ☐ Survey subjects SEC: SEC: Class A : Class B/C = 50% : 50%

☐ Survey location: Singapore, Kuala Lumpur (Malaysia), Bangkok (Thailand), Jakarta (Indonesia) and Ho Chi Minh City (Vietnam)

☐ Sample size: Four countries: 30 parent–child pairs (60 people) / Singapore: 30 children

☐ Age of target children: 8 to 12 year-old 50%, 13 to 17 year-old 50% ☐ Research firm: Tokyo Survey Research

Car Drawing Survey
Results and Bird's Eye View
of Data by Country

Trends in car body types | Trends in car body colors

Trends in car body types

In the five survey subject ASEAN countries, each parent and child were asked to draw a picture of "a car that comes to mind when hearing the word 'car'" and "a car they want to drive in the future". The car types are classified according to the columns with "a car that comes to mind when hearing the word 'car' (Now)" and "a car they want to drive in the future (Future)", parent (P) and child (C).

※Images with a specific brand names are counted in "Corporate Brand" or "Product Brand."

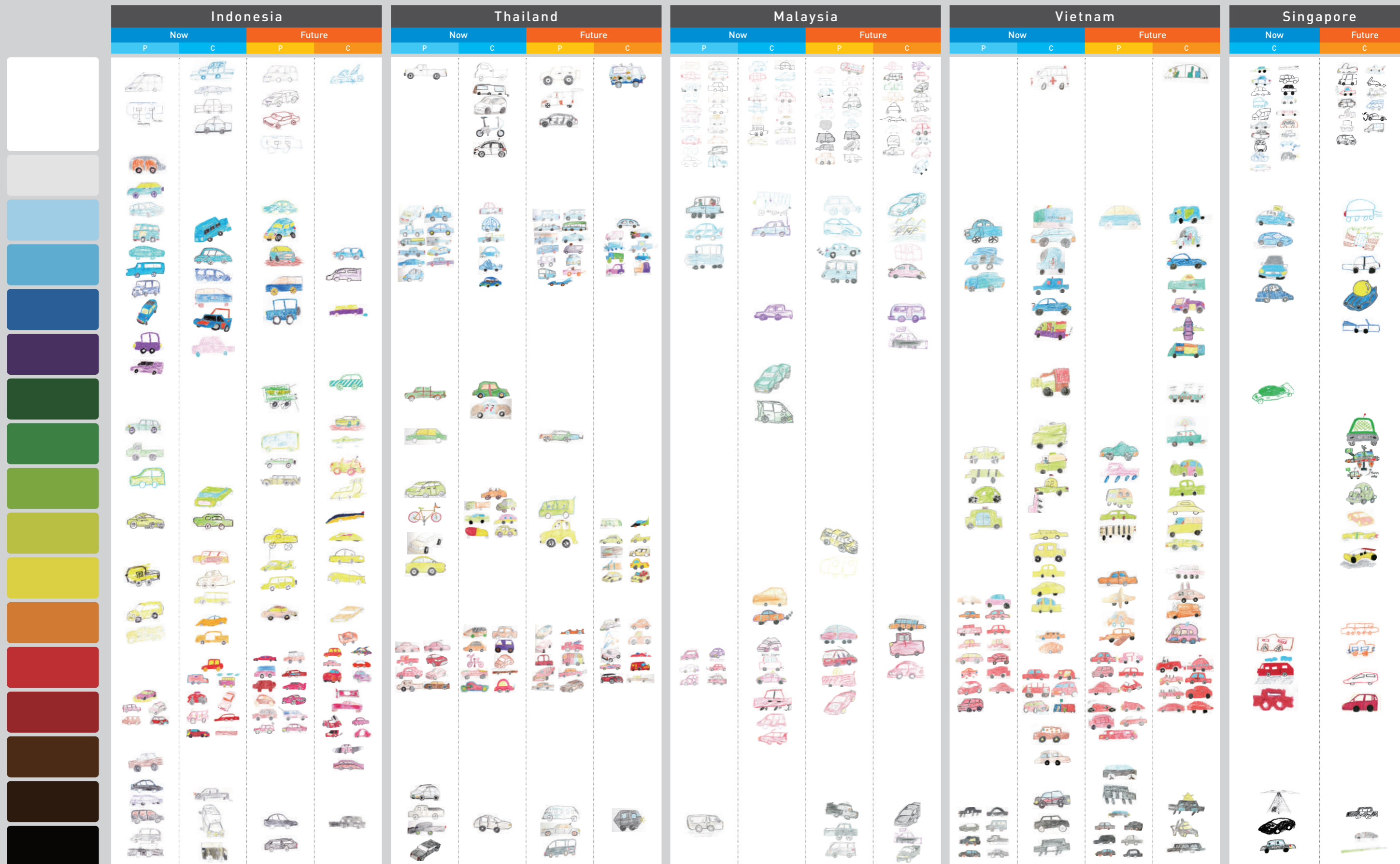|	Indonesia Now P	Indonesia Now C	Indonesia Future P	Indonesia Future C	Thailand Now P	Thailand Now C	Thailand Future P	Thailand Future C	Malaysia Now P	Malaysia Now C	Malaysia Future P	Malaysia Future C	Vietnam Now P	Vietnam Now C	Vietnam Future P	Vietnam Future C	Singapore Now C	Singapore Future C
Corporate brand (total number)	0	5	4	6	0	0	0	2	0	1	4	10	0	0	0	0	4	1
Product brand (total number)	17	12	11	5	0	2	3	5	23	20	25	17	0	0	0	0	2	3
Compact Car — Total (now / future)	3		1		6		1		12		6		3		2		0	0
Compact Car — Corporate brand	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Compact Car — Product brand	0	2	0	1	0	0	0	0	6	5	3	3	0	0	0	0	0	0
Sedan — Total (now / future)	18		12		26		9		32		19		36		13		14	1
Sedan — Corporate brand	0	3	0	0	0	0	0	0	0	0	1	5	0	0	0	0	0	0
Sedan — Product brand	3	2	1	0	0	0	0	0	11	11	6	6	0	0	0	0	2	0
Sport — Total (now / future)	3		17		3		13		0		6		3		9		4	5
Sport — Corporate brand	0	0	3	4	0	0	0	2	0	0	1	3	0	0	0	0	2	1
Sport — Product brand	0	0	0	1	0	0	1	1	0	0	1	1	0	0	0	0	0	0
MPV — Total (now / future)	23		13		4		20		11		17		9		18		5	6
MPV — Corporate brand	0	0	0	1	0	0	0	0	0	0	2	0	0	0	0	0	1	0
MPV — Product brand	8	7	6	1	0	0	2	0	5	3	10	2	0	0	0	0	0	1
SUV — Total (now / future)	10		11		0		2		1		1		6		0		3	1
SUV — Corporate brand	0	2	1	1	0	0	0	0	0	1	0	0	0	0	0	0	1	0
SUV — Product brand	6	1	4	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0
Pick-up — Total (now / future)	1		0		15		6		0		3		0		0		0	0
Pick-up — Corporate brand	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Pick-up — Product brand	0	0	0	0	0	0	0	0	0	0	2	1	0	0	0	0	0	0
Other — Total (now / future)	3		7		5		13		4		9		2		18		4	17
Other — Corporate brand	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	0
Other — Product brand	0	0	0	2	0	0	0	4	1	1	3	3	0	0	0	0	0	2

* Rules for distinguishing SUV from MPV
1. A description with a specific SUV brand name or its typical features such as ground clearance and 4WD.
2. A clear image of SUV features, such as a rear-mounted spare wheel and high seat position, even without narrative descriptions.
3. Categorized as MPV when the image is indistinguishable.

* Rules for distinguishing Compact from Sedan
1. A description with a specific Compact brand name or its typical features such as a hatchback.
2. A clear image of Compact features, such as a hatchback-shaped rear body and no trunk, even without narrative descriptions.
3. Categorized as Sedan when the image is indistinguishable.

Trends in car body colors

In the five survey subject ASEAN countries, each parent and child were asked to draw a picture of "a car that comes to their mind when hearing a word 'car'" and "a car they want to drive in the future". The car body colors are classified according to the axes of "a car that comes to mind when hearing the word 'car' (Now)" and "a car they want to drive in the future (Future)", parent (P) and child (C) in consideration of a color distribution.

	Indonesia				Thailand				Malaysia				Vietnam				Singapore	
	Now		Future		Now		Future		Now		Future		Now		Future		Now	Future
	P	C	P	C	P	C	P	C	P	C	P	C	P	C	P	C	C	C

*Those pictures drawn by lines are considered to be colored white.
*Each picture has a narrative description of the car and they are placed in the chart based on its color description even when the picture is a line drawing.
*In Singapore, the survey targeted only children.

Trends in Body Types

and Body Colors

in the Five

ASEAN Countries
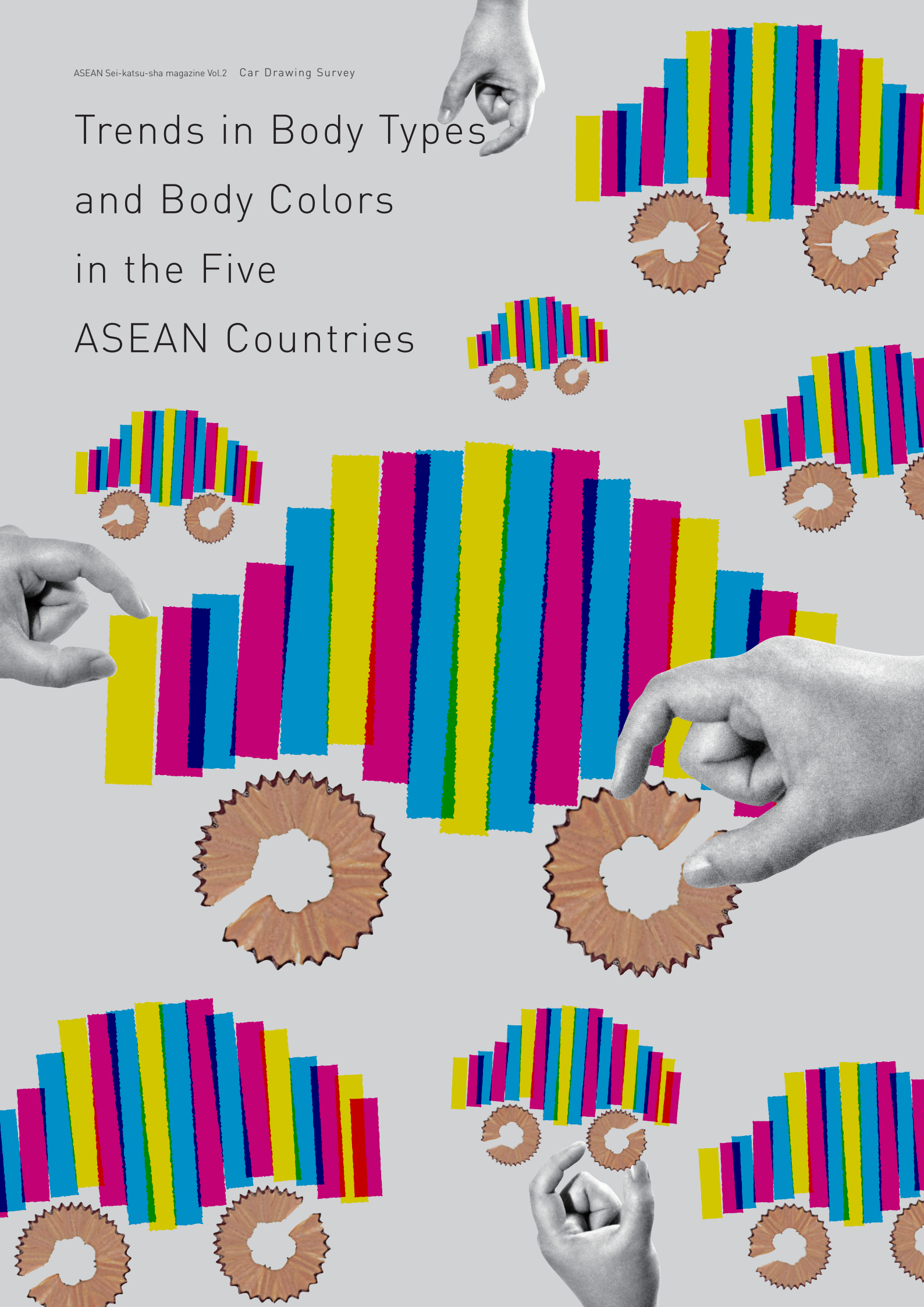
Key Findings in the Five ASEAN Countries

— Body Types —

1　Sedans trending down in popularity in all five countries?!

Sedans, as expected, are depicted as a major body type of the current car image in each country, but a fall in future can be predicted when you consider the decline in the number of its car image in the future in all countries together.

Sedan

Now
Future

	Indonesia	Thailand	Malaysia	Vietnam	Singapore
Now	18	26	32	36	14
Future	12	9	19	13	1
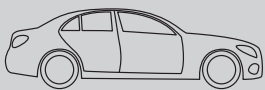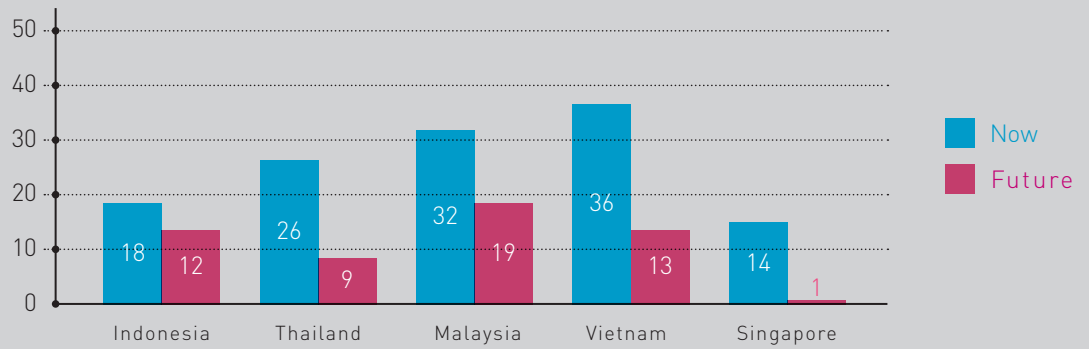
2　MPVs will gain more popularity in all four countries except for Indonesia.

On the other hand, MPVs seem to be trending upward as the body type of future car in all four countries other than Indonesia where they are commonly evoked at present.

MPV

Now
Future

	Indonesia	Thailand	Malaysia	Vietnam	Singapore
Now	23	4	11	9	5
Future	13	20	17	18	6
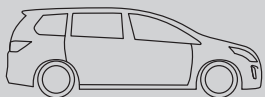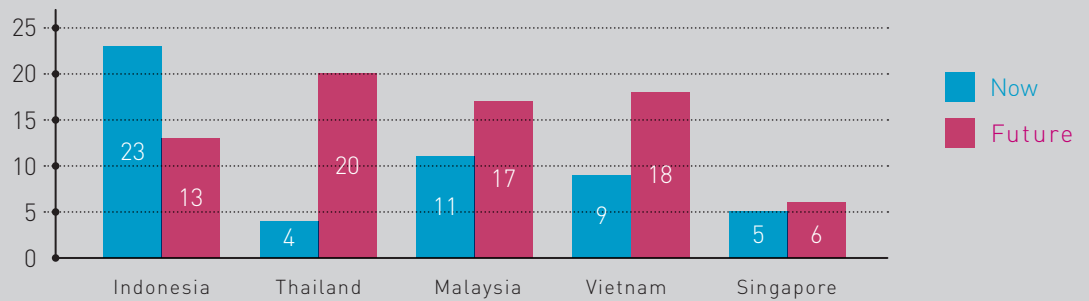
3　Admiration for Sports Cars prevails in all five countries!

Sports Cars have an increase in the number of future car image in all five countries, and longing for Sports Cars is present in the same way.

Sport

Now
Future

	Indonesia	Thailand	Malaysia	Vietnam	Singapore
Now	3	3	0	3	4
Future	17	13	6	9	5
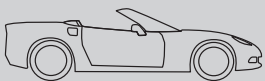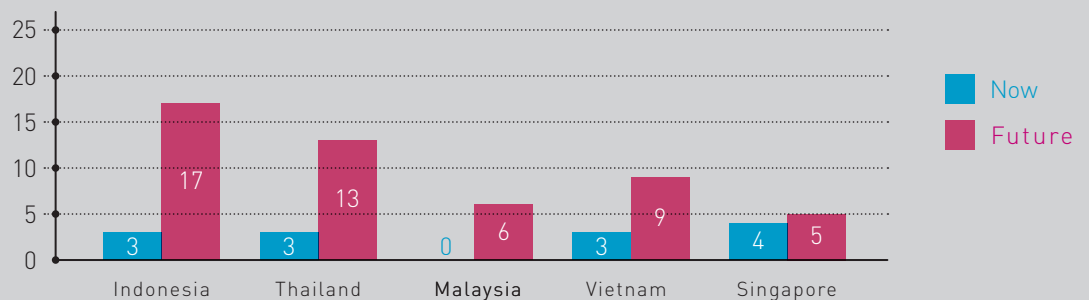
Key Findings in the Five ASEAN Countries

— Body Colors —

Red and partially yellow cars are popular in Indonesia, Thailand and Vietnam.

Indonesia		Thailand		Malaysia		Vietnam		Singapore	
Now	Future	Now	Future	Now	Future	Now	Future	Now	Future
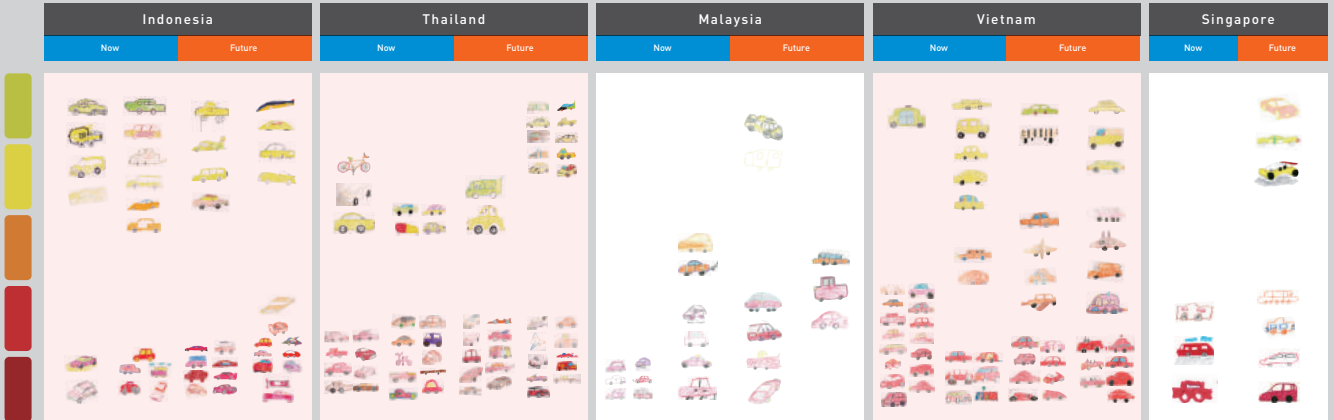
Blue cars are slightly more popular than other colors in Thailand.

Indonesia		Thailand		Malaysia		Vietnam		Singapore	
Now	Future	Now	Future	Now	Future	Now	Future	Now	Future
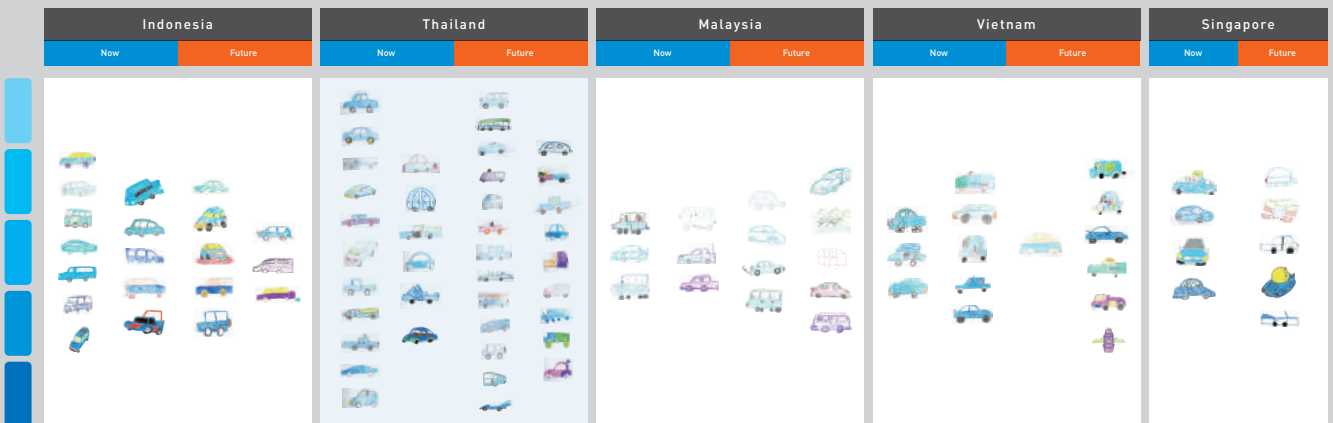
Colors used in the national flags unconsciously favored in general?
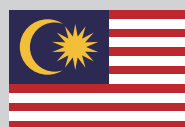
| Indonesia | Thailand | Malaysia | Vietnam | Singapore |

Key Findings

in Indonesia

ASEAN Sei-katsu-sha magazine Vol.2
Car Drawing Survey

Key Findings in Indonesia

1

MPVs and SUVs are the cars of "Now"!
Brand awareness of specific cars is strong.

Now

Drawings and their descriptions of MPVs and SUVs of
"what comes to mind when you hear the word car (Now)".

Parents

Toyota Avanza

Toyota Kijang Innova
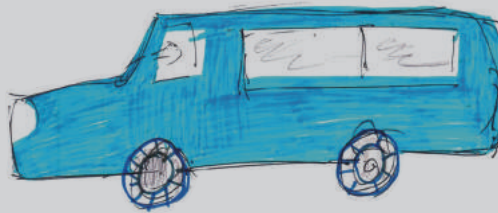
Toyota Kijang Lgx
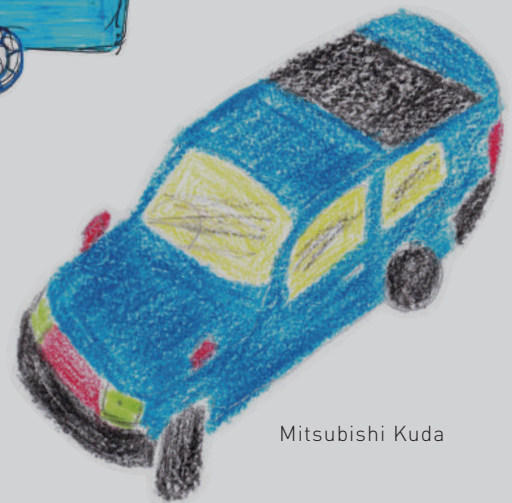
Mitsubishi Pajero

Mitsubishi Kuda

Children

Jeep

Daihatsu Xenia

Toyota Kijang Lgx

[Comment from Hakuhodo researcher]

☐ Devi from Indonesia

Indonesians are generally made up of extended families and do have collectivist background culture, where we need a larger car with more room and seats to fit more friends and family members. We feel sad when there is a family member left behind, and the idea of sitting closely with other family members during a car trips is a bonding experience, sharing warmth and joy. The users of mid size MPVs are seen as the typical humble, family oriented, that is why MPVs are seen as a socially acceptable choice for Indonesians. The opposite can be said, for future car, they opted to draw a Sports Cars with red and yellow colors that screams 'look at me', this reflects their inner desire to stand out and break free from the social norm. We are starting to see more younger Indonesians heading in this direction when choosing a car, they want to stand out and opt for the 'non-safe' choice, so they can be different from their fathers.

Key Findings in Indonesia

2

Sports Cars are the cars of "Future"!
SUVs are steady, and Sedans and MPVs decline.

Future

Comparison of "what comes to mind when you hear the word car (Now)"
and "a car you want to drive in the future (Future)".

		Now		Future	
		P	C	P	C

Sport

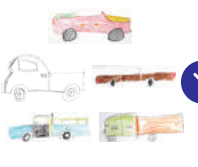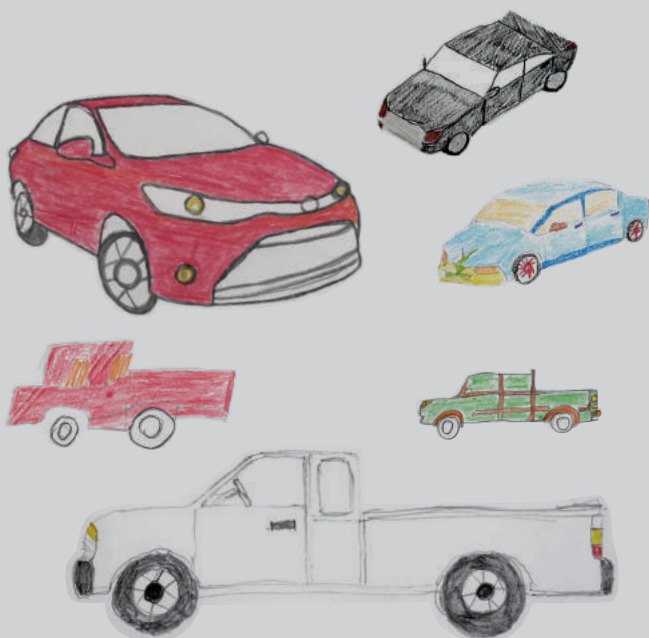|	Now		Future	
	P	C	P	C
Total number (comparison now and future)	3		17	
Corporate brand	0	0	3	4
Product brand	0	0	0	1

SUV

	Now		Future	
	P	C	P	C
Total number (comparison now and future)	10		11	
Corporate brand	0	2	1	1
Product brand	6	1	4	0

MPV

	Now		Future	
	P	C	P	C
Total number (comparison now and future)	23		13	
Corporate brand	0	0	0	1
Product brand	8	7	6	1

Sedan

	Now		Future	
	P	C	P	C
Total number (comparison now and future)	18		12	
Corporate brand	0	3	0	0
Product brand	3	2	1	0

Key Findings in Indonesia

3

Durable, Luxurious, High Ground Clearance and such are the keywords of SUVs of "Future".

Future

—— Drawings and their descriptions of SUVs as "a car you want to drive in the future (Future)". ——

Parents
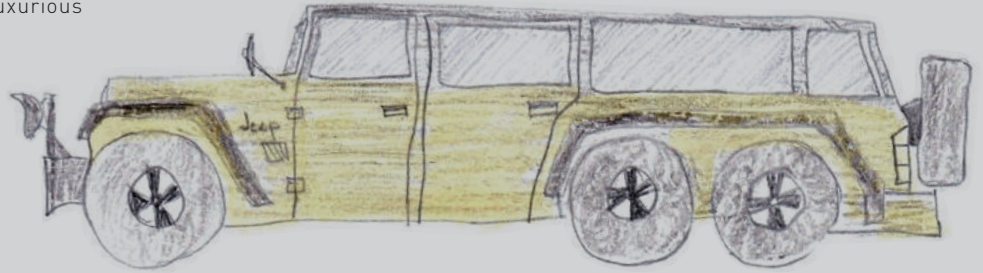
Luxurious

Flexible
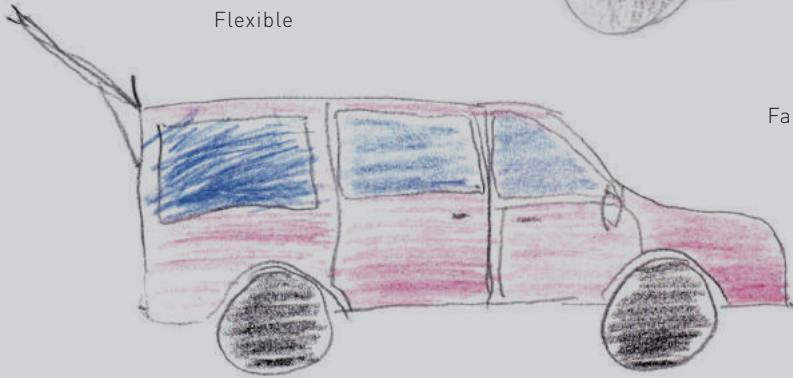
Family

Solar Power, Eco friendly
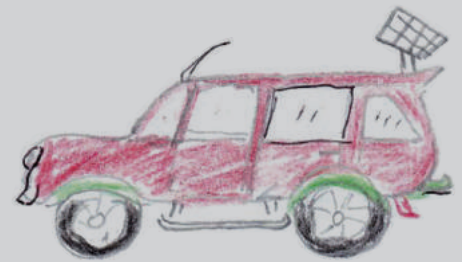
Children

High ground clearance

Powerful

Durable

Key Findings in Indonesia

4

Red and yellow are the colors of the admired Sports Cars!
Cool, Stylish, and Luxurious are the keywords.

Future

—— Drawings and their descriptions of Sports Cars as "a car you want to drive in the future (Future)". ——

Parents

Luxurious

Stylish

Children

Cool
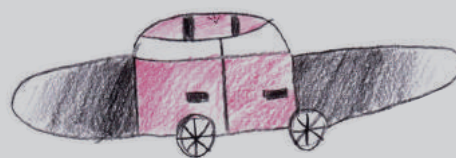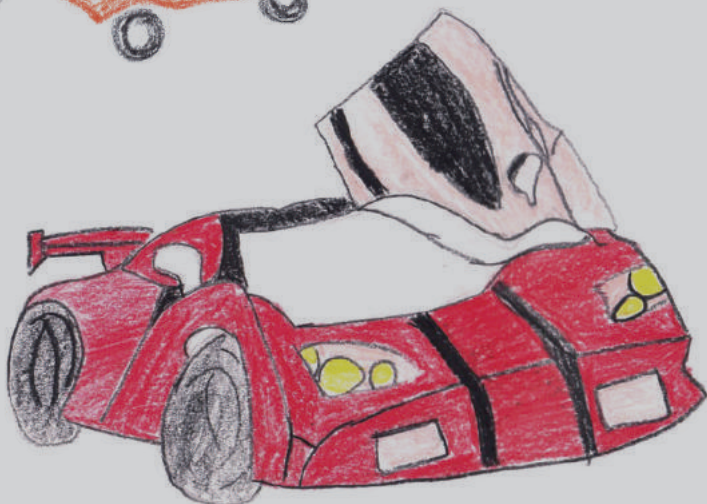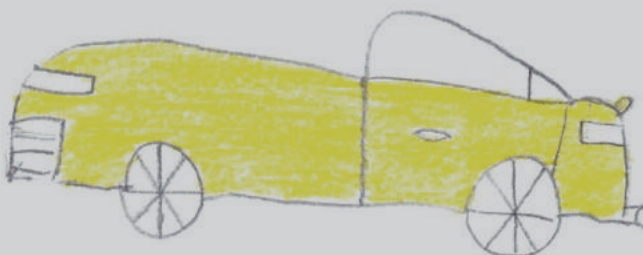
Key Findings in Indonesia

5

Flying cars are the cars of "Future"
in heavily congested cities?!

Future

Drawings of flying cars as "a car you want to drive in the future (Future)".
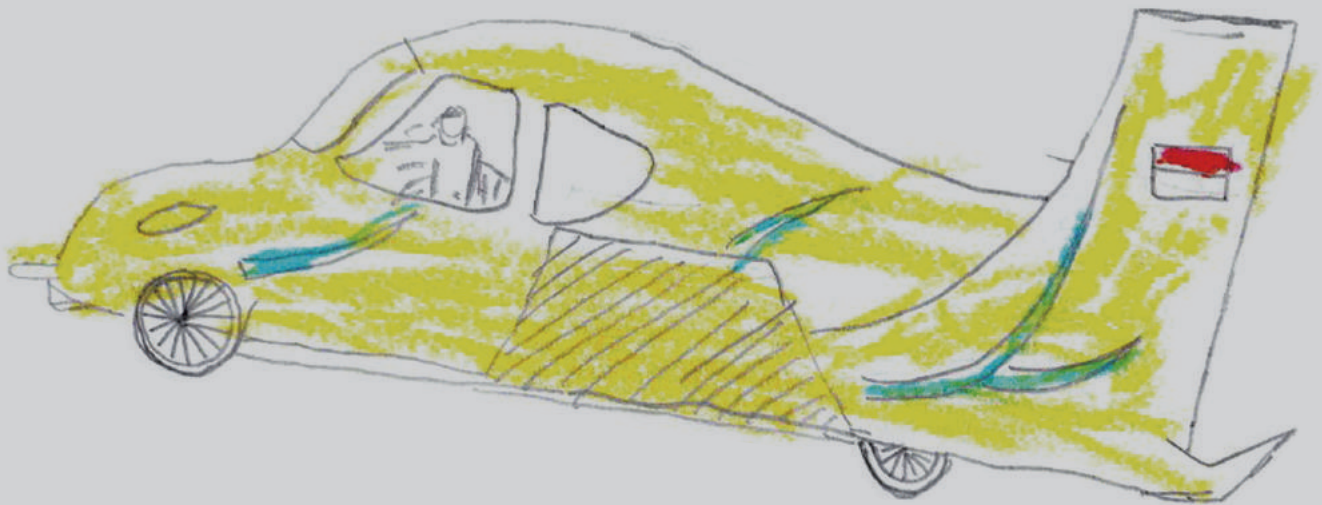
Parents

Children

Key Findings
in Thailand

Key Findings in Thailad

1

Sedans and Pick-ups are the mainstream of "Now".
Much less favored as a "Future" car.
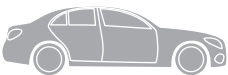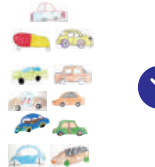
Now	Future

Comparison of "what comes to mind when you hear the word car (Now)"
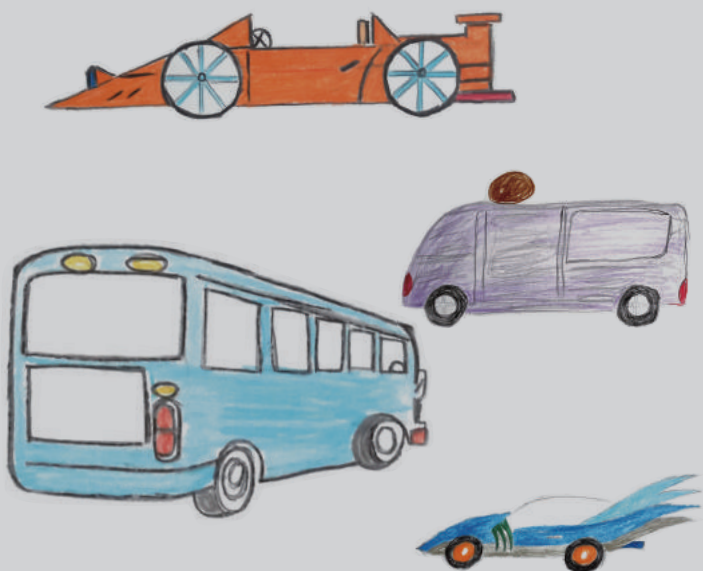and "a car you want to drive in the future (Future)".

Now   Future

	P	C	P	C
Sedan				
Total number (comparison now and future)	26		9	
Corporate brand	0	0	0	0
Product brand	0	0	0	0

	P	C	P	C
Pick-up				
Total number (comparison now and future)	15		6	
Corporate brand	0	0	0	0
Product brand	0	0	0	0

Drawings of Sedans and Pick-ups from Now and Future.

Parents   Children

Key Findings in Thailad

2

MPVs and Sports Cars are favored
as a "Future" car!
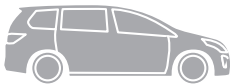
| Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)"
and "a car you want to drive in the future (Future)".

Now   Future

MPV

	Now P	Now C	Future P	Future C
Total number (comparison now and future)	4		20	
Corporate brand	0	0	0	0
Product brand	0	0	2	0

Sport

	Now P	Now C	Future P	Future C
Total number (comparison now and future)	3		13	
Corporate brand	0	0	0	2
Product brand	0	0	1	1

— Drawings of MPVs and Sports Cars from Now and Future. —

Parents   **Children**

Key Findings in Thailad

3

Influenced by the bicycle boom in recent years?!
Bicycle drawings to the subject of "Car Drawing"

Now

───── Drawings of bicycles as "what comes to mind when you hear the word car (Now)". ─────

Parents

Children
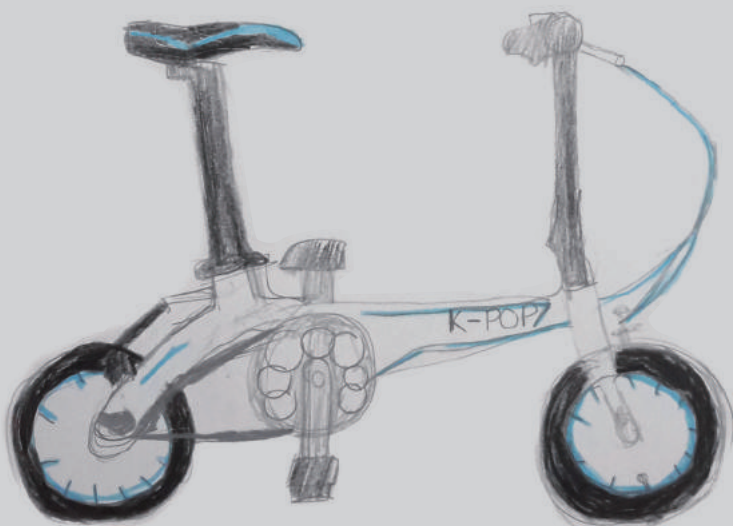
[Comment from Hakuhodo researcher]　　□ Ampa from Thailand

Sedan, once a symbol of premium status is decreasing widespread caused by changing in perception from 'I am rich' to 'I am hip – smart & rich & modern'. People require not only 'premium' qualities but they also want to make a smart choice, which clearly reflects in the increase in popularity of high-end MPVs. Moreover, it tends to fit with 'smart & flexibility' choices in terms of both product design and function that meet people's changing needs and lifestyles (e.g. startup trend or biking respectively). In addition, the strong popularity of Sports Cars still gear towards reflection of 'outstanding self-image' and 'product performance' while the 'Pick-up' is viewed as a tough car for heavy loading and shipping only.

Key Findings
in Malaysia

ASEAN Sei-katsu-sha magazine Vol.2
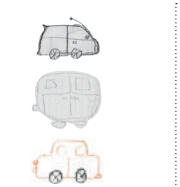Car Drawing Survey

Key Findings in Malaysia

1

Sedans and Compact Cars are the mainstream of "Now".Their popularity as a "Future" car falls.
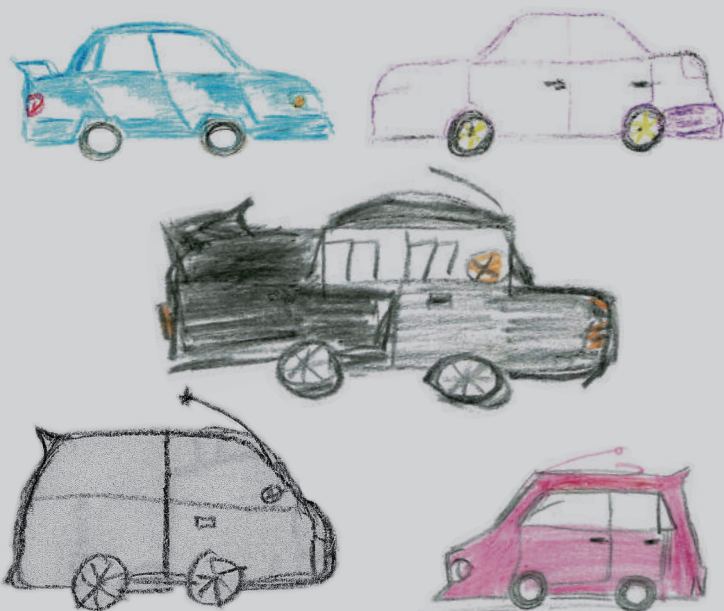
| Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)" and "a car you want to drive in the future (Future)".

	Now		Future	
	P	C	P	C
Sedan				
Total number (comparison now and future)	32		19	
Corporate brand	0	0	1	5
Product brand	11	11	6	6

	Now		Future	
	P	C	P	C
Compact Car				
Total number (comparison now and future)	12		6	
Corporate brand	0	0	0	0
Product brand	6	5	3	3

Drawings of Sedans and Compact Cars from Now and Future.

Parents　　　　　　　　　　　　　　　　　　　　　　**Children**

Key Findings in Malaysia

2

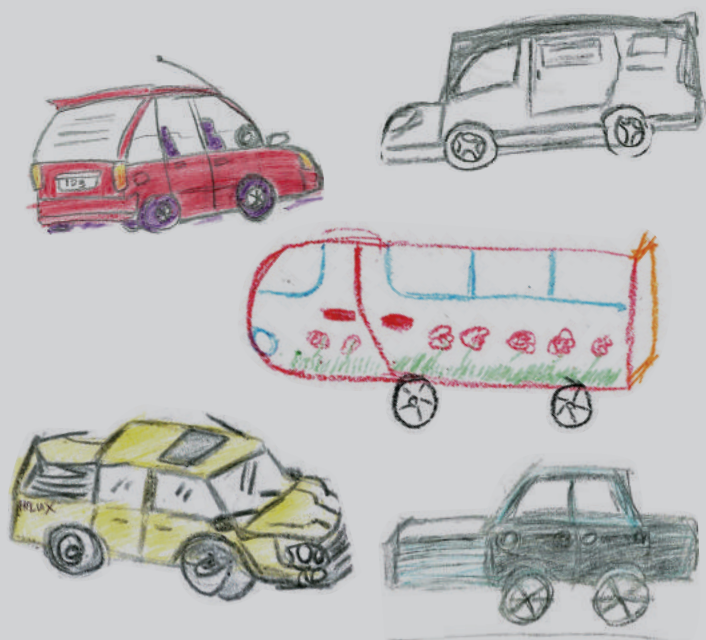MPVs are popular in the future!
Pick-ups might have a chance?

| Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)"
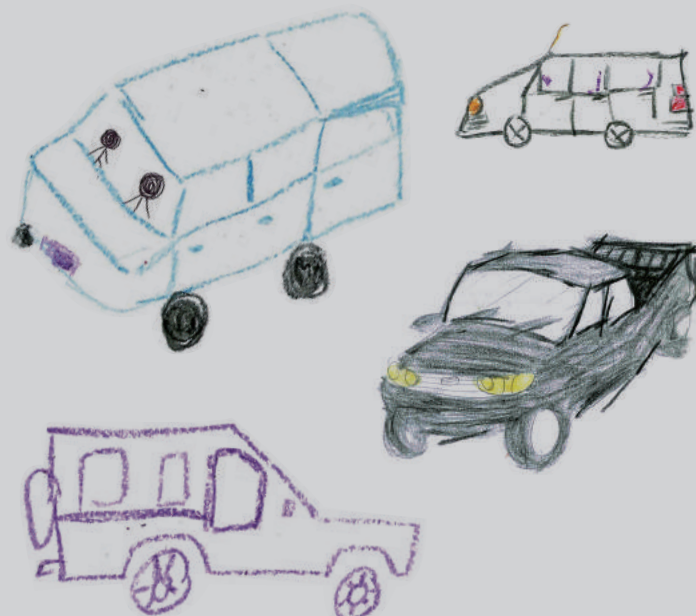and "a car you want to drive in the future (Future)".

Now — Future

MPV

	Now		Future	
	P	C	P	C
Total number (comparison now and future)	11		17	
Corporate brand	0	0	2	0
Product brand	11	3	10	2

Pick-up

	Now		Future	
	P	C	P	C
Total number (comparison now and future)	0		3	
Corporate brand	0	0	0	0
Product brand	0	0	2	1

Drawings of MPVs and Pick-ups from Now and Future.

Parents

Children

Key Findings in Malaysia

3

Some people draw Mini Cooper.
There might be a respect for the British brands
even though the actual sales of the brand is not notable.

Now | Future

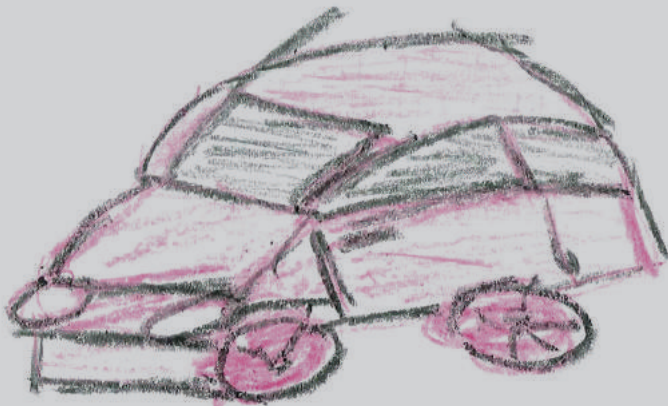Drawings of Mini Coopers from Now and Future.

Parents

MINI COOPER

Children

Mini Copper

Key Findings

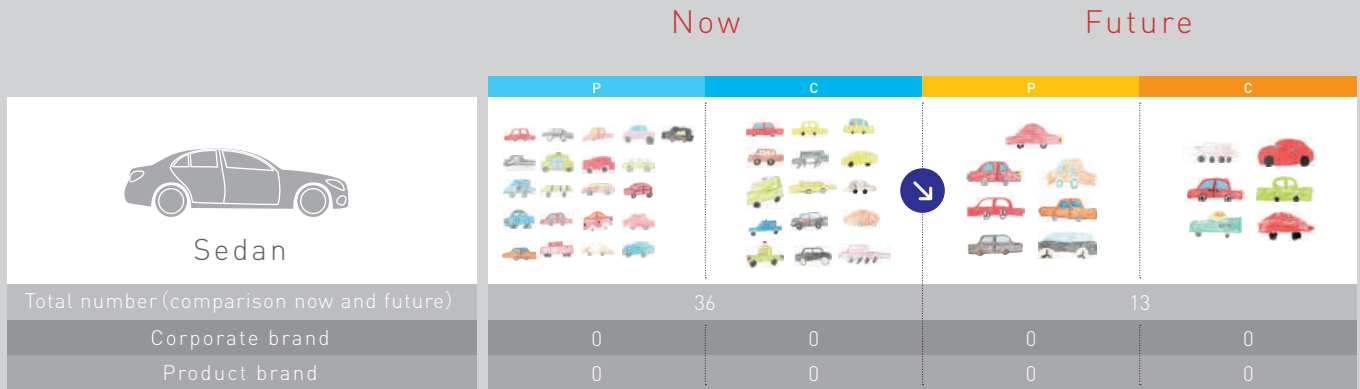# in Vietnam

Key Findings in Vietnam

1

Sedans, the absolute cars of "Now"!
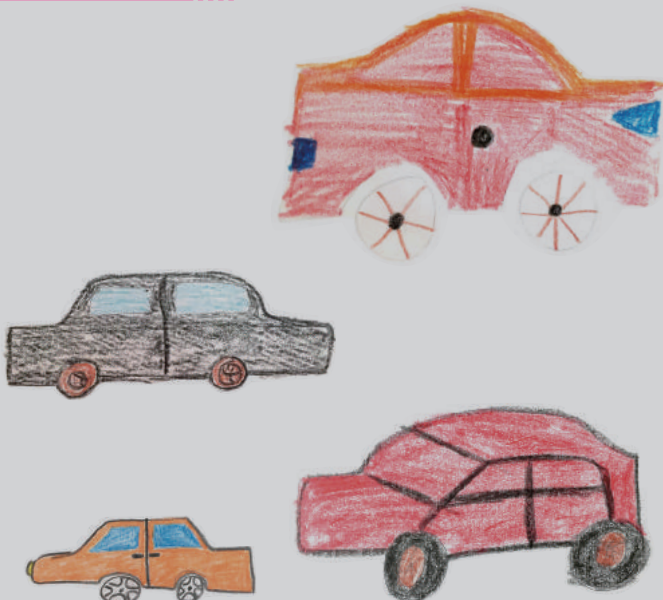Popularity as a "Future" car sinks.

| Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)"
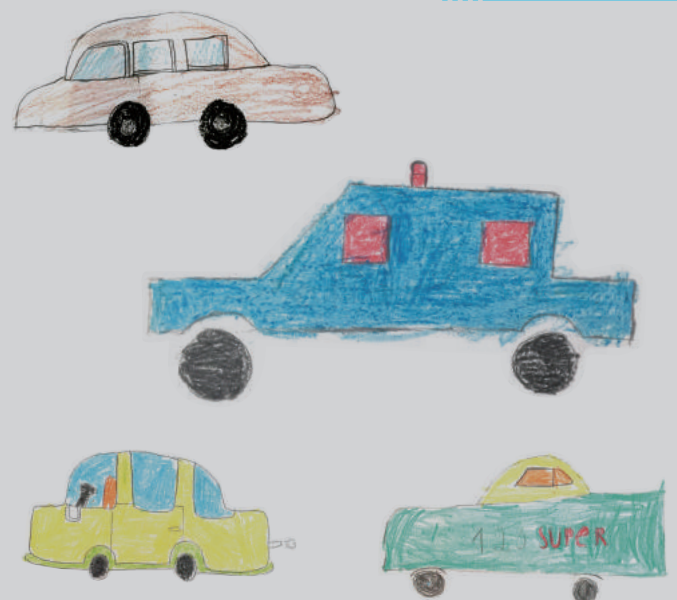and "a car you want to drive in the future (Future)".

Now   Future

	Now		Future	
	P	C	P	C
Sedan				
Total number (comparison now and future)	36		13	
Corporate brand	0	0	0	0
Product brand	0	0	0	0

*None of the descriptions had a brand name.

--- Drawings of Sedans from Now and Future. ---

Parents

Children

[Comment from Hakuhodo researcher]   □ Lien from Vietnam

In the past, only rich people could purchase cars. Sedans were considered stylish, luxurious, and "high class". Besides, most cars were used for business purposes. However, the situation is changing. Now more families can afford buying cars for family usage. MPVs are perfect choice for both family and business usage, not Sedan. Recently, there are more people who own expensive Sports Cars and they appear in daily newspapers. So that many young people aspire to have Sports Cars as they are trendy and look cool. Car penetration in Vietnam is still low. They don't have much knowledge about cars and they are also dreamers. Besides, "In the future" to them seems far future. They expect super advanced cars thanks to advanced technology development like flying cars, cars that look like UFOs, etc. Those flying cars reflect their dreams of avoiding the current heavy traffic jams in Hochiminh City due to undeveloped transport infrastructure.

Key Findings in Vietnam | 2

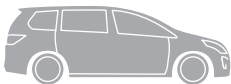MPVs and Sports Cars gain popularity
as a "Future" car!

| Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)"
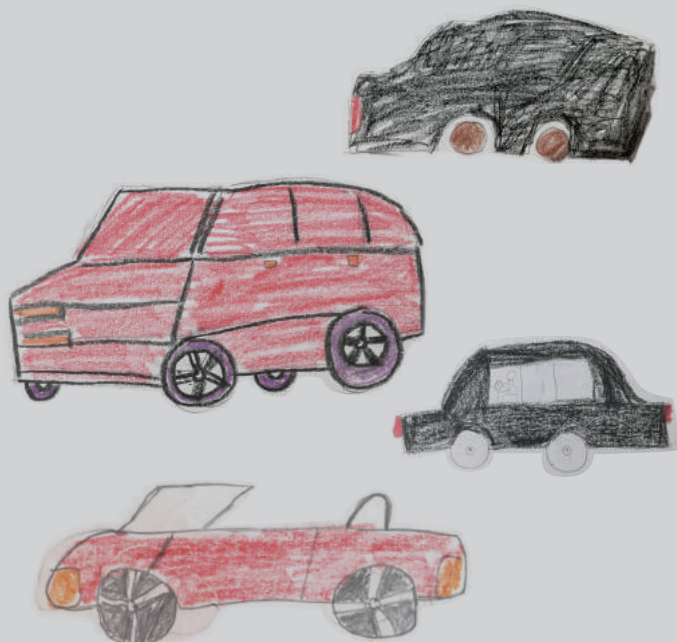and "a car you want to drive in the future (Future)".

Now   **Future**

MPV

	P	C	P	C
Total number (comparison now and future)	9		18	
Corporate brand	0	0	0	0
Product brand	0	0	0	0

Sport

	P	C	P	C
Total number (comparison now and future)	3		9	
Corporate brand	0	0	0	0
Product brand	0	0	0	0

Drawings of MPVs and Sports Cars from Now and Future.

Parents ///   \\\ Children
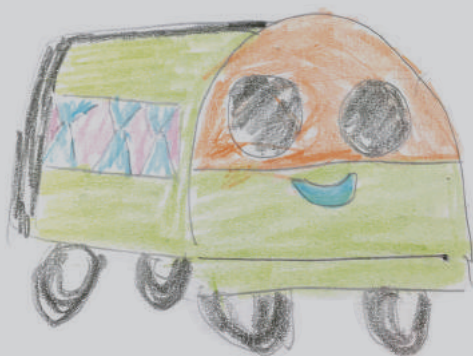
Key Findings in Vietnam

3

Reflection of the motorbike-dominated society with low car ownership rate? Lots of imaginative and vague drawings.

Future

―――――――― Drawings and their descriptions of "a car you want to drive in the future". ――――――――

Parents

Flying car
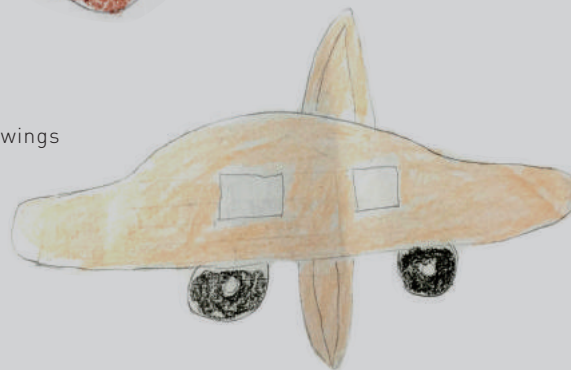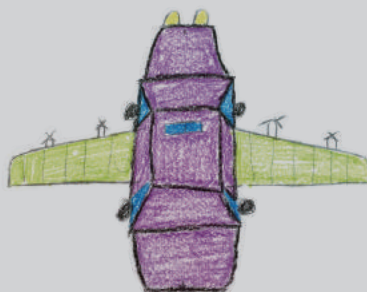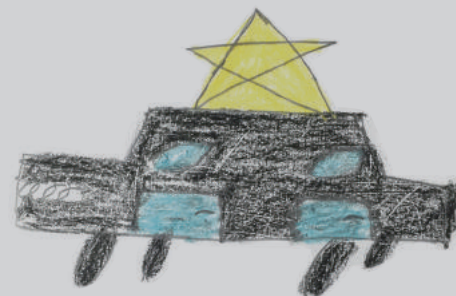
House-like car

Car with wings

Children

Flying car with wings

Turtle-like car

Car with star revolves on top in traffic and flies the car away

Car with ears

Key Findings

in Singapore

Key Findings in Singapore   1
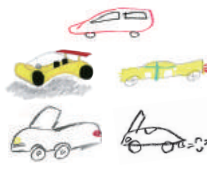
Sedans, being the majority of the cars of "Now",
lose popularity in the cars of "Future".
Sports Cars won't become much more desirable.

| | Now | Future |

Comparison of "what comes to mind when you hear the word car (Now)"
and "a car you want to drive in the future (Future)".

| | Now | Future |

Sedan

	Now	Future
Total number (comparison now and future)	14	1
Corporate brand	0	0
Product brand	2	0

Sport

	Now	Future
Total number (comparison now and future)	4	5
Corporate brand	2	1
Product brand	0	0

Drawings of Sedans and Sports Cars from Now and Future.

Children
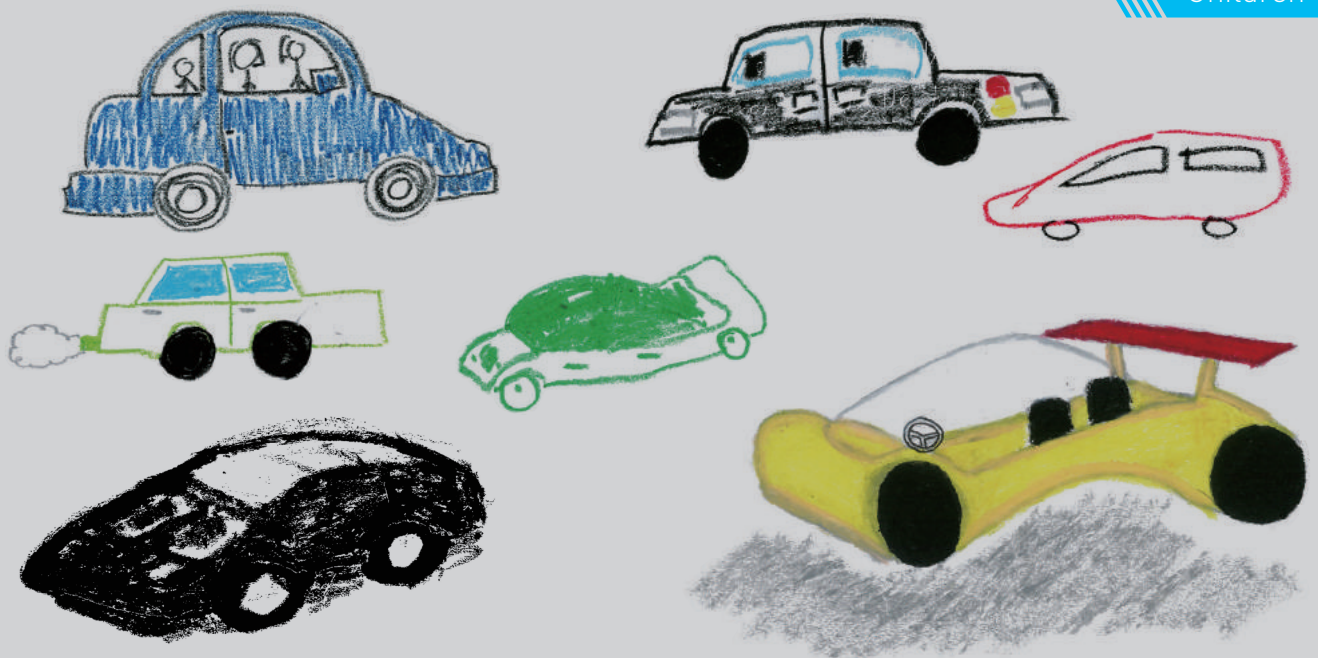
Key Findings in Singapore

2

Reflecting the educational reform focused on creativity?
Most of "Future" cars are full of imagination!

Future

— Drawings and their descriptions of "a car you want to drive in the future (Future)". —
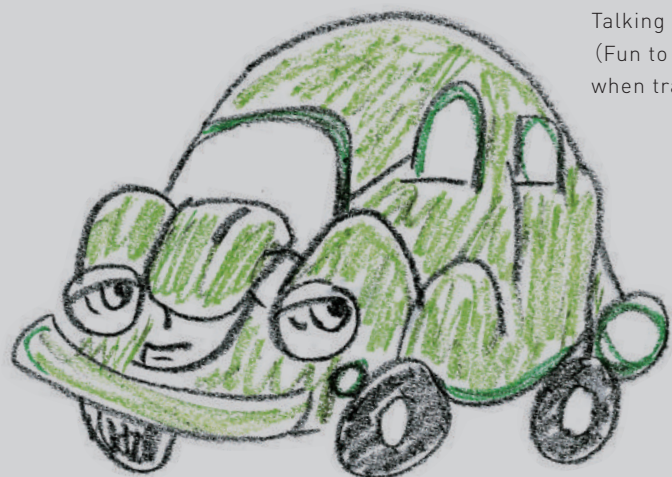
Children

Talking car
(Fun to have someone to talk to when travelling alone.)

Flying car to
avoid traffic

Animal keeping car
with a cage
(Criminals can be
captured as well.)

Amphibious transforming car

Flying Disco Car

turn
into

Shoe-shaped car
(Fun to watch on the street.)

Underwater car
with fish viewing system

Car Drawing Survey Summary

Implications of Key Findings
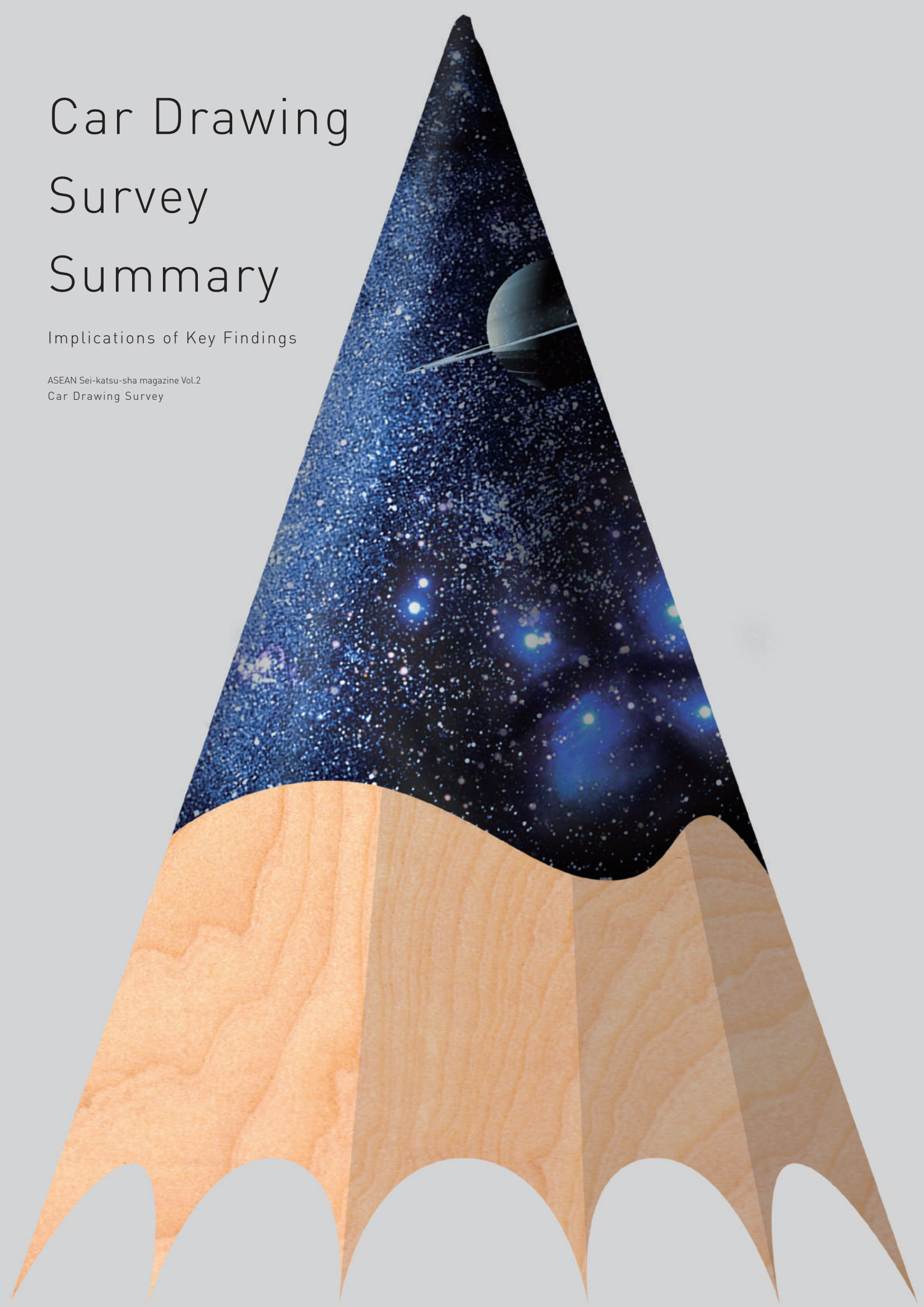
Implications of Key Findings in the Five ASEAN Countries

① Sedans will be on a downward trend in all five countries.

② MPVs will be popular in four countries except for Indonesia.

③ Love for Sports Cars will be present in all five countries.

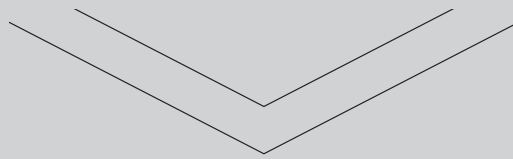## 1　A tidal shift to MPVs from Sedans and Pick-ups.

MPVs are practical body types that large families in the ASEAN countries can ride comfortably, and yet are considered luxurious status symbols. The result suggests a possible tidal shift of the body types from what has been the mainstream until now.

2　Needs for SUVs are not yet identified.

Being the type of cars often pictured now in Indonesia, SUV's popularity will remain unchanged in the future. The result shows the possibility they may not be a major car body type in the ASEAN countries, based on the car drawings of Now and Future in each country.

3　Desire for Sports Cars can be attributed to successful branding.

Preference for Sports Cars in both parents and children is consistent in each country. It suggests the possibility that they can be utilized as a marketing communication tool to increase the level of favorability for companies and brands.

Is the future predictable with a drawing survey inspired by Sei-katsu-sha?

In this issue, we endeavored to predict future trends in automobiles with an approach of people drawing pictures on the theme of cars. Future trend predictions have historically relied on statistical trend analysis or the trends of technology evolution. Although Sei-katsu-sha builds the future, it can be a valuable resource to predict the future. The survey in this issue suggests picture drawing, one of the strategies inspired by Sei-katsu-sha, to predict future trends. We believe this approach can be effective in a variety of genres. Not just automobiles, but also to forecast the future city, the future dining table and future family image, among other possibilities.

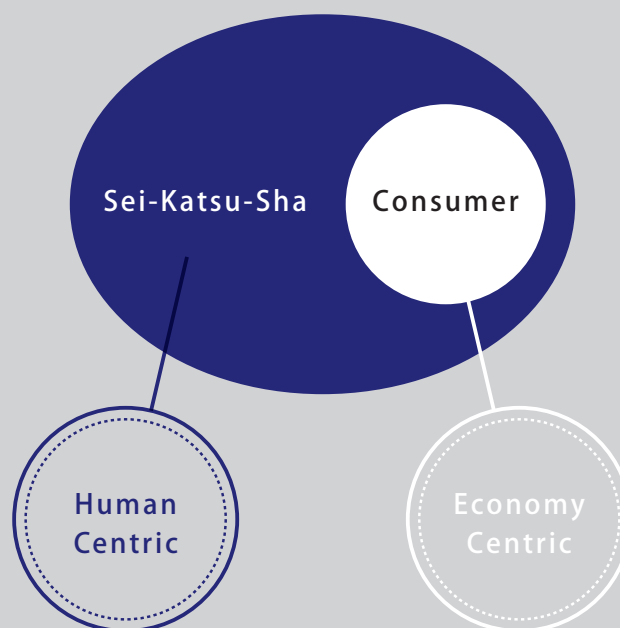# What is Hakuhodo Institute of Life and Living ASEAN?

A think tank dedicated to studying Sei-Katsu-Sha from their point of view. The whole person and the real underlying causes of their beliefs, that reflect their ideals.

Here at Hakuhodo we describe people not simply as consumers but as Sei-Katsu-Sha.

Understanding the whole person with their own lifestyles without being limited to their consumption.
Getting to the real underlying causes of their beliefs in an attempt to penetrate the products and services they desire: that's the Hakuhodo approach.

Institute of Life and Living ASEAN is a think tank observing the sense and behavior of the ASEAN Sei-Katsu-Sha as an organization that embodies their ideals.

We value the capacity both for the big picture and for the fine details. For the big picture, we conduct large-scale quantitative surveys placing importance on tracing changing Sei-Katsu-Sha patterns over time.
For the fine details, on the other hand, we bolster comprehension of deep insight of Sei-Katsu-Sha by introducing a unique methodology like the experiments conducted for this issue.

Sei-Katsu-Sha　Consumer

Human Centric　　Economy Centric