

# 2016 APRC Conference, Tokyo

Presentation by  
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President of Marketing Research Society Malaysia  
Founder and Managing Director of Compass Insights Sdn Bhd



# Theme 1 : Inviting Inbound Work Into Malaysia

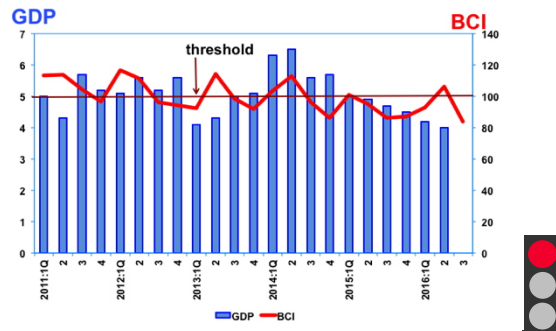


## Attractiveness of Malaysian Market

- **economy-socio-demography**
- **major consumers trends**

# Macro view of the Malaysian economy (Q1'16) – more gloomy than glowy

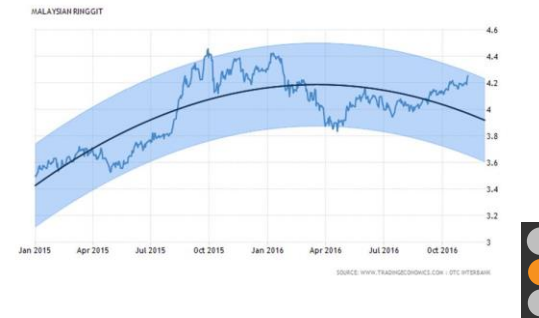
**BCI** dives below threshold point to 83.9. Business condition remains challenging with slow down in sales & production, decline in local and export orders and rising stock levels.



**Inflation rate** rises 1.5% YoY in Sept'16, slowing from a 4.2% increase in Feb'16. Price increase in food, housing & utilities eases while transportation cost declines.



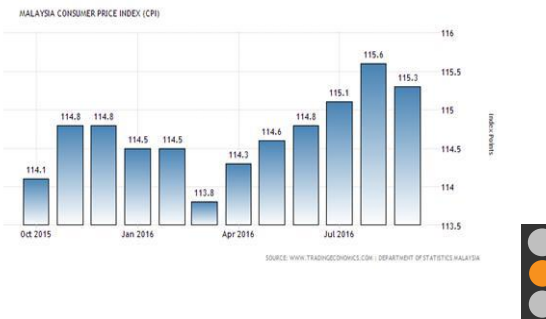
**Ringgit** is expected to trade at 4.3 by end of 2016. MYR reached all time high of 4.71 in Jan1998 and record low of 2.10 in Oct 1978



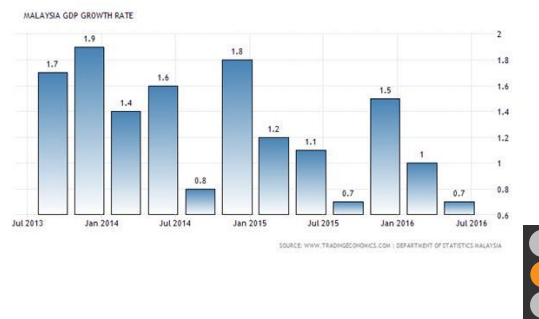
**CSI** CSI dips q-o-q to 73.6. Jobs improved, but fears of rising prices remain. As such Consumers may watch their spending. Job worries weigh on consumer sentiments



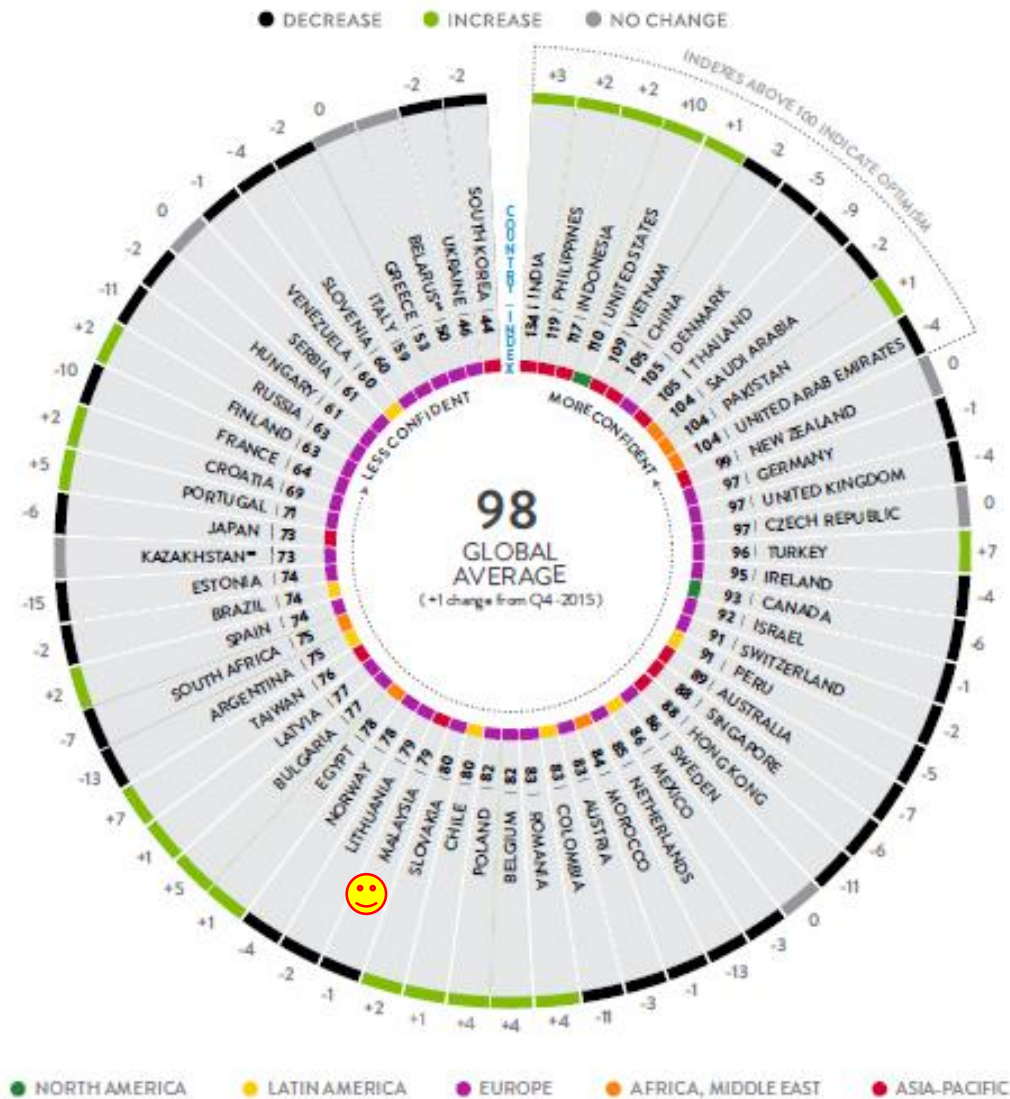
**Consumer price** decreased to 115.3 Index Points in Sept 2016 from highest 115.6 Index Points just a month earlier.



**GDP** expanded 0.7% in Q2/2016 over previous quarter. GDP growth rate averaged 1.28% from 2000 until 2016; all time high of 5.9% in Q3/2009 and record low of -7.6% in Q1/2009



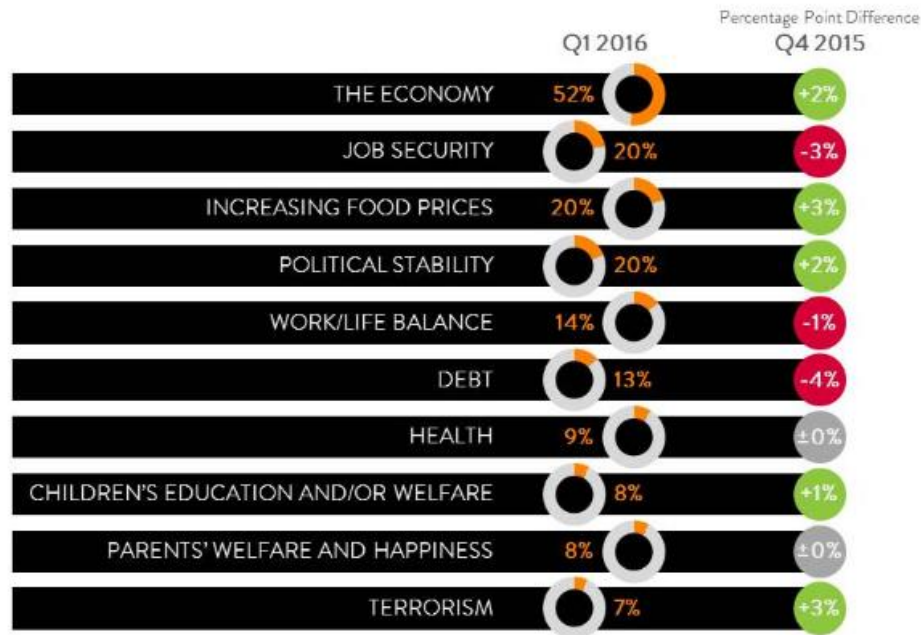
Malaysian consumer confidence remains stable at the start of 2016, at 79% (dipping one point from previous quarter).



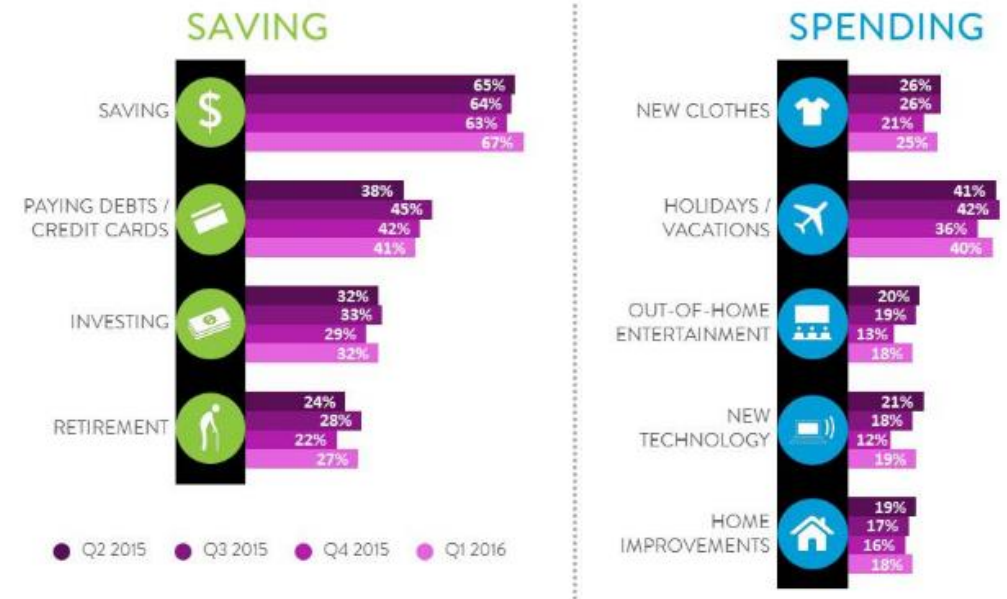
SOURCE: NIELSEN CONSUMER CONFIDENCE REPORT

**With no real changes in economic outlook, Malaysians' confidence remains low. This trend is expected to continue until the pressure on the Ringgit eases. Priority will be on savings rather than spending**

## MALAYSIANS TOP 10 MAJOR CONCERNS

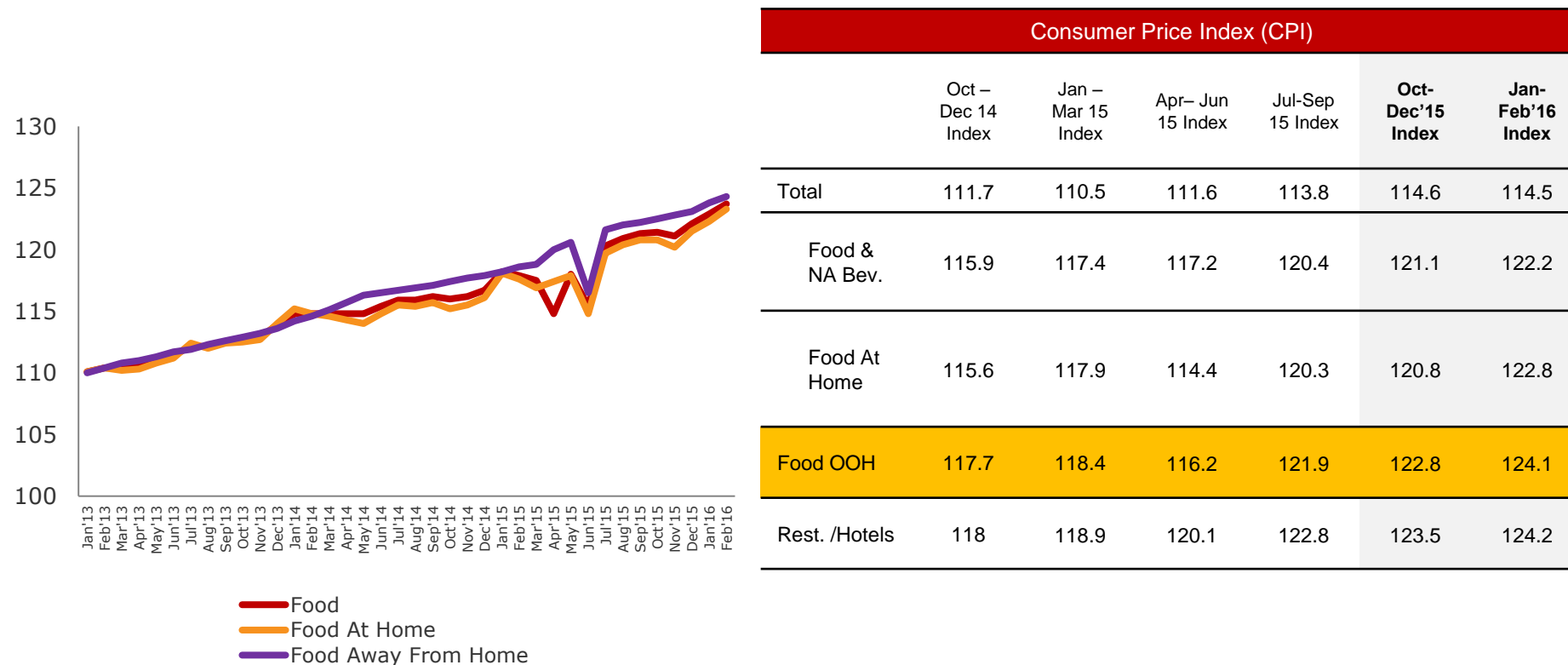


## HOW MALAYSIANS SPEND THEIR SPARE CASH IN Q1 2016



SOURCE: NIELSEN CONSUMER CONFIDENCE REPORT

# CPI for food categories (i.e. Food & Non-Alcoholic Beverages, Food at home & Food out from home) have registered slight uplift.



SOURCE : Department of statistics, Malaysia, <http://www.statistics.gov.my/>



# Both individuals & businesses are facing challenging times

- **Rising cost of living** (i.e hike in transportation fare, toll rates, natural gas, cigarette taxes, removal of rebates for electricity)
- **Declining purchasing power**



Besides the GST, Malaysian consumers and businesses have had to contend with the **hike in public transportation fares, natural gas tariff hike** for commercial and industrial users as well as **higher toll rates** for certain major highways in and around the Klang Valley.

The **drastic rise in cigarette taxes** from Nov 4 was felt by smokers and showed up in the November consumer price index (CPI).

Starting from January, **heavier users of electricity** would have to **pay more**, as rebates would be cut.



"We expect **Malaysian consumers' purchasing power will decline further**. The recent toll hikes will lead to another round of price increases in the next few months".

Budget 2016 did not provide incentives that will spur consumers' spending in next year's first half.



# Households with kids struggle to keep up with price increase for children's essential items (e.g. uniforms, stationery, canteen food, bus fares).

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FINANCE

## Going Back To School Has Never Been So Expensive

CONTRIBUTOR FINANCE JAN. 5, 2016, 4:12 AM

As children across the nation scurry back to school, parents struggle to keep up with the various price hikes that the new school year presents.

These price hikes include the cost of school supplies like stationery and uniforms, tuition fees, bus fares and even canteen food.

Parents may face additional financial burden next year as school bus operators look to hike their fares to cope with the Goods and Services Tax (GST).

## NEW STRAITS TIMES ONLINE

FRONTPAGE

NATION

BUSINESS

## School bus fares going up

BY FAREZZA HANUM RASHID - 28 DECEMBER 2015 @ 11:00 AM



Among Chinese consumers → CNY vendor sales dipped by >30%.  
Retailers are less hopeful as the unfavourable economic prospects and diminishing purchasing power are making consumers more cautious in their festive season spending



"While (demand for) quite a number of items, like Mandarin oranges, dried meat and canned seafood, are always on the rise during the festive season, I do expect some consumers like myself to settle for cheaper grades of items this time around."



Seeing students struggling in universities due to lack of money (even to eat) is not new. But with the rising cost of living, it is a serious issue now.



## Rising cost of living in Malaysia means students can't afford to eat

2049 Study International Staff  
SOCIAL BUZZ

© Jan 13th, 2016

A survey of 25,632 students in six public universities found that 96% of students questioned felt burdened by the economic situation and 74% had no money to buy meals.

More than half of respondents could only spend MYR5 / day eating (44% only eat rice with fried egg and 41% only eat instant noodles).

Issue 00409

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MALAYSIA

## Many students are struggling to afford meals – Survey

Brendan O'Malley 13 January 2016 Issue No:396



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Nation Home > News > Nation

Saturday, 9 January 2016

## Help for hungry undergrads

# Malaysian consumers are getting fast entrenched into mobile technology and digital world



## Key internet & mobile statistics



### POPULATION

29 Million

### % POP. AGE 15 – 34 YEARS

34%



### INTERNET USERS\*, % POPULATION

66%

### INTERNET USER GROWTH (2009-12)

18%



### MOBILE PHONE PENETRATION

140%

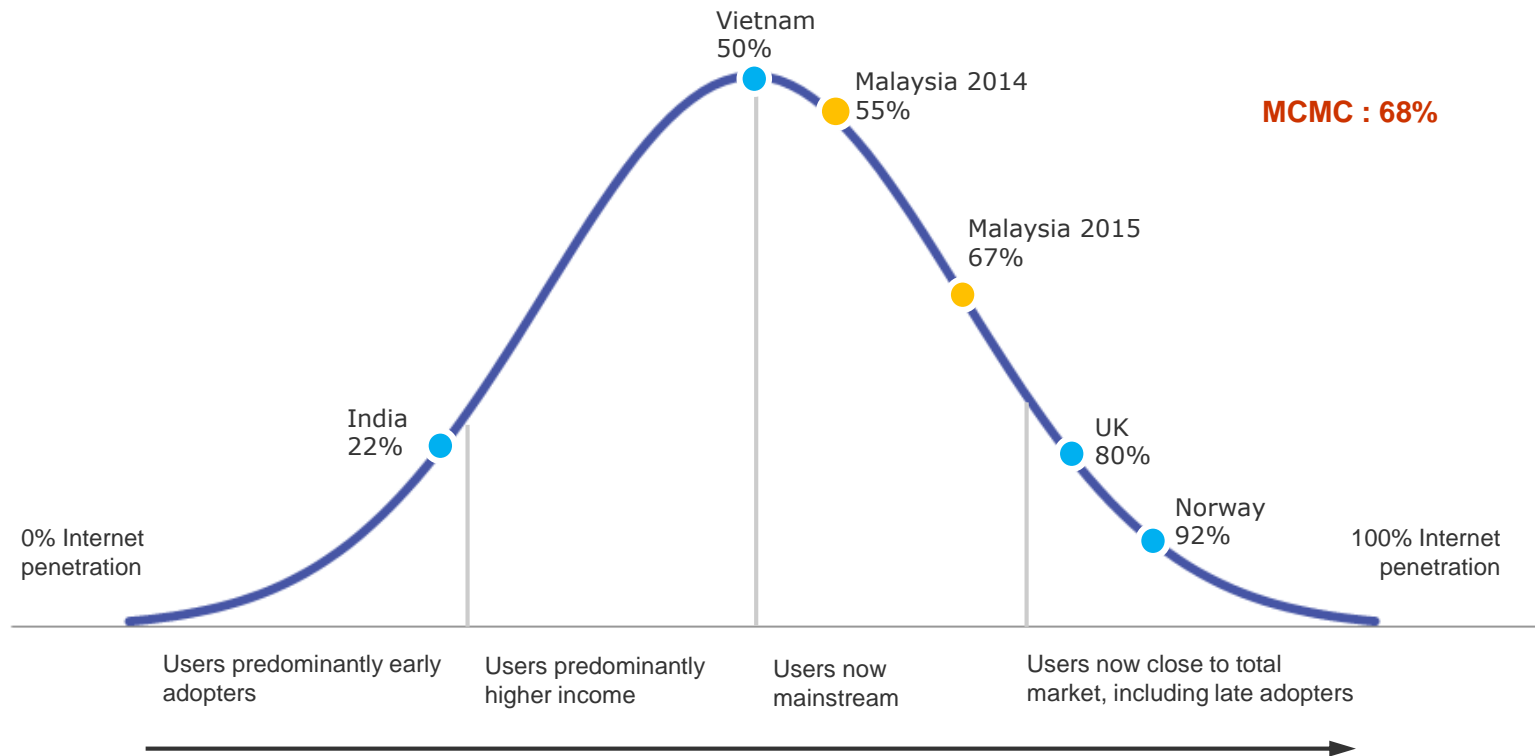
### 3G SUBSCRIPTION

10 Million

Source: The World Bank (2012), Euromonitor (2013), *Household Size Economies*: EAP (2011), Wikipedia (2014), Ministry of Communication (2011)

# Malaysia is among the most connected markets globally – Internet use is well into the mainstream

Internet penetration (weekly internet usage) bell curve for 48 markets



Source : 2014 - 2015 Google CCS Program  
Full methodology in full report (Appendix)

# Smartphone penetration growth is pronounced since 2014, with all other devices seeing uptake as feature phones further die out

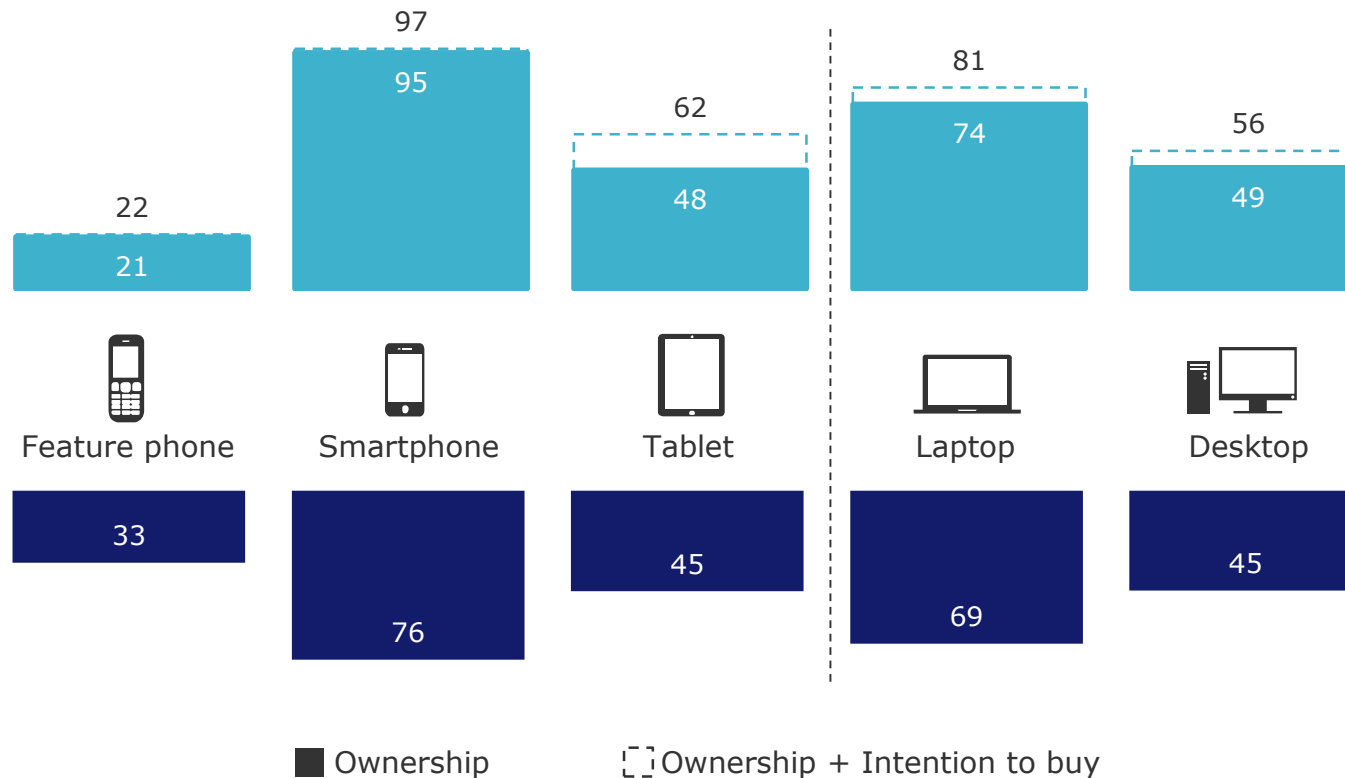
## Device ownership %

Malaysia 2015:  
Average number of  
devices owned\*

3.0

Malaysia 2014:  
Average number of  
devices owned\*

2.9

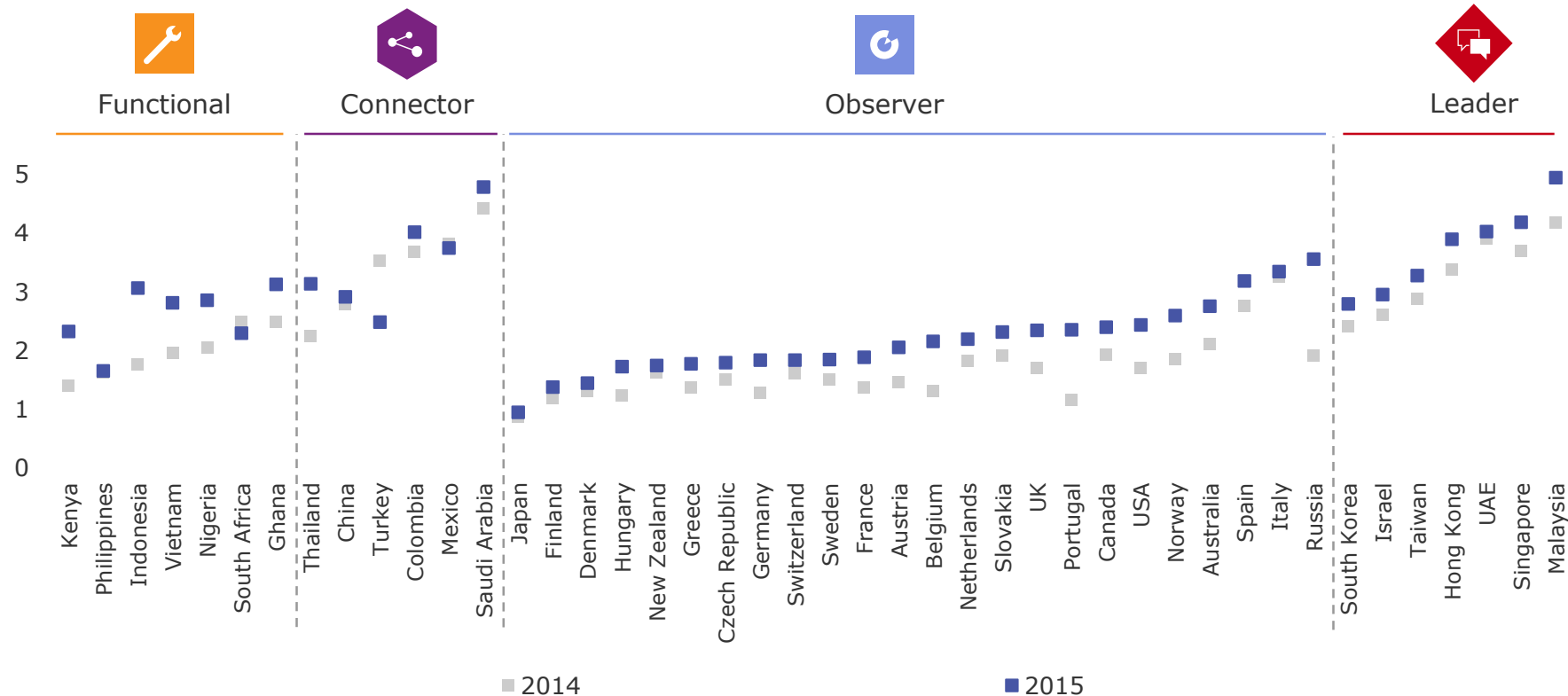


SOURCE: TNS CONNECTED LIFE REPORT 2015

# Malaysia is the strongest Leader market globally! (in terms of how socially active they are on internet and instant messaging)

## Fragmentation of social and IM platforms

Average number of platforms used daily



Based on 3 Social Engagement Attributes and 7 Digital Influence Attributes  
Base: Global 2015 (53,495) | Global 2014 (49,302)

SOURCE: TNS CONNECTED LIFE REPORT 2015



# Top 5 consumer trends in Malaysia



- Facing multiple financial issues, many consumers cut spending



- Tougher credit requirements place home ownership out of reach for many

- *Consumers' desire for home ownership unabated by rising property prices*
- *Households cutting spending to counter rising energy costs*



- Consumers increasingly shopping online



- Holiday-makers increasingly opting for domestic destinations



- Consumers preparing more meals at home, cut spending on dining out

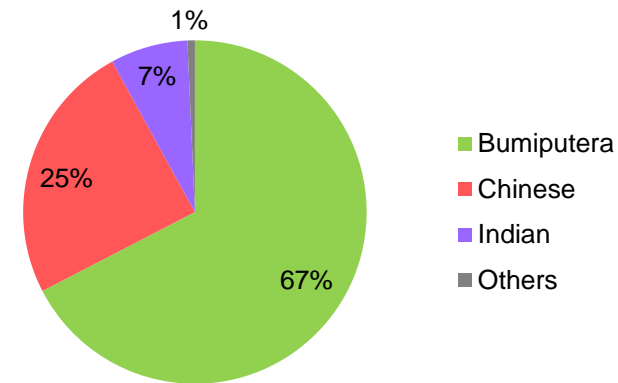
- *Consumers adopting healthier eating habits*
- *Greater demand for halal food*

SOURCE: EUROMONITOR

# Halal is big business in Malaysia

- Halal means 'permissible' in Arabic.
- Large majority of the population in Malaysia comprises of **Malay Muslims**.
- Malaysia is leading **global halal hub** with an annual export value of RM35.4 billion for halal products, which contributes approximately 5.1% of the total exports for the country.
  - Estimated global market value for Halal business is USD2.30 trillion.
- **JAKIM** (Department of Islamic Development Malaysia) was world's first halal certification body responsible for monitoring halal industry → leading to amendment of Malaysia's Trade Description Act in 2011 → this gives JAKIM much stronger mandate to **regulate the halal industry**
- Malaysia plays host to 2 most important **annual halal events**, playing pivotal role in building Malaysia's reputation as **global reference** and **trade centre** for new mainstream halal industry since 2003
  1. Malaysia International Halal Showcase (MIHAS)
  2. World Halal Forum (WHF)
- With **government's** full support and heavy involvements, Malaysia's credibility and leadership in the halal sector is recognised by **Organisation of Islamic Cooperation** (OIC).
- Malaysia provides the world's first **halal in-flight catering** on board its national carrier, Malaysia Airlines.
- Malaysian halal standard is now widely used by even renowned MNCs such as Nestlé, Colgate Palmolive and Unilever.
- Malaysia's halal portfolio expanded beyond food and beverage into **cosmetics, logistics, pharmaceutical, banking** and **tourism** sectors

Malaysians' Population As At 2010



Source:

1. <http://www.itc.gov.my/tourists/discover-the-muslim-friendly-malaysia/malaysia-the-worlds-leading-halal-hub/>
2. <http://www.panduanmalaysia.com/2013/01/statistik-terkini-penduduk-malaysia.html>

# Malaysia is conducive for foreign investors

## Vibrant Business Environment

- Market-oriented economy
- Well-developed financial and banking sector, including the Labuan International Financial Exchange
- Wide use of English, especially in business Legal and accounting practice based on the British system
- Large local business community with a long history in international business links
- Large foreign business community in all business sectors
- Extensive trade links - country's total trade was valued at RM1.31 trillion (2012)

## Quality of Life

- Friendly and hospitable Malaysians
- Safe and comfortable living environment
- Excellent housing, modern amenities, good healthcare and medical facilities
- Excellent educational institutions including international schools for expatriate children
- World-class recreational and sports facilities
- Excellent shopping with goods from all over the world

## Developed Infrastructure

- Network of well-maintained highways and railways
- Well-equipped seaports and airports
- High quality telecommunications network and services
- Fully developed industrial parks, including free industrial zones, technology parks and Multimedia Super Corridor (MSC)
- Advanced MSC Malaysia Cybercities and Cybercentres

## An Educated Workforce

- Talented, young, educated and productive workforce
- Multilingual workforce speaking two or three languages, including English
- Comprehensive system of vocational and industrial training, including advanced skills training.
- Harmonious industrial relations with minimal trade disputes

## Supportive Government Policies

- Pro-business policies
- Responsive government
- Liberal investment policies
- Attractive tax and other incentives
- Liberal exchange control regime
- Intellectual property protection

*Source: Guide On Pharmaceutical Industry In Malaysia Page12*



# Malaysian officials visit bigger countries seeking for bilateral trade deals

## Visit will bring Malaysia-China ties to a new high (video)

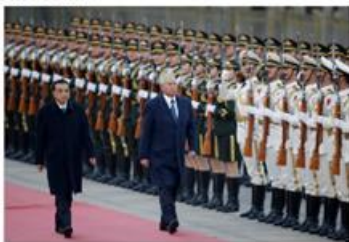
BY LIDYAH HANDBOS - 1 NOVEMBER 2014 @ 8:02 PM

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BEIJING, China: Prime Minister Datuk Seri Najib Razak said his current visit to China will propel bilateral ties between the two nations to a new high.

"We have said that bilateral relations are at a historic high, I can say that with confidence.

"But more so, this visit will bring it to a new high because the comprehensive nature of our strategic partnership has now been translated into meaningful action," he said in his opening remarks at the bilateral meeting between Malaysia and China at the Great Hall of the People here today.



Prime Minister Datuk Seri Najib Razak and China's Premier Li Keqiang inspect honour guards during a welcoming ceremony at the Great Hall of the People, in Beijing, China, November 6, 2014. Reuters

Najib also thanked his counterpart Li Keqiang, seated across from him, for the warm welcome given to the Malaysian delegation.

"It's warm in the room, but outside it's a little cold," Li replied in jest.

The weather in Beijing is currently chilly as winter approaches, with a high today of 11.7 degrees Celsius and an overnight low of -2.2 degrees.

Najib was given earlier given an official welcoming ceremony at the Great Hall of the People here today.



Malaysia's Prime Minister Najib Razak and China's Premier Li Keqiang attend a welcoming ceremony at the Great Hall of the People, in Beijing, China. BERNAMA Photo

Najib, who is on a six-day official visit, was welcomed on arrival by China prime minister Li Keqiang. Also present were ministers and government officials accompanying the prime minister's delegation.

The national anthems of both countries were played, followed by Najib's inspection of the guard accompanied by Li.

The Malaysian prime minister was also given a 19-gun salute.

## Malaysia-China trade hits RM170.6 billion for Jan-Sept

11 November 06, 2016 13:47 MYT

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He said bilateral trade between Malaysia and China hit RM170.6 billion in the first nine months of the year.

"For the same period, Malaysia's imports from China rose 9.1 per cent year-on-year (y-o-y) to reach RM102.7 billion," he added.

Exports, however, dropped 8.5 per cent y-o-y to RM67.9 billion.

Lee attributed this to weakened exports in electrical and electronic products, as well as lower demand for commodities such as palm oil, liquefied natural gas and natural rubber, due to a slowdown in growth of the world's second largest economy.

He said this while delivering his opening remarks at the China (Dezhou)-Malaysia Economic Trade and Investment Corporation Seminar here, today.

He said in September, bilateral trade rose 1.3 per cent to RM21.2 billion, accounting for 16.6 per cent of Malaysia's total trade volume.

"For the same month, exports to China dropped one per cent y-o-y. This was due to the decline in exports in the manufacture of metal and petroleum products.

"Imports from China, however, grew three per cent y-o-y," he said.

Meanwhile, Malaysia External Trade Development Corporation's (Matrade) ASEAN Unit Director, Raja Badruinizam Raja Kamalzaman said the January-September bilateral trade performance was the first deficit recorded between China and Malaysia for this year.

"We hope by end-2016, trade will grow and match last year's performance," he added.

He encouraged more small and medium enterprises to invest in e-commerce, retail shops or franchising to open up the Chinese market and help boost exports from Malaysia to the country.

"We also encourage more companies to adopt new, creative and innovative approaches to enter the Chinese market," Raja Badruinizam said.

He said despite China remaining Malaysia's largest trading partner, the trade volume with ASEAN, as a group, was still higher in comparison, while Singapore was Malaysia's top export destination.

"We are open to investments from any country that benefits us. We are not solely reliant on investments from China," he added.

Last year, trade between Malaysia and China rose by 11.1 per cent y-o-y to RM230.9 billion. Exports to China jumped 10 per cent y-o-y to RM101.3 billion.

—BERNAMA

## Najib's visit to Germany a major boost for bilateral ties, trade

By Bernama - 27 Oct 2016, 8:05 am - Updated: 28 Oct 2016, 12:09 pm

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Najib's visit to Germany a major boost for bilateral ties, trade

Najib: Malaysia may consider sending more students to Germany

Key 'value and built' in palm oil industry, assures Najib

Justice must be done to those responsible for downing MH370, says PM

PM: Apes adopts same stance as G20 in fighting terrorism

Najib hopes disinformation about TPPA will be dispelled

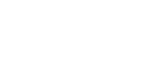
PM: American firms happy Malaysia joined TPPA

TPPA gaining more momentum, says Muzale

AsiaAsia Rights to Chemical diverted due to thick fog

Shahzad on Indian celebrity in India

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Prime Minister Najib Razak's official visit to Germany

Prime Minister Najib Razak's official visit to Germany is a major boost for bilateral ties, trade and investment climate between Malaysia and Germany, which has a population of about 80.6 million and is the world's fourth largest economy.

The visit gave both existing and potential German investors in Malaysia the opportunity to voice out their opinions, challenges and suggestions directly to the country's premier.

"They (businesses) were very pleased to be given the opportunity to engage directly with the head of the government. It demonstrates our commitment to further encouraging their businesses in Malaysia," said Malaysian Investment Development Authority (MIDA) chief executive officer Azman Mahmud.

Germany is Malaysia's largest investor from the EU. There are a total of 400 German companies in Malaysia. In the first six months of 2016, German companies invested a total of RM6.44 billion in Malaysia. Over the last 10 years, total investments have totalled RM35 billion.

The businesses were very happy with the remarks and assurances given by the prime minister on providing the right business environment for them, he told Bernama on the sidelines of the prime minister's three-day official visit which took off with a one-hour closed door dialogue session with top businesses.

This is Najib's first visit as the country's prime minister since taking office in 2009. His visit was on the invitation of German Chancellor Angela Merkel.

Both leaders had a bilateral meeting on Tuesday.

Companies participating in the dialogue included Atotech, AWS Srafer, BMW, Daimler, Oram, Volkswagen, Infineon, Bombardier Transportation, Eninger, B Braun, Green Sugar and Bielefeld International.

Besides the dialogue session, the prime minister also had bilateral meetings with MIDA chief executive officer Rudi De Winter, Mubadair president Josef Munkner, BMW Group (Munich) senior vice president (Asia Pacific & South Africa) Hendrik von Kuennern, and Aerodata AG director strategic business development Dr Manfred Haverland.

Najib, who is also finance minister, said about RM5 billion in potential future investment was revealed by

## Ahmad Zahid's trip to India will boost bilateral ties

BY BERNAMA - 16 JULY 2016 @ 6:54 PM

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NEW DELHI: Malaysian Deputy Prime Minister Datuk Seri Dr Ahmad Zahid Hamidi's first working visit to India from Sunday (tomorrow) will boost bilateral ties between the two countries.

A spokesman for the Malaysian High Commission in New Delhi said Ahmad Zahid's visit would enhance cooperation and diplomatic relations in various sectors and fields.

"This visit is very timely as India will host the 25th ASEAN-India Commemorative Summit which is expected in the first half of 2017. It is expected Malaysian Prime Minister Datuk Seri Najib Tun Razak will attend the summit on behalf of the Malaysian government.

"Najib's visit to India will reciprocate Modi's trip during the ASEAN Summit last year. Therefore I believe many issues will be raised during Ahmad Zahid's visit to India," he told Malaysian media here, Saturday.

According to Wisma Putra, Ahmad Zahid is scheduled to arrive at Indra Gandhi International Airport, Sunday for a three-day working visit, after attending the 11th Asia-Europe Meeting Summit in Ulaanbaatar, Mongolia, which ended today.

During the visit, he is scheduled to call on India's Prime Minister Narendra Modi and meet a few Indian Cabinet ministers before leaving New Delhi for a two-day working visit to Sri Lanka on Thursday. --BERNAMA

402 reads

# Theme 2

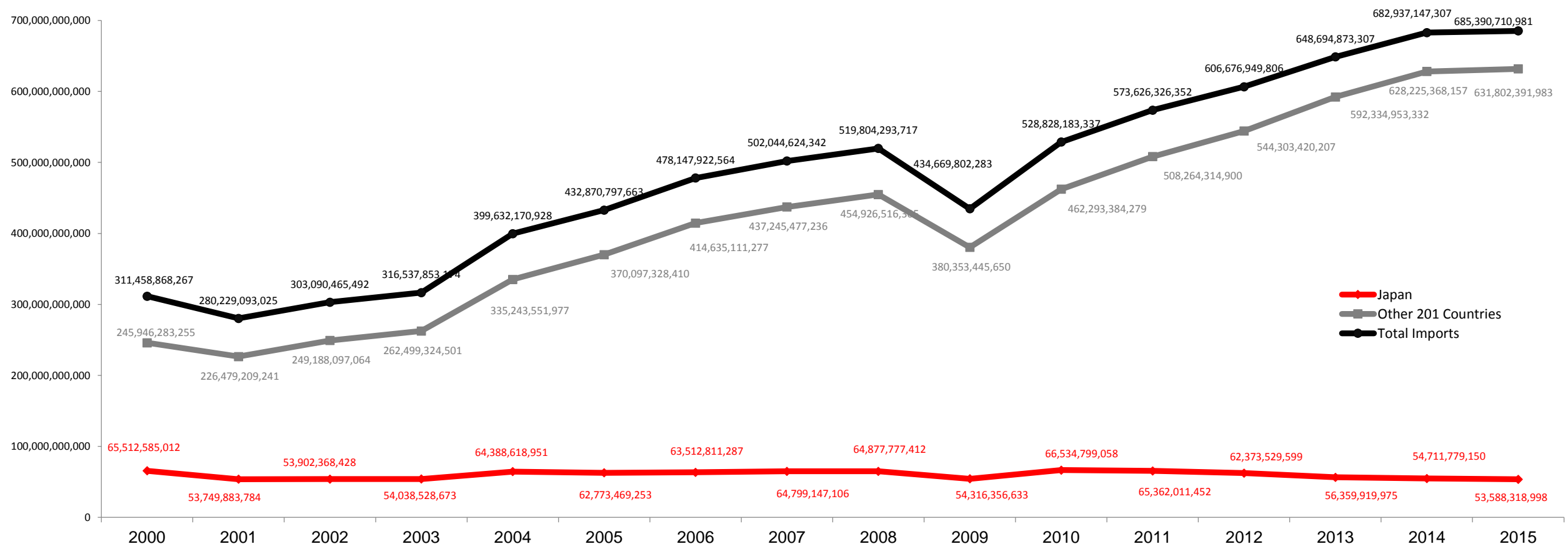


## Expectations Or Interest of Malaysians Towards Japan

- **Products/Services**
- **Tourism**
- **Cultural**

Malaysia imports from 202 countries, so it is no surprise share of Japan is only around 8% but that accounts for RM632mil

Total Import of Malaysia from Japan 2000-2015 By SITC Categories (RM)

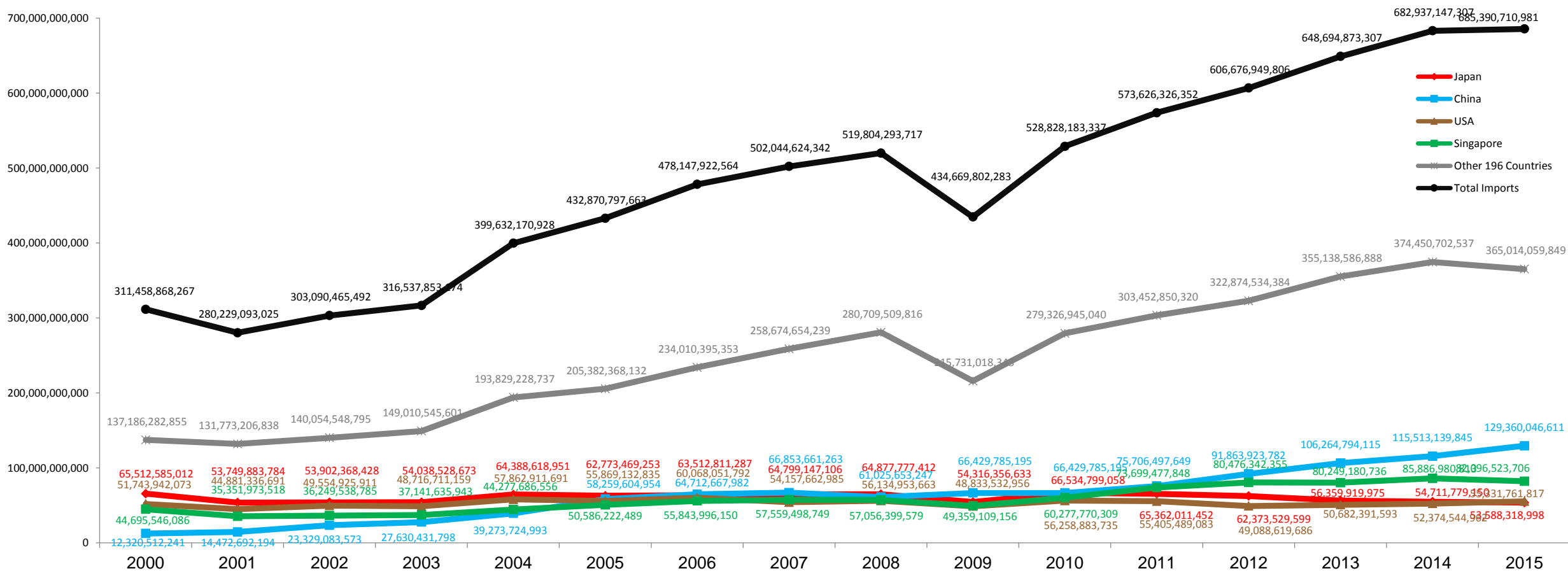


Source: <http://trade.stats.gov.my/tradeV2/>



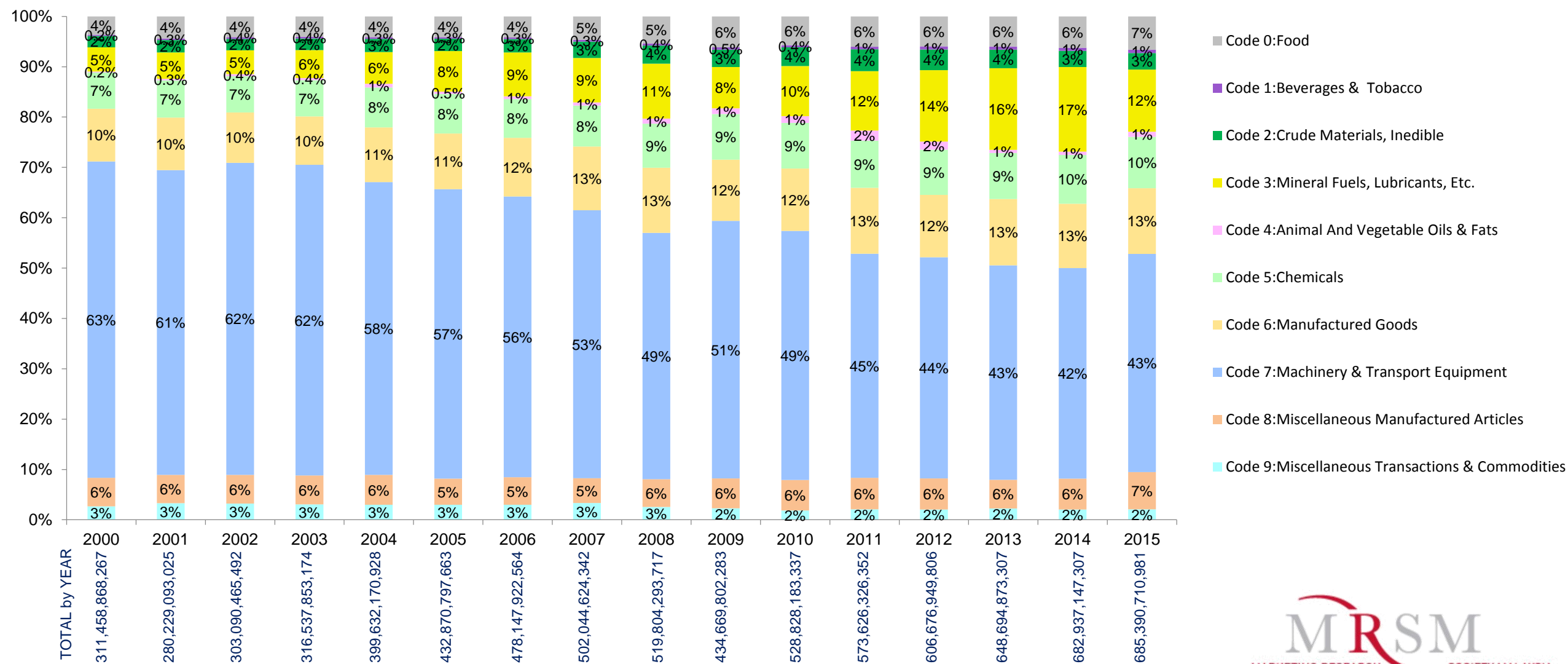
# Import from China and Singapore is growing over the years

Total Import of Malaysia from Japan & Other Countries 2000-2015 By SITC Categories (RM)

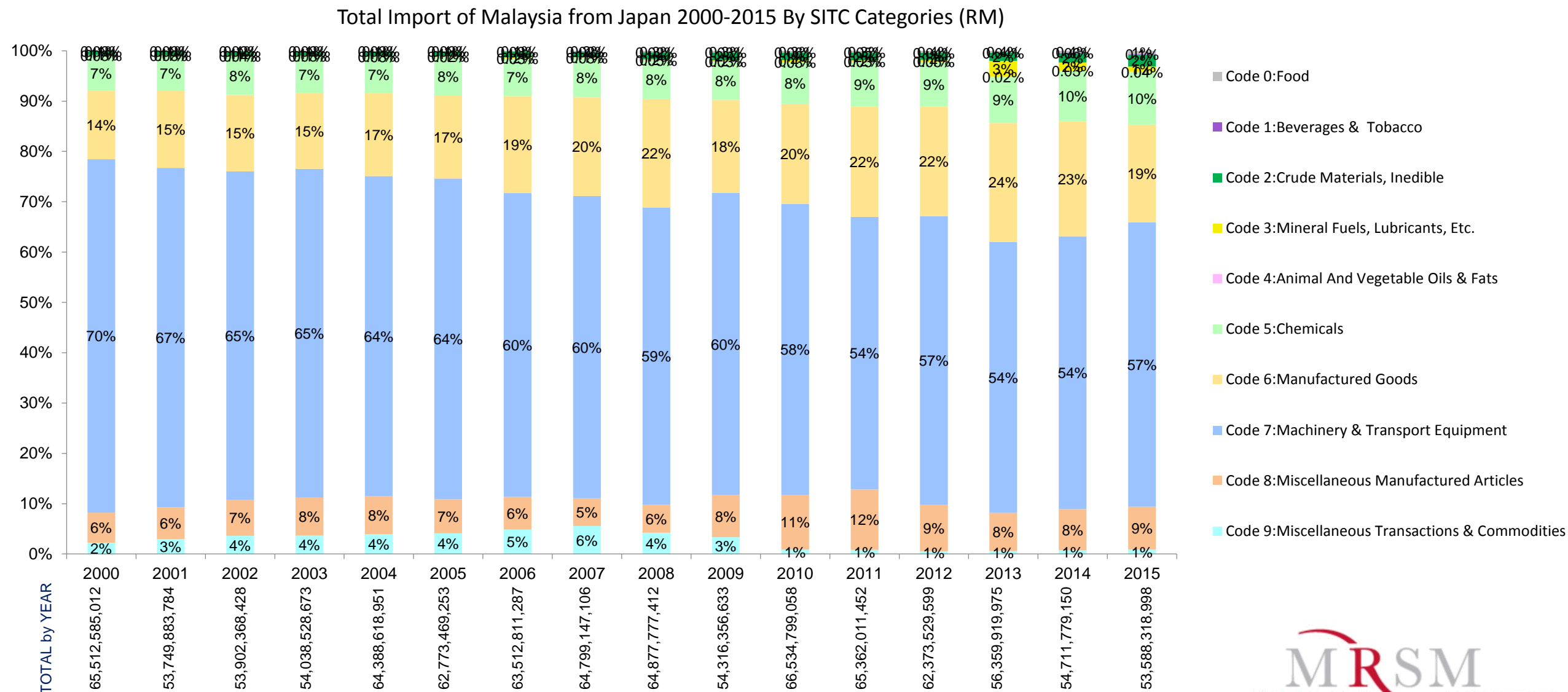


# Malaysia's biggest import is Machinery & Transport Equipment followed by Manufactured Goods, Mineral Fuels, Lubricants etc and Chemicals

Total Import of Malaysia 2000-2015 By SITC Categories (RM)

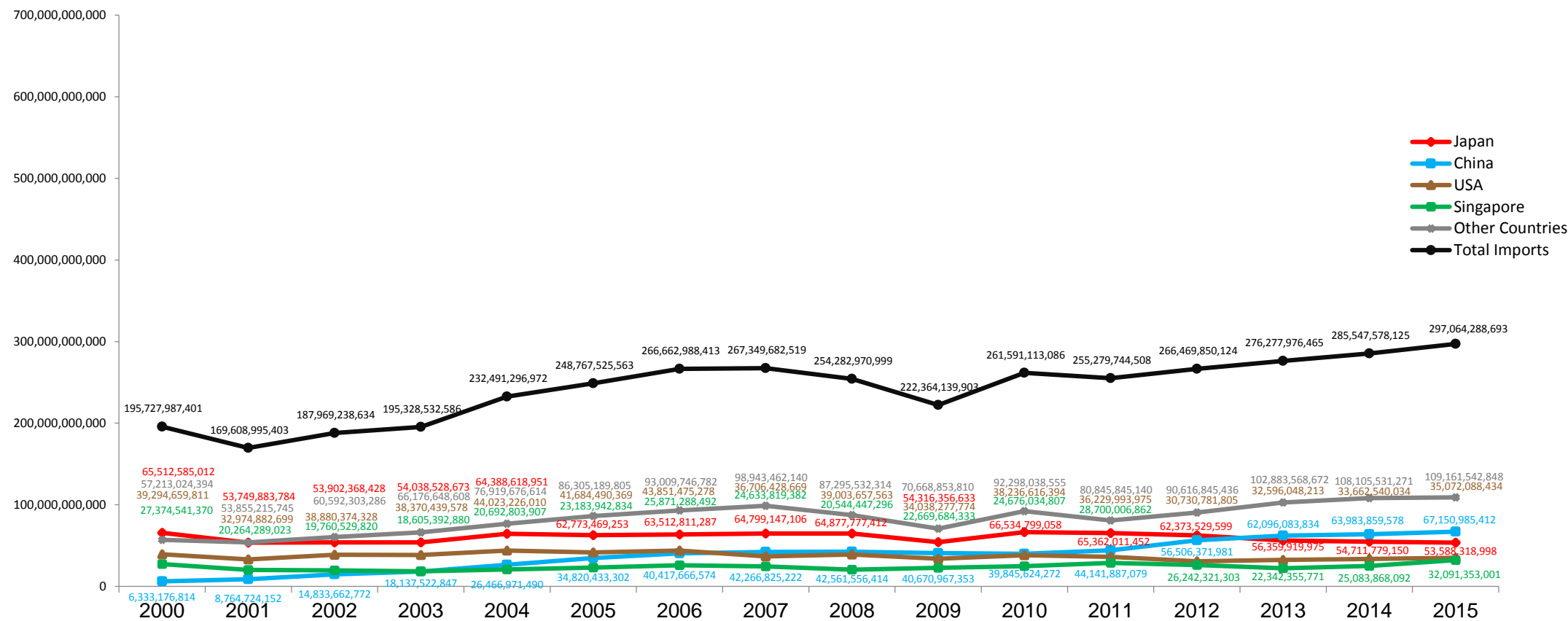


# From Japan, Malaysia biggest import are Machinery & Transport Equipment followed by Mineral Fuels, Lubricants +



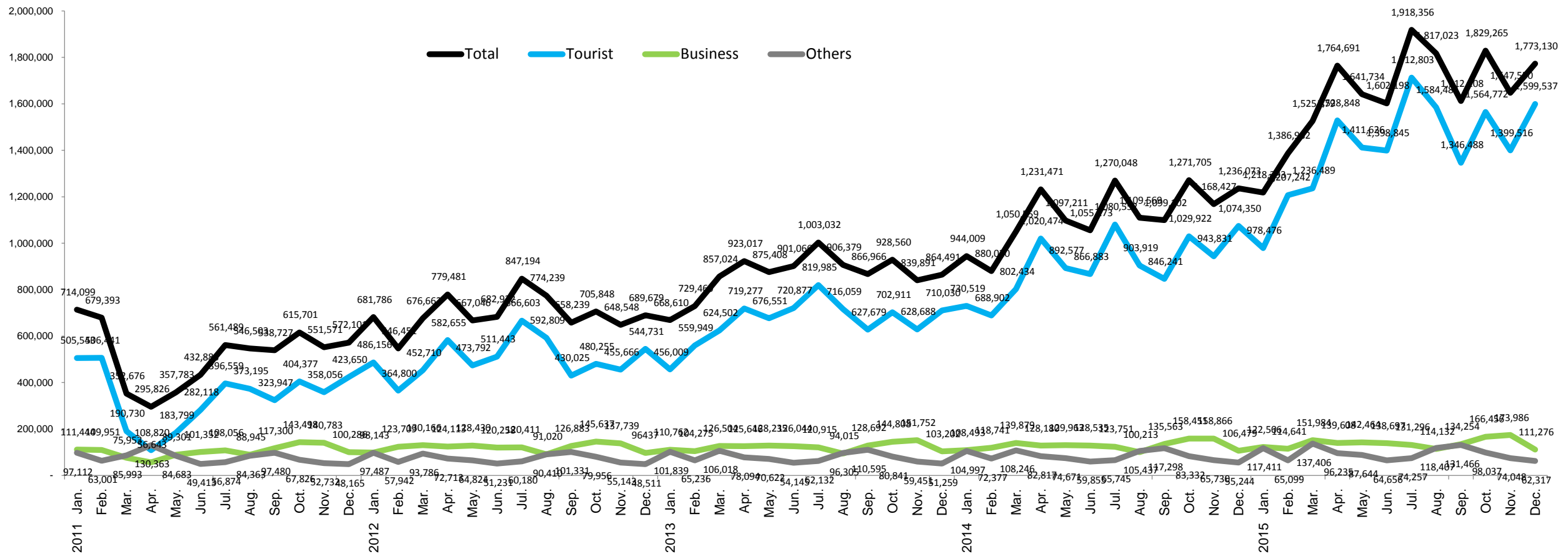
Japan is only one of several countries Malaysia imports Machinery and Transport Equipment, so plenty of opportunity for Japan to increase its share

Total Code 7: Machinery and Transport Equipment (RM), Import of Malaysia 2000-2015



# Visitors arrival to Japan is on the increase driven by Tourists

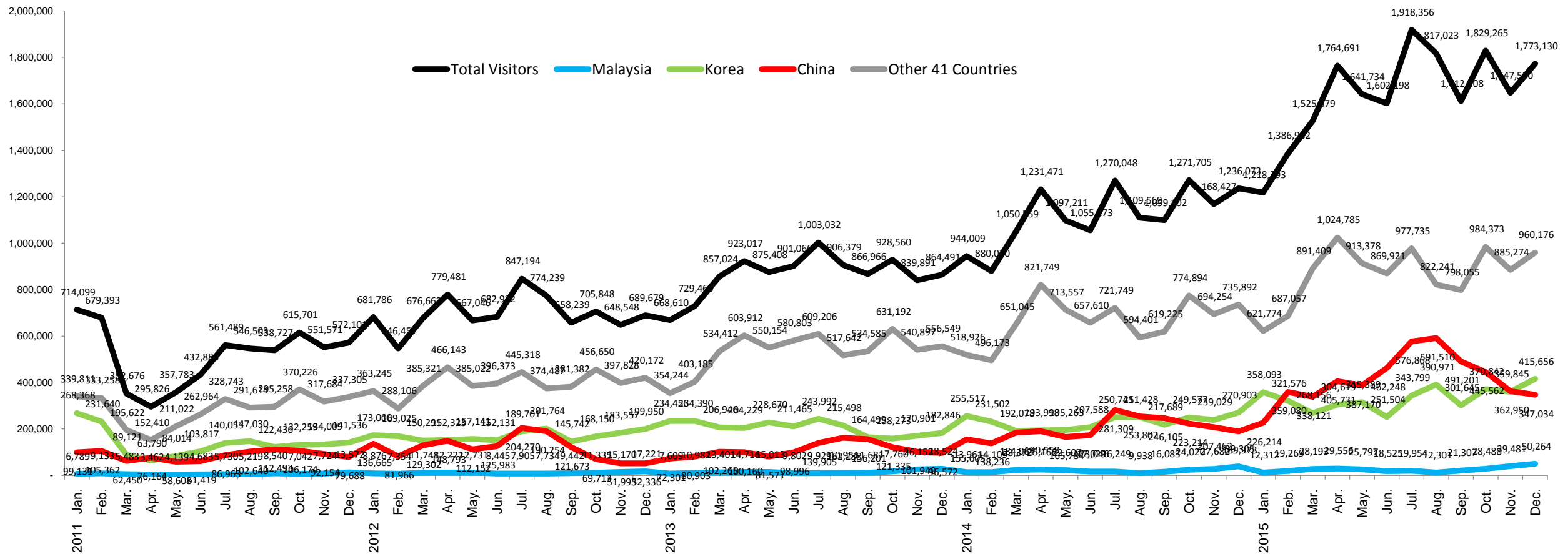
Visitors' Arrival to Japan – Total vs By Type



Source: [www.tourism.jp](http://www.tourism.jp)  
[www.tourism.jp/wp-content/uploads/2012/11/JTM\\_inbound20160526.xls](http://www.tourism.jp/wp-content/uploads/2012/11/JTM_inbound20160526.xls)

There are 44 nations visiting Japan; Malaysia has a weak minority share. While weak currency is a potential issue, plenty can be done to induce Malaysian tourists

Visitors' Arrival to Japan – Total vs By Country



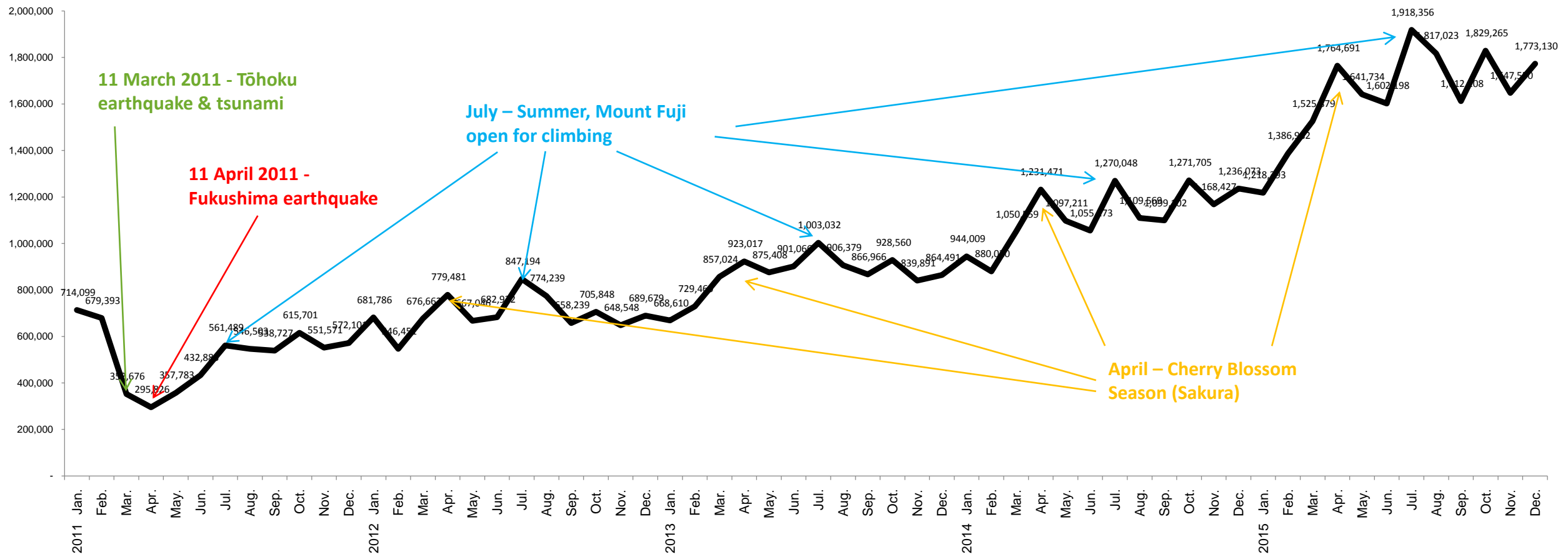
Source: [www.tourism.jp](http://www.tourism.jp)  
[www.tourism.jp/wp/wp-content/uploads/2012/11/JTM\\_inbound20160526.xls](http://www.tourism.jp/wp/wp-content/uploads/2012/11/JTM_inbound20160526.xls)





# Cherry Blossom Season appears to sharply drive visitorship to Japan, an opportunity to promote that in Malaysia

Visitors' Arrival to Japan – Total



## At traditional culture side, Bon Odori has some good opportunity for communal bonding in Malaysia

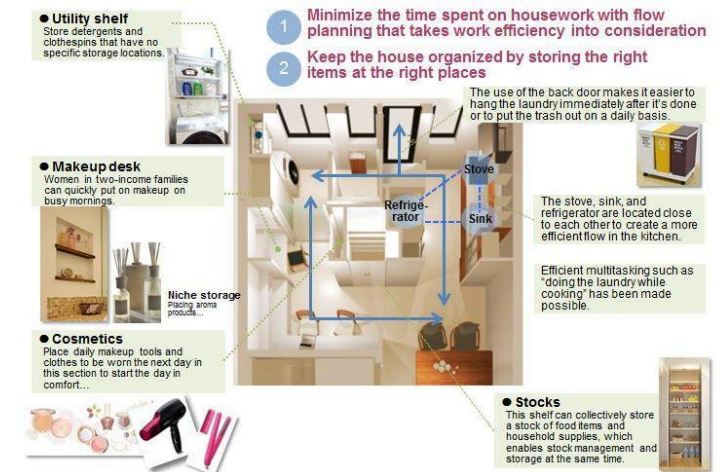
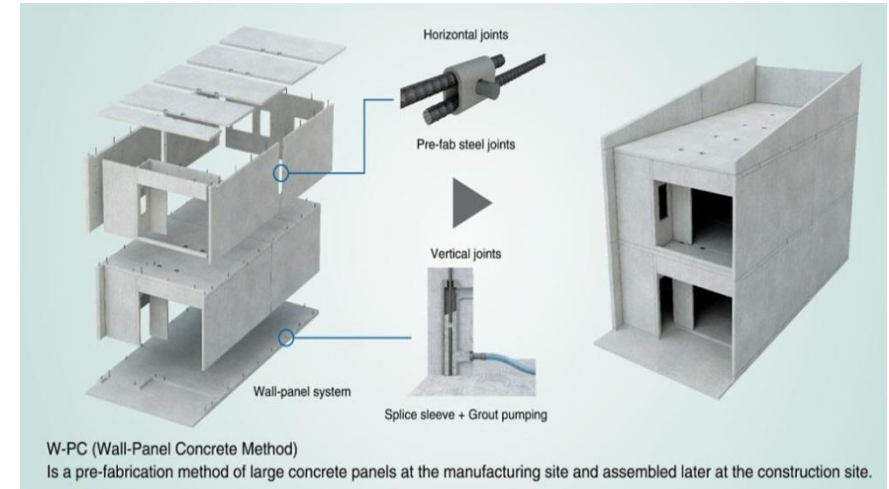


- **Obon** is a Japanese Buddhist custom to honor the spirits of one's ancestors
  - Has evolved into a **family reunion holiday**
    - people return to ancestral family places
    - visit and clean their ancestors' graves as spirits of ancestors are supposed to revisit their household altars.
  - It has been celebrated in Japan for more than 500 years and traditionally includes a dance, known as Bon-Odori.
- **Started in Malaysia 1977**
  - Celebrated yearly at Esplanade (Padang Kota Lama) Penang, Matsushita Corp Stadium in Shah Alam and Universiti Malaysia Sabah
  - Major attraction for Selangor, brain child of Japanese Expatriate & Immigrant's Society
    - Less associated with Buddhism and more with Japanese culture.
    - To expose locals to a part of Japanese culture,
    - To promote and strengthen **cultural ties** between Malaysia and Japan
    - Estimated over 30,000 people participate in the celebration

Source: <http://dancelessons.net/dancehistory/HistoryofBonOdoriDance.html>  
: <http://www.tourismselangor.my/event/bon-odori-festival-2015/>

# At traditional culture side, Japanese Concept House has clear lifestyle benefits to property buyers

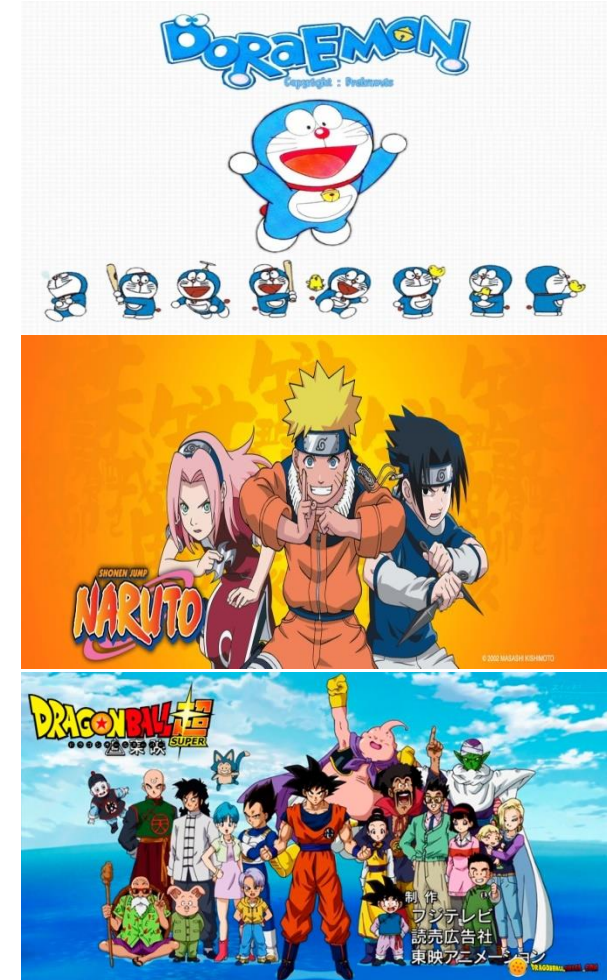
- Property purchase decisions in Malaysia typically involve 2 steps
  1. buyer first purchases house from developer with minimal interior finishing
  2. then engage interior designer to customise lighting and built-in furnitures according to preference and budget
- Provision of PanaHome MKH Malaysia's construction and Living Design Package is **one-stop solution for potential buyers**, offering a building framework with compatible interior furnishing
- Three Japan-quality PanaHome technologies is employed
  1. Wall Pre-cast Concrete (W-PC) which is **cost competitive**, leveraging on **construction expertise & know-how in Japan**
  2. PURETECH **ventilation system** filters dust and air pollutants
  3. "Kajiraku<sup>2</sup>" is **intelligently-designed house layout** and **efficient space utilisation** which enhances **security, safety** and **communication** among family members



Source: <http://www.businesswire.com/news/home/20160329006679/en/PanaHome-MKH-Malaysia-Adds-Malaysias-Housing-Industry>  
: <http://www.my-panahome.com.my/eco-ideas-house/>  
: <http://news.panasonic.com/global/stories/2016/45009.html>

## At Pop Cultural end, Animé has big demand

- Animé (short for animation), **Japanese animated cartoons**
- Animé is usually hand-drawn, but techno-trends have introduced **computer assisted illustration** into the genre
- Has a huge following in Japan, gaining worldwide recognition.
- Distributors can now release animé via
  - Television
  - Video
  - Theatres
  - Online
- Phenomenal success of Nintendo's Pokémon franchise was helped by the spinoff 1990s animé series.

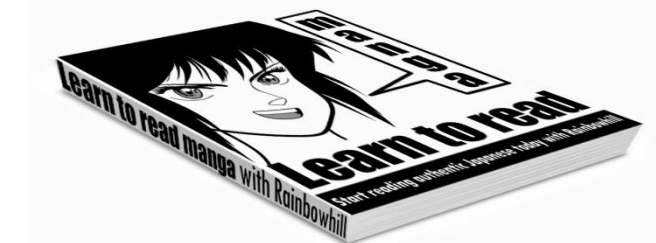


Source: <http://www.kcpstudentlife.com/culture/anime-and-manga/>



# At Pop Cultural end, Manga has big demand

- **Manga** is Japanese graphic novels or comics.
- Spans many genres
  - Romance
  - Sports
  - Games
  - Sci fi
  - Fantasy
  - Adventure
  - Horror
  - Sexuality
  - Business and so on
- Manga artists work with few assistants in a studio under guidance of publishing company's creative editor.
- In Japan alone, manga as an industry reached \$3.6 billion in 2007.
- Japan has also begun opening manga *kissa*, cafés where customers sip cappuccinos and read their manga.
- **Webmanga** are popular now with online viewing portal to buy in graphic novel form.



Source: <http://www.kcpstudentlife.com/culture/anime-and-manga/>

## At Pop Cultural end, Harajuku Culture and Trends also has some opportunity here

- **Harajuku Culture** started during the postwar Allied occupation of Japan
- The movement got a boost when 1964 Tokyo Olympics brought in waves of **tourists** and **shops** that catered to them.
- Some of the more popular and enduring **styles**
  - Cosplay
  - Lolita
  - Punk
  - Gyarū
  - Ganguro
  - Yamanba/Manba
  - Visual Kei
- **Harajuku fashion** and culture has gone international
- Regular **Harajuku-style meetings** in many countries including Malaysia
- Fashion stores (eg. Aeon) are already offering Harajuku brands in Malaysia



Source: <http://www.travelchannel.com/destinations/japan/articles/harajuku-culture-and-trends>



# Thank you