

Asian Lifestyle

- Living in a World of Experiences
- Purity and Safety Concerns for Food and Medicine
- Healthier Living with Sports
- Finer Ales and Films

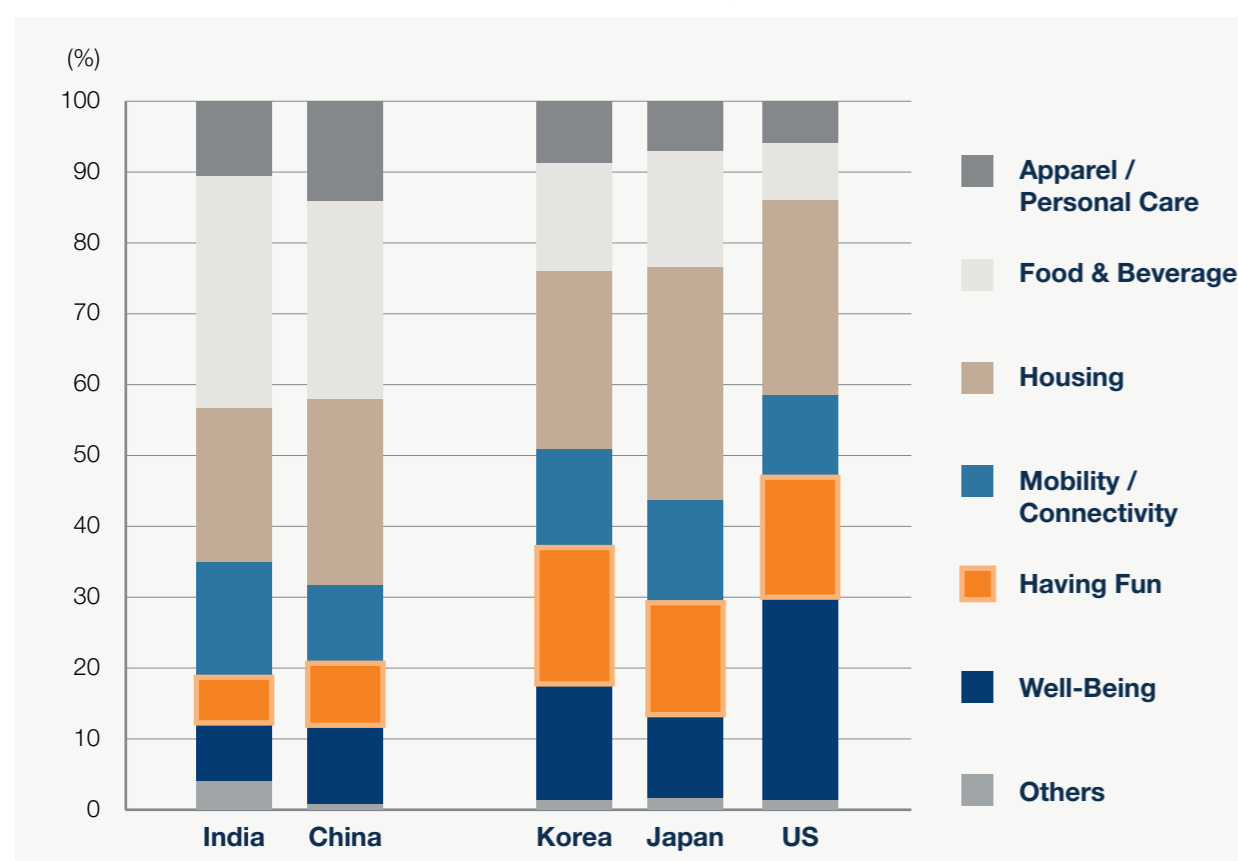
Are You Invested in Asia?



Living in a World of Experiences

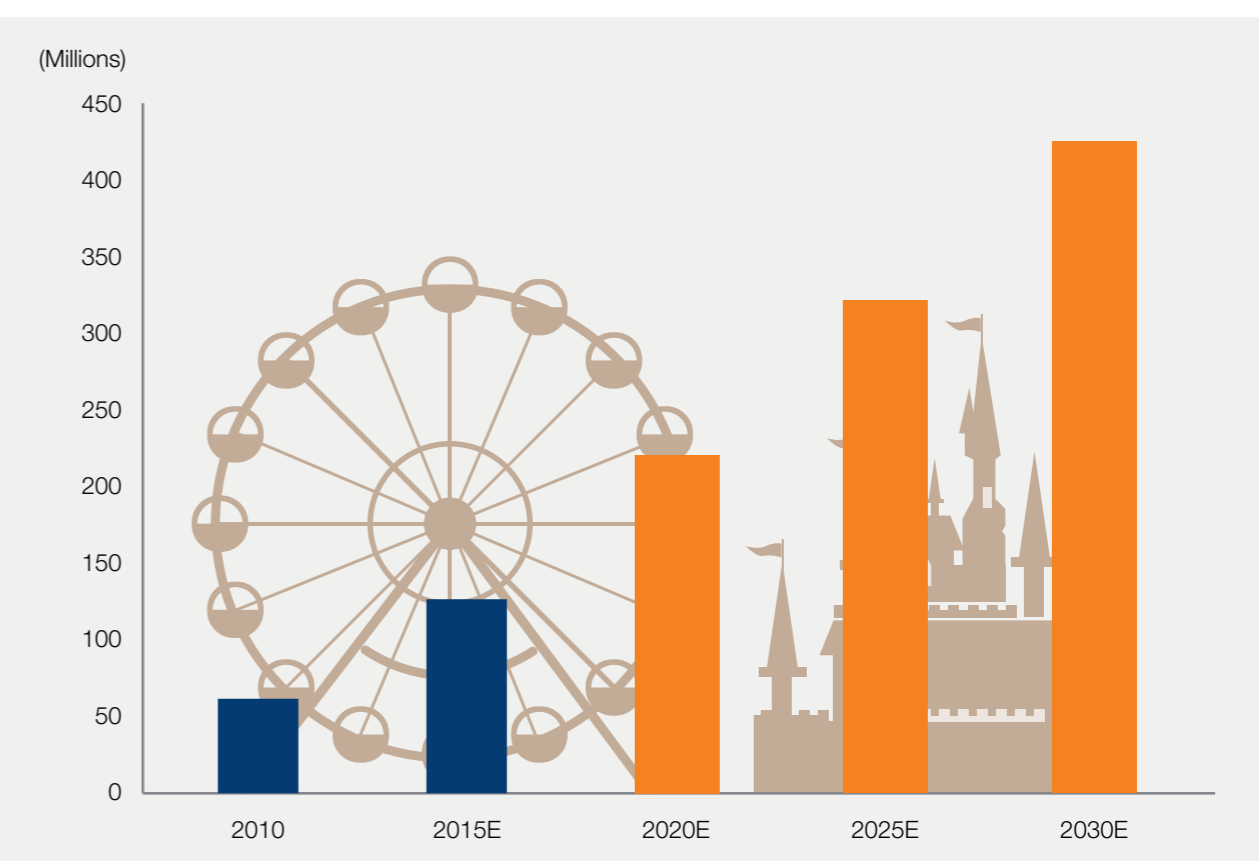
- As Asian consumers earn more, expenditure priorities will trace higher levels in their hierarchy toward well-being and having fun categories to match developed market peers as evidenced by wallets of India and China.
- Services and activities related to fun and leisure — such as but not limited to restaurants, alcohol, organic produce, tourism, theme parks, media, movie box office, and sports — collectively constituting “lifestyle” choices, are early in a multi-year secular expansionary shift.

Personal Expenditure by Category (2015)



Source: Euromonitor, CEIC, Goldman Sachs, Mirae Asset Global Investments (November 2016)

Projected Theme Park Attendance in China (2010-2030E)



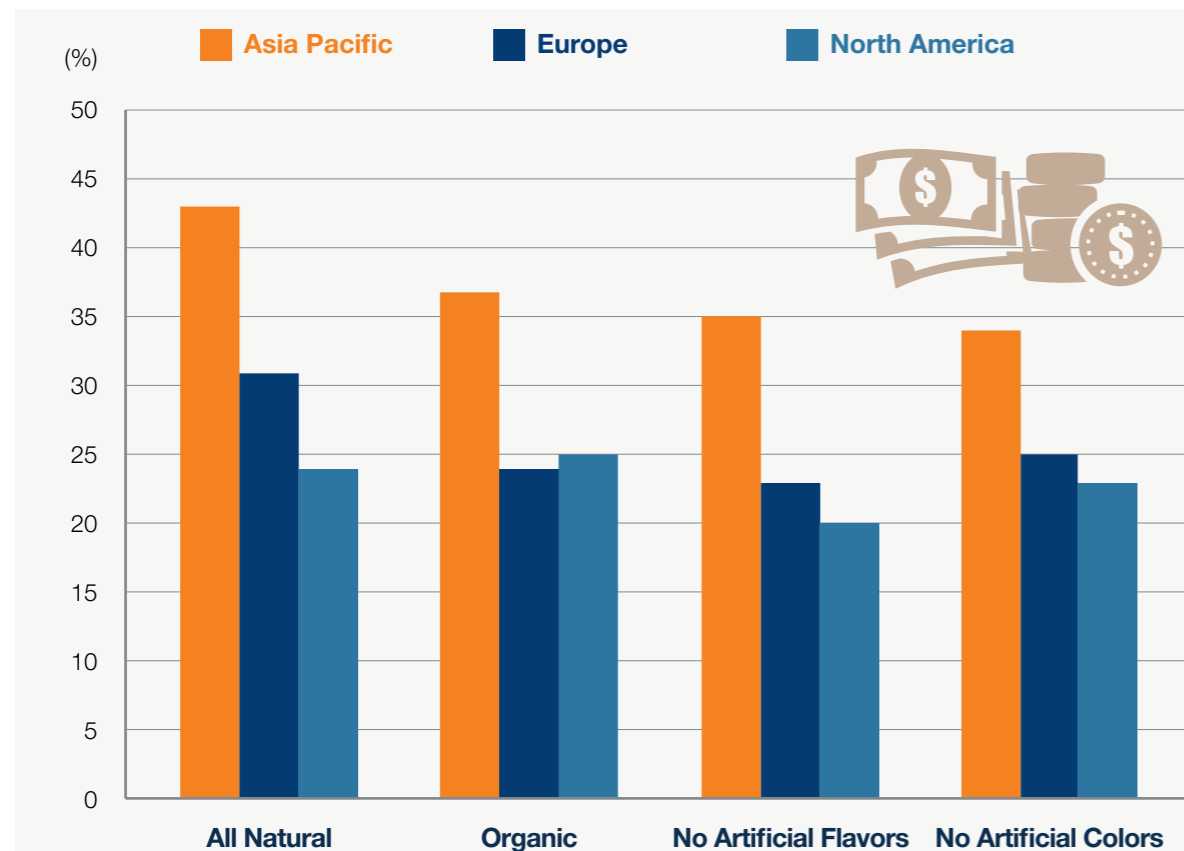
Source: AECOM, Citi Research, Mirae Asset Global Investments (2016)



Purity and Safety Concerns for Food and Medicine

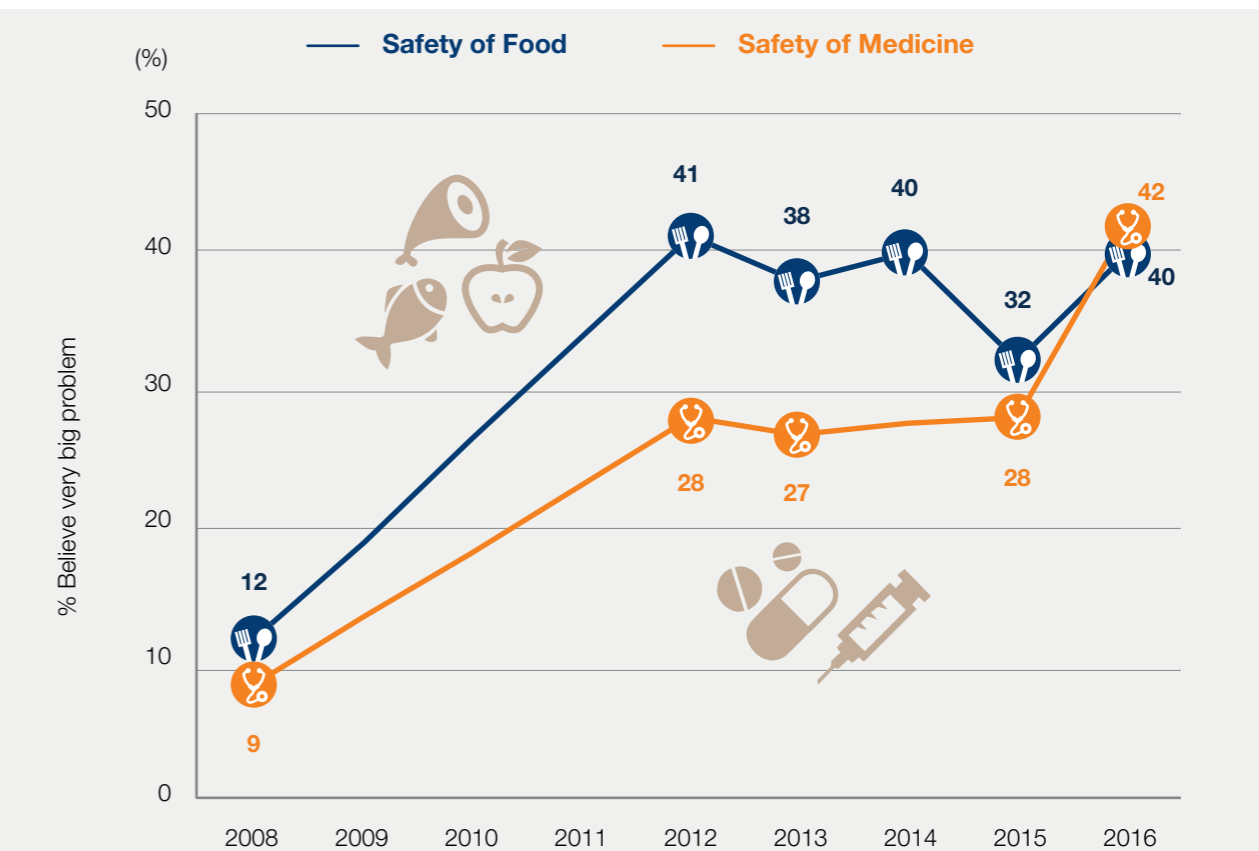
- More affluent Asians overtake Europeans and Americans in their spending intentions for sustainably sourced food as reflected in their willingness to pay a premium for all natural and organic ingredients.
- Public awareness of food and medicine dangers has acutely leaped among the Chinese middle class following high-profile scandals, prompting the government to seek stricter regulatory enforcement.

Percentage Very Willing to Pay for Each Attribute



Source: Nielsen, Healthy Eating Trends Around the World (2015)

Rising Chinese Concerns of Food & Medicine Safety



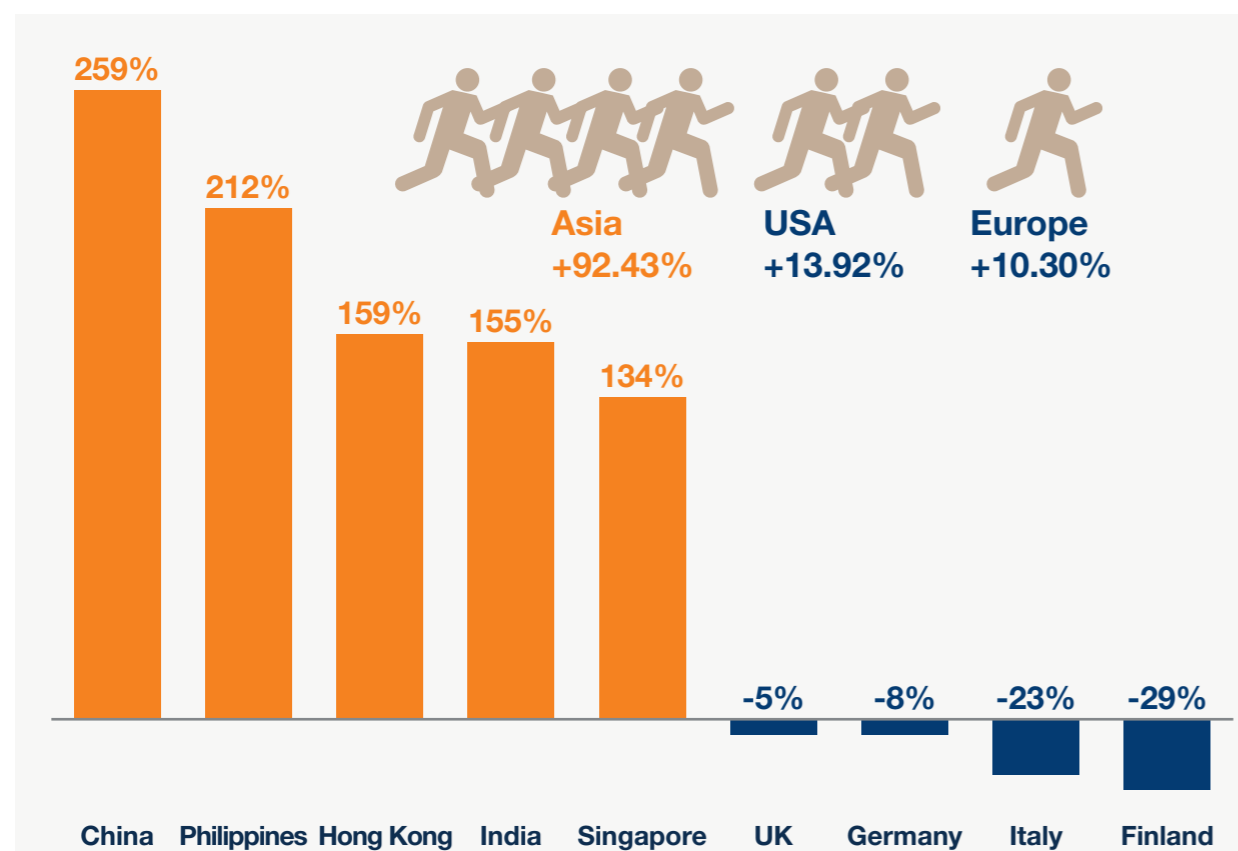
Source: Pew Research, Global Attitudes Survey, Mirae Asset Global Investments (2016)



Healthier Living with Sports

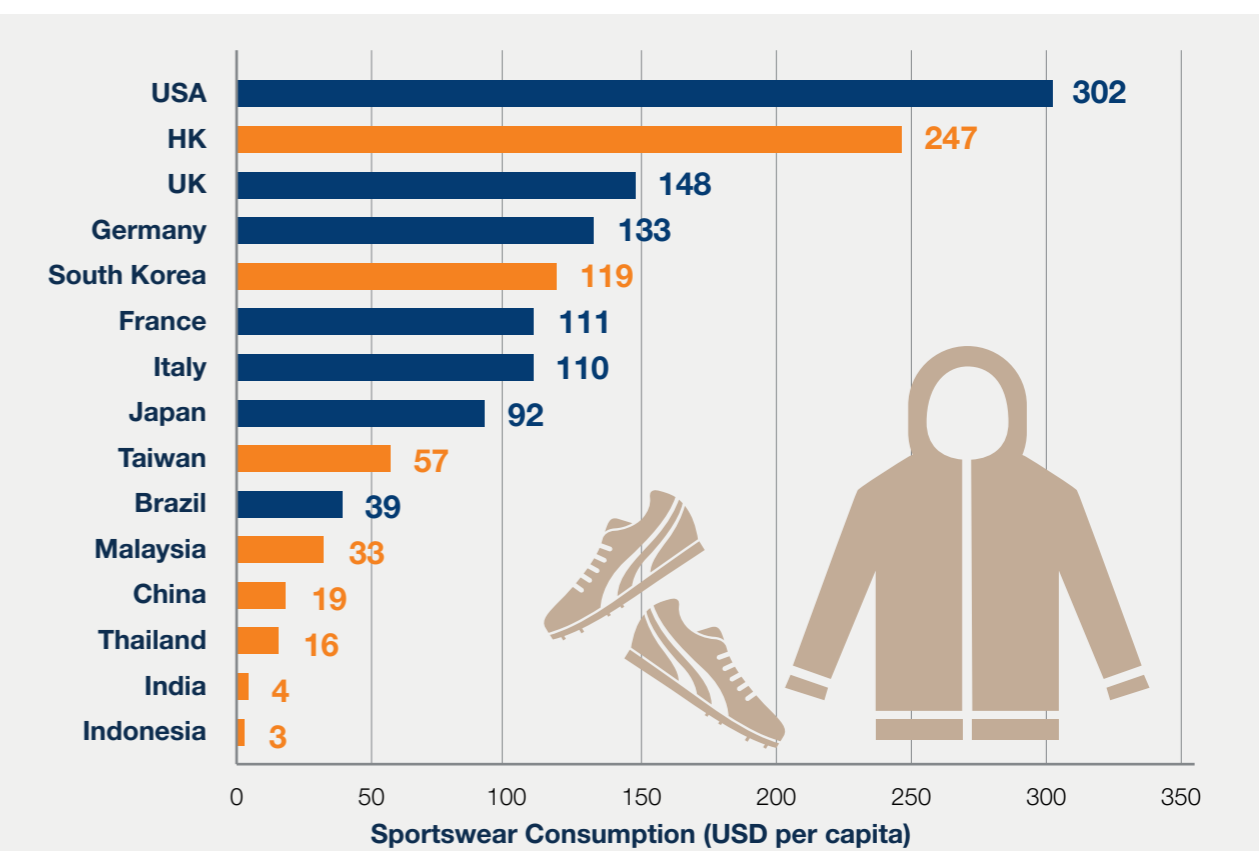
- In line with worries over health, Asians are participating in more sports, with a surge in marathon popularity.
- Regional per capita spend of sportswear remains at a fraction relative to Europe and the US, representing an exciting growth driver for the exercise-related segments in Asia.

Growth in Marathon Popularity (2009-2014)



Source: Copenhagen Business School, RunRepeat, Mirae Asset Global Investments (2016)

Per-Capita Consumption of Sportswear (2015)



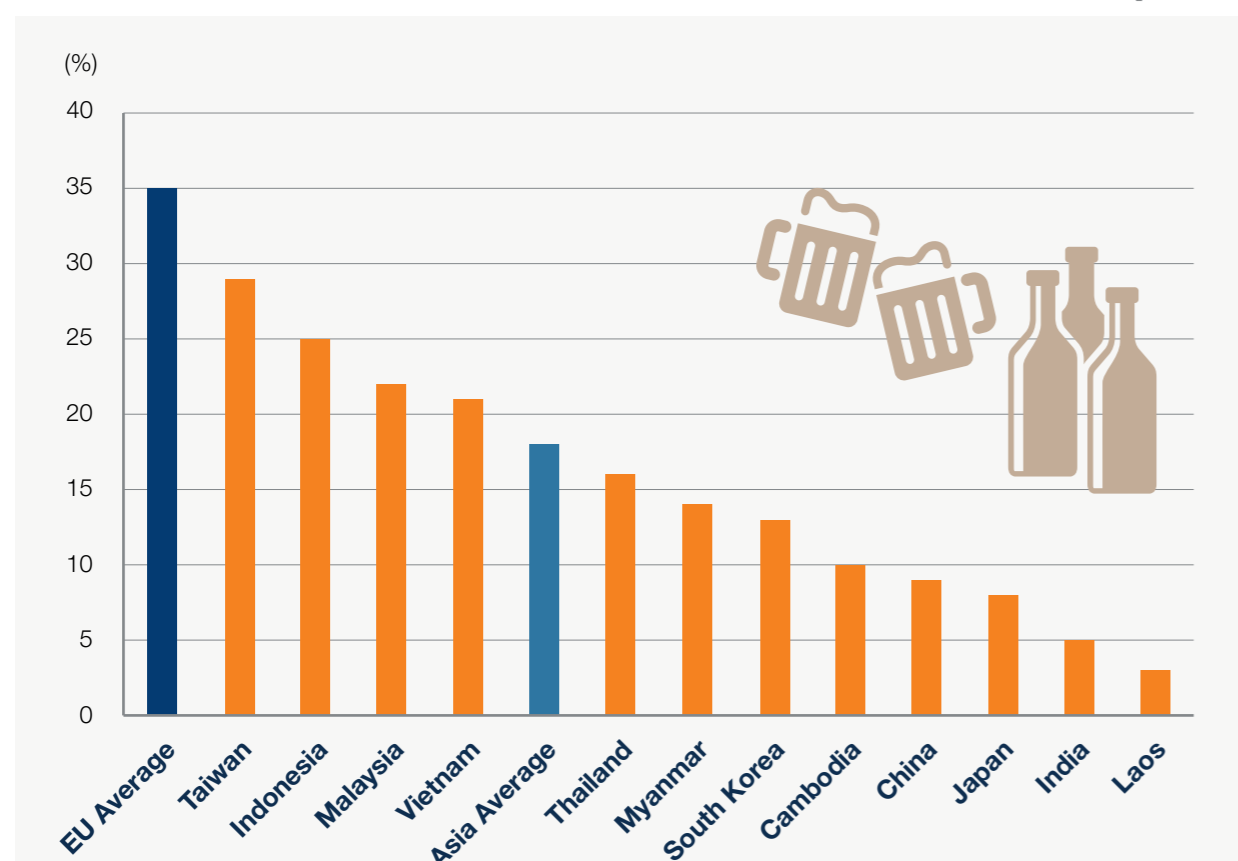
Source: CLSA, Euromonitor (2015)



Finer Ales and Films

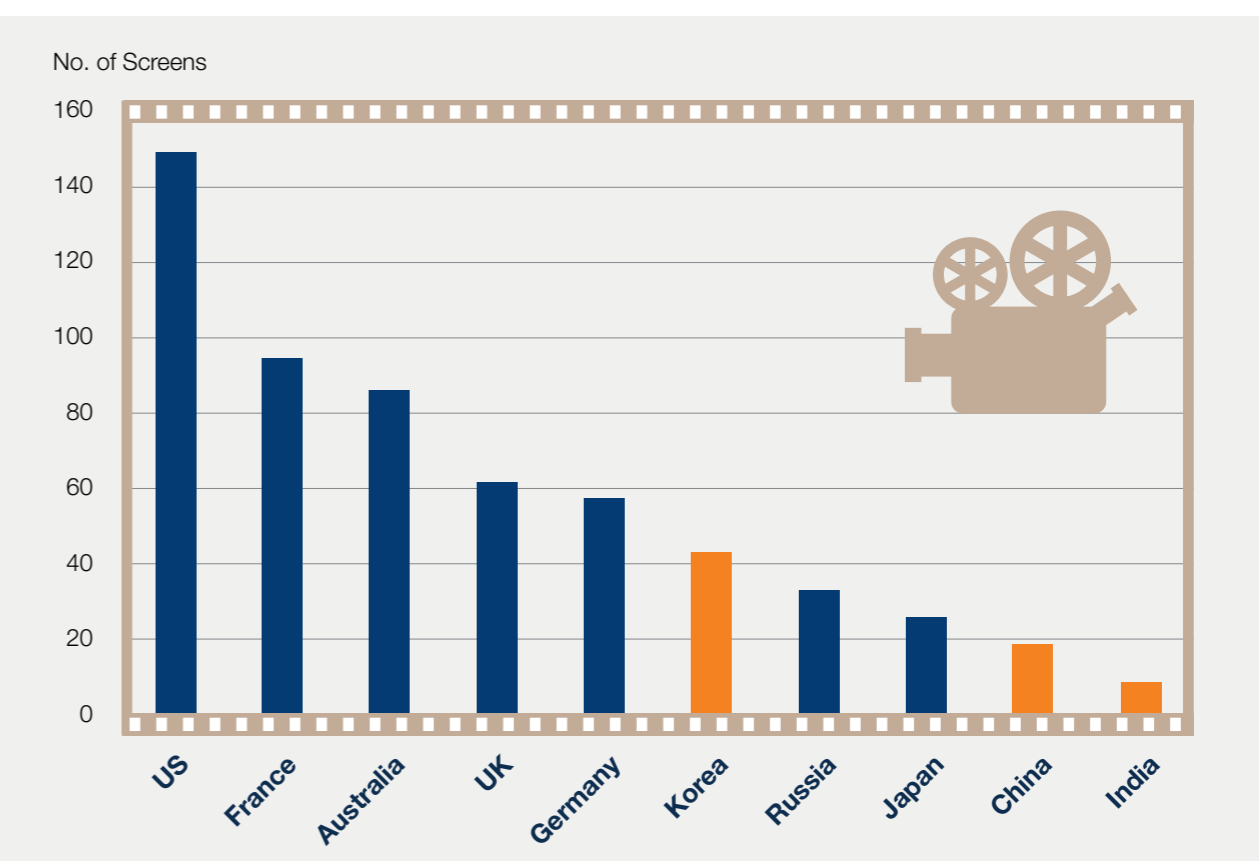
- While Asian beer volumes have slowed, with China accounting for two-thirds of total, urbanization and demand for premium beers are ascending concomitantly with newfound international beer offerings that afford global brewers upside margin opportunities.
- Movie screen penetration in Asia is far behind on the global spectrum, yet local appetite for entertainment and blooming domestic creative industries are translating into a higher number of quality movie productions.

Premium Beer Penetration for Asian Countries (2015)



Source: Canadean and Kepler Cheuvreux (2016)

Number of Screens per Million People (2014)



Source: Deutsche Bank, KOFIC, EntGroup, Mirae Asset Global Investments (2016)

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