ASEAN MILLENNIALS: One size fits all?
A GENERATION GAP IN ASEAN
Prologue

Millennials. Generation Y.
Whatever you choose to call them, the proposed birthdates are between the early 1980s and around 2000.

They are the generation that has in recent years been under the marketing spotlight. No other generation has received this much marketing attention. But have we got it right?

The mistake would be to view this demographic cohort as monolithic.

This study will show that there are differences among what we generally term as Millennials in ASEAN. Social, historical, cultural and environmental factors affect the behavioural tendencies of Millennials in the workplace, with technology and their worldview.

The following pages will give you clear snapshots of how diverse Millennials who are born in the 1980s and 1990s are from each other.

What is Hakuhodo Institute of Life and Living ASEAN?

A think tank dedicated to studying sei-katsu-sha

Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) was established in 2014 as the Hakuhodo Group’s think tank in the ASEAN region.

By studying the new lifestyles of sei-katsu-sha—our term for the holistic person—emerging in this region and sharing marketing ideas about them, we hope to help companies with their marketing efforts in ASEAN countries.

Hakuhodo’s sei-katsu-sha Insight philosophy

At Hakuhodo, we describe people not simply as “consumers” but as sei-katsu-sha—fully rounded individuals with their own lifestyles, aspirations, and dreams. “Consumer” is a producer-centric term that refers only to one facet of people’s lives. Human beings don’t exist solely to consume. They do much more than just shop. They are workers, residents, citizens, somebody’s son or daughter, and perhaps also a parent. At Hakuhodo, we use the term sei-katsu-sha to go beyond the consumer to understand the whole person and develop marketing approaches based on their true desires.
Why study ASEAN sei-katsu-sha?

The formation of the AEC (ASEAN Economic Community) has given further impetus to the flow of people and goods within the region and heightened interest in ASEAN as one big market.

ASEAN is a patchwork of countries that differ in language, religion, and cultural background. However, identifying commonalities among ASEAN sei-katsu-sha that transcend these differences makes it possible for us to gain a bird’s eye view of the entire ASEAN market.

Determining what ASEAN sei-katsu-sha have in common also serves as a useful yardstick for understanding how each country differs.

How does each generation see themselves? Taking a bird’s eye vs. a bug’s eye view

ASEAN Fixed Point Survey

<table>
<thead>
<tr>
<th>Method</th>
<th>In-home survey</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target population</td>
<td>Male and female sei-katsu-sha aged 15–59 in SEC categories A–D</td>
</tr>
<tr>
<td>Areas covered</td>
<td>Singapore, Kuala Lumpur (Malaysia), Bangkok and Nakhon Ratchasima (Thailand), Jakarta and Surabaya (Indonesia), Hanoi and Ho Chi Minh City (Vietnam), Yangon (Myanmar), Manila (Philippines)</td>
</tr>
<tr>
<td>Sample size</td>
<td>8,100 samples (900 in each country)</td>
</tr>
<tr>
<td>Allocation</td>
<td>In line with the demographic structure in each country</td>
</tr>
<tr>
<td>Conducted by</td>
<td>Tokyo Survey Research</td>
</tr>
<tr>
<td>Date</td>
<td>December 2015 to January 2016</td>
</tr>
</tbody>
</table>

In-home interviews on the generation gap

| Target population | Sei-katsu-sha in SEC categories A–C |
| Areas covered | Singapore, Kuala Lumpur (Malaysia), Bangkok (Thailand), Jakarta (Indonesia), Ho Chi Minh City (Vietnam), Manila (Philippines) |
| Families visited | 37 total |
| Conducted by | Tokyo Survey Research |
| Date | August 2016 |

ASEAN Millennials in the spotlight

- The word “millennial” refers to the fact that these sei-katsu-sha began to come of age around the year 2000
- Generally born in the 1980s and 1990s, Millennials overlap with Generation Y
- In terms of age, they are those currently between about 17 and 36 years old
- "Millennial" has become a global buzzword for "young people today"

- Millennials are very different from the previous generations, particularly in terms of their fresh values and high degree of fluency in digital technology
- Millennials are notoriously difficult to reach with traditional marketing approaches
- Social media is often cited to have a major influence on them

- Millennials are particularly important in ASEAN countries, whose populations have a high percentage of young people

Who are the Millennials?

Why have they captured the world’s attention?

This generation makes up a third of the population in ASEAN

ASEAN sei-katsu-sha born in the 1980s and 1990s—are they same generation?

At HILL ASEAN, we divide Millennials into those born in the 1980s and those born in the 1990s, analyzing them while using those born in the 1970s as a benchmark to identify the relative differences among the generations.

Does lumping people aged 17 to 36 together in one generation in ASEAN, which has had so many developing countries undergo dramatic socio-economic shifts in the recent years, not present any problems?

Different historical events impacted those born in the 1970s, 1980s, and 1990s.

- Past difficulties greatly impacted those born in the 1970s.
- Those born in the 1980s have been affected by both the difficulties of the past and hopes for the future.
- In contrast, those born in the 1990s have primarily been affected by current events and those that indicate future promise.

Survey procedure

Show subjects a historical timeline of events in their country

Have them point out the ones that have impacted their own thoughts and behaviors

Survey insights

Different historical events impacted those born in the 1970s, 1980s, and 1990s.
How does historical context shape the values of a generation?

**1970s:** Heavily impacted by past difficulties

**1980s:** Straddle past difficulties and future promise

**1990s:** Influenced by a promising future

---

### 1970s
- **1970: Age 8** - Parent was overseas looking for work (Philippines 1962)
- **1973: Age 11** - First nationwide private TV launched (Japan 1955)

### 1980s
- **1980: Age 20** - First commercial television broadcast in Vietnam (1972)
- **1985: Age 25** - Bought the first-generation Honda Super Dream, still uses it (Vietnam 1973)

### 1990s
- **1990: Age 15** - Parents were often working far from home (Philippines 1976)
- **1995: Age 18** - Got first smartphone in high school (Thailand 1993)

---

### Multinational
- **1970s**
  - Subsidy period (1976-1986)
  - First nationwide private TV launched (Japan 1955)

### Singapore
- **1970s**
  - First nationwide private TV launched (Japan 1955)

### Malaysia
- **1970s**
  - First independent cinema (1957)

### Thailand
- **1970s**
  - First nationwide private TV launched (Japan 1955)

### Indonesia
- **1970s**
  - First nationwide private TV launched (Japan 1955)

### Vietnam
- **1970s**
  - First nationwide private TV launched (Japan 1955)

---

### Difficult past

have memories of the hardships of the past, but also affected by the digital revolution that occurred once they came of age

---

### Promising future

influenced by technology’s widespread and critical presence in their lives as well as future events that have shaped their future potential
How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN live and work differently?

**Impact of difficult experiences from economic crisis and political upheaval**

Want safety, stability, and peace of mind

Want to use different facets of themselves in their professional and personal lives

Want to limit risks with side businesses (diversity risks and expand opportunities)

Want to flexibly minimize risks and maximize opportunities

Want to grow while doing what they like, making no distinction between their professional and personal lives

Want to simply go all in, doing what they like immediately

**Want safety, stability, and peace of mind**

- Having experienced economic crisis and political upheaval, they make safe, reassuring choices
- Want the security of a steady career (guarantees over risk)
- Impacted by both a difficult past and a promising future
- Impacted by expanded possibilities from digitalization and globalization
- Past failures make them avoid risk, so they set their sights on steady achievement in their field
- Parents’ company fell apart during the economic crisis, so opted for a university job with a steady income. (Bangkok)
- Life was tough after the war. Focuses more on saving than spending, because it’s important to always be prepared. (Vietnam)
- Plays with his band every Saturday as a hobby, and also sells motorcycle parts and shoes. (Jakarta)

**Want to use different facets of themselves in their professional and personal lives**

- Individuals from the 1980s and 1990s have experienced economic crisis and political upheaval, so they use multiple facets of their personalities to create more meaning in their professional and personal lives within an unpredictable world
- The 1970s generation often uses a variety of skills and interests in their professional and personal lives
- Want to use different facets of themselves in their professional and personal lives
- Has a separate home in the city, because he feels it’s important to separate personal time and family time. (Bangkok)
- Opened a shop as an extension of her hobbies, and can run it while she raises her kids. (Jakarta)
- Plays with his band every Saturday as a hobby, and also sells motorcycle parts and shoes. (Jakarta)

**Want to limit risks with side businesses (diversity risks and expand opportunities)**

- Experienced uncertainty in the past, so they use side businesses as insurance against losing everything while waiting for opportunity to strike
- Experienced losing his job in the airport chaos, so started farming as a side business. (Bangkok)
- Parents know what the future will bring, so he bought a car and started working as an Uber driver on the side. (Java)

**Want to flexibly minimize risks and maximize opportunities**

- Want secure progress
- Experienced hardships in the past, so they have a powerful tendency to choose the secure path and strongly desire safe, reliable upward progress
- Wants to serve out her time at the company that has treated her well since times were tough economically. (Java)
- Experienced losing his job in the airport chaos, so started farming as a side business. (Bangkok)

**1970s**

- **Life was tough after the war.** Focuses more on saving than spending, because it’s important to always be prepared. (Vietnam)
- **Focus on steady career (guarantees over risk)**
- Past failures make them avoid risk, so they set their sights on steady achievement in their field
- Parents’ company fell apart during the economic crisis, so opted for a university job with a steady income. (Bangkok)
- **Want to use different facets of themselves in their professional and personal lives**
- Impacted by both a difficult past and a promising future
- Impacted by expanded possibilities from digitalization and globalization
- Past failures make them avoid risk, so they set their sights on steady achievement in their field
- Parents’ company fell apart during the economic crisis, so opted for a university job with a steady income. (Bangkok)

**1980s**

- **Want to use different facets of themselves in their professional and personal lives**
- Indirectly experienced economic crisis and political upheaval, as they use multiple facets of their personalities to create more meaning in their professional and personal lives within an unpredictable world
- Want to use different facets of themselves in their professional and personal lives
- Has a separate home in the city, because he feels it’s important to separate personal time and family time. (Bangkok)
- Opened a shop as an extension of her hobbies, and can run it while she raises her kids. (Jakarta)
- Plays with his band every Saturday as a hobby, and also sells motorcycle parts and shoes. (Jakarta)

**1990s**

- **Want to grow while doing what they like, making no distinction between their professional and personal lives**
- Don’t live by other people’s rules. Want to express themselves while making a living by doing what they want, learning, and growing at the same time
- **Just want to get started (opportunities over risk)**
- With limitless opportunities opening up before them, they see doing nothing as the biggest risk of all
- Quit a company job after a month and opened a shaved ice stand like she wanted. (Bangkok)
- Making sweets and fashion are her hobbies, so she started businesses doing both on Instagram. (Kuala Lumpur)

**Life principles**

- **Perspectives on work and career**
- 1970s
- 1980s
- 1990s
- as well as from extensive support from their parents' generation
- 1970s, 1980s, 1990s
- 1970s
- 1980s
- 1990s
- from extensive support from their parents' generation

**Want to simply do what they like immediately**

- For the most part, this group has not experienced hard times, and has instead grown up in a world of expanding opportunity thanks to economic growth in Asia, globalization, and the digital revolution. They view taking on a challenge as a lost opportunity, so they have a strong desire to start doing what they like right away. As a result, they make no distinctions between their professional and personal lives.
How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN interact with technology differently?

1970s

Digital technology is a tool to support real life

Reliably preserving memories of interpersonal relationships

1) Took a picture with clients at work to remember the moment. (Manila)
2) Photos with a group of old friends. (Bangkok)
3) Checks on where she is with the family and contacts friends. (Mumbai, Nepal)

Value privacy, so communicate anonymously with people they don’t know

1) Manages three accounts, each for different content. (Ho Chi Minh City)
2) Uses an account with a different name to upload interesting photos. (Bangkok)

Want to have strong relationships

This group wants to reliably preserve memories with precious friends and family, and be able to reliably contact them at any time—and digital tools help them do that. At the same time, they have a strong desire to protect their privacy and have anonymous accounts that they use to interact with people they don’t know online.

Want to be acknowledged

This group is always polishing their most flattering images and has a strong desire to get likes on social media. They therefore consider their persona on social media as something to be carefully curated and edited, posting photos that only show their best side.

1980s

The internet is a “stage” for creating their persona

Post carefully curated and well-considered photos that only show them at their best

1) Posted a photo of the cookies that came out best. (Singapore)
2) Posted a photo of the fried chicken photo where they looked the best. (Jakarta)
3) Posted a casual photo with perfectly applied makeup. (Manila)
4) Posted a sports car as a want. (Bangkok)

How others see them is important

1) Tags the friends in photos to get more likes. (Manila)
2) Wows with photos of her kid. (Singapore)
3) Posts carefully curated and well-considered photos that only show them at their best. (Bangkok)

1990s

The virtual world is just another part of real life

The internet has been around since they were students and is a natural part of life, so they don’t see the virtual and real worlds as separate things.

Want to share their true selves, warts and all

1) Takes selfies even during the interview. (Jakarta)
2) Has already shared a shot of the interview. (Singapore)

Digital present in everyday life

1) Became a YouTuber to share time with his friends. (Jakarta)
2) Took selfies even during the interview. (Jakarta)
3) Told his friends to find out what he bought him for his birthday. (Tesla)

ALWAYS LEARNING

1) Downloaded an app to learn Chinese. Will go to Chinese school if his desire to learn tops 80%. (Vietnam)
2) Downloaded an app to learn how to take pictures from the world’s most popular photographer on YouTube. (Singapore)
3) Posted a saying that only specific people would understand. (Bangkok)

AND

1) Learning how to take pictures from the world’s most popular photographer on YouTube. (Singapore)
2) Did his own research and made his own research report. (Bangkok)
3) Has a photo of the interview with his friends. (Jakarta)

Why Instagram?

1) Making a weird face. (Singapore)
2) Told his friends to find out what he bought him for his birthday. (Tesla)
3) Tweeted his girlfriend after he forgot their anniversary. (Manila)

Why Snapchat?

1) Makeup-free. (Manila)
2) Posted a photo that expressed her sadness about breaking up. (Vietnam)
3) Posted a saying that only specific people would understand. (Bangkok)

Digital perspective: How and why they use social media/smartphones

AND

AND

AND

Digital present in everyday life

1) Became a YouTuber to share time with his friends. (Jakarta)
2) Took selfies even during the interview. (Jakarta)
3) Has already shared a shot of the interview. (Singapore)
How have historical events made the 1970s-, 1980s-, and 1990s-born generations in ASEAN shop differently?

**1970s**
- **Mistake-averse shopping**
  - They buy personal items that make sense for them in terms of value and status, so they treat them with care and use them for a long time.
  - Linear purchasing process; value pre-purchase info
  - They don’t want to make a mistake, so they make sure to gather information and seek recommendations and experiences from people they trust before finally making a decision to actually buy.
  - May be a brand he’s loved forever from a friend’s shop.
  - (Ho Chi Minh City)
  - Found a wallet in the same shape she’s always liked at the store and bought it.
  - (Bangkok)
  - They don’t want to make a mistake, so they make sure to gather information and seek recommendations and experiences from people they trust before finally making a decision to actually buy.
  - A new pair of the same brand marathon shoes (Bangkok)
  - Motorcycle treasured for over 20 years (Ho Chi Minh City)
  - Smartphone treasured for over five years (Manila)
  - Brand handbag she’s loved forever (Singapore)
  - A new pair of the same brand marathon shoes (Bangkok)
  - Motorcycle treasured for over 20 years (Ho Chi Minh City)
  - Smartphone treasured for over five years (Manila)
  - Brand handbag she’s loved forever (Singapore)

**1980s**
- **Persona-creating shopping**
  - They make buying decisions based on how the items contribute to creating their personal image.
  - Because there is little purchase risk, they make buying decisions instantly.
  - They purchase things that will support them or result in new experiences to share with friends and family.
  - Bought a drone because would make his own tech fancy (Singapore)
  - Get wearable technology to show she gets her exercise (Singapore)
  - Trendy watch (Bangkok)
  - Watch and sunglasses for bicycle commute (Manila)
  - Boots to suit his motorcyclist rock-and-roll lifestyle (Jakarta)

**1990s**
- **Shareable-experience shopping**
  - Because there is little purchase risk, they make buying decisions instantly.
  - They purchase things that will support them or result in new experiences to share with friends and family.
  - Can sell something right away if doesn’t like it.
  - (Bangkok)
  - Posts reviews after buying something and recommends it to friends.
  - (Jakarta)
  - Favorites a brand after buying something, then actively seeks out more information.
  - (Singapore)
  - Decided to get the credit card because it would give him discounts on brands he likes.
  - (Kuala Lumpur)
  - Bought a device to edit videos for his YouTube channel.
  - (Jakarta)

**Attention towards shopping**

**Outgoing journey**

**Customer journey**

**Comparison**

**Want to avoid mistakes**
- Since they want to buy things they’ll use for a long time, this group has a strong desire to avoid making the wrong purchase. They therefore frequently decide on a brand before they make comparisons, prioritizing opinions from people they trust and their own experiences as prior information.

**Linear purchasing process; value pre-purchase info**
- Make full use of both and online and offline channels to make a thorough comparison of the items that suit them and get them as cheaply as possible.

**Mistake-averse shopping**
- Since they want to buy things they’ll use for a long time, this group has a strong desire to avoid making the wrong purchase. They therefore frequently decide on a brand before they make comparisons, prioritizing opinions from people they trust and their own experiences as prior information.

**Persona-creating shopping**
- They make buying decisions based on how the items contribute to creating their personal image.
- Because there is little purchase risk, they make buying decisions instantly.
- They purchase things that will support them or result in new experiences to share with friends and family.

**Cyclical purchasing process; value post-purchase**
- They compare products in the same way as the 1980s group, but keep collecting information on brands they like after purchase and review them for their friends.

**Want to get/put out authentic reviews**
- This group has a strong tendency to spend money on experiences they can share. Because reviews are an important part of the experience, they have a strong desire to get unbiased recommendations and share online reviews with the people around them. So they tend to actively write reviews themselves, and continue to collect information on things they buy if they like them. If they don’t, they are very likely to resell it.
Overall assessment of the gaps between the 1970s-, 1980s-, and 1990s-born generations in ASEAN
Want to live a safe, stable life and build richer personal relationships, so they select a reliable path unlikely to fail and steadily cultivate and develop their lives.

Want to be accepted for all facets of themselves, so they present different personas to match different situations and select information to flexibly minimize risk and maximize opportunity.

Want to make their ideals a reality in an expanding world, so they simply work at doing what they love and share their authentic moments and feelings with family and friends, equally sharing their experiences and honest evaluations in both the virtual and real worlds.

Overall assessment of the gaps between the 1970s-, 1980s-, and 1990-born generations

1970s
Want secure progress
Want richer human relationships
Want to avoid mistakes

Impact of difficult experiences from economic crisis and political upheaval

1980s
Want to use multiple facets of themselves to flexibly minimize risk and maximize opportunity
Want to be acknowledged
Want to select the best items in the best way

Impacted by both a difficult past and a promising future

1990s
Simply want to work at what they like immediately
Want to share authentic self
Want to get/give authentic reviews

Impacted by expanded possibilities from digitalization and globalization

Cultivator 1970s
Want to live a safe, stable life and build richer personal relationships, so they select a reliable path unlikely to fail and steadily cultivate and develop their lives.

Curator 1980s
Want to be accepted for all facets of themselves, so they present different personas to match different situations and select information to flexibly minimize risk and maximize opportunity.

Convergenator 1990s
Want to make their ideals a reality in an expanding world, so they simply work at doing what they love and share their authentic moments and feelings with family and friends, equally sharing their experiences and honest evaluations in both the virtual and real worlds.
Marketing implications
How to engage with the 1980s- and 1990s-born generations in ASEAN
What brand personalities are needed to engage with the 1980s- and 1990s-born generations

**Curator 1980s**

Want to be accepted for all facets of themselves, so they present different personas to match different situations and select information to flexibly minimize risk and maximize opportunity.

Producer that enables them to present their best selves in the best light

Stimulates them to get closer to the selves they want to project

**Convergenator 1990s**

Want to make their ideals a reality in an expanding world, so they simply work at doing what they love and share their authentic moments and feelings with family and friends, equally sharing their experiences and honest evaluations in both the virtual and real worlds.

Always by their side, complementing their feelings and situation, allowing them to just be themselves

Allows them to show themselves as they really are, warts and all

Sei-katsu-sha born in the 1980s and 1990s cannot easily be lumped together as a single “Millennials” generation

What approaches are best for each generation?
Time in the spotlight
Present items, experiences, opportunities, and places that immediately make them want to share and that will get them likes on social media
Example: At events, provide stages where anyone can be the main character

Character-based approach
Provide structures and options that allow them to make the choices that help them become their ideal persona
Example: Online shopping site that analyzes ideal personas and suggests products based on the results

Make themselves exceptional
The 1980s-born group wants to be acknowledged, so offer special status or praise that satisfies their need to be recognized
Example: Issue certificates to loyal users or invite them to events

Anytime, any place
Offer situations and systems that allow this group to engage in interactive communication whenever they want and wherever they are
Example: Real-time responses on social media

Mood-based approach
Adjust real-time communication to complement this group’s mood in the moment
Examples: Analyze the mood of social media posts for retargeting

Express their true selves
Offer products and services that support this group in maximizing authentic self-expression
Examples: Help them take on ridiculous challenges and engage in activities that older generations won’t understand

Make the 1980s group shine
Communicate like a stage producer

Be a companion to the 1990s group
Communicate like an honest buddy
Recently, there was a quote that said, "Because all the people of the world are part of one electronically based, intercommunicating network, young people everywhere share a kind of experience that none of their elders ever had..."

While this sentiment may express a worldwide phenomenon, we have found through this study of ASEAN Millennials that the way each decade has embraced the digital space varies.

It is far too simplistic to say that people born in the 1990s, 1980s and 1970s view their life with technology with the same cyber glasses.

In a nutshell:
Those born in the 1990s are comfortable sharing their lives online. They make little differentiation between the digital and real worlds. The two have become one. They are comfortable with real life lived on the Internet.

Those born in the 1980s, on the other hand, are good at self-promotion and fostering connections through social media. They tend to limit their online sharing in order to craft their own desired public image, emphasizing good qualities and exciting parts of their lives.

The 1970s-born are on the cusp. They didn’t exactly grow up in the digital age. They have less of an addiction to mobile devices. The old values of rising in the world through hard work still form the bedrock of their conviction.

What is the take-away?
Marketers and communicators need to be more vigilant in defining the Millennials they want to reach. As we have found, one size doesn’t fit all. A broad stroke “digital campaign” will not cut it.

Survey work, research and presentation
Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN)
Goro Hikari
Yusuke Miyabe
Chontara Yuktanun (Thailand)
Ampa Theerapatsakul (Thailand)
Warapoom Benjapong (Thailand)
Phurit Chantavanich (Thailand)
Farhana E. Devi Attamimi (Indonesia)
Rian Prabana (Indonesia)
April Tan (Singapore)
Bee Lee (Malaysia)
Ann Liew Leng Hui (Malaysia)
Daniel Lim Kuo Min (Malaysia)
Tran Thi Hong Lien (Vietnam)
Hakuhodo Institute of Life and Living (Tokyo)
Tatsuki Shimamoto
Shuza Ishidara
Akemi Natsuyama
Takamasa Sakai

Event/Design
PRODUCTS (BANGKOK) Co., Ltd.
Izumi Yokoyama
Elisuke Narukawa
Prompphon Supataravanich
Musubi Co., Ltd.
Masahumi Mizutani

Research
Tokyo Survey Research & Co., Ltd.

Overall supervision
Hakuhodo Asia Pacific Co., Ltd.
Masato Saito