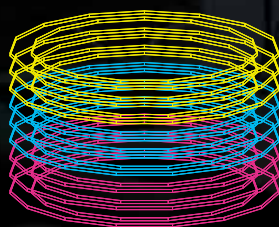# THINK FUTURE FORWARD

HOW ASEAN LIVES EVOLVE AS TECHNOLOGY GETS SMARTER

ASEAN SEI-KATSU-SHA FORUM 2019

Prologue

The spread of smartphones and social media in ASEAN countries over the last decade has been nothing short of remarkable. It is no exaggeration to say that social media is now the main source of information for ASEAN *sei-katsu-sha*—our term for the holistic person.
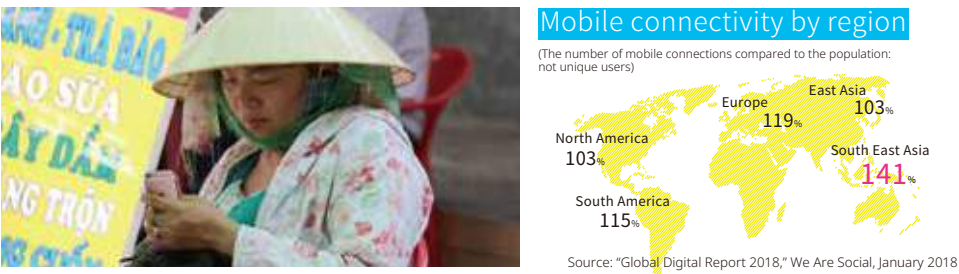
However, looking forward to the next ten years, technologies that could be the "next smartphone" have in recent years been showing signs of spreading one after another in Japan, China, the US and elsewhere. The Internet of things (IoT), artificial intelligence (AI), connected cars, smart speakers and other new technologies are beginning to change the behavior of *sei-katsu-sha* around the world.

So what changes will occur when ASEAN *sei-katsu-sha* encounter technologies like these? And how will their interactions with companies and brands change?

This time, we discuss behavioral changes and changes in interactions with brands that will result from new technologies, drawing on independent research, including case studies of extreme users in ASEAN. We also explain what companies and brands should do to respond quickly to these changes.
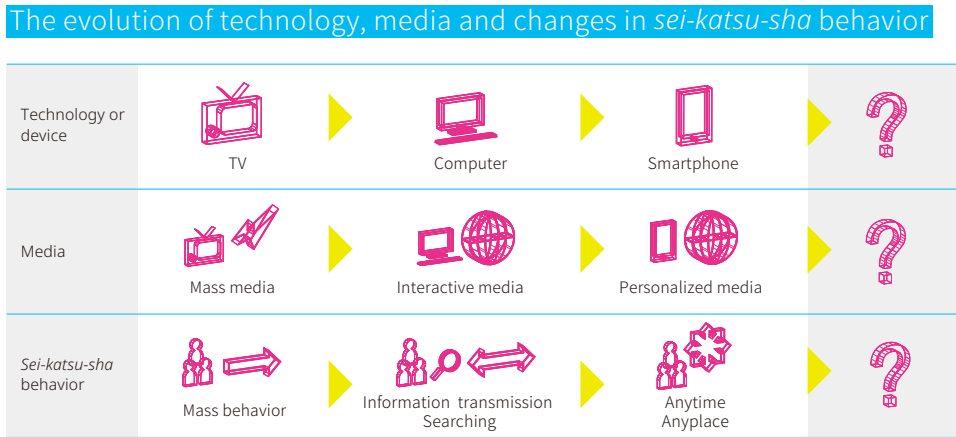
What's next after the smartphone?

The lives of ASEAN *sei-katsu-sha* have been completely changed by smartphones.

Mobile connectivity by region
(The number of mobile connections compared to the population: not unique users)

- East Asia 103%
- Europe 119%
- North America 103%
- South East Asia 141%
- South America 115%

Source: "Global Digital Report 2018," We Are Social, January 2018

The adoption of the smartphone in the last decade has dramatically changed the lives of ASEAN *sei-katsu-sha*.
Today, ASEAN is one of the world's most mobile connected regions. The per capita penetration of mobile phones here tops even that of the developed regions of the world. This photo was taken in Ho Chi Minh City, Vietnam in the of summer 2015. A woman working at a food stand holding the latest smartphone shows the degree to which the smartphone had spread at the time, but it is hardly remarkable now.

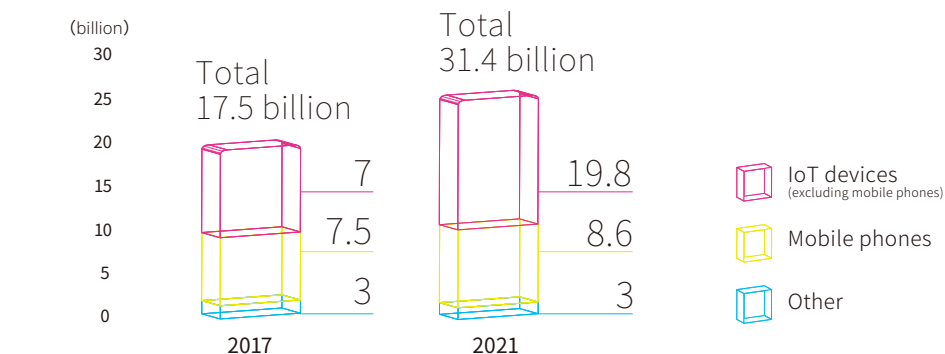## What will change ASEAN *sei-katsu-sha* next after the smartphone?

Our question is: looking forward to the next 10 years, what technologies will change ASEAN *sei-katsu-sha*'s lives and how?

The evolution of technology, media and changes in *sei-katsu-sha* behavior

Technology or device	TV	Computer	Smartphone	?
Media	Mass media	Interactive media	Personalized media	?
Sei-katsu-sha behavior	Mass behavior	Information transmission Searching	Anytime Anyplace	?

Global trend in technology and devices

Connected (IoT) devices to surpass mobile phones in 2018

Number of connected devices (worldwide)

(billion)

30
25
20
15
10
5
0

Total
17.5 billion

7
7.5
3

2017

Total
31.4 billion

19.8
8.6
3

2021

- IoT devices (excluding mobile phones)
- Mobile phones
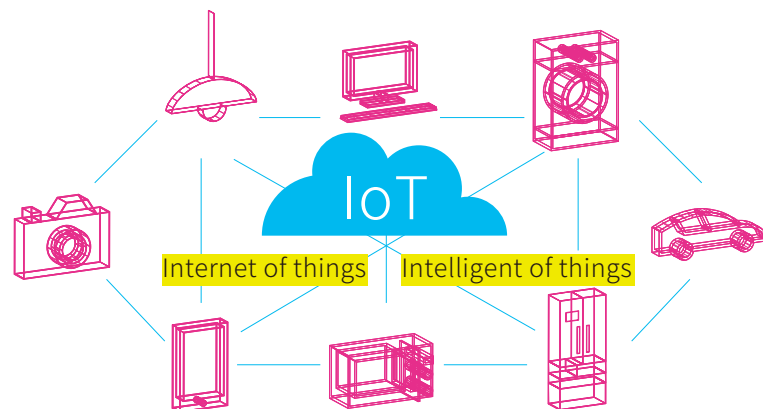- Other

Remark: IoT devices includes short-range IoT (such as Wi-Fi, Bluetooth), and wide-area IoT devices (such as devices using cellular connections)
Mobile phone includes smartphones and non-smartphones
Other includes computer, laptops, tablets and fixed phones
Sources: Ericsson Mobility Report, June 2018

IoT: Driving the global technology trend

IoT is the network of physical devices, vehicles, home appliances, and other items embedded with electronics, software, sensors, actuators, and connectivity that enables these things to connect, collect and exchange data remotely. Moreover, with the evolution of AI, IoT is able to acquire intelligence. The fast-paced growth in this area is driven by fierce competition among the world's IT tech giants.

IoT

Internet of things   Intelligent of things

New kinds of media and other changes the IoT will bring

1 The "Beyond the screen" age

With the adoption of IoT, digitalization that has been advancing on our smartphone, computer and display screens will spread beyond the screen to our home appliances, cars, communities and social infrastructure.

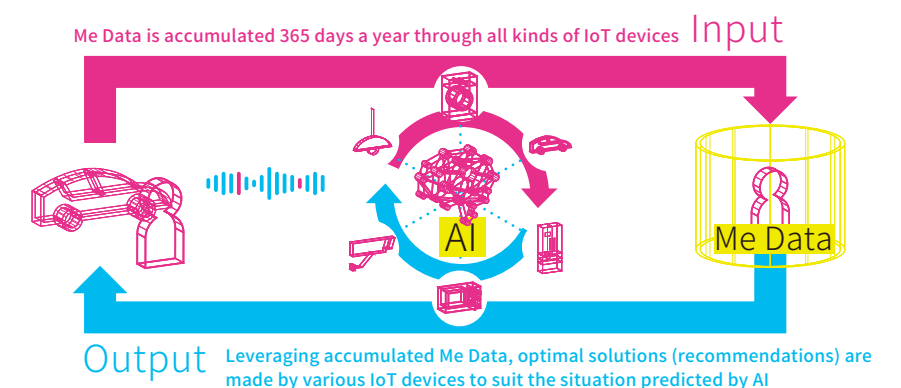## 2 Accumulation of "Me Data"

We have reached an age where various IoT devices can collect information about us—behavior history, purchase history, preferences and moods. This "Me Data" will be accumulated and managed centrally with one ID.

3 Optimization of "Recommendations"

The more AI learns our Me Data, the more it will be able to predict our behavior and be able to provide what we need when we need it through various IoT devices.

IoT = Assistive Media

Not just right-time, right-place communication, but provision of solutions, too

Me Data is accumulated 365 days a year through all kinds of IoT devices   Input

AI   Me Data

Output   Leveraging accumulated Me Data, optimal solutions (recommendations) are made by various IoT devices to suit the situation predicted by AI

"Assistive Media." This is the name we'd like to give the means for providing not just right-time, right-place communication, but also solutions, which the adoption of the IoT will make possible. We are entering the Assistive age, where we'll get what we need from information and solutions optimized by Me Data and AI. The media and our lifestyles are set to become more Assistive.

How will ASEAN lifestyles be changed by Assistive Media?

Hakuhodo Institute of Life and Living ASEAN's Study of the IoT in Six ASEAN Countries: Research Outline

| Qualitative study		Quantitative survey
Home-visit study	Survey method	Internet survey
Men and women aged 20–49 (SEC classes A–C)	Subjects	Men and women aged 20–49 (SEC classes A–C)
Bangkok (Thailand), Singapore, Kuala Lumpur (Malaysia), Jakarta (Indonesia), Ho Chi Minh City (Vietnam), Manila (Philippines)	Study areas	Thailand, Singapore, Malaysia, Indonesia, Vietnam, Philippines (nationwide)
Six households in each country 36 respondents in total	Sample size	900 samples in each country 5,400 samples in total
September–October 2018	Survey period	June 2018

Home-visit study: Targeted categories and respondent eligibility

Smart home

Users of the following products and services:

· Smart speaker (with an interface for operating home appliances by voice. Excluding those that can simply connect via Wi-Fi or Bluetooth)
· Home appliances and home security that can be operated by smartphone (TV, air-con, lighting, security cameras, etc.)
· Voice operated cleaning robot
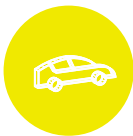
Smart car

· Absolute requirement: Connects car and smartphone via Wi-Fi or Bluetooth to play music or videos
· Relaxed requirement: Has selected and purchased a passenger car by themselves in the past year (car must have been delivered)

Online shopping

Users of the following products and services:

· Mobile payment
· Paid subscription services (movies, music, fashion, etc.)
· Frequent use of e-commerce sites (e.g. does all shopping online, use of at least 5 times per month, excluding food deliveries)

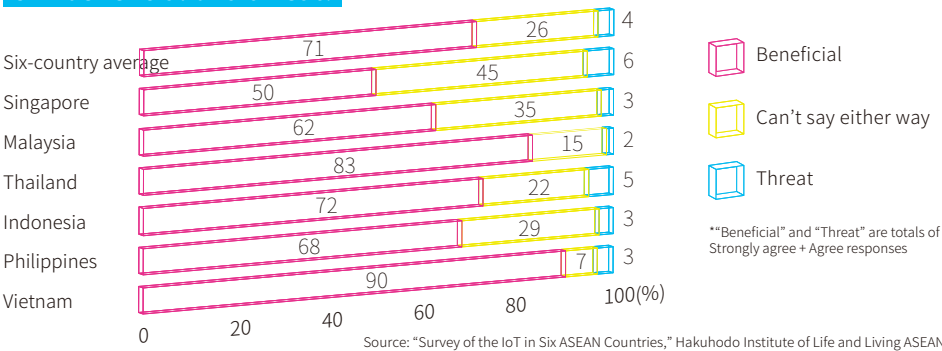## People in ASEAN love technology, but feel "information fatigue"

Everyday lifestyle attitudes (Total for Strongly agree + Agree)

(%)	I obtain information before others	I always like to try out new products	I am very familiar with the latest trends in technology	I think I stare at my smartphone screen too much	Selecting products is sometimes bothersome	Recently I feel overwhelmed by too much information
Six-country average	68	66	59	70	50	48
Singapore	64	61	49	68	59	51
Malaysia	51	53	52	65	43	30
Thailand	71	64	57	68	52	54
Indonesia	71	65	60	74	39	41
Philippines	87	79	73	80	59	65
Vietnam	67	72	61	65	50	45

Source: "Survey of the IoT in Six ASEAN Countries," Hakuhodo Institute of Life and Living ASEAN

Around 70% accept AI as beneficial

Is AI beneficial or a threat?

	Beneficial	Can't say either way	Threat
Six-country average	71	26	4
Singapore	50	45	6
Malaysia	62	35	3
Thailand	83	15	2
Indonesia	72	22	5
Philippines	68	29	3
Vietnam	90	7	3

*"Beneficial" and "Threat" are totals of Strongly agree + Agree responses

Source: "Survey of the IoT in Six ASEAN Countries," Hakuhodo Institute of Life and Living ASEAN

Intention of using the IoT is high, but ownership still lags

Usage and intention of using various IoT devices

Currently using (Six-country average) / Intend to use (Six-country average)

	Currently using	Intend to use
Fitness bands that record behavior	17	48
Smart security (smart locks, smart keys, security cameras, etc.)	14	51
Voice-operated home appliances (refrigerator, etc.)	13	50
Robot vacuum cleaners	9	54
Driver assistance systems, driverless cars	10	50

Source: "Survey of the IoT in Six ASEAN Countries," Hakuhodo Institute of Life and Living ASEAN

Home-visit study: 1. Smart homes

From separate management of tasks to centralized operation via smart gadget

There is a shift from life with separate appliance switches and timers, to centralized operation using Assistive Media and gadgets like smartphones and smart speakers. Smart technology costs much less than buying a new home appliance, while offering comfort and accuracy that lets users say goodbye to troublesome routines.

"A smart home rather than a beautiful home" (Indonesian male, 41)
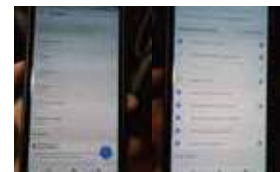
"I resolve everyday routines in one go" (Singaporean male, 29)

"My smart speaker knows everything about me" (Malaysian male, 33)

From screen-dependent physical UIs to multi-tasking voice UIs

These *sei-katsu-sha* used to spend a lot of time looking at smartphone, TV and other screens. They now turn to voice-operated devices in order to break free from the screen. Thanks to that, they are now enjoying more communication and face-to-face time with their families.

"I'd like to take my eyes off my smartphone screen at least while I eat breakfast" (Filipino male, 37)

"I just say 'Good night' to the smart speaker and bedtime is effortless. This enables me to enjoy bedtime with my wife" (Singaporean male, 29)

"The smart speaker helps us enjoy our time as a family!" (Malaysian female, 46)

From feeling concerned from not being able to check how things are at home to peace of mind from being able to check at any time

For ASEAN *sei-katsu-sha*, protecting their home is a major concern. They have a strong desire to constantly check the situation at their home to check whether a thief is breaking in, see if the maid is working properly, or to check if their children have returned from school. With an inexpensive CCTV system, they are able to check the situation at home any time via smartphone, liberating them from anxiety when they are away.

"As I am able to check my home CCTV and the smart lock on my front door on my phone, I can ask a delivery agent to put the parcel in the house even when I'm away." (Singaporean female, 35)

"I check my home CCTV every half hour on my smartphone when I am away." (Filipino male, 22)

"I no longer feel a sense of panic when I'm not home!" (Singaporean female, 29)

From inconvenience and inaccuracy from asking people for help to the convenience and accuracy of tech-based help

In ASEAN, where many families hire maids, there is a difference between "tech helpers" (help from machines) and "human helpers" (maids). One respondent explained: "When you ask a maid to perform a task, you need to change how you teach them according to the person. There is inconsistency in their work, not to mention the concern about stealing. However, if it's a machine, you can just tell it once; the job is stable and getting it to perform a task is stress free."
Assistive Media can potentially reduce the stress and trouble *sei-katsu-sha* may feel from asking others for help.
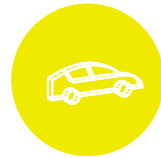

"Our family is less irritable since going smart with our appliances." (Indonesian male, 41)

"The cleaning robot takes the stress out of having to ask the maid" (Thai male, 39)

Home-visit study: 2. Smart car

From troublesome tasks before leaving the house to smooth, stress-free departures

Feeling lost inside the car park or not being able to get into the car because it is too hot are now things of the past. With a smartphone app connected to the car, *sei-katsu-sha* can find their parking spot right away. They can also turn the car's air-con and engine on remotely. Not only does this ensure the car is cool and comfortable, it also means they can get going as soon as they hop in the car.

"No more losing my car in parking lots!"
(Thai female, 25)

"When it's blazing hot outside, I can turn on the air-con before I get in the car." (Thai female, 25)

From the need to decide on a destination before leaving to serendipitous discoveries while on the road

It takes time to prepare in advance where to go and what to eat before driving. Today, *sei-katsu-sha* use Assistive Media installed in the car. They can ask the car to find a "nearby Chinese restaurant" and make a reservation immediately by calling, all by voice command. As the car sometimes suggests new, popular restaurants, some *sei-katsu-sha* stop planning pre-departure.

"My car gives me restaurant suggestions, and I love discovering new places to eat out!" (Singaporean male, 43)

From wild, dangerous driving to safe driving data serving as an incentive

Some *sei-katsu-sha* have become more aware of safe driving as driving behavior becomes a valuable incentive that affects their insurance premiums.
Apps provided by car insurance companies acquire data on driving conditions such as degree of dangerous driving and excess acceleration. Good driving can reduce premiums, so it is natural that they become more careful drivers.
In ASEAN, where traffic accidents are a significant social issue, efforts are underway to create a win-win situation for drivers and companies.

"My driving data reduces my premiums, so I'm going to drive safely!" (Malaysian male, 34)

From repairing the car once problems arise to monitoring the car's condition to detect problems early

For those who are not familiar with cars, things that need to be inspected often go unnoticed unless a problem occurs. Nowadays, many car companies offer systems that detect abnormalities at the earliest stage and notify the driver. Detecting problems and fixing them rather than fixing them after they occur is likely to become a habit.

"I don't need to be a car expert, as the app lets me know its condition with push notifications!" (Thai female, 25)

From frustration in congested traffic to enjoyable driving even in congested traffic through connectivity

Living in the ASEAN region, traffic congestion is a daily struggle for drivers. For many, finding ways to spend time in the car comfortably during a traffic jam is an important issue. Some *sei-katsu-sha* connect their smartphones and their cars, enabling them to look at maps and video clips. "When I get stuck in a traffic jam, I watch YouTube or listen to an audiobook to relax. Sometimes I call my friends and talk."

"Even in heavy traffic, I want to enjoy spending time in my car" (Indonesian male, 25)

Home-visit study: 3. Online shopping

From storing information in one's memory to storing Me Data online

Previously, we needed to store information on things we wanted and needed to buy in our memories. Online shopping websites can now help with that task. On the websites, you can get real-time information on what's selling, learn about trends and find what you want easily. There is a "Favorite" section to save things you like for later. Storing information on things we want on a website is a new purchasing behavior.

"I 'Like' all information that catches my eye on shopping websites and social media" (Filipina female, 22)

"Before buying, I check what items I could sell at a good price on shopping websites" (Thai female, 28)

"Shopping websites are like a warehouse of information on trends" (Indonesian female, 22)

"Just looking at all the items in my Wish List brings me such joy!" (Indonesian male, 41)

From general shopping journey (identifying – screening – finalizing) to being matched with products of interest by AI

The purchasing behavior journey used to be simple—from becoming aware of the product, to becoming interested in it, and considering purchasing it. Today, AI technology is able to learn and collect data on our interests and preferences and items that we often purchase, and display products we might be interested in on the recommendation sections of shopping websites. In social media, one promotional advertisement can cover the whole process from awareness to purchasing.

ASEAN *sei-katsu-sha* highly appreciate the fact that Assistive Media proposes products they might be interested in to them. Many of them actively browse and click their favorite information in order to update their preferences and get better results from Assistive Media.

"I can't resist clicking on the recommended items" (Indonesian female, 35)

"I love it how ads are targeted to my interests" (Indonesian female, 42)

"It's great to be able to get new product promotions based on my own data" (Malaysian female, 34)

From buying things when you want them to being matched with the best time to buy by AI

Shopping carts and wish list features within online shopping websites have created a change in purchasing behavior. Instead of purchasing items they want right away, *sei-katsu-sha* place them in the shopping cart and wait for the right time to buy them (discounted shipping, special sale, etc.). Also, by putting their favorite items in the shopping cart, the website will automatically analyze the content of the shopping cart and alert the user about related sales information. Purchase timing matching by Assistive Media is changing *sei-katsu-sha*'s purchasing behavior.

"I fill my cart with items I want, and wait for the deal info to flood in!" (Malaysian female, 34)

"I set an alarm to alert me to flash sale start times!" (Indonesian female, 22)

"My Wish List is my waiting-for-discounts list" (Malaysian male, 33)

Emerging new behaviors among ASEAN *sei-katsu-sha*

Bye-bye Boring Routines

The start of breaking free from actions unconsciously repeated daily that take time but need to be done

Streamline fragmented actions to break free from boring routines

Automate troublesome actions to break free from boring routines

Simplify time-consuming/laborious actions to break free from boring routines

Make habitual actions enjoyable to break free from boring routines

ASEAN early adopters of smart home technologies and smart cars are trying to streamline fragmented actions as much as possible, simplify time-consuming and laborious actions, automate annoyances in their lives and make habitual actions enjoyable.
As they start to break free from non-productive actions that take time but need to be done, actions that they unconsciously repeat every day (boring routines), they can be more creative and spend more time doing the things they enjoy.

A purchasing process optimized for each individual

Match-Me Journey

Matching   Matching

Identifying   Screening   Finalizing
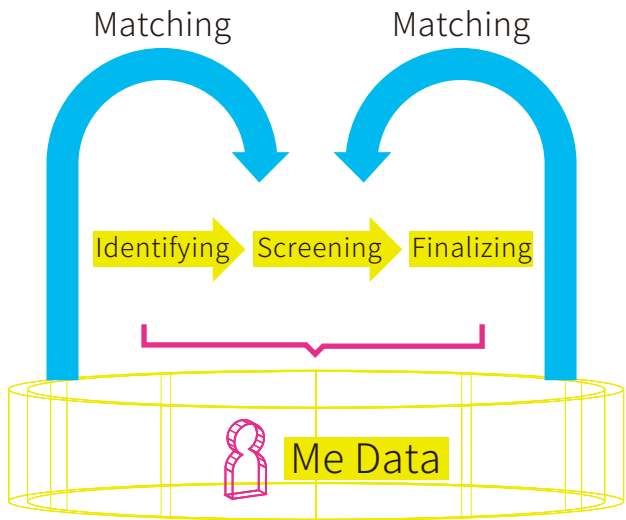
Me Data

With the adoption of Assistive Media, Me Data—information detected during the purchasing process, items of interest, searched items, and intended purchases—is accumulated both proactively and automatically.
Also, by leveraging the stored Me Data, AI automatically matches brands with *sei-katsu-sha* and sometimes *sei-katsu-sha* themselves wait to be matched with a better time to buy. Data is accumulated at various points in the existing purchase behavior model, and at various points this Me Data is leveraged for matching.
The "Match-Me Journey," which combines Me Data and Matching—key words of this new age—is a purchasing process optimized for each individual.
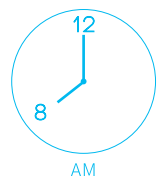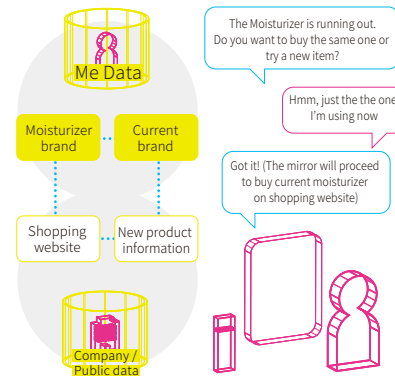
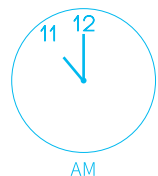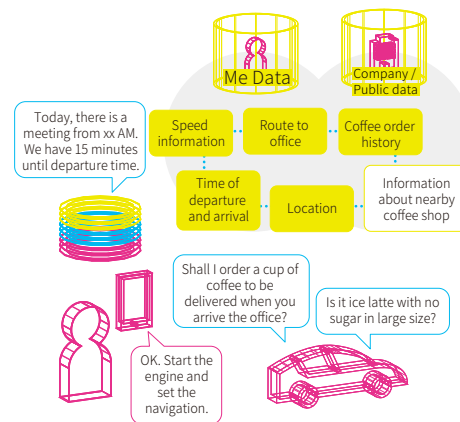# A day in life: The future of ASEAN *sei-katsu-sha* with Assistive Media

Takes over the boring routine
"moisturizer subscription"

In the morning, when you are in the bathroom, the smart mirror alerts you that your moisturizer is running out. It then asks whether you want to "replenish the same item" or "try a new item." When you ask it to "buy the usual," the smart mirror processes data on the moisturizer you usually buy, links it with data on a shopping website you frequently use in your Me Data, then places an order on that website automatically. Sei-katsu-sha will increasingly rely on IoT and the way they order specific things will become non-specific.
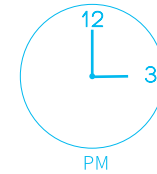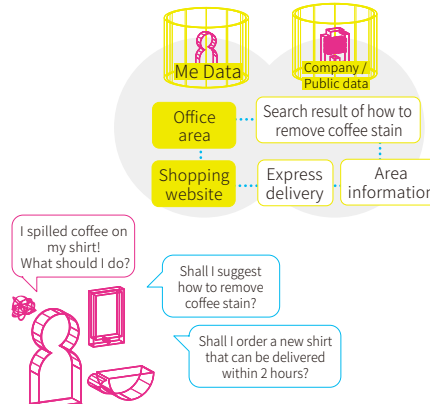
7 AM

Me Data
- Moisturizer brand
- Current brand
- Shopping website
- New product information

Company / Public data

- The Moisturizer is running out. Do you want to buy the same one or try a new item?
- Hmm, just the the one I'm using now
- Got it! (The mirror will proceed to buy current moisturizer on shopping website)

Takes over the boring routine
"getting ready to commute"

When it's time for you to leave home, the smart speaker reminds you that the departure time is approaching and lets you know the day's schedule. When you say "start the engine," the car automatically turns itself on ready to depart. The navigation system will be on and lets you know the estimated arrival time. While commuting, Assistive Media takes over everyday routines, such as ordering coffee and having it delivered to the company.
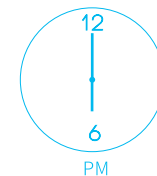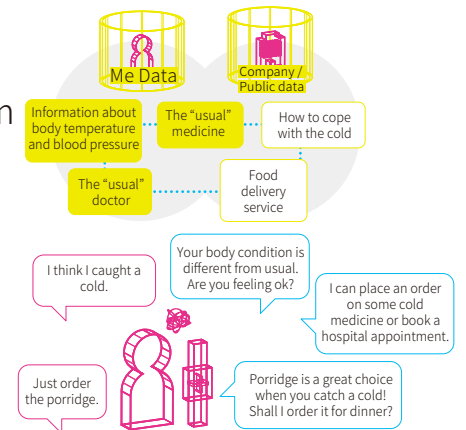
8 AM

Me Data
- Speed information
- Route to office
- Coffee order history
- Time of departure and arrival
- Location

Company / Public data
- Information about nearby coffee shop

- Today, there is a meeting from xx AM. We have 15 minutes until departure time.
- Shall I order a cup of coffee to be delivered when you arrive the office?
- Is it ice latte with no sugar in large size?
- OK. Start the engine and set the navigation.

Provides a solution to the problem
"I spilled coffee on my shirt..."

If you accidentally spill coffee on your shirt at work, you can ask your smartphone for help. Connecting external data and Me Data, it will propose multiple solutions, including stain removal methods and a shopping website that can deliver a new shirt to your office within two hours. Even if you do not give detailed instructions, Assistive Media will suggest a number of solutions. The more Me Data accumulated, the smarter Assistive Media will become.
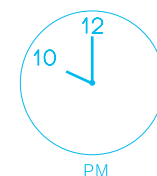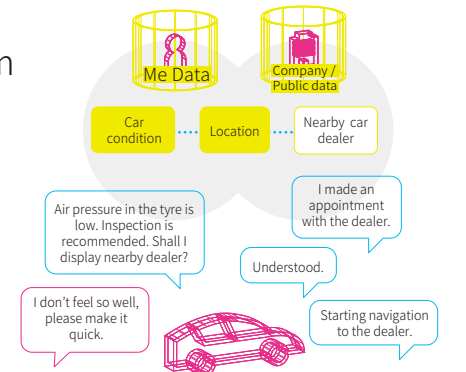
11 AM

Me Data
- Office area
- Shopping website

Company / Public data
- Search result of how to remove coffee stain
- Express delivery
- Area information

- I spilled coffee on my shirt! What should I do?
- Shall I suggest how to remove coffee stain?
- Shall I order a new shirt that can be delivered within 2 hours?

Provides a solution to the problem
"monitor my health"

A smart watch on your wrist constantly checks and accumulates data on your health, such as your body temperature and blood pressure. In addition to notifying you when there is a change in your physical condition, it can suggest solutions optimized for you based on accumulated Me Data and external data, such as how to cope with a cold, order a healthy meal, buy cold medicine or book a hospital appointment.
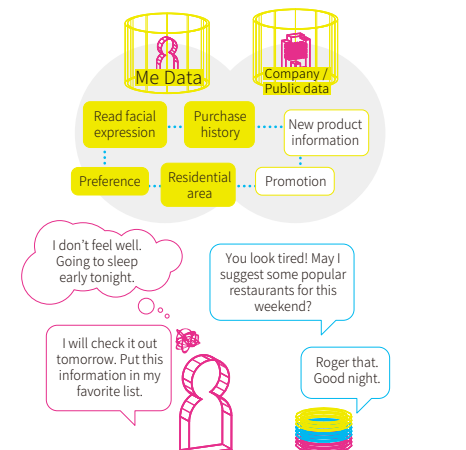
3 PM

Me Data
- Information about body temperature and blood pressure
- The "usual" doctor

Company / Public data
- The "usual" medicine
- How to cope with the cold
- Food delivery service

- I think I caught a cold.
- Your body condition is different from usual. Are you feeling ok?
- I can place an order on some cold medicine or book a hospital appointment.
- Just order the porridge.
- Porridge is a great choice when you catch a cold! Shall I order it for dinner?

Provides a solution to the problem
"car maintenance"

The car automatically detects the parts that need to be inspected. It will send you a notification and share it with your dealer. It will search for the nearest dealer you can go to, make a reservation and navigate directions to that location. Now you can drive with the car always in perfect condition.

6 PM

Me Data
- Car condition
- Location

Company / Public data
- Nearby car dealer

- Air pressure in the tyre is low. Inspection is recommended. Shall I display nearby dealer?
- I made an appointment with the dealer.
- I don't feel so well, please make it quick.
- Understood.
- Starting navigation to the dealer.

Provides mood-based recommendations for
"restaurants for the weekend"

If you arrive home feeling tired and go to bed, you can say "good night" to the your Assistive Media. It will turn lighting and air-conditioning to "sleep mode," tell you tomorrow's schedule, and set the alarm.
Moreover, as it is able to detect your tiredness, it will suggest ways for you to relax, such as a restaurant promotion for the weekend. Assistive Media not only takes away inconveniences in your life, it can also make proposals suited to your mood.

10 PM

Me Data
- Read facial expression
- Preference

Company / Public data
- Purchase history
- New product information
- Residential area
- Promotion

- I don't feel well. Going to sleep early tonight.
- You look tired! May I suggest some popular restaurants for this weekend?
- I will check it out tomorrow. Put this information in my favorite list.
- Roger that. Good night.

What you need to do now to prepare for widespread adoption of Assistive Media in the future

Sei-katsu-sha's brand needs will change dramatically with the adoption of Assistive Media

Before

After

I want this!

Disappearing needs

Just get the usual!

By breaking free from life routines, *sei-katsu-sha* themselves will no longer choose the items they normally buy and items that anything will do

Non-specific needs

Only the result matters Any method will do!

With the optimized purchasing behavior of Match-Me Journey, *sei-katsu-sha* will no longer be able to ascertain their own needs and will focus on results only, unconcerned about how their problems are solved and emotional needs are met

Specific needs (items/functions)

What brands can do to tackle these changes

Purpose branding
Redefine brand value according to purpose and situation

Searching for specific products or brands will decrease, which means that Assistive Media will select the top ranking product for everything and sei-katsu-sha will come to pick that item (No. 1 in top of mind, best matching, top search result, No. 1 ranking, lowest priced, etc.). There will come a time when products that just have a certain level of functionality/image or a premium feel will not be selected. When it does, companies and brands will need a meaningful purpose. They will need to clearly identify how and when their products benefit *sei-katsu-sha* with a clear purpose and situation relevant to everyday life scenes. It will be vital for brands to be top of mind for *sei-katsu-sha* in these aspects.

Life solutions
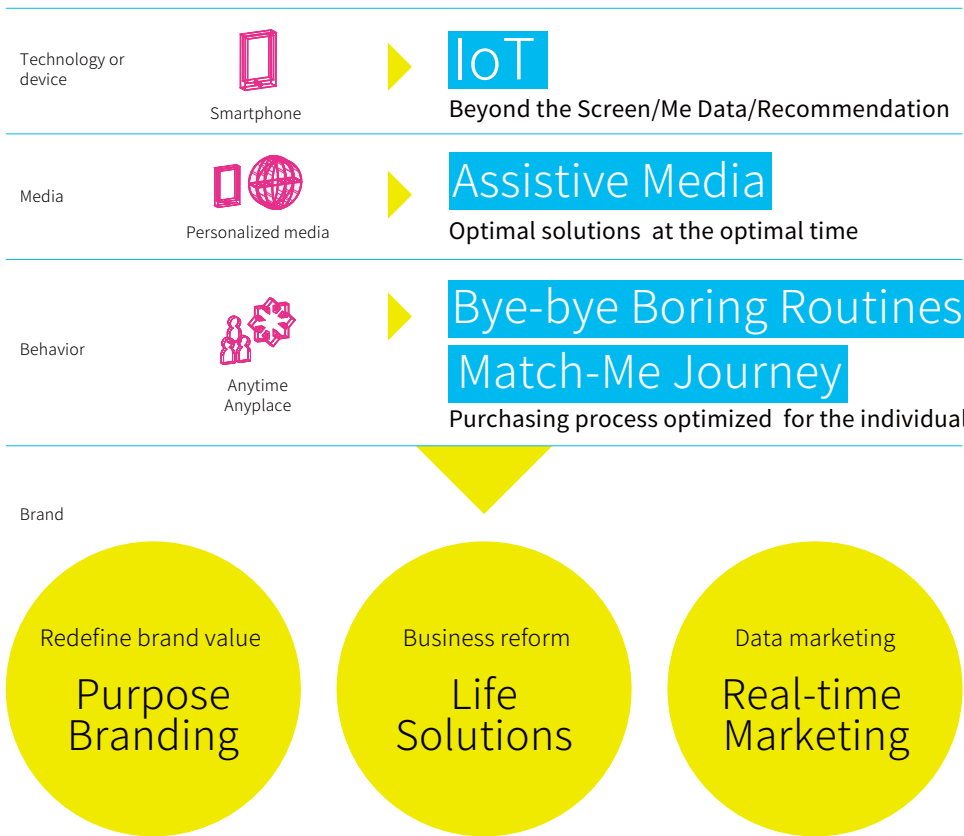Provide a comprehensive solution not only for "things" but also the problems of *sei-katsu-sha*

For brands to be selected by *sei-katsu-sha* and Assistive Media, rather than simply selling products, they will need to expand the scope of their offering to encompass "life solution" services that cater to the needs of *sei-katsu-sha*. When it is difficult to offer these services on their own, companies could partner with other companies to create a large ecosystem that offers life solutions. What *sei-katsu-sha* purpose, situation and emotion can your brand cater to? Start considering now what kind of presence you want to be for *sei-katsu-sha*.

Real-time marketing
Personalized messages and timing for each individual

With the adoption of the IoT, it will be possible to acquire abundant personal data on *sei-katsu-sha*, or Me Data, so the method of communication will also be personalized according to the situation of each *sei-katsu-sha*.
Also, if you can link your data (first-party data) and Me Data, visualizing how far the relationship between target and brand has progressed becomes possible. You'll be able to plan the optimal moment and optimal message, communicate it, then verify the results individually. To optimize brand and *sei-katsu-sha* engagement, start acquiring Me Data and develop and utilize your company data as soon as possible.

Prediction on the next technology after the smartphone and the changes it will bring
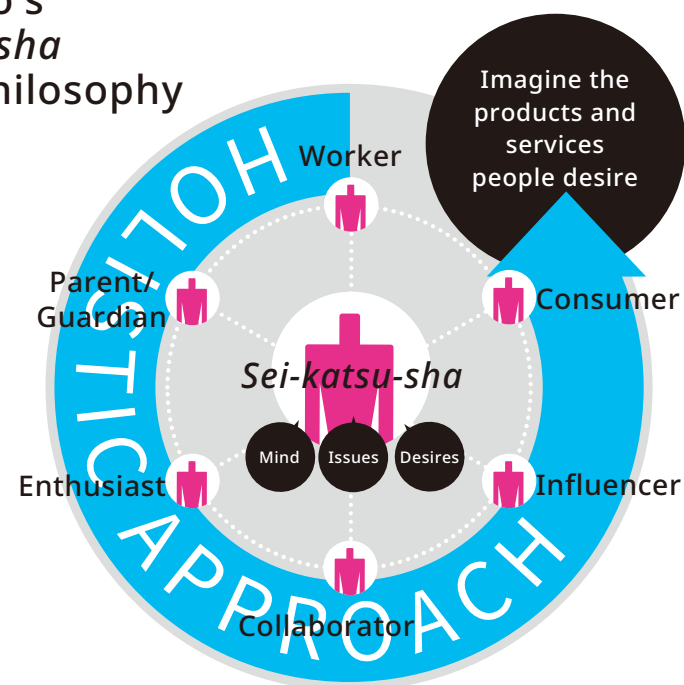
Technology or device	Smartphone	**IoT** Beyond the Screen/Me Data/Recommendation
Media	Personalized media	**Assistive Media** Optimal solutions at the optimal time
Behavior	Anytime Anyplace	**Bye-bye Boring Routines Match-Me Journey** Purchasing process optimized for the individual
Brand		

Redefine brand value
Purpose Branding

Business reform
Life Solutions

Data marketing
Real-time Marketing

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 to help companies with their marketing efforts in ASEAN countries.

Hakuhodo's *Sei-katsu-sha* Insight philosophy

HOLISTIC APPROACH

Imagine the products and services people desire

Worker
Parent/ Guardian
Consumer
Sei-katsu-sha
Mind   Issues   Desires
Enthusiast
Influencer
Collaborator

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.

1
Gain a bird's-eye view of the overall ASEAN market as it becomes more integrated through the AEC

2
Understand what makes each country's *sei-katsu-sha* distinctive

Epilogue

In the age of Assistive Media that will arise with the adoption of the IoT, *sei-katsu-sha* will break free from boring routines, follow the Match-Me Journey, a purchasing process optimized for the individual, and have diminished or non-specific brand needs.

Amid these changes in *sei-katsu-sha*, brands will need to redefine their own value, change their business to offer life solutions, and build their marketing around Me Data.

We hope that you will join us in embarking on preparations for the Assistive Media age, which is steadily approaching even in the ASEAN region.

"THINK FUTURE-FORWARD"

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