

10th Anniversary HILL ASEAN *sei-katsu-sha* studies 2024





A decade ago, Hakuhood Institute of Life and Living ASEAN (HILL ASEAN) embarked on a remarkable journey to unveil the soul of ASEAN society; to truly hear the stories that shaped ASEAN *sei-katsu-sha*’s lives. It was the whispers of hidden aspirations in everyday moments that piqued our curiosity.

This anniversary booklet isn’t just a collection of research; it’s a celebration of a decade filled with heart-warming encounters, eye-opening discoveries, and the privilege of being welcomed into the homes of remarkable individuals across Southeast Asia.

Every year we publish findings on one major research topic and in the process, travel across the diverse landscapes of ASEAN, visiting Thailand, Indonesia, Singapore, Vietnam, Malaysia, and the Philippines. Right in the heart of their homes, we meet the people whose lives we seek to understand. Here, amidst the comforting rhythms of their daily routines, conversations unfold. Through this carefully crafted approach, HILL ASEAN aims to reveal the unseen intricacies of ASEAN life—the subtle nuances that often go unnoticed.

As the intricate mosaic of ASEAN life continues to evolve, so too will our exploration. The pursuit of understanding will constantly be our guiding principle, for as long as human experiences diversify, the need for connection will remain a constant thread.

As we embark on a new decade, let’s raise a glass to the vibrant tapestry of ASEAN! Here’s to continuing our journey of uncovering the region’s unique soul, nurturing an environment where brands and individuals can thrive in harmony.

Farhana E. Devi Attamimi
Institute Director
Hakuhood Institute of Life and Living ASEAN

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“Greetings”

Thank you very much for your continuous support for Hakuhood International and HILL ASEAN.

HILL ASEAN’s activities are an iconic symbol of Hakuhood’s *sei-katsu-sha* Insight philosophy. Under the holistic approach of observing people not merely as “consumers” but as “people with lives,” we aim to gain deep insights into their true desires and envision how future society will unfold, along with associated implications for marketing. It’s fair to say that HILL ASEAN is the heart of Hakuhood International’s business in ASEAN.

In recent years, the ASEAN market has experienced rapid growth, and we firmly believe that deep understanding of the lifestyles and values of ASEAN *sei-katsu-sha* is vital for marketing activities more than ever. We will continue to strive not only to conduct research that will help our clients’ marketing activities, but also to be an inspirational organization that can offer new perspectives to help create better societies.

Shuntaro Ito
President & CEO, Hakuhood International



“Be the North Star of *sei-katsu-sha* Insight!”

Congratulations to HILL ASEAN on the 10th anniversary of your founding.

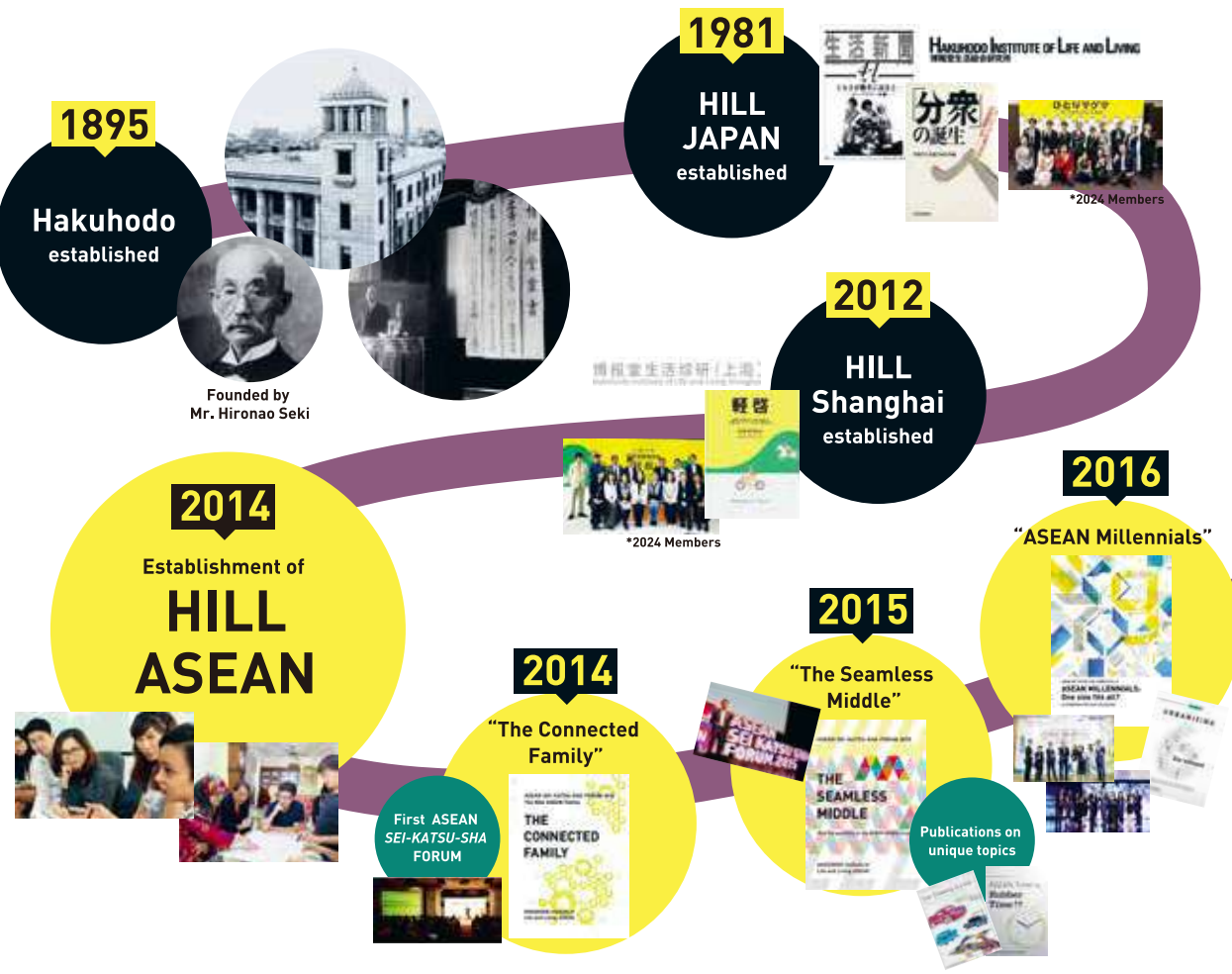
HILL is Hakuhood’s “soul place.” My hope is that the think tank continues to be the place that advances the Hakuhood Group’s core philosophy, *sei-katsu-sha* Insight. This philosophy is like the North Star shining brightly to show us where we are and how to navigate to where we should head next. To do so, we ourselves must always shine. We also need to constantly take on new challenges and make the impossible possible, no matter how many tries it takes. We are here to uncover eye-opening findings about *sei-katsu-sha* in ASEAN.

I hope that each member of HILL ASEAN will continue their research activities into ASEAN *sei-katsu-sha* with pride. I look forward to seeing you continue to find new insights and ideas on ASEAN *sei-katsu-sha* that will inspire our clients, the media and Hakuhood Group members, and also to you posing “good questions” that will move society forward.

Shuzo Ishidera
Executive Manager, Hakuhood Institute of Life and Living, Japan



Chronicle of HILL ASEAN: A decade of achievement



Hakuho was founded in 1895. The Hakuho Institute of Life and Living was established in 1981, followed by the establishment of HILL Shanghai and HILL ASEAN. Here we trace the history of HILL ASEAN up to 2024.



“Thinking about the happiness of sei-katsu-sha is what makes us unique”



As the head of Hakuho’s ASEAN office in 2014, I strongly felt the need for a think tank to conduct research into ASEAN *sei-katsu-sha* to instill the *sei-katsu-sha* Insight philosophy, Hakuho’s DNA, at our offices in the region. I worked hard to launch HILL ASEAN in 2014, cooperating with people at Hakuho who shared same passion. HILL Japan was established in 1981, the year before I joined Hakuho. At the time, HILL regularly published a publication called *seikatsu Shimbun* (生活新聞). I remember it well as an innovative booklet that quickly identified changes in Japanese *sei-katsu-sha* from surveys and fieldwork to make recommendations. Back then, I was in charge of delivering *Seikatsu Shimbun* to clients.

Among HILL ASEAN’s activities, the most memorable research for me is “Rubber Time,” which researched the “sense of time” among ASEAN *sei-katsu-sha*. This research theme started with a simple question that I had while living in Thailand, “Why are people in this country so tolerant of lateness for appointments?” By looking at the world as a *sei-katsu-sha* myself, I came up with a big question that gave us deep insights into real *sei-katsu-sha*. The motto of Hakuho is to constantly consider what makes *sei-katsu-sha* happy and what will make society a better place. This makes us unique. I look forward to seeing HILL ASEAN continue to expand this strength and all their activities into the future.

Masato Saito
Former Officer in charge of ASEAN, Hakuho International

“The unforgettable experience of launching HILL ASEAN with international colleagues”



During my time as a researcher at Hakuho Institute of Life and Living in Japan, I was involved in both the launch of HILL Shanghai in 2012 and HILL ASEAN in 2014.

Looking back to 2012–13, there was a discussion at Hakuho Group headquarters about launching a think tank to conduct *sei-katsu-sha* research in ASEAN as well. One day I bumped into Masato Saito, who was visiting the headquarters on a business trip, and learned that he was interested in establishing a *sei-katsu-sha* research think tank in ASEAN as well. We call this our “chance encounter at Akasaka Biz Tower” (where Hakuho HQ offices are located), and it was this coincidence and our enthusiasm that led to the birth of HILL ASEAN.

I believe that the *sei-katsu-sha* observation skills cultivated through HILL ASEAN’s activities and the bonds among its researchers are treasures of the Hakuho Group. I hope that HILL ASEAN will continue to develop further without losing its uniqueness, and continue to be a think tank for *sei-katsu-sha* that brings bright insights to clients and society.

Masataka Yoshikawa
Professor, Kyoto Seika University

Insights into HILL ASEAN’s operations



HILL ASEAN conducts research and presentations on different topic every year. In this section, we are going to introduce our journey.



“Proud of the history of over 400 home visits and observing more than 40,000 ASEAN *sei-katsu-sha* data”

I have supported HILL ASEAN’s *sei-katsu-sha* surveys every year since the launch of HILL ASEAN in 2014, up to and including 2024’s special 10th anniversary study. HILL ASEAN has made almost 400 home visits over the past 10 years and has a cumulative sample size of about 40,000 people for its online quantitative survey. We have been listening to the voices of *sei-katsu-sha*, observing their lives, and creating insights and suggestions. I believe that no other research organization can do the same, which is why we are able to make proposals that inspire our clients and even society. I also believe that HILL ASEAN is unique in its creativity, which enables it to discover emerging changes and trends among ASEAN *sei-katsu-sha* before anyone else, and initiate its research. I am always amazed at how quickly HILL ASEAN grasps shifts in *sei-katsu-sha*.

Research methods are evolving, and results can now be easily obtained online, through the use of AI, and so on. However, the method of actually visiting *sei-katsu-sha*, observing what they say and how they live, and deriving insights from these factors is a strength of HILL ASEAN that cannot be replaced no matter how developed AI becomes. I would love to continue supporting HILL ASEAN in conducting in-depth and creative *sei-katsu-sha* research and insights, and also look forward to looking back on our journey in the future, when we celebrate HILL ASEAN’s 20th anniversary.

Feifei Suo, Yi Consulting Inc.

Expanded Families, Connected Wirelessly



“The internet is a necessity for my family more than an air conditioner.”
—Vietnam

Why Connected Families?

When discussing ASEAN *sei-katsu-sha* and their culture, family relationships are often cherished as one of the most important things in their lives. But what would occur as ASEAN families, traditionally comprising extended members, confronted changes arising from urbanization and economic growth?

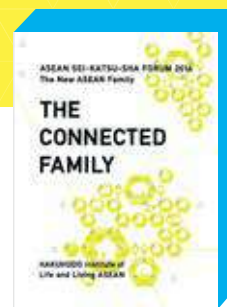
Would they become more divided and prioritize personal space? And what role would technology play in this dynamic?

For context, this study was conducted in 2014, a time when communication technology was still rapidly expanding across wider segments. We aimed to observe how families adapt to technology and whether it would alter our approach to them as marketers.

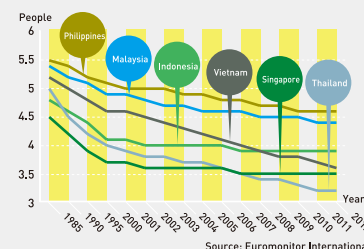
Human interaction is more important than housing condition

During our visits in ASEAN countries, we found that even families with low incomes prioritized buying smartphones over improving their housing condition, such as by installing an A/C unit or fixing a missing wall.

This could be one of the reasons for the rapid growth of internet and smartphone usage in the region, where staying connected is valued more than physical comforts.



CHANGES IN NUMBER OF PEOPLE PER HOUSEHOLD



Economic growth and urbanization keep pushing down the number of people in households

What we thought

ASEAN families would be
DIVIDED

Rapid economic growth and urbanization would change the ASEAN family structure from a preference for extended family to a more divided family.

What we found

ASEAN families were still
CONNECTED

Rapid urbanization also brought the adoption of communication technology on a broader scale, which had helped facilitate family members staying connected even when they were physically apart.

Essential roles of technology for ASEAN families

We discovered a variety of ways in which technology was playing a significant role in assisting families that were apart to stay connected. For instance, social media was being used for storing family memories, messaging apps as bulletin boards, and video calls as a tool to provide real-time interaction. It's important to note that this was a time before online video conferencing became mainstream.

Conclusion: ASEAN *sei-katsu-sha* fully utilize digital and technology to help them stay connected with their extended family, even when they were apart

Urbanization in ASEAN countries has split extended families into more nuclear families. But despite physical structures that suggest separateness, they still yearned to stay close to their extended family, or as we called them, their Connected Family, through smart technology which, in some cases, was a higher priority than spending to improve their household condition.

What brands can do:

In the Connected Family, anybody can become an influencer. Depending on the topic, anyone in the family, regardless of age or status, can be a key opinion leader influencing the whole family's decision-making.

Brands can also foster word-of-mouth, or “fam-to-fam” communication within the family, as recommendations from family are considered more trustworthy and more likely to be acted on.

Social media for storing family memories
Singapore: Recording child growing up

Chat app, the family bulletin board
Kuala Lumpur: Sharing jokes to suras of the Koran
Jakarta: Sharing product fliers, promotional info

Video calls for bonding with family members ("fam-to-fam" bonding)
Bangkok: Christmas party in Manila & the USA
Manila

Smartphones over air conditioning
Aging apartment complex, no cooler

Visiting the mall in search of Wi-Fi
Jakarta: Has no Wi-Fi at home and quickly uses up monthly data allowance. Goes to nearby mall to use the Wi-Fi there

ASEAN CONNECTED FAMILIES

One clan's IT leader, who supplies the whole family with handy tips.

This child won a children's photo contest after the entire family voted for the entry.

A Segment Defined By Mindset



(I identify as middle class because...)
 “I can spend on what I like without worrying about what my family thinks.”
 —SEC D, Thailand



Why investigating the ASEAN middle class is important

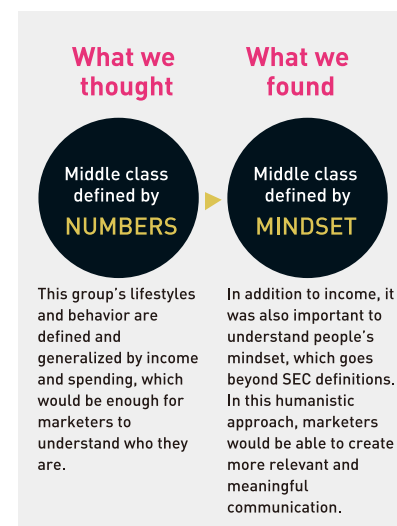
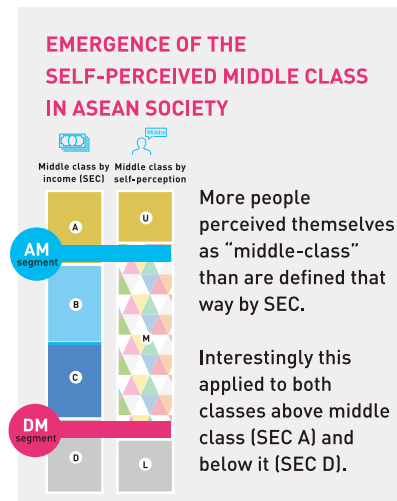
Marketers have classified consumers through a socio-economic class (SEC) lens, using attributes such as income and spending. While this may make measurement easy, the data strip human beings down to mere numbers. Driven by our *sei-katsu-sha* Insight philosophy, we’re compelled to investigate the lifestyles of the ASEAN middle class, an important population cohort in this region.

What does “middle class” mean to ASEAN *sei-katsu-sha*, and how does it influence their way of life and consumption style?

Perceptions of “middle class” are broader than the SEC definition

In this study we found that ASEAN people who identify as “middle class” do so not solely based on their income levels, but rather their ability to achieve their desired lifestyle. This makes the middle class broader than that defined by SEC.

For instance, someone in SEC A may perceive themselves as middle class as they compare themselves with those with more wealth, while a person in SEC D might feel they belong to this category if they’re content with their current circumstances.



Conclusion:
The ASEAN Seamless Middle:
 A society shaped not by SEC definitions, but the degree to which people can attain their desired lifestyle

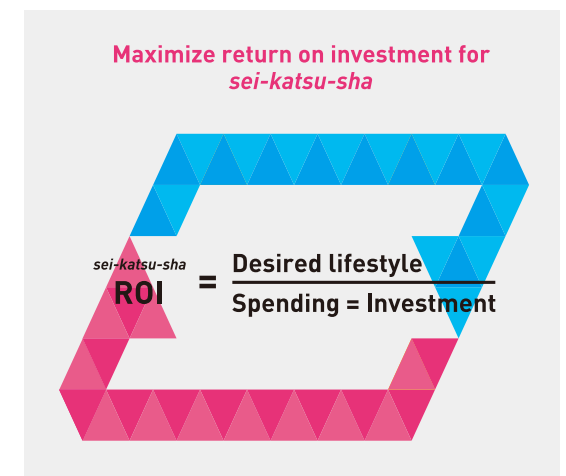
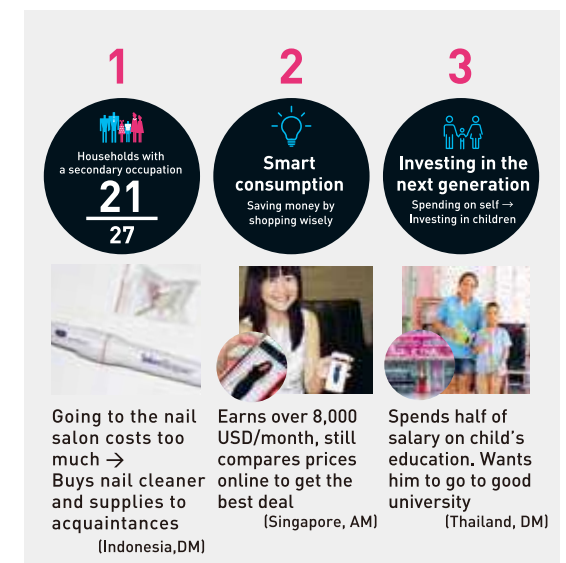
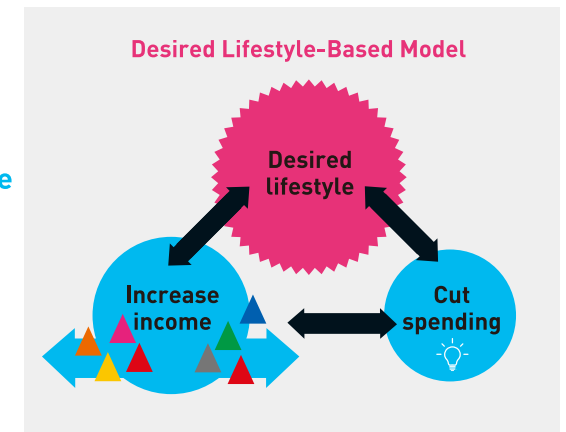
The Self-perceived Middle Class comprises ASEAN *sei-katsu-sha* who have a seamless perception of themselves as middle class, regardless of their income bracket. They find ways to live their desired lifestyle by seamlessly juggling income and spending through three steps:

- (1) Having a secondary income, utilizing their networks, neighbors, hobby, and technology
- (2) Reducing expenses by finding deals online and finding the right financing scheme, and
- (3) Turning spending into future income, e.g. a hobby turned business or investing in their child’s education.

What brands can do:

For the Seamless Middle Class, spending can be considered an investment and so the benefit (value) is not as important as the return on investment (how the purchase leads to achieving the desired lifestyle).

Therefore, we recommend brands to focus on maximization of *sei-katsu-sha* ROI, such as by repositioning spending as an investment instead of a cost, or using *sei-katsu-sha* as corporate ambassadors for attaining their desired lifestyle.



One Label, Two Different Generations



“The future is uncertain, so I keep a stable job and work on the side.” —Born 1980s, Philippines

“Not taking on a challenge is the biggest risk you can take.” —Born 1990s, Indonesia



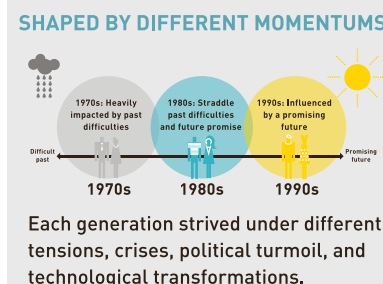
Why identifying two kinds of Millennials is important

Millennials a.k.a. Gen Y, are classified as those born between the early 1980s and 2000. Before Gen Z, they were the generation constantly in the marketing spotlight. Marketers treated the whole generation with the same approach, assuming they thought and behaved the same way.

But did they really? Intrigued by this, HILL ASEAN set out to take a closer look at those born in the 1980s and 1990s to see if they were what the label generalized them to be.

1970s, 1980s and 1990s: All built differently from one another

Individuals who grew up in the 1970s, 1980s, and 1990s underwent different momentous technological leaps in their younger years, which uniquely influenced their lifestyles, interactions with technology, and purchasing habits. The combination of historical background and the challenges they faced has shaped distinct mindsets across each generation.



The younger group is more optimistic and expressive whilst the older value stability and secure progress.

What we thought

Millennials are all **INDIFFERENT**

The term “Millennials” would be good enough for marketers to generalize people born during the 1980s–1990s, assuming that they share similar mindsets and behavior.

What we found

Millennials has **TWO TYPES**

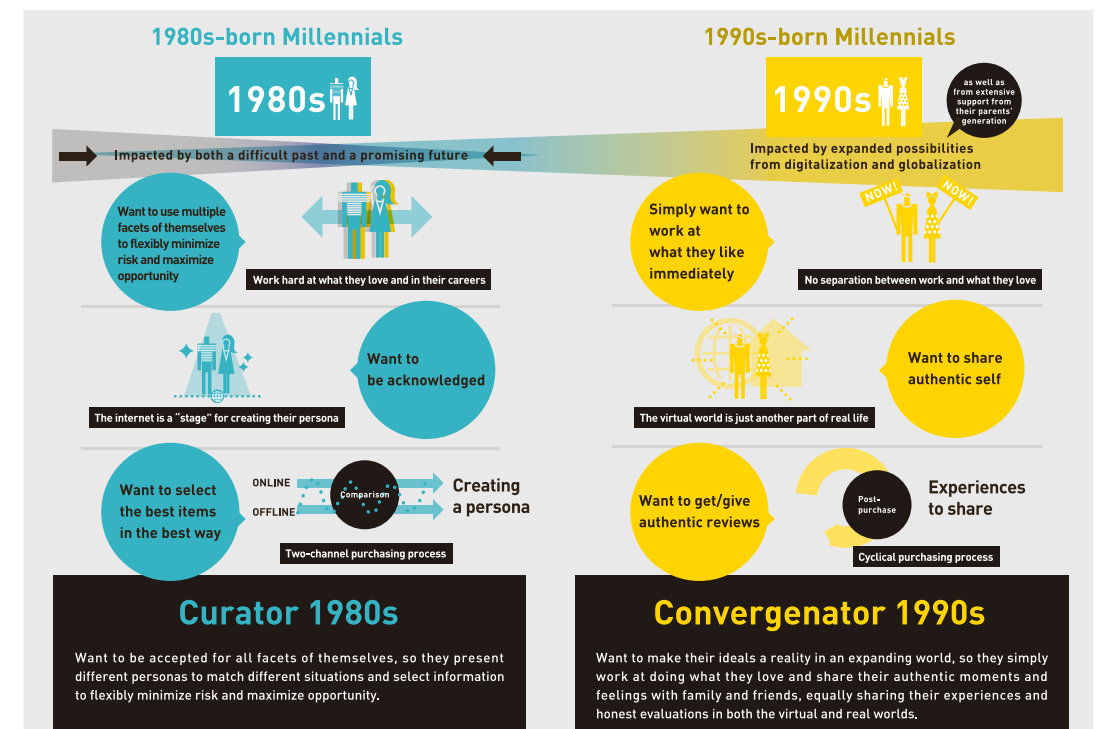
The term “Millennials” was too broad to define and generalize people born in both the 1980s and 1990s, as they experienced different social contexts and circumstances during their formative years, leading to diverse personalities, lifestyles and consumption behavior.



Conclusion

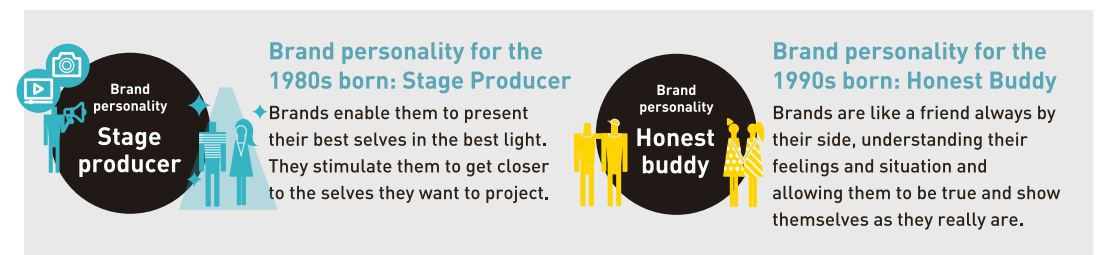
We found that Millennials born in the 1980s are vastly different. The “Curator 1980s” are people who were impacted by a difficult past, but also a promising future. They treat the internet as their “stage” to shine on and be acknowledged for their persona, hence, they tend to focus on selecting the best items in the best way.

The “Convergenator 1990s” were born in the era of endless possibilities fueled by digitalization and globalization. Social media is just another part of real life, so they want to share their authentic self as it is. When it comes to purchasing behavior, they want to exchange and share authentic opinions with others.



What brands can do:

As we identified the differences in Millennials born in the 1980s and 1990s, we concluded that the broad stroke of a “digital campaign” would not cut it. Marketers and communicators need to be more vigilant in defining the Millennials they want to reach.



Not Your Typical Breadwinner & Homemaker



"I think there are no 'women's chores' or 'men's chores.'"
—Indonesia

Why understanding gender roles in the household is important

At the time of study (2017), various major global organizations were advocating for gender equality, but the issue remained largely unaddressed within ASEAN households. Traditionally, husbands were seen as breadwinners and wives as homemakers, a dynamic still prevalent today. Therefore, understanding evolving gender roles within ASEAN households was crucial to determining who holds the power domestically.

Who truly rules the house in ASEAN households?

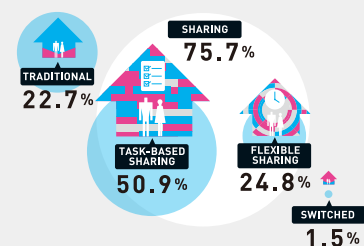
From tradition to togetherness: The rise of sharing households

The study dismantled the typical stereotype about ASEAN families, with less than a quarter following the traditional model, while 75% operated under a Sharing household structure. This collaborative approach is redefining the way couples navigate domestic responsibilities; chores, childcare, and decision-making are shared relatively equally, signifying a move towards greater gender equality within the home.

Traditional:	Husband is responsible for work and other activities outside the house and wife is responsible for work within the house
Task-based sharing:	Husband and wife divide household chores, childrearing, education, work, and daily shopping equally
Switched:	Husband is responsible for work within the house, and wife is responsible for work and other activities outside the house
Flexible sharing:	Household chores, child rearing, education, work, and daily shopping are handled by whoever can do it at the time



MAJORITY OF ASEAN HOUSEHOLDS SHARE THEIR ROLES



Our survey revealed a majority of ASEAN households have role sharing, a stark difference from the traditional role of husband as breadwinner and wife as homemaker.

What we thought

Household roles are **TRADITIONAL**

Despite modernity brought about by globalization, ASEAN people would tend to continue conservative and traditional household roles and relationship styles.

What we found

Household roles are **SHARED**

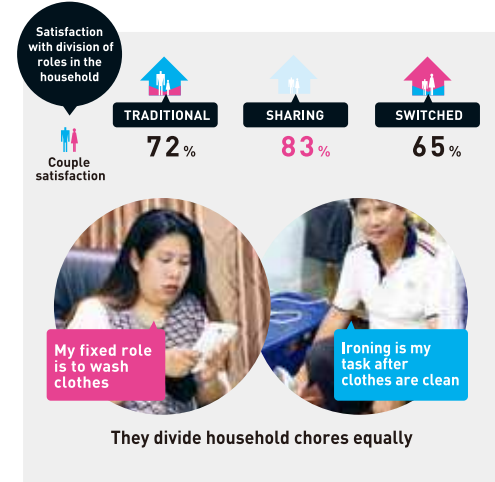
The traditional ASEAN household seemed to be less dominant as couples find more progressive ways that help them navigate life together, regardless of their gender.

Flexible or focused: Understanding Sharing household models

We identified two ways sharing works:

(1) The Adaptable Approach: Flexible Sharing. Couples prioritize efficiency, with whoever is available taking on tasks and errands. This on-the-go approach allows both partners to contribute based on their schedules, fostering a sense of teamwork.

(2) The Structured Split: Task-Based Sharing. This model thrives on pre-assigned duties. Specific chores are designated to each partner, creating a clear division of labor. This approach ensures accountability and can streamline household tasks.



Joint purchasing power: Couples make decisions together

ASEAN couples share purchasing power. While wives often handle daily necessities, husbands do more Task-Based Sharing household chores. Most couples collaborate on major purchases, meaning marketers should consider couples as a unit and tailor messages to resonate with both partners.

Shared responsibility, shared satisfaction: The winning combo

Our study reveals a key link between the Sharing model and marital satisfaction. Couples in Sharing-type households reported the highest levels of contentment with how they manage their domestic duties. This suggests that shared responsibility fosters a sense of fairness and partnership, leading to greater happiness for both spouses.

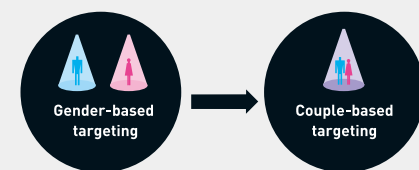
Conclusion and what brands can do:

From gender to couple: A new approach for marketers

So who ruled the house? The answer is neither rules; they share. 75% of ASEAN families in this study belonged to the Sharing type, where husbands and wives cross gender role boundaries and actively support each other with what they are capable of doing, and make most purchasing decisions together.

Based on this finding, for more effective communication, marketers should not approach the target solely based on their gender, but with couple-based targeting. They should also shift their view of the decision-making process from only "male" or "female," to a "couple's journey."

New perspective for targeting strategies



Stereotyping household relationships leads marketers to the wrong decision-maker in the purchase journey.

Fixed roles based on gender	Share roles regardless of gender
Only husband or wife makes purchasing decision	Husband and wife make purchasing decisions together
Target only husband or wife	Target the couple (husband and wife)

What's Next After the Smartphone



"I would rather have a smart home than a beautiful home."

—Indonesia

Why IoT was an important subject for ASEAN in 2018

In 2018, amidst the widespread adoption of smartphones globally, we were eager to look into what could be the next significant technological advancement. What would be the "next smartphone"? Some experts suggested that IoT devices would soon outpace mobile phones in usage. Therefore, we embarked on a study to investigate the implications of widespread IoT adoption, people's interactions with technology and associated behavioral changes, so that we could better prepare a proactive response regarding this change.

Looming fatigue from information overload led to the welcoming of AI support

Despite the fact that ASEAN *sei-katsu-sha* love to be up-to-date and always like to try out new things, 70% agree that they overuse their smartphone and almost half of them feel overwhelmed by too much information. This might explain why a whopping 71% think of AI as beneficial, as it could be one possible solution to help manage this problem.

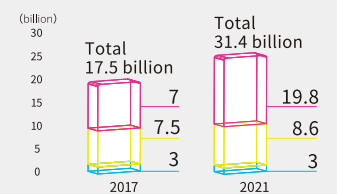
70% I STARE AT MY SMARTPHONE TOO MUCH

50% SELECTING PRODUCTS IS BOTHERSOME

48% I FEEL OVERWHELMED BY TOO MUCH INFORMATION

Is AI beneficial or a threat?
"Beneficial" **71%**

IOT DEVICES TO SURPASS MOBILE PHONES IN 2018



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.

Technology evolves over time and sometimes faster than most can comprehend. This study anticipated how the expansion of the internet through IoT will change *sei-katsu-sha*'s behavior and how brands can better approach them.

What we thought

THE FUTURE IS FAR

We had started hearing about IoT and AI, but did not have a clear image of how they would impact us. They seemed far in the future and irrelevant to ASEAN lifestyles at the time.

What we found

THE FUTURE IS HERE

More than anticipated, ASEAN *sei-katsu-sha* were quick to adopt IoT to assist their lives and save them money. It was also interesting to see how they customized their own IoT gadgets using different parts from inside and outside their countries.

Emerging new behaviors among ASEAN *sei-katsu-sha* from adoption of IoT: Breaking free from boring routines and expanding their capabilities

Early adopters of IoT or smart technologies in ASEAN sought to simplify and streamline their lives, aiming to eliminate tedious tasks and household hassles. This newfound efficiency enabled them to redirect their focus towards more creative pursuits and activities they genuinely enjoy.



Smart home



"Our family is less irritable since going smart with our appliances." (Indonesia, 41 y/o)



Smart car



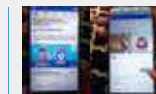
"The cleaning robot takes the stress out of having to ask the maid" (Thailand, 39 y/o)



Online shopping



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



"My driving data reduces my premiums, so I'm going to drive safely!" (Malaysia, 34 y/o)

"I fill my cart with items I want, and wait for the deal info to flood in!" (Malaysia, 34 y/o)

"It's great to be able to get new product promotions based on my own data" (Malaysia, 34 y/o)

From personalized to assistive: The shift in media enabled by IoT

Thanks to IoT, digitalization that had been evolving on smartphones was able to spread "beyond the screen." The collection of more "Me Data," or day-to-day information, will enable not only personalized recommendations, but also assistance with finding solutions, too.

Conclusion: Think future forward for ASEAN *sei-katsu-sha*, who always welcome progressive changes that make their lives better

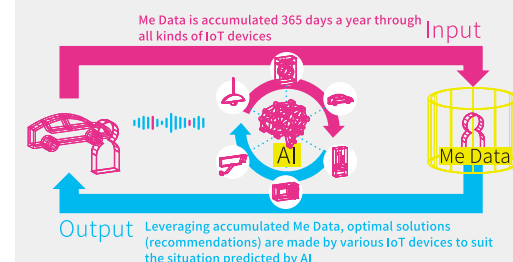
The rise of IoT and adoption of AI will enable ASEAN *sei-katsu-sha* to break free from boring routines and demand more optimized purchasing journeys that eliminate the overload of information. (= Match-Me Journey)

What brands can do:

Amid this change, brands should redefine their own value, shifting away from function and instead focusing on meaningful purpose to provide not just "things" but comprehensive life solutions they communicate to *sei-katsu-sha* at the optimal moment and timing.

IoT = Assistive Media

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



Prediction about the "next smartphone" and 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

Marketing recommendations



Special Interviews with HILL ASEAN Family



“Design proposals for future lifestyles from conversations with real *sei-katsu-sha* today”

When we launched HILL ASEAN and began researching ASEAN *sei-katsu-sha*, we decided to dig deep into the near future, rather than the present or further into the future.

HILL ASEAN research allowed me to meet everyday people living in various ASEAN countries and areas. I found much inspiration from interacting with, talking to, and discussing things with them. It gave me the opportunity to observe their ways of living, and be exposed to their values and ideas. As a Japanese expat living in Thailand at the time, I was very grateful for the experience.

HILL ASEAN's strengths are its diversity, and the cross-over of creative perspectives and ideas generated by planners in six ASEAN countries and Japan. Thanks to this unique environment, HILL ASEAN is able to make proposals that capture in-depth *sei-katsu-sha* insights. Hakuodo's *sei-katsu-sha* ideas are born from the concept “Genchi-Genbutsu” (visit the place, meet the *sei-katsu-sha*, and make discoveries by living there as a *sei-katsu-sha* oneself). I hope that HILL ASEAN researchers will continue to enjoy the challenge of weaving insights from their findings, identifying marketing issues and proposing solutions that are useful to clients and Hakuodo.

Goro Hokari
Founder, Hakuodo Institute of Life and Living ASEAN
Former Institute Director and Managing Director



“Be a symbol of the *sei-katsu-sha* Insight philosophy for another 10 years”

We set two goals when we launched HILL ASEAN: (1) To establish *sei-katsu-sha* Insight philosophy, the core of the Hakuodo Group, in the ASEAN region and (2) To make HILL ASEAN an organization that would continue to operate for 10 years.

The word “ASEAN” in a nutshell refers to the six countries that are the subject of HILL ASEAN's research. Each country has its own unique background, culture, and *sei-katsu-sha* insights, therefore, it was a great challenge for HILL ASEAN to decide what and how to proceed with the research. Although we started as a think tank established by two Japanese planners, we were able to create a network of research activities thanks to the help of researchers from each country. They have knowledge from their own countries that they brought to the meeting room. This network system, in which team members think and talk about the ASEAN region's *sei-katsu-sha*, was one of the key factors of HILL ASEAN's success.

I hope that HILL ASEAN will continue to be a symbol of the *sei-katsu-sha* Insight philosophy, leading to a bright future for the Hakuodo Group, our clients, and society, and that it will continue to prosper in the ASEAN region. I look forward to witnessing HILL ASEAN as a beloved and active institute that deep-dives ASEAN *sei-katsu-sha* and provides a stream of new perspectives in the next 10 years and beyond.

Yusuke Miyabe
Founder, Hakuodo Institute of Life and Living ASEAN



“Keep your minds fresh to pursue the happiness and future of *sei-katsu-sha*”

HILL ASEAN was launched to expand Hakuodo's unique spirit and *sei-katsu-sha* Insight philosophy in the ASEAN region. When we ask why clients in ASEAN choose to work with Hakuodo, the answer always goes back to our *sei-katsu-sha* Insight philosophy.

This philosophy means we do not just observe *sei-katsu-sha* objectively and suggest solutions for their aspirations and needs, but we also live as individual *sei-katsu-sha* ourselves. While this framework is our guideline wherever we are, the findings and ideas we come up with differ based on the place and culture. I believe that's the most interesting part of our philosophy. You might say that Hakuodo is a marketing and innovation company that conducts anthropology in different places in the world.

I hope HILL ASEAN team members continue to think with fresh minds about the happiness of ASEAN *sei-katsu-sha*. Building a better society requires being interested in people, wanting to make them happy, envisioning their future and constantly imagining a better one. I hope that HILL ASEAN will be at the forefront of this.

When we think about the future, we tend to focus on what might happen in a few years. But learning history is one of the most important keys when considering the future as it gives us lots of hints about why *sei-katsu-sha* think and act the way they do. Please do not lose sight of this. Dig deep to find the “why.” HILL is a people-powered laboratory. Everything starts with people. I hope HILL continues to conduct research into people and their lives with curiosity so as to make great proposals.

Tatsushi Shimamoto
Former Director, Hakuodo Institute of Life and Living, Japan



“The fun of expressing new perspectives through design”

I've been responsible for almost all artwork for HILL ASEAN for the past 10 years, including the design of key visuals and presentations for Forums. Every year, I value two points when it comes to the designing process. The first is to create designs that do not detract from the character of the Japanese organizations Hakuodo and HILL Japan. The second is to express the research theme using Japanese designs as a base, while adding colors and shapes that represent the uniqueness of ASEAN. Also, since HILL ASEAN's output is data-based documents, it is important that the design has a playful feel that makes clients and other readers want to read to the end.

Before starting the actual design, HILL ASEAN team members share the theme of the year with me and I sometimes participate in workshops to observe how the members discuss the topic. I'm always amazed by the new perspectives and discoveries that HILL ASEAN makes. In addition to their findings, they also suggest how brands should respond to the theme and that's the uniqueness of the advertising agency to which think tank belongs.

As a HILL ASEAN fan, I look forward to much more exciting *sei-katsu-sha* research from them and to supporting them to visualize their ideas with new designs in the future.

Masafumi Mizutori
Art director, Musubi

Global Issue, ASEAN Perspective



“Doing good is boring, it should be fun to do good”
—Thailand

Why Conscious ASEANs matter

Environmental and social issues are key global topics we tend to see on the media. From our survey, we found that by 2019, 78% of ASEAN *sei-katsu-sha* claimed to be living a “Conscious Lifestyle.” When environmental and social issues are covered in the global media, the focus is often how critical the issues are and the tone and manner are serious. How do ASEAN *sei-katsu-sha* see and respond to these issues? Do they act and think the same way as the global trend? As more companies demonstrate their efforts at being conscious as well, we were curious if this works here in ASEAN.

Care for their near and dear ones

One important thing we immediately discovered was that Conscious ASEANs were doing it their own way. They were not just aware about the issues, but were living them. For them, these were not just global issues, although they understood that. They were more real to them because they live amidst the issues. Their solution was to make Consciousness part of their lifestyle, doing what they could in their immediate surroundings.



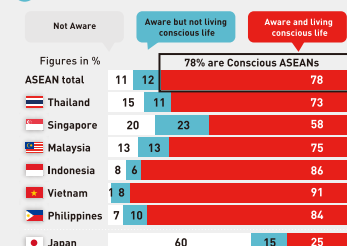
ASEANs ARE NOT DISTANT WITH CONSCIOUS LIFE

What is a Conscious consumer?



“People who want to positively contribute to environmental and social causes when making purchase decisions and brand selection.”

0 What is your stance on conscious lifestyle?



0 Why are you taking conscious actions?



What we thought

Issues are DISTANT

Environmental and social issues would be somewhat distant for ASEAN *sei-katsu-sha*. Only a handful of ASEAN *sei-katsu-sha* would feel a sense of urgency about them through their education and knowledge.

What we found

Issues are NEAR & DEAR

ASEAN *sei-katsu-sha* actually live with and are affected by the issues and are conscious about their living environment. They therefore prioritized the issues, which were near and dear to them.

Accepting good vibes only

The generally happy-go-lucky ASEANs prefer not to express themselves in an extreme manner. They respect others' opinions so they tend to communicate with positivity. They're not one to put too much pressure on themselves, and make sure to leave room for their comfort. For these reasons, Conscious practices can be easily incorporated in their lifestyles and be continued in the long run.



"I never boycott a brand. I rather put more focus on supporting and buying brands with good CL practice." (Vietnam, 28 y/o)



"I like to share positive news on social networking sites and make people feel good, rather than sharing something negative and cause anger." (Malaysia, 38 y/o)

Conclusion: Unite with Consciouslites to tackle issues

We coined the term “Consciouslites” for ASEAN *sei-katsu-sha* who are living Conscious Lifestyles. ASEAN Consciouslites find enjoyable ways to spread the Consciousness message with a supportive spirit and respect towards others. Environmental- and social issue-based approaches to ASEAN Consciouslites need to be balanced. While they care about these issues as they live amongst them, they also want to create real impact and feel good about it as well. ASEAN Consciouslites often organize Conscious initiatives with others around them, so brands can support their actions by tackling issues together.

What brands can do:

Brands themselves also initiate the Conscious actions, too. But instead of conventional CSR, why not start Conscious & Sustainable Initiatives (CSIs): Corporate initiatives for good causes that are continuous, solve problems and are embedded in the business process.

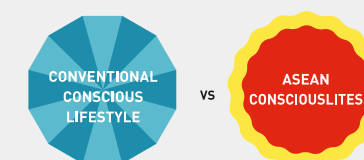
“Environmental impact” is the 3rd rank

ASEAN Total (%)	Function	Price	Environmental impact	Design	Brand image
Household Product	56	46	38	33	26
Food/Beverage	30	68	38	12	28
Skincare/Personal Care/Cosmetics	46	46	39	20	37
Automobile	43	50	40	38	33
Electric Appliance	53	49	36	35	36

*Base: Conscious ASEANs

Important but realistic

Preferring positive and casual vibes in their Conscious Lifestyles, they also know being too extreme doesn't solve issues. Therefore, environmental and social factors are not the top priority in their consumption, just one point of reference. They choose to balance, and take a more realistic approach.



CONVENTIONAL CONSCIOUS LIFESTYLE	VS	ASEAN CONSCIOUSLITES
For the planet For "them"	TRIGGER	"NEAR and DEAR" For "myself", "us"
HEAR about the problem	SITUATION	LIVE the problem
Agitated and antagonistic	ATTITUDE	Relax and respectful
Informational and straightforward	ACTION	Fun, fashionable, and picture-perfect



CSR Programs	THE SHIFT	CSI
Annual	INVOLVEMENT	Continuous
Program-based	ACTION	Embedded in every process
Outside the company	SCOPE	Inside and Outside

The Generation Balancing Me And We



“Success in life is happiness that you feel. As long as you feel happiness every day, I think you are successful.”
—Thailand

Why knowing Gen Z better is important

The absence of major studies about ASEAN Gen Zers resulted in a lack of real understanding of the group and in some ways had created stereotypes and mischaracterizations of them. Often they have been misjudged as an extreme version of Millennials more individualistic and addicted to social media. As a segment showing rapid expansion in ASEAN, there was a growing need to unravel the mystery of this generation, especially in the context of the ASEAN region.

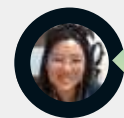
In this study we looked into different aspects of Gen Zers' lives that are commonly misinterpreted. **Who is ASEAN Gen Zers? What is their aspiration and happiness?**

Happiness is success

Having grown up in an era where social media have allowed us to see the lives not only of celebrities but also micro-influencers and ordinary people, ASEAN Gen Zers know that achieving higher is not necessarily leads them to success and happiness. They are good at setting achievable goals, and prioritizing their own satisfaction/ contentment more. High awareness of mental health means ASEAN Gen Zers place the same importance on mental health as on their physical health.

HAPPINESS IS SUCCESS

Life is about acquiring happiness
“Agree”
91.0%
(ASEAN Gen Zers)



“Achievement, is not necessarily materialistic. It is more about self-satisfaction.”
—Singapore

Our survey revealed the majority of ASEAN Gen Zers in fact see ultimate success in life not in the achievements they make in their careers, but in the happiness they feel.

What we thought

Aspirations are for
ME OVER OTHERS

Sei-katsu-sha often see Gen Zers as an individualistic generation, apathetic and overly dependent on their connected devices. This is due to their affiliation to the preceding generation: The Millennials.

What we found

Aspirations are for
ME AND WE

In fact, Gen Zers never comprise their aspirations or the feelings and hopes of others. They creatively seek ways to ensure fulfillment for themselves and others them.

Four types of ASEAN Gen Zer happiness

So what, then, is happiness to ASEAN Gen Zers? Here are the four types of happiness unique to ASEAN Gen Zers.



Happiness for “Me” and “We”

“Becoming a government official is ideal for me, because I will be able to provide my family a stable life while having enough time to have me-time.”
—Thailand

For ASEAN Gen Zers, happiness is only achieved when not just they, but also those around them are happy. That means their family, friends and society. They never compromise their individual aspirations, but try to find creative ways to realize both their own happiness and that of their significant others.

Make Society a Happier Place

ASEAN Gen Zers want to make their families, society and even their country happy. They are passionate activists for environmental and social issues. Social media, which is often thought of as their playground, is actually a place where they actively contribute to solving those issues by raising awareness and taking action.



“I’m certainly affected by the topic of LGBTQ, because I have a lot of friends who are a part of it. Most of them are not accepted by their parents, and I want to use different platforms to practice our freedom of speech. Now, we have this privilege to voice out our opinion and speak up for those people who are affected of these different issues.”
—Philippines



Treasure Mental Health

“Money is not our top priority. We also prioritize mental health. It’s one of our treasures in life.”
—Malaysia

Increasing awareness of mental health has led ASEAN Gen Zers to prioritize their mental well-being as much as their physical health. They consider maintaining good mental health a top priority, and actively strive to keep depression and worries at bay in their lives.

Blend in to Harmonize

Gen Zers compartmentalize social media usage as they respect privacy and are conscientious about which part of their life they want to share to which group of *sei-katsu-sha*. They are also willing to take part in social issues by leveraging the power of social media.

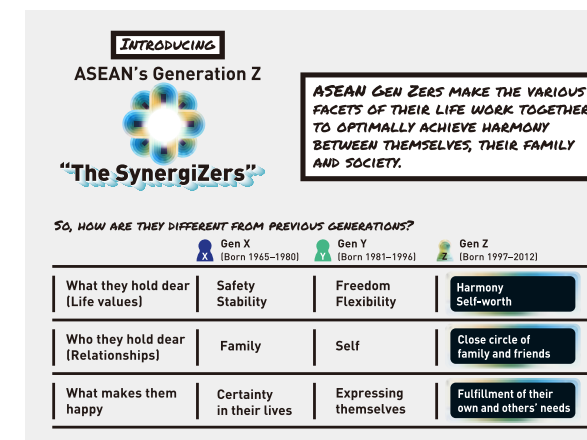


“It’s not about being a different person in front of different groups, it’s about adjusting to each social group so that we can be accepted and relatable to them.”
—Indonesia

Conclusion: ASEAN GEN Zers are SynergiZers.

They pursue the harmonious happiness of their selves, their families and society

The various facets of their life work together to optimally achieve harmony between themselves, their family and society. They believe that their quest for inner happiness and self-worth are key to creating the good vibes and positive energy necessary to build relationships and connections with others. They seek to fulfill themselves to fulfill others.



What brands can do:

Embrazive Marketing

As Gen Zers care about harmony, brands that value diversity and inclusion are more likely to be supported by Gen Zers. Brands can do this by offering products and services that further the idea that “no one gets left behind.”

One thing to note is that brands don't have to use aggressive tones.

Utopias of Love, Respect and Self-Growth



“There is no hierarchical structure in my Fandom community.” —Board Game Fandom, Singapore

Why fandoms are significant

Fandoms are a powerful force impossible to ignore. They saw rapid growth in passion and size during the COVID-19 pandemic. With increased free time due to staying home, ASEAN *sei-katsu-sha* explored different fandoms more than ever. Interestingly, 87.1% of ASEAN Fandom *sei-katsu-sha* stated their life had changed for the better thanks to their fandom. We often observe the passion for and size of fandoms, but what about the motivation behind being in one? **What motivates ASEAN Fandom *sei-katsu-sha* to be in their fandom? Why are they eagerly joining and contributing to their Fandom communities?** We explored the vast universe of fandoms in ASEAN as we believed the findings could also inspire brands to create their own fandoms.

Trigger: Inspiration and exploration are the trigger and the benefits

Triggers for joining a fandom included the desire to make life more exciting, to relieve stress or to kill time. Scores related to the desire to connect with people were also high. This demonstrated that people enter the world of fandom not just for their own enjoyment but also because they want to make their life more interesting, and to gain more access to interaction with others.

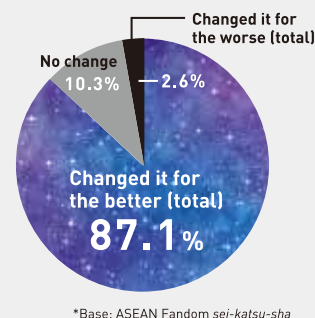
Q What events or triggers sparked your interest in the fandom?

ASEAN Fandom *sei-katsu-sha* (%)

1 I want to make life more exciting	52.8	4 I want to connect with people	41.5
2 I want something to relieve stress in life, ex. work/study	51.3	5 COVID-19	40.7
3 I want to kill time and boredom	45.6		



FANDOMS ARE LIFE CHANGING



Meaning of Fandoms

What we thought

Fandom is for **ENJOYMENT**

We thought that fandoms would be a form of entertainment where *sei-katsu-sha* could amuse themselves with things that interest them as an escape from life or to kill boredom.

What we found

Fandom is for **WHERE WISHES COME TRUE**
Regardless of who you are

The impact of joining a fandom goes far beyond just enjoyment. Many benefits of fandoms are otherwise unavailable today in ASEAN. To Fandom *sei-katsu-sha* regardless of their age, gender nationality or income, fandoms are places for self-growth, belonging and uniting to contribute to society.

Benefits: Playgrounds that fulfill the diverse life aspirations of ASEAN *sei-katsu-sha*

ASEAN Fandom *sei-katsu-sha* enjoy benefits from their fandoms beyond just feeling good and having fun. In fact, they also gain benefits that are often difficult to attain in daily life: A sense of belonging, a school to learn new things, and a place to explore new selves, among others. Fandoms in ASEAN serve as a new wonderland for realizing different aspirations of ASEAN *sei-katsu-sha*. Even during the pandemic, they provided ASEAN Fandom *sei-katsu-sha* with a life filled with hope and fun.

Platforms made with love, respect and social good by ASEAN Fandom *sei-katsu-sha*

ASEAN Fandom *sei-katsu-sha* play different roles within Fandom communities depending on their abilities, what they want to enjoy, and their motivations. Regardless of income, gender, area and nationality, all fans are treated equally through their love of the fandom topic. They are united like a real family, and utilize the power of number to make larger donations and charitable contributions.

Conclusion: Fandoms are utopias that fulfill what matters to ASEAN *sei-katsu-sha*

We coined the term “MATTER-VERSE” to explain the meaning of fandoms as entities that fulfill three key “Matters” cherished by ASEAN *sei-katsu-sha*. (1) To Matter: the desire to be treated equally and with respect, (2) To have something that matters: to indulge in feelings of love for the fandom topic, and (3) To have hopes that matter fulfilled, from learning to feeling a sense of belonging, diverse aspirations of *sei-katsu-sha* are made real. “VERSE” stands for “universe,” a hierarchy-free utopia where people are united through mutual trust. These hope-fulfilling utopias are passionately enjoyed, and expanded, by ASEAN Fandom *sei-katsu-sha* today.

What brands can do:

Build their own brand Fandom communities

Create a MATTER-VERSE out of their brand Fandom community

First, make *sei-katsu-sha* matter by allowing their feedback on products and services to be heard on a different channel. Also, make the brand matter to *sei-katsu-sha* by providing a purpose they can identify with—one they want to love and support. And lastly, fulfill what matters to *sei-katsu-sha* through the service or product. Tackle their problems and fulfill their hopes.

Utilize fandoms in marketing

Synergize with Fandom MATTER-VERSES that share the same purpose

Finding the right fandom is the very first thing to do. Instead of choosing by popularity, consider the fandom’s resonance with the brand’s purpose and potential synergies the brand/product/service can have with the fandom. Instead of just collaborating with the fandom itself, collabo-act on the Fandom community’s purpose. Helping a Fandom community ignite and prosper also helps amplify synergies with the brand.



Local artist fandom *sei-katsu-sha*, Malaysia

“When our fandom community found itself without a leader, I needed to be more active, so I started speaking out more. I’d **always** thought I was shy, but I discovered an outgoing, talkative side of myself.”

Q Why do you continue to be passionate about your fandom?

ASEAN Fandom *sei-katsu-sha* (%)

1 Can get a sense of belonging	49.1
2 The lessons that fandom topics give me are great	46.2
3 Generous support among fans in the fandom community	44.4
4 A lot of interaction between fans	42.5
5 The fandom frees me from stress	41.9
6 The fandom is constantly teaching me new perspectives and ideas	33.8

Conceptual diagrams of fandoms



No hierarchy, just love of the fandom topic



MATTER-VERSE

The ideal community that fulfills the most cherished hopes of *sei-katsu-sha*.

The Three “Matters”

The three hopes *sei-katsu-sha* seek to have met in their fandom



Under-the-Radar Strategic Stability Builders



"It's okay to be number two. Instead, I want to dedicate money and effort to having a peaceful, stable life with my family."
—Singapore

Why the emerging affluent is significant

The middle class has been the bedrock of economic growth in ASEAN for quite a while. They have both the purchasing power and the size needed to make an impact to the economy of ASEAN countries. But what happens next? We wondered why every time we took a snapshot of the upper class, it was almost like a sudden jump from the middle class. **What happened in between? Did any of the middle who "made it" show significant changes in their lifestyle or behavior?** We thought uncovering what lay in between could be key to unlocking a high-potential segment hidden in plain sight.

Background: Experienced adversity in their youth

Surprisingly, most of those we later named the ASEAN Emerging Affluent faced significant challenges growing up, including financial struggles like being unable to pay a sick or injured family member's medical bills, not getting the education they wanted, and having difficulties getting the necessities of life. Something unforgettable happened in their lives that made them strongly motivated to be wealthy one day, to fundamentally change themselves, or to improve in a particular way.

Belief in both self and an invisible hand

They are both self-reliant and reliant on a greater power. Having had a rough upbringing, the ASEAN Emerging Affluent possess a determination to create a better life for themselves through their own efforts, which has made them men and women of action. But their willpower is sometimes weakened because of fear and uncertainty about the future. Interestingly, they share a strong belief in an invisible hand (divine power or fate), though they call it by different names depending on where they live: God, destiny, heaven, *qi*, fortune, karma, or whatever. It gives them hope and courage to work harder to attain the life they aspire to.

In formulating a definition of this so-called "Upper-middle class", we considered economic circumstances in each of the ASEAN countries and referred to definitions in existing studies and surveys.

What we thought

Eager to
SHOW OFF STATUS

We tend to see *sei-katsu-sha* as middle or upper class based solely on their earnings and spending. The Emerging Affluent would be no different than the affluent, just earlier on in their wealth journeys.

What we found

Aspire to have
STRATEGIC STABILITY

The Emerging affluent are a class of their own because of their mindsets and perseverance. They are able to plan ahead and execute their plans and are humble enough to keep striving. This is why they focus on stability.

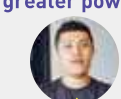
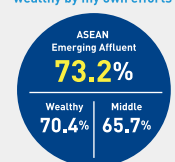


"When my parents got sick, they didn't have enough money at home and couldn't afford insurance, so they didn't get adequate medical care."
(Malaysia, 40 y/o)

TRAITS OF THE EMERGING AFFLUENT

Self-reliance + Reliance on a greater power

"I believe I can become wealthy by my own efforts"



"Key of my success is luck. I'm lucky that I met my wife who can manage money and wealth."
(Vietnam, 36 y/o)

Coming from the middle, not from old money, they know how to prioritize the most important things to focus on long-term goals.

An elusive segment: Intentionally "under the radar"

Despite the stereotype, the Emerging Affluent consciously try to remain under the radar. They have made up their minds not to indulge in high living until they achieve greater stability in life. They are also concerned about the negative consequences of leading a flashy lifestyle, which could attract unwanted attention or disrupt harmony with their neighbors.

Bigger goal: Horizontal growth

Another reason they want to remain under the radar is that, coming from middle-class backgrounds themselves, they know from their own experience and the knowledge of others that building wealth is a long game and needs focus, consistency and perhaps some sacrifice.

Conclusion: The Omnimizers

We coined the term "Omnimizer" for the Emerging Affluent in ASEAN because we could see them utilizing and maximizing all available resources for their aspiration in life: To grow consistently and exponentially towards a brighter future for themselves and their families. To do that, they need a specific set of traits and attitudes that marketers can recognize and, and having recognized them, fine-tune their efforts accordingly to better support this group to reach their goals.

	Wealthy class	ASEAN Emerging Affluent	Middle Class
Aim in life	Create more wealth for the next generation	The horizontal life asset building strategy	Want to live their ideal lifestyle
View of money	A means of privilege and mark of status	A means to preserve stability	A means to display desired lifestyle
View of success	Something passed down	Something achieved through their own work and surrounding support	Something acquired through their hard work
Consumer attitudes	Enjoy the finest merchandise, exclusive products and experiences	Enjoy consuming experiences with family. Seek maximum functionality	Enjoy buying items to display their upgraded lifestyle

What brands can do:

The 3 L's

To reach these thrivers in life, marketing needs to be redesigned in accordance with their hidden needs and desires. We can summarize these needs and desires with the "3 L's."

1 Low-key
Offer maximum functionality, not flashiness



2 Longevity
Become life planner and life consultant for the entire family

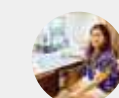
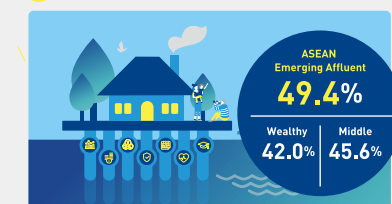


3 Love-tribution
Offer ways to enjoy and demonstrate their and their family's affluence



A HORIZONTAL LIFE ASSET BUILDING STRATEGY

"Happiness is being without financial worries"



"I make sure to save 23-25% so I have a safety net for difficult times, but I make sure to watch out of opportunities to invest that would benefit me and my family."
(Philippines, 43 y/o)

Focus on essential financial aspect such as; investment, insurance, business, etc. that provide them foundation to grow in the future.



"I don't have luxury items, but I have wealth."
(Thailand, 40 y/o)



"I'm choosing a brand that is a bit more premium than the so-called 'mass' option, as I believe the materials are better"
(Malaysia, 32 y/o)



ASEAN SEI-KATSU-SHA STUDIES 2024

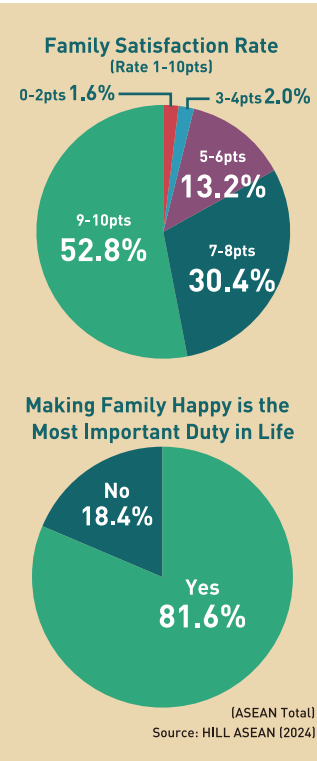
A Decade of Shift in ASEAN Families

The search to define ASEAN family values.
Preserve or denounce?

Why Explore ASEAN Families Again?

HILL ASEAN released “Connected Family” as its first study in 2014. Since then, the theme of family has remained at HILL ASEAN’s core. The concept of “family-first” endures for ASEAN people. As we celebrate the 10th anniversary of HILL ASEAN in 2024, our research theme is “A Decade of Shift in ASEAN Families.” Taking into account both external and internal factors, let’s explore how ASEAN family relationships and values have evolved over the past decade.

The ASEAN Families we Met

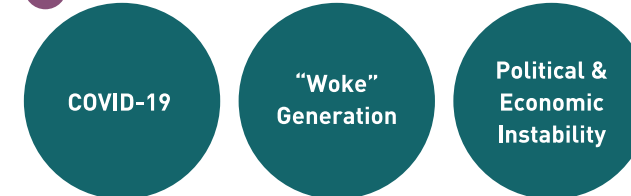


10 Years of Dynamic Shift in Family Style

1 Economic Growth and Demographics



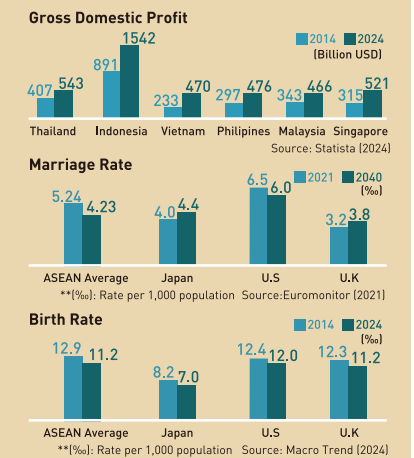
2 Social Factor



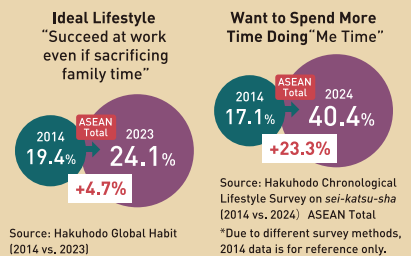
3 Value change in sei-katsu-sha



Economic Growth and Change in Family Structure



Change in ASEAN sei-katsu-sha Life Values



Big Question Are we abandoning Traditional ASEAN Family Values?

The ASEAN Families we Met

Survey Overview

Quantitative survey (questionnaire)

Survey method: Online survey
Sample size: 4,900s
Respondents: Males and females aged 20–49, SEC A–C, distributed into 3 segments: Conventional families, solos, DINKS
Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore, Japan
Survey period: January 2024

Qualitative survey (interviews)

Survey method: Home visits
Sample size: 36 families
Respondents: Males and females aged 20–49 distributed into different segments: Conventional families, solos, DINKS
Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore
Survey period: Survey period: October–November 2023



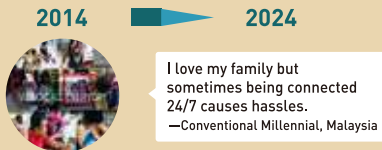
Our Findings on Family Value today

ASEAN families today mix old and new values
to balance individual aspirations and collective harmony in their own way

Emerging Values

From Always-on Connection
to Sharing-on- Demand

10 years ago, social media, texting and video calling were new and many families used them with abandon. Today, however, 24/7 always-on connection has brought hassle and boredom. Now, instead of continuous video calls and texting, uploading family posts frequently on social media serves as a way to stay connected at a comfortable distance.



We-nique Family

Kids are like a symbol flag of family: Embodying the values and creativity of the family. ASEAN families pursue uniqueness as a family unit because they are proud of their family and willing to be admired. Thus they utilize different platforms, for example celebrating traditional events in their own creative way, to showcase their family.



Bath Krathong

Mom-made guidebook for trip to Japan

Family Christmas party with Santa hats

Parenting2.0: Self-growth, Enjoyment and Guidance

In contrast with the traditional strict parenting of the past, with growing economies, families in ASEAN today are no longer just for investing in and as insurance for later in life, but more about growth and pure enjoyment.

The most important benefits of having children/ becoming a parent

Ranking (Top 1 of MA)	ASEAN Total
1st The joy of parenting	10.9%
2nd Personal growth and maturity	9.7%
3rd Make my family "complete"	9.6%
4th Create bond between me and my child	7.9%
5th To follow the teaching of religion/god's will	7.3%

Me in We

As their economies have grown, individualism increased and respect for individuality grown, ASEAN *sei-katsu-sha* have come to respect each other's privacy and autonomy more than ever before. With this shift, today's ASEAN parents are more willing to teach their kids to think critically for themselves and allow them more freedom. This also fulfills the wishes the parent generation had but could not attain.

"Even though I live with my Mom, I have my own condo in the city that serves both as my office and a place to maintain a good relationship distance when I have had a fight with her."
—Solo Millennial, Thailand

Enduring Values

Family: The most reliable assurance financially and emotionally

Family is like true wealth in the ASEAN region, where unexpected challenges are prevalent. The family unit serves as a reliable source of financial stability, love and happiness. It is an unwavering assurance that family members can always rely on each other, now and in the future.

Family person = Good person: Family relationships as social passport

ASEAN individuals take great pride in their family traditions and values, treating them as a foundation for good morality in life, and something they want to pass down to the next generation

This tendency influences them to believe that individuals from similar supportive family backgrounds are more likely to possess good character and be embraced by society.

Things to pass down to next generation

Ranking (Top 1 of Top 3 choice)		
1st	Family values and traditions	21.5%
2nd	Religious practices	21.2%
3rd	Educational knowledge	18.6%
4th	Cultural and ethical practices	17.4%
5th	Family wealth	7.5%

Someone who has good relationships with family is more likely to be a "good person"
69.2%
(A vs. B selection)

To ensure a stable life, it's better to invest time energy into my family
58.1%
(A vs. B selection)

The most important benefit(s) of having your own family

Ranking (Top 1 of Top 3 choice)		
1st	To have financial stability	13.5%
2nd	To enjoy life/togetherness	10.8%
3rd	To feel happiness	10.7%

Flexible power balance for family harmony

In ASEAN, the majority feel that the dynamic in the family is one of equality. This is not achieved through a fixed 50/50 split, but with flexibility, where each member can contribute what they are good at and be respected for it. This is the way for them to keep harmony in the family.

Prioritizing family harmony over personal desires is essential to a happy family
73.0%
(A vs. B selection)

"As a woman, I believe my roles in the house and at work are different. That is an important attitude which maintains harmony in the family and also in society."
—Conventional Millennial, Thailand

Data: ASEAN Total

Why are They Mixing Old And New?

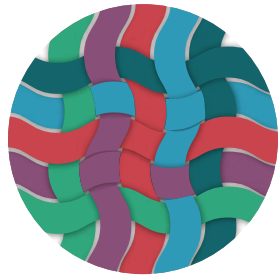
ASEAN families: Mixing traditional and modern values, creating continuity through relevancy.

In today's world, social media connectivity exposes individuals to diverse family values worldwide, while increased GDP provides people with more income. This fosters a shift in family focus from mere survival to creative self-expression within family structures.

What's intriguing is that ASEAN families don't fully embrace new paradigms. Instead, they choose to revitalize traditional teachings and values to make them more practical and relevant to modern lifestyles. This is because they believe that family traditions are the foundation for moral development and life guidance, which will be crucial to young people and the next generation for living harmoniously in ASEAN society.

Big Findings

The Weaving Family



As the world continues to evolve, so does the ASEAN family. Today, these families are no longer characterized by the father-mother-child template, but by a unique family dynamic we call “The Weaving Family.”

It embodies a new familial dynamic in ASEAN that intertwines tradition and modernity, young and old, male and female, to create a unique and resilient family style. Also, the individual threads of each member and each role in the family are respected, creating unique family patterns. This woven bond wraps and protects family members in a condensed but cherished embrace against an unstable ASEAN society.

2014

The Connected Family

With power of technology, *sei-katsu-sha* connect with family members, creating a virtual extended family

Emergence of power of technology

Trigger

Big families striving for collective enjoyment

Family Design

Want to showcase loving in always-on connected families

Ideal Perception of Family

Constant connection through social media

How

2024

The Weaving Family

With the intention of creating resilient families, *sei-katsu-sha* design their own unique family styles by mixing old and new value

Economic growth, societal uncertainty e.g., COVID-19

Small families exploring creativity with harmony

Want to showcase unique family embodying own family value

Remixing old tradition and new value

Marketing Implication

Increase occasions to appreciate & celebrate family

The Family Day



Father's Day, Mother's Day, Children's Day, New marketing opportunities. Celebrate the family days.

Create opportunities to showcase family creativity through traditions

Trad-du-tainment

Tradition + Education + Family Entertainment



Turn brand experiences into educational experiences through learning traditions.

Facilitate family harmony in decision making through data analytics

Family Data-Based Recommendations

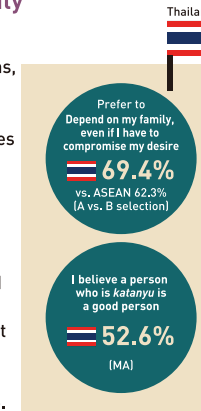


Open access family data: Purchasing preference/search data to make the perfect product/service recommendations for a family.

6 Nations Key Findings

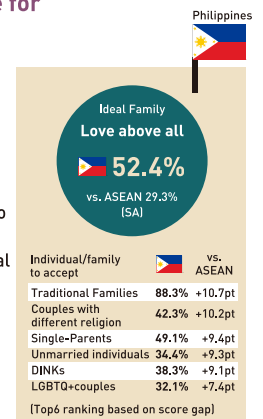
Family dynamic of mutual reliance driven by respect for seniority (*katanyu*) and togetherness

Rooted in history and cultural traditions, Thai families emphasize strength through interdependence and compromise. Due to various instabilities in society, tight family support may be more important and beneficial than individual wishes and desires. This ethos is reinforced by the cycle of *katanyu* (gratitude), where senior members offer care and guidance, and the younger generation reciprocates with utmost respect and a commitment to care for them in the future—an act appreciated by society, deeming the individual as possessing a good nature.



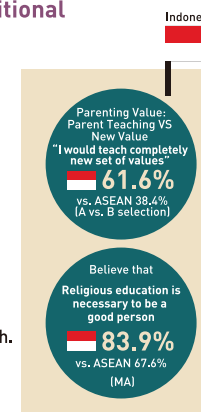
Love is the guiding principle for accepting family diversity

Family is where love flourishes. Catholicism promulgates love as the greatest testament, thereby making children symbols of the coming together of love, as well as the assurance of aid in an unpredictable future. The spirit of mutual help is also evident in the high level of acceptance of various types of families—traditional families, single parents, LGBTQ+ families, religiously diverse families and DINKs—all loving their neighbors as if they are their own.



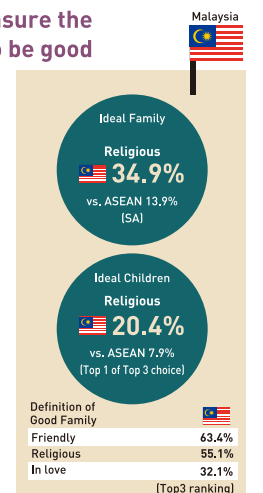
Progressive parenting, traditional moral guidelines

Religion has served as their guiding principle, influencing their decision to establish a family and how they shape the upbringing of their children. For parenting style, they are now open to teaching the next generation new values alongside religion and existing values. With such progressive parenting styles, they expect their children to not only adhere to religion, but also to live out the virtues and moral values associated with their faith.



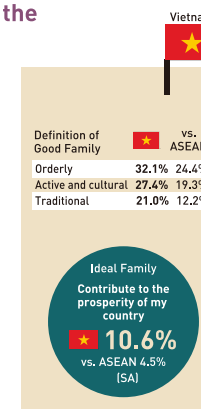
Passing down faith and tradition is part of “family legacy” to ensure the next generation grows up to be good

Family is the embodiment and extension of a person's identity. Therefore, having a good family is a mark of a good person. In addition, religious faith is considered a pride and guiding light of good in Malaysia, as it is a country with a melting pot of different ethnicities and cultures. Malaysian families want to make sure what differentiates them—as a family and as a religion—will continue to live on so that the next generation grows up to become good people.



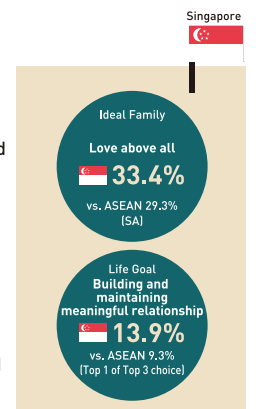
Structural family order is the base for individuals' exploration and the country's prosperity

As Vietnam grows rapidly as a country, the surest guide for their future is an orderly family with a family leader (senior) at the center. When the roles of family members are defined, individuals are able to function efficiently, and freely explore their own path, contributing not only to the growth of the individual, but also the prosperity of the country.



Thriving in a competitive society through family alliances

Family is an essential “alliance” to thrive in Singaporean society. While there's extensive support from the government, society is competitive and strongly values academic qualifications. Therefore, the pure love and bonds of family are an essential emotional safety net. Moreover, the definition of “success” for Singaporeans goes beyond owning assets/wealth to include maintaining meaningful relationships within the family while continuously growing and improving oneself.



Epilogue



As a Japanese person working in Thailand, ASEAN *sei-katsu-sha* always give me fresh perspectives and deep inspiration. They cherish connections with family and others, believing in a bright future while living fully in the present. While embracing new concepts and technologies with flexibility, their underlying traditional values remain unwavering. The more I learn about the cultural, historical, and religious factors woven into the fabric of their upbringing, the more compelled I am to study the people of ASEAN further, to offer better insights and suggestions! I believe that the 10 HILL ASEAN research themes to date can each pique the curiosity of ASEAN *sei-katsu-sha*. Through our activities over the past decade, I am honored to see that the *sei-katsu-sha* Insight philosophy cherished by the Hakuodo Group also embraced by so many clients and colleagues in ASEAN. How can we make the people happy? What questions should we ask society? What ideas should we propose for people’s happiness? Such people-centric thinking underpins all Hakuodo activities in Japan, ASEAN and globally. At HILL ASEAN, it serves as the driving force propelling our research into ASEAN *sei-katsu-sha* forward.

We express our gratitude to all clients who have shown interest in our studies and marketing recommendations and applied them to their work. We extend our gratitude to the Hakuodo Group for their understanding of the activities of HILL ASEAN and for assigning talented planners to conduct country-specific research. To all the planners who have passionately engaged in *sei-katsu-sha* research in ASEAN over the past decade, HILL ASEAN could not have reached this point without your dedication and curiosity. Let’s continue this exciting journey of exploration together for the bright future of ASEAN.

Yuko Ito, Managing Director, HILL ASEAN



As a longstanding member of HILL ASEAN, I find our core strength lies in our profound curiosity about people. It’s not just about observing their behaviors (what they do), but also about delving deep into their desires and motivations (why they do what they do). To get to that point, we consistently ask the questions others may overlook to shed new light on familiar perspectives. This deep diving into the core of human desires allows marketers like us to offer solutions that truly resonate and bring happiness. This ability to connect, which opens the door to positive change for people through our studies, is what sets us apart. It’s a source of immense pride and joy for me to be a part of HILL ASEAN.

Prompohn Supataravanich (Dee), Associate Director, HILL ASEAN



Exploring the diverse life stories of ASEAN *sei-katsu-sha* always fills me with profound joy and inspiration. Each encounter, a tapestry of hopes, love, and happiness, serves as the wellspring of our exploration and understanding of the evolving lifestyle dynamics among ASEAN *sei-katsu-sha*.

Our exciting journey to discover ASEAN *sei-katsu-sha* is dedicated to making their lives happy, as well as facilitating meaningful engagement between them and our clients. We believe this humanistic approach to marketing—the *sei-katsu-sha* Insight philosophy—holds the power to transcend boundaries of region and time. As we look ahead, I strongly believe that the philosophy will continue to flourish and inspire us for another decade, not only within ASEAN but across the globe.

May the HILL ASEAN and *sei-katsu-sha* Insight philosophy thrive and illuminate pathways to a brighter future for ASEAN *sei-katsu-sha*!

Tomoka Takada, Regional Strategic Planning Director, HILL ASEAN



As a new member of HILL ASEAN, I am in the process of learning daily about the differences among *sei-katsu-sha* across the ASEAN countries. Contributing to our clients and society is important and exciting for me as a marketer, but above all, I am honored to be able to share Hakuodo’s philosophy with team members from different countries, to have deep discussions toward shared goals, and to create good ideas together. We will continue to do our utmost to contribute to the expansion of HILL ASEAN.

Haruna Yaku, Regional Strategic Planning Director, HILL ASEAN

Survey, research, and presentation

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