



Hakuhodo Institute of Life and Living ASEAN holds ASEAN *Sei-katsu-sha* Forum 2017

ASEAN MILLENNIALS: One Size Fits All? A Generation Gap in ASEAN unveiled
A comparative study of 1,800 young people born in the 1980s and 1990s in 7 ASEAN countries

Tokyo—February 21, 2017—Hakuhodo Institute of Life and Living ASEAN (“HILL ASEAN”), a think tank established in Thailand in March 2014 by Japan’s second largest advertising company, Hakuhodo Inc. (Minato-ku, Tokyo; Hirokazu Toda, President & CEO), today in Bangkok announced findings from its latest research into ASEAN *sei-katsu-sha*¹. Entitled “ASEAN MILLENNIALS: One Size Fits All? A Generation Gap in ASEAN,” the presentation, HILL ASEAN’s third, unveiled differences in attitudes to life and work, interactions with digital technology, and more between the Millennial generations.

The presentation was a great success, with over 300 marketing staffers and managers from ASEAN, Thai and Japanese companies, Thai media people, and others gathering for the occasion.

Millennials, or those born in the 1980s and 1990s, have captured the attention of the marketing industry the world over. With their fresh values and high degree of fluency in digital technology, Millennials are very different from previous generations and notoriously difficult to reach with traditional marketing approaches.

Millennials are especially prominent in ASEAN countries, whose populations have a high percentage of young people. However, given the dramatic social and economic shifts that have taken place in these countries in recent years, it is difficult to define such a broad age group as a single entity. Instead, for this study HILL ASEAN divided the generation up into those born in the 1980s and those born in the 1990s. Analysis of research into the attitudes of each group revealed gaps between them in the way they live and work, their use of digital technology, their shopping behavior and more.

¹ *Sei-katsu-sha* are more than simply consumers, just as people’s lives and lifestyles include more than just shopping. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers’ lives.



For details on the presentation, please visit the HILL ASEAN website at:
<http://www.hillasean.com/>



Hakuhodo Institute of Life and Living ASEAN will continue to conduct *sei-katsu-sha* research, observing *sei-katsu-sha* from unique viewpoints and offering insights from fresh perspectives.

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Outline of the Generation Gap Survey

Survey method: Internet survey

Respondents: Males and females born in the 1970s, 1980s and 1990s

Survey area: Singapore, Kuala Lumpur (Malaysia), Bangkok (Thailand), Jakarta (Indonesia), Ho Chi Minh City (Vietnam), Manila (Philippines)

Sample size: 300 samples per city; total of 1,800 samples

Allocation: In accordance with the demographic composition of each country

Survey implementation: Tokyo Survey Research Inc.

Survey period: September 2016

About Hakuodo Institute of Life and Living ASEAN

Established in 2014, Hakuodo Institute of Life and Living ASEAN is the Hakuodo Group's *sei-katsu-sha* think tank in the ASEAN region. Leveraging *sei-katsu-sha* research know-how accumulated in the thirty-plus years since launching the Hakuodo Institute of Life and Living in Japan in 1981, the Institute supports companies' marketing activities in the ASEAN region, while developing local insights and making proposals on future ways of living in the region.

Institute Director: Goro Hokari

Location: Bangkok, Thailand

Research & other activities:

- ASEAN Fixed Point Survey, a fixed-point survey of ASEAN *sei-katsu-sha* (every second year)
- Research and analysis from local ASEAN viewpoints
- Forums in ASEAN countries

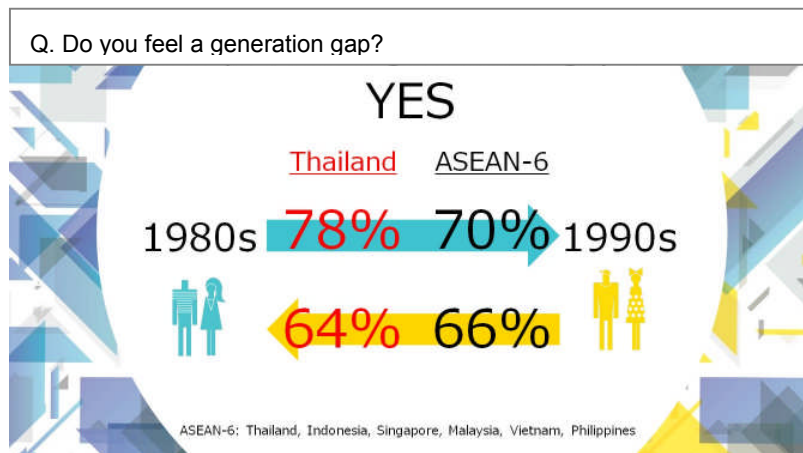


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Reference:

Perception of a generation gap between ASEAN Millennials

When we asked Millennials born in the 1980s and 1990s in six ASEAN countries (Thailand, Indonesia, Singapore, Malaysia, Vietnam, Philippines (“ASEAN-6”)) whether they perceived a generation gap, the scores for the 1980s cohort who perceive a gap between the 1980s- and 1990s-born were 70% across the ASEAN-6 and 78% in Thailand. The scores for those born in the 1990s toward those born in the 1980s were 66% across the ASEAN-6 and 64% for Thailand. One reason for the high proportion of Thais born in the 1980s who perceive a generation gap between themselves and those born in the 1990s may be the size of the gap in the degree to which the advent of Facebook and smartphones impacted the lifestyles of the 1980s- and 1990s-born.



ASEAN Millennials: Affected by different historical events

When we asked what historical events had most impacted their lifestyles, those born in the 1980s cited the Asian Financial Crisis, which occurred in 1998 when they were in their teens. For the 1990s-born, however, the arrival of Facebook and smartphones seems to have had a bigger impact.

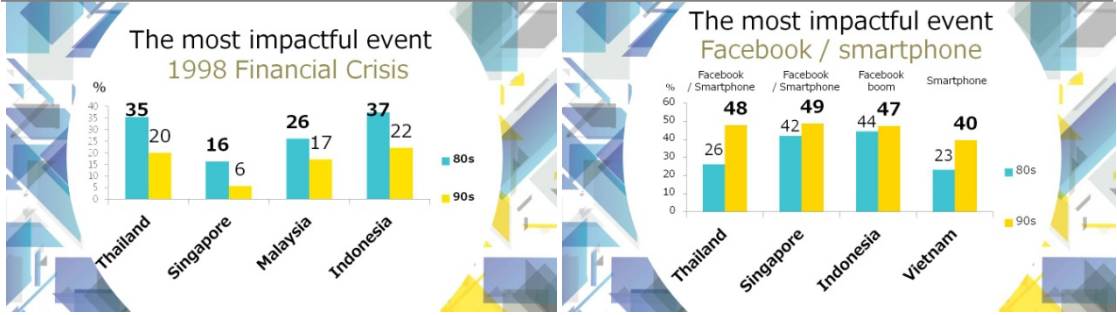
Scores for the Asian Financial Crisis were high for both the 1980s- and the 1990s-born in Indonesia and Thailand, countries whose economies took massive hits during the Crisis. With their parents losing their jobs, leaving their families behind to seek work elsewhere or moving their households, the impact of the crisis was personal.



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In Vietnam and Thailand, there is a large generation gap in the impact of the advent of Facebook and smartphones. The impact on those born in the 1990s, who from a young age quickly built communities on Facebook, etc. via smartphone, is seemingly stronger than the impact on those born in the 1980s, who were older when they got their first smartphones.

Q. Which historical event that you have heard of most impacted your lifestyle (either positively or negatively)? Select the 3 historical events which most impacted your lifestyle.



■ About Hakuhold Inc.

Founded in 1895, Hakuhold Inc. is an integrated advertising and communication agency headquartered in Japan. It is the core agency of Hakuhold DY Group, the world's seventh largest agency company according to *Advertising Age's* "Agency Report 2016." Hakuhold has offices in 17 countries and regions, and over 3,000 employees working in Japan and over 2,500 overseas. Hakuhold is strengthening its structure in emerging countries, particularly those in Asia, as it prepares to further expand its business across the region.

Sei-katsu-sha insight is the foundation for Hakuhold's thinking, planning, and brand building. It reminds us that consumers are more than shoppers performing an economic function. They have heartbeats. They are individuals with distinct lifestyles. Hakuhold introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

Renowned for its creativity, Hakuhold has twice won the Grand Prix at Cannes Lions International Festival of Creativity, and was the only agency headquartered in Asia to be awarded a Special Lion commemorating Cannes Lions' 50th anniversary in 2003.

To learn more, visit: www.hakuhold.jp



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