

Hakuhodo Institute of Life and Living ASEAN presents ASEAN *Sei-katsu-sha* Studies 2020 Dubs the approx. 80% of ASEANs that live conscious lifestyles “Consciouslites”

Tokyo—March 5, 2020—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. researched and studied ASEAN *sei-katsu-sha*’s attitudes and behavior in ASEAN *Sei-katsu-sha* Studies 2020. The topic this time was “The Rise of Conscious ASEANs: Why should you CARE?”. The following is a summary of the results and hints for marketing.

Quantitative research, home visit surveys and interviews with key opinion leaders conducted in six ASEAN countries*¹ painted a picture of ASEAN *sei-katsu-sha* that actively incorporate Conscious Lifestyles*² in their daily lives. HILL ASEAN dubbed this rapidly increasing cohort of conscious ASEAN *sei-katsu-sha* “The Consciouslites” and analyzed their lifestyles and shopping attitudes and behaviors. Findings from this research are available on the HILL ASEAN website. This report covers some of the findings from this analysis.

*¹ Countries studied: Thailand, Singapore, Indonesia, Malaysia, Vietnam, Philippines

*² **Conscious Lifestyles:**

Lifestyles and consumer behavior that take into consideration other people, the environment and society. An approach to life that considers whether actions have a positive impact on oneself, other people and society and in which products and services, companies and brands are consciously selected and purchased

The Consciouslites

Sei-katsu-sha who live Conscious Lifestyles, seeking to have a positive impact on environmental and social issues through their everyday actions and brand choices

■ Key points from the findings: The attitudes and behavior of conscious ASEAN *sei-katsu-sha*

(1) Key findings from quantitative research

Conscious Lifestyles awareness and actual action

- Around 90% of ASEAN people are aware of the term “Conscious Lifestyle.” Around 80% actually incorporate conscious actions into their everyday lives

Conscious action level (Base: Conscious ASEANs)

- Among ASEAN Consciouslites, 86% report that they actively incorporate conscious actions into their everyday lives (Do it regardless of what others do/think + Do it and advocate it to others)

Considerations when selecting brands (Base: Conscious ASEANs)

- Over 80% of ASEAN Consciouslites attach importance to socially conscious brands, with 85% saying they want more brands to advocate Conscious Lifestyles and have a positive impact on society, and 82% saying they would switch to another brand based on whether it supports good causes

Willingness to pay extra for conscious products (Base: Conscious ASEANs)

- 81% of ASEAN Consciouslites say they are willing to pay a premium for Conscious Lifestyle-related products

(2) Key findings from qualitative research

Reasons for starting Conscious Lifestyles: Near and Dear—For those close to them

- Environmental and social issues (flooding, garbage problem, marine pollution, poverty, etc.) are more pressing for ASEAN *sei-katsu-sha* than *sei-katsu-sha* in other regions. Due to this, there is a tendency toward taking action not for “the world” or “the people affected,” but for people nearer and dearer to themselves, such as “Myself and my family” and “My country and region”

How they incorporate Conscious Lifestyle actions: Good Vibes Only—Feeling good about it

- Generally positive and optimistic, ASEAN *sei-katsu-sha* like fun and easy endeavors and tend to avoid going to extremes with consciousness. To keep their consciousness efforts up, they do as much as feels comfortable, with some leeway, without putting undue pressure on themselves

How they spread Conscious Lifestyle actions: #InstaGOOD—Insta-ready conscious actions

- Enthusiastically sharing information about themselves on social media is another characteristic of ASEAN *sei-katsu-sha*. Many also share their conscious activities for uncomplicated reasons like “It’s fun,” “It’s trendy,” and “Because it will look good on social media”

■ Traits of Consciouslites seen in the research findings

Reasons for conscious efforts	For their country or region, for “ Ourselves (myself, my family) ”
Connection with environmental/social issues	“ Involved party ” living right in the midst of the issues
Attitude	Cheerful, thoughtful toward others
Behavior	Fun-loving, concerned about trendiness and how things will look on social media too

The existence of large numbers of Consciouslites in ASEAN is deeply connected to awareness of environmental and social issues as real problems that affect the lives of ASEANs themselves and the people they know. HILL ASEAN’s research showed that Conscious Lifestyles impact the consumer behavior and brand selections of ASEAN *sei-katsu-sha* and have the power to greatly change the shape of companies’ marketing activities in the near future.

HILL ASEAN will continue to support the marketing activities of companies in ASEAN through research into the perceptions and behavior of ASEAN *sei-katsu-sha*.

See the website for further details

<http://hillasean.com>

A special webpage has been created for this research on the HILL ASEAN website. It contains detailed survey findings, commentary on the research content, hints for marketing, and other information. Please refer to it in addition to this press release.

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Corporate Public Relations Division
koho.mail@hakuodo.co.jp

Reference data: Conscious ASEANs Today

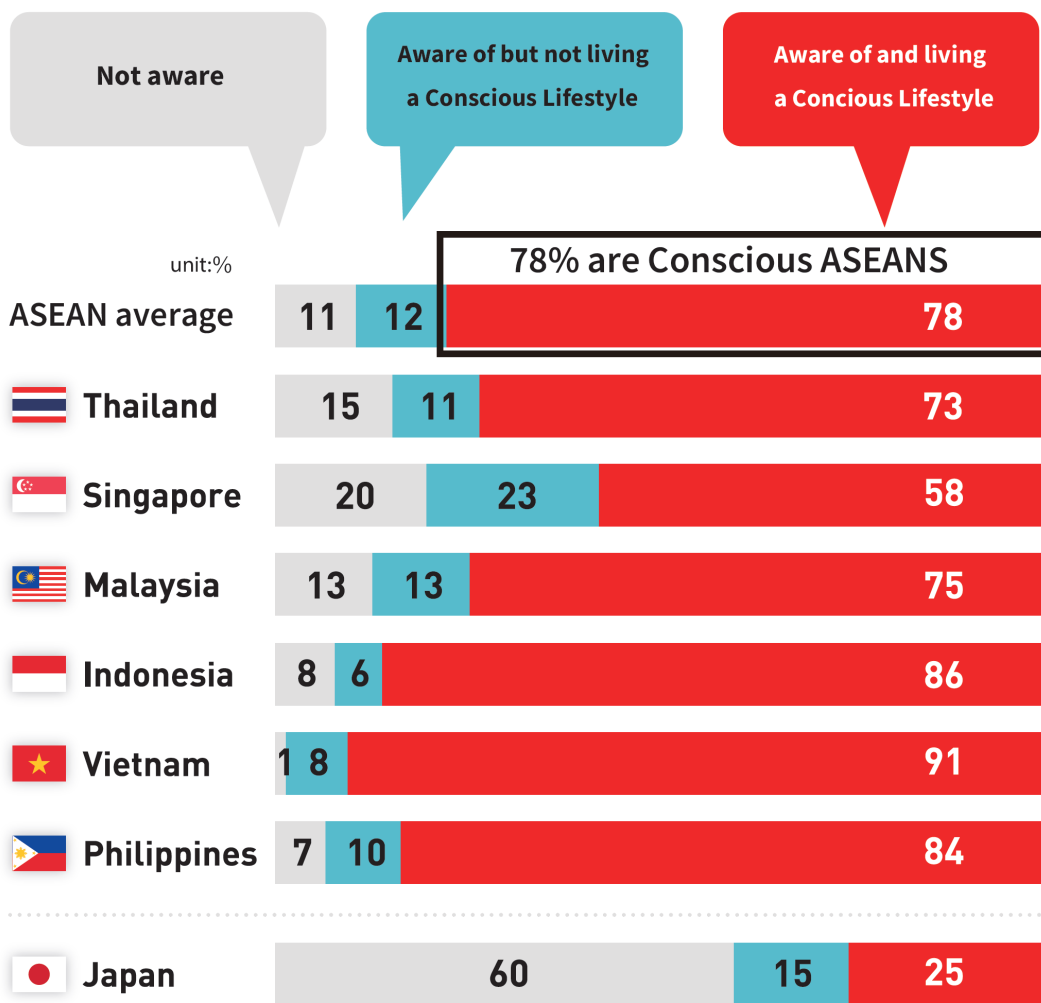
Conscious Lifestyle awareness and actual action

- Around 90% of ASEAN people are aware of the term “Conscious Lifestyle.” Around 80% actually incorporate conscious actions into their everyday lives
- Conversely, awareness is around 40% among Japanese *sei-katsu-sha*. Around 25% actually incorporate conscious actions into their daily lives, some 55 points lower than in ASEAN. In Japan, behaviors such as separating waste and recycling are already ingrained habits, so it is likely few see these actions as “conscious”

Conscious Lifestyle

Lifestyles and consumer behavior that take into consideration other people, the environment and society. An approach to life that considers whether actions have a positive impact on oneself, other people and society and in which products and services, companies and brands are consciously selected and purchased

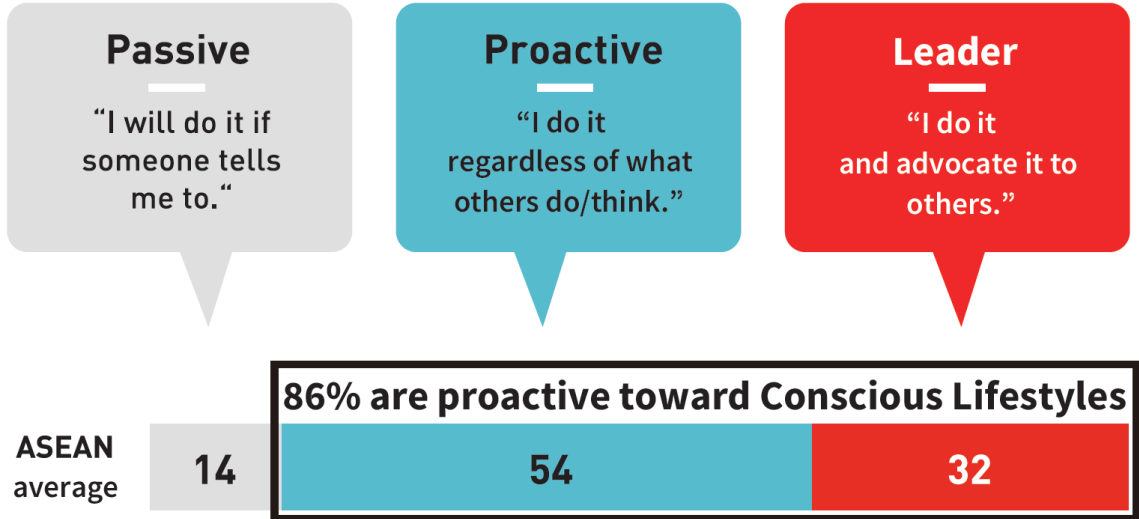
Q. What is your stance on “Conscious Lifestyles”?



Conscious action level (Base: Conscious ASEANs)

- Among ASEAN Consciouslites, 86% report that they actively incorporate conscious actions into their everyday lives (Do it regardless of what others do/think + Do it and advocate it to others)
- In Japan, 72% say they actively take conscious actions, 14 points lower than the figure for ASEAN

Q. How do you describe your attitude to Conscious Lifestyles?



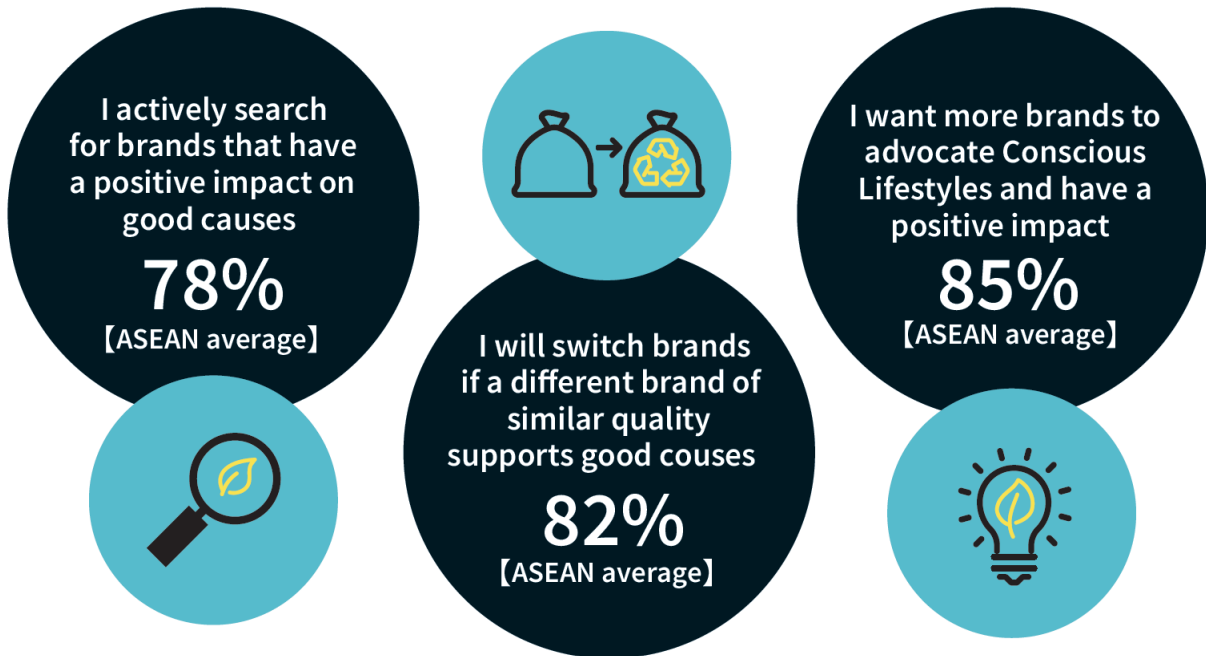
	unit:%	Passive	Proactive	Leader
Thailand		14	43	43
Singapore		21	65	14
Malaysia		21	55	24
Indonesia		8	64	29
Vietnam		16	41	44
Philippines		6	61	33
Japan		29	61	11

Base: Conscious ASEANs (Respondents who answered "I am aware of and living a Conscious Lifestyle")

Considerations when selecting brands (Base: Conscious ASEANs)

“Has a good impact on society” is an important criterion when choosing a brand

- Over 80% of ASEAN Consciouslites attach importance to socially conscious brands, with 85% saying they want more brands to advocate Conscious Lifestyles and have a positive impact on society, and 82% saying they would switch to another brand based on whether it supports good causes



Q. What points do you consider when choosing a brand?

“Environmental impact” ranks third

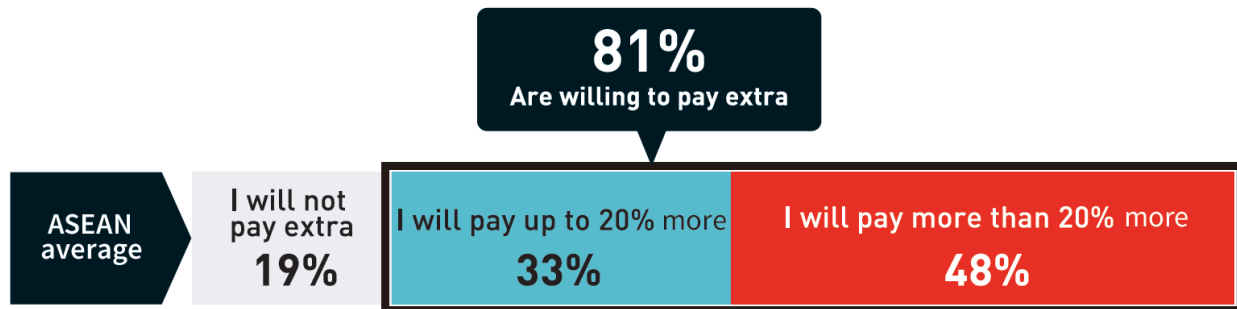
ASEAN average(%)	Function	Price	Environmental impact	Design	Brand image	Brand/ Corporate objectives	Social responsibility (CSR)	Newness	None applies
Household Product	56	46	38	33	26	21	20	18	1
Food/Beverage	30	68	38	12	28	18	21	15	2
Skincare/Personal Care/Cosmetics	46	46	39	20	37	26	22	19	2
Automobile	43	50	40	38	33	24	22	25	2
Electric Appliance	53	49	36	35	36	24	20	24	1

Base: Conscious ASEANs (Respondents who answered “I am aware of and living a Conscious Lifestyle”)

Willingness to pay extra for conscious products (Base: Conscious ASEANs)
Consciouslites would not hesitate to pay more for conscious products

- 81% of ASEAN Consciouslites said they were willing to pay a premium for Conscious Lifestyle-related products
- With 77% in Japan reporting that they would pay extra, the research indicates that nearly 80% in ASEAN and Japan would have no problem paying more for conscious products

Q. “How much more are you willing to pay a premium to purchase Conscious Lifestyle products?”



*Average score for Food & Beverage, Household Product, Skincare/Personal care/Cosmetics, Automobile, Electric Appliance

Unit : %	I will not pay extra	Up to 20% more	More than 20% more
Thailand	16	31	53
Singapore	23	32	45
Malaysia	19	30	52
Indonesia	26	31	43
Vietnam	16	36	48
Phillipines	16	35	49
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Japan	23	33	44

*Base: Conscious ASEANs (Respondents who answered “I am aware of and living a Conscious Lifestyle”)

Outline of quantitative research

Survey method	Internet survey
Territory	Thailand, Malaysia, Indonesia, Vietnam, Singapore, Philippines, Japan
Respondents	4,500 males and females aged 20–49 (900 in Thailand and 600 each in the other countries)
Survey period	August–September 2019

Outline of qualitative research

Survey method	Home visit study of conscious ASEAN <i>sei-katsu-sha</i>
Territory	Thailand, Malaysia, Indonesia, Vietnam, Singapore, Philippines
Respondents	24 samples (4 in each country)
Survey period	August–September 2019

Survey method	Interview study of key opinion leaders
Territory	Thailand, Malaysia, Indonesia, Vietnam, Singapore, Philippines
Respondents	Influencers that undertake activities for environmental and social issues and post about them on social media 12 samples (2 in each country)
Survey period	August–September 2019

■ About Hakuodo Institute of Life and Living ASEAN

Established as an in-house think tank studying *sei-katsu-sha* in 2014, HILL ASEAN was incorporated in Thailand in March 2017. The Institute supports clients' marketing activities in ASEAN through insights into and proposals for ASEAN *sei-katsu-sha*.

Name	Hakuodo Institute of Life and Living ASEAN
Institute Director	Devi Attamimi
Location	Bangkok, Thailand
Research & other activities	Research and analysis conducted from the local perspectives of each ASEAN nation and Forums held in ASEAN countries

Further details of survey findings, commentary on the research content, hints for marketing, and other information can be found on the Hakuodo Institute of Life and Living ASEAN website: <http://hillasean.com/>

■ About Hakuodo

Founded in 1895, Hakuodo is an integrated advertising and communication agency headquartered in Japan. The core agency of the Hakuodo DY Group, Hakuodo is the world's 4th largest advertising agency according to Advertising Age's "Agency Report 2019."

The Hakuodo Group has offices in 20 countries and regions, and over 10,000 specialists working in Japan and abroad. Hakuodo 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 Hakuodo'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. Hakuodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

Renowned for its creativity, Hakuodo 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.hakuodo-global.com