

Hakuhodo Institute of Life and Living ASEAN presents ASEAN *Sei-katsu-sha* Studies 2021

## Deep analysis of SynergiZers, the Gen Zers that make up around 24% of the ASEAN population

Tokyo—April 8, 2021—Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) held ASEAN SEI-KATSU-SHA FORUM 2021, announcing findings from surveys and research into the attitudes and behavior of ASEAN *sei-katsu-sha*—Hakuhodo's term for the holistic person—and hints for marketing. The topic was “Now you Z me: Debunking myths about ASEAN's Generation Z.”

In ASEAN, “Generation Z” refers to those born 1997–2012 and ranging in age from 9 to 24 in 2021 (Note 1). Gen Zers make up a relatively large proportion of the ASEAN's population. Estimated at 24% of the population, it is a generation that has an impact on society and the economy.

Findings from quantitative and qualitative surveys in six ASEAN countries (Note 2) uncovered that as ASEAN's Gen Z encounters information and news from around the world via their smartphones and dispassionately take a bird's-eye view of the words and deeds of previous generations, they **want to solve the social challenges caused by previous generations by valuing themselves, their families and others around them equally and harmonizing with them while recognizing each other's differences.**

HILL ASEAN has dubbed these Gen Zers who value harmony and synergy **SynergiZers**, and analyzed their personal connections, life values and media attitudes and behaviors. Findings from this research are available on the HILL ASEAN website. This report covers some of the findings.

Note 1: The generations mentioned in this study follow Pew Research Center definitions

Note 2: Countries studied: Thailand, Singapore, Indonesia, Malaysia, Vietnam, Philippines

### The SynergiZers

A generation that creates synergies within harmony. Balancing various aspects of themselves (work, dreams, passions, mental health, economic stability, among others), they create synergies between themselves, their families and society in the hopes of influencing the world and people around them in a positive way.

### ■ SynergiZer characteristics

#### Personal connections

- Generally, ASEAN Gen Zers were raised with casual relationships with their parents, have a lot of freedom in their lives, and were encouraged to have their own opinions. 46% agreed with the statement “I was encouraged to question things, form arguments, and have a point of view.”

- At the same time, 63% agreed that they were “Encouraged to follow traditions and norms set by others.” They emphasize following traditional values to maintain good relations with society and those around them.
- 67% agreed that “Success is making family and friends proud.” They strongly retain the ASEAN family-first ethos. It is clear they value harmony with those around them a great deal.

### **Life values**

- 86% agreed with each of the statements “Life is about fulfilling responsibility” and “Life is about self-love.” They value both themselves and their families. They think those around them can’t be happy if they are not happy.
- 74% agreed that “Success is being happy with who I am despite what others say,” indicating that high positions and making money are not the only “proof of success” to them. In terms of their careers, too, one characteristic of this generation is that many can be said to emphasize their own satisfaction and seek to gradually advance up the ladder by setting achievable goals.

### **Social media**

- They understand the rules (how to behave) on the various social media platforms, and keep distinct identities for each in line with these. But none of these identities is false; they’re all their real selves. 82% agreed with the statement “When posting on social media, I’m very conscious about my character,” and 68% agreed with “I want to show my natural self on social media.”
- Compared to older generations, they prefer posting in formats that can be enjoyed intuitively and sensorially, like Stories (Note 3) and memes (Note 4). The top three content they prefer to view on social media were 1. Text and photos, 60% (Generation Y: 65%); 2. Videos, 52% (Generation Y: 49%); and 3. Stories, 46% (Generation Y: 41%).

Note 3: Short video content that disappears in 24 hours. Available on Instagram and Facebook

Note 4: Photos and videos with strongly topical comments

### **Interest in social issues**

In interviews that were conducted in conjunction with our quantitative survey, while some said they had concerns about the future, many said they wanted to work on social issues.

Gen Zers live in a society with countless issues caused by previous generations, including economic and political concerns, inequality, human rights issues and COVID-19, to name a few, but it appears that they are keen to solve these social issues together with their friends. (See “Desire to solve social issues” in the reference data on p. 6 for further details)

### **Brands**

- 85% agreed they were Willing to pay 10% more if a brand contributes to social issues in the community. They have high expectations of brands and look to them to fulfill many roles.

■ **Characteristics of different generations in ASEAN**

	Generation X (Born 1965–1980)	Generation Y (Born 1981–1996)	Generation Z (Born 1997–2012)
What they hold dear (Life values)	Safety and stability	Freedom and flexibility	<b>Harmony and self-worth</b>
Who they hold dear (Relationships)	Family	Self	<b>Close circle of family and friends</b>
What makes them happy	Certainty in their lives	Expressing themselves	<b>Fulfillment of their own and others' needs</b>

Note: Characteristics of Generation X and Generation Y excerpted from Hakuodo Institute of Life and Living ASEAN's *ASEAN Millennials: One Size Fits All?*, 2017

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*. Findings of this study, an explanation of the research content and hints for marketing going forward can be found on a dedicated page on the Hakuodo Institute of Life and Living ASEAN website: <http://hillasean.com/>

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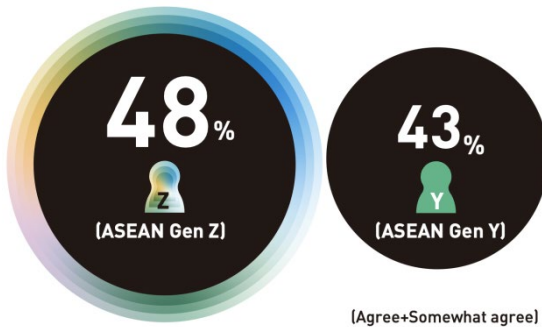
Media contacts:  
Corporate Public Relations Division  
[koho.mail@hakuodo.co.jp](mailto:koho.mail@hakuodo.co.jp)

## Reference data

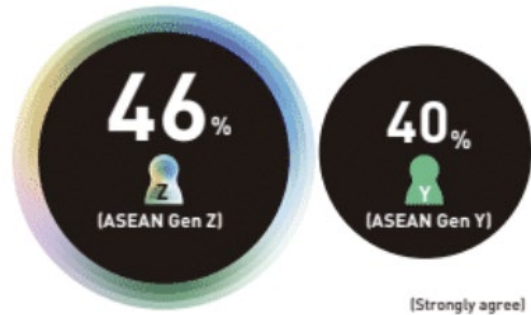
### Relationships between parents and children in ASEAN

- Compared to previous generations, relationships between ASEAN Gen Zers and their parents are more casual. 48% agreed (Agree+Somewhat agree) with the statement “My relationship with my parents is casual and friend-like.” Parents of Gen Zers were brought up with strict hierarchical relationships and education, so their approach to education may result from their desire not to put their own children through the same thing.
- 46% of ASEAN Gen Zers agreed with the statement “I was encouraged to question things, form arguments, and have a point of view,” another trend more pronounced among them than Generation Y. Thanks to their parents’ approach to education and the fact they encounter information every day on the internet and have many opportunities to express their opinions on social media, Gen Zers readily express their thoughts on social issues and topical matters in the world. This is something we witnessed in our interviews, too.

Q. Relationship with my parents is casual and friend-like



Q. Encouraged to question things, form arguments, and have a point of view



### Inheriting ASEAN values

- As can be seen in the fact that 63% of Gen Zers agreed (Agree+Somewhat agree) that they were “Encouraged to follow traditions and norms set by others,” while being taught to live freely by their parents, they cherish typical ASEAN values.
- 67% responded that they define their own success as “Making family and friends proud.” Additionally, 61% agreed that “Happiness is being accepted by many people,” and 70% agreed that “Happiness is having and connecting with lots of friends/people that I care about.” It’s not possible to discuss ASEAN Gen Zers without mentioning their harmony and connections with their families and others around them.
- The tendency to place importance on family and community is a distinctly ASEAN characteristic. This importance has been inherited Gen Zers without being lessened with time.

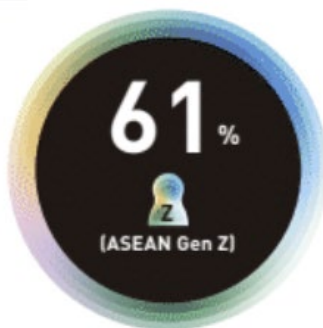
Q. Encouraged to follow traditions and norms set by others



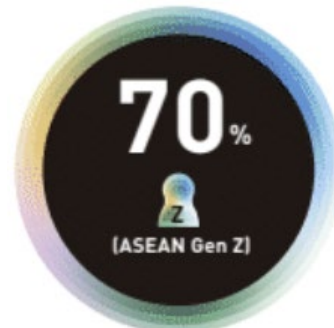
Q. My definition of success: Success is making family and friends proud



Q. My definition of happiness: Happiness is being accepted by many people



Q. My definition of happiness: Happiness is having and connecting with lots of friends/people that I care about



### The balance between responsibility to others and self-love

- As can be seen from the fact that they agreed equally (Agree+Somewhat agree) with the statements “Life is about fulfilling responsibility” and “Life is about self-love,” giving both scores of 86%, ASEAN Gen Zers value themselves and others to the same degree.



### Happiness and success for ASEAN Gen Zers

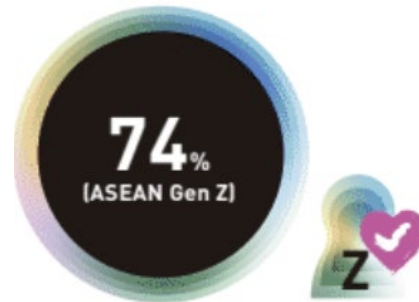
- 91% of ASEAN Gen Zers agreed (Agree+Somewhat agree) that “Life is about acquiring happiness.” With mental health becoming a social issue in ASEAN and news about famous celebrities committing suicide appearing on social media, Gen Zers also prioritize their peace of mind.

- Often seeing the gap between the lives of the famous and ordinary people on social media, ASEAN Gen Zers already understand the position and money don't necessarily equate with success. With 74% agreeing that "Success is being happy with who I am, despite what others say," sustained happiness means success to ASEAN Gen Zers. (In comparison, happiness means accumulating success to Generation Y, so a gap can be seen between the two generations.)

Q. Life is about acquiring happiness  
(Agree+Somewhat agree)



Q. My definition of success: Success is being happy with who I am, despite what others say



### Social media

The top three content Gen Zers prefer to view on social media are 1. Text and photos, 60% (Generation Y: 65%); 2. Videos, 52% (Generation Y: 49%); and 3. Stories, 46% (Generation Y: 41%). They seem to prefer content that they can understand and enjoy intuitively with one look.

Q. What type of content do you prefer to view on social media? (Select up to 3)

	Text & Photos	Videos (IGTV, YouTube, etc.)	Stories (FB/IG Stories, etc.)	Memes	Short videos (TikTok, etc.)	Short text (Twitter, etc.)
	60%	52%	46%	32%	25%	20%
	65%	49%	41%	20%	20%	16%
	73%	49%	31%	11%	18%	12%

### Desire to solve social issues

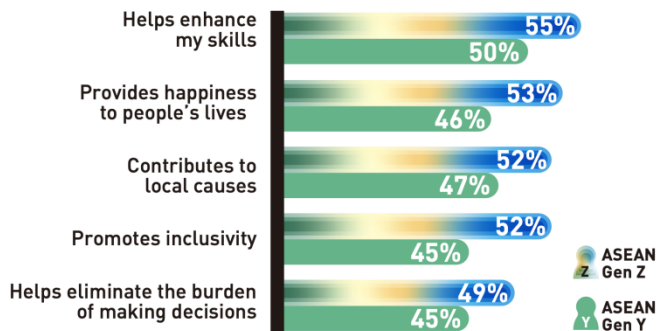
- With economic instability, inequality, political instability, conflict, human rights issues and COVID-19, Gen Zers live in an unstable society where many issues caused by previous generations remain. In our interviews, we saw that many wanted to solve social challenges with their peers. (Below are excerpts from interviews in ASEAN countries)

- *“Becoming a government official is my ideal. I want to expand the social security system in Thailand. I want real democracy. To get there, it starts with education, the family and awareness.”* (University student, 22, Thailand)
- *“Like us, nearly all Gen Zers worry about our future. We’re concerned about society, the economy and how we should live our lives. Everyone wants to live a good life. Our generation is not kids anymore. We have our own ideas and now express ourselves on social media and what not more than previous generations.”* (University student, 20, Thailand)
- *“I am interested in the topic of LGBTQ. I have a lot of friends who are part of the community. Because we have the right to express our opinions, I think I need to speak out on social media and the like for people affected by this issue.”* (High school student, 17, Philippines)
- *“The most important thing in my ideal life is contributing to society. I’m currently active with my friends, teaching English and public speaking to disadvantaged kids, protecting wildlife and cleaning up rivers, among other things.”* (High school student, 17, Indonesia)

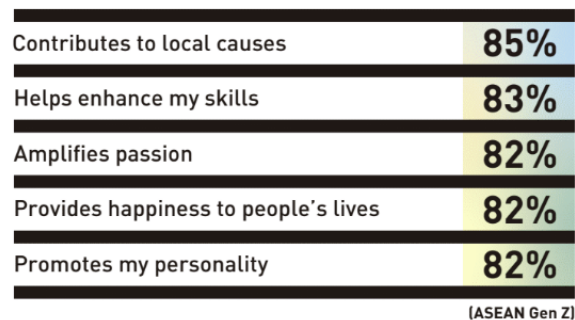
### Values they seek from brands

- Because ASEAN Gen Zers place importance on social issues, compared to previous generations their demands of brands are high—including that they contribute to their communities and create happiness in people’s lives—and they expect them to fulfill many functions.
- More than 80% of ASEAN Gen Zers agreed that they are willing to pay more for brands that contribute to society.

#### Important roles for a brand to fulfill (Top 5) (Very important)



#### Willing to pay 10% more if the brand fulfills the following purpose (Top 5)

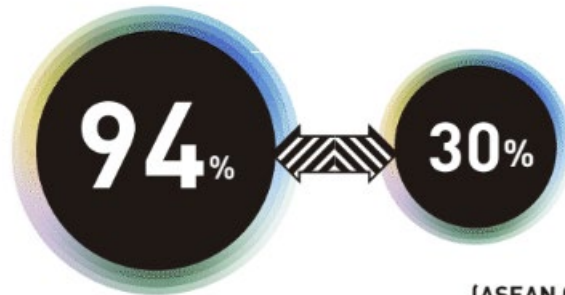


### Shopping style

- 94% of ASEAN Gen Zers prefer owning something rather than renting it, in sharp contrast to the 30% who prefer renting something over owning it. In addition to wanting to feel the security and stability of owning something, perhaps the fact that there are several ways to let go of things after buying them in ASEAN, including C-to-C apps for selling used items and rich return services at online shopping services, contributes to this.

I prefer **owning**  
something over  
renting it  
(Agree+Somewhat agree)

I prefer **renting**  
something over  
owning it  
(Agree+Somewhat agree)



(ASEAN Gen Z)



## Outline of quantitative survey

Survey method: Internet survey  
Territories: Thailand, Malaysia, Indonesia, Vietnam, Singapore, Philippines, Japan  
Respondents: 4,500 males and females aged 15–55  
The following three generations were interviewed  
- Generation Z (aged 15–23): 1,800  
- Generation Y (aged 24–39): 1,800  
- Generation X (aged 40–55): 900  
(All ages as of September 2020)  
Survey period: September 2020

## Outline of qualitative study

Survey method: Group interviews  
Territories: Thailand, Vietnam (face-to-face interviews)  
Malaysia, Indonesia, Singapore, Philippines (online interviews)  
Respondents: 54 samples (9 in each country)  
Gen Zers (aged 17–23) from the following three groups were interviewed in each country  
(1) First-jobbers  
(2) University students  
(3) High school students  
Survey period: October 2020

## ■ 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. It supports clients' marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

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

## ■ 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 third largest advertising agency according to *Advertising Age's* "Agency Report 2020."

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](http://www.hakuodo-global.com)