

ASEAN SEI-KATSU-SHA STUDIES 2021



"Now you Z me"

**DEBUNKING MYTHS ABOUT
ASEAN'S GENERATION Z**

Meet ASEAN's GEN Z.

CRITICAL OF BOOMERS, CRITICIZED BY MILLENNIALS

Introducing ASEAN's Generation Z, the newest cohort to come of age. Born between the years of 1997 and 2012, Generation Z is now beginning to make waves in society as the majority enter their late teens and young adult years. This group of individuals will soon be joining the workforce for the very first time.



THE RISE OF GEN Z

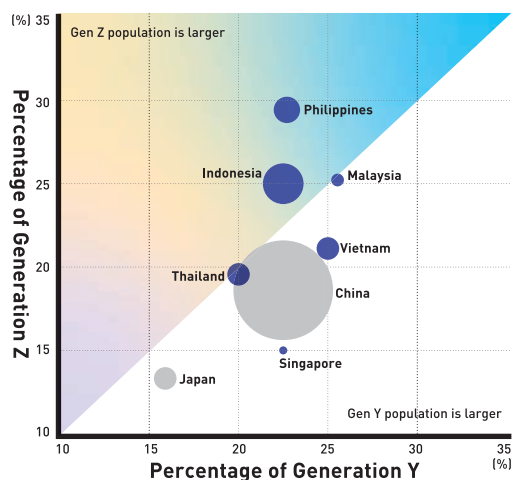
As of 2020, it is estimated that the Gen Z cohort numbers around 2 billion globally. They were born in the internet era during the peak of the tech bubble. Growing up in this time and age, they're completely comfortable with the internet and have been dubbed true digital natives. Put simply, they never knew a world without technology and the internet.

By 2030, it is expected that these 8 to 23-year-olds are going to make up 25% of the world's global workforce. In the next decade, this generation will be spending and consuming more as they enter adulthood.

*Millennials are also referred to as "Generation Y."
In this report, the terms are used interchangeably.

THE RISE OF GEN Z IN ASEAN

It is estimated that there were 164 million Gen Zers in the ASEAN region in 2020. This number is around 25% of the entire ASEAN population and is higher than the percentage in other regions. Thus, it is all the more important that companies understand the characteristics of ASEAN's Gen Z for their corporate and marketing activities.






Source: United Nations
Department of Economic and Social Affairs, Population Division (2019).
World Population Prospects 2019, Online Edition, Rev. 1.

Debunking the biggest myths about ASEAN'S GENERATION Z

Many studies about Baby Boomers, Generation X, and Millennials have been published globally. However, research on Generation Z is still sparse. There is a growing need to unravel the mystery of this generation, especially in the context of the ASEAN region. This study aims to do just that.

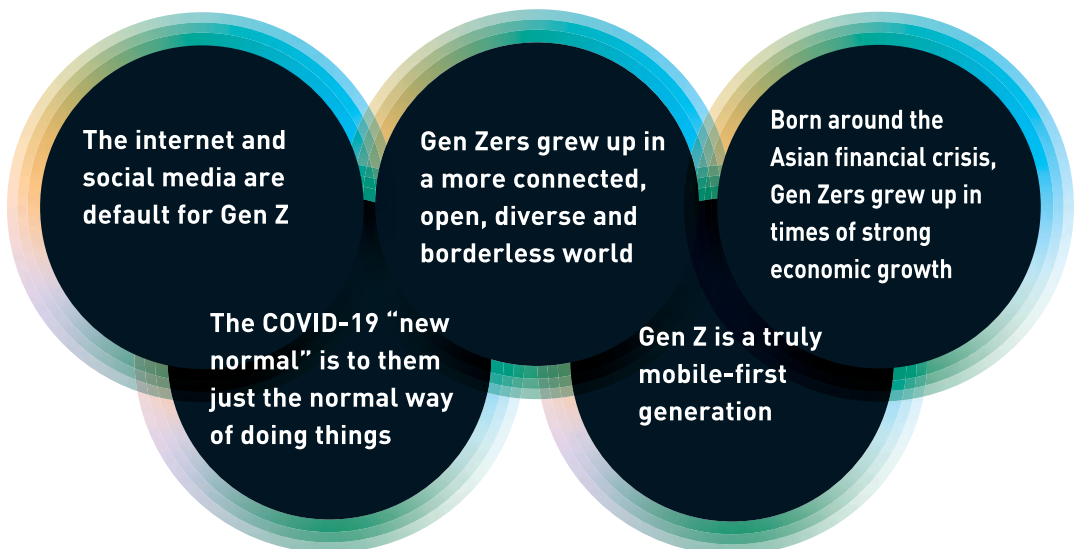
DEFINING THE GENERATIONS

	 Gen X (Born 1965–1980)	 Gen Y (Born 1981–1996)	 Gen Z (Born 1997–2012)
What they hold dear (Life values)	Safety Stability	Freedom Flexibility	?
Who they hold dear (Relationships)	Family	Self	?
What makes them happy	Certainty in their lives	Expressing themselves	?

Source: "ASEAN MILLENNIALS: One Size Fits All?", Hakuohdo Institute of Life and Living ASEAN, 2016–2017

WHAT WE KNOW SO FAR ABOUT GENERATION Z

The environment and circumstances that Gen Zers grew up in has created certain truths and characteristics that are unique to them.





THE BIG QUESTION

As the future of ASEAN

**ARE GEN ZERS BEING
MISTJUDGED?**

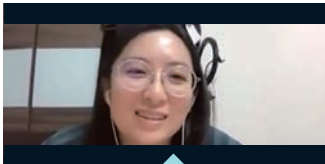
Myths about ASEAN's Gen Z:

The absence of major studies of ASEAN's Gen Z has resulted in a lack of real understanding of the group. In some ways, this has created stereotypes and mischaracterizations of them.

PERSONAL CONNECTIONS:	LIFE VALUES:	MEDIA:
"Gen Zers always put themselves first. They're apathetic and don't care"	"Gen Zers are complex and extreme. They prioritize individuality over society"	"Gen Zers are unfiltered and overly dependent on social media"

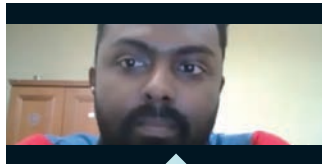
Gen Zers: How they see themselves

BUT... Gen Z respondents would disagree. They don't see themselves the way society defines them. We would like to dig deeper to debunk the myths about ASEAN's Gen Z.



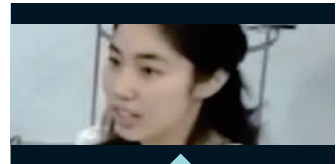
"To a certain degree, I feel like we are still conservative. I would say a number of us would prefer to live a simple and comfortable life."

—First-jobber, 23, Singapore



"I disagree when the media label us as a 'have-it-all', spoiled and extreme generation. They might just be doing it to capture their audience's attention as it may be true for a chosen few, but the majority of us aren't really like that."

—University student, 22, Malaysia



"They say we only care about ourselves because of how freely we express ourselves, but that's not true. I still care about what others think of me."

—First-jobber, 22, Thailand

Research method





QUANTITATIVE STUDY

Method: Online survey

Sample size: 4,500

Target: Males and females, SEC A-C
- Generation Z (age 15-23*): 1,800 samples
- Millennial (age 24-39*): 1,800 samples
- Generation X (age 40-55*): 900 samples

Areas covered: Indonesia, Malaysia, Philippines, Vietnam, Singapore, Thailand, Japan

Survey period: September 2020

* Age at the time of the survey



QUALITATIVE STUDY

Method:
- Focus group interviews (Thailand, Vietnam)
- Online interviews (Indonesia, Malaysia, Philippines and Singapore)

Sample size: 54 (9 samples per country)

Target: Males and females, SEC A-B
3 groups of Generation Zers (age 17-23*) per country
- First-jobbers
- University students
- High school students

Areas covered: Indonesia, Malaysia, Philippines, Vietnam, Singapore, Thailand

Survey period: October 2020

* Age at the time of the survey

Debunking the biggest myths about ASEAN's Generation Z **1** :

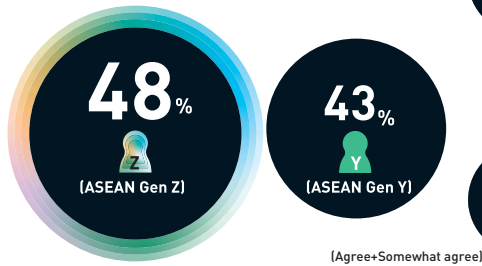
PERSONAL CONNECTIONS

Personal connections - Family and people around me

THE GENERATION WITH THE MOST CASUAL RELATIONSHIP WITH THEIR PARENTS

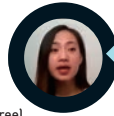
Generation Z was born and raised in a relatively stable environment, economically and socially. Compared to previous generations, they have been given more financial support and educational opportunities but, it seems, they experienced less strict discipline from their parents and lower expectations about "how they should be." About 50% of ASEAN Gen Z respondents answered that their relationship with their parents was "casual." This can be thought of as a major change in the ASEAN region, where the parent-child relationship has usually been more conservative.

Relationship with my parents is casual and friend-like



"They are very easy-going. My parents respect my own space, my own pace, my own view, interests and life. If I need to make decisions on something, they would give me guidance rather than forcing me to obey."

—High school student, 17, Vietnam



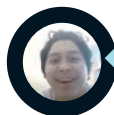
"She is like my best buddy. I can talk about the most sensitive matter with my mom."

—First-jobber, 23, Indonesia

RAISED TO HAVE THEIR OWN OPINIONS

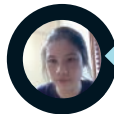
As the parent-child relationship becomes more casual, upbringings where children are expected to follow what their parents say and choose only what their parents decide for them have become less common.

Many ASEAN Gen Zers were raised to have their own opinions and ideas. This, coupled with their ability to access limitless information from the internet, has helped them to form their unique and expressive character.



"My parents want me to grow by myself, think on my own. Everything is my own choice."

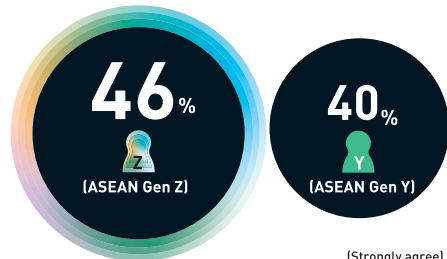
—First-jobber, 21, Philippines



"They encourage me to have my own thoughts and respect my decisions and choices."

—University student, 20, Singapore

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



Debunking the biggest myths about ASEAN's Generation Z¹:

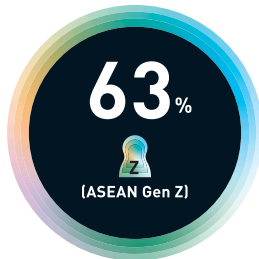
PERSONAL CONNECTIONS

Personal connections - Family and people around me

TIME MAY HAVE PASSED, BUT ASEAN VALUES AND NORMS REMAIN

ASEAN Gen Zers grew up in casual parent-child relationships and were encouraged to have their own opinions, making it easy for older generations to think of them as, “a free-spirit generation that grew up spoiled in an economically prosperous environment” or “a generation that prioritizes their own individualism and independence.” However, our study found that the majority of **ASEAN Gen Zers still have traditional ideas and values rooted in ASEAN culture.**

Encouraged to follow traditions and norms set by others



(Agree+Somewhat agree)



“My parents teach me basic rules and manners that they think should be taught to me.”
—University student, 23, Singapore



“I’m in harmony with my parents. They totally respect my choice in life, but still they are traditional. If I do something beyond the old norms, they would not be so happy, but still they would show support. Especially in love and life.”

—University student, 20, Vietnam

ASEAN “FAMILY FIRST” VALUES ARE DEEP-ROOTED

Another unique aspect of ASEAN’s Gen Z is that they prioritize their families higher than Millennials. Despite being raised by parents who said they could do what they wanted and live as they like, they seem **determined to take responsibility for their families.** Also, unlike the popular belief that Gen Zers emphasize their own paths to success, our study found that more than previous generations, **Gen Zers’ definition of success revolves around making their family and friends proud.**

My definition of success:

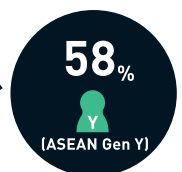
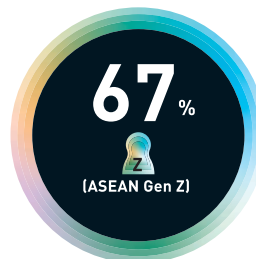
Success is making family and friends proud



“Family is always the first for me. I mean my parents.”
—First-jobber, 23, Vietnam



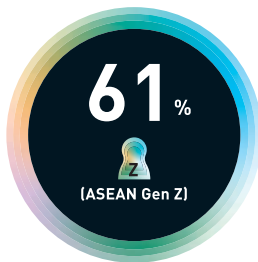
“I want to make my parents proud. I feel happy when they are happy, and I am sad when they are sad.”
— University student, 20, Thailand



EMPHASIS ON "HARMONY" BETWEEN SELF AND OTHERS

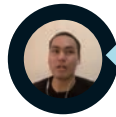
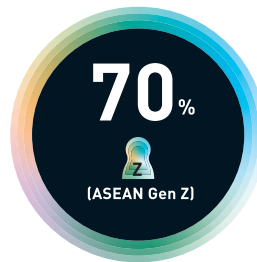
For ASEAN Gen Zers, who put high value on their families and communities, **being accepted and living in harmony with their loved ones are important elements of their happiness.**

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



"I need validation and words of encouragement from others. Those are very important to me. Even if I get a good grades, if the people around aren't proud of me or feel happy for me, I don't feel the sense of it."
—University student, 21, Singapore

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



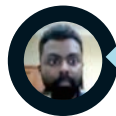
"For me, life is about socializing with people. Even if you collaborate with others, there will be issues with A, or with B. Independent people will have fewer social issues, but less interaction with others. It is not for me."
—First-jobber, 23, Indonesia

FINDING WAYS TO BALANCE HARMONY WITH OTHERS WHILE REMAINING TRUE TO THEMSELVES

Just because ASEAN Gen Zers try to stay in harmony with others does not mean that they put aside their identities or are dishonest about them. Instead, they **pick and choose different sides of themselves that best fit the time and situation in order to achieve the best possible harmony with people around them.**



"It's not about becoming a different person when you're with a different group of people. It's about being more flexible, adjusting to each social group so that we can be accepted and relatable."
—First-jobber, 23, Indonesia

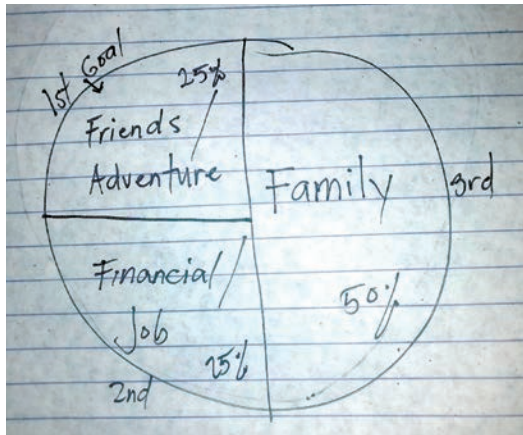


"You need to be happy with yourself before considering others' views on happiness. You can't let them dictate what makes you happy."
— University student, 22, Malaysia

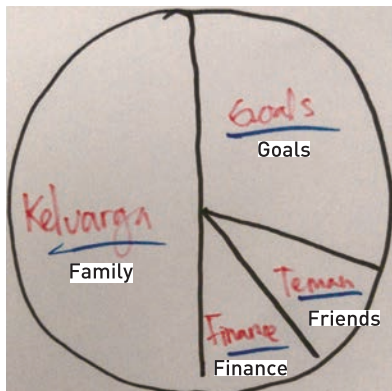
Debunking the biggest myths of ASEAN Generation Z 2:

LIFE VALUES

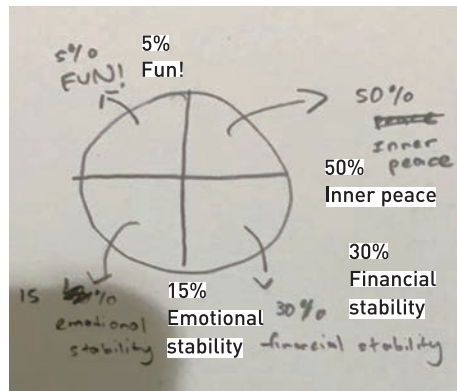
WHAT DO GEN ZERS' "IDEAL LIFE" PIE CHARTS LOOK LIKE?



University student, 20, Philippines

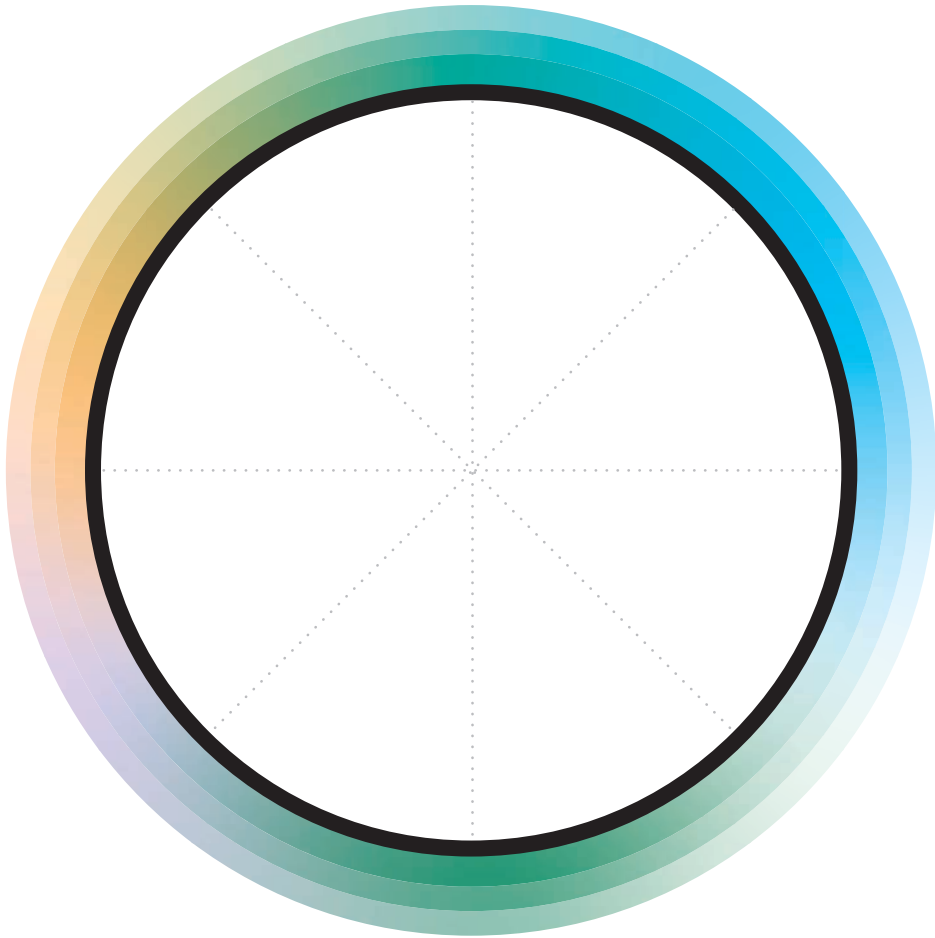


First-jobber, 23, Indonesia



University student, 22, Malaysia

**CREATE YOUR OWN PIE CHART.
WHAT WOULD YOUR IDEAL LIFE BE COMPOSED OF?**



**Do you think yours is different from those of Gen Zers?
Let's take a look at the life values of ASEAN's Gen Z.
They are completely different from any other generation.**

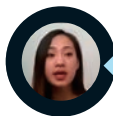
Debunking the biggest myths about ASEAN's Generation Z:

LIFE VALUES

HAPPINESS: RELATIONSHIPS WITH OTHERS

Balance between what makes them happy and what pleases their family

It is not just about making themselves happy. **To ASEAN Gen Zers, making their families and the people around them happy is still a priority and something they want to do.** This familial take on happiness is very much present and strongly influences ASEAN Gen Zers' values—something not very observable in Gen Zers in other regions.



"I want to be settled first. Then I can be a good daughter and support my family before I get married, because to me these goals are also for my family."
—First-jobber, 23, Indonesia



"Becoming a government official is my ideal. I can provide a stable life for my family and at the same time have enough "me time."
—University student, 22, Thailand



"I need to love myself first before I can extend that love to others. And I believe there's nothing wrong with that."
—University student, 21, Philippines

ASEAN Gen Zers' Life Values

Balancing responsibility for others and self-love

Life is about fulfilling responsibility
(Agree+ Somewhat agree)



86%

(ASEAN Gen Z)

SAME SCORE!

86%

(ASEAN Gen Z)

Life is about self-love
(Agree+ Somewhat agree)



HAPPINESS: RELATIONSHIP WITH THEMSELVES

Importance on own mental health. Worry/Stress matters

Celebrity suicides have caused a public uproar and demanded that the spotlight be placed on the importance of mental health. **ASEAN Gen Zers place the same importance on their mental health as they do on their physical health.** This is evident in the way they treat mental stability and inner peace as one of the foundations of their ideal life.

Life is about acquiring happiness
(Agree+Somewhat agree)

91%

(ASEAN Gen Z)



"Money is not our top priority. We also prioritize mental health; it's one of our treasures in life."
—University student, 22, Malaysia



"For me, happiness is having no stress, being with people I love, and getting to do things I love in a good environment."
—High school student, 17, Thailand



SUCCESS/ACHIEVEMENT

More fluid/non-materialistic. Aim to attain self-contentment

Growing up in the age of social networking has allowed ASEAN's Gen Z to see the lives of celebrities, micro-influencers, and even ordinary people that they follow. These Gen Zers know that **higher achievement does not necessarily bring success and happiness**. For them, those can be achieved by setting realistic goals that are centered on their own satisfaction and contentment.

HAPPINESS ITSELF IS SUCCESS

For ASEAN Gen Zers, happiness itself is considered to be success.

What's more, it is not just about their own happiness; the happiness of those around them is just as important.



"Achievement, is not necessarily materialistic. It is more about self-satisfaction."

—First-jobber, 23, Singapore

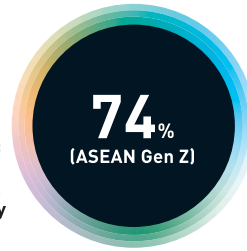


"Success in life is happiness that you feel. As long as you feel happiness every day, I think you are successful."

—High school student, 17, Thailand

Self-satisfaction itself is a big achievement for ASEAN's Gen Z

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



CAREER

A great career is one that provides financial and social stability for them and their family

With the ongoing economic and political disputes in ASEAN, Gen Zers are not only fighting for their emotional and financial stability, but the ability to provide support for their families as well. Thus, **this generation can be considered as more down-to-earth and "realistic"** compared to ASEAN Millennials—the "dreamers"—who have high hopes and chase individuality.



"My ideal career is one that gives me a stable income, not because I spend a lot on myself, but because I need to make sure that my parents are well taken care of."

—First-jobber, 22, Thailand



"I love the arts, but art won't provide me with social and economic stability. That's why I've decided to pursue a full-time 9-to-5 office job, so at least I will have stability and still have time to pursue my passions in the arts in my spare time."

—High school student, 16, Malaysia

Debunking the biggest myths about ASEAN's Generation Z 2:

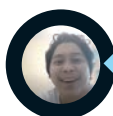
BRAND ENGAGEMENT AND CONSUMPTION

CONSUMPTION STYLE

Rational shoppers with strong desire to own things

ASEAN Gen Zers have a strong desire to buy and own things rather than rent them. They are rational shoppers. In comparison to ASEAN Millennials, who shop to express their individuality*, ASEAN Gen Zers shop with an emphasis on practicality and functional benefits. They decide their purchases based on online reviews, word of mouth, and recommendations from friends and family.

Source: "ASEAN MILLENNIALS: One Size Fits All?", Hakuodo Institute of Life and Living ASEAN, 2016–2017



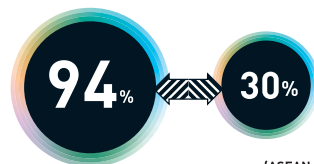
"I'm drawn to brands with products that perform well. It's how I say it's a nice brand."
—First-jobber, 21, Philippines



"If it is something that I want, I will read reviews. I want to hear about real users and the benefit of product."
—First-jobber, 23, Thailand

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

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



BRAND VALUES

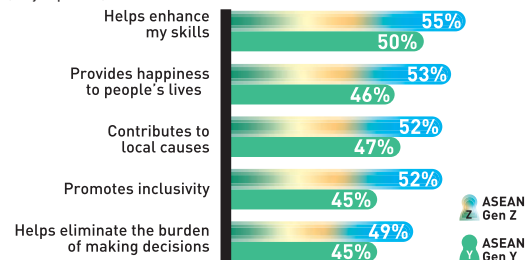
More demanding, but willing to pay extra for brands that promote conscious actions

ASEAN Gen Zers don't just evaluate brands by the products they offer, they look into the values the brand brings to society—and they are willing to pay more for brands that take this seriously. This generation has higher expectations of brands than their older counterparts. They expect brands to take the initiative in such areas as contributing to local causes and providing happiness in people's lives.

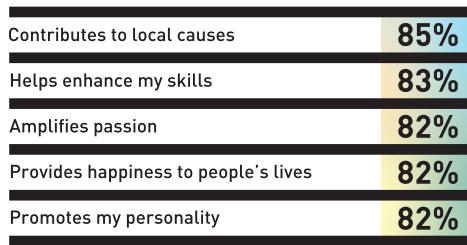
As ASEAN Gen Zers also value harmony with people around them, brands should avoid messages that are aggressive in tone or that might further inflame existing issues.

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)

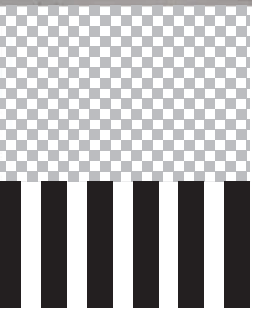
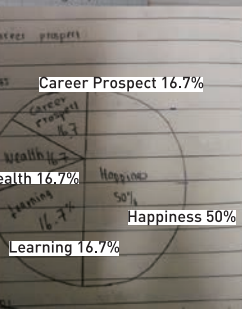
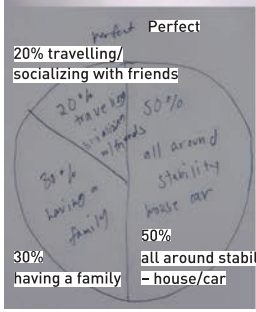
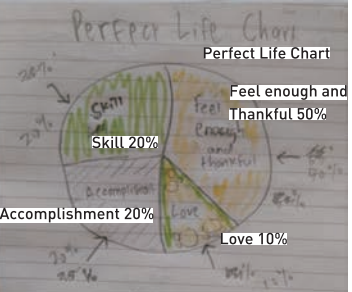
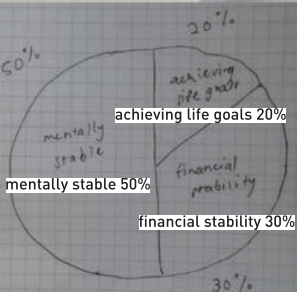
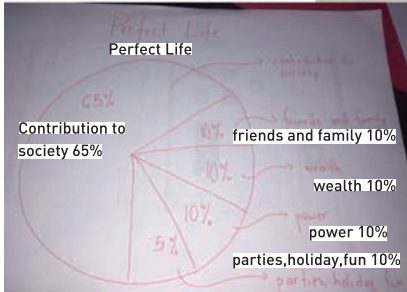
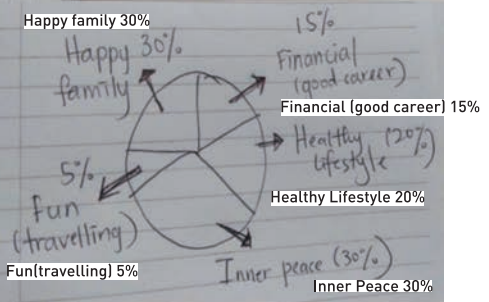
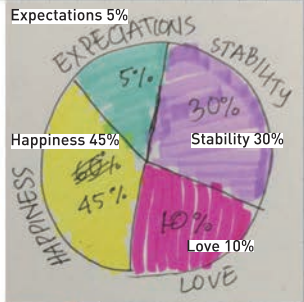
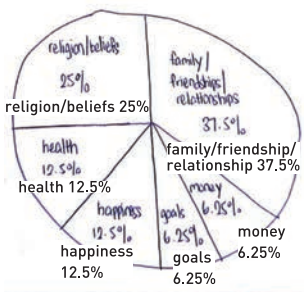
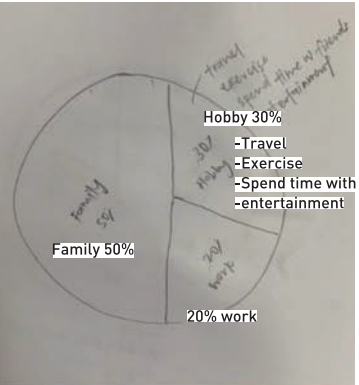


(ASEAN Gen Z)



"I think brand should not be political or take sides. Because if it is opposite of my opinion, I cannot use. I want brand to take the middle ground and should accept both sides."
—University student, 22, Thailand

SNEAK PEEK: GALLERY OF ASEAN GEN ZERS' IDEAL LIFE



Debunking the biggest myths about ASEAN's Generation Z ③:

MEDIA AND SOCIAL NETWORKS

Gen Z Media

ASEAN's Gen Z has the world in the palm of their hands, which could be the reason behind the "glued-to-their-phones generation" stereotype. But what are they actually thinking and doing on their screens?

DIFFERENT APPS, DIFFERENT RULES

While older ASEAN generations might use social platforms fairly similarly, ASEAN Gen Zers are unique in how they utilize each platform. Additionally, **brands are welcome to join the party as long as they don't kill the vibe or break unwritten rules**. Their content has to be relevant and tailor-fit to the app they're on.



Facebook to be in the know



The purpose of FB is to get information rather than to share views. They use the save and share functions, but restrict them so that only they can see the articles they're interested in.

86%

To catch up with global news

Gram it to be seen



They use Instagram and its Stories feature to capture and share candid everyday moments. They also use it to get lifestyle trend updates. And get this, the majority of them have multiple IG accounts!

72%

To show people what I am up to in life

Tweet it to be heard



Not only do they rely on Twitter to get fast updates on current and trending topics but, as the app encourages anonymity, they can share anything they think or feel real-time. This eases their loneliness and lifts their spirits.

66%

To feel less lonely

TikTok to be entertained



Raw, authentic, bite-size content is what makes Tiktok irresistible to this generation. It's a platform that keeps them happy, entertained and even inspired.

82%

To entertain and relax

*All data above refers to ASEAN Gen Zers

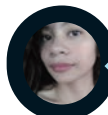
CONTRIBUTING TO SOCIAL ISSUES USING THE POWER OF SOCIAL MEDIA

Needless to say, ASEAN's Generation Z has higher digital literacy than any other generation. **This skill is used not just for their entertainment, but also for social issues.**

This characteristic can be observed in various social movements on social media initiated by ASEAN Gen Zers covering a wide range of topics, from environmental problems to social issues in their country and community. Through "group power," they gather on social media and try to find solutions together. They are determined to take action to improve the issues they think previous generations have left for them to solve.



"Biggest portion of my ideal life is contribution to the society. Current initiatives that I'm doing with my friends are teaching English and public speaking to kids, preserving wild life and cleaning up the river. My key message is if you want to achieve world peace and anti-violence, just begin from the very basic."
—High school student, 17, Indonesia



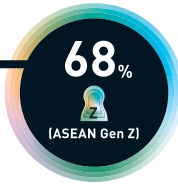
"I'm certainly affected in the topic of LGBTQ, because I have a lot of friends who are a part of it. Most of them are not accepted by their parents, and I want to use different platforms to practice our freedom of speech. Now, we have this privilege to voice out our opinion and speak up for those people who are affected of these different issues."
—High school student, 17, Philippines

DIFFERENT SIDES. DIFFERENT SITES. ONE SELF.

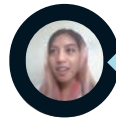
ASEAN's Gen Z is often judged as having multiple identities and personalities across platforms, but that's not actually the case. In reality, Gen Zers just have **distinct preferences on the level of self-awareness they want to showcase on each platform**. This is their reality. Being able to show different aspects of themselves that are more specific to the audiences they serve is second nature to them. It's how they stay true to themselves.



I want to show my natural self on social media*

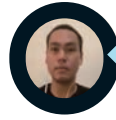


*Agree+Somewhat agree



"In the case of Twitter, I portray myself differently because of the fandoms I follow. My personality should be more specific to the fandom, that's why I try my best to quickly adjust. But, my personal account mirrors who I really am."

—University student, 21, Philippines



"I categorize my audience. I have two accounts on Instagram: one for my friends and colleagues—the nice ones—and another for the naughty ones. On Facebook, I have my family, neighbors and childhood friends. Having multiple accounts doesn't make me fake. I just want to control how much of myself is seen out there to avoid rumors."

—First-jobber, 23, Indonesia



"I have a private account that only my close friends can have access to. I don't want members of my family to see me in inappropriate outfits or while I'm being crazy. I don't want to be judged."

—Polytechnic student, 16, Malaysia

VISUAL, SENSORIAL AND FULFILLING CONTENT

Text and photos are the preferred content across all ASEAN generations, but Gen Zers, in particular, go for **visually aesthetic and more sensorial formats, such as Stories and memes**, compared to the older generations.

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%

Debunking the biggest myths about ASEAN's Generation Z:

This generation has been labeled with many stereotypes, but our study reveals the truth.

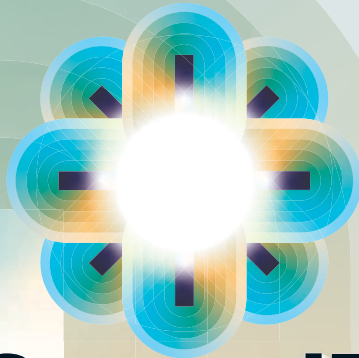
Myth	Truth
<p>PERSONAL CONNECTIONS:</p> <p>“Gen Zers always put themselves first; they’re apathetic and don’t care”</p>	<p>Believe that self-worth is as important as familial ties and societal connections.</p> <p>Value collectivism and collaboration</p>
<p>LIFE VALUES:</p> <p>“Gen Zers are complex and extreme. They prioritize individuality over society”</p>	<p>Harmony within self, with others and society</p> <ul style="list-style-type: none"> - Desire life balance and fulfillment in multiple facets of their lives. Achieve harmony by accepting the differences of others - Aware, perceptive and reciprocate the good others share with them. Aim to actively participate in bettering the world
<p>MEDIA:</p> <p>“Gen Zers are unfiltered and overly dependent of social media”</p>	<p>Compartmentalize social media usage and utilize it for social issues</p> <ul style="list-style-type: none"> - Respect privacy and are conscientious in their usage of social media. Authentic, but filtered. Open yet compartmentalized - Want to take part in solving social issues by leveraging the power of social media

SO, HOW ARE THEY DIFFERENT FROM PREVIOUS GENERATIONS?

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

INTRODUCING

ASEAN's Generation Z



“The SynergiZers”

ASEAN GEN ZERS MAKE THE VARIOUS FACETS OF THEIR LIFE WORK TOGETHER TO OPTIMALLY ACHIEVE HARMONY BETWEEN THEMSELVES, THEIR FAMILY AND SOCIETY.

ASEAN Gen Zers were raised to be critical, well-informed, and aware of realities brought about by the choices of the generations before them. They acknowledge the need for a different future where universal harmony is essential.

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.

They become well-rounded by fulfilling their personal and professional goals while keeping the peace and initiating synergies among their peers and the community. An ideal life for them is a life of independence, growth and freedom that is guided by the limits they have set for themselves as more rational thinkers.

Adapt and overcome. ASEAN Gen Zers are aware of real-world conflict and want to be part of solution. Perhaps Gen Zers can restore faith in humanity.

What Can Brands do to Co-exist with ASEAN's Gen Z?



EMBRAZIVE MARKETING

ASEAN Gen Zers put emphasis on harmonious relationships within the community to create for themselves a more comfortable space to live in. This also applies in their **need for brands to actively participate in addressing societal issues**. One thing to note is that brands don't have to use aggressive tones. They just need to take a stand for the common good.

Brands that value diversity and inclusion are more likely to be supported by ASEAN Gen Zers. They can do this by offering products and services that further the "no one gets left behind" idea.

A NEW TAKE ON USPS AND RTBS

When EmbraZive Marketing is applied, brands should reconsider and re-align the values they put forward. One great way to start is to rethink their definitions of USP and RTB. We encourage brands to transform their **unique selling points** into **unique social perspectives** to ensure clarity of where their brand stands on specific issues. And also to turn their **reasons to believe** into **reasons to bond**, so that they can interact with Gen Zers in their interest and passion spaces.



BE BRAVE. SHOW DIFFERENT SIDES OF THE BRAND AND TAILOR THEM TO EACH SOCIAL MEDIA PLATFORM

ASEAN Gen Zers are jacks of all trades when it comes to social media. They jump from one platform to another and are unafraid of creating multiple accounts for different purposes.

Understanding Gen Zers' needs in each platform is key to optimally connecting with them. **Brands should not shy away from showing other aspects of the brand to match Gen Zers' energy** by experimenting with diverse characterizations and expression in their communications. As this young generation values personalization, brands are also encouraged to not only observe but act to win their hearts in this realm.



CO-CREATE AND ADDRESS ISSUES WITH GENERATION ZERS, WHO ARE THE SELF-EXPRESSION EXPERTS

In comparison with Millennials, Gen Zers associate more closely and connect more strongly with brands that actively participate in solving social issues. This does not mean they need help in putting forward causes, but rather that **they are determined to address these conflicts and would appreciate every help they can get** to see their vision to fruition.

Brands can team up with ASEAN Gen Zers in speaking up and expressing themselves more freely. As an example, brands can support Gen Zers by creating activities that foster harmony and collaboration. These brand initiatives will show this generation how invested a brand is in furthering its purpose of tackling important issues in society. With this technique, brands can ensure that bonds are created and that they will have the support of Gen Zers even after they have grown older.



PRACTICAL, NO-FRILLS COMMUNICATION WORKS FOR THESE RATIONAL SHOPPERS

ASEAN Gen Zers are not the type to buy commodities based on temporary cravings and instant gratification. They prioritize actual benefits with each purchase. Rather than exploring fancy and superficial routes, brands should **focus on functionality and put heavier weight on value for money.** To capture the hearts of rational shoppers who value owning over renting for long-term use, brands should start thinking about **positioning their products as more practical and be more on point in their value communication.** The more no-frills and direct to the point their content is the better.

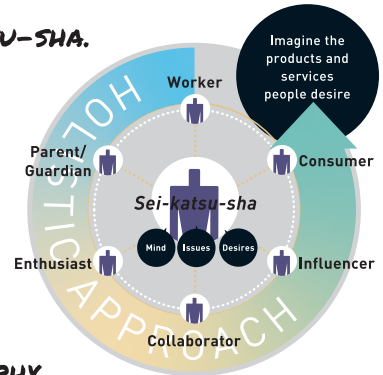
Allow products to speak for themselves. The assignment for communicators is to be more **straightforward and clear about product benefits** so that Gen Zers can actually see themselves using the product. Simple and honest content is most appreciated.

What is HakuHodo Institute of Life and Living ASEAN?

A THINK TANK DEDICATED TO STUDYING SEI-KATSU-SHA.

HakuHodo Institute of Life and Living ASEAN (HILL ASEAN) was established in 2014 as the HakuHodo Group’s think tank in the ASEAN region.

By studying the new lifestyles of *sei-katsu-sha*—our term for the holistic person—emerging in this region and sharing marketing ideas about them, we hope to help companies with their marketing efforts in ASEAN countries.



HAKUHODO’S SEI-KATSU-SHA INSIGHT PHILOSOPHY

At HakuHodo, we describe people not simply as “consumers” but as *sei-katsu-sha*—fully rounded individuals with their own lifestyles, aspirations, and dreams.

“Consumer” is a producer-centric term that refers only to one facet of people’s lives. Human beings don’t exist solely to consume. They do much more than just shop. They are workers, residents, citizens, somebody’s son or daughter, and perhaps also a parent. At HakuHodo, we use the term *sei-katsu-sha* to go beyond the consumer to understand the whole person and develop marketing approaches based on their true desires.

Why study ASEAN *sei-katsu-sha*?

The formation of the AEC (ASEAN Economic Community) has given further impetus to the flow of people and goods within the region and heightened interest in ASEAN as one big market.

ASEAN is a patchwork of countries that differ in language, religion, and cultural background. However, identifying commonalities among ASEAN *sei-katsu-sha* that transcend these differences makes it possible for us to gain a bird’s eye view of the entire ASEAN market.

Determining what ASEAN *sei-katsu-sha* have in common also serves as a useful yardstick for understanding how each country differs.

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

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

Survey work, research and presentation

Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN)

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Yuko Ito

Emmanuel James G. Mangahas (Vietnam)

Takashi Kanamori

Tomoka Takada

Prompton Supataravanich (Thailand)

Wannarat Wisawasukmongchol (Thailand)

Suthawan Pittawong (Thailand)

Krittamate Wuthimatheekul (Thailand)

Patchama Lertlunjakorn (Thailand)

Arunrote Laocharoenwong (Thailand)

Poonnapa Chuayboon (Thailand)

Pimpich Teerapittayanon (Thailand)

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