



ASEAN SEI-KATSU-SHA FORUM 2017-18

New perspective of
Gender equality at home

Who rules the house?

Prologue

Gender equality.

As a hot-button social topic, it gains a lot of attention.

Looking at related initiatives of the United Nations and other organizations, gender equality is discussed in relation to education, health, identity, work, violence and politics.

However, here at HILL ASEAN, we examined gender equality through the eyes of *sei-katsu-sha*—our term for the “holistic person”—to understand it from a more intimate perspective: gender equality in the ASEAN home.

Conventionally, husbands have been the leader of the household while wives have taken care of the home. Does this kind of traditional thinking still hold true among today’s ASEAN *sei-katsu-sha*?

In the following pages we reveal the roles of husbands and wives in ASEAN households and how couples make decisions. We also give fresh viewpoints on marketing approaches companies might take in light of these discoveries.

Introduction Increasing gender equality awareness

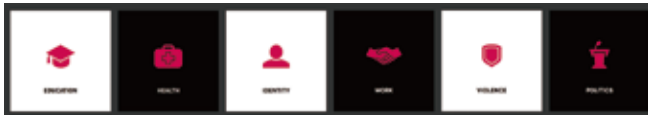
Why is gender equality important?



Gender equality is in the spotlight as a social issue. But why?

The United Nations' Sustainable Development Goals: 17 Goals To Transform Our World explains why gender equality matters as follows: "Women and girls represent half of the world's population and therefore also half of its potential. But today gender inequality persists everywhere and stagnates social progress."

The United Nations has highlighted six areas where work needs to be done in relation to gender equality: education, health, identity, work, violence and politics.



Where gender equality matters



Gender equality in ASEAN countries



Gender equality rankings according to The World Economic Forum's The Global Gender Gap Report 2016.

The Report ranks 144 countries based on the four indexes economic participation and opportunity, political empowerment, health and survival, and education attainment.

1	Iceland	65	Vietnam	106	Malaysia
20	UK	71	Thailand	111	Japan
45	USA	88	Indonesia		
55	Singapore	99	China		

(The higher the rank, the smaller the gender gap)

The rankings imply that ASEAN countries still lag behind in terms of gender equality. But does this lag also apply to actual ASEAN households?

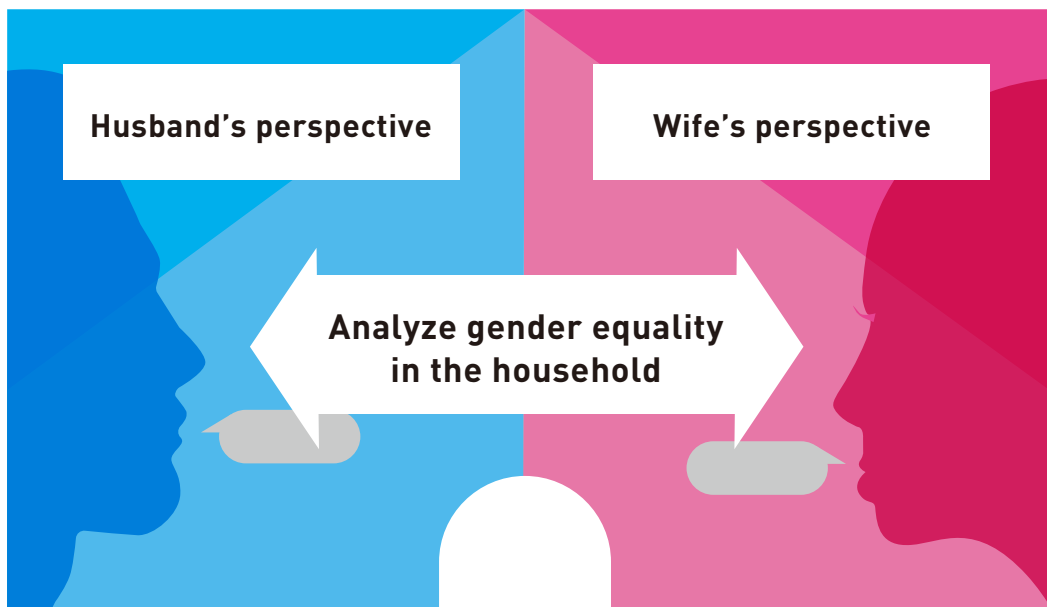
Question What is the actual gender equality situation in ASEAN households?



Focus: The division of roles between husbands and wives and how couples make decisions in their household

HILL ASEAN always thinks from *sei-katsu-sha* perspectives. In analyzing gender equality, too, we stood in the shoes of *sei-katsu-sha*, and focused on the division of roles between husbands and wives, as well as how they make decisions.

Analysis method Separate analysis of the perspectives of husbands and wives



Quantitative surveys

HILL ASEAN Fixed Point Survey

- Method:** Home interview survey
Target: Male and female *sei-katsu-sha* aged 15–59 in SEC categories A–D
Areas covered: Singapore, Kuala Lumpur (Malaysia), Bangkok and Nakhon Ratchasima (Thailand), Jakarta and Surabaya (Indonesia), Hanoi and Ho Chi Minh City (Vietnam), Yangon (Myanmar), Manila (Philippines)
Sample size: 8,100 samples (900 samples each in the 7 main cities, and 600 each in Nakhon Ratchasima, Surabaya and Hanoi)
Sample allocation: In line with the demographic structure of each country
Survey period: December 2015–January 2016

HILL ASEAN Gender Equality Perceptions Survey

- Method:** Internet survey
Target: Male and female *sei-katsu-sha* aged 20–49 in SEC categories A–C
Areas covered: Singapore, Malaysia, Thailand, Indonesia, Vietnam
Sample size: 5,000 samples (1,000 samples per country)
Sample allocation: In line with the demographic structure in each country
Survey period: August 2017

HILL ASEAN Home-Visit Interview

- Target:** Male and female *sei-katsu-sha* in SEC categories A–C
Areas covered: Singapore, Kuala Lumpur (Malaysia), Bangkok (Thailand), Jakarta (Indonesia), Ho Chi Minh City (Vietnam)
Sample size: 6 couples (12 people) per country. Total 60 people
Survey period: September 2017

Qualitative survey

Different types of ASEAN household based on the division of roles between husband and wife

Q. As husband and wife, how do you divide roles in your household?

So-called "traditional families," where the husband works and the wife stays home, account for only about one quarter of ASEAN households nowadays. So what household type represents most ASEAN families today?

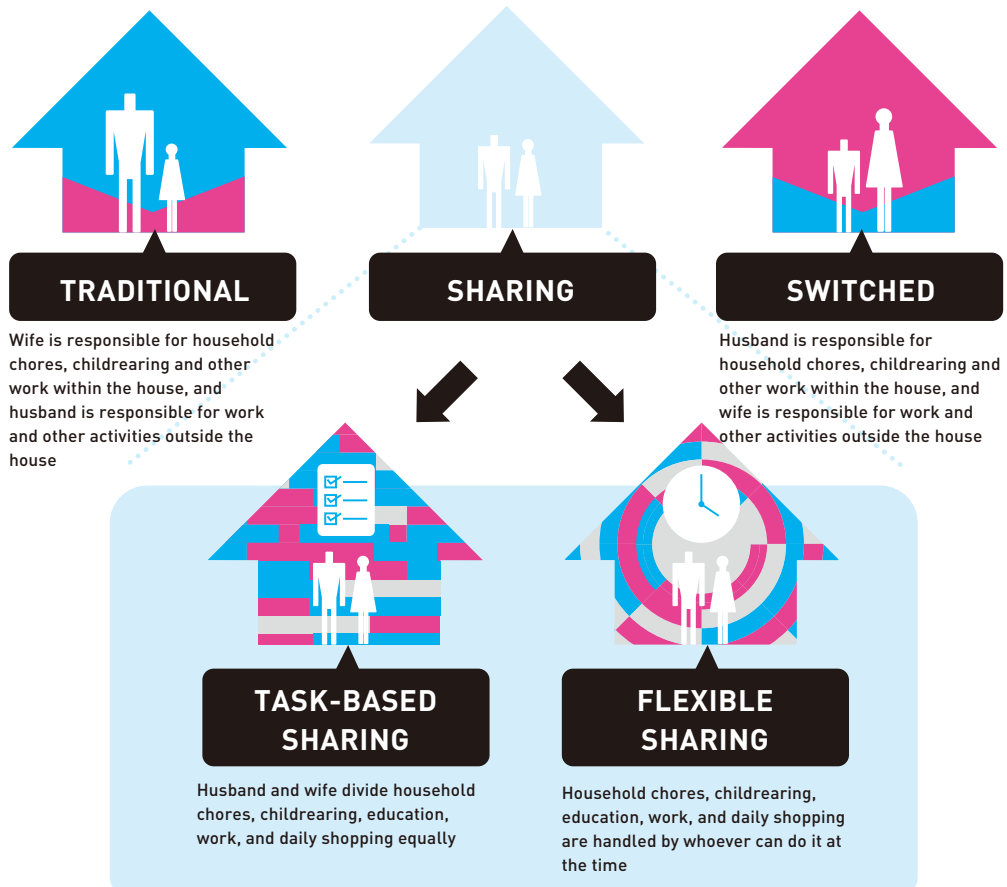
TRADITIONAL

Wife is responsible for work within the house such as household chores and child rearing, and the husband is responsible for outside the house, such as work



HILL ASEAN Gender Equality Perceptions Survey

Household types based on the division of roles between husband and wife



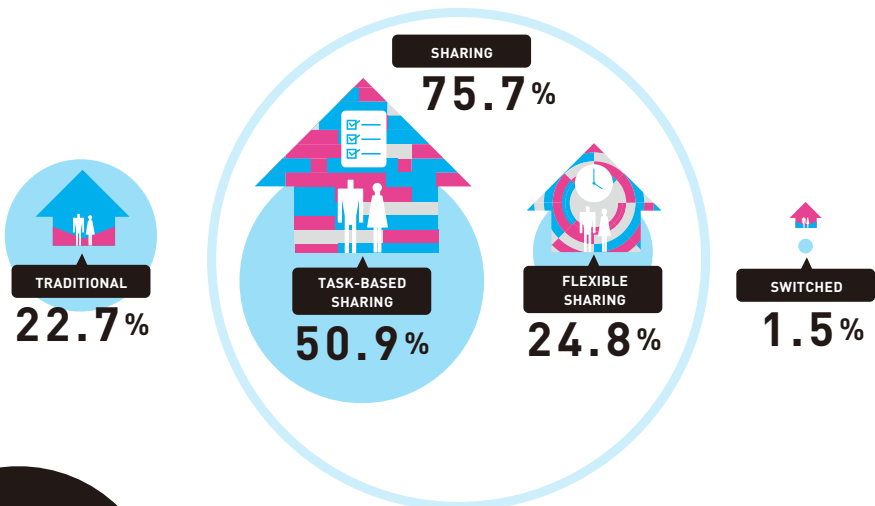
Sharing The majority of ASEAN households

ASEAN household types

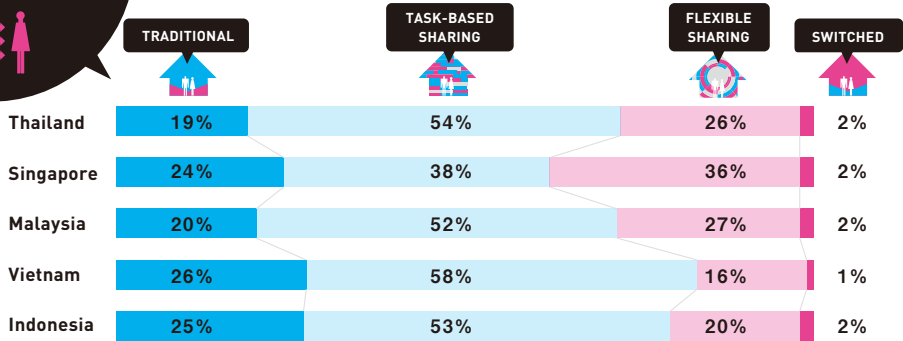


Three quarters of households in ASEAN are Sharing type. Husbands and wives sharing responsibility for all tasks, including household chores and childrearing, has become the new norm in the region.

Household roles and responsibilities are no longer divided based on conventional ideas about gender.



Scores for each country (%)



HILL ASEAN Gender Equality Perceptions Survey

Three reasons Sharing households are the majority in ASEAN

1

Husband and wife both work



Over 80% of married couples in ASEAN both work

	Only husband earns	Both husband and wife earn TOTAL	Both husband and wife earn and husband earns more	Husband and wife earn a similar amount	Both husband and wife earn and wife earns more	Only wife earns
5-Country average (%)	14	84	52	24	9	1
Thailand	7	91	53	28	11	1
Singapore	18	80	49	20	12	2
Malaysia	18	80	49	21	10	1
Vietnam	2	97	55	37	6	0
Indonesia	25	74	54	14	6	1

HILL ASEAN Gender Equality Perceptions Survey

It's okay for women to work in high-ranking/management positions

ASEAN 7-country average



It's okay for the woman to lead a relationship

ASEAN 7-country average



2

Female empowerment



HILL ASEAN Fixed Point Survey

3

Technological advancements help blur gender boundaries



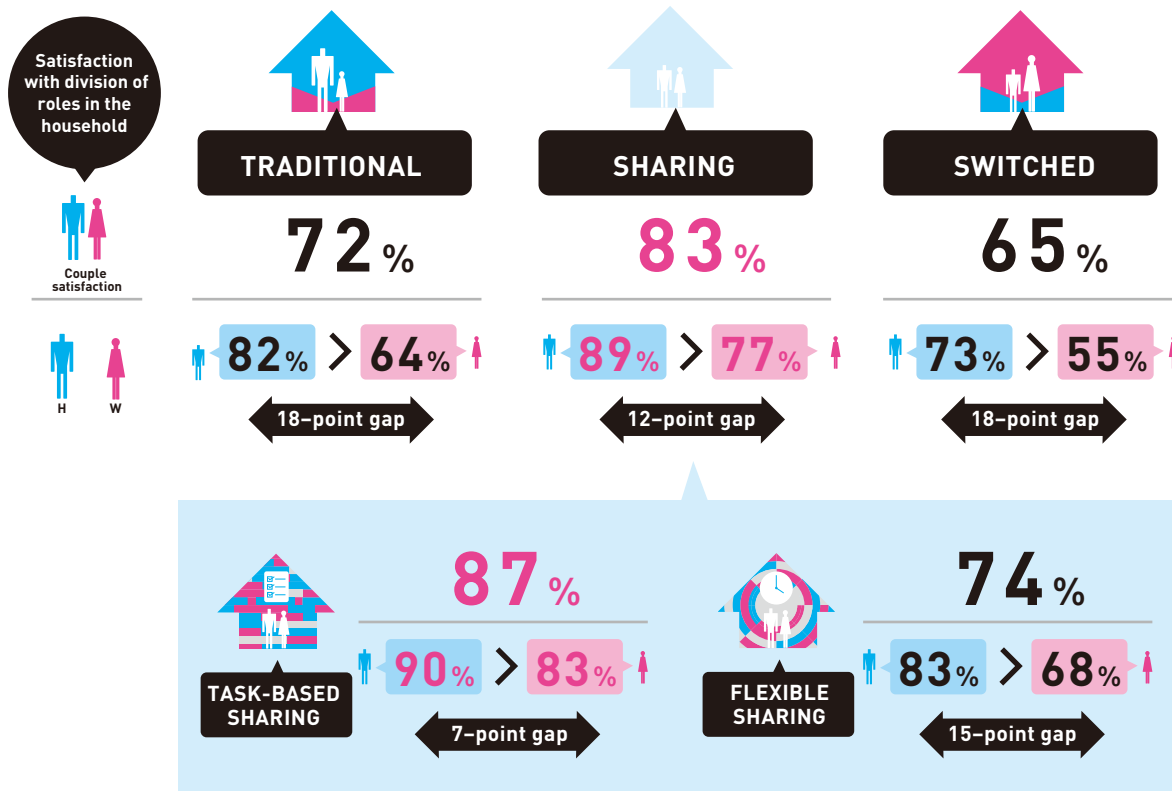
A stay-at-home mom sells homemade chili paste online to help the family finances. The husband works from home, so has time to help with childrearing (Indonesia, Flexible)



Husband read about the benefits of goat's milk on Facebook and has bought it for the kids to drink ever since (Malaysia, Task-based)

Satisfaction level of the four household types

- Satisfaction levels vary by household type.
- Shared households, particularly Task-based households, are the most satisfied overall and have the smallest gap in satisfaction between the husband and wife.

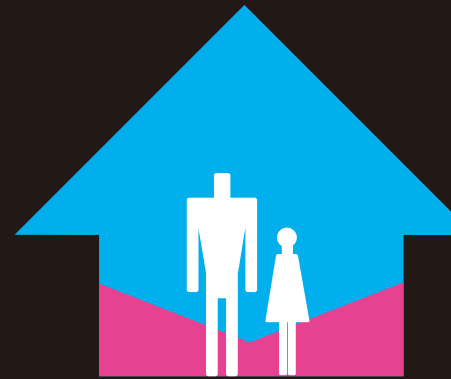


HILL ASEAN Gender Equality Perceptions Survey

Where does the difference in satisfaction come from?

The following pages will look into characteristics of each household type.

TRADITIONAL



22.7%

of total sample

Definition Wife is responsible for household chores, childrearing and other work within the house, and husband is responsible for work and other activities outside the house

Income earner

Around 75% of husbands earn more than wives

Husband earns more **74%**
Only husband earns: 25%

Both earn similar amount **20%**

Wife earns more **5%**
Only wife earns: 0.2%

Evaluation of current situation

Satisfaction with current situation

82% > **64%**

Want division of roles to change

41% < **61%**

Evaluation of partner

87% > **78%**

! Wives' satisfaction with the current division of roles is low and their desire for change is high.

Why are wives not satisfied?

1 There is a large gap between husbands' and wives' perceptions of their roles

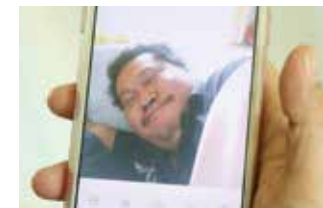
Women should continue to work after marrying	♂ 59%	♀ 74%
Men should help with household chores	♂ 71%	♀ 82%
Men work, women do household chores	♂ 82%	♀ 72%

2 Men's share of household chores is low

Share of 12 household chores	♂ Male	♀ Female
Cooking	25%	67%
Changing diapers	30%	64%
Washing clothes	28%	63%
Staying at home with a sick child	33%	62%
Cleaning the house	31%	60%
Helping children with homework	39%	57%
Buying food	38%	57%
Playing with children at home	42%	53%
Collecting children from school	41%	50%
Planning family recreational activities	49%	48%
Paying bills	60%	38%
Household repairs	66%	23%
Total household chore workload index	♂ 484	♀ 642

* "Other" is omitted from the table

Female - Male **158**



Wife wants him to spend some of his drinking time helping with household chores (Thailand)



Jokingly posted photo of husband who broke a bone while drunk (Thailand)



Works late on weekdays, spends his free time on weekends playing soccer (Indonesia)

TASK-BASED SHARING



50.9%

of total sample

Definition Husband and wife divide household chores, childrearing, education, work, and daily shopping equally

Income earner

89% of wives earn

Husband earns more **65%**
Only husband earns: 10%

Both earn similar amount **24%**

Wife earns more **9%**
Only wife earns: 0.8%

During our home interviews we found many couples that work together



Husband and wife created their own brand (Thailand)



Husband and wife started a business together (Indonesia)



Couple set up online food supplement company together (Malaysia)

Evaluation of current situation

Satisfaction with current situation

90% > **83%**

Want division of roles to change

20% = **20%**

Evaluation of partner

84% < **90%**

! Both parties are highly satisfied with the current situation and strongly desire to continue task-based division of roles.

What is behind the high satisfaction level of both parties?

1 High awareness that men should help with household chores

Men should help with household chores **80%** **86%**

2 Husbands' share of household chores is higher than any other household type

Share of 12 household chores	Male	Female
Cooking	28%	62%
Changing diapers	35%	61%
Staying at home with a sick child	35%	60%
Washing clothes	32%	58%
Helping children with homework	41%	56%
Cleaning the house	35%	56%
Buying food	41%	53%
Playing with children at home	45%	53%
Planning family recreational activities	47%	50%
Collecting children from school	45%	47%
Paying bills	58%	40%
Household repairs	70%	20%

*"Other" is omitted from the table

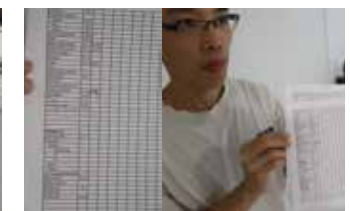
Total household chore workload index **511** **616** **105** (Female - Male)



Ironing and cooking are husband's job (Thailand)



Husband's work is flexible, so he takes care of the laundry and cooking (Malaysia)



Wife manages household chores using a spreadsheet (Singapore)

FLEXIBLE SHARING



24.8%

of total sample

Definition Household chores, childrearing, education, work, and daily shopping are handled by whoever can do it at the time

Income earner

87% of wives earn

Husband earns more **61%**
Only husband earns: 13%

Both earn similar amount **24%**

Wife earns more **13%**
Only wife earns: 2%

Evaluation of current situation

Satisfaction with current situation

83% > **68%**

Want division of roles to change

29% < **30%**

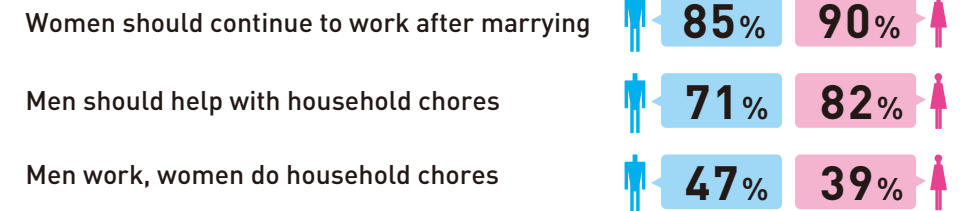
Evaluation of partner

87% > **81%**

! Both parties want to continue being Flexible sharing type, but there is a gap in satisfaction with the sharing arrangements between husbands and wives.

Why is there a gap in their satisfaction?

1 Men of this type have much higher understanding of women



2 However, in reality women bear more responsibility for household chores

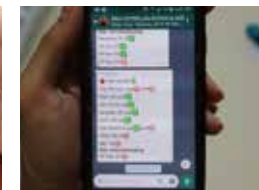
Share of 12 household chores	Male	Female
Staying at home with a sick child	32%	63%
Cooking	25%	62%
Changing diapers	33%	62%
Washing clothes	28%	60%
Helping children with homework	37%	60%
Cleaning the house	31%	56%
Planning family recreational activities	45%	53%
Buying food	41%	53%
Playing with children at home	43%	52%
Collecting children from school	43%	46%
Paying bills	59%	39%
Household repairs	69%	18%

* "Other" is omitted from the table

Total household chore workload index: Male **485**, Female **622**, Difference **137** (Female - Male)



Cooks photo-worthy food only when entertaining (Singapore)



Wife manages monthly tasks using a chat application (Malaysia)

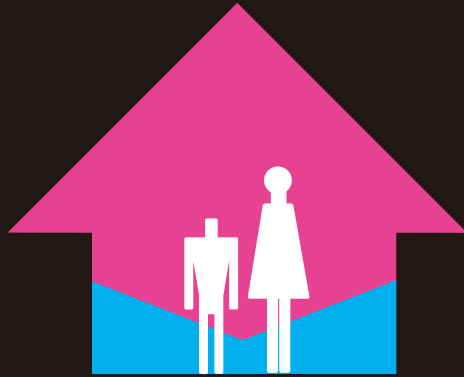


Wife washes the car, too (Indonesia)



Washing the dishes is this husband's specialty (Thailand)

SWITCHED

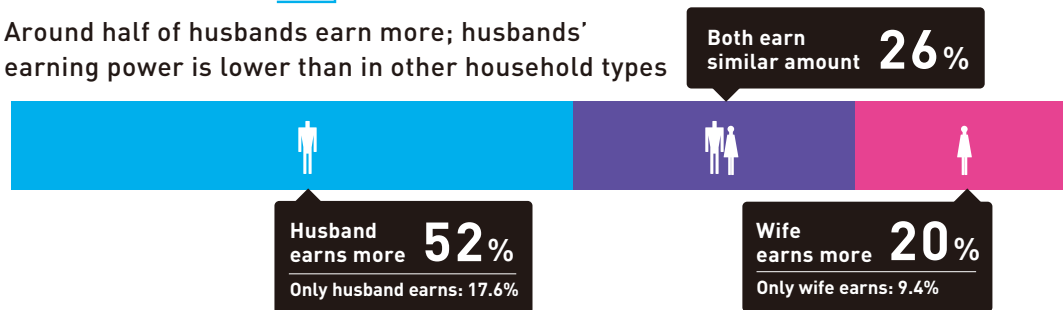


1.5%
of total sample

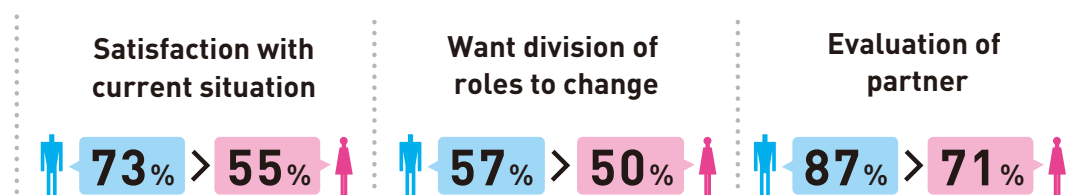
Definition Husband is responsible for household chores, childrearing and other work within the house, and wife is responsible for work and other activities outside the house

Income earner

Around half of husbands earn more; husbands' earning power is lower than in other household types



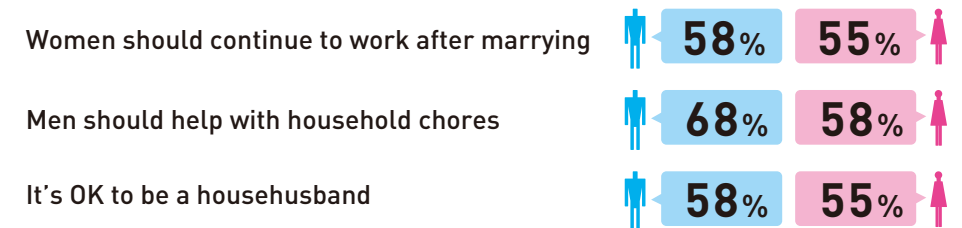
Evaluation of current situation



! Both parties have low desire to continue the Switched division of roles, and wives' satisfaction with the current situation is especially low.

Why do both parties have low levels of satisfaction?

1 They do not fully accept their current roles



2 In reality, women bear more responsibility for household chores

Share of 12 household chores	Male	Female
Washing clothes	27%	61%
Staying at home with a sick child	34%	59%
Cooking	30%	55%
Cleaning the house	31%	55%
Buying food	39%	52%
Changing diapers	32%	51%
Playing with children at home	38%	51%
Planning family recreational activities	46%	49%
Helping children with homework	44%	48%
Collecting children from school	38%	48%
Paying bills	52%	43%
Household repairs	66%	21%

* "Other" is omitted from the table

Total household chore workload index

Men	479	Women	593	Female - Male	114
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Does not want people to know he is a househusband (Thailand)

Supports wife's career by being a househusband (Malaysia)

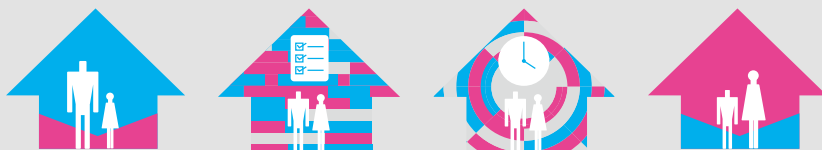
Helps wife out while job-hunting (Vietnam)

Feels obligated to his career-oriented wife who he's been with since they were students (Indonesia)

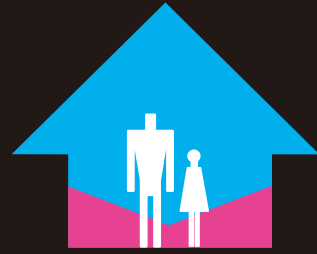
How do the four household types make shopping decisions?



How does division of roles in the household affect purchasing decisions?



TRADITIONAL



22.7%

Definition

Wife is responsible for household chores, childrearing and other work within the house, and husband is responsible for work and other activities outside the house

Purchase decision-making



Purchase categories that more than 50% of our sample make decisions about as a couple: motorcycles, new home and seasonal gifts. Car buying decisions are dominated by husbands, while wives make most decisions about daily necessities.

Category	Husband	Both together	Wife
Car	56.1%	37.1%	6.8%
Motorcycle	43.4%	50.9%	5.8%
Air conditioner	41.3%	42.5%	16.3%
Fridge	26.7%	45.8%	27.5%
Washing machine	23.7%	44.0%	32.3%
TV	35.4%	43.6%	21.0%
Camera	38.6%	40.7%	20.6%
Printer	43.0%	37.2%	19.8%
New home	28.6%	55.7%	15.7%
Financial product	34.2%	44.5%	21.3%
Seasonal gifts throughout the year	21.0%	51.7%	27.4%
Instant foods and beverages	19.6%	34.8%	45.6%
Seasonings	12.9%	24.1%	63.0%
Shampoo	12.0%	26.7%	61.2%
Detergent	12.6%	22.0%	65.4%
Household cleaners	12.2%	23.1%	64.7%
Diapers	11.6%	25.3%	63.0%
Baby care products (except diapers)	12.6%	24.7%	62.7%

Categories with "Both together" scores of 50% or more **3**

Characteristic decision-making processes



Wife wanted a brand → Husband considered cost and functions → Bought different brand for wife, while he uses the latest model (Thailand)



Husband preferred the smart remote control. Bought a TV without asking his wife (Thailand)

TASK-BASED SHARING



50.9%

Definition

Husband and wife divide household chores, childrearing, education, work, and daily shopping equally

Purchase decision-making



This household type has the highest number of purchase categories that couples decide together. There are no husband-dominated categories, while wives only lead in seasonings and cleaning products.

Category	Husband	Both together	Wife
Car	43.7%	50.9%	5.4%
Motorcycle	43.4%	50.9%	5.8%
Air conditioner	31.2%	57.2%	11.6%
Fridge	21.9%	57.0%	21.0%
Washing machine	19.0%	56.9%	24.1%
TV	27.5%	57.6%	14.9%
Camera	30.5%	53.4%	16.0%
Printer	34.3%	52.5%	13.2%
New home	19.8%	47.7%	12.7%
Financial product	25.3%	56.1%	18.6%
Seasonal gifts throughout the year	15.8%	64.3%	19.9%
Instant foods and beverages	15.1%	51.9%	33.0%
Seasonings	11.0%	33.9%	55.1%
Shampoo	9.7%	42.2%	48.1%
Detergent	11.3%	37.7%	51.0%
Household cleaners	12.0%	37.5%	50.6%
Diapers	9.9%	40.9%	49.2%
Baby care products (except diapers)	10.2%	40.8%	49.0%

Categories with "Both together" scores of 50% or more **12**

Characteristic decision-making processes



Learned about process of buying car by herself while seeking advice from husband (Thailand)

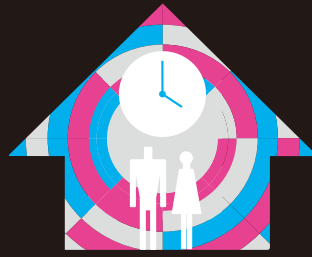


Shared the idea → Husband shortlisted options → Wife checked → Bought the car together (Thailand)



Shared the idea → Husband found it and shared with wife on LINE → Wife approved → Husband bought it (Thailand)

FLEXIBLE SHARING



24.8%

Definition

Household chores, child rearing, education, work, and daily shopping are handled by whoever can do it at the time

Purchase decision-making



Purchase categories where the majority of couples make decision together: electronic goods, new home, financial products and seasonal gifts. Motorcycles are the only husband-dominated category and daily necessities are mostly chosen by wives.

Category	Both together	Husband	Wife
Car	47.2%	46.8%	6.0%
Motorcycle	55.0%	35.1%	9.9%
Air conditioner	34.3%	53.8%	11.9%
Fridge	21.5%	53.4%	25.1%
Washing machine	16.7%	51.5%	31.9%
TV	31.6%	53.5%	15.0%
Camera	37.4%	45.8%	16.8%
Printer	40.9%	43.7%	15.4%
New home	19.9%	49.6%	10.5%
Financial product	25.0%	53.0%	22.0%
Seasonal gifts throughout the year	12.7%	62.6%	24.7%
Instant foods and beverages	13.7%	48.0%	38.3%
Seasonings	8.3%	31.5%	60.2%
Shampoo	6.9%	32.4%	60.8%
Detergent	7.7%	27.4%	64.9%
Household cleaners	9.7%	27.5%	62.8%
Diapers	7.0%	33.5%	59.5%
Baby care products (except diapers)	6.0%	33.1%	60.9%

Categories with "Both together" scores of 50% or more **7**

Characteristic decision-making processes



Shopping is done by the person who has time. Both accidentally bought the same product in different fragrances (Singapore)

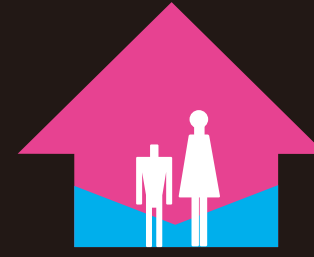


Both selected electronic goods online and made the decision to buy together (Vietnam)



Husband decided the car model, while the wife chose the color (Indonesia)

SWITCHED



1.5%

Definition

Husband is responsible for household chores, childrearing and other work within the house, and wife is responsible for work and other activities outside the house

Purchase decision-making



Purchase categories where the majority of couples make decision together: electronic goods, new home, financial products and seasonal gifts. There are no husband- or wife-dominated categories.

Category	Both together	Husband	Wife
Car	32.9%	49.4%	17.6%
Motorcycle	36.5%	48.2%	15.3%
Air conditioner	24.7%	49.4%	25.9%
Fridge	21.2%	55.3%	23.5%
Washing machine	17.6%	52.9%	29.4%
TV	25.9%	50.6%	23.5%
Camera	21.2%	55.3%	23.5%
Printer	31.8%	47.1%	21.2%
New home	18.8%	57.6%	23.5%
Financial product	23.5%	50.6%	25.9%
Seasonal gifts throughout the year	20.0%	52.9%	27.1%
Instant foods and beverages	21.2%	52.9%	25.9%
Seasonings	17.6%	44.7%	37.6%
Shampoo	8.2%	43.5%	48.2%
Detergent	15.3%	40.0%	44.7%
Household cleaners	14.1%	44.7%	41.2%
Diapers	12.9%	44.7%	42.4%
Baby care products (except diapers)	11.8%	45.9%	42.4%

Categories with "Both together" scores of 50% or more **8**

Characteristic decision-making processes



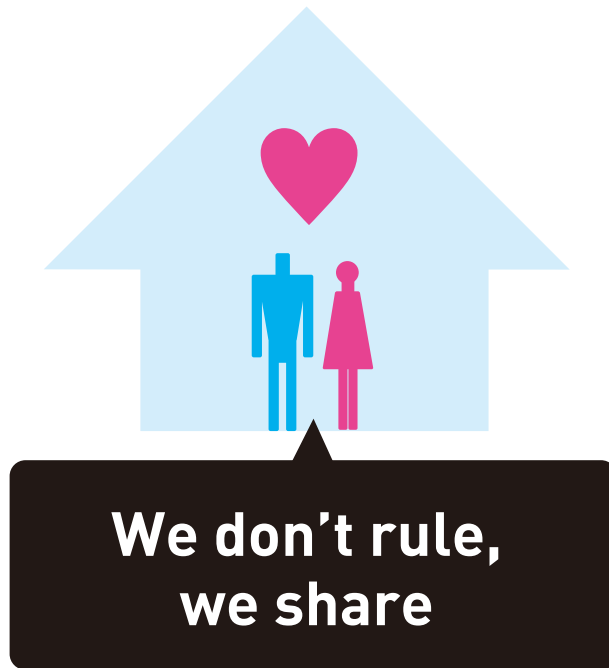
Husband and wife wanted different model. Since, wife drives more often, her decision was final (Indonesia)



Husband jokes with wife about buying a new family car. The wife would rather buy a truck for work, so she let it go in one ear and out the other (Thailand)

Summary of findings

So, who rules the house?



75% of all respondents are in Sharing type

Sharing type are the most satisfied household type in terms of the division of roles

In Sharing type households, husbands cross gender boundaries and actively participate in household chores; many think that this is the ideal arrangement, and most purchasing decisions are made together.

Marketing implications

How should brands adjust their marketing direction for an ASEAN region where most households share roles?

Marketing implication

1

New perspective for targeting strategies

From gender-based targeting to couple-based targeting.

Marketing implication

2

Decision-making process management

From male or female customer journeys to couple journeys.

Marketing implication

3

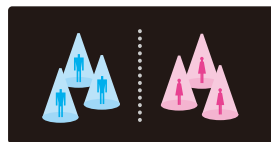
Focus of communication

From focusing on working women to focusing on men who also do housework.

Marketing implication 1

New perspective for targeting strategies

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



Fixed roles based on gender



Only husband or wife makes purchasing decision



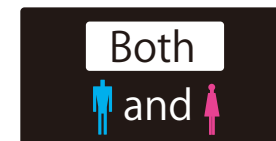
Target only husband or wife



Share roles regardless of gender



Husband and wife make purchasing decisions together

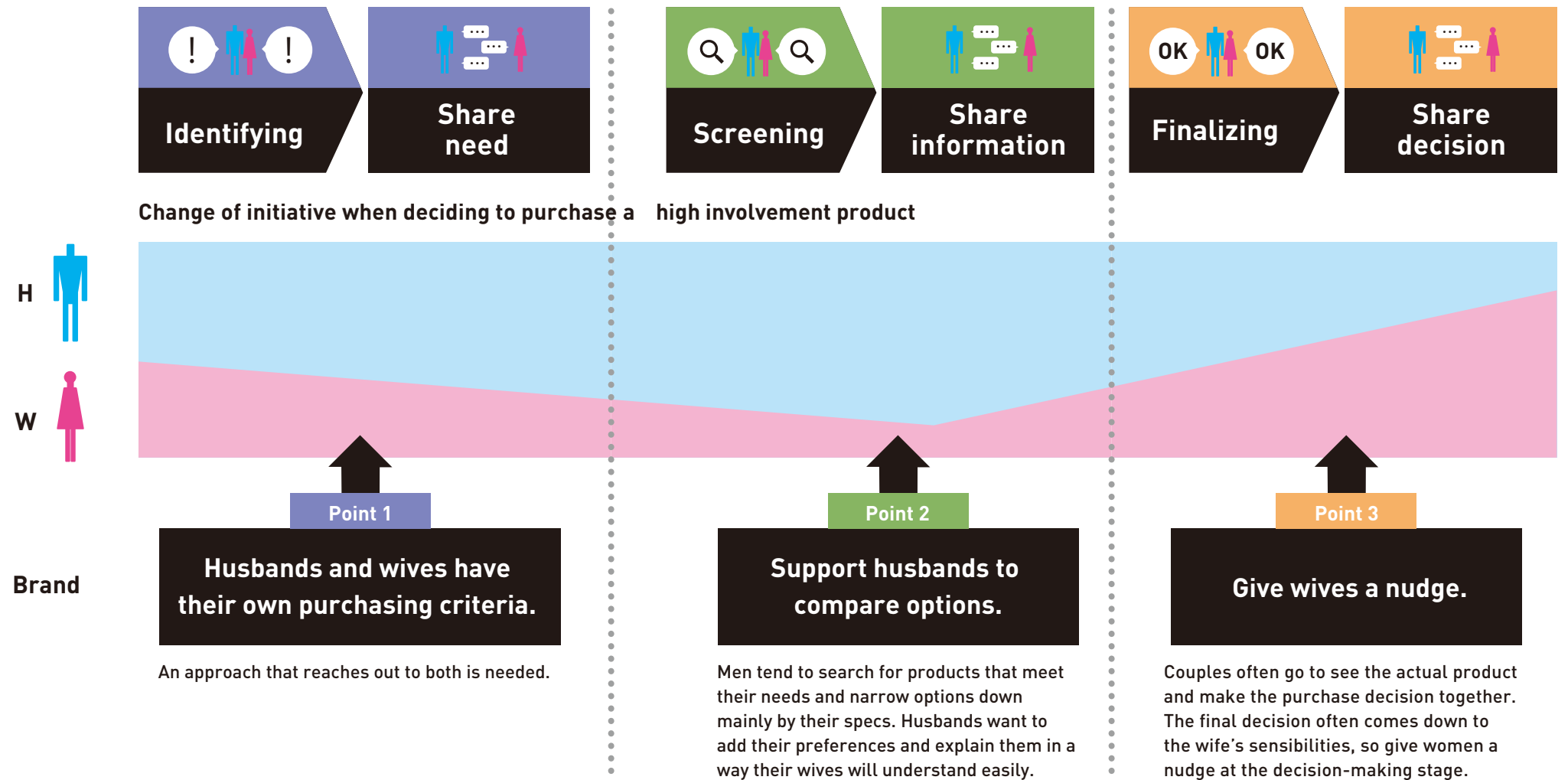


Target the couple (husband and wife)

Marketing implication 2

Decision-making process management

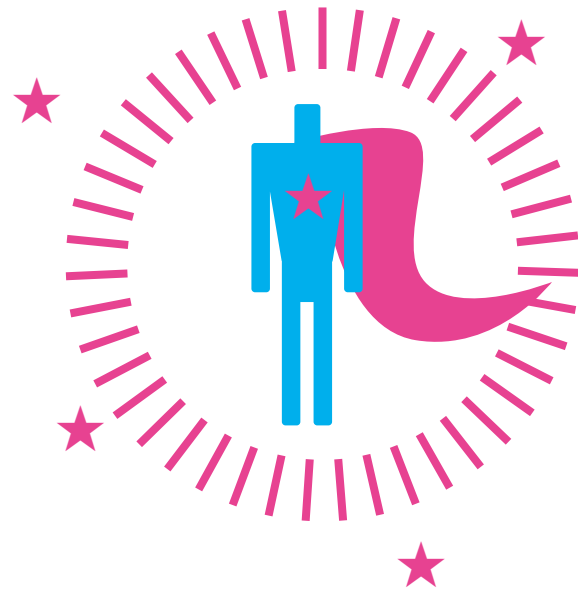
Plotting the decision-making steps couples go through in detail is key. Create a shared customer journey for couples based on who takes the lead in the steps below and what discussions they have together.



Marketing implication 3

Portray “Super Daddies” as heroes

Shine a spotlight on the rise of husbands’ participation in household chores.



Super Daddy = a cool husband who handles work, childrearing and household chores



Super
Daddies



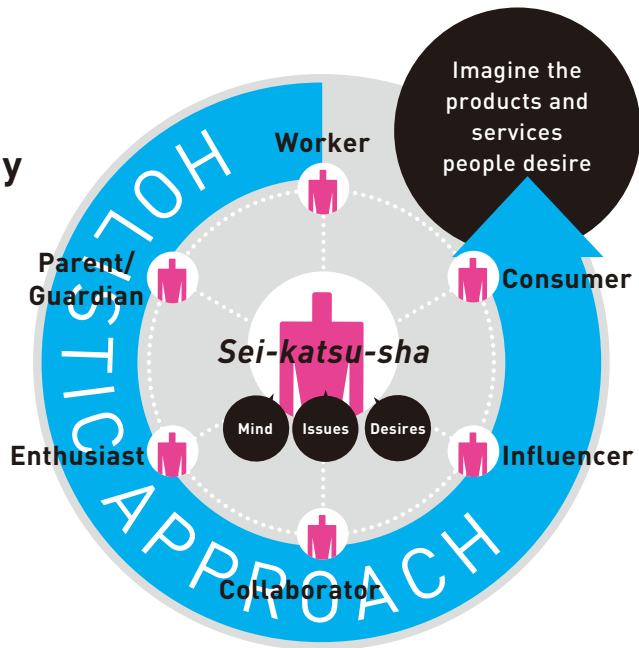
What is HakuHodo Institute of Life and Living ASEAN?

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.

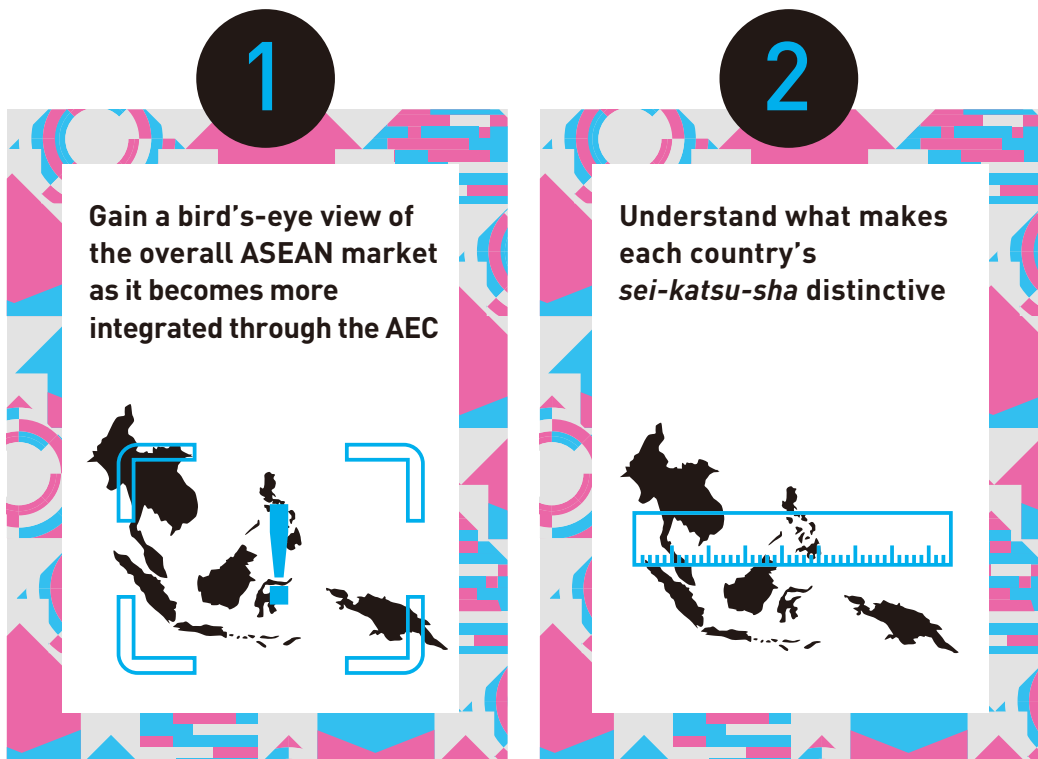
“Consumer” is a producer-centric term that refers only to one facet of people’s lives. Human beings don’t exist solely to consume. They do much more than just shop. They are workers, residents, citizens, somebody’s son or daughter, and perhaps also a parent. At HakuHodo, we use the term *sei-katsu-sha*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



Epilogue

So who rules the house in ASEAN?

Our research on gender equality in ASEAN families lead to many realizations.

Traditional households, where the husband works outside and the wife takes care of the home are now in the minority. The majority of ASEAN households today are Shared and husband and wife both work and share household roles equally.

Couples in these Shared households have high levels of satisfaction with the division of their roles, and the gap between husbands' and wives' satisfaction of roles is relatively small. They also tend to make purchasing decisions together, even when purchasing products like cars and electronic goods.

So what implications do these findings have?

Marketing approaches based on traditional ideas about gender may no longer be the most suitable for today's ASEAN families. New approaches that take account of the reality of working wives, husbands that do household chores, and joint decision-making may be required.

They don't rule, they share.

Survey work, research and presentation

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