

Hakuhodo Institute of Life and Living ASEAN presents ASEAN *Sei-katsu-sha* Studies 2024

A Decade of Shift in ASEAN Families: Weaving Family

Forming original values with advanced behavior style and traditional family conception

Tokyo—June 27, 2023—Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN) held ASEAN SEI-KATSU-SHA FORUM 2024 in Jakarta, Indonesia, announcing findings from surveys and research into the attitudes and behavior of ASEAN *sei-katsu-sha*—Hakuhodo’s term for the holistic person—under the theme of “The ASEAN Family.”

Founded in 2014, HILL ASEAN marks its 10th anniversary this year. In that inaugural year, we also conducted research under the same theme of ASEAN families, presenting our finding that the ASEAN family was enjoying real-time communication by constantly going online, facilitated by the advancement of technology and the rapid expansion of SNS.

Ten years on, we again performed quantitative and home visit surveys in six ASEAN countries (Thailand, Indonesia, Vietnam, the Philippines, Malaysia and Singapore) to see how the ASEAN family has changed over the years. Our findings show the realities of the ASEAN family building its own value on the “family first” principle, striking a balance between “**emerging values**” (newly adopted values in contact with global information and values) and “**traditional values**” (intrinsic ASEAN values being enhanced or recovered by people revisiting their roots).



Highlights of survey

ASEAN and the “family first” principle

Asked about how the importance of family will change in their country, the share of ASEAN *sei-katsu-sha* who anticipate an “increase in importance” exceeds that of their Japanese counterparts by almost 30 points.

“Emerging values” in the ASEAN family (newly adopted values in contact with global information and values)

Improved career consciousness

Asked about their image of “ideal men/women,” the shares of both male and female *sei-katsu-sha* in ASEAN who cited “a man/woman oriented to be successful in his/her career” rose over 10 points vs. 10-years-ago.

Family size tending from expansion to contraction

More than 60% of ASEAN *sei-katsu-sha* predict that there will be fewer children and fewer family members living in one household going forward.

Respect for personal liberty

ASEAN *sei-katsu-sha* who want more time to spend alone and those who want more freedom have increased substantially over the 10 years.

“Traditional values” in the ASEAN family (intrinsic ASEAN values being enhanced or recovered by people revisiting their roots)

Power balance in family

In ASEAN countries, husband tends to have more authority than in Japan. People are maintaining order and the relationship of mutual aid by articulating hierarchy among family members.

“Family first” as basis for social trust

In ASEAN, almost 70% of the respondents believe that people who have a good relationship with their family are more likely to be a “good person.” Since having a good family serves as evidence of a good person or social trust, people tend to act with the intention to make their family better, or look better.

Image of the ASEAN family: from Connected Family to Weaving Family

The development and dissemination of technology provides ASEAN *sei-katsu-sha* with opportunities to make contact with the cultures and values of various countries, effectively enabling them to pick “emerging values” to be embraced and “traditional values” to be cherished.

This year’s research helped us find out the new, resilient values and lifestyles of the ASEAN family, weaving different values on the basis of their long-held “family first” principle. The set of values woven into a unique pattern by each family depending on their priorities, also serves to consolidate and protect family members amid the volatile ASEAN society.

Characteristics of Connected Family in 2014 and Weaving Family in 2024

Concept put forward in 2014 “Connected Family”		Concept put forward in 2024 “Weaving Family”
Technology helps expand the concept of “family.” <i>Sei-katsu-sha</i> are connected with ever wider family members and external information, constantly sharing joy and happiness to get through their life.	Characteristics of the ASEAN family	The concept of “family” is contracted to mean closer ties with limited number of members. Curate essential traditions and innovations for weaving one’s own values to survive in modern society.
Expanded use of social media, always connected, social insecurity	Context	Further economic growth, COVID-19, continued social insecurity
Outward-looking: Expanding their world to get more connections. Intent on getting more outside information to enrich their values and lifestyles.	Direction of <i>sei-katsu-sha</i>	Inward-looking: Revisiting the absorbed/adopted values and behaviors, in order to pick what is truly necessary or to get back to traditional values of one’s own country or religion.
Contact with more people to increase the number of “family” member to share joy and extend mutual help.	Family design	Select family members worthy of affection and time to focus mutual support on a “smaller but stronger family.”
Capable of showing that family members love and connect each other to be happy together.	Ideal image of family	Capable of presenting themselves as a unique and creative family.
Keep up-to-date with information through social media.	Method	Remix traditions and new values and communicate through social media.

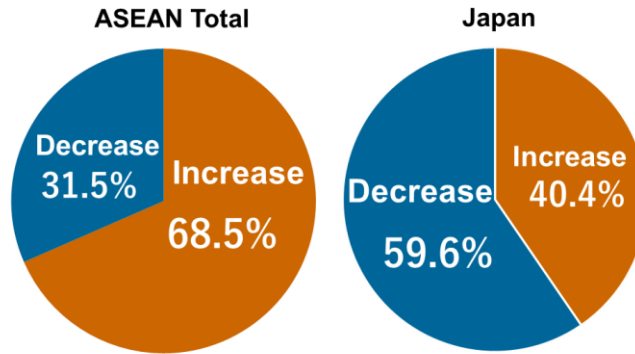
The flexibility of rebuilding values or revisiting/reevaluating traditional values while embracing new concepts is one of the characteristics of ASEAN *sei-katsu-sha*. We at HILL ASEAN are of the view that this trend of mixing emerging and traditional values will continue into the future.

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ASEAN and the “family first” principle

- Asked about how the importance of family will change in their country, the share of ASEAN *sei-katsu-sha* who anticipate an “increase in importance” exceeds that of their Japanese counterparts by almost 30 points.

Expected changes in family in one’s own country: Importance of family



Source: “ASEAN Family Quantitative Survey 2024,” HILL ASEAN

“Emerging values” in the ASEAN family

Improved career consciousness

- Asked about their image of “ideal men/women,” the shares of both male and female *sei-katsu-sha* in ASEAN who cited “a man/woman who places his/her family above all other concern” fell over the 10 years, while those citing “a man/woman oriented to be successful in his/her career” rose over 10 points among both men and women.
- The share of ASEAN *sei-katsu-sha* wishing “to succeed with my job than with family” increased some 7 points over the 10 years.

Image of ideal men/women

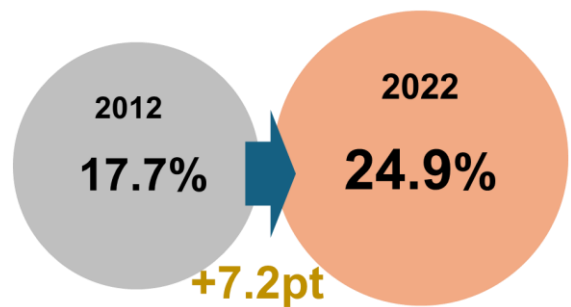
A man/woman who places his/her family above all other concern	2012	2022
Female	56.3	41.5
Male	47.2	39.3

Change
-14.8
-7.9

A man/woman oriented to be successful in his/her career	2012	2022
Female	15.4	28.8
Male	20.0	36.4

Change
13.4
16.4

To succeed with my job than with family



Source: “Global HABIT 2012/2022,” Hakuodo

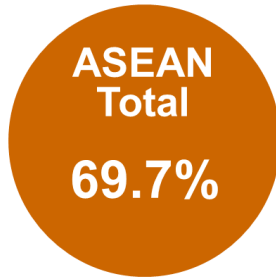
Source: “Global HABIT 2012/2022,” Hakuodo

Family size tending from expansion to contraction

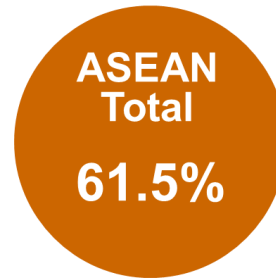
- Asked about future changes in family structure in their country, more than 60% of ASEAN *sei-katsu-sha* predict that there will be fewer children and fewer family members living in one household.

Expected changes in family structure in one's own country

There will be fewer children



There will be fewer family members living in one household

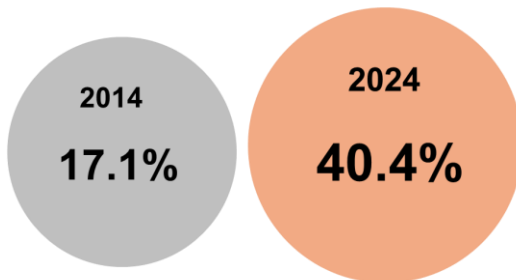


Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

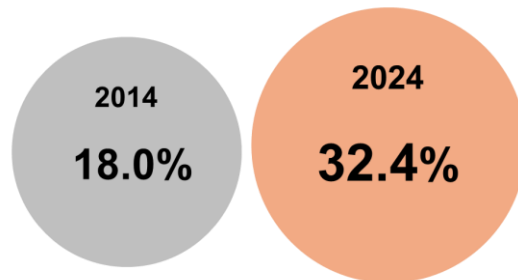
Respect for personal liberty

- ASEAN *sei-katsu-sha* who want more time to spend alone and those who want more freedom have increased substantially over the 10 years.

Things you want to spend more time doing
Spending time alone



Things you want (up to three)
Freedom



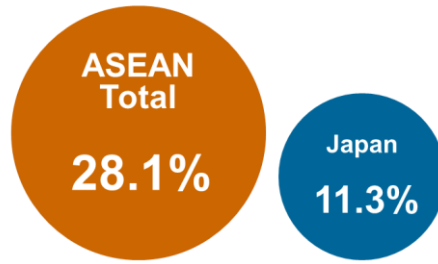
Source: "Chronological Lifestyle Survey on *Sei-katsu-sha* 2014/2024," Hakuho Institute of Life and Living
*2014 data are presented for reference purposes only, due to differences in methodology.

Traditional values" in the ASEAN family

Family as promise of the future

- In ASEAN, 28.1% of the people say: "I carefully plan and prepare for my own and my family's future"—a percentage that exceeds the share in Japan by over 15 points. The result indicates that people place more importance on mutual aid among family members in ASEAN countries, largely due to insufficiencies in social security.
- Indeed, being financially ready is the most important reason/trigger for ASEAN people to have their own family.

Because society is unstable, I carefully plan and prepare for my own and my family's future.



Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

What were the most important reason(s)/ trigger(s) for you to have your own family?
 (Single selection, top 5)

*Those unmarried: Reason(s)/trigger(s) that make you want to get married/have a family

ASEAN Total		(%)	Japan	
Financially ready	13.9	1	Want to extend compassion/love to other	16.7
Show respect/commitment to partner	11.9	2	None/Don't know	16.5
Want to extend compassion/love to other	10.6	3	Want/Need to depend on a partner	9.7
Want to be legally bound/have legal rights for each other	10.3	4	Want to be legally bound/have legal rights for each other	8.0
Want freedom/independence from own family	6.9	5	Want to extend compassion/love to other	7.5

Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

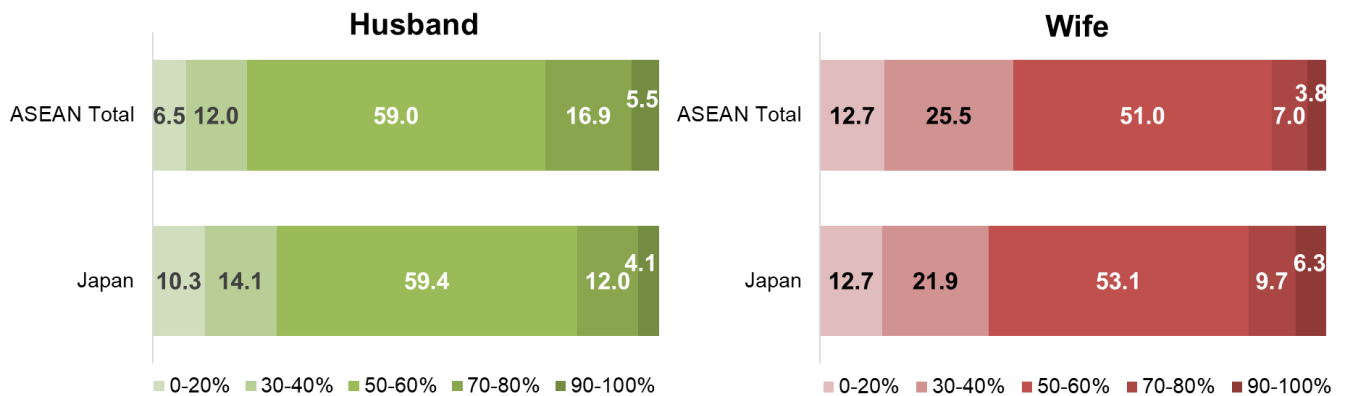
Power balance in family

- A question on the balance of authority and decision-making power between husband and wife revealed that in ASEAN countries, husband tends to have more authority than in Japan.
- Asked about who they seek for direction in making decisions, almost 70% of the respondents cited parents, the most popular choice. While children are supposed to respect and take care of their parents after retirement, parents are also required to provide good guidance for their children. Indeed, this mutual-aid relationship with a role to be played by each member is an essential ingredient of harmonious ASEAN society and family.

Balance of authority and decision-making power in family between husband and wife

Q) Based on a total of 100%, what is the current distribution between husband and wife in terms of "authority" or "decision-making power" within your family?

*If you are SINGLE, please input the distribution between your FATHER and MOTHER.



Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

When you make important life decisions, who do you seek for direction? (Multiple selection, top 5)

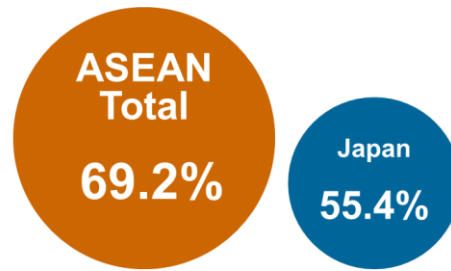
ASEAN Total		(%)	Japan	
Parents	69.8	1	Husband/Wife/Partner	66.0
Husband/Wife/Partner	69.1	2	Parents	39.6
Friends	44.2	3	None/Don't know	18.1
God	44.2	4	Friends	15.7
Counselors/Life coaches/Teachers	22.9	5	Own children	14.6

Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

"Family first" as basis for social trust

- In ASEAN, almost 70% of the respondents believe that people who have a good relationship with their family are more likely to be a "good person." Since having a good family serves as evidence of a good person or social trust, people tend to act with the intention to make their family better, or look better.
- Asked about the things that they would like to pass down to the next generation, most of the respondents in ASEAN cited "family values and traditions, followed by "religious practices." Whereas efforts to develop a good person or family in Japan tend to focus on education for inculcating ethical values such as not to be a nuisance to others, ASEAN people place priority on passing family traditions or values and religious practices on to the next generation.

I believe people who have a good relationship with their family are more likely to be a "good person."



Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

What are the things you would like to pass down to the next generation? (Top 5)

ASEAN Total		(%)	Japan	
Family values and traditions	21.5	1	None/Don't know	34.1
Religious practices	21.2	2	Culture/race/ethical practices	16.3
Educational and intellectual knowledge	18.6	3	Educational and intellectual knowledge	15.1
Culture/race/ethical practices	17.4	4	Family values and traditions	12.1
Family wealth/business	7.5	5	Languages	7.3

Source: "ASEAN Family Quantitative Survey 2024," HILL ASEAN

Outline of research

HILL ASEAN "ASEAN Family Quantitative Survey 2024"

Methodology: Online survey

Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore, Japan

Target population: Males and females aged 20–49, SEC A–C, 4,900 samples in total

Survey period: January 2024

HILL ASEAN "ASEAN Family Qualitative Survey 2024"

Methodology: Home visit survey

Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore

Target population: Males and females aged 20–49, 36 samples in total

Survey period: October–November 2023

Reference data

Hakuhodo Institute of Life and Living "Chronological Lifestyle Survey on Sei-katsu-sha 2024"

Methodology: Online survey

Survey area: ASEAN (Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore)

Japan (Greater Tokyo/Hanshin areas), China (Beijing, Shanghai, Guangzhou)

*This report only uses data from ASEAN.

Target population: Males and females aged 15–59, 1,000 samples per area

Survey period: January 15–31, 2024

Hakuhodo Institute of Life and Living “Chronological Lifestyle Survey on *Sei-katsu-sha* 2014”

Methodology: Home visit survey

Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore, Myanmar

*This report only uses data from Thailand, Indonesia, Malaysia, Philippines, Vietnam and Singapore.

Target population: Males and females aged 15-59, 7,100 samples in total

Survey period: December 2013–January 2014

Hakuhodo “Global HABIT 2022”

Methodology: Home visit survey (Online survey only for Singapore)

Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore, India

*This report only uses data from Thailand, Indonesia, Malaysia, Philippines, Vietnam and Singapore.

Target population: Males and females aged 15–54, 800 samples per area

(except Singapore with 500 samples)

Survey period: Late August–early November 2022

Hakuhodo “Global HABIT 2012”

Methodology: Home visit survey

Survey area: Thailand, Indonesia, Malaysia, Philippines, Vietnam, Singapore

China, Hongkong, Taiwan, Korea, India, Germany, Brazil

*This report only uses data from Thailand, Indonesia, Malaysia, Philippines, Vietnam and Singapore.

Target population: Males and females aged 15–54, 800 or 500 samples per area

Survey period: June–August 2012

■ About Hakuhodo Institute of Life and Living ASEAN (HILL 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*.

Location: Bangkok, Thailand

Research & other activities: Research and analysis from the local perspectives of each ASEAN nation and organization of forums in ASEAN countries.

Details of the findings of this study, commentary on the research content and implications for marketing can be found on a dedicated page on the HILL ASEAN website: <https://hillasean.com/>.

■ About Hakuhodo

Founded in 1895, Hakuhodo is an integrated marketing solutions company headquartered in Tokyo, Japan. With offices in 20 countries and regions, and over 10,000 specialists working in Japan and around the world, the company is the core agency of Hakuhodo DY Holdings, one of the world's top 10 largest agency companies according to *Ad Age's* “Agency Report 2024.”

Sei-katsu-sha insight is the foundation for Hakuhodo'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. Hakuhodo introduced this term in the 1980s to emphasize its commitment to a comprehensive, 360-degree perspective on consumers' lives.

With *sei-katsu-sha* insight as its cornerstone, Hakuhodo combines creativity, integrative capabilities, and data and technology to play a leading role in evolving companies' marketing activities and generating innovation for the completely digitalized era. This enables the company to impact and provide value to *sei-katsu-sha* and society.

Renowned for its creativity, Hakuhodo has won the Grand Prix at Cannes Lions International Festival of Creativity twice, and was named Network of the Year at ADFEST 2021.

To learn more, visit: www.hakuhodo-global.com