

Hakuhodo Institute of Life and Living

Japanese Youth: 30 Years of Change

Mothers and same-gender peers
to drive Gen Z

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HILL Summer Seminar 2024

Japanese Youth: 30 Years of Change

Mothers and same-gender peers to drive Gen Z

Part 1: True or false? Conventional wisdom about youth

Part 2: Gen Z driven by mothers and same-gender peers

Part 3: How companies might develop relationships with Gen Z





Part 1

True or false? Conventional wisdom about youth

Survey design

1994 survey

2024 (present) survey

Samples

1,000 single males and females aged 19–22

600 single males and females aged 19–22

+

200 males and females aged 49–52

Target area

40 km area around Tokyo

40 km area around Tokyo

Method

Door-to-door placement of
self-administered questionnaire

Door-to-door placement of
self-administered questionnaire

Period

January 7–24

January 11–February 26

Analytical framework of the survey

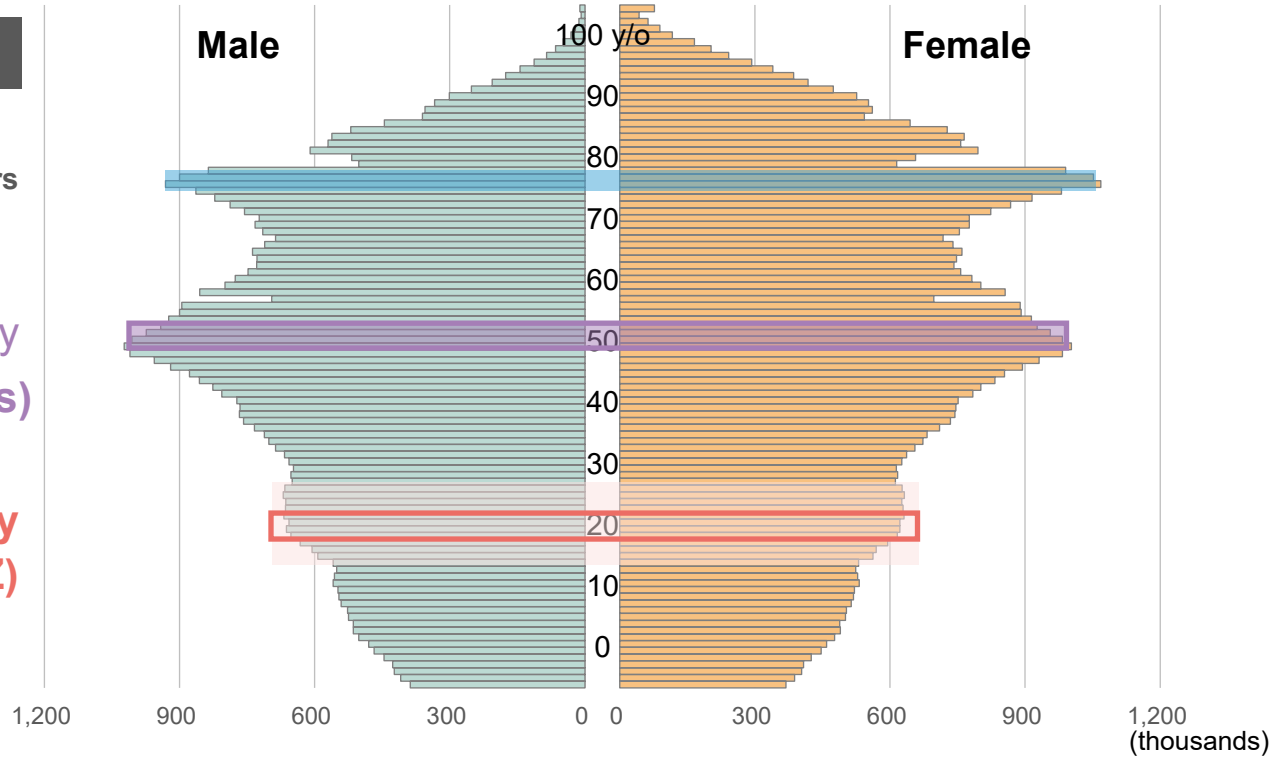
Japan's population pyramid

(October 2023)

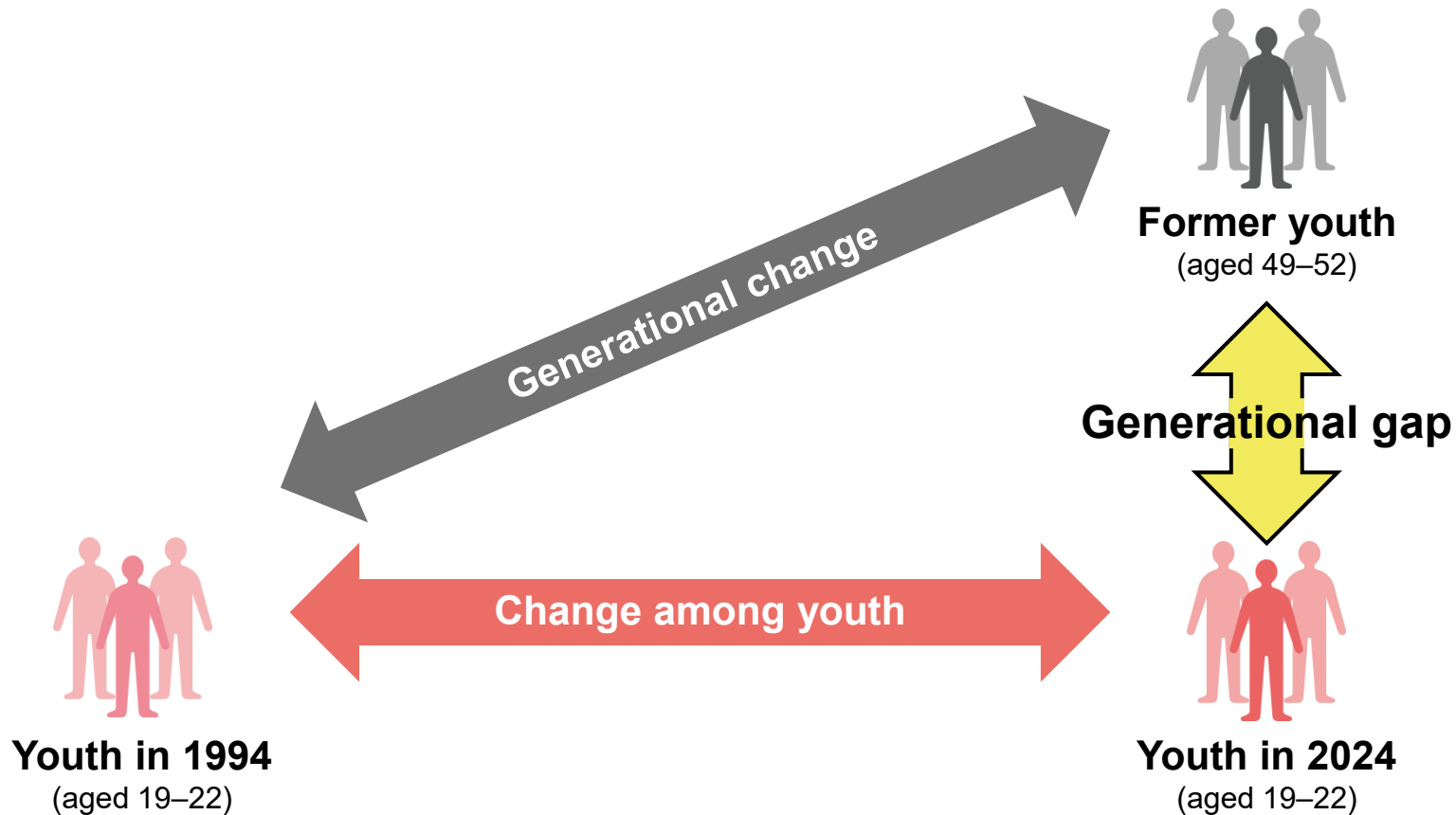
*Baby-boomers

Target of 1994 survey
(Children of baby-boomers)

Target of 2024 survey
(Gen Z)



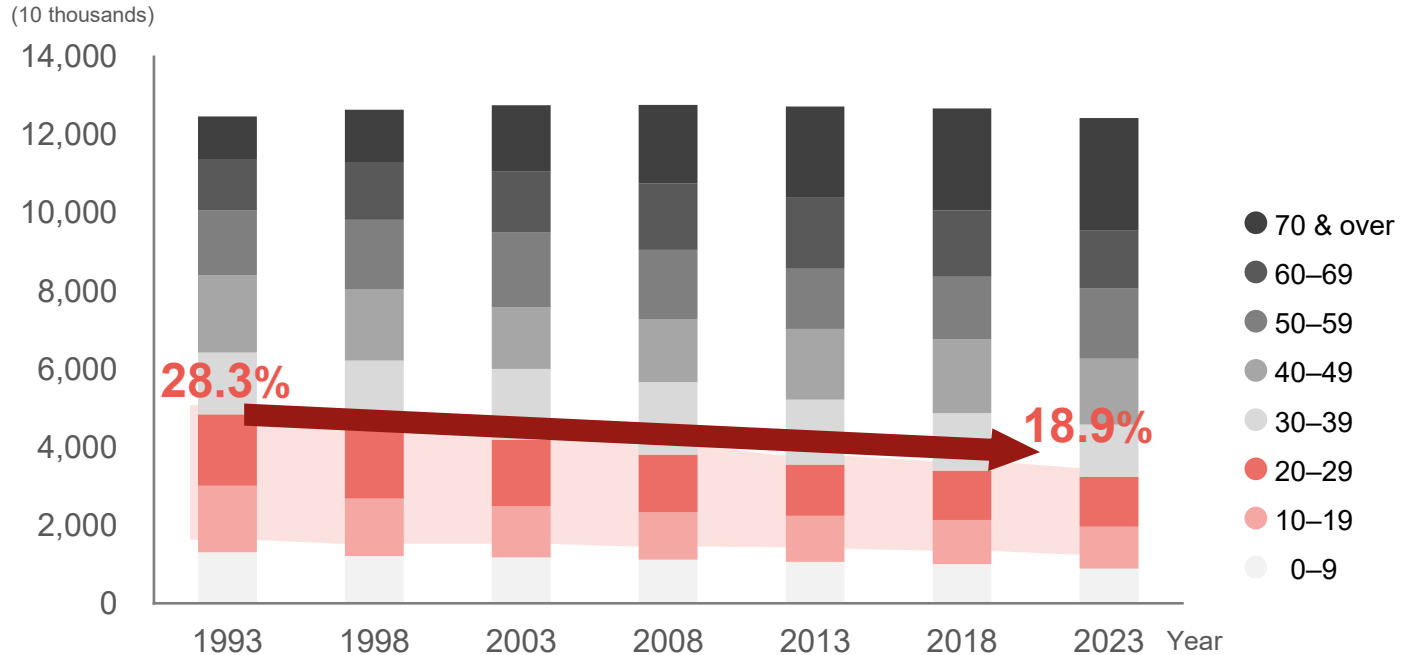
Analytical framework of the survey



Changing environment
surrounding youth

Youth in a minority

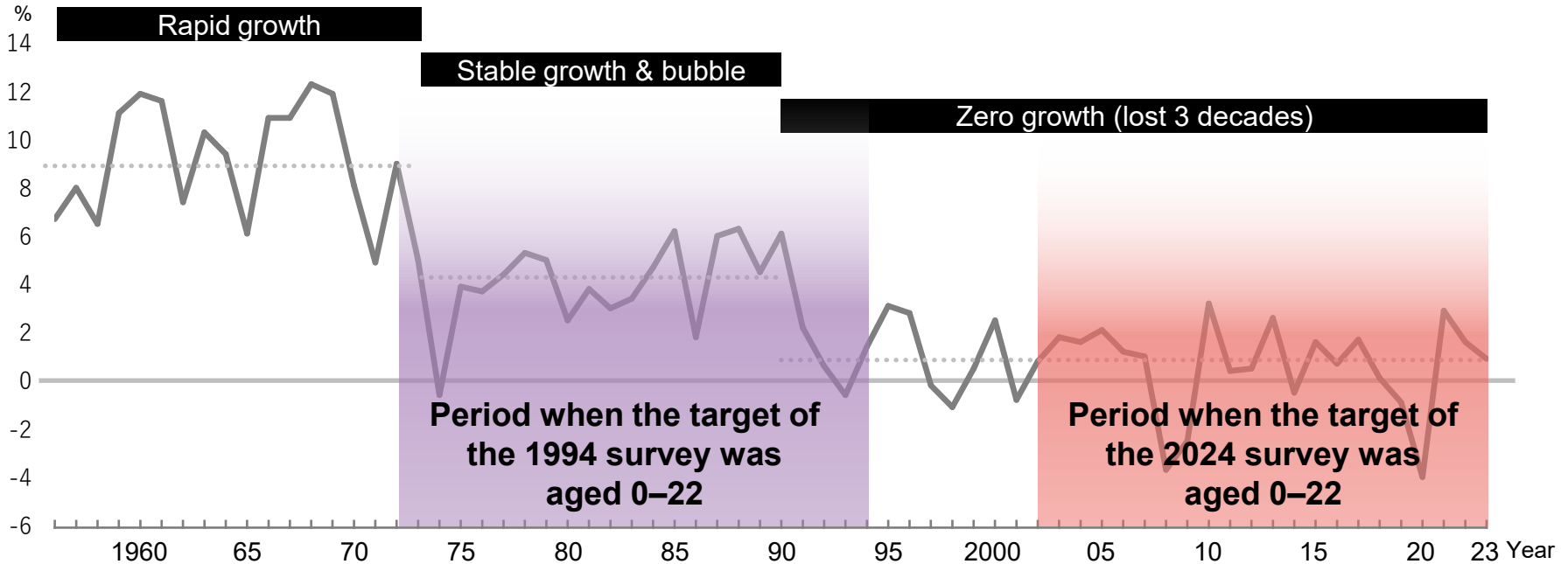
Total population by age group



Changing environment
surrounding youth

Youth growing up during the “lost 3 decades”

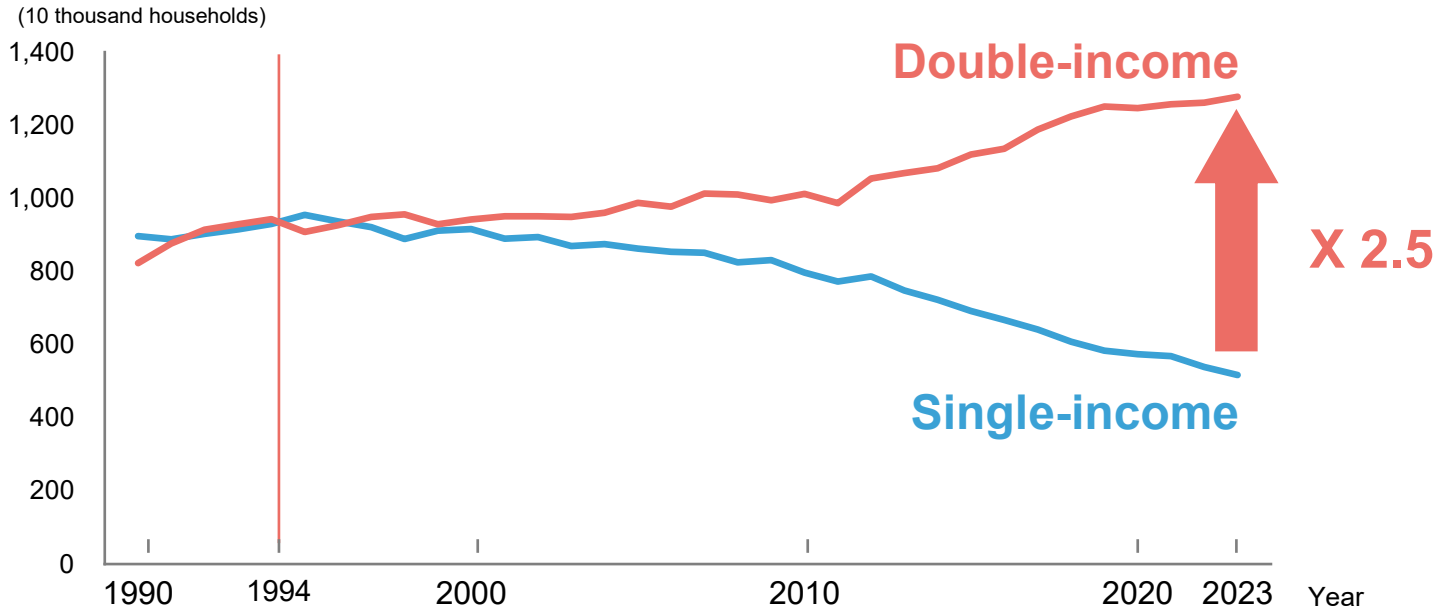
Growth of the Japanese economy



Changing environment
surrounding youth

Youth growing up watching working mothers

Single-income and double-income households

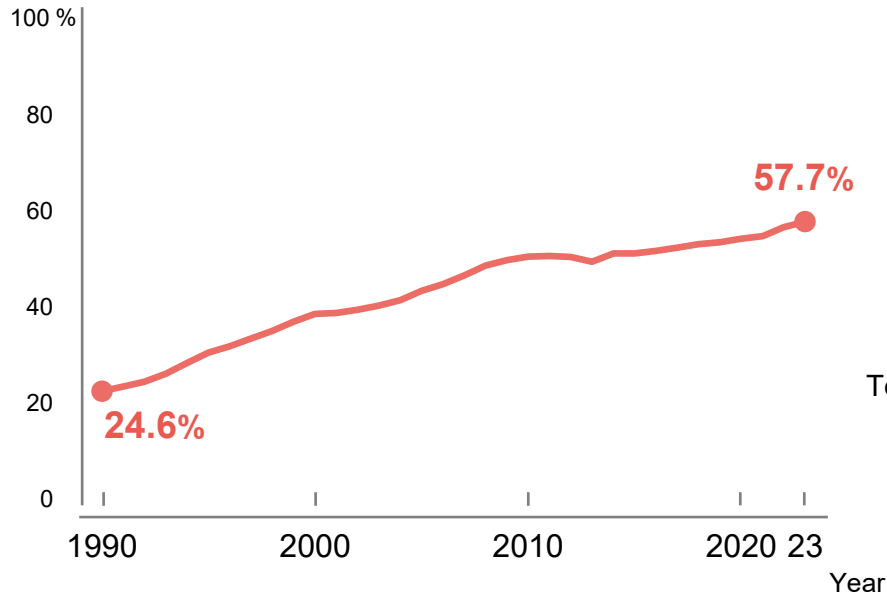


Source: Statistics Bureau of Japan, Ministry of Internal Affairs and Communications "Labour Force Survey"

Changing environment
surrounding youth

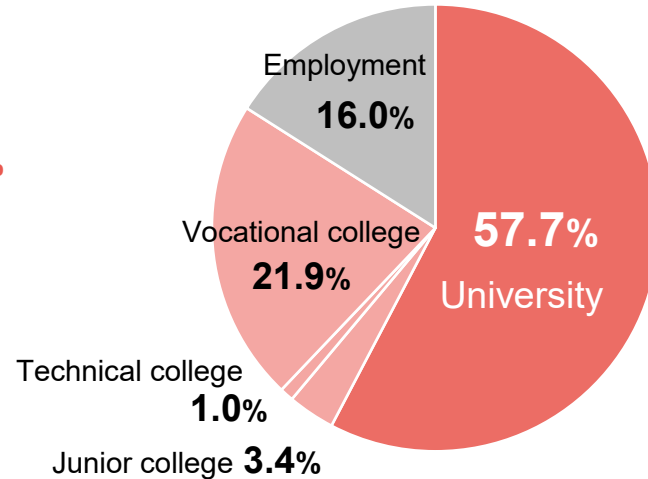
Youth learning longer

University-going rate



Post-secondary education

(as of March 2023, including junior high school graduates)



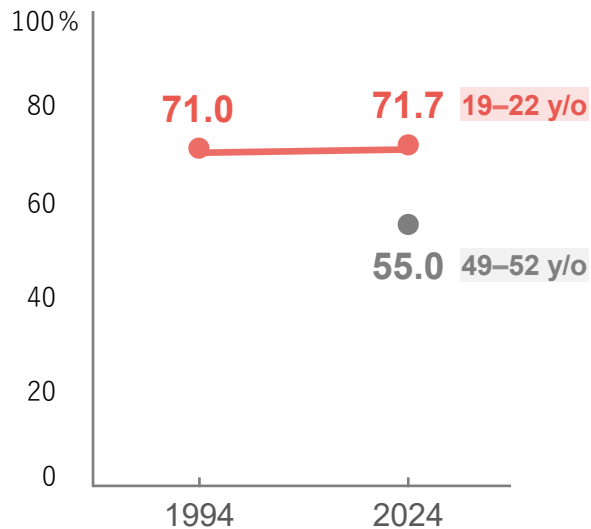


“Constant” Image of Youth

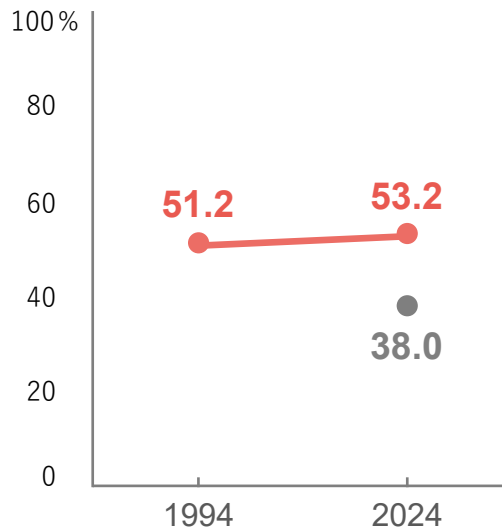
Universal characteristics of young people

that have not changed over the years

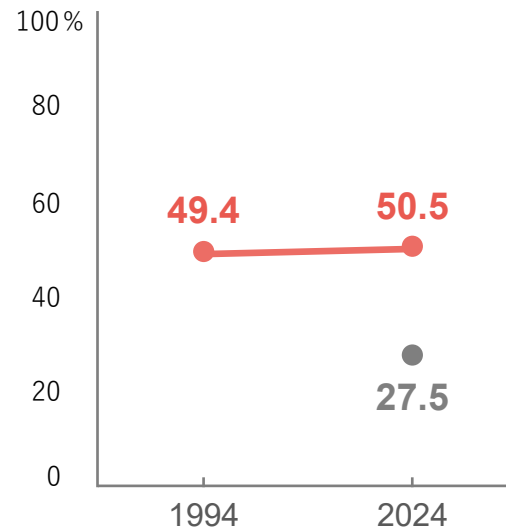
Interested in movies



Picky about what to wear



Better informed about hair styles

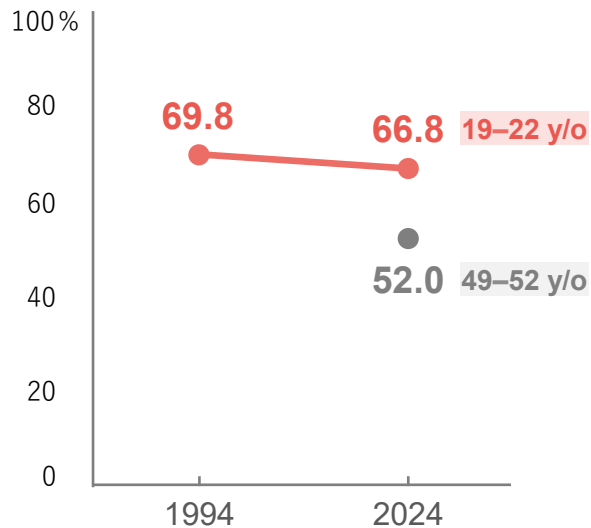


Young people have always been...

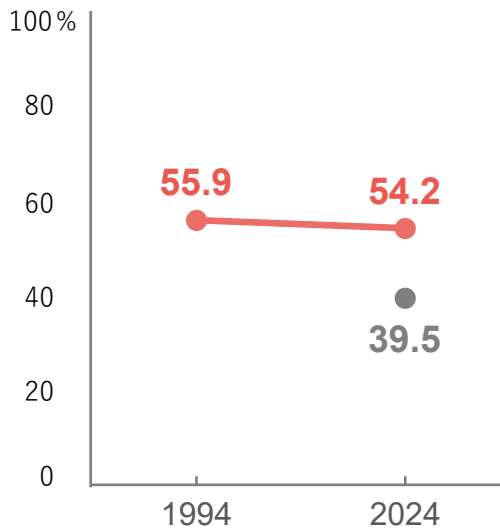
Sensitive to content, fashion, beauty

Behavior

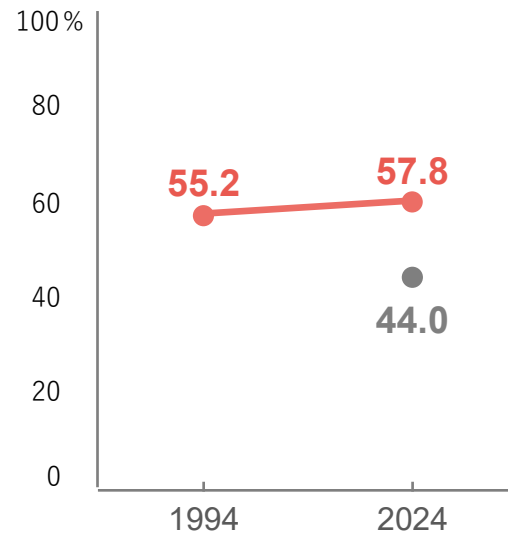
Try everything I'm interested in



Frequent impulse buyer



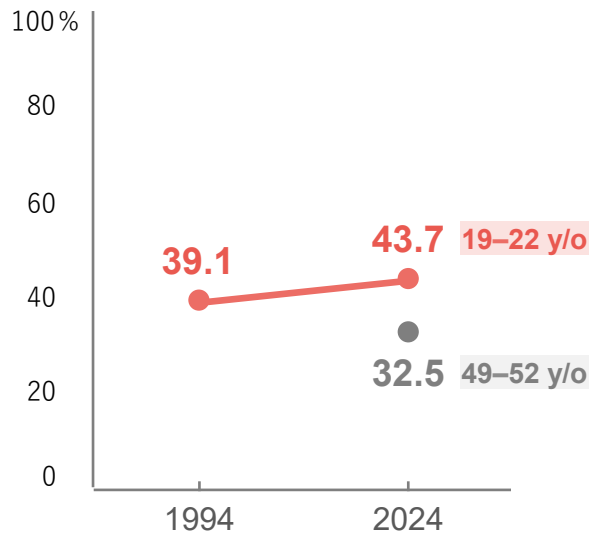
Enjoy now rather than prepare for the future



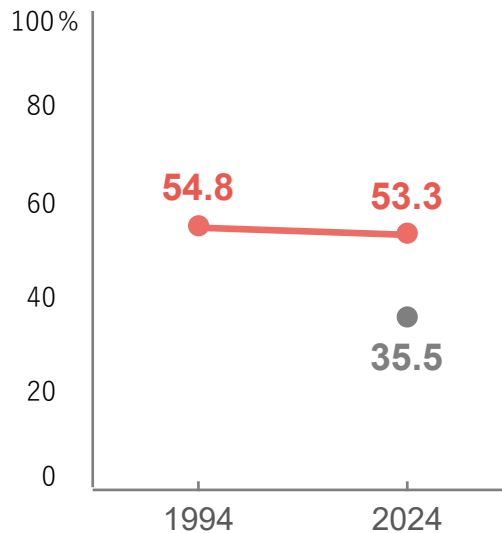
Young people have always...

Enjoyed the present and followed their interests

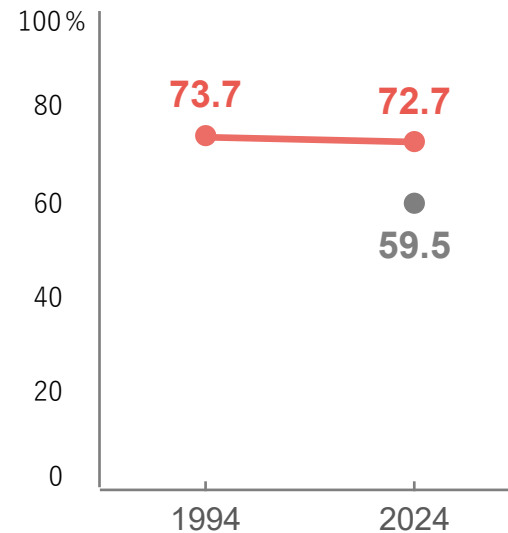
Conscious of trends



Appearance matters when selecting what to buy



Selective about design

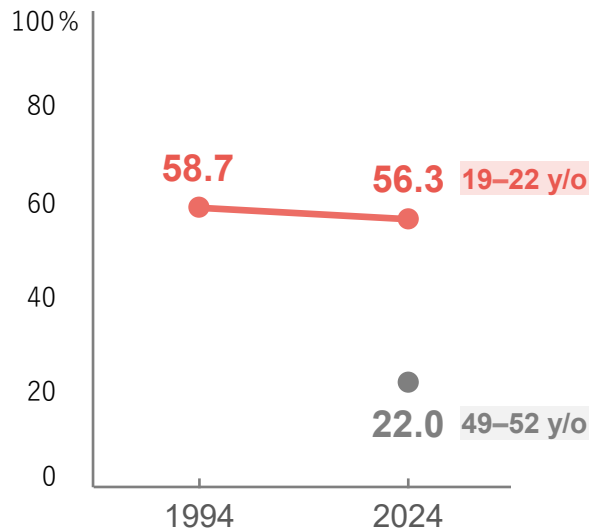


Young people have always been...

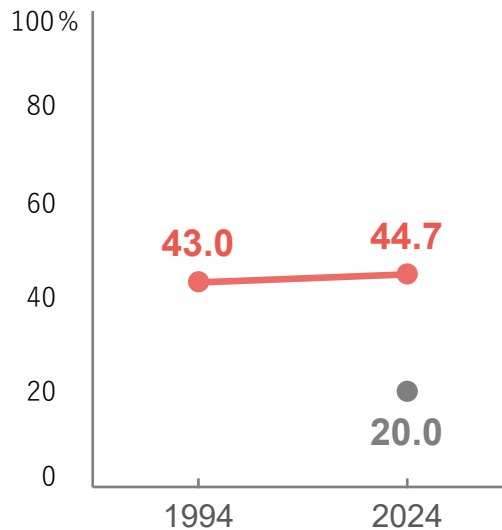
Conscious of trends and looks

Relationships

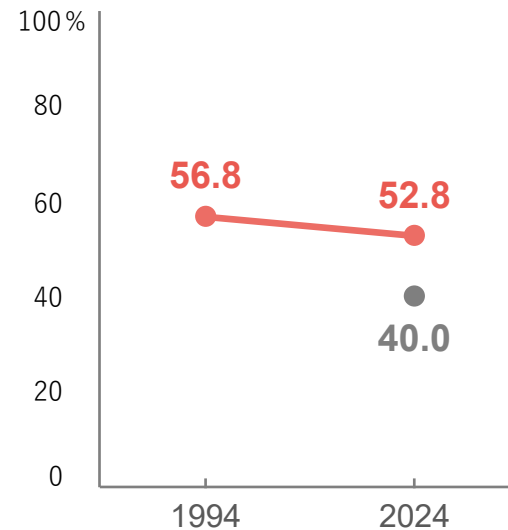
Tend to do things with friends



Have a place to hang out with friends



I can make friends with anyone



Young people have always...

Wanted to hang out with others

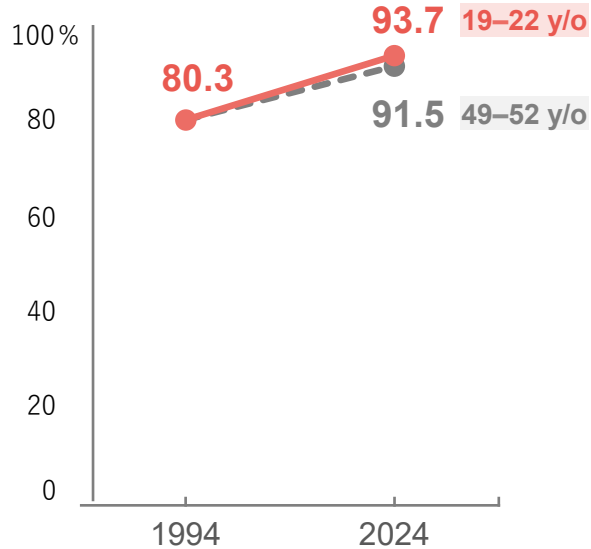


“Non-Unique” Image of Youth

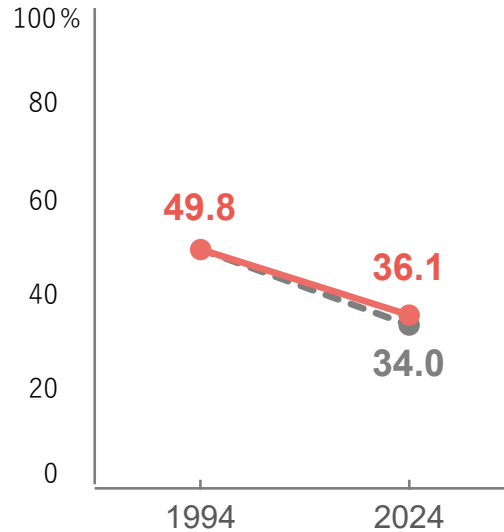
Characteristics of people in general today

including older generations

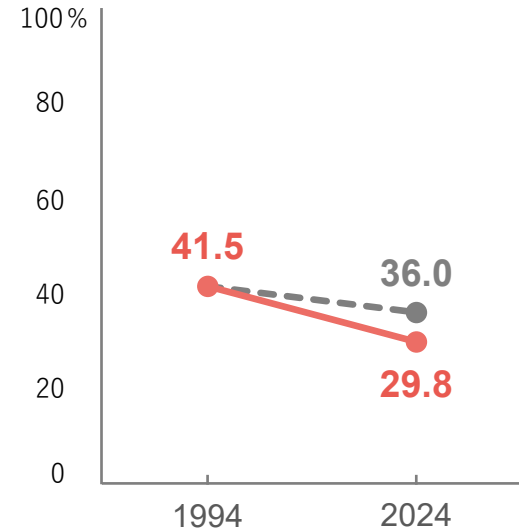
Hard-working women look great



Being a man somehow restrains me



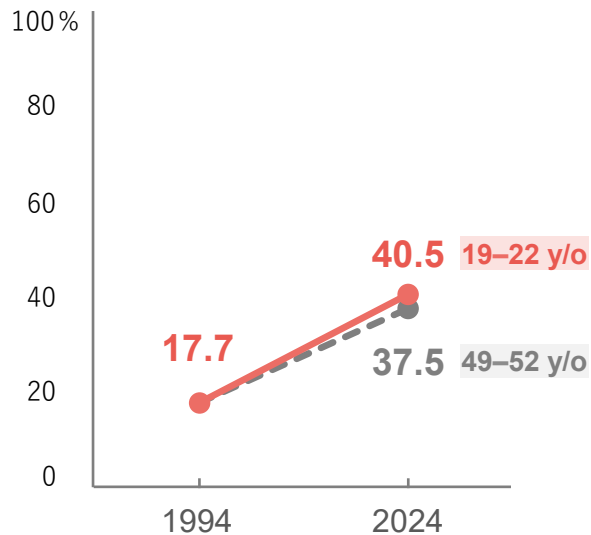
Being a woman somehow restrains me



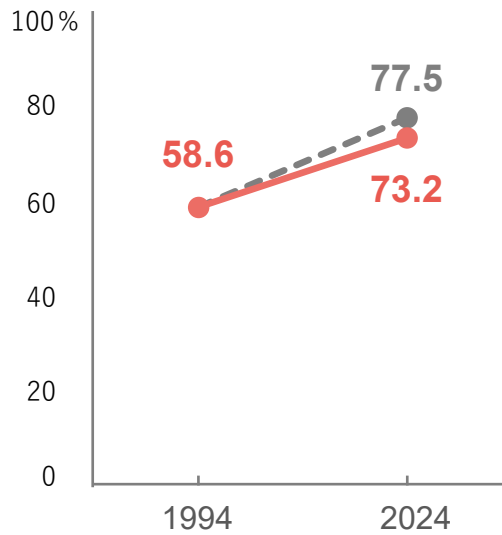
Nowadays, young and older people...

Are not particular about masculinity and femininity

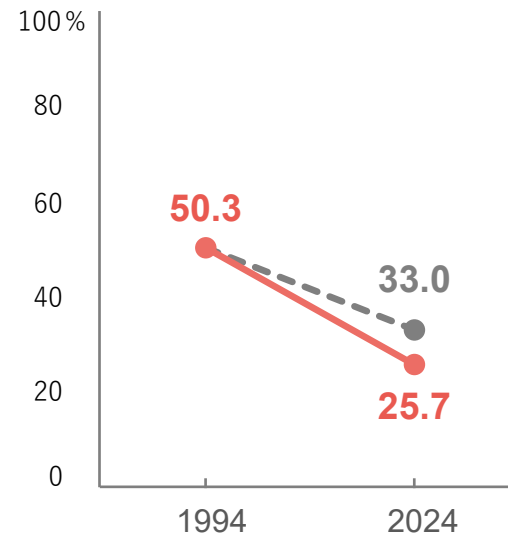
Happy to do only what seems possible to me



It's better to remain in a comfortable position



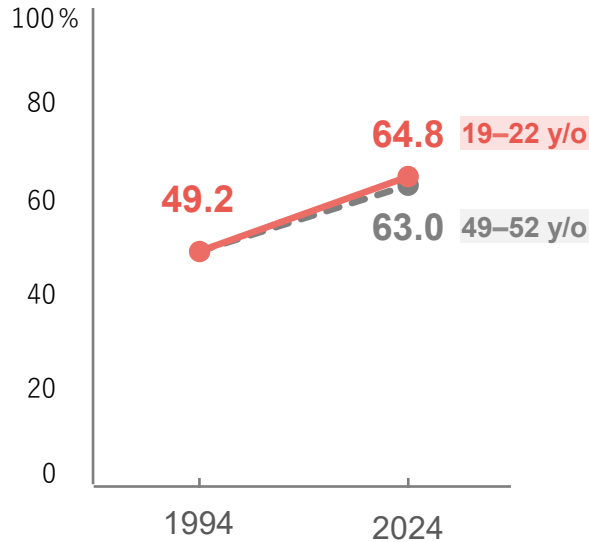
It's better when everything is up to me at work



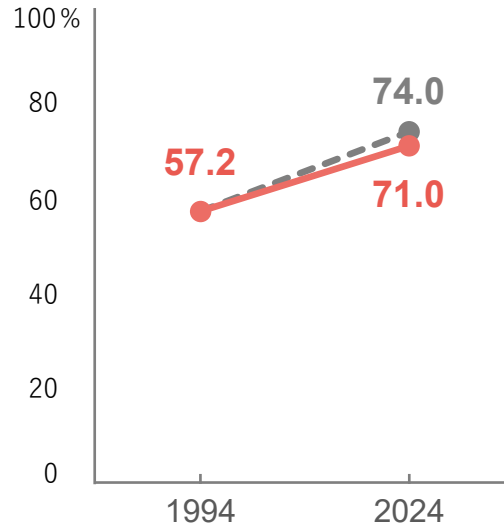
Nowadays, young and older people...

Want to work without trying to impress

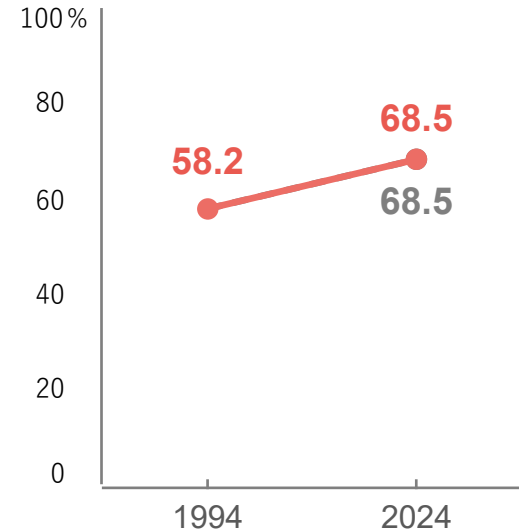
Do not refute opinions that are different from mine



Avoid being with someone I can't get along with



Shy about standing out



Nowadays, young and older people...

Want to avoid conflict and looking wrong



“Incorrect” Image of Youth

Characteristics wrongly attributed to young people

by prevailing narratives



Incorrect image of
youth #1

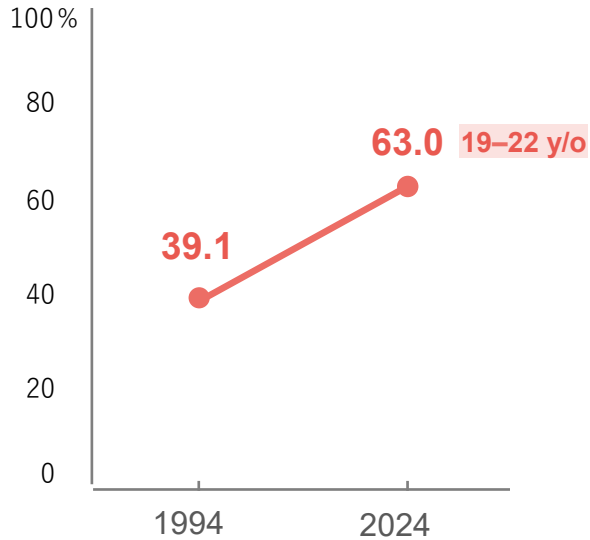


Young people today are venture-oriented?

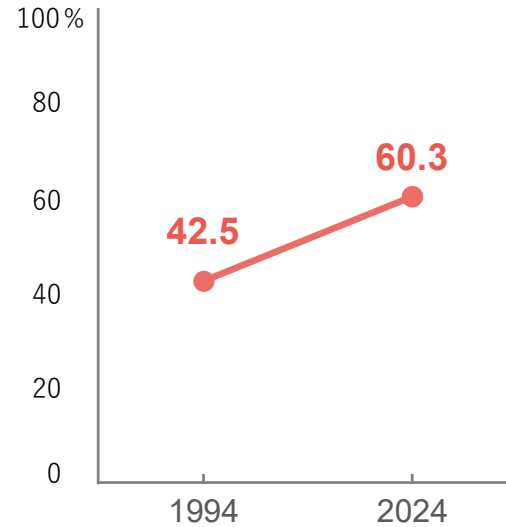
On the contrary, they are

Oriented toward big companies

Oriented more toward big companies than ventures



It's better to have higher academic credentials



Interest is rising in access to higher education and jobs in big companies.



Incorrect image of
youth #2

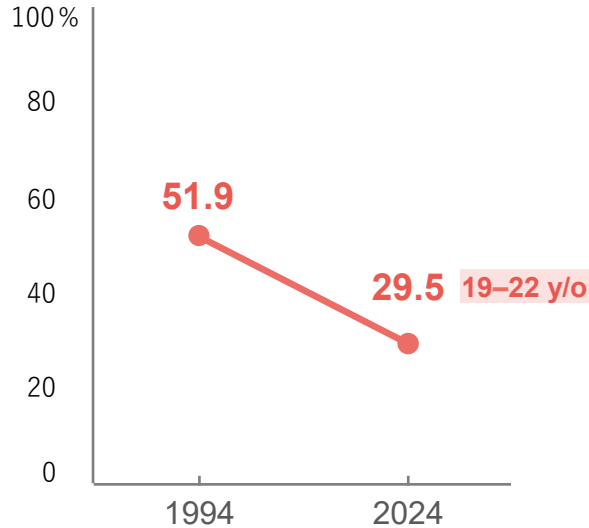


Young people today are social-minded?

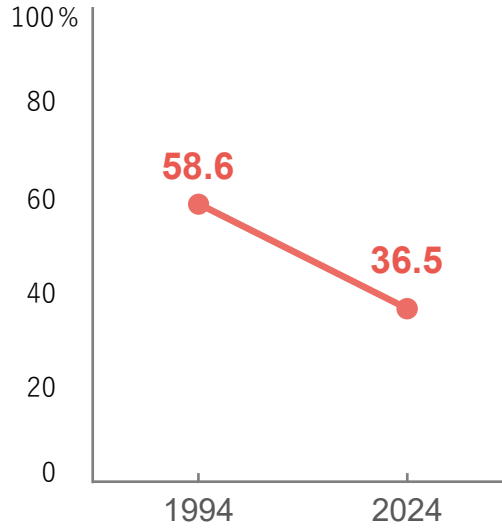
On the contrary, their

Social awareness has declined

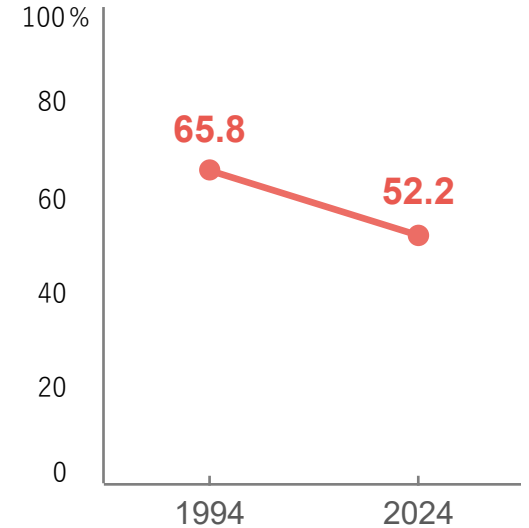
Buy environmentally-sound products even if they are more expensive



Willing to accept inconvenience to protect the global environment

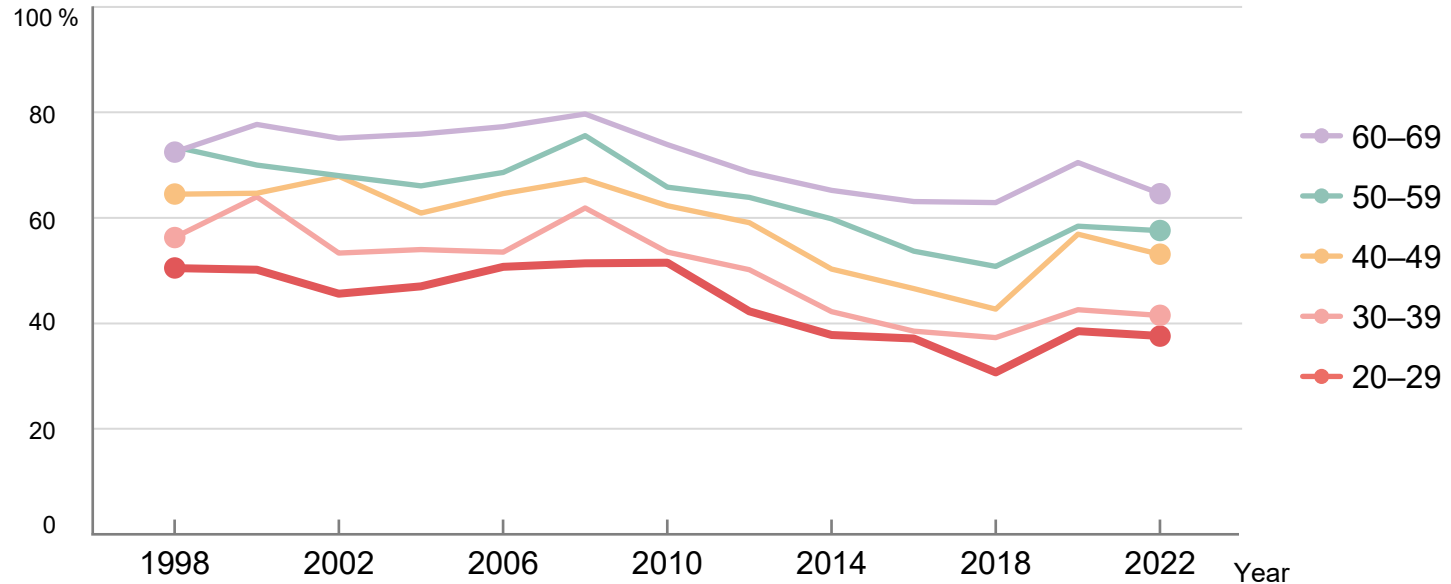


The Japanese should be more interested in national and social affairs



Fewer people are willing to accept higher costs and inconvenience

Thinking about protecting the global environment



Source: HILL, "Chronological Lifestyle Survey"

Fewer people are willing to accept higher costs and inconvenience

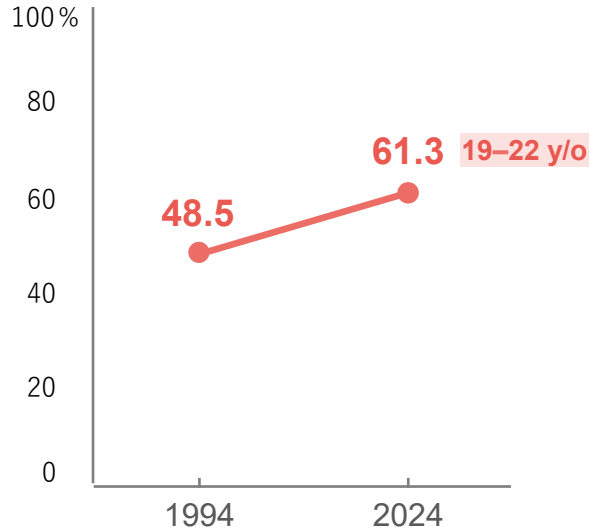
**Incorrect image of
youth #3**

**Young people today have a lower sense of
self-affirmation?**

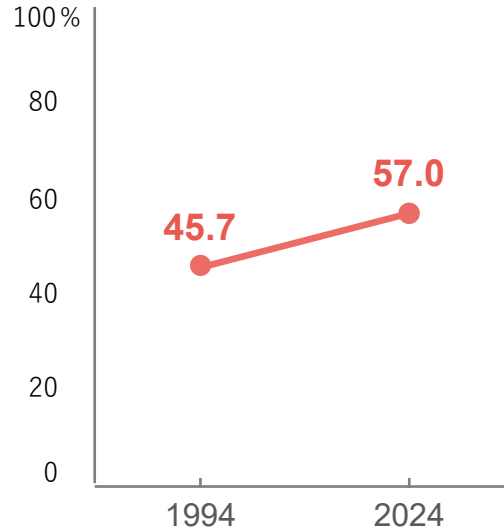
On the contrary, they now tend to

Accept themselves as they are

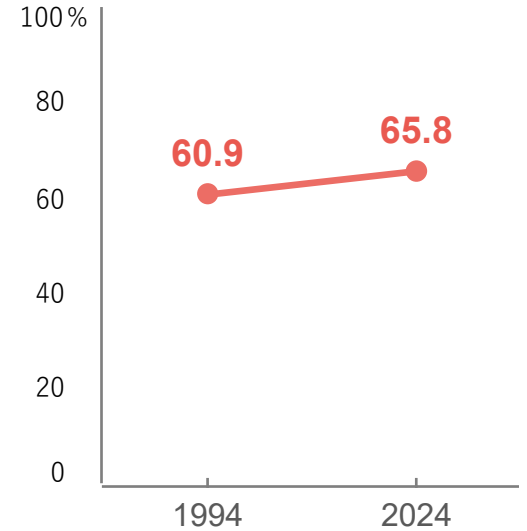
I know the limits of my abilities



What I am is what I am.
No need to communicate it



I like me as I am



Young people know their limits and accept themselves as they are



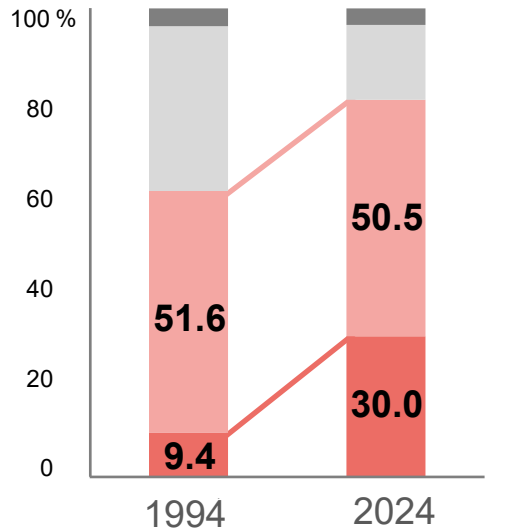
**Incorrect image of
youth #4**

**Young people today are suffering due to
stagnant economic growth?**

On the contrary, their

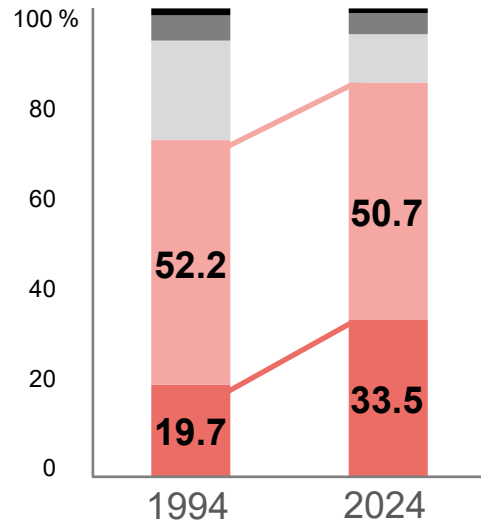
Perceived QoL has improved

Life satisfaction



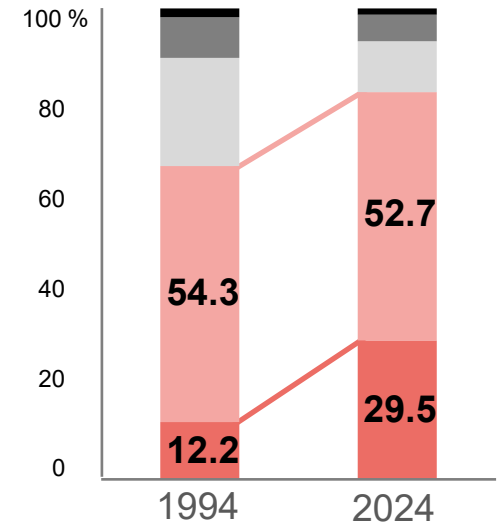
Very satisfied Rather satisfied Do not know
Rather dissatisfied Very dissatisfied

I feel happy



Very happy Rather happy Do not know
Rather unhappy Very unhappy

I feel joy in life



Very enjoyable Rather enjoyable Do not know
Rather unenjoyable Very unenjoyable

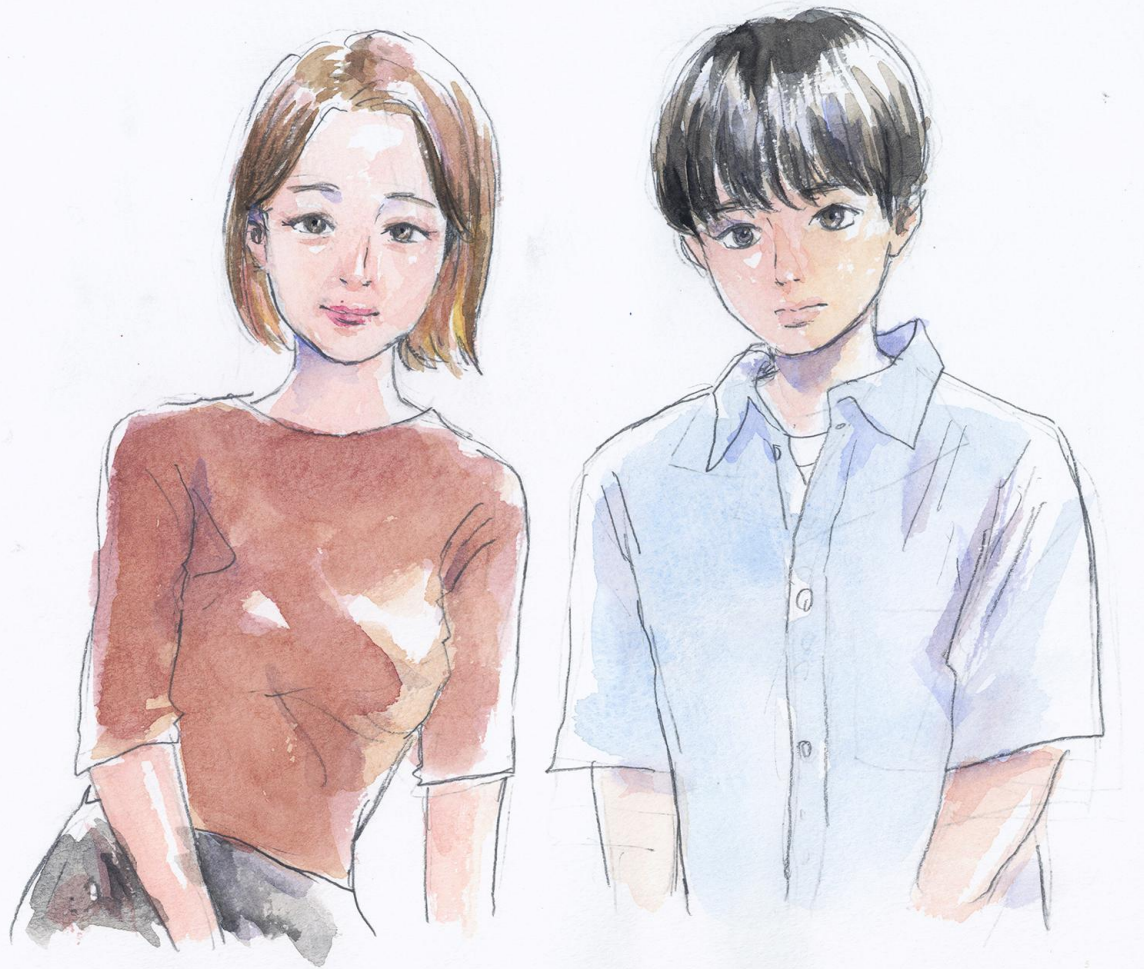
Young people feel a strong sense of satisfaction,
happiness and joy



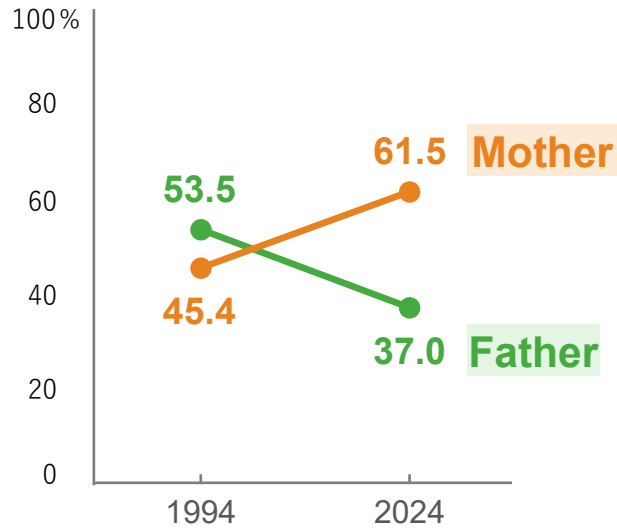
Part 2

Gen Z driven by mothers and same-gender peers

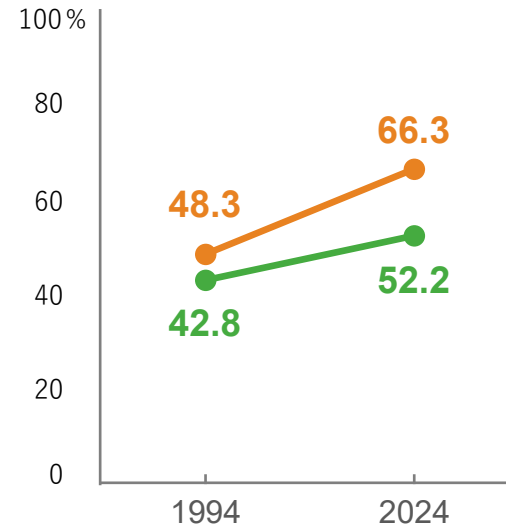
Gen Z and their mothers



Respected parent

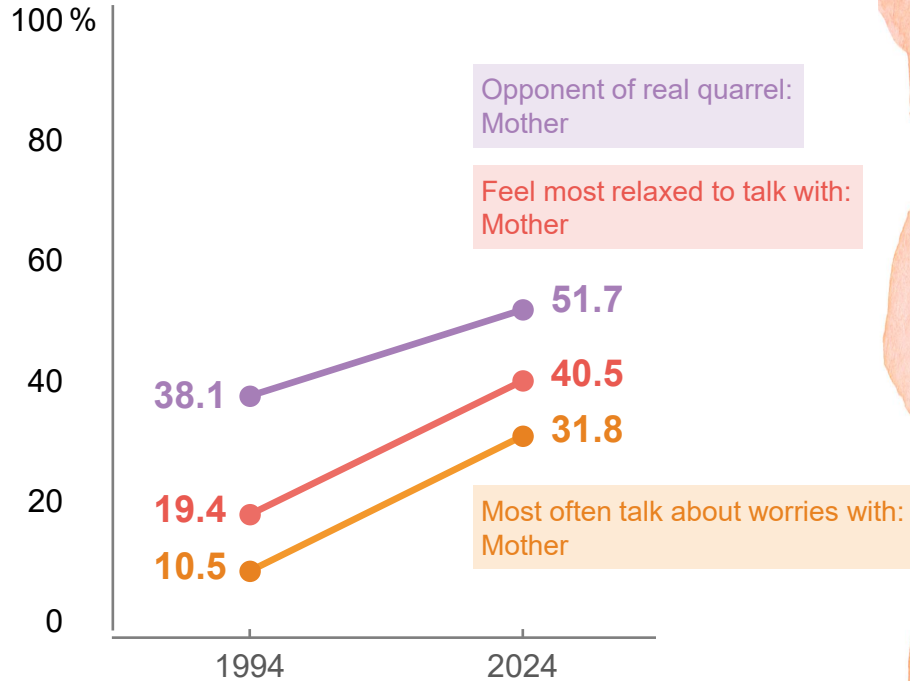


Follow the advice of



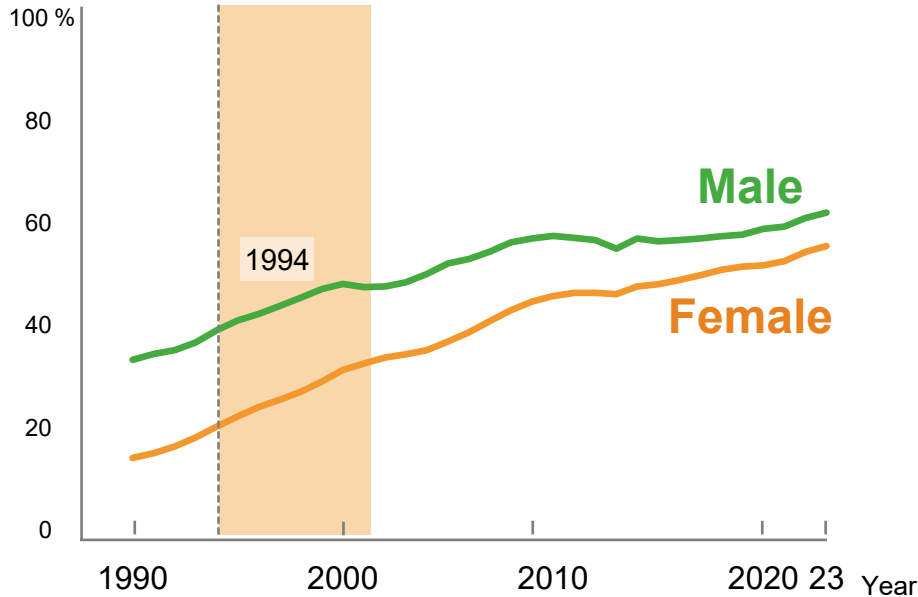
Both respect and trust go to the mother

Parent and friend for me



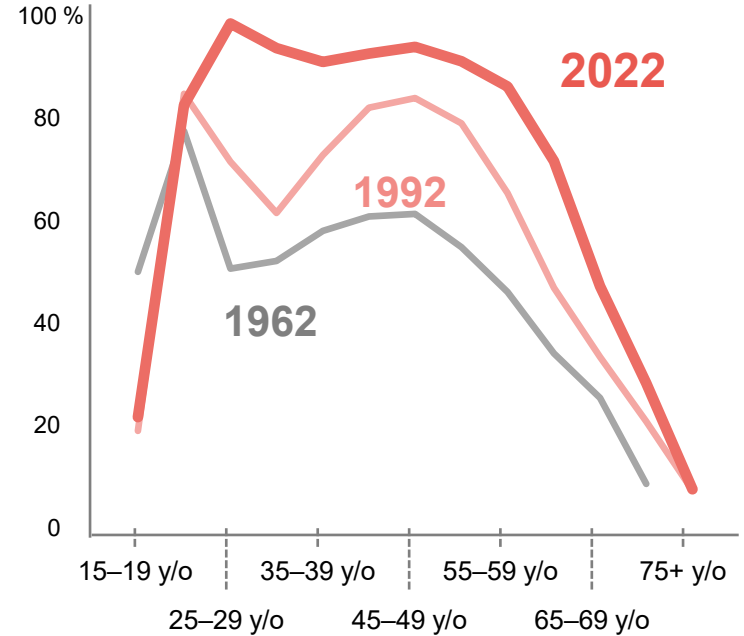
**Their mother is
someone to quarrel
with,
feel relaxed with, and
confide worries to**

College-going rate



Source: Ministry of Education, Culture, Sports, Science and Technology, "Schools Basic Survey"

Female employment rate



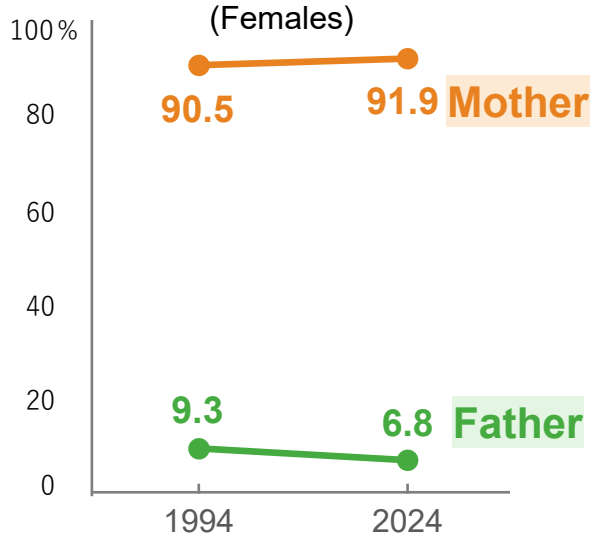
Compiled by HILL based on Statistics Bureau of Japan, "Employment Status Survey"

Mothers today have more experience of working and studying

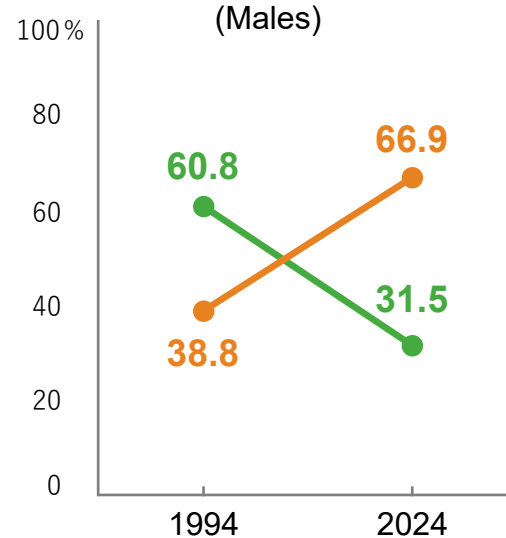
Parent-Child Relationship: 30 Years of Change (1)

**Moms are increasingly
“capable”**

Parent to go out with



Parent to go out with

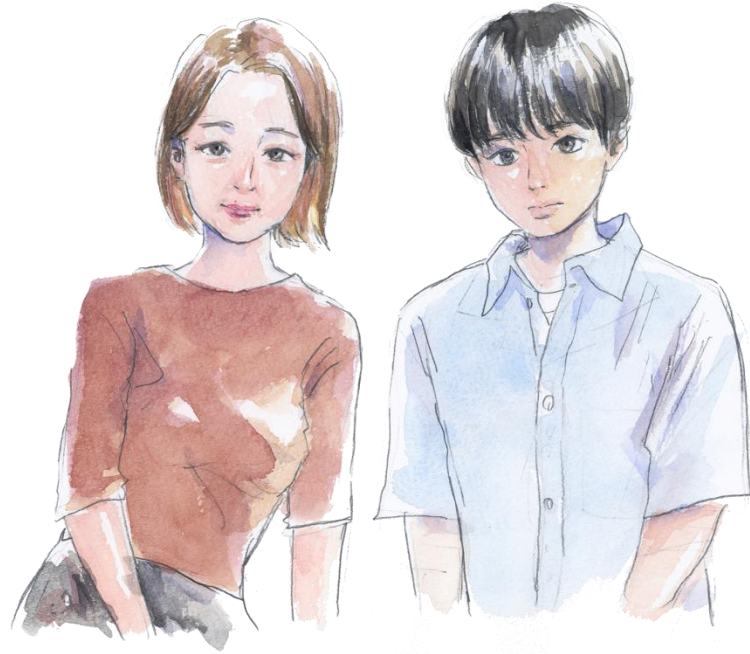


Both daughters and sons prefer to go out with their mother rather than their father

Parent-Child Relationship: 30 Years of Change (2)

**Doing more things together
with mom**

For Gen Z, their mother is a...



Mentor mom

who accompanies and leads them.

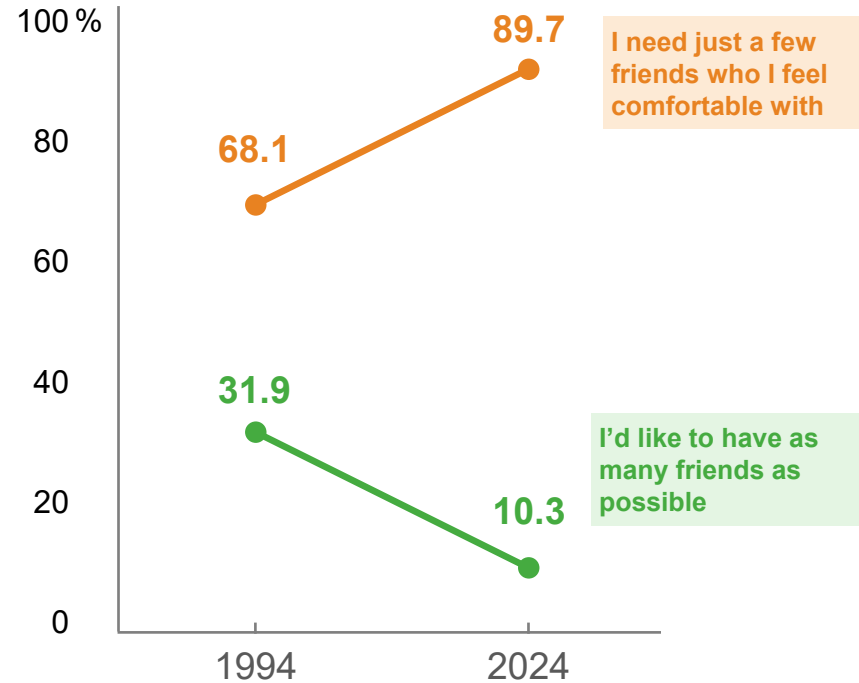


Gen Z and same-gender peers



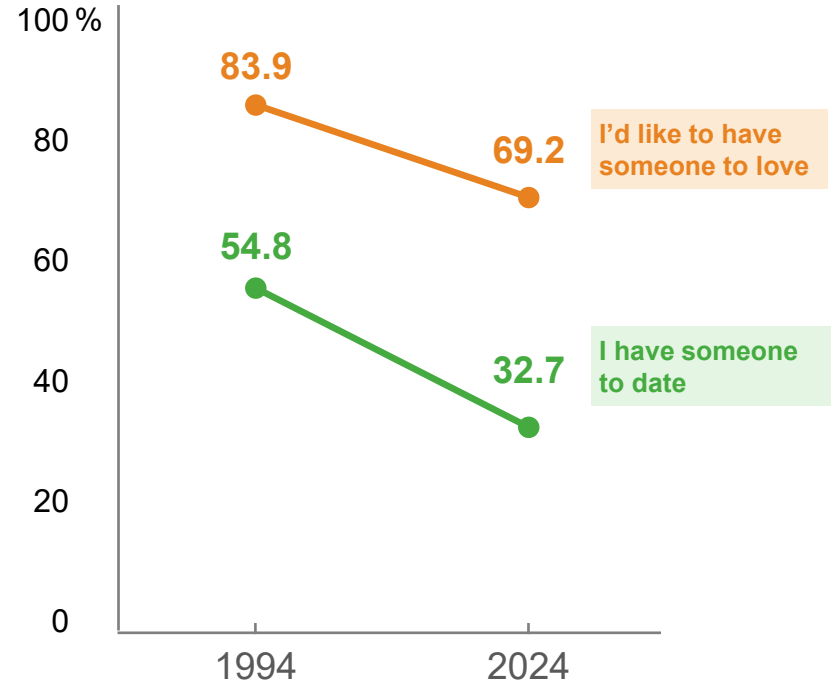
“I need just a few friends, not many, whom I feel comfortable with”

Thoughts about personal relationships

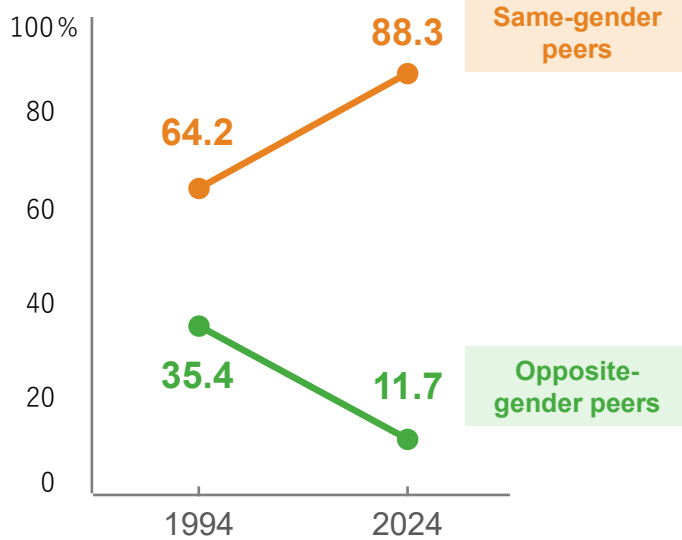


**Young people are
turning away from love
and dating**

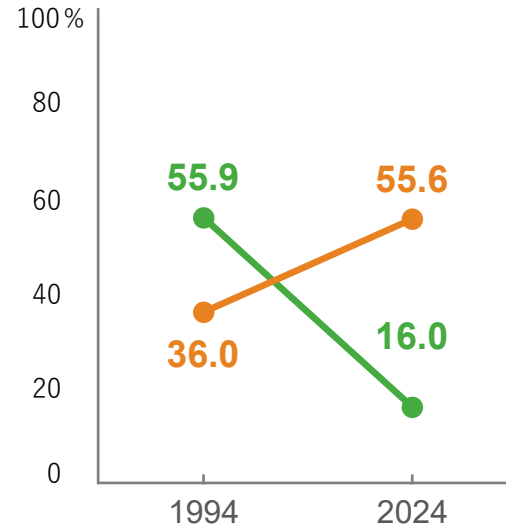
Thoughts about male-female
relationships



Someone to have fun with



Someone to be with when I'm down



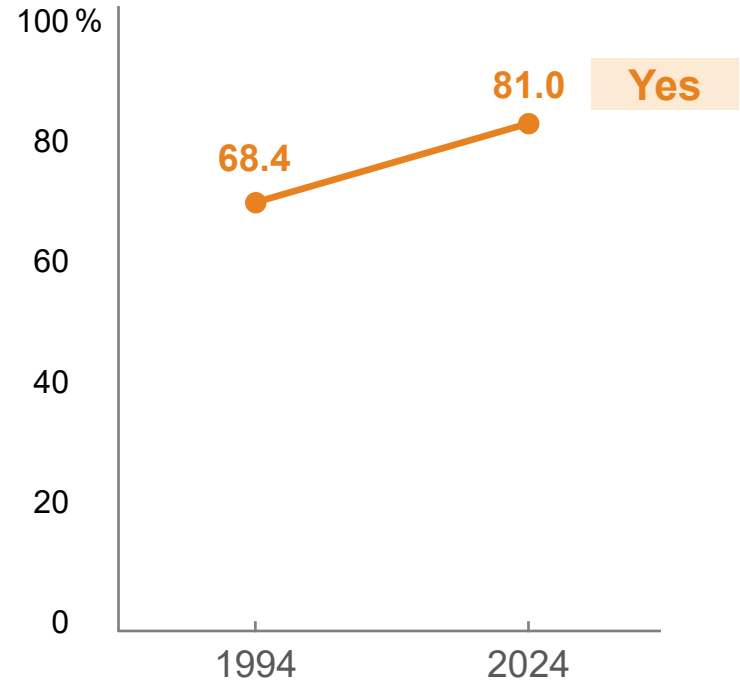
It's more fun to be with same-gender peers than opposite-gender peers

Friendship among Young People: 30 Years of Change (1)

**Same-gender peers are
“sustainable friends”**

Young people are choosing friends depending on the information they want

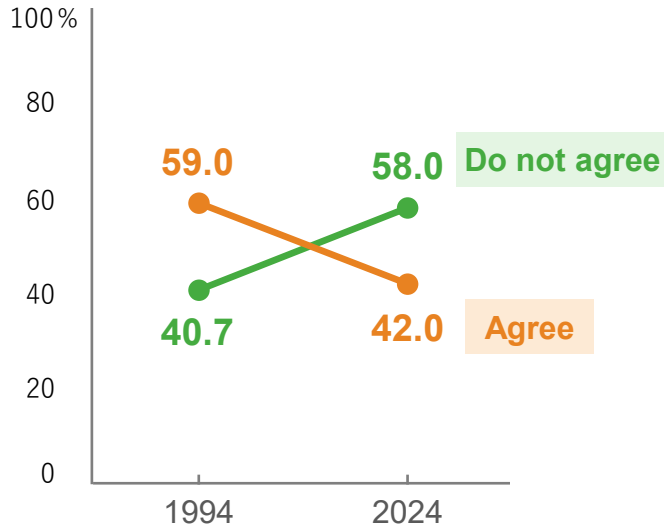
I often choose friends depending on the topic of conversation



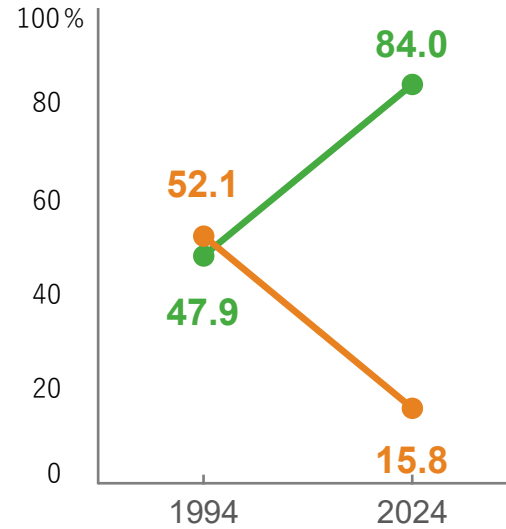
Friendship among Young People: 30 Years of Change (2)

**Same-gender peers are
“fellow soldiers in the
information war”**

Do not mind having indecent chats with opposite-gender peers



Want to date someone else even if I have a steady partner



Compliance awareness related to sex has been rising

Friendship among Young People: 30 Years of Change (3)

**Same-gender peers are an
“area free from compliance”**

For Gen Z, same-gender peers are...



Low-risk friends

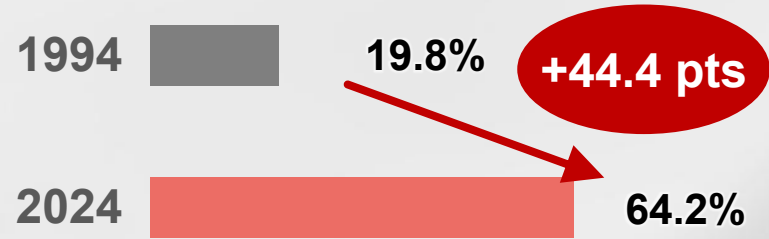
who are easy to be with.



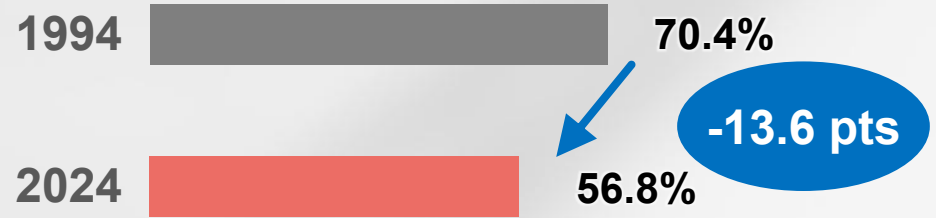
Part 3

**How companies might develop relationships
with Gen Z**

Often buy goods from catalog companies (including online)



Often go to shops with wider range of products



The shift from brick and mortar to e-commerce is progressing, but...

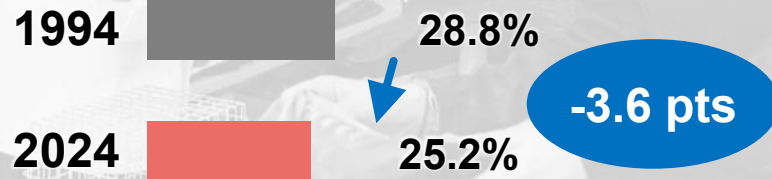
Want better things even if they cost more



Buy what I like even if it's more expensive



Try new products as soon as possible

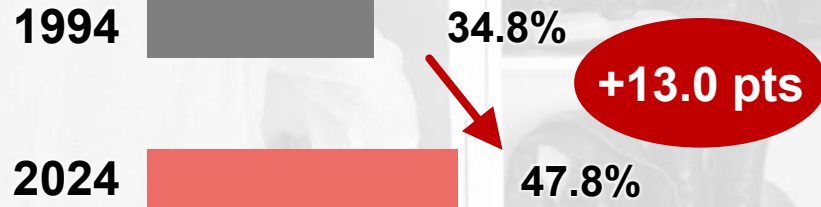


The values and desires behind purchasing behavior have not changed much

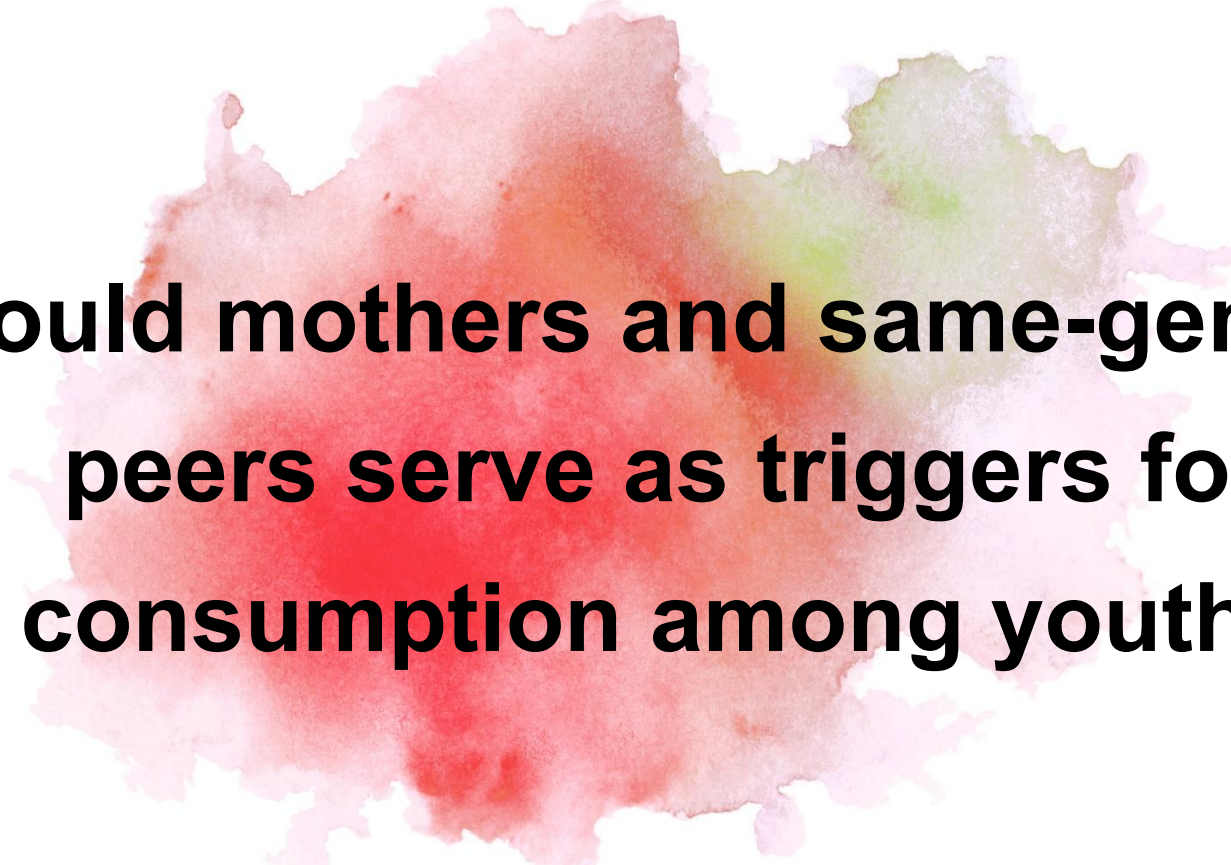
There are too many things at home



Cannot think of what I really want



Young people are already surrounded by things, making it hard for new desires to emerge



**Could mothers and same-gender
peers serve as triggers for
consumption among youth?**

Have a common hobby with mom



Their mother is also a partner in hobbies

Mothers and children are sharing goods and services

Mom often wears my clothes and I often wear hers. (20-year-old male)

Mom and I go to year-end live concerts of her favorite male idol. (22-year-old male)

I share an IPL hair removal device with mom. (19-year-old male)

I help mom make progress in her game. (21-year-old female)

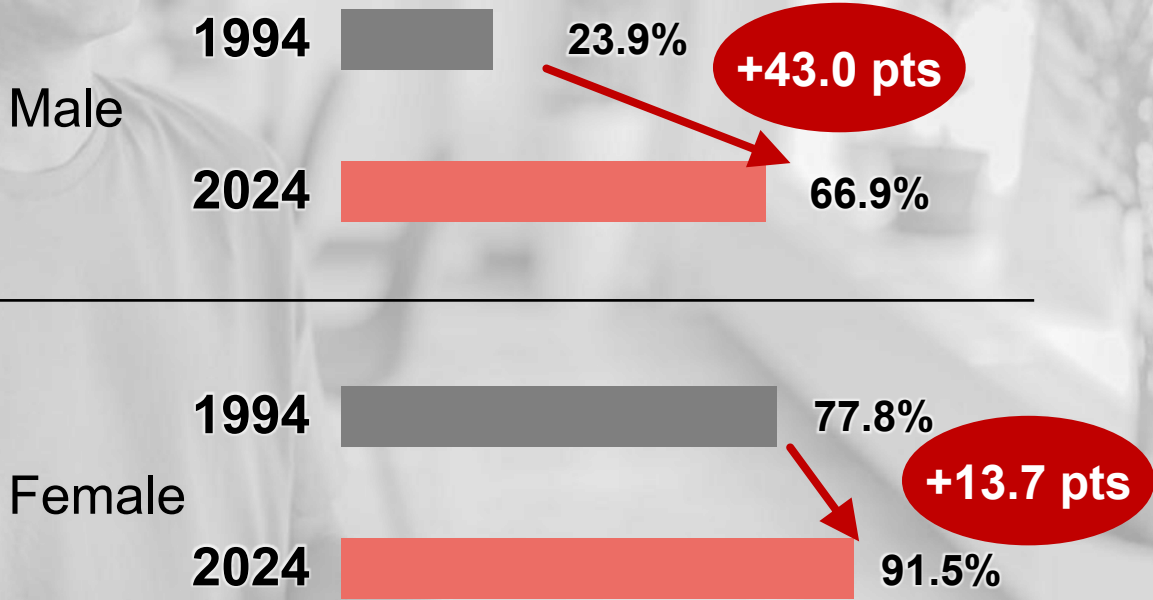
Children “inherit” the lifestyle of their mother

Categories in which the choice of friends and peers has influence

	Change over 30 years
Average of all categories	+7.4 (pts)
● Smart/portable phones ((portable) phones in the 1994 survey)	+36.4
● Video content (video software/discs in the 1994 survey)	+26.3
● Gaming software	+21.5
● Cosmetics	+20.0
● Alcoholic beverages	+19.2
● Restaurants	+14.2

Categories where friends' choices have influence
have increased

Have received a birthday gift from a friend of the same gender



Young people receive gifts from same-gender **friends**, and not from steady boy/girlfriends

Various gift-giving within the same gender

I gave beauty essence and a curling iron
(¥20,000 in total).
(22-year-old female)

I gave my best friend a matching set with
a top and bottom.
(20-year-old female)

I gave him clothes and accessories and
he gave me a pair of high-end sneakers.
(21-year-old male)

He gave me a brand-name pouch, and I
bought the backpack and the rest of the
set.
(22-year-old male)

**The choice of same-gender peers
leads to “discoveries”**

How can a company be a mentor or low-risk friend to young people?

“I can be honest with you.”

“You can see through me.”

It's about securing psychological safety.



Wrap-up

Youth of the “risk aversion generation”

- ✓ Risk aversion-oriented
- ✓ Belief in academic credentials and big companies
- ✓ Parent-child relationship that is too close
- ✓ Business-like friendships...



Beyond understanding
Feel empty
faint-hearted
Future's not bright...

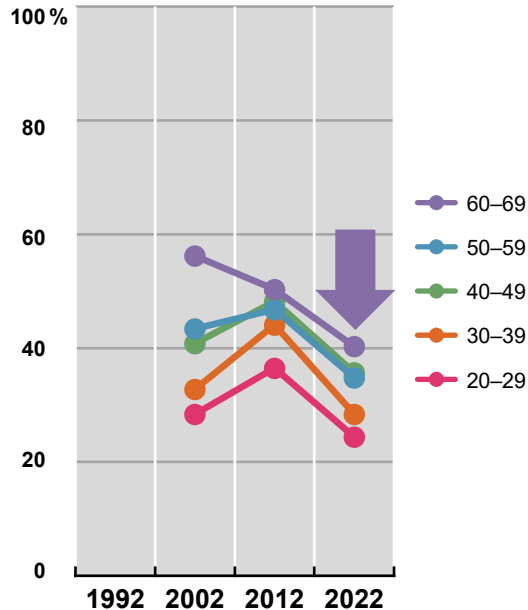
That's the way to adapt to a "VUCA society"

- ✓ Risk aversion-oriented
- ✓ Belief in academic credentials and big companies
- ✓ Parent-child relationship that is too close
- ✓ Business-like friendships...

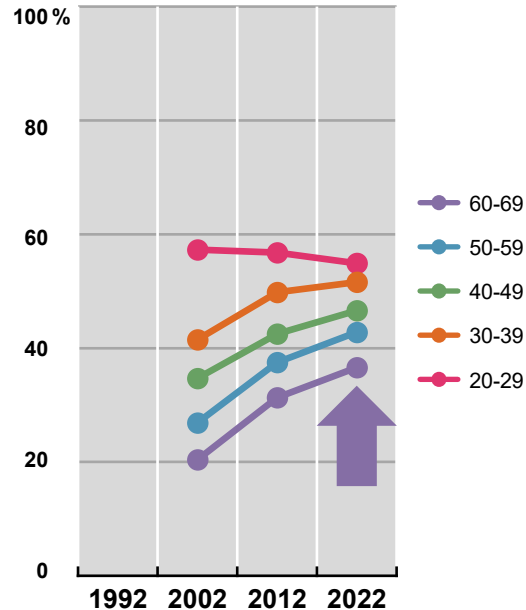


Volatility
Uncertainty
Complexity
Ambiguity

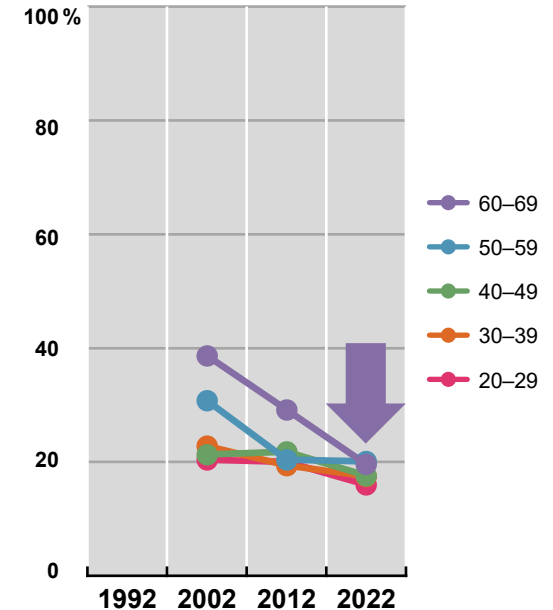
It's only natural to follow traditions and customs



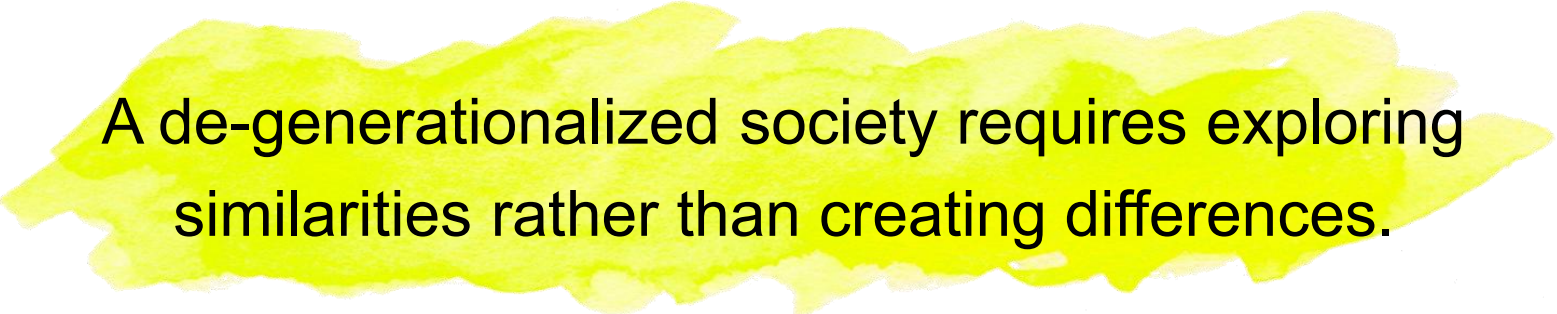
Buy gifts for myself



Prioritize work over family life



Older people are converging with youth in their values...

A horizontal brushstroke of yellow paint with irregular, feathered edges, serving as a background for the text.

A de-generationalized society requires exploring similarities rather than creating differences.

In other words, it is easy for people to find similarities with their mother and same-gender peers.

The background of the slide is a vibrant yellow watercolor wash with irregular, organic edges, creating a textured and artistic feel. The text is centered horizontally and vertically within the white space of the slide.

Young people who will lead Japan in 10 years are
also the leaders of a VUCA society.