

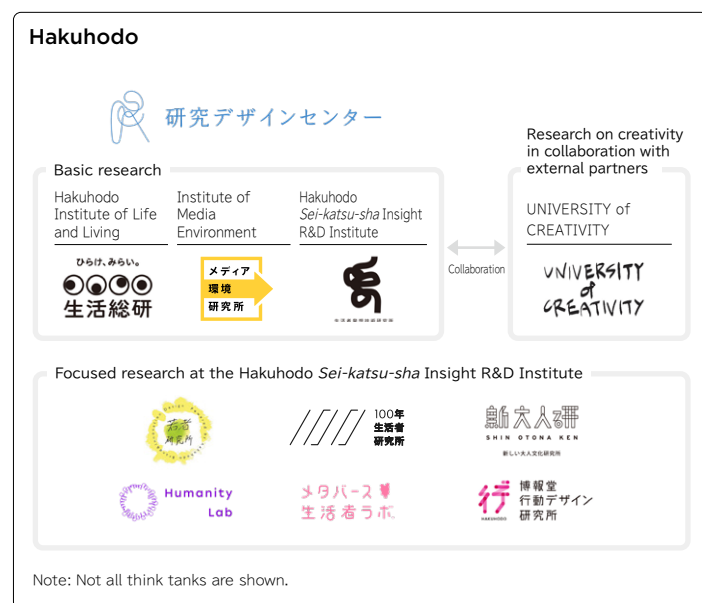
Sei-katsu-sha Insight as a Source of Value Creation

Advancing and Deepening Sei-katsu-sha Insight

The foundation of the Hakuholdo DY Group's thinking lies in *sei-katsu-sha* insight. Our research institutes and think tanks not only explore and make proposals in fields related to *sei-katsu-sha*, marketing, and creativity. They also disseminate the findings of their research and experiments to the public. Additionally, we conduct training programs for employees that revisit *sei-katsu-sha* thinking from multiple perspectives to inspire awareness and new ideas. Through these initiatives, we aspire to provide *sei-katsu-sha* with a spark of creativity that can shape the future and lead to the exploration of new markets and the further development of society.

Hakuholdo DY Group Institutes and Think Tanks

We conduct research, development, communication, and education centered on *sei-katsu-sha* insight.



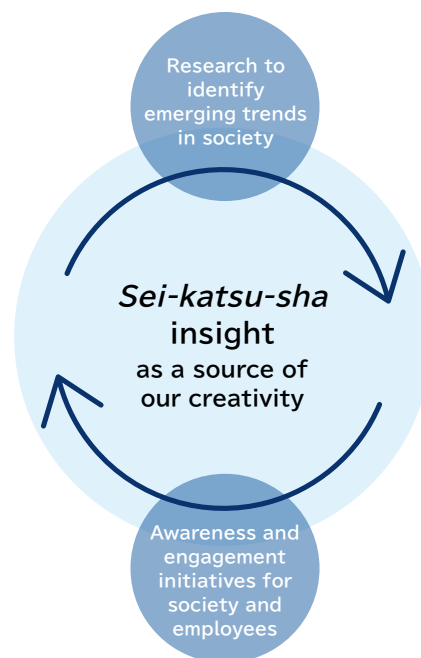
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About Sei-katsu-sha Insight

Sei-katsu-sha insight is the foundation of our thinking and planning. It reminds us that consumers have heartbeats and are more than just shoppers performing an economic function. These unique, autonomous individuals that we refer to as *sei-katsu-sha* live in an increasingly diverse society. We believe that deeper insight into their lives is the source from which new value springs. That is why we make it our business to know *sei-katsu-sha* better than anyone else and to use that knowledge to make media a stronger bridge between advertisers and customers.

Hakuholdo DY Group Employee Training on Sei-katsu-sha Insight

We conduct *sei-katsu-sha* insight training programs from multiple perspectives to encourage employees to recognize and put its principles into practice.

The Culture Cultivation Community

This community-based training program, launched in 2022, brings together participants from Group companies to engage with *sei-katsu-sha* insight, take part in dialogue and exchange, and cultivate a corporate culture that generates new value. In its third year, the program has expanded to include more participating organizations and provides hands-on training in problem creation and problem solving. It aims to develop and connect individuals who transcend organizational boundaries to co-create and become a source of a Group's competitiveness.



The Culture Cultivation Lab with Kyoto University

This selective training program offers chosen employees the opportunity to deepen their understanding of *sei-katsu-sha* insight from a philosophical perspective under the guidance of Professor Yasuo Deguchi of Kyoto University. Participants travel to Kyoto every month for in-depth discussions, with the goal of developing culture-driven leaders who will proactively lead the formation of the organization's culture.



Sei-katsu-sha Insight as a Source of Value Creation

Research Institutes and Think Tanks (Hakuhodo)

In April 2024, Hakuhodo established the Research Design Headquarters to strengthen research and development functions of *sei-katsu-sha* insight, which serves as a source of the Hakuhodo DY Group's competitive edge. The Headquarters collects cutting-edge information and knowledge on *sei-katsu-sha* through proprietary studies and other means. Leveraging collaborations and research networks with universities, other companies, and research institutions, it also conducts basic and applied research on *sei-katsu-sha* insight, including solution development. In addition to sharing knowledge within the Group and providing value to clients, it actively promotes broader awareness of *sei-katsu-sha* insight through continuous public communication.



Goro Hokari
Institute Head
Hakuhodo Institute
of Life and Living

Hakuhodo Institute of Life and Living
A Think Tank Researching Sei-katsu-sha for Over 40 Years

Since its founding in 1981 to embody *sei-katsu-sha* insight, the Hakuhodo Institute of Life and Living (HILL) has studied shifts in human values by viewing people not simply as consumers but as individuals who act with autonomy. Its wide-ranging research includes the Chronological Lifestyle Survey, which has tracked changes in *sei-katsu-sha* values since 1992; proprietary studies using big data and chat logs to identify early signs of behavioral change; and ethnographic research involving in-home fieldwork to uncover unspoken feelings and subtle social dynamics that cannot be fully understood through language alone. These multifaceted and distinctive approaches contribute to the Group's unique value creation.

In 2023, using long-term data from the Chronological Lifestyle Survey, HILL demonstrated that differences in attitudes, preferences, and values among generations are shrinking—a phenomenon it described as the emergence of a “de-generationalized society.” This concept highlights how age alone can no longer define people's values or needs. By questioning conventional wisdom and believing in *sei-katsu-sha*, HILL takes a fresh, open-minded approach that prioritizes *sei-katsu-sha*'s values. The early insights it gains into social change are applied by the Group in its proposals to clients.

Overview of the Hakuhodo Institute of Life and Living

Established	1981
Global offices	Hakuhodo Institute of Life and Living Shanghai (China, established 2012) Hakuhodo Institute of Life and Living ASEAN (Bangkok, Thailand, established 2014)
Research focus	Independent research and dissemination of information on new <i>sei-katsu-sha</i> values and social change <ul style="list-style-type: none">Example of long-term tracking studies Chronological Lifestyle Survey: biennial survey tracking 1,400 <i>sei-katsu-sha</i> attitudinal indicators since 1992Examples of thematic research De-Generationalizing Society (2023) Japanese Youth: 30 Years of Change (2024) Working Anew (2025)



Kei Takeuchi
Institute Head
Hakuhodo
Sei-katsu-sha Insight
R&D Institute

Hakuhodo Sei-katsu-sha Insight R&D Institute
A New Organization Established to Make Sei-katsu-sha Insight Accessible as Practical Technology

Hakuhodo *Sei-katsu-sha* Insight R&D Institute was established in 2024 as a specialized organization dedicated to research and development that advances clients' use of *sei-katsu-sha* insight. The mission of the Institute is to make *sei-katsu-sha* insight more accessible by transforming it into practical technology—knowledge, solutions, tools, and programs that can be applied widely.

In an era defined by volatility, uncertainty, complexity, and ambiguity, companies are required to respond more creatively, unfettered by precedent or conventional thinking. This requires each member of an organization to act not only as an employee bound by convention but as an individual *sei-katsu-sha* with personal will and perspective. Moreover, companies are increasingly expected to realize not only economic value but also social and *sei-katsu-sha* value, as expressed through their purpose. In this context, *sei-katsu-sha* insight is expected to become even more essential across all areas of business.

In a world of rising uncertainty and the breathtaking speed of technological evolution, such as AI, while the importance of people is simultaneously being rediscovered, we are confident that our *Sei-katsu-sha* Insight philosophy is a valuable asset to share with companies and organizations across various sectors.

Overview of the Hakuhodo Sei-katsu-sha Insight R&D Institute

Established	2024
Research focus	Based on the deepening and evolution of insights into <i>sei-katsu-sha</i> and society, the Institute develops and implements <i>sei-katsu-sha</i> insight as practical knowledge, solutions, tools, and programs available for internal and external use. Main research projects <ul style="list-style-type: none">Focused <i>sei-katsu-sha</i> research and development: Hakuhodo Youth Life Lab, Institute of New Adult Living, Institute of 100-Year <i>Sei-katsu-sha</i> Life, Institute of Activation Design, and othersNew frontiers in <i>sei-katsu-sha</i> research: Metaverse <i>Sei-katsu-sha</i> Lab, Humanity Lab, and othersFuture <i>sei-katsu-sha</i> insight: Future Foresight Project, Art Thinking Program, and othersResearch and development on new marketing trends: community marketing research, advanced <i>sei-katsu-sha</i> tribe research, and others