

Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN 2023

results announced

Our first ever survey covering eight countries

Responses where each country ranked first:









- Japan: I don't often take specific actions to protect the global environment
- China: Work comes first
- Thailand: My spouse and I equally divide responsibilities

Hakuhodo Institute of Life and Living (HILL), in partnership with Hakuhodo Institute of Life and Living Shanghai (HILL Shanghai) and Hakuhodo Institute of Life and Living ASEAN (HILL ASEAN), has recently completed its first eight-country survey, the Chronological Lifestyle Survey on *Sei-katsu-sha** in Japan, China and ASEAN. This survey was designed to identify lifestyles and behaviors of *sei-katsu-sha*—Hakuhodo’s term for the holistic person—in Japan, China, and six ASEAN countries. It took the form of an online survey of 11,000 males and females aged 15–59. (See p. 10 for an overview.)

Where did each of the eight countries rank highest or lowest? This news release presents the most revealing data as selected by researchers in each country, along with their comments. We hope it enables understanding of how *sei-katsu-sha* differ from country to country.

* “*Sei-katsu-sha*” is a term we use to describe people not simply as consumers, but as fully rounded individuals with their own lifestyles, aspirations and dreams.

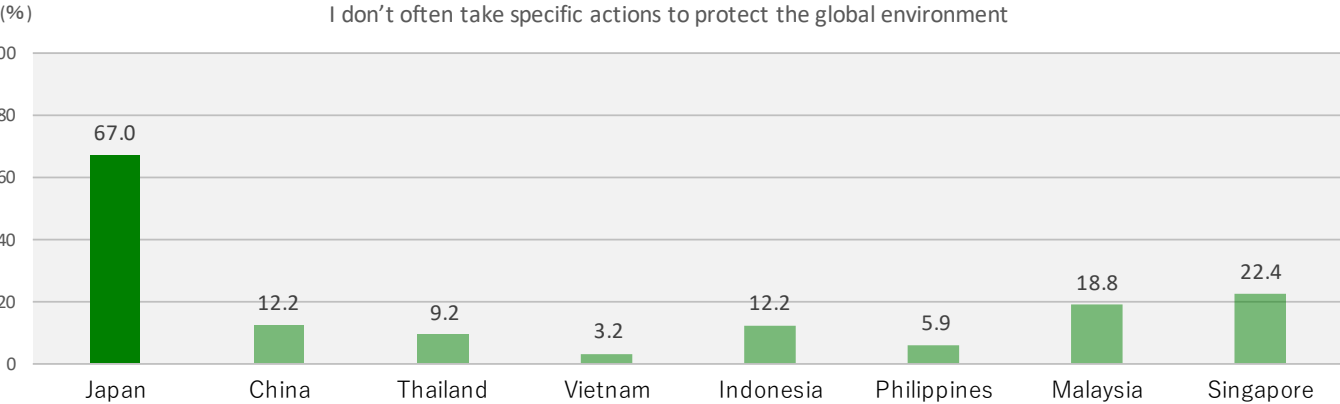
Responses where each country ranked first

	<div>Japan</div> <div>I don't often take specific actions to protect the global environment</div> <div>A surprising result. Maybe the Japanese are more stringent about what it means to protect the global environment.</div>	<div>% so responding</div> <div>67.0%</div>	<div>Difference with lowest (8th) ranking country</div> <div>(+63.8 pts)</div>
	<div>China</div> <div>Work comes first</div> <div>More people in China than elsewhere prioritize work over family life because they're eager to raise their standard of living by working hard.</div>	<div>31.6%</div>	<div>(+19.4 pts)</div>
	<div>Thailand</div> <div>My spouse and I equally divide responsibilities (married respondents only)</div> <div>Hired help, nannies (professional childcare assistants), and living with parents all contribute to gender equality.</div>	<div>67.6%</div>	<div>(+45.7 pts)</div>
	<div>Vietnam</div> <div>I believe in academic background</div> <div>In Vietnamese society, the harder you study, the more you get ahead or are rewarded. This fixation on academic qualifications is likely to endure.</div>	<div>53.1%</div>	<div>(+43.8 pts)</div>
	<div>Indonesia</div> <div>I believe in the afterlife</div> <div>Because of their faith, many Indonesian <i>sei-katsu-sha</i> believe in the afterlife and aspire to do good deeds.</div>	<div>64.6%</div>	<div>(+58.8 pts)</div>
	<div>Philippines</div> <div>I believe in love</div> <div>Filipino <i>sei-katsu-sha</i> treasure their bonds with others, be it romantic love or love of family.</div>	<div>78.4%</div>	<div>(+61.1 pts)</div>
	<div>Malaysia</div> <div>I believe in money</div> <div>Malaysia is not an outlier in this regard. <i>Sei-katsu-sha</i> in all eight countries appear to share a belief in the importance of money.</div>	<div>53.2%</div>	<div>(+10.5 pts)</div>
	<div>Singapore</div> <div>I don't mind travelling abroad alone</div> <div>Travelling abroad is a favorite pastime among Singaporeans. Many of them are well-off and self-reliant.</div>	<div>31.9%</div>	<div>(+22.2 pts)</div>

I don't often take specific actions to protect the global environment



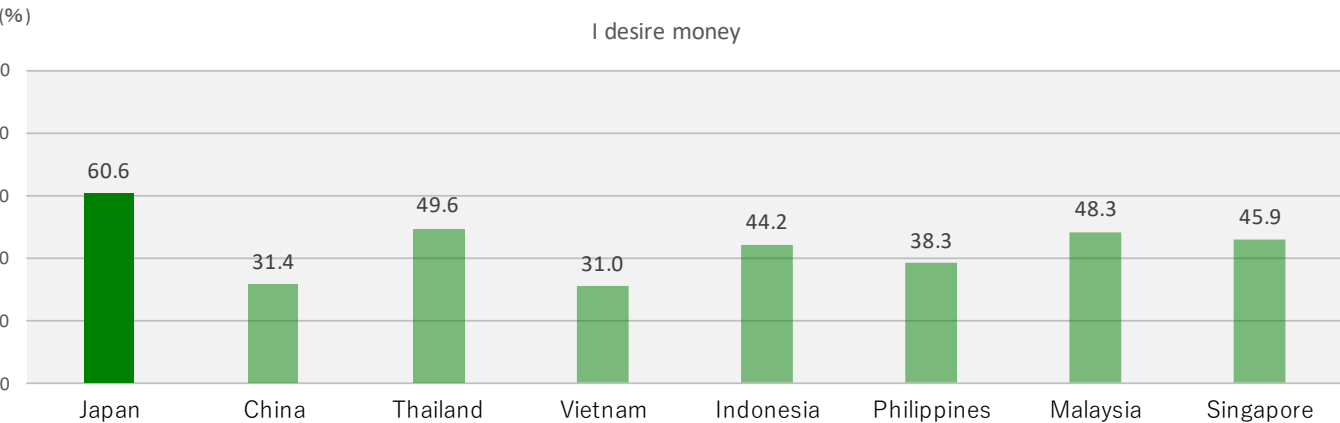
Japan ranked first at 67.0%. In fact, its score was so high that none of the other countries even came close. That's surprising given how punctilious the Japanese are. They carefully separate waste as a matter of course, for example. And you often see them going around with their own tote bag so they don't need to use the plastic kind. So why this result on the survey? Maybe it's because the Japanese are more stringent about what it means to protect the global environment.



I desire money



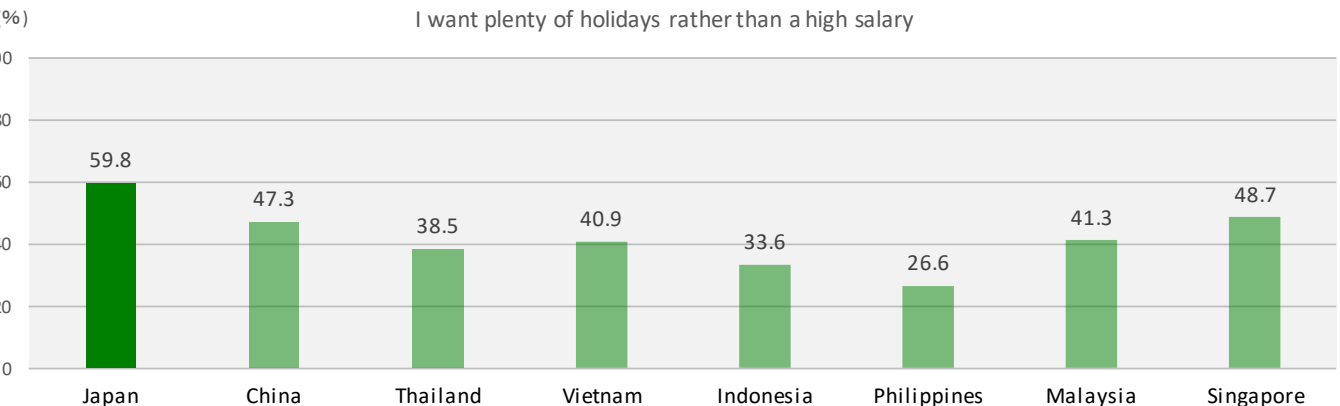
Japan ranked first at 60.6%. Japan is one of the world's most rapidly aging societies, so perhaps it only makes sense that people want plenty of money to support themselves in case they live to 100. There must also be another factor behind this desire for money. A recent series of wide-ranging price hikes, including higher food prices and utility bills, is squeezing household finances.



I want plenty of holidays rather than a high salary



Japan ranked first at 59.8%. It may at first seem like a contradiction to desire money yet want plenty of holidays rather than a high salary. But come to think of it, *sei-katsu-sha* have other things to do besides work at their jobs. Like bringing up the kids, for instance. With dads now expected to participate in parenting, more and more men are taking parental leave. Or looking after aging relatives. Given Japan's rapidly graying population, many workers would doubtless welcome time off to care for ailing family members. These circumstances unique to Japan are presumably what led to such a result.



Work comes first

Local researcher's comment:



China ranked first at 31.6%. It also ranked first in placing importance on a materially-rich lifestyle (see the chart below). This focus on raising their standard of living by working hard explains why more people in China than elsewhere prioritize work over family life.

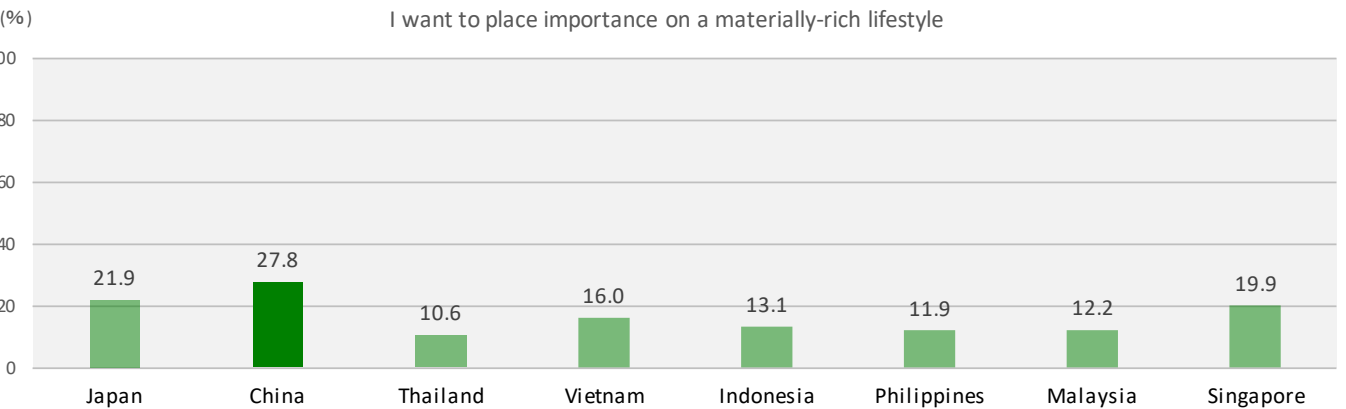


I want to place importance on a materially-rich lifestyle

Local researcher's comment:



China ranked first at 27.8%. China has witnessed dramatic growth over recent years. I had therefore assumed that the material desires of Chinese *sei-katsu-sha* (especially those in Tier 1 cities) had already largely been fulfilled, and they were starting to seek spiritual fulfillment instead. But the survey findings reveal that they remain more concerned with material affluence than their counterparts elsewhere.

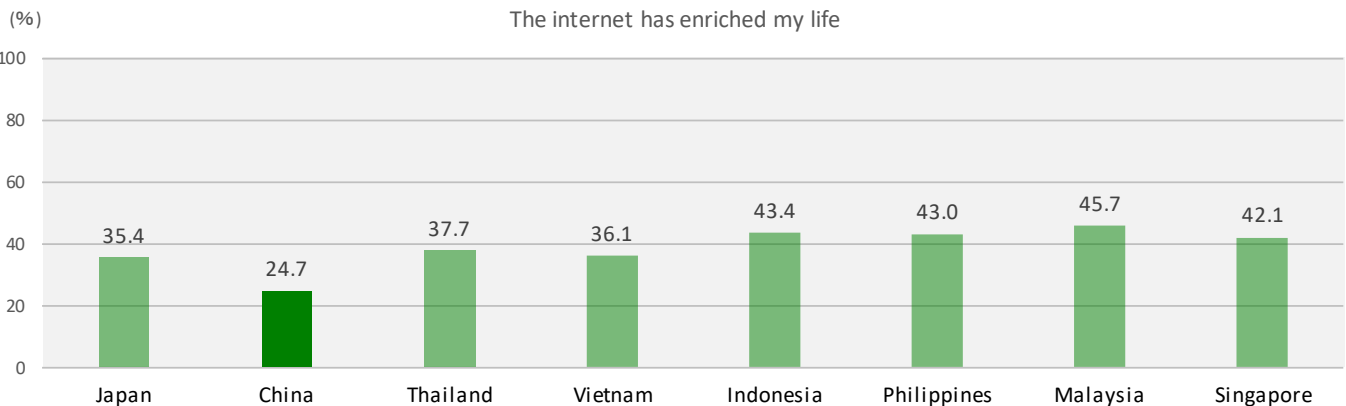


The internet has enriched my life

Local researcher's comment:



China ranked last at 24.7%. China has an extremely high level of internet penetration, especially mobile internet penetration, and the internet has made life much more convenient in many ways. The low percentage of Chinese who thought the internet had enriched their lives therefore came as a surprise. Since the internet has already penetrated every aspect of their lives, perhaps it does not feel like something that particularly enriches them.





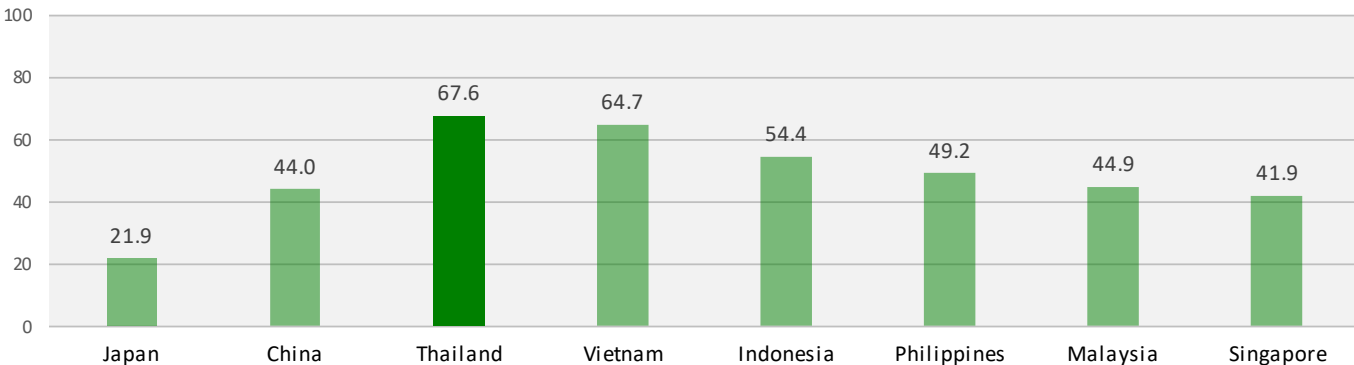
My spouse and I equally divide responsibilities (married respondents only)

Local researcher's comment:



Thailand ranked first at 67.6%. Indeed, many Thai women work on the front lines of business as CEOs, executives, and proprietors. Men and women differ little in their attitudes to work. Plus cheap hired help and nannies (professional childcare assistants) are widely available, and many live with their parents who do the housework and look after the kids. Together, these factors contribute greatly to creating a gender-neutral environment where women can pursue fulltime careers outside the home. In Thailand, by the way, it's the norm for mothers to return to work three months after having a baby.

(%) My spouse and I equally divide responsibilities (married respondents only)



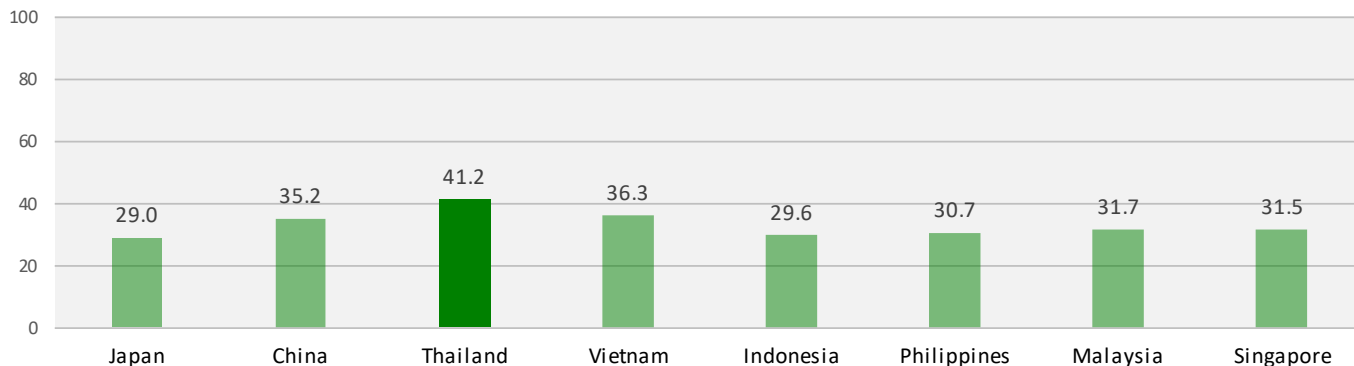
I desire freedom

Local researcher's comment:



Thailand ranked first at 41.2%. That's a surprising result, since Thais also seem to think that Thailand is a free place. Thai *sei-katsu-sha* put family first. Bonds among family members are strong, and so are their expectations. So maybe Thais have a stronger desire for freedom because of the various constraints they face in the form of family pressure and being told what to do.

(%) I desire freedom



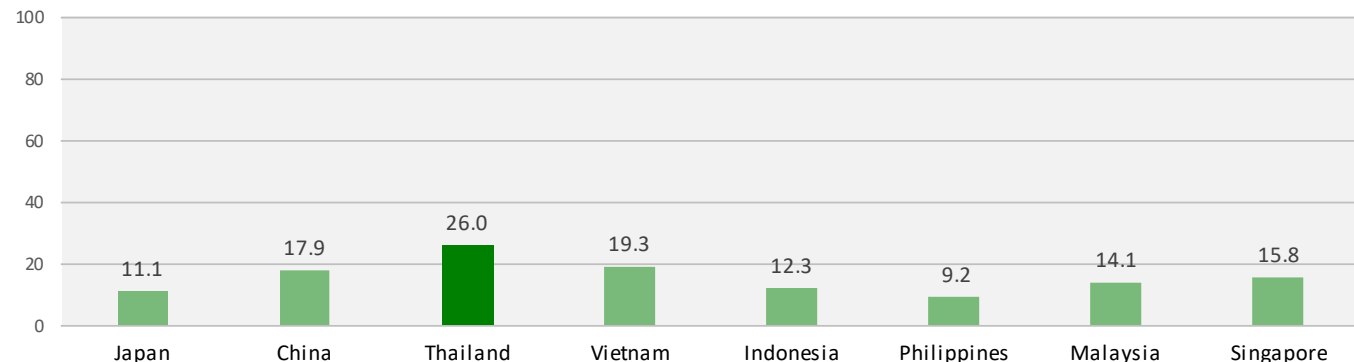
Love and marriage are not very important to my life

Local researcher's comment:



Thailand ranked first at 26.0%. That's a surprising piece of data, because romance is a favorite topic of conversation among Thais, and a remarkable number of Thai hit songs are about unrequited love. On the other hand, single-person households are becoming more common in Thailand, and Thai society is tolerant of singles. Moreover, in Thailand, as in other ASEAN countries, the extended family reigns supreme. Many people live with someone even if they're not married, so it may be that they seldom suffer from loneliness or feel the need to get married.

(%) Love and marriage are not very important to my life

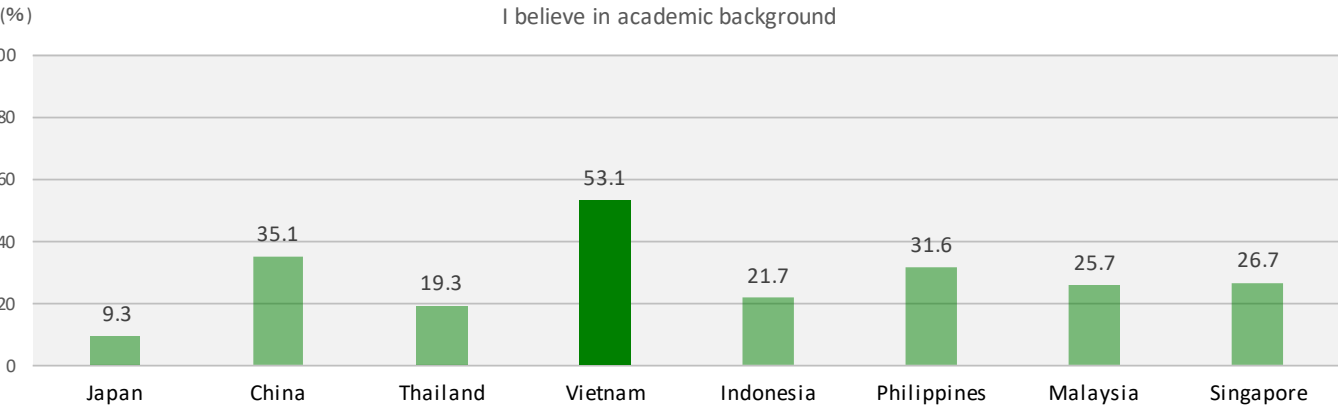


I believe in academic background

Local researcher's comment:



Vietnam ranked first at 53.1%. For historical reasons, Vietnamese *sei-katsu-sha* have a powerful yearning for freedom and independence. This survey finding demonstrates that they regard a strong academic background as the most effective way of achieving both. During home visits by Hakuodo Institute of Life and Living ASEAN, we often hear comments about wanting to obtain higher academic qualifications and go abroad, or wanting to graduate from a good university, get a good job, and make lots of money. In Vietnamese society, the harder you study, the more you get ahead or are rewarded. This Vietnamese fixation on academic qualifications is thus likely to endure.

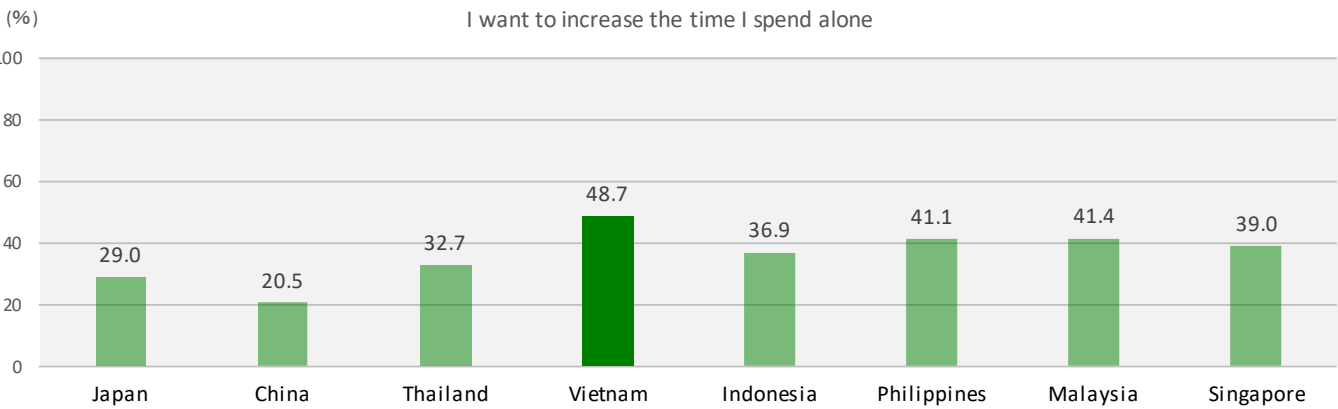


I want to increase the time I spend alone

Local researcher's comment:



Vietnam ranked first at 48.7%. Because Vietnam is a socialist country, the idea of acting together for the common good is all-pervading, and this strong desire to increase the time spent alone may be a reaction against it. Further, Vietnamese culture is strongly family-centered. Many people toil away or work their fingers to the bone for their family, so maybe it's a reaction against that.

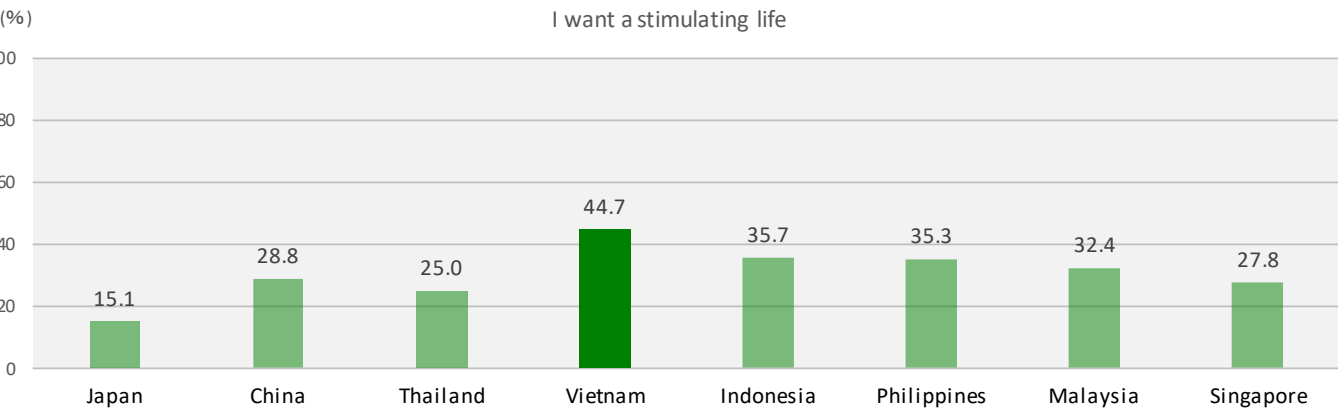


I want a stimulating life

Local researcher's comment:



Vietnam ranked first at 44.7%. Vietnamese *sei-katsu-sha* are serious, hard-working people, so maybe their greater desire for a stimulating life has arisen as a reaction against those traits.



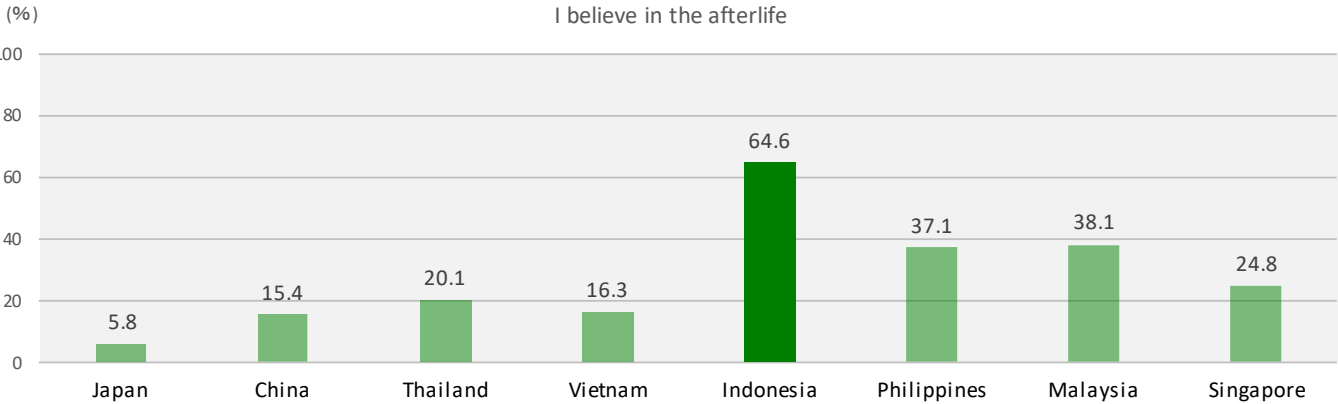


I believe in the afterlife

Local researcher's comment:



Indonesia ranked first at 64.6%. Some 90% of Indonesians are Muslim, and because of their faith, many Indonesian *sei-katsu-sha* believe in the afterlife and aspire to do good deeds. This finding reflects the way they ordinarily think and act.

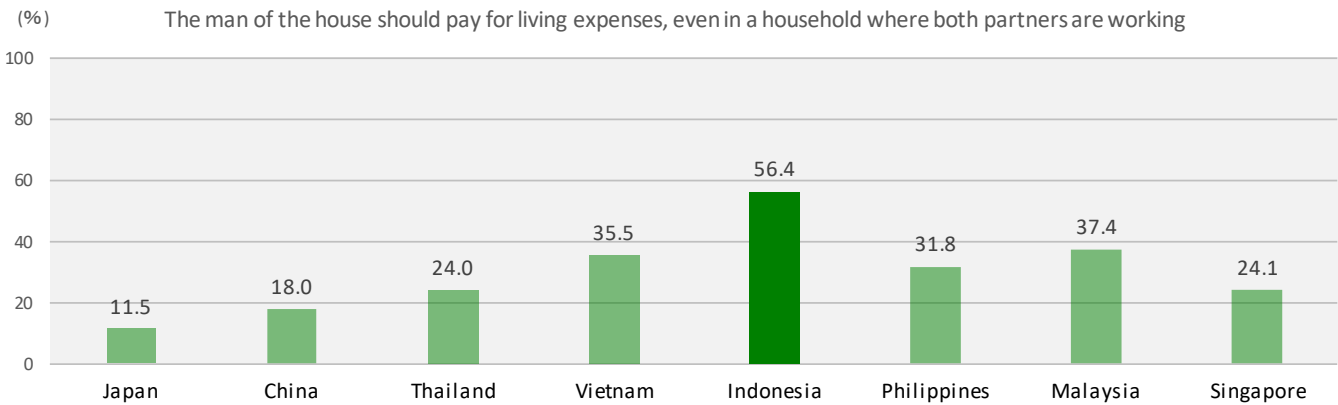


The man of the house should pay for living expenses, even in a household where both partners are working

Local researcher's comment:



Indonesia ranked first at 56.4%. It is characteristic of Indonesian *sei-katsu-sha* to accept such a conjugal arrangement.

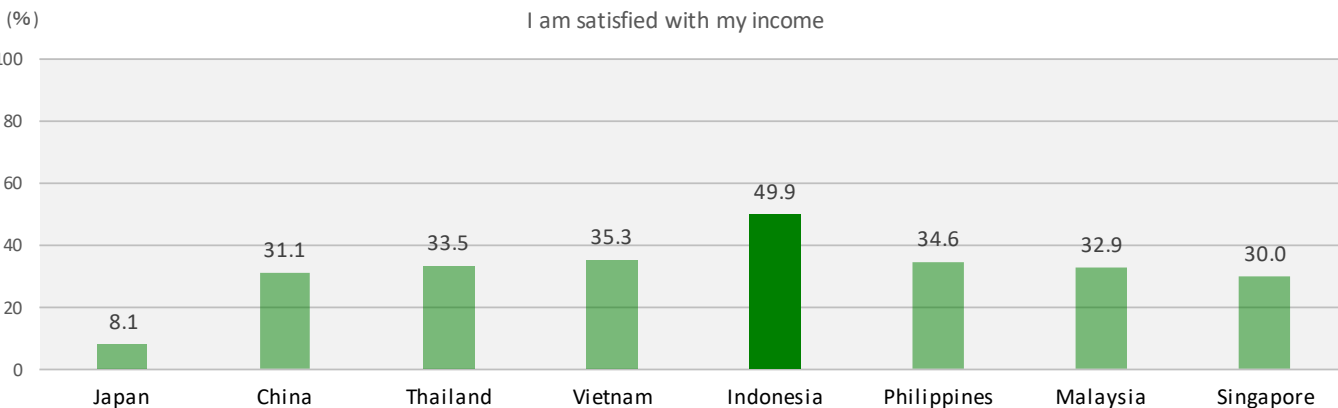


I am satisfied with my income

Local researcher's comment:



Indonesia ranked first at 49.9%. Satisfaction with income is higher than elsewhere, it seems, because the idea of being content with what one has is deeply rooted for religious reasons. Indonesia also ranked first for satisfaction with residences, including homes and property (54.1%) and satisfaction with savings (40.3%).

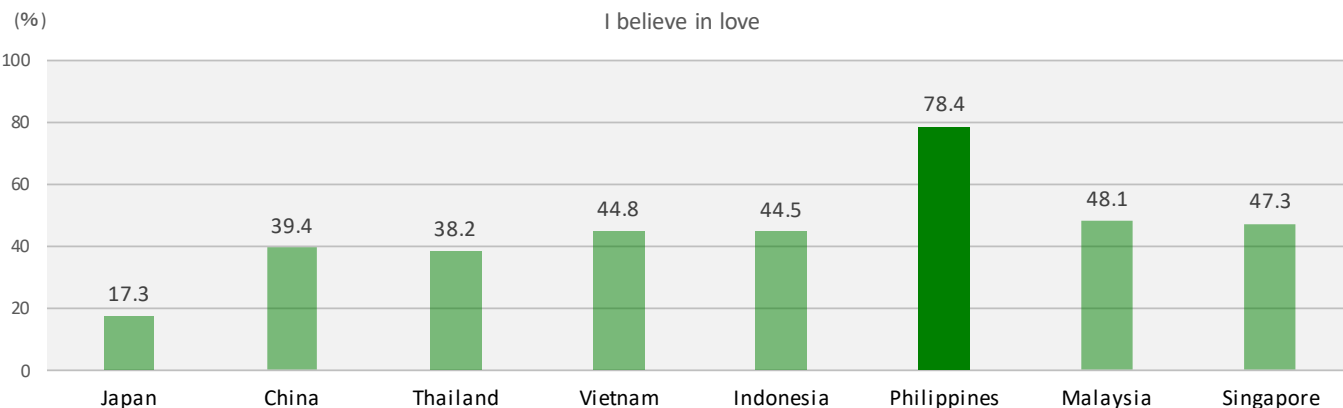


I believe in love

Local researcher's comment:



The Philippines ranked first at 78.4%. One of the reasons so many Filipinos believe in love must be because 90% of the population is Christian. Filipino *sei-katsu-sha* are really into love. They treasure their bonds with others, be it romantic love or love of family.

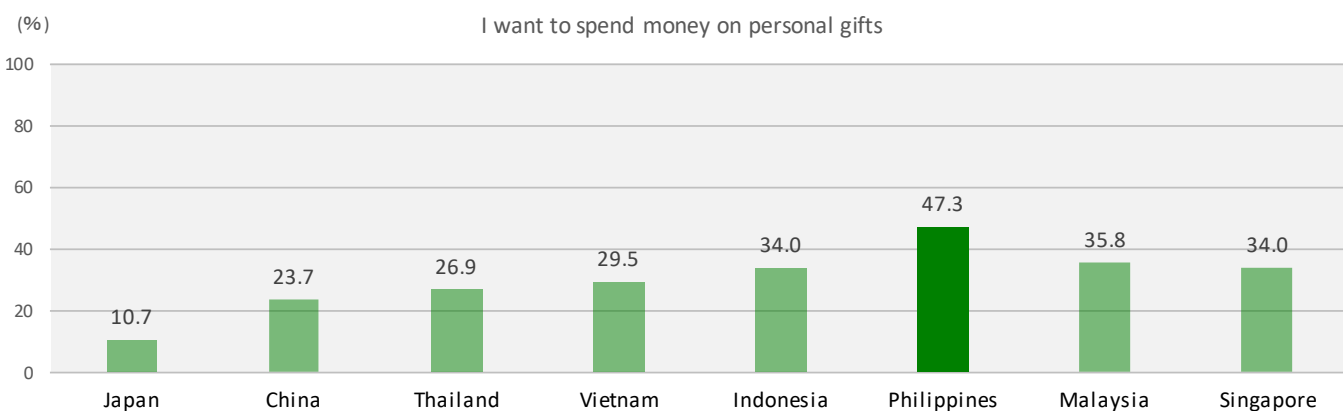


I want to spend money on personal gifts

Local researcher's comment:



The Philippines ranked first at 47.3%. Filipino *sei-katsu-sha* value their bonds with others, as noted under “I believe in love,” but many of them work abroad. So perhaps they seek to maintain their connection with faraway loved ones by sending personal gifts.



Without money, you can't be happy

Local researcher's comment:



The Philippines ranked last at 32.7%. Many Filipino *sei-katsu-sha* aim to become more affluent through their own efforts. But they tend to give priority to education, and personal relationships as well as money. This attitude appears to be reflected in their perception that how much money you have is not necessarily directly linked to how happy you are.





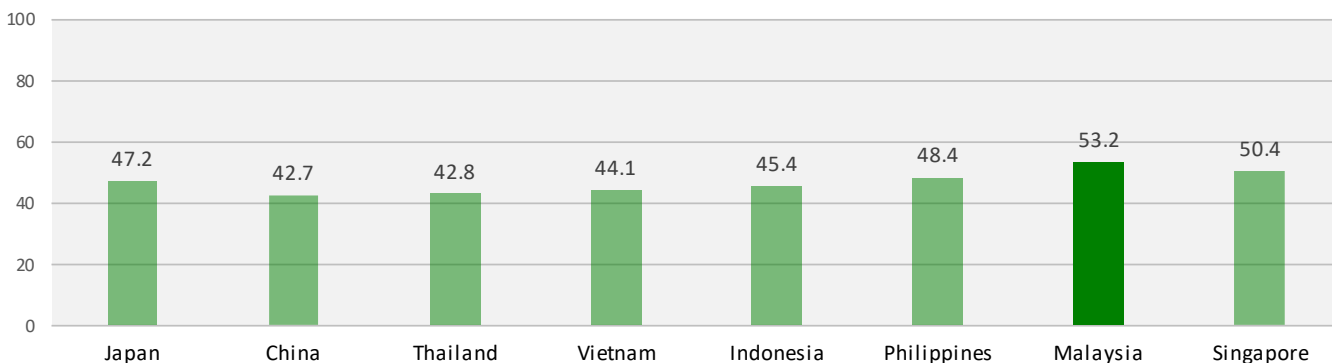
I believe in money

Local researcher's comment:



Malaysia ranked first at 53.2%. However, second-place Singapore was only 2.8 points behind at 50.4%, so Malaysia is not an outlier in this regard. Even the countries ranking third and below scored over 40%. *Sei-katsu-sha* in all eight countries appear to share a belief in the importance of money.

(%) I believe in money



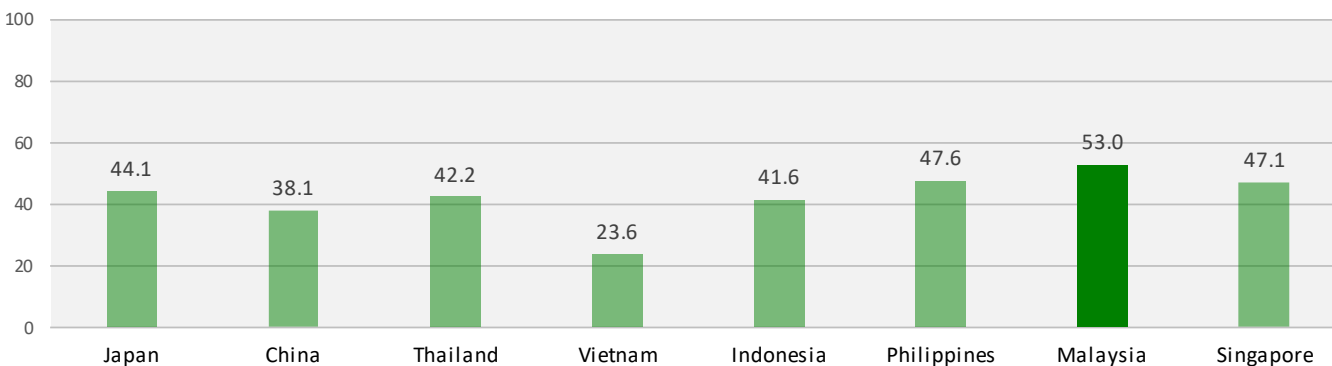
My future makes me feel stressed

Local researcher's comment:



Malaysia ranked first at 53.0%. Living as they do in a multiethnic country, Malaysians appear to have a stronger tendency than people elsewhere to constantly compare themselves to others and think, "There must be a better stage for my talents." (Many young Malaysians want to increase their income by working in Singapore or Thailand.) That, perhaps, makes them anxious about their future, creating stress.

(%) My future makes me feel stressed



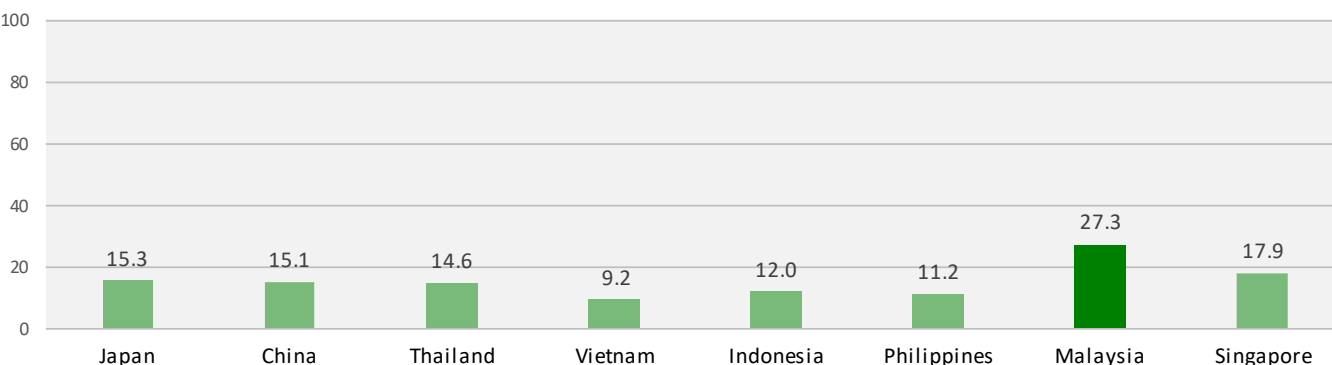
I make home loan repayments

Local researcher's comment:



Malaysia ranked first at 27.3%. A strong attachment to money and a desire to spend it sensibly appear to be characteristic of Malaysian *sei-katsu-sha*, as evidenced by the fact they "believe in money" and "make home loan repayments."

(%) I make home loan repayments





I don't mind travelling abroad alone

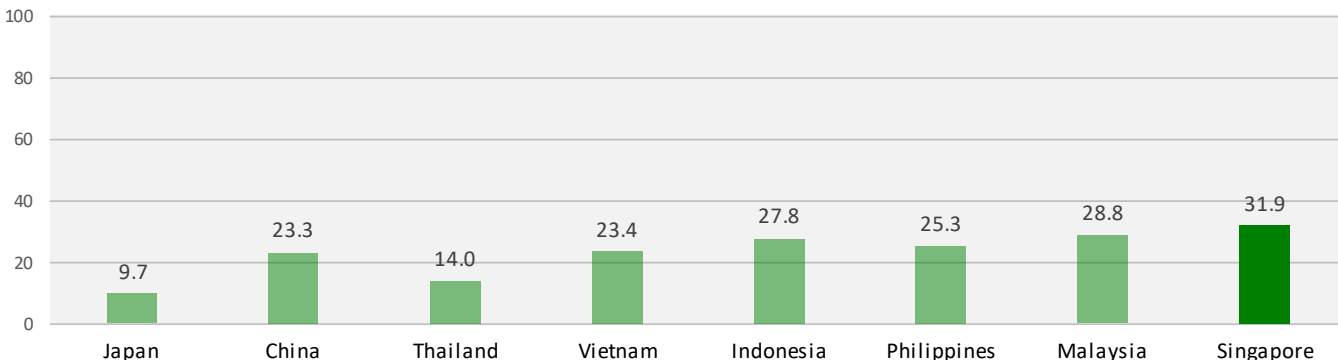
Local researcher's comment:



Singapore ranked first at 31.9%. Singaporeans live in a tiny country, and traveling abroad is a favorite pastime among them. Many Singaporeans are well-off and self-reliant. That explains why they are less likely to mind traveling abroad alone than people in the other countries.

(%)

I don't mind traveling abroad alone



I sometimes feel family relationships are bothersome

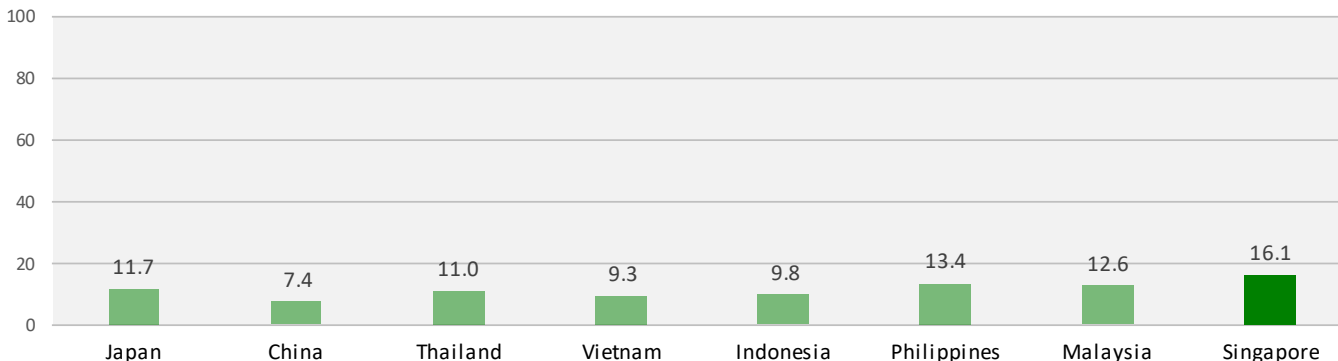
Local researcher's comment:



Singapore ranked first at 16.1%. Like people elsewhere in the ASEAN region, Singaporeans attach great importance to family relationships. But for that reason a lot of comparing and criticizing goes on within families. For example, if someone buys an expensive item, everyone else in the family wants one too. That must be why many Singaporeans find family pressure and the focus on family so stifling.

(%)

I sometimes feel family relationships are bothersome



I want to spend money on myself rather than leaving assets for my children

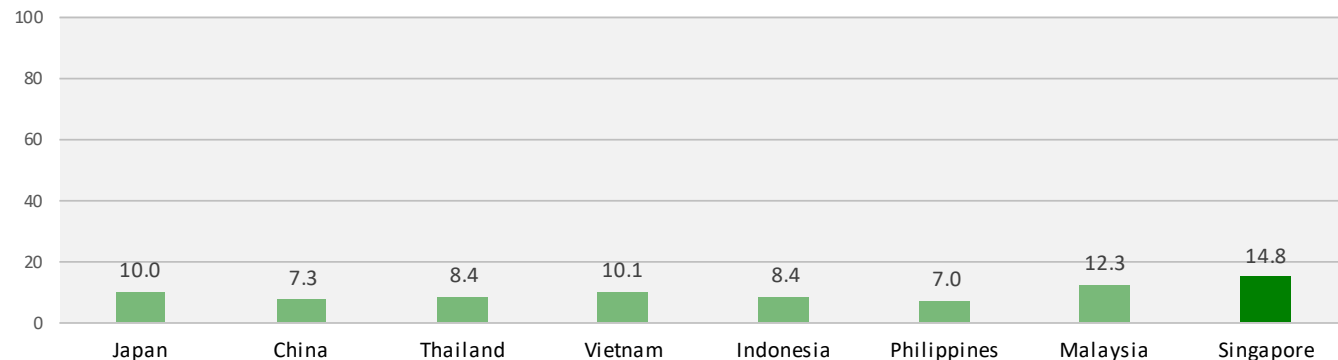
Local researcher's comment:



Singapore ranked first at 14.8%. I think it's typical of Singaporean *sei-katsu-sha* to invest lavishly in their children's education, equip them with the skills they need to earn a living, and then spend money on their own personal fulfillment and experiences. They're pragmatic. In addition, Singapore's pension program is becoming more generous. Singaporeans can expect to live reasonably well on their pension once they retire, so they have no worries about old age. That must be part of the reason they're able to spend what they've earned on themselves.

(%)

I want to spend money on myself rather than leaving assets for my children



Summing Up: Overall Observations on Japanese, Chinese, and ASEAN *Sei-katsu-sha*

The Japanese ranked first for both desiring money and wanting plenty of holidays rather than a high salary, which at first looks like a contradiction. It gives you a sense of the acute predicament of Japanese *sei-katsu-sha*. They need both money *and* time off to deal with social challenges like plummeting birthrates and a rapidly aging population.

Akemi Natsuyama, Senior Researcher, Hakuhodo Institute of Life and Living

What particularly struck me was that among Chinese *sei-katsu-sha* living in the advanced cities of Beijing, Shanghai, and Guangzhou, the percentage intending to work harder and make more money was higher than in the other countries. They're not content with their present circumstances despite enjoying the benefits of economic growth. They aim to raise their standard of living further still.

Ming Zhong, General Manager, Hakuhodo Institute of Life and Living Shanghai

In ASEAN, the results reflected each country's social circumstances and religious attitudes. While each of the countries has its own unique traits, they can all be said to have one thing in common. They're more family-centered than Japan and personal ties are closer, which accounts for several of the findings. In Thailand, Vietnam, Malaysia, and Singapore, some of the responses chosen can be seen as a reaction against these characteristics: "I desire freedom," "I want to increase the time I spend alone," "My future makes me feel stressed," "I feel family relationships are bothersome." In the Philippines ("I believe in love") and Indonesia ("I am satisfied with my income"), the results reveal how people value the positive side of human connections.

Yuko Ito, Managing Director, Hakuhodo Institute of Life and Living ASEAN

About the Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN

What is the Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN?

- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN identifies the traits of *sei-katsu-sha* in different countries by asking them questions covering some 470 items relating to all aspects of life, including consumption, money matters, information, recreation, work, health, family, love, and marriage. These are based on the questions used in the Seikatsu Teiten Survey conducted in Japan since 1992 by the Hakuhodo Institute of Life and Living.
- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN will be conducted annually. Analyzing trends over time will make it possible to trace changes in attitudes, values, and behavior patterns in different countries.
- The Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN findings will be shared with the media through news releases such as this. They will also be utilized by the Hakuhodo Group when drawing up marketing proposals for Japan, China, and ASEAN.

Overview of the Chronological Lifestyle Survey on *Sei-katsu-sha* in Japan, China and ASEAN

Survey area: Japan (Greater Tokyo and Hanshin regions)
China (Beijing, Shanghai, Guangzhou)
ASEAN (Thailand, Vietnam, Indonesia, Philippines, Malaysia, Singapore)

Sample size: 11,000 (11 areas, 1,000 people per area)

Respondents: Males and females aged 15–59 (in the ASEAN countries, filtered by household income)

Allocation:

	Japan		China			Thailand	Vietnam	Indonesia	Philippines	Malaysia	Singapore
	Greater Tokyo	Hanshin	Beijing	Shanghai	Guangzhou						
Total	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
Male	500	500	500	500	500	500	500	500	500	500	500
Female	500	500	500	500	500	500	500	500	500	500	500
15–19	110	110	110	110	110	110	110	110	110	110	110
20–29	222	222	222	222	222	222	222	222	222	222	222
30–39	224	224	224	224	224	224	224	224	224	224	224
40–49	224	224	224	224	224	224	224	224	224	224	224
50–59	220	220	220	220	220	220	220	220	220	220	220

Survey period: January 10–31, 2023

Survey method: Online survey

Design and analysis: Hakuhodo Institute of Life and Living

Implementation and tabulation: H.M. Marketing Research, Inc.

Survey cooperation: Hakuhodo Institute of Life and Living Shanghai, Hakuhodo Institute of Life and Living ASEAN

Hakuhodo Institute of Life and Living Shanghai

Hakuhodo Institute of Life and Living Shanghai, a wholly-owned subsidiary of Hakuhodo Inc. of Japan, is a think-tank established in Shanghai in 2012 to serve the Hakuhodo Group in China. Leveraging *sei-katsu-sha* research know-how amassed in Japan, the Institute supports companies' marketing activities in China, while developing local insights and making proposals on future ways of living in China.

Key activities:

- The Dynamics of Chinese People: Research that identifies the true desires of Chinese *sei-katsu-sha* and puts forward ideas for new ways of living
- New viewpoint proposal: Offering new ways of looking at *sei-katsu-sha* and markets
- Consulting & recommendations: Advice on *sei-katsu-sha* insight-based marketing activities

<https://www.shenghuozhe.cn>

Hakuhodo Institute of Life and Living ASEAN

A wholly-owned subsidiary of Hakuhodo Inc. of Japan, Hakuhodo Institute of Life and Living ASEAN was incorporated in Bangkok, Thailand, in 2014 as an in-house think tank studying *sei-katsu-sha*. It supports clients' marketing activities in ASEAN with insights into and proposals for ASEAN *sei-katsu-sha*.

Key activities:

- Research and analysis from the local perspectives of each ASEAN nation
- Forums held 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 Hakuhodo Institute of Life and Living ASEAN website:

<https://hillasean.com/>



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JAPAN / CHINA / ASEAN

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