

Hakuhodo Institute of Life and Living Shanghai unveils The Dynamics of Chinese People 2023

**Chinese *sei-katsu-sha* to make a brand-new start in a vibrant post-pandemic era
The focus is shifting from *nèi juǎn* and *tǎng píng* to *Qīng qǐ*,
or expanding one’s personal world using a light touch**

Tokyo—January 12, 2024—Hakuhodo Institute of Life and Living Shanghai (HILL Shanghai) unveiled the 11th set of findings from its The Dynamics of Chinese People research project jointly conducted with the School of Advertising at the Communication University of China at their first offline launch event in four years, in Beijing, China. The research theme for this year was “**The Real Lives of Chinese *Sei-katsu-sha*¹ Poised to Make a New Start in a New Era.**” As consumption behavior remained weak throughout 2023, we examined the situation of people in China, sensing **signs of a shift in what *sei-katsu-sha* are doing.**

In the 2010s, Chinese *sei-katsu-sha* focused on advancing toward their goals in terms of successful careers and keeping pace with social trends, against the backdrop of rapid economic growth and social transformation. As economic growth slowed and changes in their living environment became less pronounced compared with the extraordinary pace in the mid-2010s, however, people are **turning more toward their private life**, identifying their own goals to **expand their personal world in multiple directions, not merely chasing after the latest trends.** In this year’s research, we found that Chinese *sei-katsu-sha* are **starting to move toward their own goals using a lighter touch, without putting too much pressure on themselves.** We thus characterized the current behavior of Chinese *sei-katsu-sha* as “***Qīng qǐ*,**” **expanding their personal world at their own pace using a light touch.**



¹ “*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.

HILL Shanghai believes that the trend points to a new attitude developing among Chinese *sei-katsu-sha*, which is different from those observed in recent years including *nèi juǎn* (be mired in excessive competition with school or work peers) and *tǎng píng* (“lie flat,” or lose motivation to work hard).

At the launch event on January 11, HILL Shanghai gave a briefing on the real lives of Chinese *sei-katsu-sha* seeking a lifestyle to match the new era, as exemplified by the *Qīng qǐ* behavior. It also made a presentation on how businesses should modify their marketing activities in line with this *Qīng qǐ* movement.

For the report distributed at the launch (available in Japanese and Chinese), please contact HILL Shanghai at: news@hakuhodo-shzy.cn

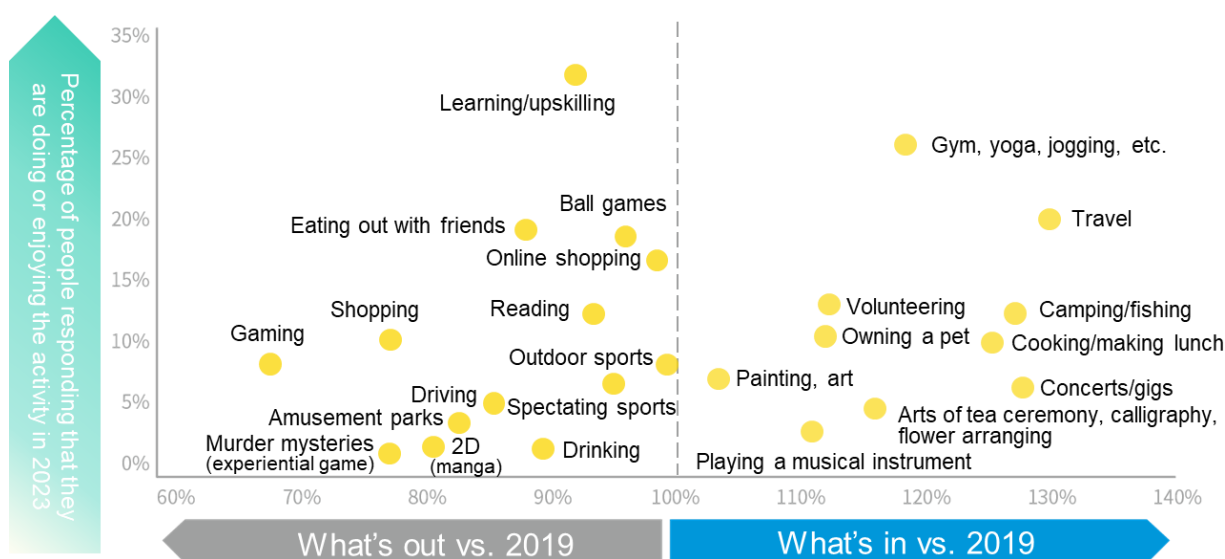
Data

(1) Changes in what Chinese *sei-katsu-sha* are doing

More people are enjoying individual hobbies at the expense of learning/upskilling, gaming and team sports.

A look at what *sei-katsu-sha* are actively doing or enjoying reveals a shift from 2019 toward a **variety of hobbies that they can start on their own, including the arts of tea ceremony, calligraphy and flower arranging, and painting and cooking, in addition to volunteering, travel, and recent fads like camping and owning a pet, at the expense of learning/upskilling, gaming, ball games and other team sports, and eating out with friends** (Data 1).

Data 1: Things that Chinese *sei-katsu-sha* are doing or enjoying (2023 vs. 2019)



* For analysis purposes, the horizontal axis indicates the change in response in 2023 vs. 2019 and the vertical axis shows the percentage of people responding that they are doing or enjoying the activity in 2023

(2) Context of the changes in things that Chinese *sei-katsu-sha* are doing

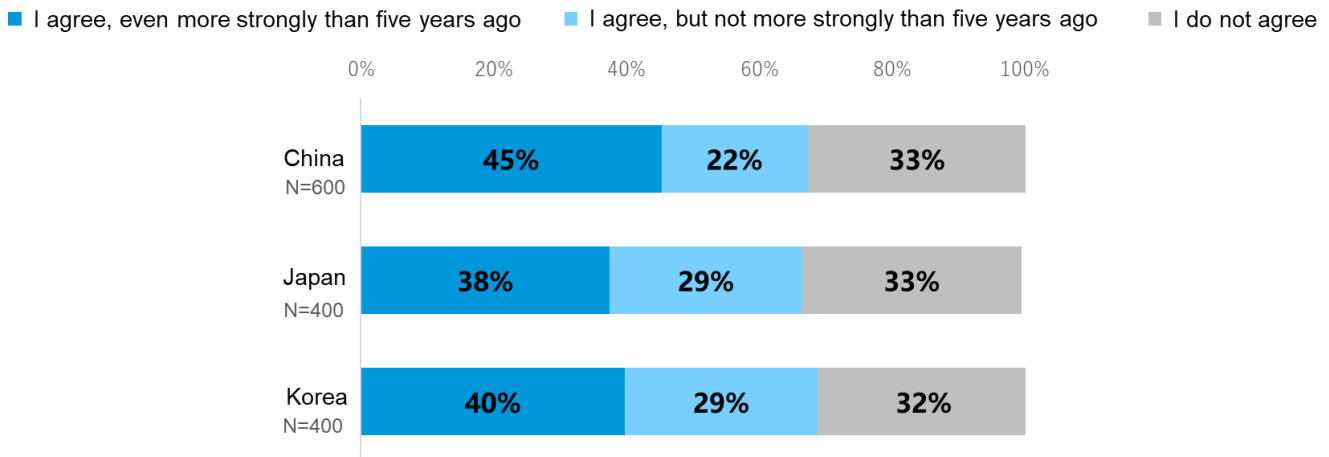
Shifting their focus from communities/groups to the individual, *sei-katsu-sha* in China have found what they really want to do and are beginning to set their own goals.

China has led the world in the digitalization of life and living, but changes in their living environment have slowed in recent years. Furthermore, an increasing number of Chinese *sei-katsu-sha* are feeling somewhat unfulfilled with aimlessly spending even more time watching the ever-expanding content on their smartphone (Data 2). As they feel fewer chances for a promotion or a pay raise at work (Data 3), Chinese *sei-katsu-sha* are apparently less inclined than before to acquire useful knowledge or skills that might assist them with their jobs.

Accordingly, more *sei-katsu-sha* are **putting more emphasis on their private lives than on a successful/self-fulfilling career, seeking more fulfillment in their lives by enriching their hobbies** (Data 4). Consequently, we might be witnessing a shift from an era when people's objectives were to achieve a successful career and keep pace with changes and trends in society, to an era of prioritizing the enrichment of private life, **setting their own goals and looking to expand their personal world in multiple directions.**

Data 2: Changing attitudes toward spending time on a smartphone

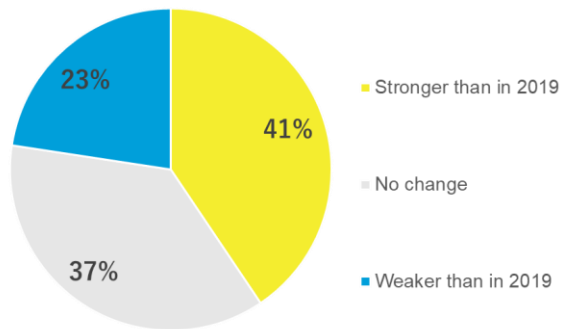
“I’m spending too much time on my smartphone.”



Source: “Survey on Lifestyle and Behavioral Changes in China, Japan and Korea,” Hakuodo Institute of Life and Living Shanghai

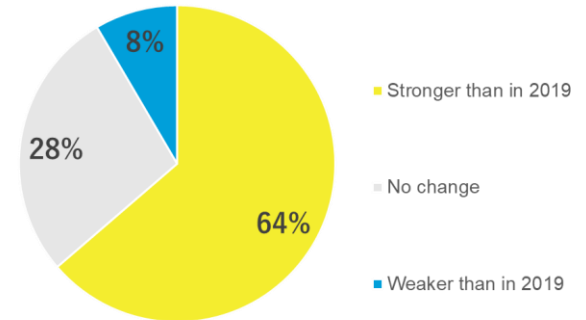
Data 3: Changing attitudes toward promotions/pay raise

Perception of less chance of promotion or pay raise



Data 4: Changing attitudes toward private life

Preference for private life over successful career



Source: "Survey on Lifestyle Changes among Chinese *Sei-katsu-sha*," Hakuhodo Institute of Life and Living Shanghai

(3) Perceived hurdles for Chinese *sei-katsu-sha* in initiating something new, and how they address them

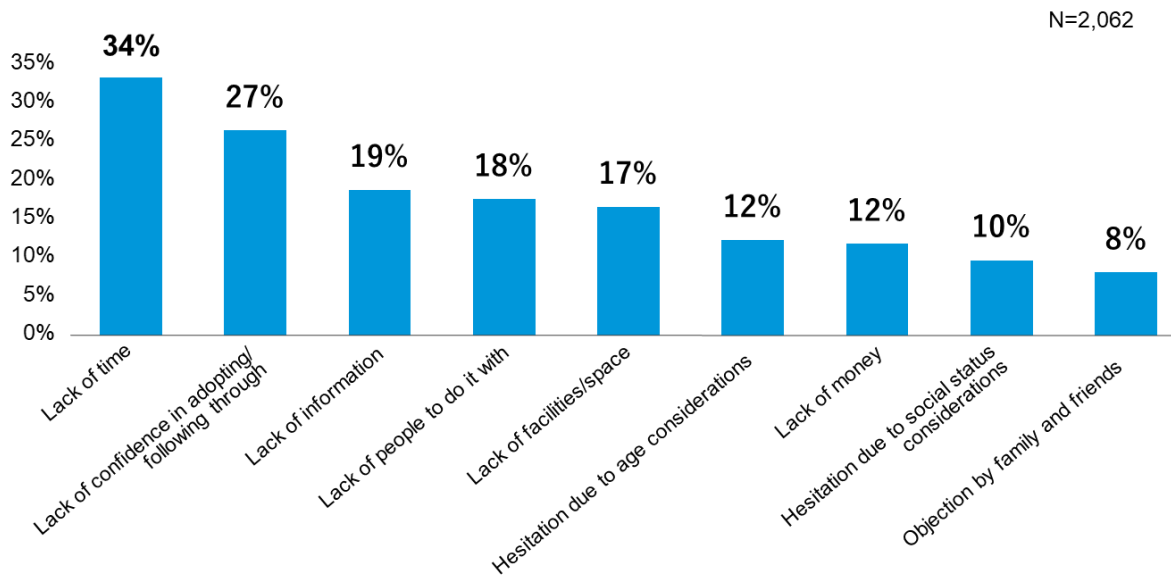
Specific hurdles include: Lack of time, lack of confidence in adopting/following through, lack of information and lack of people to do it with. But instead of tackling these challenges head on, Chinese *sei-katsu-sha* are finding ways to overcome or dodge these obstacles with a light touch.

People face hurdles when deciding to initiate and follow through with something new. Asked about the difficulties of starting and continuing something new, the No. 1 response among Chinese *sei-katsu-sha* was **Lack of time**. Lack of money was less of a concern, coming in at No. 7. Other **major obstacles included: Lack of confidence in adopting/following through (No. 2), Lack of information (No. 3) and Lack of people to do it with (No. 4)** (Data 5).

Through an interview about how they are overcoming those hurdles, we found that Chinese *sei-katsu-sha* are **mostly overcoming or dodging the hurdles using a light touch, without putting too much pressure on themselves** (Data 6).

Data 5: Perceived hurdles when starting or following through with something new

(Base: Respondents who reported to have started something new)



Source: "Survey on Lifestyle Changes among Chinese *Sei-katsu-sha*," Hakuodo Institute of Life and Living Shanghai

Data 6: Perceived hurdles when starting or following through a new hobby/learning activity, and how they address them

	Outline of the hurdle	How they address the hurdle
Lack of confidence in starting/following through	Feel psychologically uncertain, wondering if they are capable of doing the new thing and keeping it going.	As more people are seeking to start something that cannot be evaluated objectively, including by passing an exam or improving a score, they devise a way to keep up motivation with minimum pressure , such as visualizing the outcome of their own efforts or creating opportunities to be praised by someone.
Lack of information	Although information is available, what's available on social media and the internet is not systematic or reliable, being too fragmented or dramatized.	Rather than searching for information on social media and the internet, they collect credible information without spending too much time and effort , including by directly asking questions of someone with relevant expertise at a live streaming event or observing someone who is already enjoying the hobby they want to start.
Lack of people to do it with	Since everyone is doing their own thing, they don't have or struggle to find people to share their hobbies with. Increasingly focused on themselves, however, they don't want to start or continue something with someone they have no common ground with.	Rather than subscribing to a community to make longer-term friends, they find someone they feel an affinity with casually , including finding someone to share a hobby with for a day on the internet, or joining an event with their family, neighbors, or even a pet.

Sources: Adapted from "Interview Study on Chinese *Sei-katsu-sha* Making a New Start in 2023" and "China Trend Watch," a collection of case studies for trend analysis, Hakuodo Institute of Life and Living Shanghai

(4) Keyword to describe the behavior of Chinese *sei-katsu-sha* going forward

From *nèi juǎn* and *tǎng píng* to *Qīng qǐ*, or expanding one's personal world using a light touch

HILL Shanghai found that **Chinese *sei-katsu-sha* are setting their own goals and looking to expand their personal world in multiple directions. And they are using a light touch to overcome or dodge the hurdles faced in attaining these goals.** It dubbed this new behavior ***Qīng qǐ***, which means **expanding one's personal world at one's own pace using a light touch.**

Nèi juǎn (be mired in excessive competition with school or work peers) and *tǎng píng* (“lie flat,” or lose motivation to work hard) have been keywords among Chinese *sei-katsu-sha* in recent years. With slowing economic growth and social environment change, merely winning amid harsh competition no longer ensures a reasonable return. They would rather take it a bit easier and “lie flat.” Chinese *sei-katsu-sha* often used these keywords to describe their own living situation.

In 2023, as the post-pandemic era became a reality, however, *sei-katsu-sha* started doing something different on their own. Even when faced with hurdles in initiating or following through with something, they continue to move forward by overcoming or dodging the hurdles using a light touch, without putting too much pressure on themselves. Even though Chinese *sei-katsu-sha* still engage in *nèi juǎn* or talk about *tǎng píng* sometimes, HILL Shanghai believes that **their emerging attitude is best characterized by the word *Qīng qǐ***. It remains committed to monitoring relevant developments.



Outline of surveys conducted in relation to this research

■ Survey on Lifestyle Changes among Chinese *Sei-katsu-sha*

Sample size: 3,000

Respondent qualifications: Males and females aged 20–49, living in Tier 1–3 cities

Survey method: Internet survey

Survey period: December 2023

Conducted by: Shanghai Zhongyan Network Technology Co., Ltd.

■ Interview Study on Chinese *Sei-katsu-sha* Making a New Start in 2023

Sample size: 22

Respondent qualifications: Males and females aged 20–49, living in Tier 1–3 cities

Survey method: One-on-one in-depth interviews

Survey period: October–November 2023

Conducted by: Shanghai Horizon Research Co., Ltd.

■ Survey on Lifestyle and Behavioral Changes in China, Japan and Korea

Sample size: 1,400

Countries surveyed: China (Beijing, Shanghai, Guangzhou), Japan (Tokyo, Osaka) and Korea (Seoul, Busan)

Respondent qualifications: Males and females aged 20–49

Survey method: Internet survey

Survey period: September 2023

Conducted by: Opinion Research Shanghai Boyu Co., Ltd.

● Hakuodo Institute of Life and Living Shanghai

HILL Shanghai, a wholly owned subsidiary of Hakuodo Inc. of Japan, is a think-tank established in Shanghai in 2012. 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
- Research on specific themes: Analysis of specific product categories including automobiles and cosmetics, and of specific *sei-katsu-sha* segments such as young people and high net worth individuals
- Consulting and recommendations: Advice on *sei-katsu-sha* insight-based marketing activities

The Dynamics of the Chinese People is a joint presentation of research findings by HILL Shanghai and the School of Advertising at the Communication University of China. Held annually, The Dynamics of the Chinese People research presentations analyze changes in the behavior and desires of Chinese *sei-katsu-sha*, and put forward unique keywords.

Qīng qǐ is the project's 11th set of findings, following *Yùn yù* in 2022.

■ About Hakuodo

Founded in 1895, Hakuodo 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 Hakuodo DY Holdings, the world's 8th largest agency company according to *Ad Age's* "Agency Report 2023."

Sei-katsu-sha insight is the foundation for Hakuodo'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. Hakuodo 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, Hakuodo combines creativity, integrative capabilities, and data and technology to play a leading role in evolving companies' marketing activities and generating innovation for the 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

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