

Global Chronological Lifestyle Survey on *Sei-katsu-sha* 2025 results announced  
Salient responses across the nine countries include:

Japan: I am satisfied with a stable job and working environment (25.6%, ranked 9th, up 4.3 pts vs. 2023).  
China: I desire dreams (24.1%, ranked 1st, up 3.9 pts vs. 2023).  
Thailand: My spouse and I equally divide household chores, work, etc. (71.7%, ranked 1st, up 4.1 pts vs. 2023).  
India: I want to increase the time I spend on shopping (40.1%, ranked 1st).

Since 2023, 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 been conducting an annual Global Chronological Lifestyle Survey on *Sei-katsu-sha*, designed to identify the lifestyles and behaviors of *sei-katsu-sha*—Hakuhodo’s term for the holistic person—inside and outside Japan. The third, most recent survey was conducted in nine countries including India, in addition to Japan, China and ASEAN (online survey of 13,000 males and females aged 15–59; see p. 11 for an overview).


This news release presents the most revealing data (top/bottom responses among the nine countries, significantly increasing or decreasing responses in each country) as selected by researchers based in Japan, China, ASEAN and India, along with their analyses.

Salient responses emerging from comparison among the nine countries

	<u>Japan</u>	<div>■ I am satisfied with a stable job and working environment.</div> <div>The rising satisfaction may be attributed to the increasing number of companies implementing workstyle reform.</div>	Response rate in 2025 (rank among the 9 countries)	Change 2025 vs. 2023
			25.6% (9th)	Up 4.3 pts
	<u>China</u>	<div>■ I desire dreams.</div> <div>The result implies the attitude of <i>sei-katsu-sha</i> actively exploring their own "life course" going forward.</div>	24.1% (1st)	Up 3.9 pts
	<u>Thailand</u>	<div>■ My spouse and I equally divide household chores, work, etc. (married respondents only).</div> <div>Many couples live with their parents, who generally take care of their children while they work.</div>	71.7% (1st)	Up 4.1 pts
	<u>Vietnam</u>	<div>■ The merit system is a rational system.</div> <div>Everybody seems to be working and studying hard, believing that tomorrow will be better than today.</div>	42.3% (1st)	Up 5.2 pts
	<u>Indonesia</u>	<div>■ I want to increase the time I spend on work and study.</div> <div>With the growing population and economy, people might be focused on keeping pace with others.</div>	58.9% (1st)	Up 5.7 pts
	<u>Philippines</u>	<div>■ I don't mind working abroad.</div> <div>Many people go to work abroad, driven by economic factors and English proficiency.</div>	50.1% (1st)	Up 5.7 pts
	<u>Malaysia</u>	<div>■ I get worried even about little changes in my physical condition.</div> <div>The door-to-door survey revealed that many families had health food and exercise equipment at home.</div>	30.5% (1st)	Up 6.2 pts
	<u>Singapore</u>	<div>■ I am using a credit card loan service.</div> <div>The high cost of living might be getting even higher as prices continue to rise due to recent global developments.</div>	17.1% (4th)	Up 8.2 pts
	<u>India</u>	<div>■ I want to increase the time I spend on shopping.</div> <div>Amid significant economic growth in recent years, people tend to seek more material prosperity.</div>	40.1% (1st)	— (Initial survey)

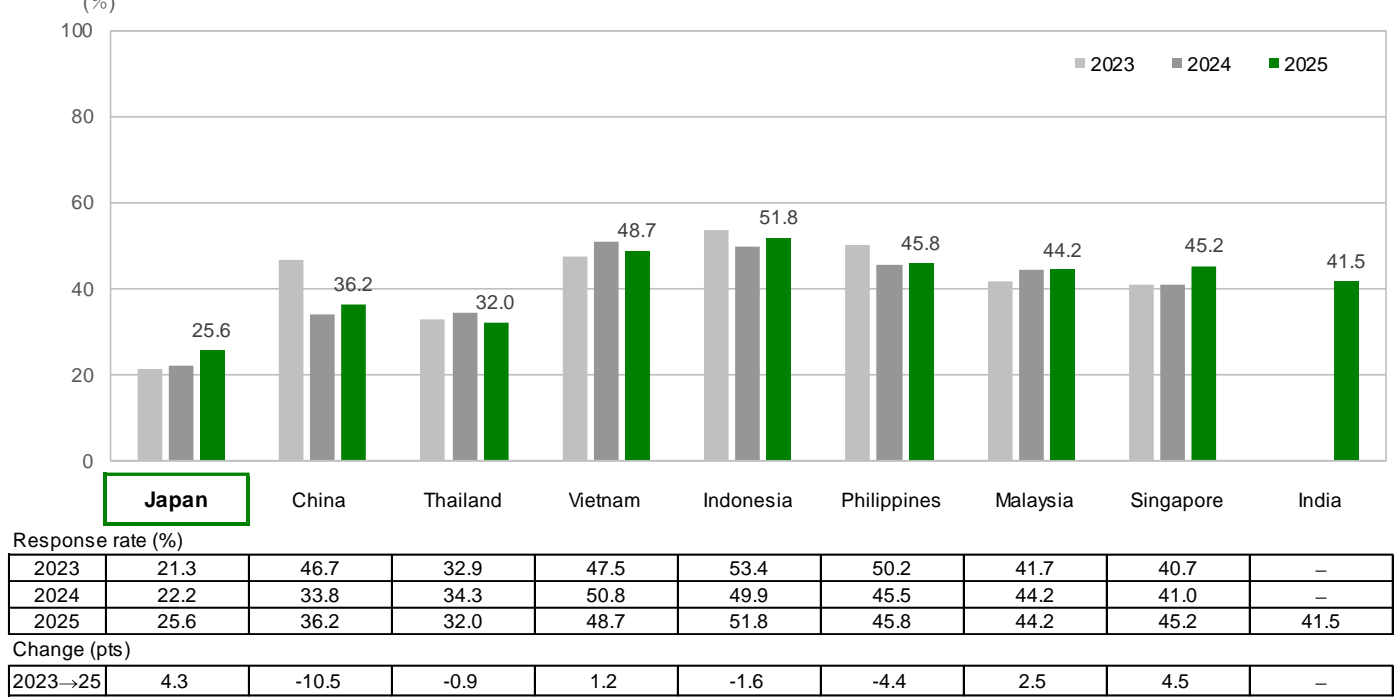
### I am satisfied with a stable job and working environment.

Local researcher's comment




Japan ranked last at 25.6%, up 4.3 pts from 2023. The lowest percentage of people satisfied with a stable job and working environment among the nine countries might be because more *sei-katsu-sha* in Japan than in other countries consider that they are not working in a good environment. Nonetheless, the gradually rising level of satisfaction may be attributed to the increasing number of companies adopting workstyle reform measures as the Japanese labor market becomes more fluid, such as the introduction of remote work and flexible time systems, improvement of operational efficiency through digitalization, reduction in long working hours, deregulation of side jobs and measures against harassment.

I am satisfied with a stable job and working environment.



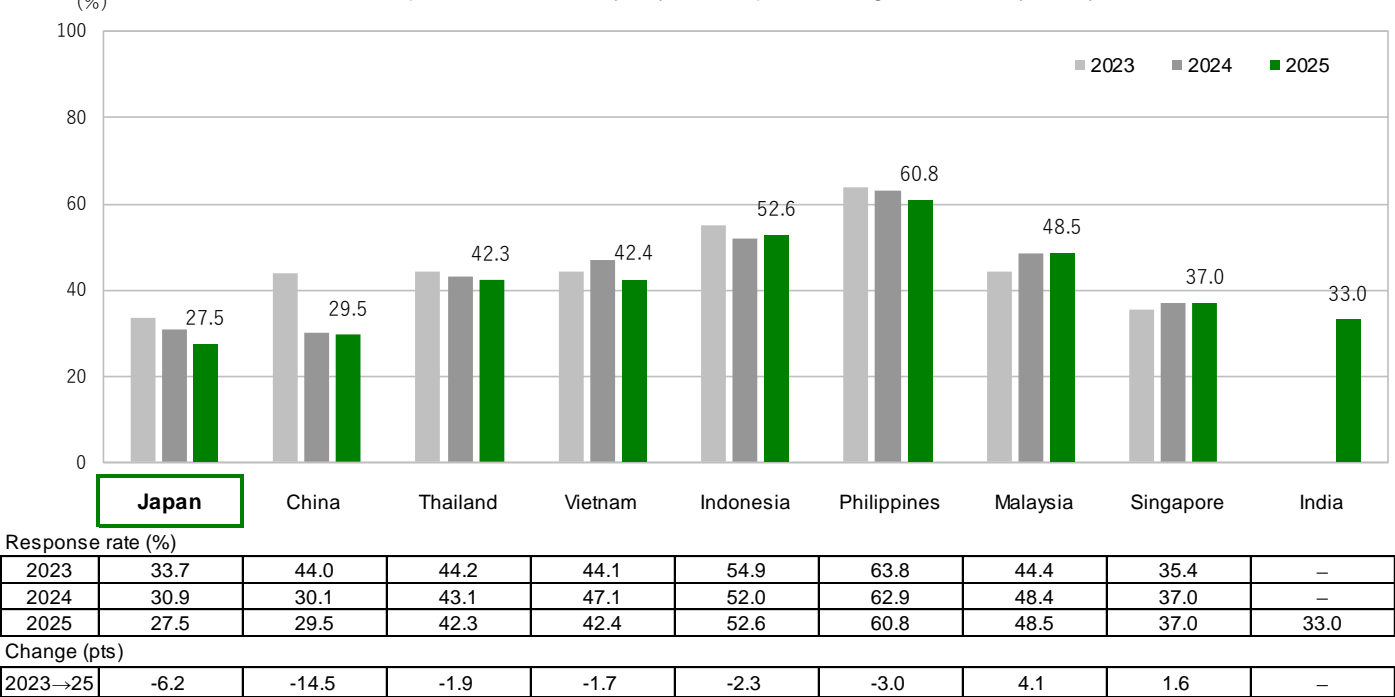
### I want to spend as much of my days off as possible together with my family.

Local researcher's comment



Japan ranked last at 27.5%, down 6.2 pts from 2023. Japan also ranked last in "I want to increase the time I spend with close friends" at 21.2%, down 3.0 pts from 2023. The result indicates that the Japanese place priority on time spent alone over time spent with family and friends. Factors behind this change in attitude seem to include the increase in double-income households, requiring family members to act separately, and reaction against 24/7 interpersonal contact made possible by digitalization.

I want to spend as much of my days off as possible together with my family.



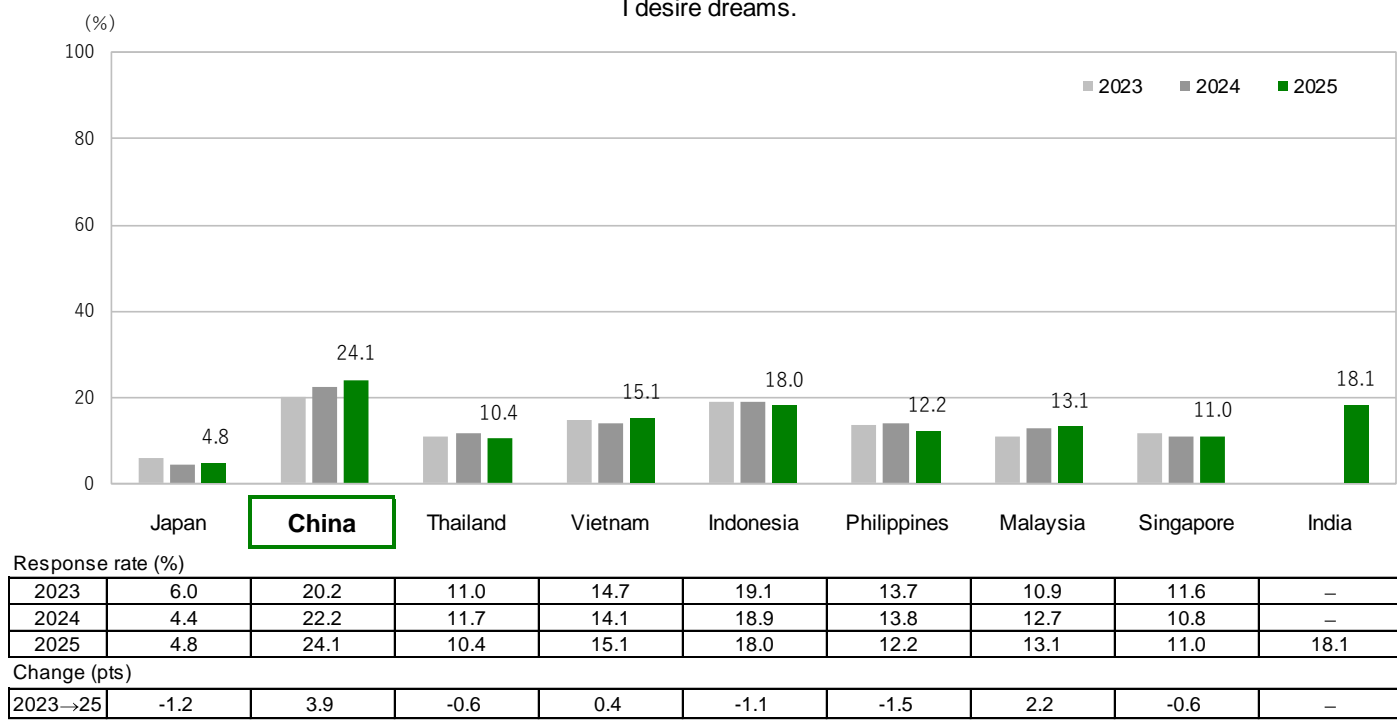
I desire dreams.

Local researcher's  
comment



China ranked first at 24.1%, up 3.9 pts from 2023, the largest change among the nine countries. After having focused on success in their career and finances, more people are now feeling the stress of stagnating living standards caused by the economic downturn. Meanwhile, the increasing number of people attending evening hobby classes for adults after work on cooking, music and dance, among others, or opening a “home bar” to invite like-minded people via social media for conversation on values and hobbies, indicates a new attitude among *sei-katsu-sha* of actively exploring their own “life course” going forward while getting rid of stress.

I desire dreams.



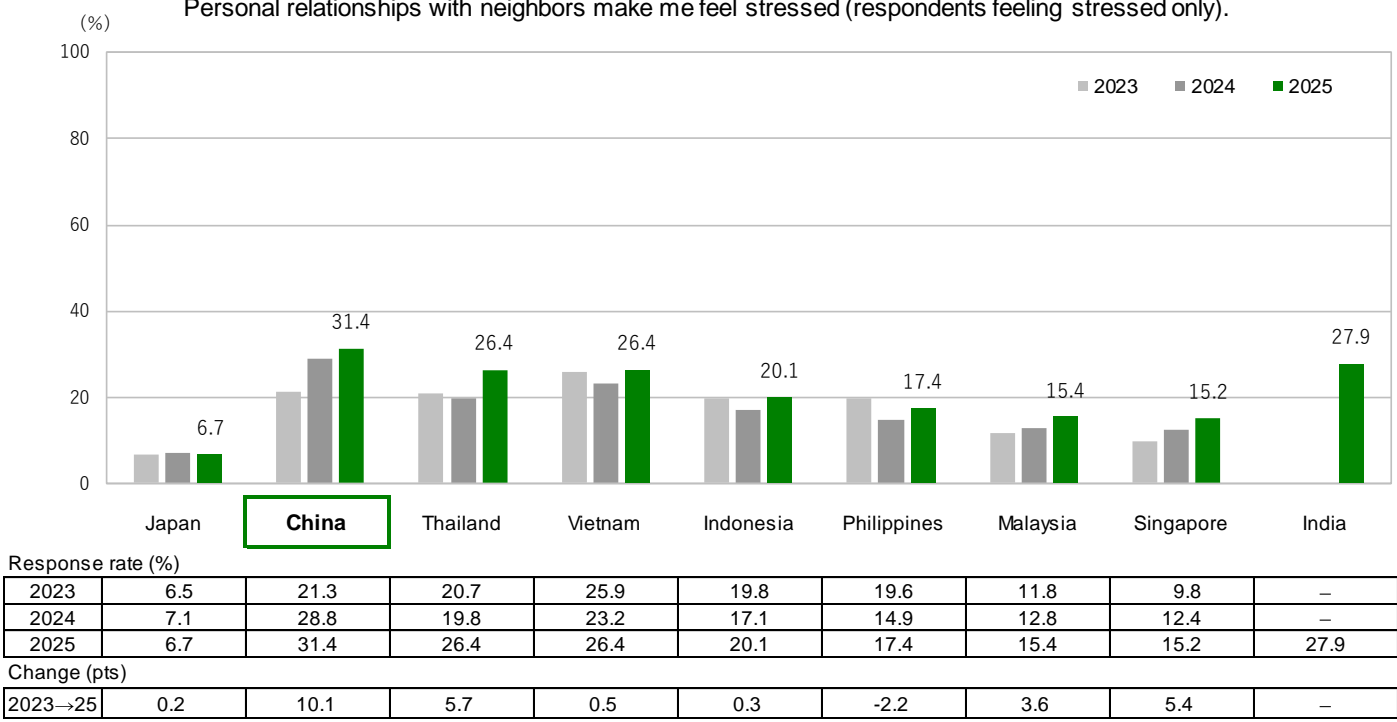
Personal relationships with neighbors make me feel stressed (respondents feeling stressed only).

Local researcher's  
comment



China ranked first at 31.4%, up 10.1 pts from 2023, recording the largest change among the nine countries. The spread of community chat / group chat apps among condominium residents in recent years has helped enhance ties among neighbors in China. While people have come to exchange children's items and books, and share information on living in these chats, the visualization of neighbors led to more conversations about troubles involving noise and pets, thus revealing the difficulties of closely-knit communities.

Personal relationships with neighbors make me feel stressed (respondents feeling stressed only).



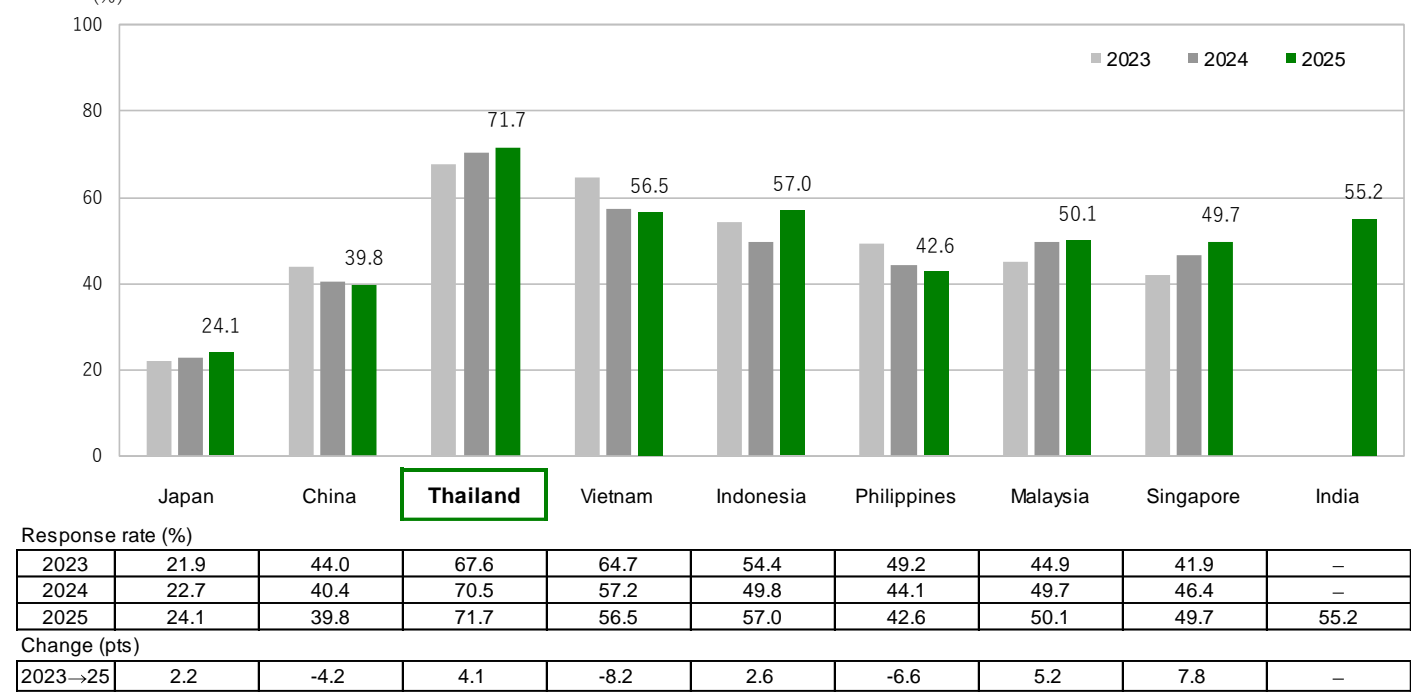
■ **My spouse and I equally divide household chores, parenting, work, etc. (married respondents only).**

Local researcher's  
comment



Thailand ranked first at 71.7%, up 4.1 pts from 2023. In the World Economic Forum (WEF)'s gender gap index, Thailand ranked 65th and Japan 118th, respectively (Global Gender Gap Report 2024)—a result supported by the attitude of *sei-katsu-sha*. Indeed, an overwhelming majority of employees at advertising companies in Thailand are women, while business units are routinely led by female leaders in many companies. At work, women are seldom treated unfairly just because they are women. Furthermore, couples in Thailand often live with their parents, receive three months of childcare leave, and generally ask parents to take care of their children while at work. Other enablers for both men and women to work at and out of home include the availability of domestic helpers and nannies, and the well-established practice of eating out and home-meal replacement.

My spouse and I equally divide household chores, parenting, work, etc. (married respondents only).



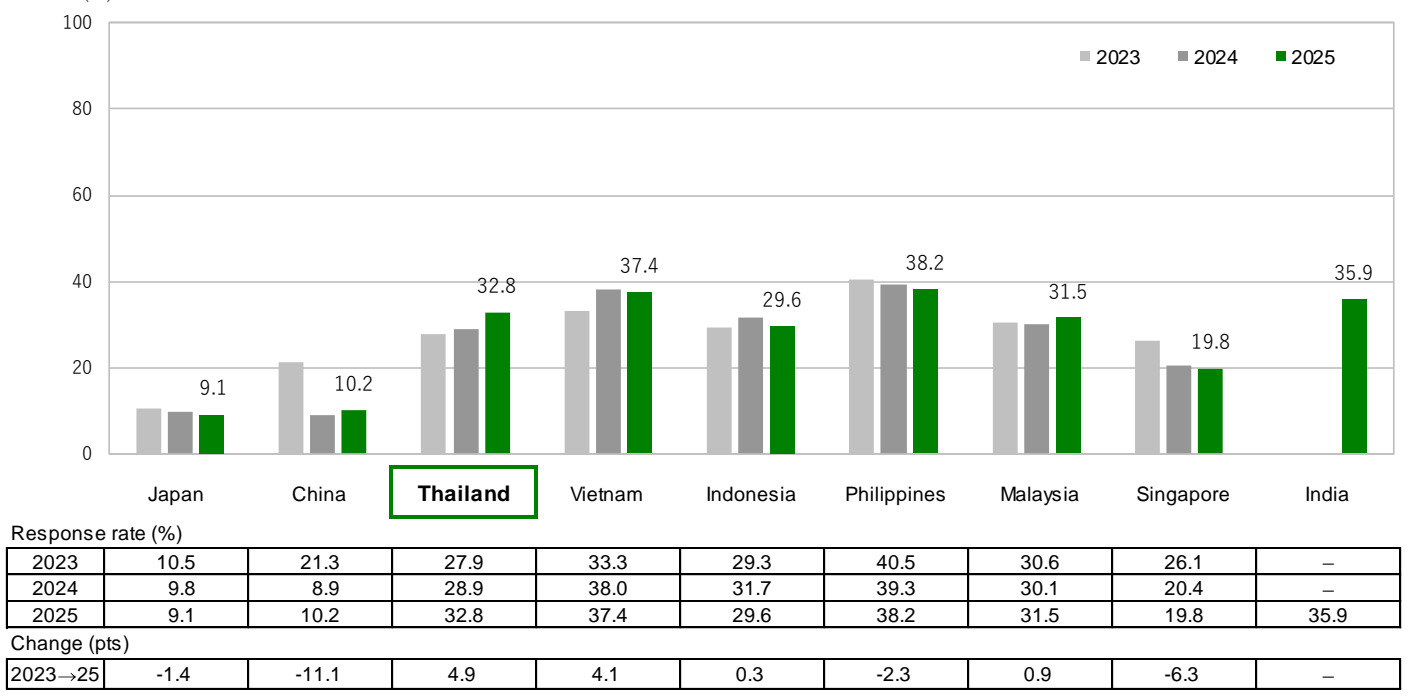
■ **I am interested in information on environmental issues.**

Local researcher's  
comment



Thailand ranked fourth at 32.8%, up 4.9 pts from 2023, while many other countries recorded a decline or stayed unchanged. Recently, air pollution with PM2.5 has been one of the biggest environmental issues in Thailand. The number of people suffering from heat stroke has also been on the rise, even though Thai people in general should be used to hot weather after so many heat waves. Children are among the first to suffer under such extreme conditions. Many schools are measuring air pollution and sunlight indicators on a daily basis to prohibit outdoor activities above certain thresholds. Many express concern about the current environmental problems threatening the healthy growth of children and their future impact.

I am interested in information on environmental issues.

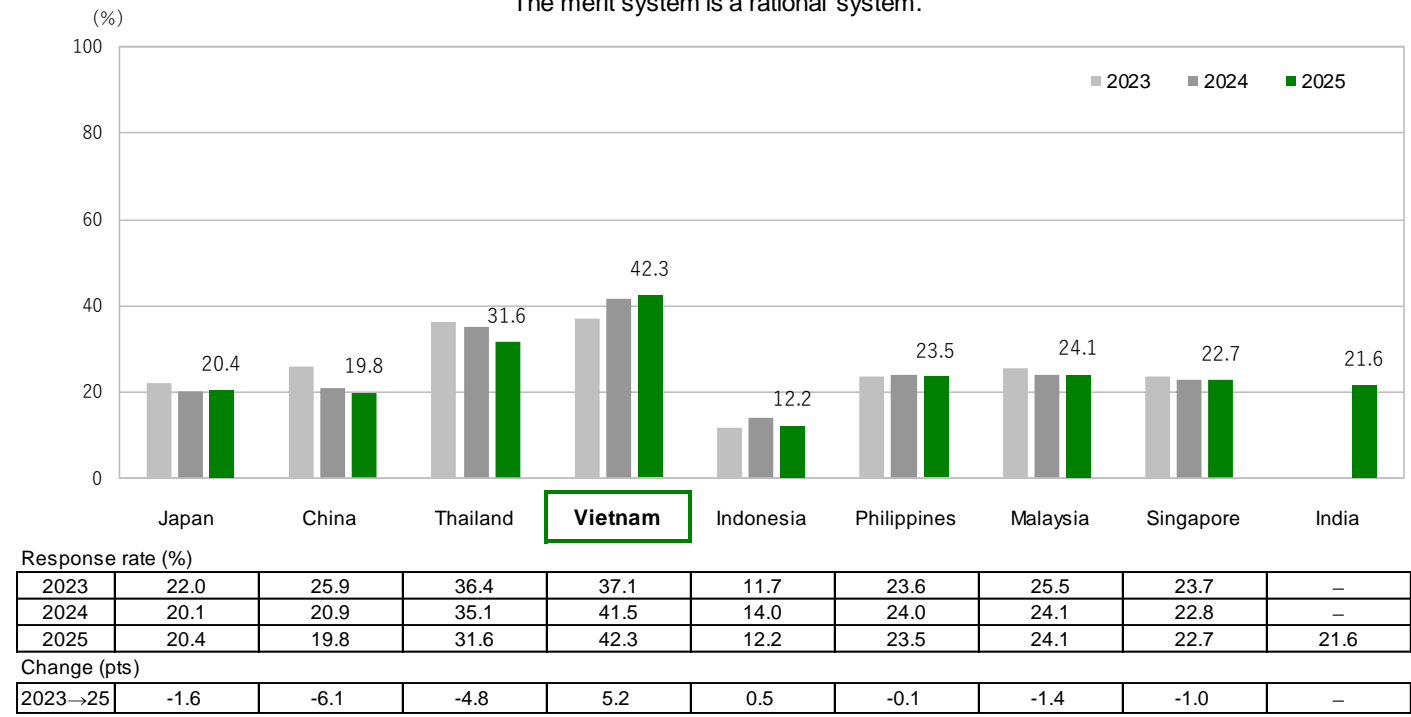


The merit system is a rational system.

Local researcher's  
comment

Vietnam ranked first at 42.3%, up 5.2 pts from 2023, while many other countries recorded a decline or remained unchanged. Vietnam today is filled with the excitement and vibrancy that Japan experienced during its rapid growth era, with everyone working and studying hard in the belief that tomorrow will be better than today. Through contact with Vietnamese *sei-katsu-sha*, they seem compelled to do everything all the time at full pace: making lots of money, getting a good position at work, and taking care of family members. *Sei-katsu-sha* are apparently taking on those challenges as a matter of course.

The merit system is a rational system.

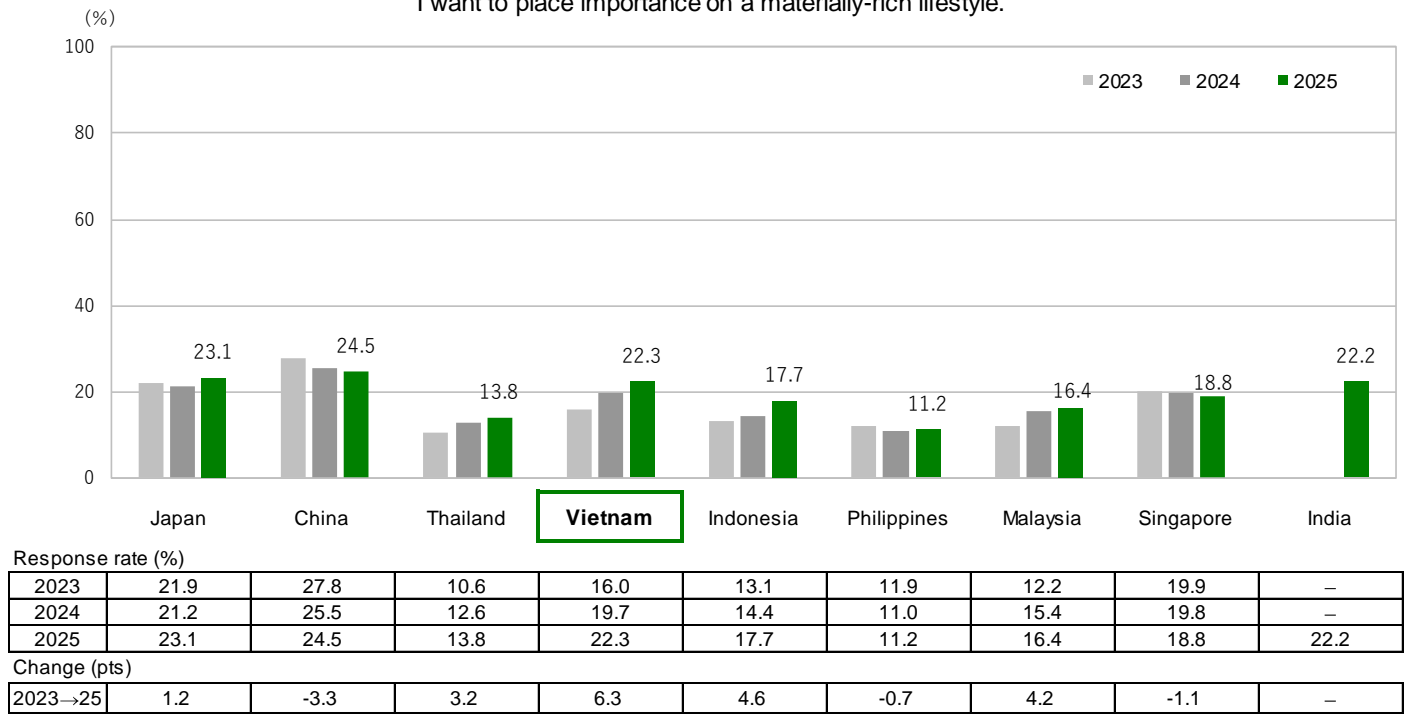


I want to place importance on a materially-rich lifestyle.

Local researcher's  
comment

Vietnam ranked third at 22.3%, up 6.3 pts from 2023, the largest change among the nine countries. The above-mentioned support for meritocracy and the emphasis on a materially-rich lifestyle over a lifestyle with spiritual richness and no pressure appear to reflect the goals of Vietnamese *sei-katsu-sha*.

I want to place importance on a materially-rich lifestyle.

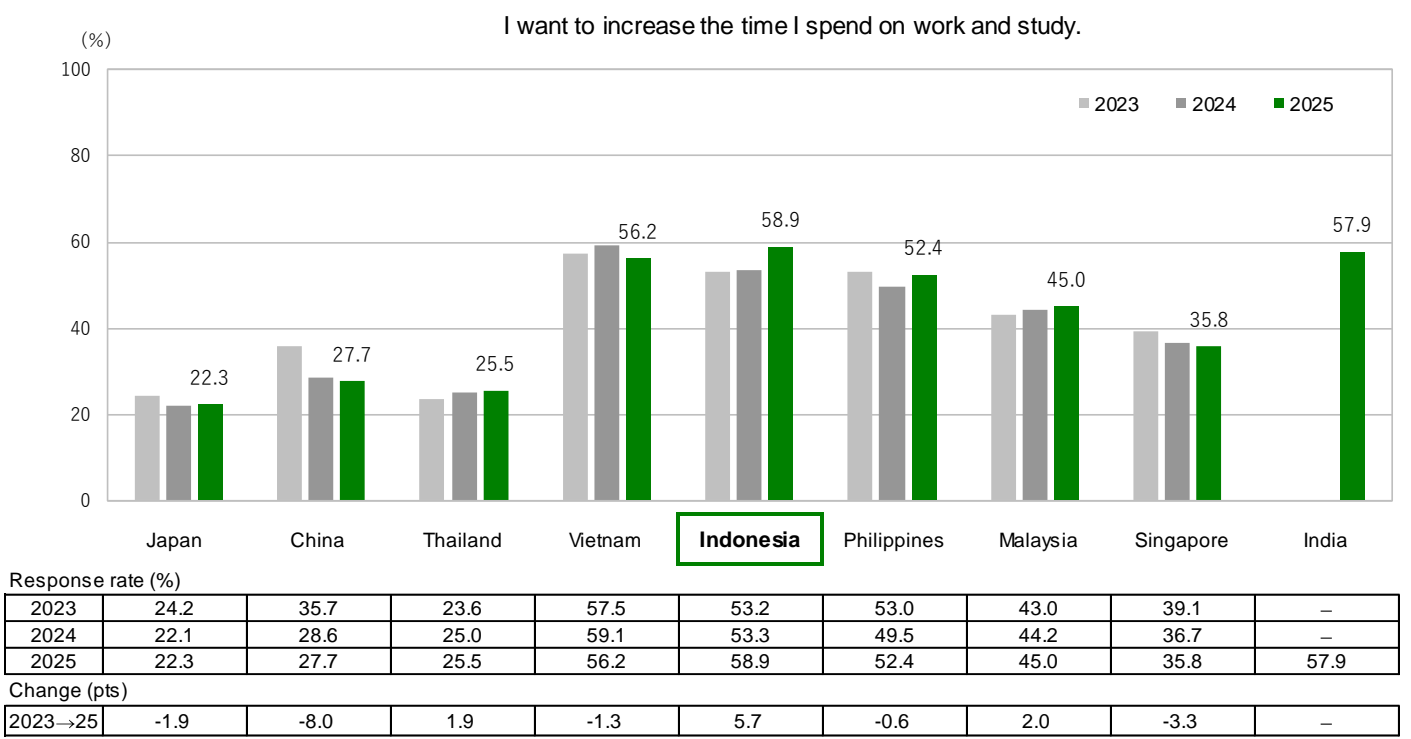


# I want to increase the time I spend on work and study.

Local researcher's comment



Indonesia ranked first at 58.9%, up 5.7 pts from 2023, while most other countries recorded a decline or slight increase. The survey was conducted in the Jakarta area, where many people come from the various islands and provinces of Indonesia to join in the competition. People from rural areas say they were astonished at the fast pace of life when they first came to Jakarta. Given the growing population and economy, *sei-katsu-sha* are perhaps increasingly motivated to work and study harder to keep up with others.

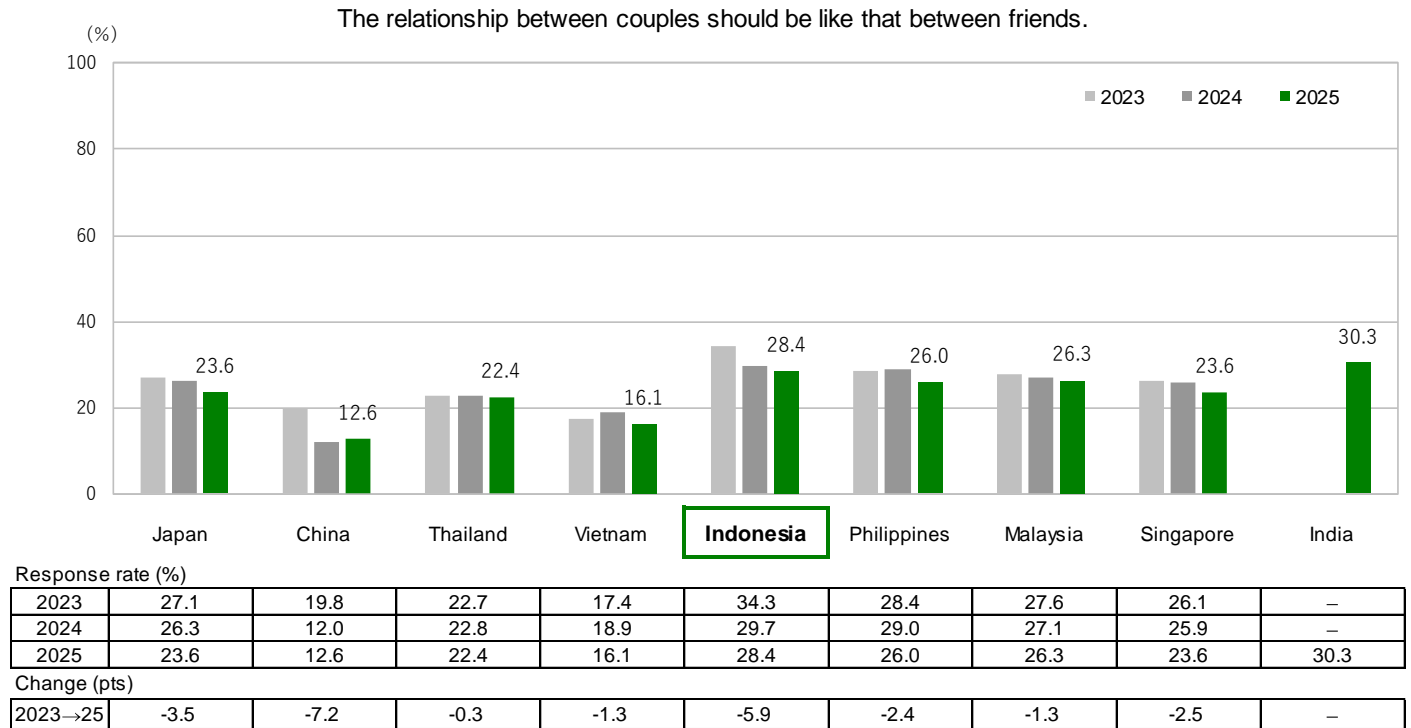


# The relationship between couples should be like that between friends.

Local researcher's comment



Indonesia ranked second at 28.4%, down 5.9 pts from 2023, showing a faster decline than most other countries. (Although the 2025 result for China shows a drop of 7.2 pts from the 2023 level based on reference data, it points to an increase of 0.6 pt vs. 2024.) In Indonesia, religious teaching states that the father and mother (husband and wife) should play defined roles at home. Many believe that playing these roles faithfully will make a prosperous family. The trend in the data seems to reflect the wish of *sei-katsu-sha* to build a good family by respecting those traditional roles of husband and wife, rather than by building a friend-like relationship.





## I don't mind working abroad.

Local researcher's  
comment



The Philippines ranked first at 50.1%, up 5.7 pts from 2023, while many other countries showed a decline or remained unchanged. Many Filipinos go to work abroad due to economic factors and thanks to their English proficiency, hence the lower psychological barrier to working abroad. Reportedly, more *sei-katsu-sha* in the Philippines have been working online recently as English conversation teachers or employees for restaurants overseas (reception, booking) to use their language skills.

### I don't mind working abroad.



Response rate (%)

2023	11.0	21.6	25.8	29.5	45.0	44.4	39.2	33.6	—
2024	11.5	13.5	24.3	32.3	42.7	48.6	35.2	33.1	—
2025	10.3	13.7	24.9	31.4	43.7	50.1	36.1	32.1	31.0

Change (pts)

2023→25	-0.7	-7.9	-0.9	1.9	-1.3	5.7	-3.1	-1.5	—
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## I desire youth.

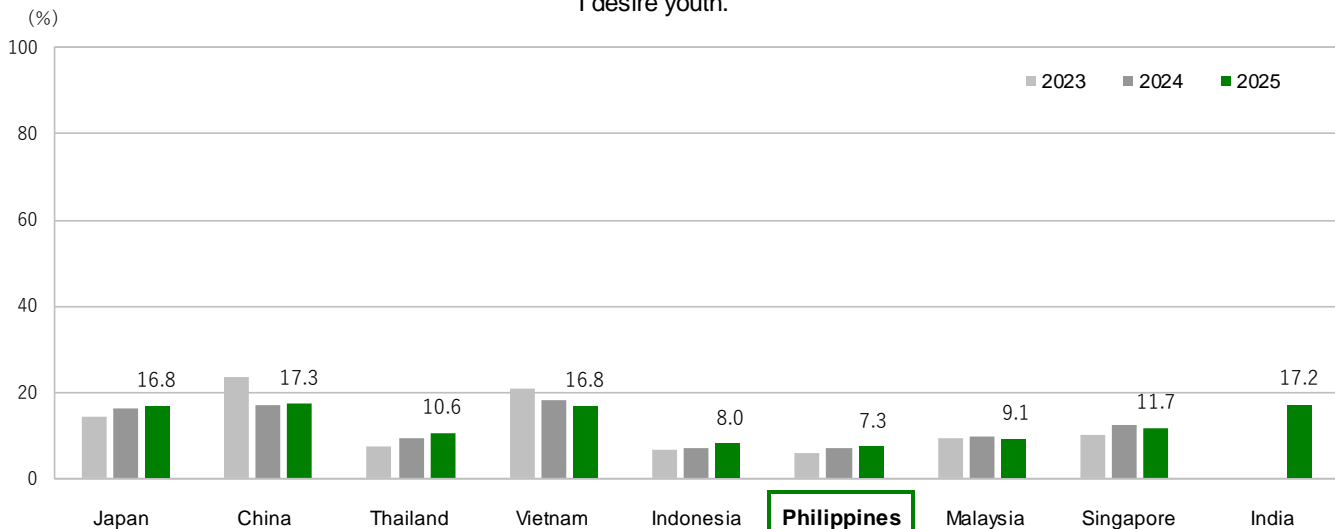
Local researcher's  
comment



The Philippines ranked last at 7.3%, up 1.6 pts from 2023. Their weak desire for youth may be explained by a couple of factors. One is the country's young population. Indeed, the average age of the population is 25 (48 in Japan),\* and so Filipinos are likely to be less worried about getting old. The second factor is the national trait of respect for older persons. Three generations often live in the same household in the Philippines, with grandparents playing distinctive roles like taking care of grandchildren and passing on knowledge and wisdom to the next generation, and thus are respected by their children and juniors in the neighborhood. This may be one reason why Filipinos have a less negative view of aging.

\*According to the Philippine Statistics Authority (PSA), the average (median) age of the population was 25.3 as of 2020.  
<https://psa.gov.ph/content/age-and-sex-distribution-philippine-population-2020-census-population-and-housing>

### I desire youth.



Response rate (%)

2023	14.4	23.5	7.3	20.7	6.6	5.7	9.4	10.2	—
2024	16.2	17.1	9.5	18.0	7.2	6.9	9.7	12.4	—
2025	16.8	17.3	10.6	16.8	8.0	7.3	9.1	11.7	17.2

Change (pts)

2023→25	2.4	-6.2	3.3	-3.9	1.4	1.6	-0.3	1.5	—
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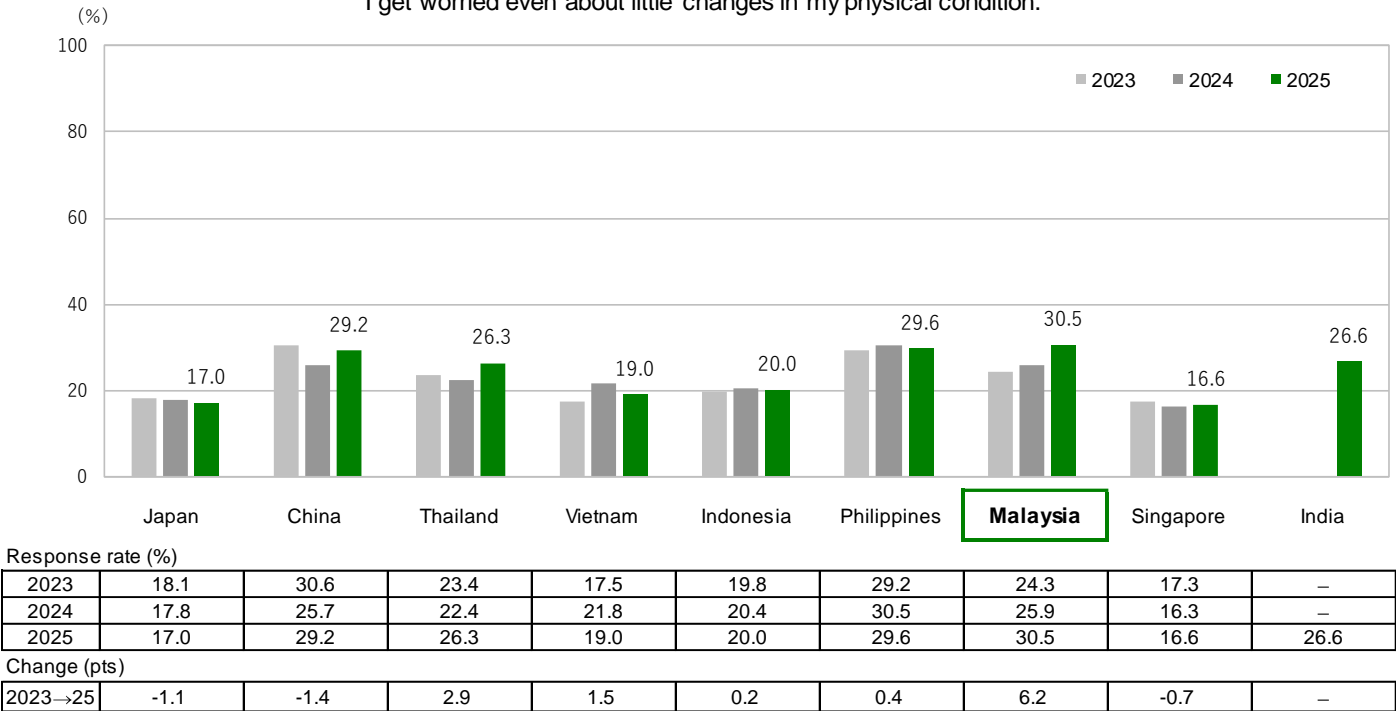
# I get worried even about little changes in my physical condition.

Local researcher's comment



Malaysia ranked first at 30.5%, up 6.2 pts from 2023, recording the largest change among the nine countries. Malaysian *sei-katsu-sha* are motivating themselves to keep moving forward in search of prosperity for their family and nation. The survey results indicate that a healthy body is considered an important asset in this effort. The door-to-door survey in Malaysia survey revealed that many families had health food and exercise equipment at home.

I get worried even about little changes in my physical condition.



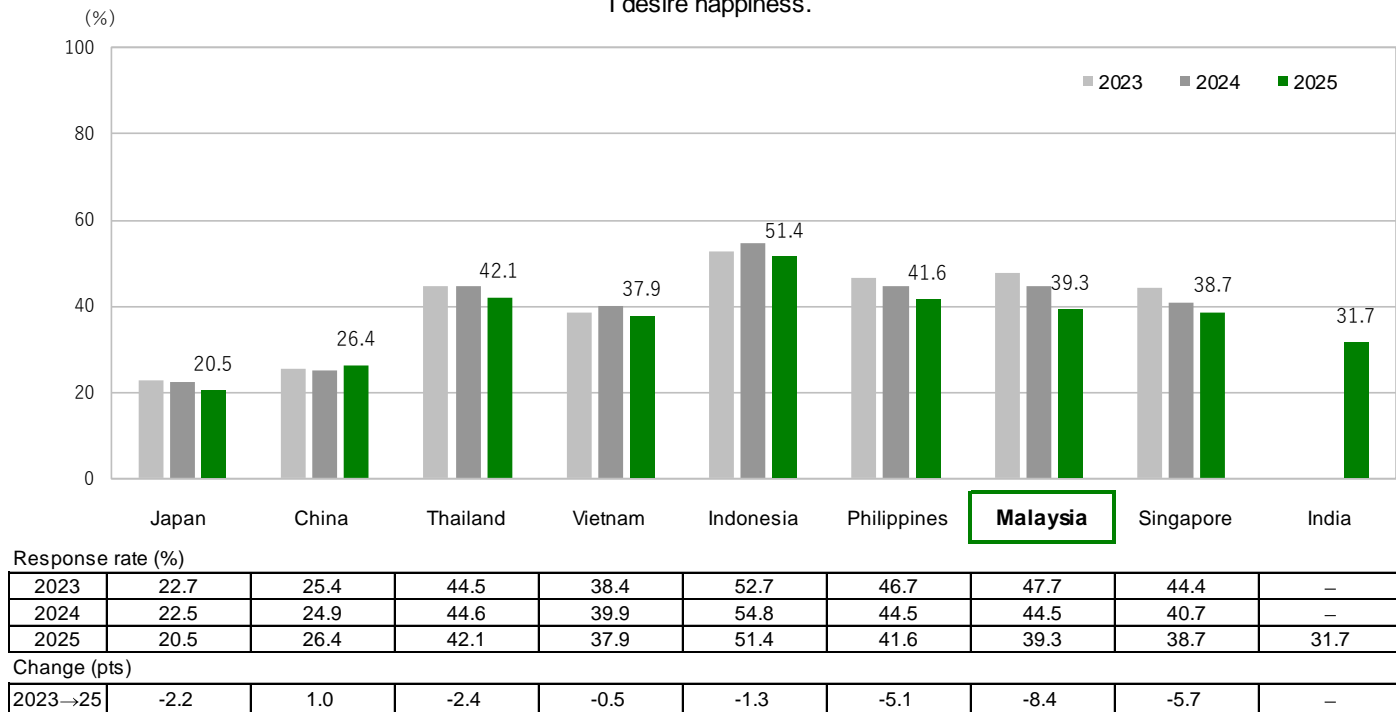
# I desire happiness.

Local researcher's comment



Malaysia ranked fourth at 39.3%, down 8.4% from 2023, recording the biggest drop among the nine countries. Given that Malaysian *sei-katsu-sha* are quite religious and respect family life, the fact the "happiness" score was trending down and the size of that decline were great surprises. The three things that Malaysian *sei-katsu-sha* desire the most are money, health and happiness in that order, but happiness is the only item in the list that saw its importance decline. Elsewhere, items that have become more important include a stable life, love and dreams. The survey results suggest a public perception that monetary and physical stability comes first in order to be happy.

I desire happiness.



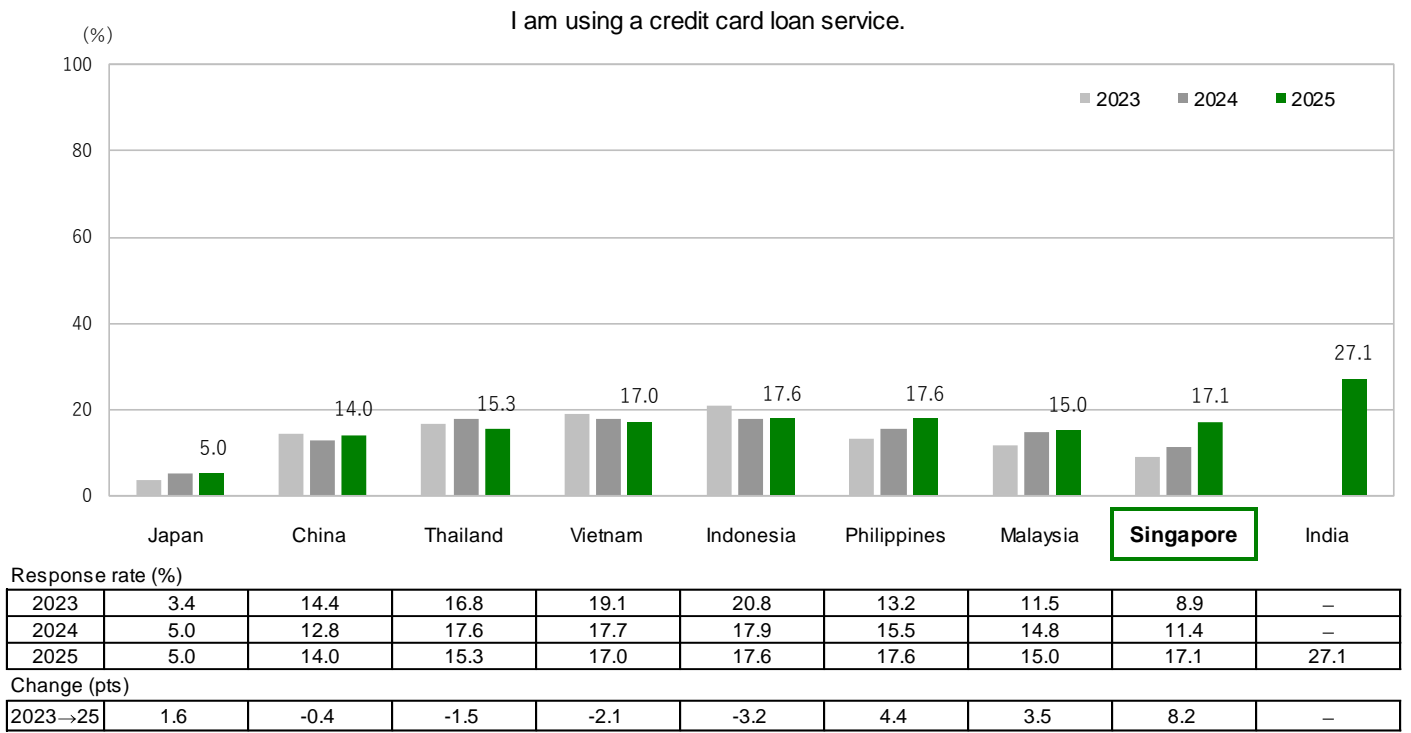


I am using a credit card loan service.

Local researcher's  
comment



Singapore ranked fourth at 17.1%, up 8.2 pts from 2023, recording the largest change among the nine countries. Meanwhile, the response “I want to put money toward savings” declined 7.8 pts from 2023 to 46.2%. This may be attributed to the high cost of living in Singapore, which might be getting even higher as prices continue to rise due to recent global developments. Other factors might include less anxiety about life after retirement. In Singapore, people who have reached 65 are entitled to monthly pension-like benefits paid from the Central Provident Fund (CPF), a mandatory saving scheme. Since most retirees can live well on retirement and pension benefits, they may prefer to spend money on themselves in the present, rather than saving it for a rainy day.

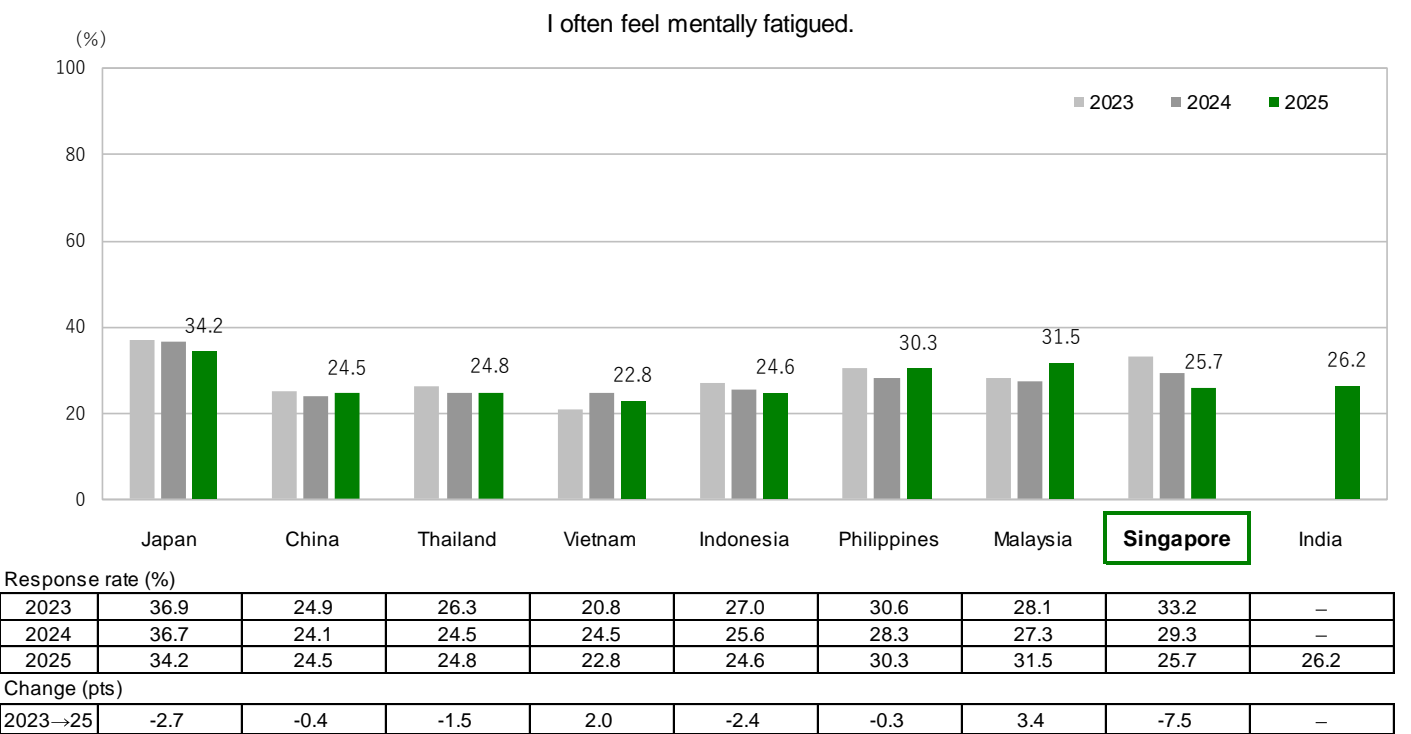


I often feel mentally fatigued.

Local researcher's  
comment



Singapore ranked fifth at 25.7%, down 7.5 pts from 2023, the largest **change** among the nine countries. Given the *kiasu* mentality (desire to get ahead in everything due to the fear of losing out or being left behind) of Singaporean *sei-katsu-sha*, always required to reach for the top and keep winning, the downtrend in stress-related scores was a surprise. Possible reasons may be more flexible workstyles after the pandemic, measures taken by the government and businesses to raise awareness of and address stress and mental care issues, and rising awareness among *sei-katsu-sha* about work–life balance and mental health.



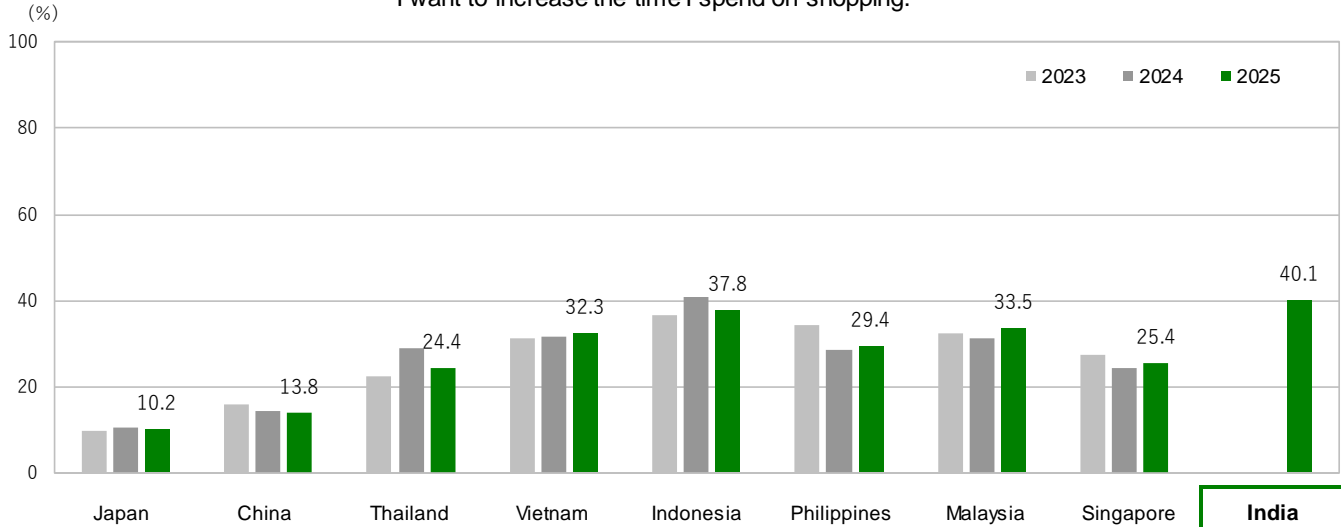
## I want to increase the time I spend on shopping.

Local researcher's  
comment



India ranked first at 40.1%, indicating an inclination toward material affluence characteristic of an emerging economy amid significant economic growth in recent years. Consumer appetite seems to be increasing among Indians who expect household incomes to keep rising; they can afford to stretch beyond their budget for expensive products to upgrade living infrastructure, such as cars, motorbikes and smartphones, helped by less psychological resistance to loan financing.

### I want to increase the time I spend on shopping.



Response rate (%)

2023	9.8	15.9	22.4	31.4	36.5	34.1	32.5	27.4	—
2024	10.5	14.3	29.0	31.5	40.9	28.7	31.4	24.3	—
2025	10.2	13.8	24.4	32.3	37.8	29.4	33.5	25.4	40.1

Change (pts)

2023→25	0.4	-2.1	2.0	0.9	1.3	-4.7	1.0	-2.0	—
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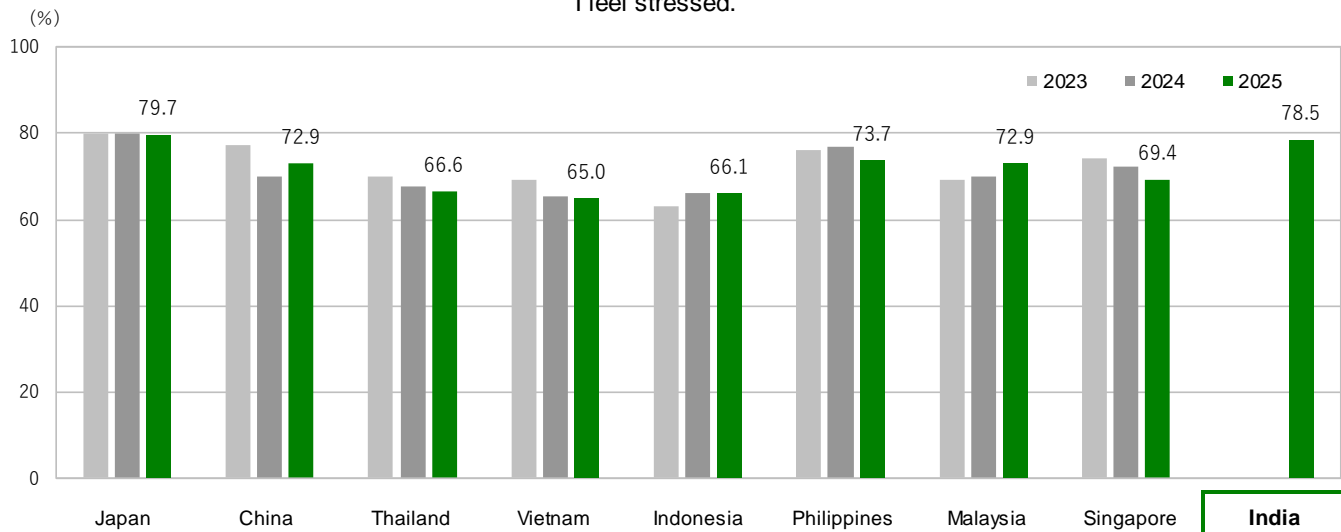
## I feel stressed.

Local researcher's  
comment



India ranked second at 78.5%, which is an interesting result indicating that Indians are almost as stressed as the Japanese, who are known to be living in a stressful society. Although Indian *sei-katsu-sha* may seem to be optimistic, enjoying themselves every day, in reality, they live in a society where competition, including for entrance exams and promotion, is harsh, and inflation is rising. The higher stress level than in most of the other countries suggests a problem lurking behind economic growth in India.

### I feel stressed.



Response rate (%)

2023	79.9	77.2	69.9	69.4	63.2	76.3	69.4	74.3	—
2024	79.9	70.0	67.7	65.2	66.0	76.8	70.0	72.3	—
2025	79.7	72.9	66.6	65.0	66.1	73.7	72.9	69.4	78.5

Change (pts)

2023→25	-0.2	-4.3	-3.3	-4.4	2.9	-2.6	3.5	-4.9	—
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What is the Global Chronological Lifestyle Survey on *Sei-katsu-sha*?

- The Global Chronological Lifestyle Survey on *Sei-katsu-sha* identifies the traits of *sei-katsu-sha* in different countries by asking them questions covering some 480 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 Global Chronological Lifestyle Survey on *Sei-katsu-sha* 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 Global Chronological Lifestyle Survey on *Sei-katsu-sha* 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, ASEAN, and India.

Overview of the Global Chronological Lifestyle Survey on *Sei-katsu-sha*

Survey area: Japan (Greater Tokyo and Hanshin regions)  
China (Beijing, Shanghai, Guangzhou)  
ASEAN (Thailand, Vietnam, Indonesia, Philippines, Malaysia, Singapore)  
India (Delhi, Mumbai, Bengaluru) \*India was added to the survey in 2025.

Sample size: 13,000 (14 areas in nine countries)

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

Allocation:

	Japan		China			Thailand	Vietnam	Indonesia	Philippines	Malaysia	Singapore	India		
	Greater Tokyo	Hanshin	Beijing	Shanghai	Guangzhou							Delhi	Mumbai	Bengaluru
Total	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	668	666	666
Male	500	500	500	500	500	500	500	500	500	500	500	334	333	333
Female	500	500	500	500	500	500	500	500	500	500	500	334	333	333
Aged 15–19	110	110	110	110	110	110	110	110	110	110	110	74	74	74
Aged 20–29	222	222	222	222	222	222	222	222	222	222	222	148	148	148
Aged 30–39	224	224	224	224	224	224	224	224	224	224	224	148	148	148
Aged 40–49	224	224	224	224	224	224	224	224	224	224	224	148	148	148
Aged 50–59	220	220	220	220	220	220	220	220	220	220	220	150	148	148

Survey period: January 6–31, 2025  
January 15–31, 2024  
January 10–31, 2023 (reference data)

\*Please note that the 2023 data for China are only presented for reference as different research agencies and panels were used for the 2023 and 2024 survey.

Survey method: Online survey

Planning & analysis: Hakuhodo Institute of Life and Living (HILL)

Implementation & tabulation: QO, Inc. (former H.M. Marketing Research, Inc.)  
Macromill China Insight, Inc.

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

## Hakuhodo Institute of Life and Living Shanghai

HILL Shanghai, a wholly owned subsidiary of Hakuhodo Inc. of Japan established in 2012, is the Hakuhodo Group's think tank 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 *sei-katsu-sha* and puts forward ideas for new ways of living
- Research on specific themes: Analysis of specific product categories including automobiles, cosmetics and foodstuffs, 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

<https://www.shenghuozhe.cn>

## Hakuhodo Institute of Life and Living 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 and other activities: Research and analysis from the local perspectives of each ASEAN nation and the organization of forums across ASEAN

<https://hillasean.com/>



Hakuhodo Institute of Life and Living  
**JAPAN / CHINA / ASEAN**

## ■ 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](http://www.hakuhodo-global.com)

Media contacts:  
Corporate Public Relations Division  
[koho.mail@hakuhodo.co.jp](mailto:koho.mail@hakuhodo.co.jp)