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Hakuhodo Institute of Life and Living Shanghai unveils The Dynamics of Chinese People 2025
## *Zhìxiàng*: A new desire emerging among Chinese *sei-katsu-sha* beyond the spread of AI

Chinese *sei-katsu-sha* cleverly incorporating AI into their lives to refine their individuality
and discover the direction they should take

Tokyo—March 17, 2026—Hakuhodo Institute of Life and Living Shanghai (HILL Shanghai) unveiled the 13th set of findings from its The Dynamics of Chinese People research project jointly conducted with the School of Advertising and Branding at the Communication University of China.

This year's theme was "Portents of New Attitudes and Behaviors Emerging Among Chinese *Sei-katsu-sha* Beyond the Spread of AI." With the emergence of Chinese-developed generative AI starting around 2025, AI has rapidly spread through Chinese society, significantly influencing *sei-katsu-sha*'s attitudes and behaviors. *Sei-katsu-sha* (our term for the holistic person) in China are actively embracing the use of AI, not only because AI adoption is being advanced as a national strategy, but also because they have experienced firsthand how technologies such as e-commerce and mobile payments have enhanced convenience in their daily lives.

Currently, AI use in China is primarily viewed as a task efficiency tool for streamlining work and information gathering, but many people are also leveraging AI to enhance their hobbies and acquire knowledge and skills they wish to learn. Furthermore, some individuals are now emerging who control their emotions through their interactions with AI, and who rediscover their strengths and unique characteristics through collaborative work and dialogue with AI.

Risks, particularly (AI-related) job losses, loss of motivation and ability to interact with others, and decline in motivation to learn proactively are debated in AI-related research and papers in China and elsewhere. However, while Chinese *sei-katsu-sha* also harbor some of these concerns, those who are more adept at utilizing AI appear to be handling it well, discovering their own unique strengths, and turning new perspectives and insights gained from conversations with AI into inspiration. They are beginning to leverage AI to hone their strengths and to discover what they truly love and enhance their engagement those things. *Zhìxiàng*. This is the name we have given to the desire, which is emerging among Chinese *sei-katsu-sha*, to cleverly incorporate AI into their lives to refine their individuality and discover the direction they should take. The neologism takes one Chinese character each from the Chinese words for *AI* and *direction*.

Zhì xiàng

智 向

Chinese *sei-katsu-sha* cleverly incorporating AI
into their lives to refine their individuality
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Hakuhodo Institute of Life and Living Shanghai
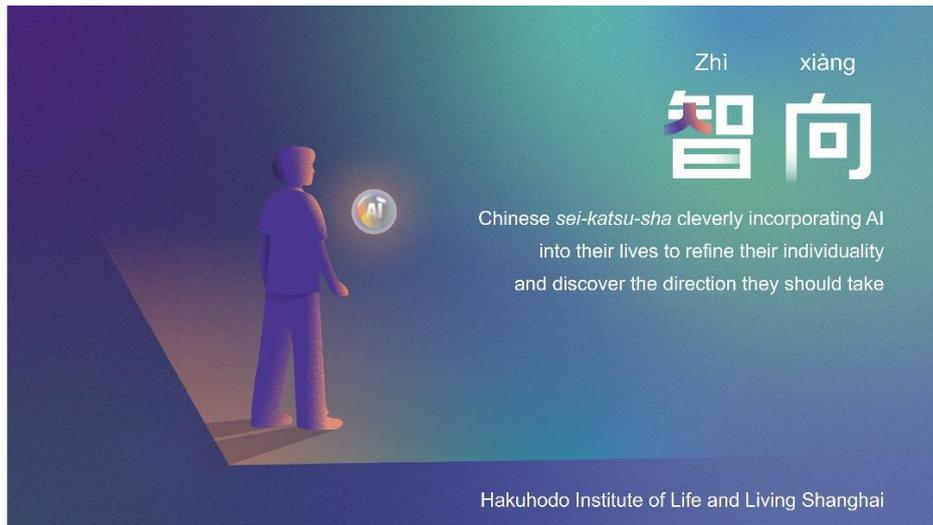
At the March 17 launch event for The Dynamics of Chinese People 2025, HILL Shanghai introduced the new behaviors and shifting attitudes that Chinese *sei-katsu-sha* are beginning to adopt amid the widespread adoption of AI, with data and specific examples. If you would like to receive a copy of the report distributed at the launch event (available in Japanese, Chinese and English), please contact Hakuhodo Institute of Life and Living Shanghai at: sei-katsu-sha.info@hakuhodo-shzy.cn.
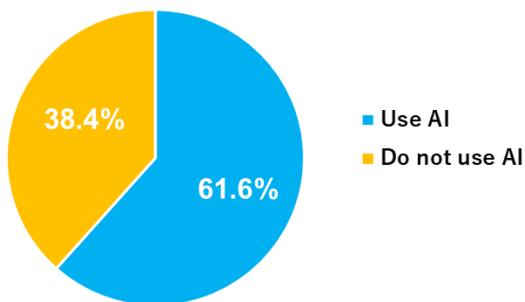
Reference Data

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(1) AI Usage Frequency and Acceptance

61.6% of respondents answered that they use AI. Approximately 85% of them use it at least once a week, and more than half of those aged 18–39 use it five or more days a week. Few users feel anxious about AI, with many expressing hopefulness.
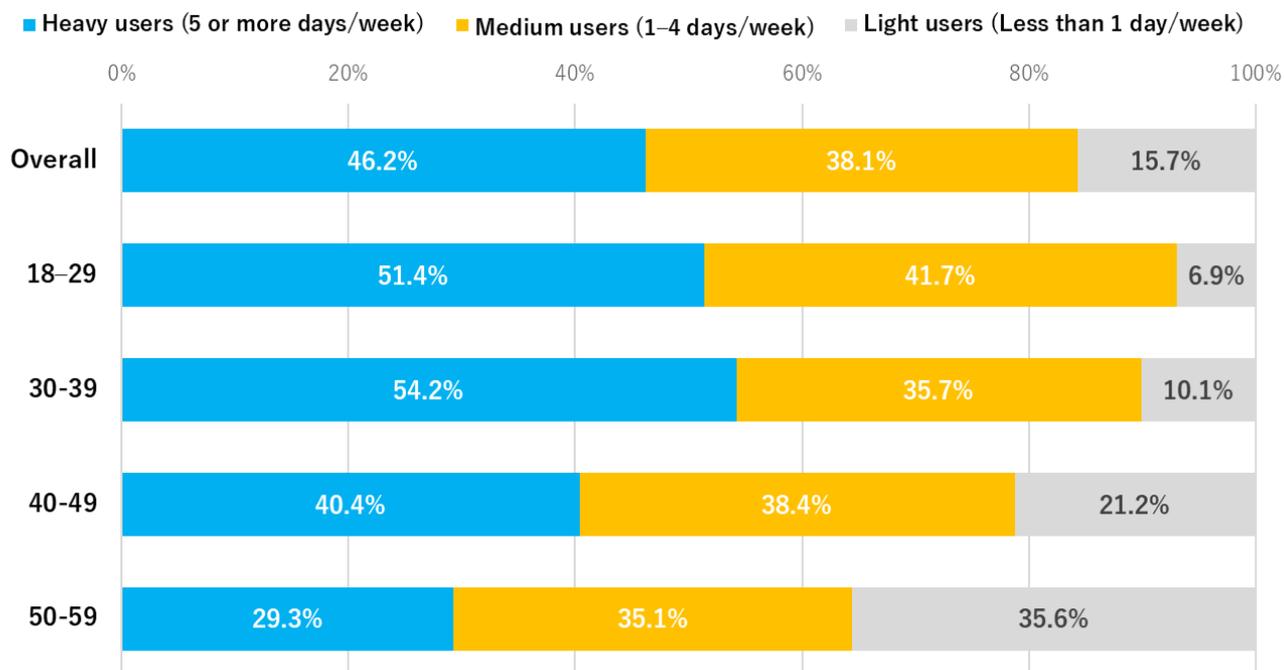

- 61.6% of respondents answered that they use AI. (Data 1)

- When AI users were asked about their frequency of use, heavy users, who use AI five or more days per week, accounted for 46.2%. When combined with the 38.1% of medium users (1–4 days per week), approximately 85% of AI users use it one or more days per week. Heavy users account for the highest proportion of AI users in their 30s, 54.2%, and it appears they are leveraging AI to use their time efficiently amid busy days filled with work and childcare. (Data 2)

- Attitudes toward AI are also positive, with approximately 70% of AI users (68.6%) reporting that they are hopeful about it. (Data 3)
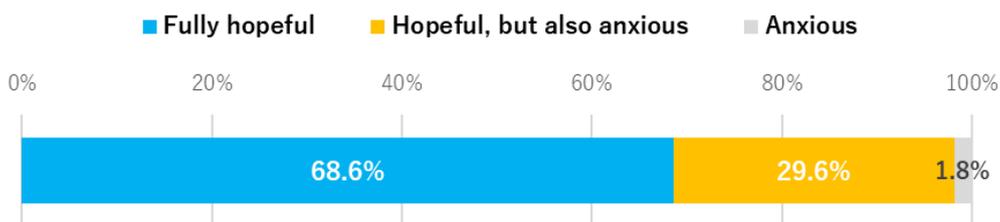
Data 1: Proportion of AI Users

- Use AI — 61.6%
- Do not use AI — 38.4%

Data 2: Frequency of AI Use *Basis: AI Users

■ Heavy users (5 or more days/week)　■ Medium users (1–4 days/week)　■ Light users (Less than 1 day/week)

	Heavy users	Medium users	Light users
Overall	46.2%	38.1%	15.7%
18–29	51.4%	41.7%	6.9%
30-39	54.2%	35.7%	10.1%
40-49	40.4%	38.4%	21.2%
50-59	29.3%	35.1%	35.6%

Data 3: Attitudes Toward AI *Basis: AI Users

■ Fully hopeful　■ Hopeful, but also anxious　■ Anxious

Fully hopeful	Hopeful, but also anxious	Anxious
68.6%	29.6%	1.8%

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(2) Main Purposes and Intentions of AI Use

Based on an interview survey on AI users, the main purposes of AI usage were classified into four categories: **Task Efficiency, Enhancing Hobbies/Skills, Emotional Control and Smart Self-Reflection**. Currently, the most common uses are task efficiency and enhancing hobbies/skills, but going forward, it is expected that use for emotional control and smart self-reflection purposes will also expand.

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- We gathered data on AI users' actual behavior patterns and the situations in which they use AI through an interview survey, and organized AI use purposes into four categories using a horizontal axis Actions to Make Life Easier versus Actions to Deepen/Enhance and a vertical axis Actions for Visible Change versus Actions for Internal Change, classifying them into four categories: Task Efficiency, Enhancing Hobbies/Skills, Emotional Control, and Smart Self-Reflection. (Figure)

- When AI users were asked to what extent they currently use AI for each purpose, Task Efficiency ranked highest at 80.0%, followed by Enhancing Hobbies/Skills at 65.2%.

- When asked about their future intentions on a five-point scale, over 90% of respondents expressed interest in using (Use intention will increase + Use intention will somewhat increase) for Task Efficiency (96.8%) and Enhancing Hobbies/Skills (92.8%). In addition, over 70% of respondents indicated they would like to utilize AI for Smart Self-Reflection to discover themselves and hone in on aspirations through conversations with AI (70.8%), and for Emotional Control to gain comfort and relieve stress (78.1%). There are signs that the purposes of AI use will expand significantly into internal domains such as emotional fulfillment and self-exploration. (Data 5)

Figure: Main Purposes of AI Use

Created by Hakuhodo Institute of Life and Living Shanghai based on "Qualitative Survey on AI Use" findings
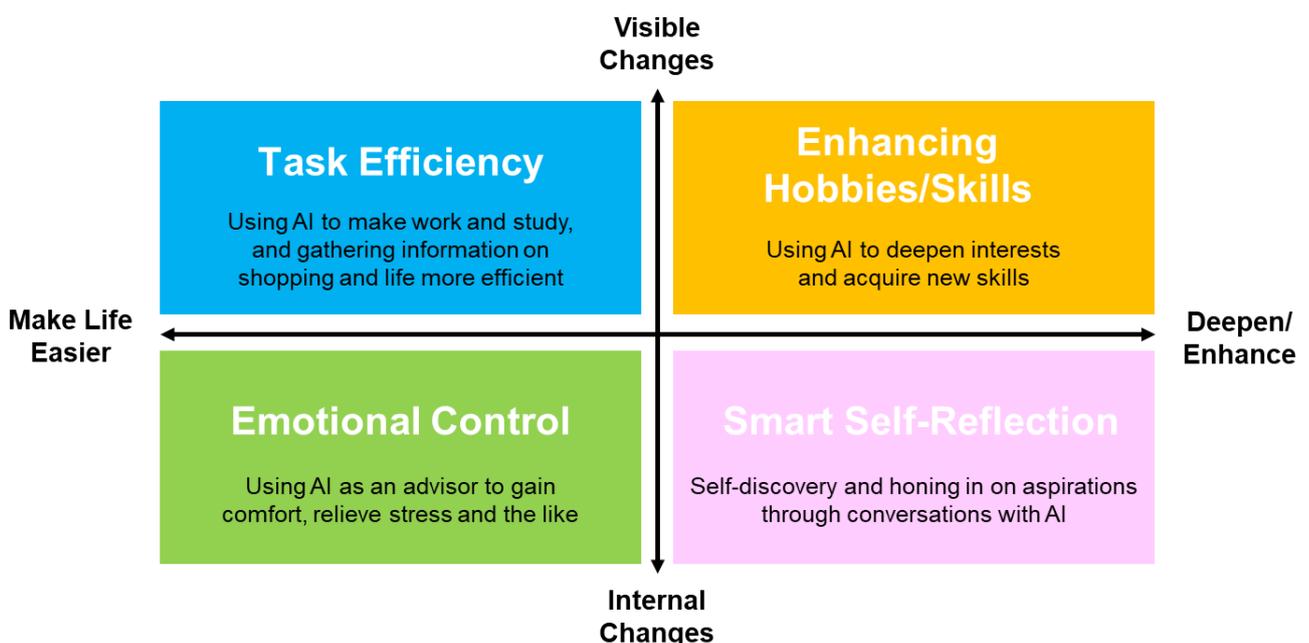
Data 4: Current Use Purposes *Basis: AI users

Q: For what purposes do you currently use generative AI? (Multiple response)

(%)

	Task Efficiency	Enhancing Hobbies/Skills	Emotional Control	Smart Self-Reflection
	80.0	65.2	38.8	29.7

Hakuhodo Institute of Life and Living Shanghai, "Quantitive Survey on AI Use" (n=3,000)
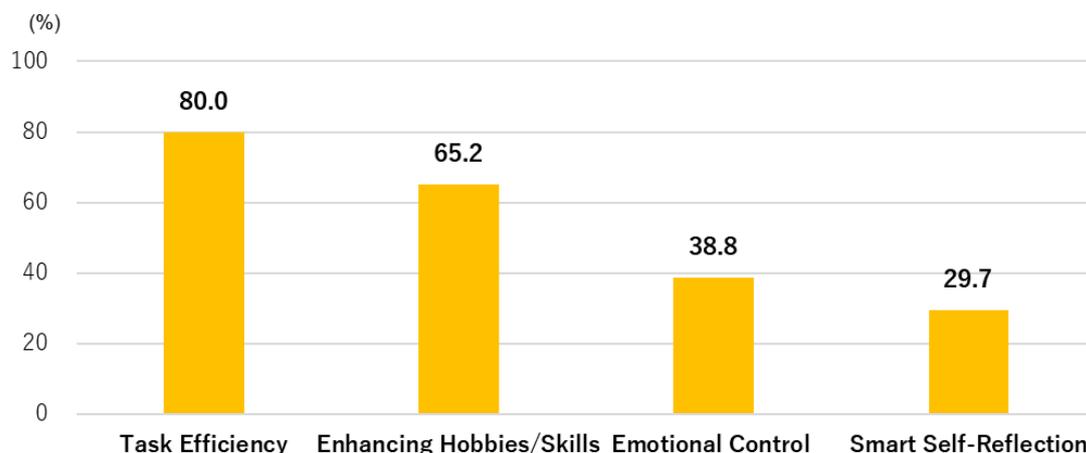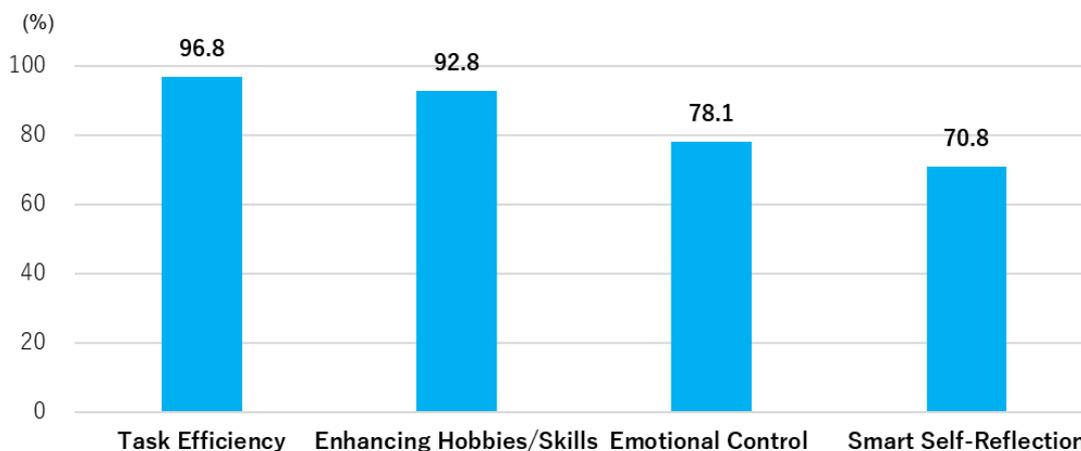
Data 5: Future Use Intentions *Basis: AI users

Q: In regard to each AI use purpose, how do you think your AI use intentions will change in the future?

(Select one response from the five-point scale: Use intention will increase, Use intention will somewhat increase, No change, Use intention will somewhat decrease, Use intention will decrease)

(%)

	Task Efficiency	Enhancing Hobbies/Skills	Emotional Control	Smart Self-Reflection
	96.8	92.8	78.1	70.8

Vales for the totals of those who responded Use intention will increase + Use intention will somewhat increase are shown

Hakuhodo Institute of Life and Living Shanghai, "Quantitative Survey on AI Use" (n=3,000)

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(3) Attitude of Chinese AI Users Toward Concerns About the Spread of AI

With the rapid spread of AI, various risks are also cause for concern. However, AI users in China focus more on the positive aspects of AI and see it as an opportunity to discover their strengths and what they love.

As AI becomes more widespread, there are concerns about risks such as job losses, loss of motivation and ability to interact with others, and decline in motivation to learn proactively. However, when we interviewed AI users, we found that rather than becoming overly cautious due to awareness of risks, they are discovering their own strengths through AI, using AI as a support for maintaining emotional balance or as a social advisor,

and lowering the barriers to learning and information exploration with AI to help them pursue their interests and aspirations. (Table)

Table: Global Concerns about the Spread of AI and Chinese AI Users' Response Behaviors

Main concerns associated with the spread of AI	Behavior of Chinese AI users	Underlying attitudes
1. Reduced employment opportunities/motivation Concern that AI will take jobs and reduce motivation to work and develop skills	**Leave simple tasks to AI and explore their own unique value** Delegate routine tasks and basic work to AI and focus on areas that AI does not excel at, such as creative thinking, decision-making and human responses	**Desire to discover and leverage their abilities and characteristics**
2. Loss of motivation and ability to interact with others Concern that satisfaction with interactions with AI will lead to loss of motivation and ability to interact with real people	**Use AI and real-life mentors for different purposes. Improve real-life social skills using AI** Organize their thoughts through dialogue with AI so as to approach interactions with real people with a positive mindset. Or, learn advanced social skills from AI and use them in real-world social situations	**Desire to refine their inner self so as to be able to handle different situations through real interactions with other people**
3. Decline in proactive desire to explore Concern that as answers can be found easily and at any time with AI, the desire to think for oneself and explore something deeply will be lost	**Reduce barriers to exploration using AI** Use AI to lower the barriers to starting something new or exploring something, such as time and money and the effort and anxiety of trial and error	**Desire to explore hobbies that suit them and that they want to deepen, and skills they want to enhance**

Created by Hakuhodo Institute of Life and Living Shanghai based on interview survey and dialogue with experts

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(4) A New Attitude Among Chinese *Sei-katsu-sha* Beyond the Spread of AI
Zhìxiàng: A desire emerging among Chinese *sei-katsu-sha* to cleverly incorporate AI into their lives to refine their individuality and discover the direction they should take.

In an age of high uncertainty, Chinese *sei-katsu-sha* who harbor anxieties and doubts about the future do not view AI as merely a "tool for efficiency." Rather, by proactively mastering and utilizing AI, they continue to enhance their own unique strengths and expand their potential.

A desire to cleverly incorporate AI into their lives to refine their individuality and discover the direction they should take. Once AI permeates every aspect of daily life, we believe that this desire—*Zhìxiàng*—will spread even further among Chinese *sei-katsu-sha*.

Outline of surveys conducted in relation to this research

■ Qualitative Research Utilizing AI (300 samples)

Respondent qualifications: Males and females aged 18–59 living in Tier 1–4 cities, generative AI users

Survey method: Interviews conducted using AI

Survey period: November 2025

Conducted by: JIU YUAN QIAN CHANG (SH) Management Consulting Co., Ltd.

■ Interview Survey with Advanced AI & General AI Users (30 samples)

Respondent qualifications: Males and females aged 20–59 living in Tier 1–3 cities,

Survey method: One-on-one in-depth interviews (90 minutes) and analysis of lifestyle photographs

Survey period: September–October 2025

Conducted by: Shanghai Horizon Research Co., Ltd.

■ Quantitative Survey on AI Use (3,000 samples)

Respondent qualifications: Males and females aged 18–59 living in Tier 1–4 cities, generative AI users

*Respondents who answered "Use generative AI" in a screening survey (4,871 samples)

Survey method: Online survey

Survey period: October–November 2025

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

About 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 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-s*ha insight-based marketing activities

The Dynamics of Chinese People is a joint presentation of research findings by HILL Shanghai and the School of Advertising and Branding at the Communication University of China. Held annually, The Dynamics of Chinese People research presentations analyze changes in the behavior and desires of Chinese *sei-katsu-sha*, and put forward unique keywords. *Zhìxiàng* is the project's 13th set of findings, following *Zìzhù xiāofèi* in 2024.

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